

Directory Information Panels and Process

The panels provided will allow departmental timekeepers the ability to directly change the following fields for all of their employees in the HR/Payroll system: Preferred Name, Home and Mailing Address and Phone Numbers, Work e-mail addresses, Work Phone, Office Room and Building, Working Title* and Preferred Department*.

You may also indicate to exclude a person from the annual phone directory print (see guidelines on page 7). Regular Faculty and Staff, Graduate Teaching (GTA) and Graduate Research Assistants (GRA) work information is included in the phone directory. All other temporary employees are not included in the phone directory.

These panels will be open year round and will update personal, position and job panels upon saving. This will also feed to the Exchange system for updating the “Outlook” people address book every Monday through Friday morning.

As of the Fall 2011 Directory – employee’s home or mailing phone or address will not be included in the printed phone book.

Who has access to what?

Departmental Timekeepers have access for the employees in which they “own” the position. The Payroll Office and designated staff in Human Resources & Equal Opportunity (HR/EO) have campus wide access. You would use your departmental designated sign for access to these panels.

What documentation is required?

When an employee’s home or mailing address is changed, the employee’s signature or an email from him/her (their email address) is to be used for his/her authorization of the change and should be kept in the departmental file. A signature line is provided on the individual report for this purpose. It is generally a good business practice to have something on file authorizing other directory changes, but it is required for addresses. This documentation should be kept until the first of March following the end of a calendar year (for W2 issues).

What about reports?

We have created 2 types of reports 1) you can run a page per employee to hand out for him/her to verify and indicate changes, 2) we also have a overall departmental report that can be extracted into excel.

When is this to be done?

You should update the panels whenever you are made aware of a change and have the appropriate documentation. The Exchange (on-line) directory is updated once a day every Monday through Friday. The deadline for the KU phone (paper) directory will be established each year. A HRIS-L (HR/Pay list serve) message will be sent out, generally the date is in early September.

* Working Titles and Preferred Departmental Names are subject to HR/EO approval and are only to be entered if different than the official Job Code and Department Name.

Go, Administer Workforce, Administer Workforce (US), Use, KU Directories

Update/Display -- KU Directories

EmplID:

Name:

Last Name:

Department SetID:

Department:

National ID:

In | Empl Rcd# | Name

Search Box – Same as on the other panels – use 1 option

EmplID: Enter employee ID.

Name: Format is LastName Suffix, FName MName – or a portion of this - Case sensitive.

Last Name: You can only enter the Last Name and Suffix – or a portion of it.

Department – Enter your full 7 digit department number (true HR Position Department).

If you need to search for your Department Number you must fill out the **Department SetID** which is UKANS.

National ID: Enter the Social Security Number.

If you are searching on this panel by the Department you will see everyone who is currently active as well as those who have terminated from the university and their last employee record was in your department. This is using the Personal Data Search which does not have employee status. Only those with positions on the KU Directories, Position Information Panel will be included in the directories as this search uses Job Data employee status.

When you are done entering changes VERIFY first and then don't forget to Save by clicking on the floppy disk icon (menu bar on the top left) or use the enter key.

Administer Workforce (US) - Use - KU Directories

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

Directory Choices | Pref. Name/Address | Position Info

Burkhead, Madeline A ID: 1888888

| Personal Selections for Directory | Defaults |
|-------------------------------------|--|
| Omit this person from the directory | <input checked="" type="radio"/> No <input type="radio"/> Yes (If leaving KU, or Affiliate Request) |
| Print personal address | <input checked="" type="radio"/> Home <input type="radio"/> Mailing <input type="radio"/> Do Not Print |
| Print personal phone | <input checked="" type="radio"/> Home <input type="radio"/> Mailing <input type="radio"/> Do Not Print |

The options on this panel only apply to the **annual paper printed** phone directory.

To change options, click on another radio button.

Omit this person from the directory: The default is set to No. This option should only be selected under certain circumstances; see page 7.

Print personal address/phone: * This option will no longer be used as of the Fall 2011 directory no home or personal address or phone will be printed. No personal address or phone information is sent to the Exchange on-line directory.

