

Roster Cards Guide

new world ERP – Human Resources: Roster Cards



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INTRODUCTION

Welcome to the new world ERP Roster Cards Processing Guide. This manual will guide the user through both the setup and processing aspects of Roster Cards Processing.

The guide is divided into two sections:

The System Administrator's Guide will focus on the setup components necessary to utilize Roster Cards Processing within new world ERP. This will include detailed information on master files that must be set-up such as roster agencies and positions.

The End User's Guide will describe the steps, workflow and options available in Roster Cards Processing to the end-user. It will guide the user through the process from changes in Workforce Administration to the Roster Card record. Included in the section will also be a guide to the standard reports available in the software.

This document is available in Microsoft Word format to allow for customization to the organization's needs and procedures.

SYSTEM ADMINISTRATOR'S GUIDE

COMPANY HR SETTINGS

Maintenance > Human Resources > Company HR Settings

The screenshot shows a web application interface for 'Company HR Settings'. At the top, there is a dark blue header with the title 'Company HR Settings' in white. Below the header is a navigation bar with several icons and the text 'Roster Cards'. The main content area is divided into two sections. The first section, 'Class Specification Level Titles', contains three rows: 'Level 1' with a text input field containing 'Class Specification', 'Level 2' with an empty text input field, and 'Level 3' with an empty text input field. The second section, 'Employee Workforce Data', contains a 'Changeover Date' label and a date input field with the value '01/01/2000' and a calendar icon. At the bottom of the form are three buttons: 'Save', 'Reset', and 'Print'.

Class Specification

Name the levels of Roster Card Specifications here. Typically, there is only one level.

Changeover Date

Prior to this date, all roster cards can be maintained through the Roster Card Employee List. Starting on the Changeover Date identified here, all records for County identified employees can only be made through Workforce Administration.

VALIDATION SETS

Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List

Validation Set Number	Description	Where Used	Purpose	Examples
277	Roster Cards Agency Type	Roster Positions	Describes the type of agency within the county. Can be as simple as County and Other or can be each of the types of agency in the county such as County, City, School, Village.	County, City, School, Other
278	Roster Position Status	Roster Position	Describes the status of the roster card position, not the employee.	Active, Inactive
279	Roster Position Type	Roster Position	Type usually based on PT/FT	Perm PT, Perm FT
280	Jurisdictional Class	Roster Specifications Roster Positions	As defined by NYS	
288	Roster Employee Veteran Status	Roster Employee	As defined by NYS	
289	Roster Employee Firefighter Code	Roster Employee	As defined by NYS	

Validation Set Number	Description	Where Used	Purpose	Examples
281	Roster County Use	Roster Specifications	Optional	
282	Roster Occupation Type	Roster Specifications	Can be similar to EEO	
286	Roster Position Inactive Reason	Roster Position	Why Position became inactive	
290	Roster Certification Exception	Roster Employee	Why Roster Card does not certify	
291	Roster Civil Service Status	Roster Employee	As Defined by NYS	
292	Roster Civil Service Action	Roster Employee	As Defined by NYS	Hire, Pay Raise

JOB EVENT MAINTENANCE

Maintenance > Human Resources > Event Maintenance > Job Events

Job Event Maintenance					
	Active	Job Event	Job Event Reason	Out of Position	Civil Service Action
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
⊕ Add new row					
✗	✓	MR Change 3	Out of Position	✓	✓
✗	✓	MR Change 4	Out of Position	✓	✓
✗	✓	MR Change 7			✓
✗	✓	MR Change 7	Out of Position	✓	✓
✗	✓	MR Change 8			
✗	✓	Multiple Changes			✓
✗	✓	Multiple Changes	Step		✓
✗	✓	Non-Primary Job			✓
✗	✓	Pay Rate Change			✓
✗	✓	Pay Rate Change	COLA & Step		✓
✗	✓	Pay Rate Change	Evaluation		
✗	✓	Pay Rate Change	Step		✓
✗	✓	Pay Rate Change Only			✓
✗	✓	Promotion	COLA		✓

Any Job Events that should create a Roster Card Entry when added to Workforce Administration will need to be selected in the Civil Service column with a checkmark. A job event for each value of validation set 292 should also exist and may need to be created and updated here as well.

