

THE JOURNEY CONTINUES

# CONNECTATL

MAY 3-6, 2015

## What's New In HR V11.1

Mark Morrill, HR Development Manager

Ryan Libby, HR Development Supervisor



# Today's Agenda

Next Year Planning/Staffing Planner

Employee Evaluations

Talent Acquisition Management

Benefits Enrollment

Employee Self Service – ESS

Additional HR Development

# Next Year Planning & Staffing Planner

Mark Morrill, HR Development Manager

Ryan Libby, HR Development Supervisor

# Position Control and Budgeting – In case you missed these



- 10.4
  - Position Budget Request
- 10.5
  - Position Budget Detail update
  - Mass Salary Change program
  - Openings can be created from new positions posted from a projection
  - Actions can be created based on employee changes in a projection



# Next Year Planning

- New interface to help prepare for next year
- Similar to Salary and Benefits Projections
- Creates records as “next year” records
- Reduce the timing issues that are inherent and allow for mass changes ahead of time
- Preparation is for a specific year
- Records are created as Next Year records

# Next Year Planning

Next Year Planning - Munic

HOME

Accept Cancel Search Add Update Print Excel Attach Refresh Text Return

Confirm Search Actions Output Office Tools Menu

Year Start End

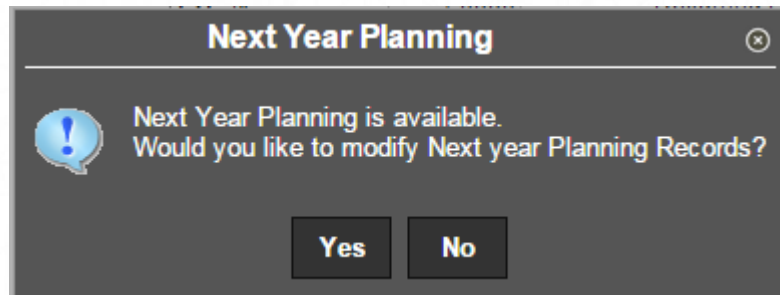
2015 01/01/2015 12/31/2015

Next Year Salary Processing Post Next Year Created

Setup	Employee Maintenance	Pay Increases/Calculations
Pay Type Code	Employee Master	Contract Increases/Decreases
PR Allocation	Employee Job Salary	Step Increases
Salary Tables	Employee Import	Mass Index Step Increases
Job Class Code		Pay Band Increase
Position Control		Longevity Report
Calendar		
Index Step		

# Next Year Planning

- Advantages to NYP
  - Next Year records are created in a sandbox similar to projection
  - Mass changes can be done in NYP
  - “Live” records can be kept sync with NYP records
  - User is prompted when making a change to job salary in Live to move that change to NYP
  - Ability to post records back to Live when it's time to open the school year
  - Accepts posting from Staffing Planner



# Next Year Planning – Date-based deductions

- An employee may now have the same deduction/benefit multiple times with different start and end dates
- Yes, that's right, future dating deductions
- Old deductions are available for inquiry right from the Employee Deductions program
- Current deductions are found by default
- New search period option available when searching for deductions



# Next Year Planning – Date based deductions

Employee Deductions - Munic

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print Text file PDF Preview Excel Word Email Schedule Attach Notes Notify Audit Maplink Alerts Return

Confirm Search Actions Output Office Tools

**Employee Identification**

Employee SSN Last Name First Name MI Suffix Status

Deduction Loc Group/BU

Main Cycles Insurance Health Insurance Escrow Garnishments Optional Life COBRA

Start Date End Date ☒ Active

Search Period ☒ Current ☐ All ☐ Historical ☐ Future ☐ Specific Date

Calc Code

Factor

Marital Status

Allowances Additional Allowances ☒ Exempt

Employee Amt/Pct Employer Amt/Pct

Employee Ann Amt Employer Ann Amt

Employer Remaining

Employee Limit Employer Limit

Vendor Number Address Reference

**Direct Deposit**

Bank Routing Number ☒ Prenote

Account Number ☐ Checking ☐ Savings

# Staffing Planner

- HTML5 application – iPads, tablets
- Integrated with Next Year Planning
- Used to match employees with positions
- Rosters are created to organize positions and employees for manipulation
- Rosters can pull from a projection, next year planning or recommended applicants
- Positions can be marked to be removed
- Employees can be swapped between positions
- FTE's are managed at location and position level with grand totals
- Posting back to a projection/next year planning set

# Staffing Planner – Generating a Roster

ROSTERS

Staffing Planner

Travis Sparks

Search

Q

+ Add Roster

X Delete Roster

↻ Refresh Roster

👤 Roster Assignments

Search

Actions

View

Main

Ranges

Roster Code

ROS103

Description

Test Roster 103

Notes

Test roster for projection 103 using a subset of locations and positions

Status

New

Refreshed

Created

Apr 14, 2015 8:55:07 AM

Posted

Save

Cancel

ROSTERS

Staffing Planner

Travis Sparks

Search

Q

+ Add Roster

X Delete Roster

↻ Refresh Roster

👤 Roster Assignments

Search

Actions

View

Main

Ranges

Add Range Type

Location (1)

Actions

From

ADM

To

MUN

Remove

Position (1)

Actions

From

1

To

8000000

Remove

Save

Cancel

# Staffing Planner – Roster View

Staffing Planner

https://falpwws-tsparks.corp.tylertechnologies.com/Tyler.Munis.Hosting.WebClients/AppHost/StaffingPlanner#/

Munis.Net Dev Dashboards Home - Payroll & HR Home - Silverlight Home - Virtual Server JIRA Munis.Net Host Sett... Report Manager SL Pattern Lib html5 Pattern Lib

ROSTER Staffing Planner

TMS Roster Filter Save Changes Undo Changes

Travis Test Roster

- Location: 000 PRIVATE: KEEP OUT (JP0) FTE: 1 / 1
- Location: 027 LOCATION 27 FTE: 1 / 1
- Location: 112 FALMOUTH HIGH SCHOOL FTE: 2 / 4
- Location: 114 LINWOOD MIDDLE SCHOOL FTE: 0.45 / 1
- Location: 115 PARSONS ELEMENTARY SCHOOL FTE: 1 / 1
- Location: 1973 RR LOCATION FTE: 11 / 10