Administer Workforce (US) - Use - KU Directories

File Edit View Go Favorites Use Setup Process Inquire Report Reports Help

Directory Choices Pref. Name/Address Position Info

Burkhead, Madeline A ID: 1888888

Preferred Name

| Eff Date | First | Middle | Last |
|------------|---------|--------|----------|
| 11/06/2008 | Mad Dog | | Burkhead |

Addresses Effective 04/01/2004

Home Address

Country: USA United States
 Address 1: 123 Dog Lane
 Address 2:
 Address 3:
 City: Baldwin City
 State: KS Kansas Postal: 66006
 County: DG Douglas

Mailing Address

USA
 456 Fenced Yard
 Lawrence
 KS 66044
 DG Douglas

Edit Mailing Address

TR05 Preferred Name/Address KU

To insert a row you need to be in one of the effective dated fields and you can do an F7 or select insert row from the menu bar.

Once you save a row, it's done and it "feeds" into the various other panels.

Effective Dates: Generally changes should be made effective the date of your entry. There may be rare cases that you might put in a future date for an address change, but preferred names and position information should not be made with past or future dates.

Preferred Name: Insert row in Eff Date. This is case sensitive, please do not type in all caps or put names in () or remove the last/first name (unless the person does not have a first name). If you want to take out the middle name – you need to use the delete key.

Home Address: Insert row in Addresses Effective. Please note the effective date is to the top right of the Home Address field. The second and third address are not used by the postal service. This is used for the W2 mailings and impacts paycheck and advice mailings, please be sure it is correct before saving. Everyone is required to have a home address.

Mailing Address Insert row in Addresses Effective. Click on the Edit Mailing Address button and the panel below will open up. Follow the guidelines for Home Values.

This is only used if different than Home – generally for those who have their Home/W2 address sent to a more permanent address and this is used for the local address in the cases of students or temporary faculty. May be used for paycheck mailing, please be sure correct before saving.

Postal Address

Country: USA United States
 Address 1:
 Address 2:
 Address 3:
 City:
 State: Postal:
 County:

OK Cancel

Postal: Zip Code – enter the 5 or 9 digits without the dash. Upon entry it will populate the City and State and County. This is done through software purchased from the U. S. Postal Office.

City: Only change if different in some cases from the loaded value from entering the postal code.

State: You should not have to change this.

County: No changes are to be made to this. For benefits eligible employees this does have an impact on availability of health insurance plans. Defaults as needed from postal code.

ZZ is set up as a default for counties that we are not to report to SHaRP – the state's HR/Payroll system.

Terrier, Madeline Fox ID: 1351374

Note: for drop down selections, if value is not available, contact Human Resources.

Phone at Home Address: 785/842-9877
 Phone at Mail Address:
 Work Email Address (@ku.edu): maddogterrier@ku.edu

| Position | Office Phone | Room | Building | Related Description |
|--------------------------|-----------------|----------------|----------|------------------------|
| 00200596 | 785/864-7482 | 111 | C-0 | Carruth O'Leary - Lawr |
| Omit Posn From Directory | Project Manager | Working Title | S310 | Systems Admin |
| | Human Resources | Preferred Dept | | |

TR05 | Position Info KU | Update/Display

If the option you need for a building, working title or preferred department is not available, please send your request to hrinfosys@ku.edu.

Use ShiftF4 to bring up a search box.

If an employee has a work email address, office phone, room or building it is to be entered.

Phone: Must include the area code – when you tab out of the field it will format correctly once you enter the full 10 numbers. Everyone should have a work phone number – it may be a main office.

Work Email Address: you need to include the @ sign. Employees should have their @ku.edu address. Affiliates may use other email addresses.

Working Title: This may be audited by HR/EO.

Omit Posn from Directory: This option should be used if during the printed KU directory process an employee is leaving your department to take another position on campus or if a person has 2 positions and only wants one position listed in the directory. For transfers - you would only need to do this option if we are getting close to the deadline for the phone directory, and the transfer has not been completed. If the transfer is keyed in the HR/Payroll system by the directory deadline, we will extract the new position.

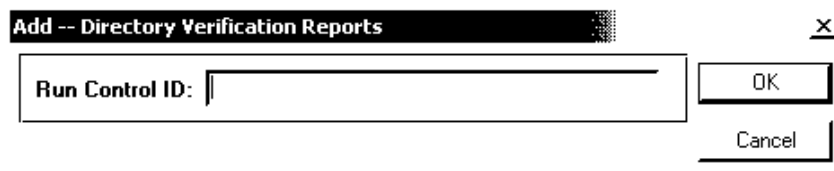
Room & Building: We need to have a building for each employee non affiliate. Room number is optional but will be shown in the paper directory, provided on mailing lists and is helpful for other systems.

