



## Personnel Document Rollover

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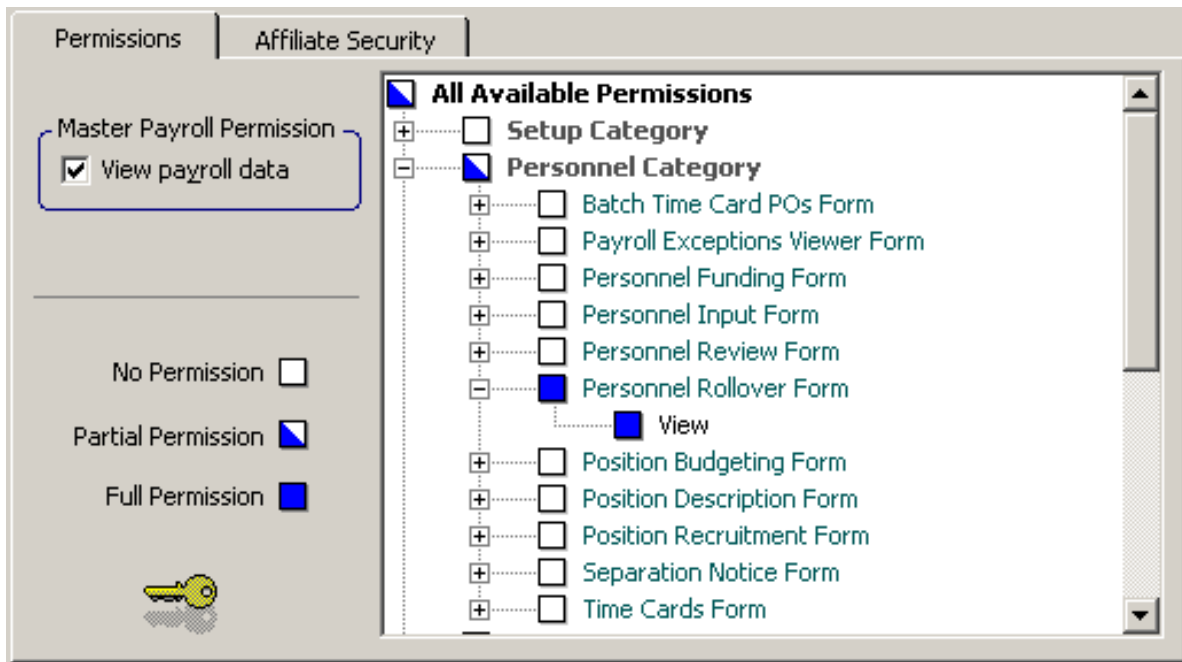


Figure 1: User Security Form

1. To give rights to Personnel Rollover functionality:
  - A. Click the **Setup** menu
  - B. Select Organizational Setup
  - C. Select User Security

Under the Personnel Category, expand **Personnel Rollover Form** and give rights to **View**.

# UNIVERSAL MANAGEMENT SYSTEM

## Document Eligibility

Personnel Funding

Affiliate **TEST** Status **Approved**

Pay Type **Standard**

Employee **Chris Brown** Employee Detail...

Social

Inactive

Retro

Action **Reclassification**

Entered **07/01/2004** Pay Cycle **Monthly**

Period Begin **07/01/2004** Period End **06/30/2005**

Ref Num

Memo

Auto-Renew

Organization: Big State University

Payroll Items | Funding | Mission Codes | Approval/Routing | H.R. | Notes | Links

Pay Model **Staff** Annualized Salary **30,000.0000**

Pay Item	Rate	Qty	Period	Limit	% Modifier	Employer Cost	Expense Acct Obj	Funding
1 Staff	\$ 2500.0000		Monthly		100.00 %	\$ 30000.0000	500020 - Other Pe	<Split>
2 FICA	4.33 %					\$ 1299.0000	501990 - Fringe Be	<Split>

Add Item Delete Item Up Down Total Cost for Period **31,299.00**

Total Period Cost **31,299.00**  
Funding Total **31,299.00**

Help Save and Close Cancel

Auto-renew must be checked

The default pay model will be used for the new document. All rates and periods will default back to their original state.

