King County

Department of Executive Services

Human Resources Division

User Guide for Contract Worker Pages and Processes

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Prepared by the DES/HRD CCQA Team

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HUMAN RESOURCES DIVISION
ADMINISTRATION BUILDING
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Table of Contents

Introduction

Basic PeopleSoft Navigation

A separate guide and training course is available on basic navigation PeopleSoft v9.0. Before using this guide, you should review this Basic Navigation Guide.

In this Guide

The material in this guide provides information about the following:

- How to request access to PeopleSoft
- How PeopleSoft security limits access to data
- How to Login to PeopleSoft
- How to process contingent worker requests
- How to run queries
- How to run batch reports

Requesting Access to PeopleSoft

To request the access to PeopleSoft, go to the Finance intranet site:

http://financeweb.metrokc.gov/finance/payroll/Forms/PS_Security_Forms.aspx

Click on the **Form** link

Fill out PeopleSoft Access Request Form. Once completed, submit the form to your Department or Division's PeopleSoft HCM Security Officer. The same site where you find the request form has a **Security Officers** link that lists the security officers.

Security

Access will only be given to employees whose job function requires them to view, add or update contract worker requests.

A given user's access will be limited to a specific department or to a specific set of divisions within a department.

Login to PeopleSoft

To access links to PeopleSoft v9.0, log on to

http://financeweb.metrokc.gov/finance/default.aspx

At the bottom right hand side of the screen there are several links under the header **SYSTEMS**. Clicking on the link titled **PeopleSoft 9.0** will open the sign-on page for the **production** system and take you to this URL:

https://larch.kingcounty.gov:17000/psp/HPRO90/?cmd=login&languageCd=ENG&

We recommend that you add this link to your "Favorites" list.

The Sign In page appears. Login using your userid and password.

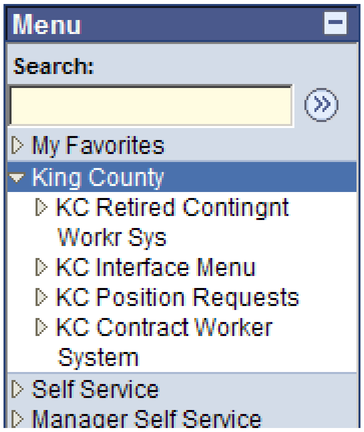
After you have logged in you will see the initial menu on the left side of the page:

Click on the desired link and you will be taken to the sub-menus associated the requested functionality.

Note that your security level limits your access so that you may not see some menu items that are shown in the screen shots in this document.

Process Contract Worker Requests

From the initial menu, click on "King County" and see the following menu items:



Click on the "KC Contract Worker System" menu item and see:

To the right of this menu, you will see:

Click on the desired link to take you to the initial search page for the selected process. Each menu item and the associated process are described in the remainder of this manual.

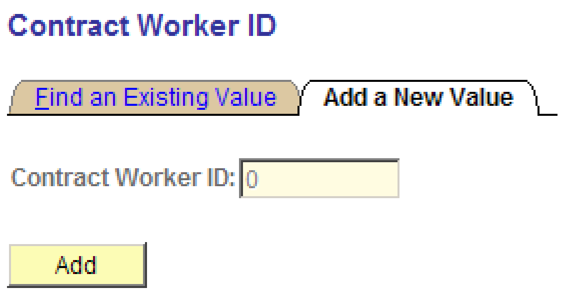
☛ *The descriptions below assume that you are knowledgeable about navigating in PeopleSoft and using PeopleSoft search pages.*

