

HEUG 2001

STREAMLINING DATA INPUT FOR HRMS USING ROBOT

Session Number 1027

presented by

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What we faced:

- ⇒ Volume of casual payroll at the University of Waterloo doubled in past two years and will continue to grow
- ⇒ Source documents paper-based
- ⇒ Data lookup and entry done manually
- ⇒ Limited resources in HR to enter data



What we needed:

- ⇒ An electronic solution
- ⇒ Technical development using Rational Robot software
- ⇒ Data entry at source
- ⇒ An input program available to majority of administrators on campus.

Rational Robot:

- ↑ Is a suite of tools which is designed to help with automated testing.
- ↑ We used the basic tools as delivered with PeopleSoft.
- ↑ Robot records scripts that recognize PeopleSoft HRMS panels
- ↑ These allow a user to take input from a file (such as an EXCEL worksheet) and “uploads” it to PeopleSoft panel
- ↑ Preliminary testing to see if it would work for UW’s casual payroll

Committee formed to investigate the issues:

Consisted of four people:

- ↓ An Information Systems and Technology developer
- ↓ An Executive Assistant from a Faculty
- ↓ Two Human Resources staff

Concerns Expressed:

Audit Perspective:

- ↓ How to ensure that the correct employee was paid (e.g., if an ID number was input incorrectly?)
- ↓ How would authorizing signatures be captured?

Audit Solutions:

- ⇒ Match on the last name and ID number, so the record would only process if there was an exact match
- ⇒ Copy of the Excel spreadsheet must be signed by authorized person

Concerns Expressed (Cont'd):

Security Perspective:

- ⇒ Sending files via email attachments not a secure method
- ⇒ Needed a way to acknowledge receipt of documents

Security Solutions:

- ⇒ Using servers on campus allowed us to “pull the data” from a secure environment.
- ⇒ Further development being done to set up a secure website for user authentication

Advantages:

- ⇒ Use of an Excel template as the data entry program allowed minimal training of campus staff; already on most desktops.
- ⇒ Time saving for HR eliminating manual lookup and data entry for each transaction
- ⇒ Entry at department level would mean a more accurate payroll; upload to PeopleSoft directly from the template.
- ⇒ Less data transposition
- ⇒ Use of Excel functionality created huge time savings.

Testing, testing, testing....

- ⇒ We tested the preliminary program in March, 2000 in a test environment.
- ⇒ Added some columns to the spreadsheet to display messages when program had finished.

Sample Messages:

- ⇒ ID and name (Smith) don't match
- ⇒ Both hours and amount are entered
- ⇒ PROCESSED: The one we want to see!

Testing (cont'd)

- ↑ Ran test with actual data from pilot group on campus (n=200) in our test instance and compared to the production data (manually input).
- ↑ Worked out the “glitches” and refined the program; then uploaded the data in production
- ↑ Began introducing it to other departments with large numbers of casual staff
- ↑ Rolled it out to campus February, 2001

Procedures:

- ⇒ Designated Human Resources staff member pulls files from the server
- ⇒ Place files in designated drive: “Incoming” folder
- ⇒ When file is processed, save it in “Processed” folder
- ⇒ Print a copy of the processed sheet for balancing (with calculated totals)
- ⇒ Keep a log of processed files, errors found, corrected and re-run
- ⇒ The file can be re-processed multiple times.

Demonstration:

- ⇒ Open the SQA Robot software, type in password and click on “Play”
- ⇒ Type name of the file you want to process
- ⇒ Watch the first few transactions to ensure that the program is working
- ⇒ Go back to your desk and do other work while Robot is loading the data

Excel Template Example:

Pay End Date: March 23, 2001

Emplid	Surname	First name	Code	Hours	Rate	Amount	Acct.	Auto. Data Entry			
								Code	Amount	Status	Comments
100706	Jones	Jenny		6.00	9.00	2498	VP	2.16			
100706	Jones	Jenny		10.00	6.85	5513	VP	2.74			
103832	Smith	Ricki		25.00	10.00	2498	VP	10.00			
103833	Smith	Ricki		5.25	10.00	2498	VP	2.10			
123456	Mouse	Mickey	CON			500.00	1234				
456789	Mouse	Minnie	FEE			1,000.00	45678				

File Tools Options Admin Window Help



SQBasic Language

Enter the full pathname to the spreadsheet:

a:\demo.xls

OK Cancel

ports 1 Reports 2 Help

OK Cancel



Test Procedure FEDSPAY Started Running



HRFF

Processed Excel Template:

Pay End Date: March 23, 2001

Emplid	Surname	First name	Code	Hours	Rate	Amount	Acct.	Auto. Data Entry			
								Code	Amount	Status	Comments
100706	Jones	Jenny		6.00	9.00		2498	VP	2.16	Processed	
100706	Jones	Jenny		10.00	6.85		5513	VP	2.74	Processed	
103832	Smith	Ricki		25.00	10.00		2498	VP	10.00	Processed	
103833	Smith	Ricki		5.25	10.00		2498	VP	2.10	Rejected	ID and Name (Smith) do not match
123456	Mouse	Mickey	CON			500.00	1234			Processed	
456789	Mouse	Minnie	FEE			1,000.00	45678			Processed	
Paylines entered 10:11:56 AM 03/28/01											

Reactions from campus community:

- ⇒ **Very positive feedback!**
- ⇒ Less work for departments to prepare payroll data (no more manual forms)
- ⇒ Administrators find the Excel template easy to use
- ⇒ Allows UW to stay with a biweekly casual payroll
- ⇒ Allows Human Resources to focus on client service

What next?

Explore the use of Robot to:

- ⇒ pay term employees, e.g. Graduate Students and Temporary employees (Additional Pay panel)
- ⇒ enter large amounts of data on other PeopleSoft panels
- ↑ do automated, generic tax update testing.

What has Robot done for University of Waterloo?

- ⇒ Eliminates manual lookup and data entry in Human Resources for casual payroll
- ⇒ Allows us more communication with administrative assistants to understand our respective concerns (incomplete data, timeliness, valid account numbers)

What Robot has done (cont'd):

- ⇒ Allows Human Resources staff to learn more about and use Excel's functionality (e.g. formulae, VLOOKUP)
- ⇒ Can "input" the payroll in much less time (about 30 seconds per transaction)
- ⇒ Produces a more accurate payroll for casual employees
- ⇒ Moves us into the 21st Century...



Acknowledgements:

- ↓ Fred Widall, IST (developed the program)
- ↓ Kevin Scully, IST (set up the servers to transfer data)
- ↓ Alice Pelkman, Human Resources (tested the program)
- ↓ Carol Kube, Human Resources, helping to roll out to campus and running the program on a biweekly basis.

The image features a background of light-colored marbled paper with intricate, swirling patterns in shades of beige, cream, and light brown. A large, white rectangular frame is centered on the page, containing the text. The frame has a thin black border and a small white tab-like protrusion on its left side.

Questions?

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