ROSTER CARD MAINTENANCE

Maintenance > Human Resources > Roster Cards

ROSTER AGENCIES

Create an entry here for each agency that needs to be certified separately for payroll. This can consist of County, City, School, Village or can be broken down to departments within one or more of these.

Roster Agency List
Roster Agency Code Entry

General Contact

Code

Description

Type

Next Roster Position Number

Active ☒

County ☐

Save Save/New Delete Reset

1. Code: A unique code is necessary for each agency.
2. *Description of agency.*
3. Type: Drop down of types created for validation set 277.
4. Next Roster Position Number: Identifies the next position number that will be assigned to a position created for *this* agency.
5. Active: Checked if active agency
6. County: Checked if agency is identified as an agency that will be associated with actual county employees maintained in workforce administration.
7. Once the record is saved, Contact tab is made available to add contact information for the agency. Possibly the person on-site that is contacted for certifications.

After agencies are built, they must be assigned to users under user-based security in order to be used on the Roster Positions.

ROSTER CLASS SPECIFICATION

A Roster Class Specification will be created for each civil service job description that will be associated with a position. The number of levels identified in Company HR Settings determines the number of levels that can be associated here. Specifications can be used on multiple Roster Positions and do not need to be unique for each position.

1. Name of the Specification. Once saved this cannot be changed.
2. Active: When checked the specification is active
3. Occupation Type: Dropdown for validation set number 282
4. Adopted Date: Date specification was adopted
5. Start Date will fill in Effective date and is the date the specification can start being used in the system
6. Job Title: The title that will appear on the Roster Card Position. Example – Account Clerk
7. County Use: Dropdown for Optional validation set number 281
8. Jurisdictional Class: Dropdown for validation set number 280
9. Used By: Check the boxes that the specification is used by. Informational only.
10. Grade: Optional to associate Grade. Should only be used with county only specifications.

ROSTER POSITION

For county positions that are tied to employees in workforce, create a roster position that ties to each budget position. If there is not a budget position associated, the workforce change will not create a roster card entry. For outside agencies, one position can have multiple employees associated (head count).

Roster Position List
Roster Position

Roster Employee

Roster Position Number

Agency

Active ☒

Inactive Date

Inactive Reason

Last Accessed Date NOT USED

Effective Dates

Start Date

Position Status

Position Type

Class Specification

Jurisdictional Class

Head Count Allowed

Comments

Save Save/New Delete Reset Copy

1. Roster Employee is automatically filled by the system once it has been assigned to an individual(s).
2. Roster position number is not mandatory as the system will automatically assign the next consecutive number for this agency. It can be overridden if so desired.
3. Agency: Choose the agency that will hold this position. *If this dropdown is blank but agencies have been created, the user has not been assigned agencies in User-based security.*
4. Active: If unchecked the position becomes inactive and the Inactive Date and Inactive Reason (validation set 286) fields become mandatory to save the position.
5. Start date: First date this position can be assigned to an employee.
6. Position Status: Dropdown from validation set 278.
7. Position Type: Dropdown from validation set 279.
8. Class Specification: Once selected, the field Job Title will appear. This is brought directly from the Class Specification and cannot be edited.
9. Jurisdictional Class: Dropdown from validation set 280.
10. Head Count: The quantity of employees that can hold this roster position. This should be 1 for all county roster positions.
11. Comments: Add any other information regarding this roster position that needs to be recorded.

PERMISSIONS

App	Component	Description	All	Add	Change	Delete	View/Use	Print
HR	Roster Agency	Provides the ability to maintain Roster Agencies	X	X	X	X	X	
HR	Roster Classification	Provides the ability to maintain Roster Classifications	X	X	X	X	X	
HR	Roster Positions	Provides the ability to maintain Roster Positions	X	X	X	X	X	
HR	Roster Position Notes	Provides the ability to maintain Notes on Roster Positions	X	X	X	X	X	
HR	Roster Position Documents	Provides the ability to maintain Documents on Roster Positions	X	X	X	X	X	

USER BASED SECURITY

Maintenance>new world ERP Suite>Security>User Based Security

Agencies must be assigned to each user creating roster positions. After selecting the user, change the function to Roster Agencies and move any agencies to which the user should have access to the right.