Position: 333 - RR POSITION Job Class: 333 - RR JOB FTE: 7 / 8

Emp Number	Name	FTE
8471	CARSON, ALEXIS CATHERINE	1
88	CHU, RHIAN	1
101	CRITES, BEN	1
29	MASTERS, BEN	1
91	NEWNAMELONGLASTNAME, GUYWITHAVEERY P	1
45	O'BURNS, CHARLES M	1
19	PEDROIA, DUSTIN	1

Position: 335 - RR POSITION Job Class: 335 - RR 3 JC FTE: 2 / 1

Position: 336 - RR SUB POSITION Job Class: 336 - RR JOB FTE: 2 / 1

Location: 1973 - RR LOCATION

Job Class: 333 - RR JOB

Position: 333 - RR POSITION

Employee Name: CRITES, BEN

FTE: 1

All Assignments

Loc	Job	Pos	FTE
1973	333	333	1

Activate Windows  
Go to PC settings to activate

# Staffing Planner – Location Detail

▼ Location: 1973 RR LOCATION

FTE: 11 / 10



Position: 333 - RR POSITION

Job Class: 333 - RR JOB

FTE: 7 / 8



Emp Number	Name ^	FTE		
8471	CARSON, ALEXIS CATHERINE	1	↕	✕
88	CHU, RHIAN	1	↕	✕
101	CRITES, BEN	1	↕	✕
29	MASTERS, BEN	1	↕	✕
91	NEWNAME LONG LASTNAME GUYWITHAVERY P	1	↕	✕



# Staffing Planner – Employee List

Staffing Planner

https://falpwws-tsparks.corp.tylertechnologies.com/Tyler.Munis.Hosting.WebClients/AppHost/StaffingPlanner#/

Munis.Net Dev Dashboards Home - Payroll & HR Home - Silverlight Home - Virtual Server JIRA Munis.Net Host Sett... Report Manager SL Pattern Lib HTML5 Pattern Lib

ROSTER Staffing Planner

TMS Roster

Filter Save Changes Undo Changes

Travis Test Roster

Roster	Actions	View
8467 CULLEN, EDWARD	EJF2	EJF0
200501 VANGOHMA, VINCENT ROBERT	TEN2	TEN3
200504 SANZIO, MICHELANGELO DON	TEN	TEN3
200510 POLLOCK, JACKSON DAVID	TEN	TEN5
200508 DAVINCI, LEE O	TEN	TEN4
200503 PICASSO, PABLO JIM	TEN	TEN2
200502 MONET, CLAUDE E	TEN	TEN2
200501 VANGOHMA, VINCENT ROBERT	TEN	TEN2
200512 RENOIR, BILLY MICKY	TEN	TEN3
200511 SANZIO, RAPHAEL MIDDLE	TEN	TEN2
200505 DONATELLO, NICCOLO M	TEN	TEN3
65000 RENO, JEAN	EJF5	21SP
101013 RYAN PROOF, TESTING	EJF5	21SP
25008 FIDELITY, TESTING TOBIAS	EJF5	21SP
260001 SMITH, JOSEPH I	ROB1	5555
32 JONES, TRACY	TMS	TMS
979797 LOGGINS, PAULIE	TMS	TMS
9311 MOLEMAN, HANS	ST	3601
202 ROSE, CHARLOTTE K	027	MATH

Location  
TMS - TMS LOC

Job Class  
TMS - TMS

Position  
32 - SUPPORT POSITION

Employee Name  
JONES, TRACY

FTE  
0

All Assignments

Loc	Job	Pos	FTE
TMS	TMS	32	0

Activate Windows  
Go to Settings to activate Windows.

# Employee Evaluations

Mark Morrill, HR Development Manager

Ryan Libby, HR Development Supervisor

# Evaluations – In case you missed these

- 10.4
  - Forms for customizing ESS employee evaluation forms
- 10.5
  - 360 degree evaluations - peer to peer, supervisor to employee, employee to supervisor, self evaluations

# Employee Evaluations - Goals

- We have added a new tab for Goals
  - Date goals should be achieved
  - Goal description
  - Weight of goal
  - Custom rating
  - Comments about the goal
  - Can be completed in ESS by the supervisor



# Employee Evaluations - Goals

Confirm	Search	Actions	Output	Office	Tools	Menu
---------	--------	---------	--------	--------	-------	------

**Employee Identification**

Employee	SSN	Last Name	First Name	MI	Status
200501 ...	875-45-6321	VANGOHMA	VINCENT	R	A - ACTIVE ▼

ReviewRecommendationEvaluation**Goals**

Date	Description	Weight	Rating	Comments
03/31/2015	By the end of Q1, I would expect that you are able to process basic changes through Personnel Actions on a regular basis.	0.0000		
06/30/2015	By mid-year 2015, I would expect that you are familiar with Salary and Benefit Projections and will be the go-to person in that area.	0.0000		
09/30/2015	By the end of Q3 2015, I would expect that you are able to oversee the administration of Benefits Enrollment, including Employee Notifications.	0.0000		

OverallEmployeeGoalsDevelopRecommend

**Workflow**

Approve	Reject	Hold	Forward	Approvers
---------	--------	------	---------	-----------



# Employee Evaluations – ESS Goals



## Goals

**3/31/2015**      0.0000

By the end of Q1, I would expect that you are able to process basic changes through Personnel Actions on a regular basis.

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**6/30/2015**      0.0000

By mid-year 2015, I would expect that you are familiar with Salary and Benefit Projections and will be the go-to person in that area.

---

**9/30/2015**      0.0000

By the end of Q3 2015, I would expect that you are able to oversee the administration of Benefits Enrollment, including Employee Notifications.

