CALM Project
Policy & Absence Management Implementation

AAMG
June 14, 2012
Agenda

• Project goals
• Preparation for go-live
• What is next
• Support and training
• System functionality
• System rollout schedule
• Q&A
Goals of Project

- Have accurate cost estimate of the University's paid time liability for financial stewardship, planning, and audited financial statements.
- Track absences and balances efficiently.
- Provide managers and staff with better tools to record and plan time off.
- Develop and implement absence policies that are consistently, fairly, and equitably applied across the campus.
Current Preparation for Go-Live

- Testing system
- Configuring security
- Collecting vacation and sick balances
- Verifying and updating departments’ organization structures
- Building reports in the Info Warehouse
- Developing training and reference materials
Data Collection

• For departments planning to Go-Live on July 2:
  – By 6/15 (tomorrow), submit projected vacation and sick balances through:
    • June 24 for biweekly-paid staff
    • June 30 for monthly-paid staff
  – Verify and/or update organization structure information submitted in February
  – Identify your Department Absence Administrators
What Is Next

- Training and reference materials
- Information sessions
- Updated HR website
- Policies become effective on July 1
- For those departments that provide the information by June 15, the system becomes available on July 2.
- All departments should be rolled onto the system by January 1, 2013.
Training & Reference Materials

- Quick Reference Cards and Online Help
- Information Sessions
  - General audience policy review and system demo
    - June 20, 9:30 a.m., Reynolds Aud., McDonnell (60 min.)
    - June 26, 2:30 p.m., Taylor Auditorium, Frick (60 min.)
  - Department Absence Administrator function demo
    - June 27, 9:30 a.m., Taylor Auditorium, Frick (90 min.)
- Navigation Videos
  - For employee self service
  - For manager self service
  - For department absence administrators
Ongoing Support

- CALM Web page
- HR Policy Manual and CALM FAQs online
- Your senior HR manager
- OIT Help Desk
- E-mail: calm@princeton.edu
CALM Web Page

www.princeton.edu/hr/progserv/er/calm/

Page Features
- General information about the project
- Links:
  - Policies
  - Tools and Resources
    - Calculation tools
    - Attendance tracking tool
    - HR client contacts
    - Absence roles
    - Department Readiness Checklist
- Additional Information
  - FAQs
  - Policy change highlights
  - About the system
  - Copies of presentations and memos
Roles

• Employee
  – Maintains own time off information

• Manager
  – Views and/or maintains information for those who are in their reporting structure

• Department Absence Administrator (DAA)
  – Has more localized control for changes
  – Accesses all absence data for an entire department
  – Creates and corrects absence events post-processing and makes balance adjustments
  – Will have access to departmental absence reports in the Information Warehouse
System Functionality

• Employee self service pages
  – Report Absence
  – Edit/Cancel Unprocessed Time
  – Balance Statement (view only)
  – View Absence Balances (view only)

• Manager self service pages
  – Same as above plus
  – Employee Selection Page
  – Delegation of manager role to another person

• Department Absence Administrator
System Functionality

System Functionality

Time Reporting
Report and review your time, schedules, request absences and more.

- **Balance Statement View**
  - Balance Statement View

- **Report Absence**
  - Report an absence that has taken place or will take place.

- **Edit/Cancel Unprocessed Time**
  - Edit/CANCEL absence times that have not been processed yet.

- **Absence Balances**
  - View your absence balances detail.
# Balance Statement View

**Ben O'Drill**  
Admin 11, Executive Officer  
Specify the date to view. To retrieve a complete history, leave From and Through dates blank and click Refresh.