END USER'S GUIDE

ROSTER EMPLOYEE LIST

Human Resources > Roster Cards > Roster Employee List

From the Roster Employee List page, you can search for specific Roster Employee Records or, in some situations, add new ones.

Roster Employee List

Agency

Job Title

Roster Position Number

Position Effective Date

04/14/2017

Last Name

First Name

SSN

Employee Number

Search

Reset

Roster Employee Name	SSN	Agency	Hire Date	Job Title	Roster Position Number	Civil Service Action
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New

Options

Using the criteria at the top of the page, you can reduce the number of records that will be returned when you click on Search. To create a new roster employee record, you must first determine whether the employee is a County Employee or Not and if the Changeover Date identified in Company HR Settings has been reached.

New roster employees prior to the changeover date will be created from this page, regardless of where they work. After the changeover date, only NON-county employees can be added here. County employees will be added and maintained through their employee record in Workforce Administration.

ADD EMPLOYEES USING THE ROSTER EMPLOYEE LIST

After navigating to the Roster Employee List, click New at the bottom of the page.

The screenshot shows the 'Roster Employee List' form with the 'General' tab selected. The form is divided into two columns of input fields. The left column includes: Last Name, First Name, Middle Name, Suffix (dropdown), Address (multiple lines), Zip (dropdown), City, and State (dropdown). The right column includes: Social Security #, Date of Birth, Phone Number, Former Name, Retirement Number, Veteran Status (dropdown), Fire Figher Code (dropdown), First Review Date, First Review Reason, Next Review Date, and Next Review Reason. At the bottom left, there are three buttons: 'Save', 'Save/New', and 'Reset'.

Name and Social Security Number fields are required to be completed. The rest of the fields should be completed to be in compliance with NYS roster cards.

Once the record is saved additional icons appear at the top of the screen and you will move on to the second icon to add a roster position to the employee. Click New.

The screenshot shows the 'Roster Employee Position' form. The top section contains fields for: Start Date, End Date, Roster Position (dropdown), Civil Service Status (dropdown), Civil Service Action (dropdown), and Comments (text area). To the right are fields for: Salary, Pay Type (dropdown), Civil Service Authorization, Authorization Date, Eligible List Number, Substitute (checkbox), Jurisdictional Class, and Class Specification. Below this is a section titled 'Roster Dates' with fields for: Hire Date, Civil Service Seniority Date, Retention Date, Appointment Start Date, Appointment End Date, Probation Start Date, and Probation End Date. At the bottom is a 'User Defined Fields' section with a label 'test' and an input field. At the very bottom are 'Ok' and 'Cancel' buttons.

Start Date, Roster Positon and Civil Service Action are all mandatory fields and must be completed. The rest of the fields should be completed to be in compliance with NYS roster cards.

The next Icon at the top is for Certifying the employees record and won't be completed until it is time to certify. At that time, navigate back to the employee record, select the Certifications Icon and click New.

Non-County Notes can be added to the Roster Card at any time. The notes feature provides a way of storing important narrative information related to a roster employee. It can also be used to communicate this information to other users in the system. If a user sends a note to another user or users, the note will appear in that user's "myNotifications" section of the home page with a link to the roster employee.

After Clicking on the Icon, click Add.

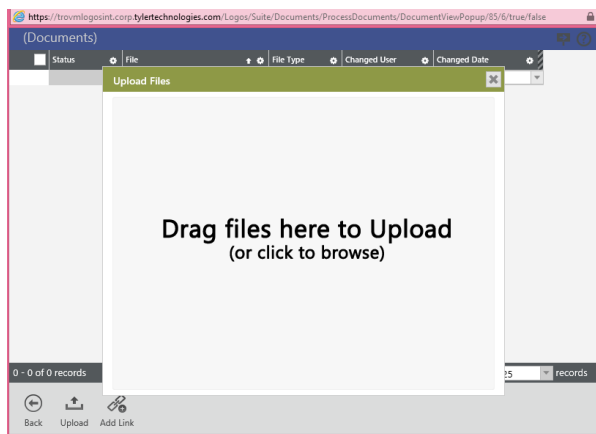
Subject line – Enter a title that briefly explains the note.