# Evaluations Workflow

- Supervisor by Position enabled for workflow
- Allows for multiple supervisors to rate employees based on setting

Payroll Control Settings - Munis > Payroll Control Settings

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print PDF Excel Word Email Schedule Attach Notify Maplink Alerts Show/Hide Cols Customize Screen Form Return

Record Number	Category	Label	Value
134	SUPERVISORS	SUPERVISOR BY POSITION (ACCRUALS)	N
135	SUPERVISORS	SUPERVISOR BY POSITION (EMPLOYEE EVALUATIONS)	N
136	SUPERVISORS	SUPERVISOR BY POSITION	Y
137	SUPERVISORS	SUPERVISOR BY POSITION (TIME ENTRY)	N
138	SUPERVISORS	SUPERVISOR BY POSITION (TRAINING COURSES)	N

Search / Filter

Record

153 of 172

# Evaluations – Competency Text Unlimited

**Evaluation Competencies - Munis**

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global+ Duplicate Print Text file PDF Excel Word Email Schedule Attach Notes Audit Maplink Alerts Return

Confirm Search Actions Output Office Tools

Code: 4  
Competency: PROFESSIONALISM  
Short Desc: PROFESSION  
Weight: 20.00

Text

4 of 6

**File Edit Tools Insert Help**

Employee professionalism includes verbal and written communication. Employees must present written communications in a clear and concise format, and ensure that long communications are replaced by face-to-face discussions. If documentation of a discussion is required, minutes should also be clear, concise, and accurate. Verbal communication must be clear and direct, but pleasant. |

Check Spelling Display as HTML

# Evaluations – Acknowledgement Emails

Personnel Settings - Munis

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print PDF Excel Word Email Attach Notes Audit Maplink Alerts Return

Confirm Search Actions Output Office Tools

Settings Position Control Training **Evaluations** Quick History

☐ Use Matrix Verification  
☐ Post Online after Approval  
**☒ Acknowledge Email Text**

**Evaluation 360 Defaults**

360 Source Type	360 Source Code
1 - Supervisor Evaluation	
2 - Peer Evaluation	
3 - Self Evaluation	
4 - Manager Evaluation	

File Edit Tools Insert Help

Available Tags: [\*ReviewType\*] , [\*ReviewPeriod\*]  
[\*SupervisorName\*] , [\*EmployeeName\*] , [\*EmployeeComments\*]

I, [\*EmployeeName\*], acknowledge that I have reviewed my performance review for [\*ReviewPeriod\*].

☒ Check Spelling Display as HTML

# Talent Acquisition Management

Mark Morrill, HR Development Manager

Ryan Libby, HR Development Supervisor



# Applicant Tracking – In case you missed these

- V10.4
  - Employee information on Applicant Master to show previous employment and position info
  - Gallup changed to Test Integration - redirects to testing site
- 10.5
  - Applicant Master Custom Datatype Codes
  - Job opening restrictions
  - Save incomplete job applications for later completion
  - Employment Opportunities Page in ESS

# Applicant Tracking – Hiring Central

- Tool for Hiring Manager and Recruiters
- Simple searching
- Quick view of open positions “My Job Openings”
- Easily drill down into applicants
- Open search for applicants
- HTML5 technology for cross browser support
- Leverages Hiring Manager, Recruiter, Recruitment Status, and Recruitment Ranking
- Allows for updating directly from application without the need to drill down

# Applicant Tracking – Hiring Central

- Allows for updating directly from application without the need to drill down
  - Pending Status
  - Recruitment Ranking
  - Recruitment Status
  - Comments
  - Recommend launches Pending Applicants program
  - Emailing applicant directly
  - Emailing link to someone else which launches Applicant Central

# Applicant Tracking – Hiring Central



JOB OPENINGS

Hiring Central

 Mark Morrill

Search by job opening description or number



[Advanced Search](#)

[My Job Openings](#)

# Applicant Tracking – Hiring Central


**JOB OPENINGS**

Hiring Central

 Mark Morrill

 Job Openings
  Applicant
  Pending Applications
  Applicant Central
  Excel


 Advanced
  My Job Openings

Job Openings: 8 

Job Opening	Description	# of Applicants	Location	Status	ReqType	Hiring Manager	Recruiter
16 - 1	DAVES QA POSITION	3	TRAINING LOCATION	NEW	VACANT POSITION		SMITH, ARRON M
17 - 1	SOFTWARE ENGINEER REQ 17-1	1	LINWOOD MIDDLE SCHOOL	PERPETUAL OPEN	NEW POSITION	SCULLY, DANA O	SMITH, ARRON M
18 - 2	JOB 18-2 JENN TESTING MY WOR	1	JENN'S LOCATION	NEW	NEW POSITION		SMITH, ARRON M
27 - 1	RJC FBI X-FILES ( NO SALARY	2	RJC LOCATION 2	PERPETUAL OPEN	NEW POSITION		SMITH, ARRON M
29 - 2	PRIMARY OPERATIVE	1	RJC LOCATION	PERPETUAL OPEN	NEW POSITION	SCULLY, DANA O	SMITH, ARRON M
29 - 4	RJC HIGH SECURITY OPERATIVE	3	RJC LOCATION	PERPETUAL OPEN	REPLACEMENT	SCULLY, DANA O	SMITH, ARRON M
62 - 1	PAYROLL CLERK EXAM APPLICATI	2	PARSONS ELEMENTARY SCHOOL	APPROVED	NEW POSITION	SCULLY, DANA O	SMITH, ARRON M
62 - 2	PAYROLL CLERK EXAM APPLICATI	1	MAIN OFFICE	APPROVED	NEW POSITION		SMITH, ARRON M



# Hiring Central – Applicants

 JOB OPENINGS

Hiring Central

Mark Morrill

Job opening name or #

Q

Advanced

My Job Openings

Search

Job Openings

Applicant

Pending Applications

Applicant Central

Excel

Notes

Attach (0)

Email

Office

Tools

Options

Applicant Columns

Back

Return

## 29 - 4 RJC HIGH SECURITY OPERATIVE

Hiring Manager: SCULLY, DANA O

[Expand All](#) / [Collapse All](#)

Name ▲	Applic Date	Attach	Pending Status	Recruit Ranking	Recruit Status	Salary Desired	Actions
+ CROSBY, ANNIKA T		02	HIRED	GOOD	INTERVIEW COMPLETED	75,000.00	▼
+ MERGATIATONICWRAITHE, THROATWARRBLERS E	01/22/2010	00	ACCEPTED	GOOD	INTERVIEW SCHEDULED	0.00	▼
+ RODIONOVA, TATIANA K	01/25/2010	00	CANDIDATE	GOOD	NEED TO SCHEDULE INTERVIEW	40,000.00	▼

# Hiring Central – Applicants

File Edit View Favorites Tools Help

JOB OPENINGS Hiring Central Mark Morrill

Search

View/Maintain

Office

Tools


## 29 - 4 RJC HIGH SECURITY OPERATIVE

Hiring Manager: [SCULLY, DANA O](#)