**Leave Plan**: Vacation

**View Unprocessed Activity**

<table>
<thead>
<tr>
<th>Period Begin</th>
<th>Period End</th>
<th>Description</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/08/2012</td>
<td>06/08/2012</td>
<td>Vacation Submitted</td>
<td>-7.25</td>
</tr>
<tr>
<td>10/01/2011</td>
<td>10/31/2011</td>
<td>Vacation Adjustment</td>
<td>-14.50</td>
</tr>
</tbody>
</table>

**View Absence Balance Details**

<table>
<thead>
<tr>
<th>Period Begin</th>
<th>Period End</th>
<th>Description</th>
<th>Debit</th>
<th>Credit</th>
<th>Balance</th>
</tr>
</thead>
</table>

**Go To:**  
- Edit/Cancel Unprocessed Time  
- Report Absence  
- View Absence Balances
Manager Self Service: Select Employee

Report Absence
Select Employees to Process

Instructions
This page displays your direct reports as of the date you selected on the previous page.

If you click on an "Org Chart" icon, you have the ability to view employees who indirectly report to you. Click the "Org Chart" icon to drill down and/or click the "Drill-Up" icon to navigate back.

After you select the employee, click Continue.

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>HR Status</th>
<th>Sick Balance</th>
<th>Personal Balance</th>
<th>Vacation Balance</th>
<th>Served Time Balance</th>
<th>Duty Time</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Juana Beer</td>
<td>960412570</td>
<td>Active</td>
<td>58.00</td>
<td>14.50</td>
<td>14.50</td>
<td></td>
<td>100,000</td>
<td>Bakery</td>
</tr>
<tr>
<td>Coisa Fate</td>
<td>0100553553</td>
<td>Active</td>
<td>58.00</td>
<td>14.50</td>
<td>14.50</td>
<td></td>
<td>100,000</td>
<td>Bakery</td>
</tr>
<tr>
<td>Anita Lift</td>
<td>0100003680</td>
<td>Active</td>
<td>58.00</td>
<td>14.50</td>
<td>14.50</td>
<td></td>
<td>100,000</td>
<td>Bakery</td>
</tr>
<tr>
<td>Art Major</td>
<td>010003287</td>
<td>Active</td>
<td>58.00</td>
<td>14.50</td>
<td>14.50</td>
<td></td>
<td>100,000</td>
<td>Bakery</td>
</tr>
<tr>
<td>Freida People</td>
<td>960258823</td>
<td>Active</td>
<td>58.00</td>
<td>14.50</td>
<td>14.50</td>
<td></td>
<td>100,000</td>
<td>Bakery</td>
</tr>
<tr>
<td>Danielle Soloud</td>
<td>910075149</td>
<td>Active</td>
<td>58.00</td>
<td>14.50</td>
<td>14.50</td>
<td></td>
<td>100,000</td>
<td>Bakery</td>
</tr>
<tr>
<td>Agusta Wind</td>
<td>000356577</td>
<td>Active</td>
<td>58.00</td>
<td>14.50</td>
<td>14.50</td>
<td></td>
<td>100,000</td>
<td>Bakery</td>
</tr>
</tbody>
</table>
About Organization Structure

- Collecting this information from departments to update the PeopleSoft position table
- Will be maintained ongoing
- Determines what can be seen through manager self service
- Future basis for other manager self service transactions and functions
### System Rollout

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/15</td>
<td>Departments return balance worksheets and confirm organizational structure</td>
</tr>
<tr>
<td>6/18-22</td>
<td>HR validates data and prepares for upload into Absence Management, configure security, update org structure info</td>
</tr>
<tr>
<td>6/25-29</td>
<td>Balances loaded into Absence Management (automated process), finalize security setup and org structure updates</td>
</tr>
<tr>
<td>7/2</td>
<td>Employees, managers, and department absence administrators have access into the system</td>
</tr>
<tr>
<td>7/2 &amp; beyond</td>
<td>Monthly-paid employees will enter time off and view balances in HR Self Service. Biweekly-paid employees will view their balances in HR Self Service.</td>
</tr>
</tbody>
</table>
The Future of Absence Management

- PeopleSoft HCM 9.2 upgrade
- Time Collection to be replaced by PeopleSoft Time & Labor module
- Complete integration between two modules
- Additional functionality including mobile and Outlook integration (eventually)
Questions?

CALM Information Page:
www.princeton.edu/hr/progserv/er/calm

CALM Inquiries and Issues
calm@princeton.edu