Message – Enter the body of the note.

Users – To forward the note to another user or users, select the user(s) from the Selected Users box on the right side of the screen. The selected users will then receive the note in their "myNotifications" window on their Home Screen.

Microsoft Word and Excel files, PDFs, images and other types of documents can be attached as reference using the Non-County Documents Icon. After selecting the Icon, click New and the Upload.

Drag the file you want to upload or click browse to select from the file list.

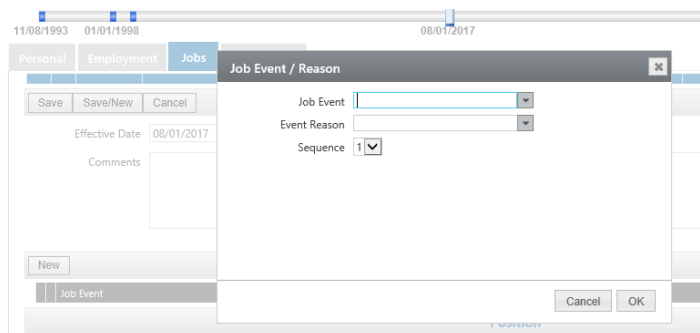


ADD/UPDATER ROSTER EMPLOYEES USING WORKFORCE ADMINISTRATION

On the employee's Job tab in Workforce Administration, the Roster Card information section is available to users with the proper permissions.

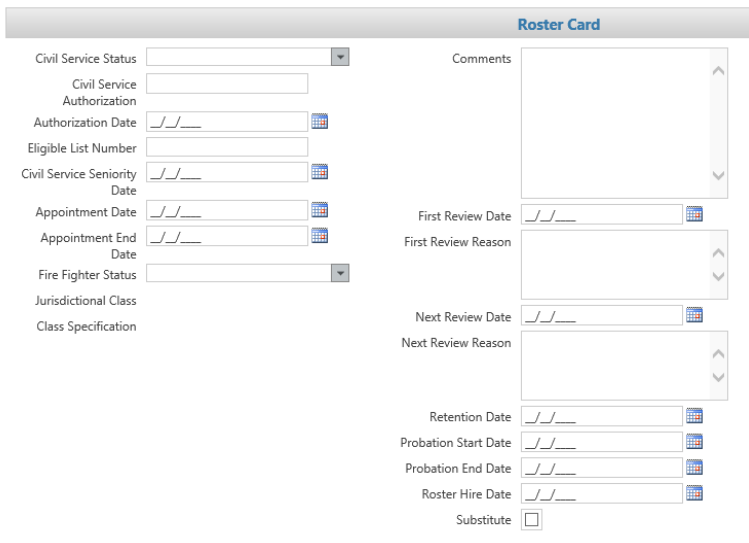
After navigating to an employee record in Workforce, click on the Jobs tab and Create Event. Add the date of the new event for the employee (if this is a new hire you will only Edit, not Create Event).

Next click New on the Job Event line. This is the area that tells the system when to create a Roster Card event based on the selection you make here. The Job Events that are setup as Civil Service events will create a Roster Card entry.



Select the appropriate Job Event and Event Reasons from the dropdowns. Sequence will default to the correct number based on the date that was entered. Usually this will be "1" unless multiple events happen on the same date. Click Ok.

Next Scroll down to the Roster Card portion of the Job tab.

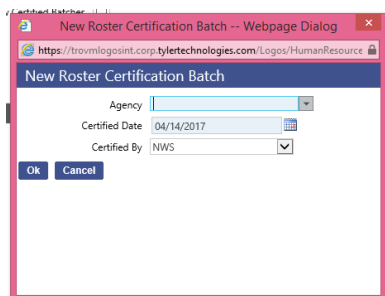


Complete or change the information to create the appropriate Roster Card entry on the Roster Employee record. Scroll to the top of the page and click save. This will save the record here as well as in the Roster Employee List.