[Expand All / Collapse All](#)

Name	Applic Date	Attach	Pending Status	Recruit Ranking	Recruit Status	Salary Desired	Actions
- <a href="#">CROSBY, ANNIKA T</a>		2	HIRED	GOOD	INTERVIEW COMPLETED	75,000.00	
Jobs Applied For	Description	Applic Date	Hiring Manager	Pending Status	Recruit Ranking	Recruit Status	
<a href="#">16 - 1</a>	DAVES QA POSITION			NEW			
<a href="#">29 - 3</a>	RJC HIGH SECURITY OPERATIVE		SCULLY, DANA O	HIRED			
<a href="#">29 - 4</a>	RJC HIGH SECURITY OPERATIVE		SCULLY, DANA O	HIRED	GOOD	INTERVIEW COMPLETED	
<a href="#">62 - 2</a>	PAYROLL CLERK EXAM APPLICATION - 0062-0002			NEW			
+ <a href="#">MERGATIATONICWRAITHE, THROATWARRBLERS E</a>		01/22/2010	0	ACCEPTED	GOOD	INTERVIEW SCHEDULED	0.00
+ <a href="#">RODIONOVA, TATIANA K</a>		01/25/2010	0	CANDIDATE	GOOD	NEED TO SCHEDULE INTERVIEW	40,000.00

# Hiring Central – Applicants

 JOB OPENINGS

Hiring Central

Mark Morrill

Job opening name or #

Advanced

My Job Openings

Job Openings

Applicant

Pending Applications

Applicant Central

Excel

Notes

Applicant Columns

Back

Email

Attach (0)

Office

Tools

Options

Return

View/Maintain

## 29 - 4 RJC HIGH SECURITY OPERATIVE

Hiring Manager: [SCULLY, DANA O](#)

[Expand All](#) / [Collapse All](#)

Name ^	Applic Date	Attach	Pending Status	Recruit Ranking	Recruit Status	Salary Desired	Actions
+ <a href="#">CROSBY, ANNIKA T</a>		02	HIRED	GOOD	INTERVIEW COMPLETED	75,000.00	
+ <a href="#">MERGATIATONICWRAITHE, THROATWARRBLERS E</a>	01/22/2010	00	ACCEPTED	GOOD	INTERVIEW SCHEDULED		View/Maintain
+ <a href="#">RODIONOVA, TATIANA K</a>	01/25/2010	00	CANDIDATE	GOOD	NEED TO SCHEDULE INTERVIEW		Edit Status Comment Recommend Email Applicant Email Link

# Hiring Central – Applicants

File Edit View Favorites Tools Help

Hiring Central

Mark Morrill

Job Opening: 29 - 4

Applicant: CROSBY, ANNIKA T

Pending Status	Recruitment Ranking	Recruitment Status
HIRED	GOOD	INTERVIEW COMPLETED

Save Cancel

Job opening name or #

Advanced My Job Openings

29 - 4 RJC HIGH SECURITY OPERATIVE

Hiring Manager: SCULLY, DANA O

Expand All / Collapse All

Name

- + CROSBY, ANNIKA T
- + MERGATIATONICWRAITHE, THROATWARRBLERS E
- + RODIONOVA, TATIANA K

	Salary Desired	Actions
COMPLETED	75,000.00	
SCHEDULED	0.00	
SCHEDULE INTERVIEW	40,000.00	

# Hiring Central – Applicants

The screenshot displays the 'Hiring Central' web application interface. A modal window titled 'Job Opening: 29 - 4' is open, showing the following details:

- Job Opening:** 29 - 4
- Applicant:** CROSBY, ANNIKA T
- Comment:** TEST COMMENT LLL
- Buttons:** Save, Cancel

The background interface includes a sidebar with navigation options: Job Openings, Applicant, and Pending Applicant. The main content area shows a list of job openings, with the first one being '29 - 4 RJC HIGH SECURITY OPERATIVE' managed by 'SCULLY, DANA O'. The table below lists the applicant's details:

Name	Status	Rating	Interview Status	Salary Desired	Actions
+ CROSBY, ANNIKA T	HIRED	EXCELLENT	INTERVIEW COMPLETED	75,000.00	



# Hiring Central – Applicants

- Recommend launches Pending Applicants in “Recommend” mode

HOME Pending Applicants - Munis

Accept Cancel Search Browse Query Builder Add Update Delete Global+ Duplicate Print Text file PDF Excel Word Email Attach Notes Notify Audit Maplink Alerts Return

Confirm Search Actions Output Preview Office Tools Alerts Return

Req # Suffix Description Job Family

Applicant SSN Last Name First Name Middle Name MI Suffix

075-44-6321 CROSBY ANNIKA TATIANA T

Applicant Attachments

Main Recommendation

Status

Applicant Status

Workflow Status

Recruitment Status

Comment

Rejection Reason

Rejection Notes

Employee Number

Application Date

Checklists

Text

Eligibility

Date Score Score Rank Recruitment Ranking

Workflow

Approve Reject Hold Forward Approvers

# Hiring Central – Applicants

The screenshot shows an Outlook interface with a blue sidebar on the left containing 'Newsletters', 'Social updates', and 'Folders'. The main area is titled 'Inbox' and shows a list of email drafts. The selected email is from 'reallyreallyreallyreallylongemailaddress@gmail.com' with the subject '[Draft] Please review this MUNIS - Applicant Central record'. The preview pane on the right shows the email body, which includes the text 'Applicant Central record of applicant: (1136) CROSBY, ANNIKA T' and a URL: 'https://webapps2.tylertech.com/int\_dev/munis/dev/AppHost/applicantscentral#/7e-bEt%2F5%252B6wqb8Dq9S0LTUfokvb8s%2Fin%2FKSDdHE8cN8U%3D'.

