iSYS*Works New School Year HR Procedures

The following steps should be followed to prepare for September 1.

1. Before running any major process, perform a full system backup. This will ensure that the database can be restored back to the point of the backup.

2. Ensure that all grids for the new year (i.e. September 1, 2009) are in place. This should be done before hiring to ensure accurate salary letters.

3. Ensure that all calendars have been created for the previous year (i.e. 2008 Administer->Calendars).

   For academic calendars, the calendar year should start in September and end in June. In View Year, change the days that are not considered teaching to ensure that there are the appropriate number of teaching days (i.e. 194).

4. Update seniority and possibly grid steps (Administer->Seniority->Update).

   Select the *Account*. The *Calculate To* date should be the day before the effective grid date (i.e. August 31, 2009). The *Calc Incr?* field should be checked on. The *Force Grid?* field should only be checked on if you wish to ensure that the grid step on the job records match the seniority account value (up to max step); otherwise the calculated increment will be applied separately to both the seniority account and grid step.

   Click on **Simulate**. This will calculate the seniority and step increment for all active staff within the Seniority Model. You can simulate as many times as necessary.

   Click on **View**. This will display the new seniority and grid steps. Any name that is preceded by an "=" indicates that person does not have the seniority assigned and should be corrected before proceeding. Review the display ensuring that each staff has the appropriate *SenIncr* and *StepNew*. The *Diff* column indicates the grid step increment. Double check this value as it will affect their new salary. Do forward and reverse sorts to highlight possible problems.

   Click on **Update** when you are sure that everything is good. This step will immediately update the seniority values and will store the new grid steps to be applied later.

The **Rollback** button should be used with extreme caution. There may be a timing problem if not done soon after the update. If there is a need to rollback the update, it is advisable to contact iSYS first before proceeding.

5. Proceed to terminate employees so that there is no job record for September 1, 2009. This may also be done later.

6. Proceed to update grid steps and new salaries (Administer->Grids->Apply New Grids).

Enter the *Grid Date* (i.e. September 1, 2009).

Click on *Update Step* if you are updating grid steps as well.

Click on **Simulate**. This will provide a preview of step and salary changes. Job changes will be locked at this point. You may void the simulation and unlock job changes by clicking on **Save** at this point or any time before **Apply**. No changes will have been made.

Click on **View**. This will display all changes. Ensure that new salaries and grid steps are accurate. Re-run **Simulate** if there are systemic problems such as incorrect grid rates. If there are minor personal discrepancies, you can note them and change each person manually after the grid update. You may wish to export to Excel and save for later reference.

Click on **Change Report** to produce printable version of changes. You may wish to print or you may export to Word and save for later reference.

Click on **Apply**. This will update each person's salary and/or grid step as of September 1, 2009. You may do spot checks at this point.

Click on **Save** if you are good to go.

The **Rollback** button should be used with extreme caution. There may be a timing problem if not done soon after the update. If there is a need to rollback the update, it is advisable to contact iSYS first before proceeding.

7. Benefits that are related to salary (i.e. Life) may also have to be updated for September 1, 2009 (Select->Person->Benefits->Calculate Life). This can be done any time before the first pay run of September.