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## eP First Quarter Review

Can you believe that three months have already passed since the implementation of ePersonality? Time flies!

So much has changed since the first payroll after go-live:

- ❖ New reports have been added in Discoverer Viewer
- ❖ Many issues have been identified and resolved
- ❖ Process instructions have been streamlined
- ❖ and so much more!

We know that many of you are still identifying areas that need to be corrected and we appreciate your patience as we work through them.

In this issue of the newsletter, we will update you on our plans for launching the Employee Self Service module, as well as an overview of some of the changes we have made since go-live.

Speaking of changes, as we move into the next quarter, the frequency of the messages you receive from me will be reduced. I'll continue to notify you when the system is going to be down for maintenance, or when we are having technical difficulties, but all other communications about the system will be held and sent once per pay period. Please make sure you read the messages and stay informed!

As always, feel free to contact me with any questions or concerns or just to share your enthusiasm.

*Written by: Janell Crane  
HRMS Change Manager*

**"Great works are performed not by strength, but by perseverance."  
- Dr Samuel Johnson**



## Coming This Spring!

### Employee Self Service

The Employee Self Service module will be deployed this spring. Through this module, employees will have access to their employment information at any time, day or night. All they need is a computer with internet access, their last name, employee ID number, and ePersonality password to login. We will begin distributing the ePersonality passwords at the end of April.

Using Self Service, employees will be able to view their pay information, tax filing status, pay details, leave balances, and work assignment details including their job class, bargaining unit, union membership, job title, and scale rate.

Employees will also be able to update their personal contact information including their home address, mailing address, telephone number and personal email address.

We're inviting Payroll Clerks to participate in a demonstration of the Employee Self Service module. Please see the list of options below and register through SCORS. PQATT's attending the monthly meeting on April 8<sup>th</sup> need not attend as a self-service demonstration will be provided during that meeting.



### Self-Service Demonstrations

Register today to attend one of the Employee Self Service demonstrations listed below!

When	Where	Register through SCORS
April 21 <sup>st</sup> 9:30 - 11:30	HRMS Training Room	<a href="#">HRT-0677</a> - Access code 5555
April 21 <sup>st</sup> 1:30 - 3:30	HRMS Training Room	<a href="#">HRT-0678</a> - Access code 5555
April 22 <sup>nd</sup> 9:30 - 11:30	HRMS Training Room	<a href="#">HRT-0679</a> - Access code 5555
April 22 <sup>nd</sup> 1:30 - 3:30	HRMS Training Room	<a href="#">HRT-0680</a> - Access code 5555



## Quick Steps

We've added a new Library to the End-User Share Point site with "Quick Step" process instructions.

These instructions are at a higher level than the regular process instructions. If you feel comfortable with the how to fill in the fields for the various processes and you just want a quick reminder of the fields that you need to review and update, these are the instructions for you.

Each set of Quick Steps will link to the more detailed instructions. So, if you need more detail, it's just a click away.

We've completed most of the Quick Steps with just a few left to finish. When you get a chance, check them out (just click on the link below).

### [Quick Steps](#)

Please make sure that you're using instructions as you make changes in ePersonality. This helps to reduce the re-work required if a change was processed incorrectly.

## Important Updates

### Status of Labor Data

- The January 5<sup>th</sup> and January 19<sup>th</sup> pay date spreadsheets have been corrected and replaced on Report 2 Web. **Thank you for your patience!**
- The Discoverer Viewer labor reports have been reposted and are available for your review. Instructions are on page 5.
- We are in the process of creating labor reports with month to date, quarter to date, and year to date data. I'll let you know as soon as they have been posted.

### Termination Process

- The instructions for the termination process have been updated to reflect the recent changes that Kim Murphy sent you last week. Please make sure to review these instructions before processing any terminations.
  - [Termination Process.doc](#)

### Address Changes

- The issue with address changes sticking in ePersonality has been resolved. Beginning April 11<sup>th</sup>, Payroll Clerks should make address changes in IEPI. Please **discontinue** sending address changes to Central Payroll.
  - [Maintain Personal Information.doc](#)

### Changing your Password in eP

- We are still working with the vendor to address the issue we are having with changing passwords. Please do not attempt to change your password in ePersonality until we notify you that the issue is resolved.



## Reports Available in Discoverer

Many reports have been added to Discoverer Viewer. Below is a list of the reports that are currently available to departments. Please check Discoverer Viewer regularly for new reports.

### Human Resources Reports:

- Employee Alpha by PR Department-Section
- Employee Assignment Details
- Employee Paid Leave Bank Balances
- Hours Tracking:
  - Extra-Help Employees by Department and Supervisor
  - Merit
  - Probationary Employees by Department and Supervisor
  - Probationary Employees Nearing Completion of Probationary Period
- Job Classification Master List by A step Hrly Rate
- Leaves:
  - 13 Pay Period Leave Benefit Tracking
  - Current List of Employees on Leave
- Map of Budget Dept to eP Dept Code
- Multiple Assignments Report (Incl Temp Promotions)
- New Hires
- Position Allocations Summary
  - by County Dept\_Agency – # Filled and Vacant
  - by County Dept and JC – # Filled and Vacant
  - eP Dept (PR Dept-Sect) – Filled and Vacant
  - by Index – Filled and Vacant
  - by Program – Filled and Vacant
  - Substitutes, Underfills and Dual Fills
  - With End Dates
- Premiums:
  - All Position Level
  - Excludes Cash Allowance
  - Filter by Premium
  - Position Level – Base Wage Premium Job Classes Only
  - Position Level on Assignment Records
  - Time-Hours by Pay Date
- Terminations

### Payroll Reports:

- Gross to Net
- Labor
- Payroll Time Report (PTR)