**Outlook**

**Inbox**

All ▾

☐ No recipients  
[Draft] Please review this MUNIS - Applicant Central record 3:09 PM

reallyreallyreallyreallylongemailaddress@gmail.com 3:08 PM  
[Draft] No subject

jon.greenier@hotmail.com 8:55 AM  
[Draft] Hi Jon,

robin.bohannon@jefferson.kyschools.us Tue  
[Draft] No subject

No recipients  
[Draft] Munis link: Personnel Action Entry: Apr 14

No recipients  
[Draft] HR MUNIS SIF Agent Overview.doc Apr 9

jwatson3102bn@gmail.com Apr 6  
[Draft] No subject

ttegel@epiphanymgmt.com Apr 6  
[Draft] No subject

No recipients  
[Draft] Professional+Development+&+Medical+Services+Overview.pdf Apr 3

jsburleigh@franklincountypa.gov Mar 25  
[Draft] No subject

TFS\_Server@tylertech.com Mar 23  
[Draft] No subject

fbeaulieu@oobmaine.com Mar 17  
[Draft] No subject

klogan@cityofchesapeake.net Mar 17  
[Draft] No subject

NRuksznis@travelexperts.com Mar 12  
[Draft] No subject

No recipients  
[Draft] Munis Major Enhancements for Early Adoption Version 11.1 HR/... Mar 10

No recipients  
[Draft] Munis Major Enhancements for Early Adoption Version 11.1 HR/... Mar 10

**To**

**Cc**

[Draft] Please review this MUNIS - Applicant Central record [More](#)

Applicant Central record of applicant: (1136) CROSBY, ANNIKA T

[https://webapps2.tylertech.com/int\\_dev/munis/dev/AppHost/applicantscentral#/7e-bEt%2F5%252B6wqb8Dq9S0LTUfokvb8s%2Fin%2FKSDdHE8cN8U%3D](https://webapps2.tylertech.com/int_dev/munis/dev/AppHost/applicantscentral#/7e-bEt%2F5%252B6wqb8Dq9S0LTUfokvb8s%2Fin%2FKSDdHE8cN8U%3D)

# Hiring Central – Applicants

## Applicant information columns ×

### Available columns


- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Application Date    | <input checked="" type="checkbox"/> Pending Status     |
| <input checked="" type="checkbox"/> Recruitment Ranking | <input checked="" type="checkbox"/> Recruitment Status |
| <input checked="" type="checkbox"/> Salary Desired      |  |

[Select all](#)   [Unselect all](#)

OK


Cancel


# Hiring Central – Link to Applicant Central

 **APPLICANTS**


Applicant Central

Mark M





 Advanced

Search


 Applicant

View/Maintain


 Pending Applications


 Excel

Office


 Notes

Tools

 Attach (5)

 Setup Tiles

Options

 Back

Return

## KAMINSKI, FRANK

ACTIVE, Applied: 04/06/2015 [mark.morrill@tylertech.com](mailto:mark.morrill@tylertech.com)

**Applicant**  
Applicant Number  
109  
Last Update  
04/06/2015  
Available Start  
Phone  
207-222-2222  
Referral

**Certifications**

Type	Area
------	------

  
**Custom Data**

Field	Data
AUTO-CORRECTIO	FALSE
YEARS @ FORMER	0
YEARS W/ FORMEF	0

**Reference Checks**

Date	Checked By
------	------------

  
**References**  
1

**Tests/Conditions**  
0

**Work History**

# Applicant Tracking - Interfaces

- Polaris – Real-time teacher testing service similar to Gallup
- J.D. Palatine – Real-time background checking service

Confirm	Search	Actions	Output	Office	
General	Background Checks	MSS Options	Test Integration	MSS Field Access	MSS Profile Access
AmericanChecked URL	<input type="text" value="https://www.jdpalatine.net/send/interchange"/>				
AmericanChecked Verify	<input type="text" value="AMCV - AMERICHECKD VERIFY"/>				
AmericanChecked Complete	<input type="text" value="AMCC - AMERICHECKD COMPLETE"/>				
AmericanChecked License	<input type="text" value="AMD L - DRIVER'S LICENSE"/>				
AmericanChecked State	<input type="text" value="AMDS - DRIVER'S STATE"/>				
JD Palatine Status	<input type="text" value="JDPS - JD PALATINE STATUS"/>				
JD Palatine Complete	<input type="text" value="JDPC - JD PALATINE COMPLETE"/>				
JD Palatine Report	<input type="text" value="JDPR - JD PALATINE REPORT"/>				
JD Palatine Error	<input type="text" value=""/>				
Background Check Days	<input type="text" value="9999"/>				




# Applicant Tracking – Expanded XML Import





- New program – Applicant XML Import Definitions
- Allows customization through tagging of groups
- Allows for mapping of Munis fields


# Applicant Tracking – Expanded XML Import


HOME


Applicant XML Import Definitions - Munis


Accept


Cancel


Search


Browse


Query Builder


Add


Update


Delete


Global


Duplicate


Print


Text file


PDF


Preview

Excel

Word

Email

Schedule

Attach

Confirm

Search

Actions

Output

Office

**Code**






**Description**

Tag	Field	Description
first_name	FNAME	FIRST NAME
last_name	LNAME	LAST NAME
middle_init	MNAME	MIDDLE INITIAL
addr_1	ADDR1	ADDRESS LINE 1
addr_2	ADDR2	ADDRESS LINE 2
city	CITY	CITY
state	STATE	STATE
zip	ZIP	ZIP CODE


# Applicant Inquiry – Tyler Notify


- Search on any criteria available in Applicant Inquiry
- Generate emails, phone calls
- Templates can be created for the communication desired


# Applicant Inquiry – Tyler Notify



Applicant Master - Munis > Applicant Notifications


HOME


Accept  
Confirm




Cancel


Search  
Search




Browse  
Query Builder


Add




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Actions


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Email  
Schedule  
Office

Attach

Notes  
Notify  
Tools

Audit  
Maplink  
Alerts

Return

Template

Applicant Notification

Description: Applicant Notification

Notification methods

☒ Email

☒ Phone

Contacts

Notify	Type	Key	Full Name	Phone No / Email	Address 1
<input checked="" type="checkbox"/>	Phone	999 000635 01/27/2015	LIBBY, RYAN	207-944-9888	ADDRESS 1
<input checked="" type="checkbox"/>	Email	999 000635 01/27/2015	LIBBY, RYAN	ryan.libby@tylertech.com	ADDRESS 1

# Benefits Enrollment

Mark Morrill, HR Development Manager

Ryan Libby, HR Development Supervisor



# Benefits Enrollment – In case you missed these

- 10.4
  - Always available option in benefits enrollment
- 10.5
  - Marital Enrollment restrictions
  - Number of dependent requirement on enrollment choices
  - Show annual and period costs in ESS BE
  - Benefits enrollment paycheck simulator