Modifiers will remain the same

In order for a document to be eligible for rollover, the following term must be fulfilled:

1. The document must be active.
2. Auto-renew must be checked on the personnel funding document.

Rolling a document over will have the following effects:

1. It will use the same pay model. However, if any of the pay items, percentages, or pay periods in the model have been changed, they will go back to their original state. Any modifiers will remain the same.
2. It will use the same funding centers and funding percentages as the original document.
3. It will go through all approval groups before being marked as approved (unless otherwise specified—see page 4 for details).
4. Mission codes will carry over.
5. HR Information (Position, Recruitment, etc) will carry over.
6. Commitments will not carry over.
7. Auto-renew will be checked on the new documents.

# UNIVERSAL MANAGEMENT SYSTEM

## Document Rollover

Please choose all the Personnel Funding documents that you wish to rollover at this time. Note that only standard Personnel Funding documents that are marked as auto-renew will show up in the grid below.

Show documents with center: 555-61125, Personnel Rollover C... All

Show documents which expire by: 06/30/2005

Set all begin dates to: Choose Set Set all end dates to: Choose Set

Inactivate documents when they successfully roll over

Zero out remaining commitments when documents successfully roll over

Apply an across the board pay increase of %

Change the pay action to

Bypass UMS approval process for new documents

Last Name	First Name	SSN	Affiliate	End Date	New Begin	New End	
<input checked="" type="checkbox"/>	Davis	John	202-09-2092	TEST	06/30/2005	07/01/2005	06/30/2006
<input checked="" type="checkbox"/>	Brown	Chris	- - -	TEST	06/30/2005	07/01/2005	06/30/2006

Select All UnSelect All Help Rollover Close

If all new begin and end dates are the same, set them using these date boxes. Otherwise, set the new dates by typing directly into the New Begin and New End fields.

All eligible personnel documents will be displayed here.

Complete the following steps to rollover the documents:

1. Click the **Personnel** menu
2. Select **Personnel Rollover**: All documents that are eligible for rollover and expire by the date set at the top of the rollover form will be displayed.
3. Select the documents to be rolled over by checking the box beside the employee name. If all documents should be selected, click Select All. If the new begin and end dates are different from the ones shown in the New Begin or New End columns, either type directly into the Begin Date and End Date fields, or if all the documents should have the same begin and end dates, set them using the date boxes at the top of the form.
4. To inactivate the old personnel funding documents, check the box labeled "Inactivate documents when they successfully roll over". To zero out the remaining commitments on these inactivated documents, check the box labeled "Zero out remaining commitments when documents successfully roll over".
5. If ALL documents being rolled over should have a pay increase applied to them, check the box labeled "Apply an across the board pay increase of..." and put the percentage of the pay increase in the % box.
6. To set the pay action for all documents that are rolled over, click the "Change the pay action to..." checkbox and select the appropriate pay action from the drop down menu.
7. If the newly rolled over documents should not go through the UMS approval process (i.e. they should be automatically approved), check the "Bypass UMS approval process for new documents" checkbox.
8. Click **Rollover**.

A report will display the status of the funding documents. If the document did not rollover, a reason will be supplied. Once the problem has been corrected, the document can then be rolled over.

Personnel Funding Rollover Detail Report				
Person	Affiliate	Begin Date	End Date	Exception Reason
The following personnel funding documents were renewed				
Sample Person 1	SAFF	7/1/03	6/30/04	
The following personnel funding documents were not renewed				
Sample Person 2	SAFF	7/1/03	6/30/04	Your budget center does not have available funds for this transaction.
Sample Person 3	SAFF	7/1/03	6/30/04	The end date of your budget comes before the thru date specified.