For affiliates (e.g. retirees) if they do not have an office on campus please put in NA for their Building code and remove the Room. All active employees need a building location that is not NA.

When you are done entering changes on a person VERIFY ALL YOUR DATA and then don't forget to Save by clicking on the floppy disk icon (menu bar on the top left) or use the enter key before you close out. You don't have to save on each panel just when you are done with the employee. If an error is made, contact payroll@ku.edu. You can not make corrections, so please check your data before saving.

Reports

Go, Administer Workforce, Administer Workforce (US), Report, Directory Verification Report, (First Time is Add then Update/Display)



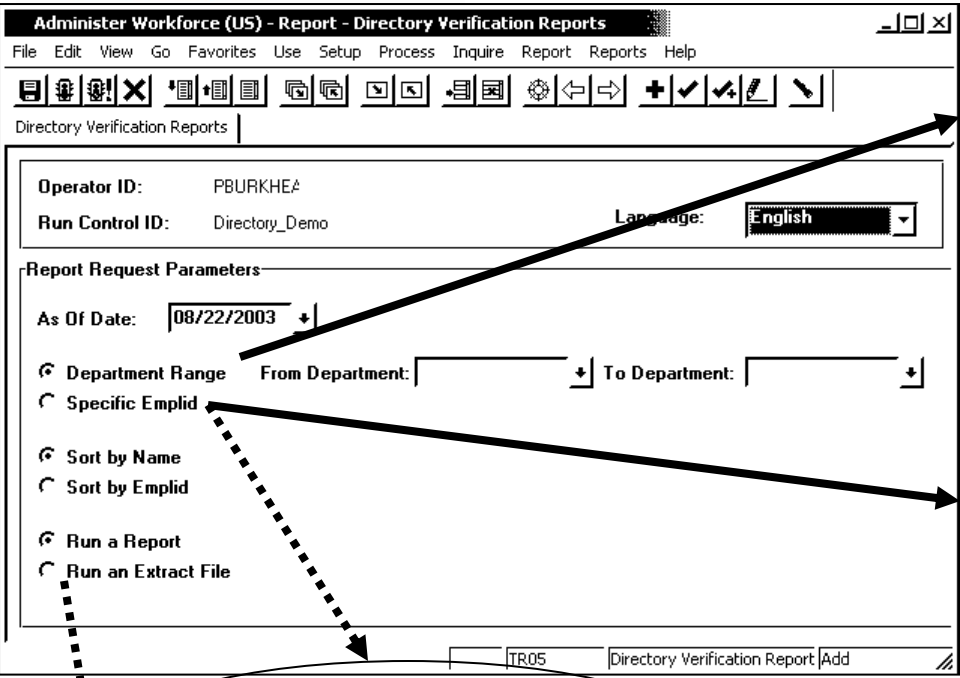
You will need to assign the

Run Control ID. This is unique to your sign on – you may use a mixture of alpha and numeric but no special characters, and it should be a should not be a Run Control ID name that you have used on other reports.

Some examples: Directory or Directory_Dept. See the Reports manual at <http://www.hreo.ku.edu/forms/files/reports.ppt> for more details on running reports.

You will be downloading confidential data such as home address and home phone. Please store this data securely and do not store on your hard drive or any unsecured disk.

Security Page: http://www.hreo.ku.edu/policies_procedures/category_details/20



As Of Date: Defaults to today’s date. If you put in future dated changes to have those show you would need to change this date.

Department Range: This option will either print a sheet or extract a listing of the data for each employee in the departments entered.

Selecting this option opens up the from/to department and un-grays the option of sorting.

From Department, To Department: Put in your “true hr position” department(s) - for many departments the “to” and “from” are the same.

Sort by Name or Sort by Emplid: Select option

Specific Emplid: This option will either print a sheet or extract a listing of the data for the Employee ID entered.