# Benefits Enrollment – Increments for Election Amounts

- Increment amount allowed in Enrollment Choices
- Useful for life insurance amounts or whole percentages
- ESS displays and error if amount does not match increment

Election Amounts	
Type	A - AMOUNT-BASED
Low Amt/Pct	40,000.00
High Amt/Pct	60,000.00
Low Salary Factor	0.0000
High Salary Factor	0.0000
Whichever is	
Increments of	1,000.00
<input type="checkbox"/> Use as Employee Limit	

**Incorrect number of beneficiaries**  
**The amount must be in increments of 1000.00**

☒ LIFE INSURANCE AMOUNT BASED  
Amount : 51111

# Benefits Enrollment – Documentation based on amount

- New paper enrollment type “4 – New based on amount change”

Benefit Year	2015		
Section Code	LIFE		
Start Date	01/01/2015	End Date	12/31/2015
Short Description	LIFE		
Long Description	LIFE INSURANCE		

Main

Availability

Links

Display Priority

1

Section Details/Instructions

Enrollment Rules

☒ Allow No Changes

☒ Allow Decline

☐ Sick Bank Enrollment

☐ Cafeteria Plan

Paper Enrollment Form

4 - NEW OR BASED ON AMOUNT CHANGE

20000.00

Can only enroll if enrolled in

# Benefits Enrollment – Beneficiaries as Contingent

- Beneficiaries can be marked as Primary or Contingent
- Prompt will enforce percentages to be correct

**RYAN LIBBY**

First name *	<input type="text" value="MASON"/>
Middle initial	<input type="text"/>
Last name *	<input type="text" value="LIBBY"/>
Suffix	<input type="text"/>
Date of birth *	<input type="text" value="01/15/2011"/>
Gender	<input type="text" value="MALE"/>
Relationship	<input type="text" value="CHILD"/>
SSN # (include dashes)	<input type="text" value="001-22-6777"/>
Percentage *	<input type="text" value="100"/>
Designation	<input checked="" type="radio"/> Primary <input type="radio"/> Contingent
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

# Employee Self Service

Mark Morrill, HR Development Manager

Ryan Libby, HR Development Supervisor



# ESS – Skills Available for View/Edit

- Skills can optionally be opened up to allow add/updates
- Will assist in keeping skills up to date

## Employee Information

Addresses	Enabled - Full Access ▼
Telephone numbers	Enabled - Full Access ▼
Dependents	Enabled - Full Access ▼
Emergency contacts	Enabled - Full Access ▼
Email	Enabled - Full Access ▼
Skills	Enabled - Full Access ▼
Preferred name	Enabled - Full Access ▼
Marital status	Enabled - Full Access ▼

## Skills

[Add Skill](#)

Type	Area	Level	Years	
LANGUAGE	SPANISH		5.0	<a href="#">Change</a>   <a href="#">Delete</a>
SOFTWARE PROGRAMMING	C PROGRAMMING LANGUAGE		3.0	<a href="#">Change</a>   <a href="#">Delete</a>

# ESS – My Actions

- Employees can now initiate certain actions via Personal Information>Add/View Changes
- Status of action will be shown to the employee
- Documentation can be submitted
- History of actions submitted is available
- Templates can be built to customize the actions in ESS

## Add a Personnel Action

Requested action type **EMERGENCY CONTACTS CHANGE** ▼

ESS Header Text for EMG CONTACTS TEMPLATE (Text can be found in pmactsst program)

### EmergencyContacts [Add new](#)

Name\*

John Doe

Relationship Code\*

SPOUSE ▼

Contact Phone

2078889999

Comments Field\*

Primary Contact

Line 1

Main St.

Line 2

City Field

Saco

Contact State

ME

Required ZIP\*

04072

### Attachments

[Choose File](#) No file chosen

[Submit](#)

[Cancel](#)

# ESS – My Actions



## Profile Changes

### Profile changes in progress

[Add a change](#)

Action	Request date	Status	Documentation	
EMERGENCY CONTACTS CHANGE	2/23/2015	In Progress	Emergency Contact Proof	<a href="#">Edit</a>   <a href="#">Delete</a>

### Historical profile changes

Action	Request date	Posted date
--------	--------------	-------------


# ESS – Personnel Action

Employee Identification						
Employee	SSN	Last Name	First Name	Middle Name	MI	
200500 ... +1	721-20-0658	NISBET	THOMAS			

Main		Other	
<b>Action Information</b>			
Effective Date	02/23/2015	Authorization Date	
Action Code	EMGC - EMERGENCY CONTACTS CHANGE	User	wsuser
Reason/Auth		Entry Date	02/23/2015
Supporting Action		Entry Time	09:09:34
On-Boarding Code			<input type="button" value="Checklist"/>
	<input checked="" type="checkbox"/> Create Action History Record		<input type="button" value="Notes"/>
	<input checked="" type="checkbox"/> Employee Initiated		
Action Category	0 OTHER		
Action Number	0		
Approval Date			
Status	X - IN PROGRESS		
Comment			
<b>Electronic File Path</b>			
<b>Workflow</b>			
<input type="button" value="Approve"/>	<input type="button" value="Reject"/>	<input type="button" value="Hold"/>	<input type="button" value="Forward"/>
<input type="button" value="Approvers"/>			

