Distribution Entry Improvements Fall 2019

Effective Fall 2019, improvements to Payroll Accounting screens will be available within HR PeopleSoft. Enhancements include improved search functionality, consistency of funding level pages, and added detail on additional pay.

Log in to MyU (myu.umn.edu). Navigate to: Key Links > PeopleSoft > Human Resources.

Navigate in HRMS: UM Payroll Accounting > UM Payroll Accounting > UM Distribution Entry.

IMPROVED SEARCH AND DISPLAY FEATURES

New search functionality allows the ability to search by distribution on a specific date within the fiscal year. Displayed results are streamlined and easier to read.

1. **Search By**: The radio buttons for department funding list and employee job summary have been replaced with a drop-down menu. Select “Department” or “Employee” to access distribution information.

2. **As Of**: This field allows you to view employee job data and distribution funding level as of a specific date within the fiscal year.

3. **Show Inactive Records?**: Available in Department view only. Check only to return inactive employee records in department distribution results.

4. **Name**: The name column has been split into *First Name* and *Last Name* to assist in sort and search functionality.

5. **Positions**: This section is available in Department view only. Identify a position to set up, or view position level distribution information.
Distribution Entry Improvements Fall 2019 (cont.)

FUNDING LEVEL PAGES

Improvements to funding level pages (Department, Position Pool, Position, Appointment) include:

- Changed all pages to pop-up windows that overlay the main search page, and standardized the action buttons (e.g., Save and Close). This allows for a consistent experience within all pages and improved use of the back button in Fluid navigation.
- Updated page titles for consistency across funding pages.
- Moved the effective date above all supplemental information.
- Applied warning message if updating a historical distribution (effective date in the past).

APPOINTMENT LEVEL FUNDING PAGE

The appointment level funding page accurately displays relevant job and additional pay details, associated to the distribution effective date.

1. View Dept Funding: Link moved into header to align with other department specific information.
2. **Effective Date:** The distribution effective date moved above Job Details section. The job details that display will be relative to the distribution effective date entered.

3. **Last Updated by:** Displays the Internet ID and date of the last time a distribution was changed. More historical information is available by viewing query UM_PA_AUDIT_DISTRIBUTIONS in Query Viewer.

4. **View More Job Details:** Click to view additional job information to use in determining if a new distribution change is needed.

5. **Primary Job Frng:** Displays the fringe group of the employee based on their primary job. This fringe rate is used to calculate the PP Fringe amounts in the Earnings Distribution section.

6. **View More Additional Pay:** Click to view all additional pay activity for the selected fiscal year.

7. **Additional Pay:** This section no longer displays future additional pay activity. It only displays active additional pay that is current to the distribution effective date. These additional pay amounts are included in the PP Earnings calculations based on earnings code and distribution percentages.

8. **Earnings Distribution:** Indentation and activating view all functionality were completed to help view multiple data levels within this section.
RESOLVED ISSUES

- An employee starting in a new fiscal year could not have distribution set up until the annual distribution rollover occurred. This is resolved, and distributions can be entered at any time.

- If an effective date was entered prior to the fiscal year, the system presented an error and updated the date to the first day of the fiscal year. However, in system tables, it stored the invalid date. This caused incorrect actual distribution. This is resolved, and the effective date must be corrected prior to saving the page.