Discoverer Viewer



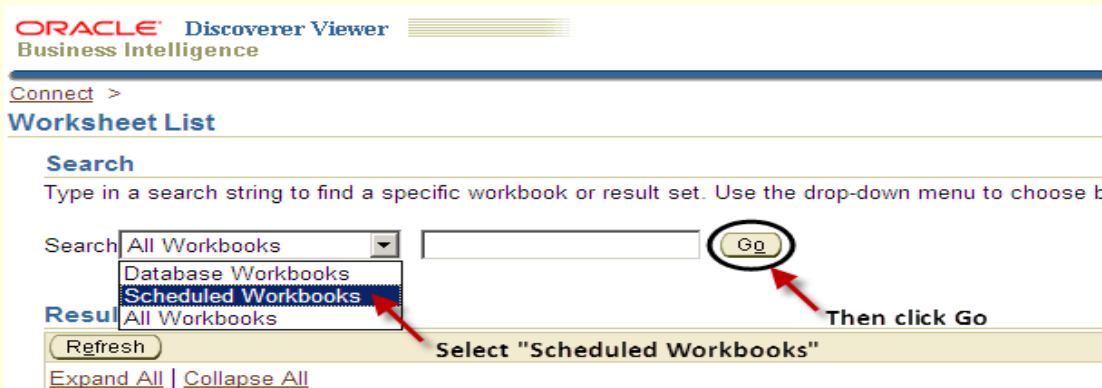
# HRMS Newsletter

April 6, 2011

## Instructions for Running Discoverer Viewer Labor Reports

The labor reports have been re-posted to Discoverer Viewer beginning with the January 5, 2011 pay date.

When you log in to Discoverer, a list of workbooks will display. In the search field, select "Scheduled Workbooks" and click "Go".



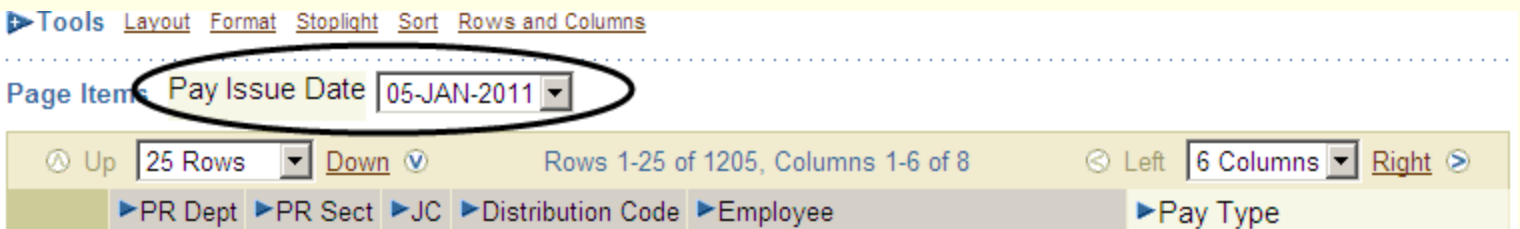
A list of scheduled workbooks will display. The labor reports are titled "Labor Distribution Current Earnings". Click on the arrow (▶) next to the report and a list of workbooks with the date they were last modified will be displayed.

▶	Labor Distribution Current Earnings - HRD		DISCSCHEDMGR	Friday, April 1, 2011 03:51:01 PM PDT
▶	Labor Distribution Current Earnings - HRD	Each workbook contains worksheets for a specific pay date. The reports were run in order, so the first workbook dated April 1, 2011 3:51 PM contains the worksheets for the January 5, 2011 pay date.		Friday, April 1, 2011 03:52:02 PM PDT
▶	Labor Distribution Current Earnings - HRD			Friday, April 1, 2011 04:37:06 PM PDT
▶	Labor Distribution Current Earnings - HRD			Monday, April 4, 2011 08:28:24 AM PDT
▶	Labor Distribution Current Earnings - HRD			Monday, April 4, 2011 10:15:15 AM PDT
▶	Labor Distribution Current Earnings - HRD			Monday, April 4, 2011 11:48:56 AM PDT
▶	Labor Distribution Current Earnings - HRD			Monday, April 4, 2011 12:25:18 PM PDT
▶	Labor Distribution Current Earnings - HRD			Monday, April 4, 2011 01:24:34 PM PDT

Click on the arrow (▶) next to the workbook you want to view and a list of worksheets will display.



To verify the pay issue date for the worksheet selected, click on one of the worksheets to run the report. The pay issue date is displayed just above the report as shown below:

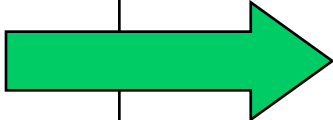







# HRMS Newsletter

April 6, 2011

## Payroll Clerk Schedule

Monday	Tuesday	Wednesday	Thursday	Friday
Pay Week	Pay Week	Pay Date	Pay Week	Pay Week
	<b>Employee Assignment Changes</b> <b>New Hires</b> <b>Merit Hour Adjustments</b> <b>Vacation In-Service Hours Adjustments</b> <b>Update Personal Information</b> <b>Update EE Contacts</b> <b>Update Aliases</b> <b>Update Employment Information</b> <b>Benefit Election and New Enrollments</b> <b>Process Premium Changes</b> <b>Process Terminations</b> <b>Update Leaves</b>			
Payroll Processing Week	Payroll Processing Week	Payroll Processing Week	Payroll Processing Week	Payroll Processing Week
*Pay Period Ends	*Pay Period Begins			
	1. Timecards 2. Review Employees w/ Multiple Assignments (labor level 2) 3. Sign-Off Timecards	1. TimeSaver Adjustments 2. Final Sign-Off		
				
<b>No Changes in ePersonality</b>				