# ESS – Action Templates



HOME

ESS Action Templates - Munis

Accept

Cancel

Search

Browse

Query Builder

Add

Update

Delete

Global+

Duplicate

Print

Text file

PDF

Preview

Excel

Word

Email

Schedule

Attach

Notes

Notify

Audit

Maplink+

Alerts

Return

Confirm

Search

Actions

Output

Office

Tools

ESS Template

Template Code

CONTAC

Description

EMG CONTACTS TEMPLATE

Documentation

3 - Required

ESS Header Text

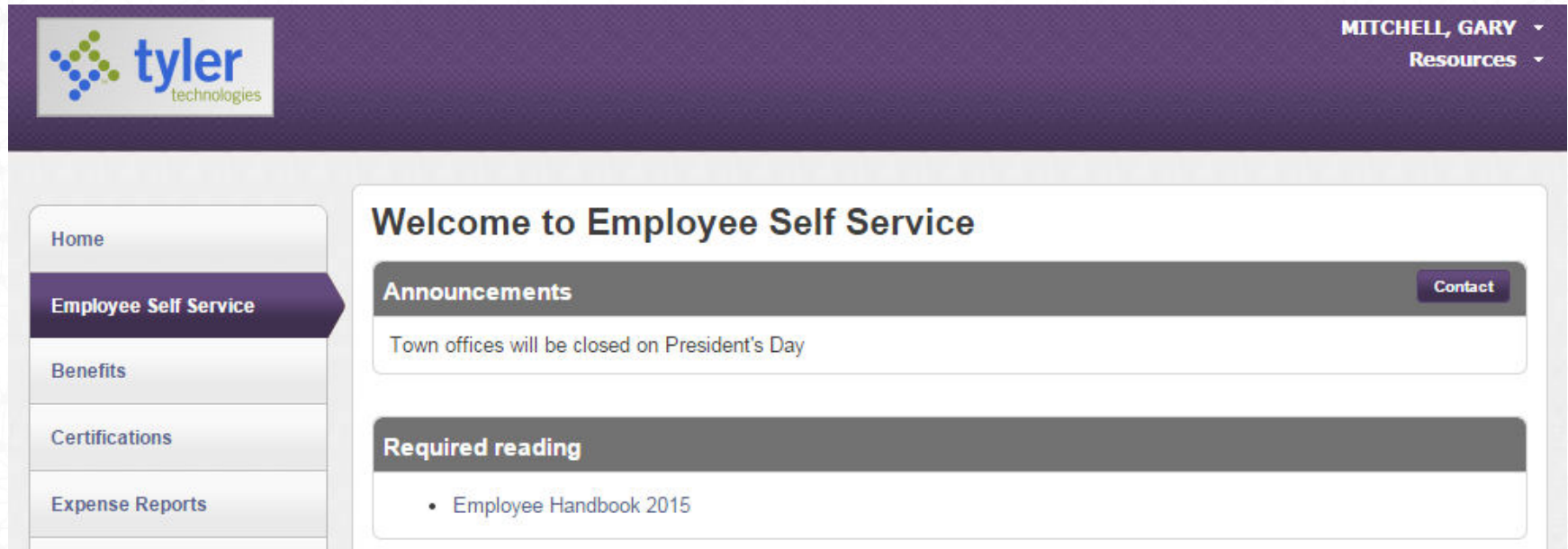
ESS Header Text for EMG CONTACTS TEMPLATE (Text can be found in pmacsst program)

Template Fields

Field Code	Required	ESS Display	ESS Default
Emergency Contacts Name	<input checked="" type="checkbox"/>	Name	
Emergency Contacts Relationship	<input checked="" type="checkbox"/>	Relationship Code	
Emergency Contacts Telephone	<input type="checkbox"/>	Contact Phone	
Emergency Contacts Comment	<input checked="" type="checkbox"/>	Comments Field	
Emergency Contacts Address Line 1	<input type="checkbox"/>	Line 1	
Emergency Contacts Address Line 2	<input type="checkbox"/>	Line 2	
Emergency Contacts Address City	<input type="checkbox"/>	City Field	
Emergency Contacts Address State	<input type="checkbox"/>	Contact State	
Emergency Contacts Address ZIP Code	<input checked="" type="checkbox"/>	Required ZIP	



# ESS – Document Acknowledgement



The screenshot displays the Tyler Technologies Employee Self Service (ESS) portal. The header is dark purple with the Tyler Technologies logo on the left and the user name 'MITCHELL, GARY' with a dropdown arrow and a 'Resources' link on the right. A left-hand navigation menu contains links for 'Home', 'Employee Self Service' (highlighted with a purple arrow), 'Benefits', 'Certifications', and 'Expense Reports'. The main content area is titled 'Welcome to Employee Self Service'. It features two sections: 'Announcements' with a 'Contact' button and a message about town offices being closed on President's Day, and 'Required reading' with a bullet point for 'Employee Handbook 2015'.

**tyler technologies**

MITCHELL, GARY ▾  
Resources ▾

Home  
Employee Self Service  
Benefits  
Certifications  
Expense Reports

## Welcome to Employee Self Service

**Announcements** [Contact](#)

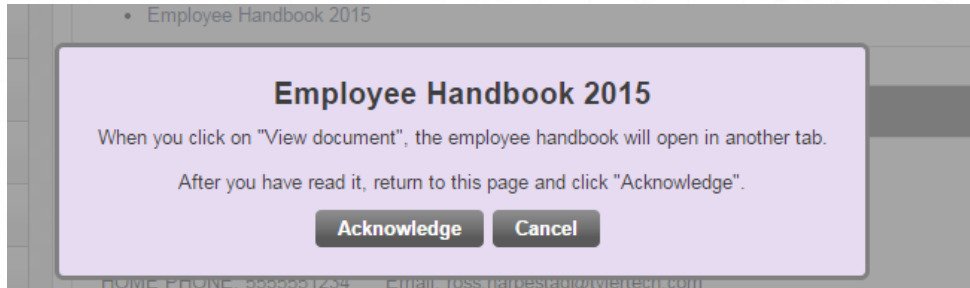
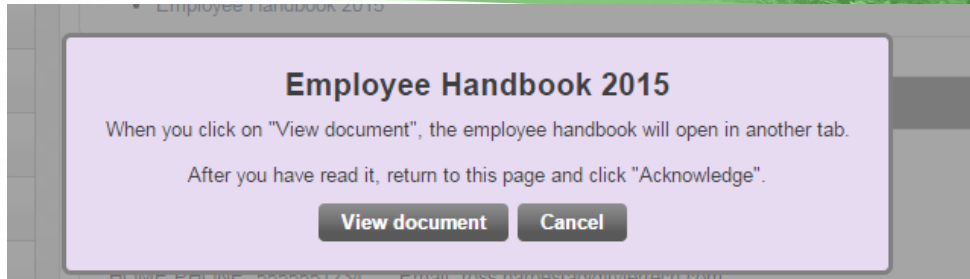
Town offices will be closed on President's Day