CERTIFICATIONS

Human Resources > Roster Cards > Roster Certification Batch List

To create a certification list for an agency, click New at the bottom of the page.



Select the Agency to be certified, the date that will appear as the certified date on the roster employee record and the user that is doing the certification. Click Ok. The system will return you to the list page and you will need to Search for the batch you wish to certify. You can use the criteria at the top of the page to reduce your results or just click Search.

Once the batch you wish to certify is listed, you can use the print button at the bottom of the page to get a listing of the roster employees to be certified. Highlight the appropriate batch and click Print.

Roster Certification Report

Load Saved Report Distribution Group

Override Report Title Email Group

Agency

Certification Date

Report Type

Statuses

Certified ☒

Not on Payroll ☒

Exception ☒

Change any of the items that you wish and click Print. A report similar to the following will be generated. (This report can also be generated by navigating to Human Resources > Reports > Roster Reports > Roster Certification Report.)

1 of 1 100% Find | Next

Roster Certification Report

Agency A-1 - Agency One County
Certification Date 04/14/17

Name	Job Title	Salary Pay Type	Substitute
Status Certified			
Agnelli, Tania S	Elections Clerk	39.91 Hourly	No
Agnoli, Test	Elections Clerk	45,000.00 Annual	No
Barrymore, Drew	Class 1 Jon Title 2		No
Emmerich, Ryann G	Police Officer	21.10 Hourly	No
Lisa, Smith	Coaching		No
Lugenus, Greg	Elections Clerk	12.00 Hourly	No
Santarsiero, Zaire U	Police Officer	19.20 Hourly	No
Stadt, Jaylan P	Police Officer	19.81 Hourly	No
Status Certified Totals	8		

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This can be printed for use at the agency to be certified. When the results are ready to be recorded in the system, navigate back to the Roster Certification Batch List.

Clicking the Edit button will open the batch for individual certifications. By default, all roster employees are marked as being certified. To change, click on the edit in front of the employee's name. Change the status as appropriate.


Once any changes have been made, navigate back to the list page to complete the certification.

Highlight the batch to certify and click Certify on the bottom of the page. Certifications can be seen on the roster employee record.

REPORTS

Human Resources > Report > Roster Reports

1. Roster Agency Employee Listing – listing of roster employees similar to the following:



Roster Agency Employee Listing

As of 04/14/17


Sort By Agency - Job Title

Substitute	Name	Job Title	Retirement Number	Salary	Pay Type	Civil Service Status	Civil Service Action	Jurisdictional Class
Agency A-1 - Agency One County								
No	Barrymore, Drew	Class 1 jon Title 2				Status Number 1	Action #1	Jurisdictional Class #1
No	Hur, Ben	Elections Clerk		22.33	Hourly	Status Number 1	MR Change 1	Jurisdictional Class #1
No	Wuersig, Lisa	Elections Clerk		22.33	Hourly	Status Number 1	MR Change 1	Jurisdictional Class #1
Agency A-1 - Agency One County Totals			Roster Employees 3					
Agency Test - Test County								
No	Franklin, Tim	Road Maintainer Trainee		18.00	Hourly	Status Number 1	Multiple Changes	Jurisdictional Class #1
Agency Test - Test County Totals			Roster Employees 1					
Grand Totals			Roster Employees 4					

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2. Roster Card Report – Used to share Roster Card information with other Counties as it is run by roster employee:



Roster Card Report

Employee Name	SSN	Retirement Number	Former Name	Address	Phone	Veteran Status	Fire Fighter Status	Birth Date
Barrymore, Drew	984-93-8988			First street AGAWAM, MA 01001				11/27/1980

Job Title	Position Number	Position Type	Jurisdictional Class	Civil Service Action	Civil Service Status	Authorization	Eligible List	Salary	Start Date	Retention Date	Substitute
Agency A-1 - Agency One County Seniority Date											
Class 1 jon Title 2	3	Full Time	Jurisdictional Class #1	Action #1	Status Number 1				01/01/2000		No
Agency City - City Seniority Date											
Elections Clerk	1001	Full Time	Jurisdictional Class #1	Action #1					01/01/2017		No