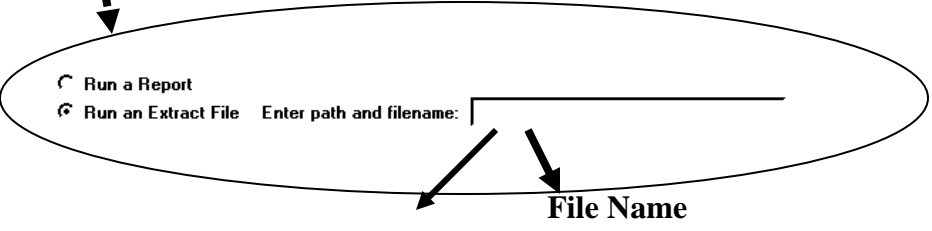
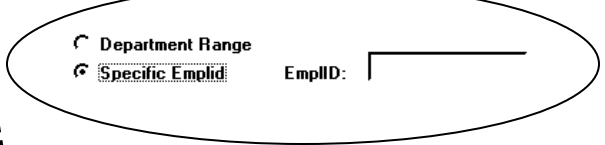
Selecting this option opens up the EmplID field and grays-out the sort options.

EmplID: Enter the full 7 digit Employee ID.

Both report options (**Department Range** or **EmplID**) can be run to paper or can create an extract file for loading into a file – most common is Excel.

Run a Report: This option will print one employee per page. This is designed for you to give to your employees to update and return for entry.

Run an Extract File: If you select this option a box will open to enter a path and file name. You will need to entered a secured drive/directory in the path & then give it a file name (not the c drive). Once the file has completed (SQR window goes away) the report is done. The extension will be .csv and you may open with Excel and import as comma delimited or open from the directory you saved the file into Excel. You may change the file name if you wish.



You should select a secured drive –It is unknown what drives you will have available. Do not keep HR/Pay data unsecured.

Select the first stoplight “Run” on the top menu bar



Example A – Run A Report

| | | |
|---|--|--------|
| Run Location <input checked="" type="radio"/> Client <input type="radio"/> Server Server: <input type="text"/> | Output Destination <input type="radio"/> File <input checked="" type="radio"/> Printer <input type="radio"/> Window File/Printer: <input type="text" value="lpt1"/> | OK |
| Run Date/Time: <input type="text"/> | Run Recurrence: <input type="text"/> | Cancel |

Run Location: Select “Client” always
Output Destination: This will depend upon your prior selection.
Printer should be selected if you indicated **Run a Report** as in example A
File/Printer: Defaults in (lpt1)

Example B – Run an Extract File

| | | |
|---|--|--------|
| Run Location <input checked="" type="radio"/> Client <input type="radio"/> Server Server: <input type="text"/> | Output Destination <input checked="" type="radio"/> File <input type="radio"/> Printer <input type="radio"/> Window File/Printer: <input type="text" value="%temp%"/> | OK |
| Run Date/Time: <input type="text"/> | Run Recurrence: <input type="text"/> | Cancel |

File should be selected if you indicated **Run an Extract File** as in example B
File/Printer: Defaults in (%temp%\)

OK: Click on with your mouse or use the enter key.
 Check status on process monitor if desired.

I created an extract file – where is it? Right click with your mouse over the Start button, then select Search. You will get some variation of a search menu. Type in the in the file name (from page 5), select the drive you saved the report in and indicate date run.

You should have selected a secured network drive – if you accidentally have saved to the c drive – please move the data to a secured drive and delete from the c drive. It is unknown what drives you will have available. Do not keep HR/Pay data unsecured.

To open the file, select the file (double mouse click on the name) and then it will ask you what to open the file in. You can then select Excel and then you can name and save to wherever you want.

Notes and Guidelines

- Please be sure that you proof your data entry before you save. If you have entered data in error you will need to send an email to payroll@ku.edu or hrdept@ku.edu to correct the error.
- If an employee is in the process of transferring to another position that affects KU phone directory (paper) information, just check off his/her position but do not omit the employee. This process is only needed when the deadline is approaching for the phone directory.
- Phone directory refers the annual printed KU phone book which contains work and optional personal contact information.
- Exchange directory refers to the on-line work contact information.

Reasons to Omit a Person from the Phone Directory.

- All regular employees must be listed in the phone directory unless there are safety/security issues. The employee should contact Barb Walker, 785/864-7416 bwalker@ku.edu in HR/EO.
- Upon Affiliate request (they are not mandated to be in the phone directory).
- Upon Graduate Research Assistant (GRA) request (they are not mandated to be in the phone directory).
- Employee leaving the University in the near future.