**Required reading**

- Employee Handbook 2015

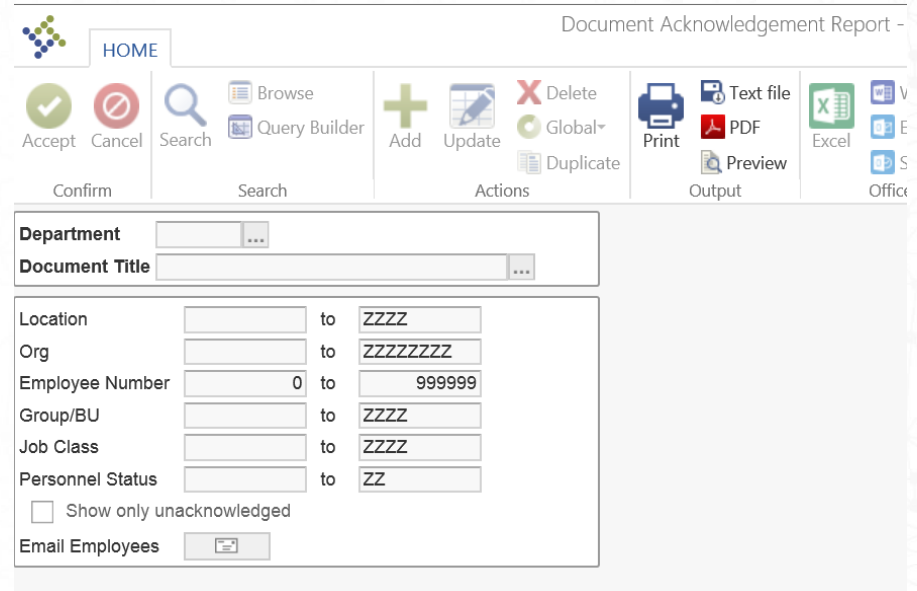
# ESS – Document Acknowledgement

- Clicking on the document will show you this prompt which will give you a chance to view the doc.
- After you have read the doc, return back to Acknowledge the doc.



# ESS – Document Acknowledgement

- The document is first uploaded in ESS.
- New program allows for defining the document and who should receive the document.
- A program is also available that will create a record for each employee and allows for the individual tracking and receipt of the document.



The screenshot displays the 'Document Acknowledgement Report' interface. At the top, there is a 'HOME' tab and a navigation bar with icons for 'Accept', 'Cancel', 'Search', 'Browse', 'Query Builder', 'Add', 'Update', 'Delete', 'Global', 'Duplicate', 'Print', 'Text file', 'PDF', 'Excel', 'Preview', and 'Office'. Below the navigation bar, there are input fields for 'Department' and 'Document Title'. A section for filters includes fields for 'Location', 'Org', 'Employee Number', 'Group/BU', 'Job Class', and 'Personnel Status', each with a 'to' value. There is also a checkbox for 'Show only unacknowledged' and an 'Email Employees' button.

Document Acknowledgement Report -

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print Text file PDF Excel Preview Office

Confirm Search Actions Output

Department [ ] ...

Document Title [ ] ...

Location [ ] to [ZZZZ]

Org [ ] to [ZZZZZZZZ]

Employee Number [0] to [999999]

Group/BU [ ] to [ZZZZ]

Job Class [ ] to [ZZZZ]

Personnel Status [ ] to [ZZ]

☐ Show only unacknowledged

Email Employees [ ]

# Additional HR Development

Mark Morrill, HR Development Manager

Ryan Libby, HR Development Supervisor

# Shared Calendars

- Accrual requests will automatically route to a shared calendar

Shared Calendars - Munis

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print PDF Preview Excel Word Email Attach Notes Audit Maplink Alerts Return

Code: VAC  
Description: LOCATION PLEX VACATION  
E-mail Addr: MUNIS@TYLERTECH.COM

**Accrual Types**

1 - VACATION LONG DESCRIPTION CODE
------------------------------------

**Job Classes**

From	To
------	----

**Locations**

From	To
PLEX	PLEX

**Groups/BUs**

From	To
------	----

1 of 1 Record(s) added.



# Shared Calendars

Microsoft  
Outlook Web App

sign out | inspector2

Calendar > March, 2015

< February 2015 >  
S M T W T F S  
1 2 3 4 5 6 7  
8 9 10 11 12 13 14  
15 16 17 18 19 20 21  
22 23 24 25 26 27 28  
1 2 3 4 5 6 7  
8 9 10 11 12 13 14

My Calendars  
☒ Calendar

New Delete Go to Today Share View

< > 3 tuesday  
Accrual Request for INSPECTOR2@TYLERTECH.COM; inspector2

8 AM  
9 AM  
10 AM  
11 AM  
12 PM  
1 PM  
2 PM

Accrual Request for INSPECTOR2@TYLERTECH.COM

inspector2

Required: inspector2  
Accepted: No attendees have accepted.  
Tentative: No attendees marked their acceptance Tentative.  
Declined: No attendees have declined.

Sent: Friday, February 27, 2015 12:58 PM

Tuesday, March 03, 2015, 12:00 AM to Wednesday, March 04, 2015, 12:00 AM.

Where:  
• No responses have been received for this meeting.


☐ Reminder: 15 minutes Show time as: Free ☐ Private

Pending: 8.00, Earned: 8.00, Comment: 8 HOURS OF VACA REQUESTED , Reason: VAC  
Period: C



# Beneficiaries as a Trust

Employee	SSN	Last Name	First Name
363 ...	365-22-2522	DAZE	RENE

Beneficiary	
Type	TRST - TRUST BENEFICIARY 
Trust/Organization	CHILDREN'S CHARITY TRUST
Last Name	JENSEN
First Name	JANE
MI	
Suffix	

Tax Id	
SSN	456-45-6511
Date of Birth	11/02/1974 
Gender	F - FEMALE 

Address	
Line 1	34 POOL SHARK BLVD
Line 2	APT 1
City	LOS ANGELES
State	CA
Zip	90355 ...

# Additional HR

- Personnel Actions Restart – when a change is made after workflow has been started, a new setting will allow for prompt to restart the workflow.
- Project Ledger additions to various programs.
- Removal of “Old” Applicant Tracking.
- Removal of PRMAIN menu structure in favor of HRMAIN.

THE JOURNEY CONTINUES  
**CONNECTATL**  
MAY 3-6, 2015

Remember to complete your class survey

Surveys may be accessed from your schedule  
on your mobile device

OR

Hardcopies are available at the  
Information Desk