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3. Roster Certification Report (shown above)
4. Roster Job Titles to Use Report – can be used to find vacant roster positions. This can be run by Job Title (example uses all):

1 of 1 100% Find | Next

Roster Job Titles In Use Report

Sort By Job Title

Agency	Current Occupant	Previous Occupant
Job Title Class 1 jon Title 2 Jurisdictional Class JC-1 - Jurisdictional Class #1 A-1 - Agency One County	Barrymore, Drew	
Job Title Coaching Jurisdictional Class JC-1 - Jurisdictional Class #1 A-1 - Agency One County City - City	Lisa, Smith	
Job Title Elections Clerk Jurisdictional Class JC-1 - Jurisdictional Class #1 A-1 - Agency One County A-1 - Agency One County City - City	Agnelli, Tania S Hur, Ben Barrymore, Drew	
Job Title Mechanic Jurisdictional Class JC-1 - Jurisdictional Class #1 A-1 - Agency One County Test - Test County		
Job Title Police Officer Jurisdictional Class JC-1 - Jurisdictional Class #1 A-1 - Agency One County A-1 - Agency One County A-1 - Agency One County A-1 - Agency One County	Emmerich, Ryann G Santarsiero, Zaire U Stadt, Jaylan P	Cariddi, Nyasia A
Job Title Road Maintainer Trainee Jurisdictional Class JC-1 - Jurisdictional Class #1 Test - Test County	Franklin, Tim	
Job Title Soldier 2 Jurisdictional Class JC-1 - Jurisdictional Class #1		

PERMISSIONS

App	Component	Description	All	Add	Change	Delete	View/Use	Print
HR	Workforce Admin-Employee	Provides the ability to search for employees in Workforce Administration					X	
HR	Workforce Admin-Jobs	Ability to add or delete a job on the employee's Workforce record	X	X		X		
HR	Workforce Admin Jobs-Payroll	Ability to change a job record in Workforce	X		X		X	
HR	Activity Roster Report	Ability to run report	X					X
HR	Roster County Employee Documents	Provides the ability to maintain documents on Roster County Employees	X	X	X	X	X	

App	Component	Description	All	Add	Change	Delete	View/Use	Print
HR	Roster County Employee Notes	Provides the ability to maintain Notes on Roster County Employees	X	X	X	X	X	
HR	Roster Employee Documents	Provides the ability to maintain Documents on Roster Employees	X	X	X	X	X	
HR	Roster Employee Notes	Provides the ability to maintain Notes on Roster Employees	X	X	X	X	X	
HR	Roster Agency Employee Listing	Ability to run report						X
HR	Roster Card	Ability to run report						X
HR	Roster Employee	Ability to Maintain Roster employees.	X	X	X	X	X	
HR	Roster Employee Certification	Ability to Maintain Employee Certifications	X	X	X	X	X	
HR	Roster Employee Audit Report	Ability to run report						X
HR	Roster Certifications	Ability to Maintain Certifications	X	X	X	X	X	
HR	Roster Job Titles and Use Report	Ability to run report						X
HR	Roster Probationary Report	Ability to run report						X
HR	Roster Certification Report	Ability to run report						X
HR	Roster Work History Report	Ability to run report						X

PROCESS MANAGER

Maintenance>new world ERP Suite>Process Manager

Process Manager can be used to limit the visibility of departments and employees in Workforce Administration to certain users.

Highlight the *Payroll – Department/Employee Inquiry* process and click **Set Up Departments**. On the next screen use the jump box to move departments from the Available Departments box to the Selected Departments box. Departments moved to Selected will be visible for this process. Click **Save**.

Breadcrumb back to the Process Manager and click the Manager icon at the top of the page. Highlight the user that you want to grant the *Payroll – Department/Employee Inquiry* process to and click **Process Approvals**. Choose *Payroll – Department/Employee Inquiry* in the process drop-down menu. Move the appropriate departments over in the Selected Departments jump box for the user to view in Workforce Administration.

USER BASED SECURITY

Maintenance>new world ERP Suite>Security>User Based Security

Agencies must be assigned to each user creating roster positions. After selecting the user, change the function to Roster Agencies and move any agencies to which the user should have access to the right.