Contract Worker ID

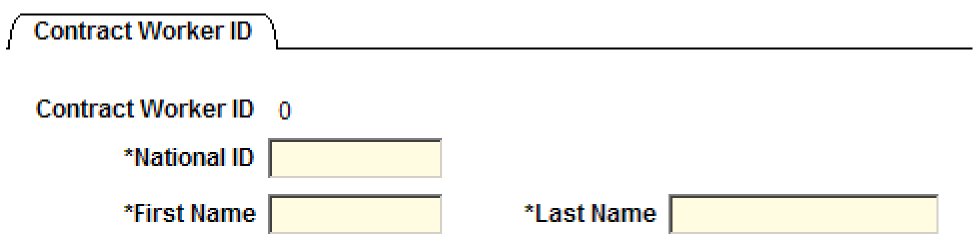
Enter a Contract Worker's Identity

Navigation: Home > King County > KC Contract Worker System > Contract Worker ID

1. Navigate to the **Contract Worker ID** page and select the **Add a New Value** tab and see:



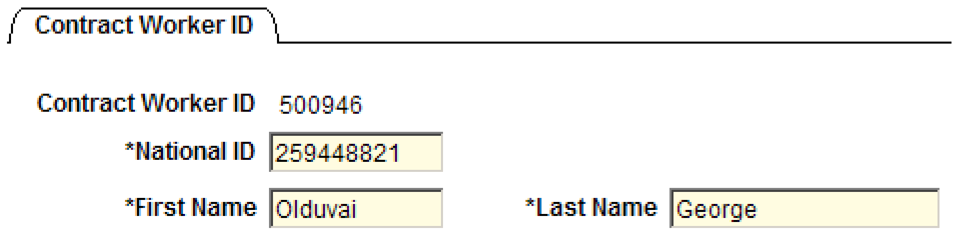
Then click the Add button and the next page will appear with one tab named **Contract Worker ID**. You enter values in the required fields (Required field names are preceded with an *)



Field Name	Description of Use
Contract Worker ID	Automatically generated by the system to uniquely identify the contract worker.
***National ID**	Enter the person's SSN here. Duplicate SSn's are not allowed.
***First Name**	Enter the first name.
***Last Name**	Enter the last name.

2. Once the request has been completed, click the Save button to save this contract worker request. Upon saving, the system will automatically assign a **Contract Worker ID** to the request.

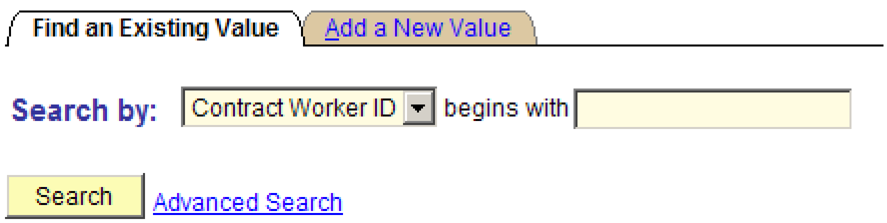
3. The following screen shot shows the **Contract Worker ID** tab from a typical contract worker request after the data has been saved.



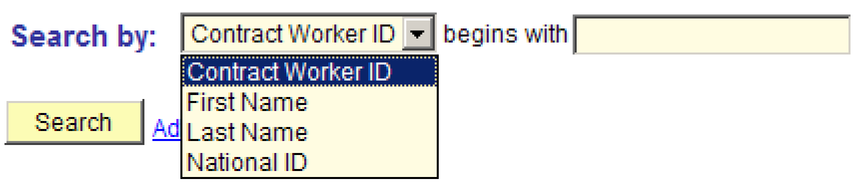
Update a Contract Worker’s Identity Data

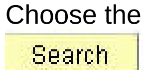
Navigation: Home > King County > KC Contract Worker System > Contract Worker ID

4. Navigate to the **Contract Worker ID** page and you will be placed on the **Find an Existing Value** tab and see:



5. The drop-down list has the following search items:



Choose the appropriate item in the drop down, enter your search criteria and click  . Navigate to the desired contract worker and update any of the fields except the contract worker ID.

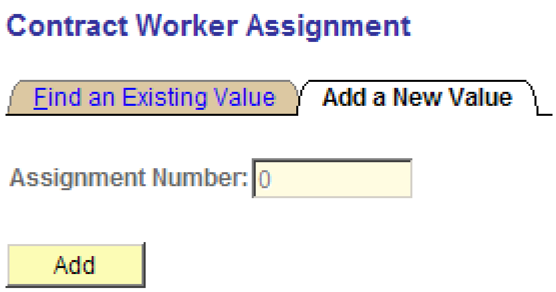
Administer Contract Worker Assignment

Enter a Contract Worker Assignment.

☛ **You do NOT need HRD approval to hire a contract worker.**

Navigation: Home > King County> KC Contract Worker System > Administer Contract Assignment

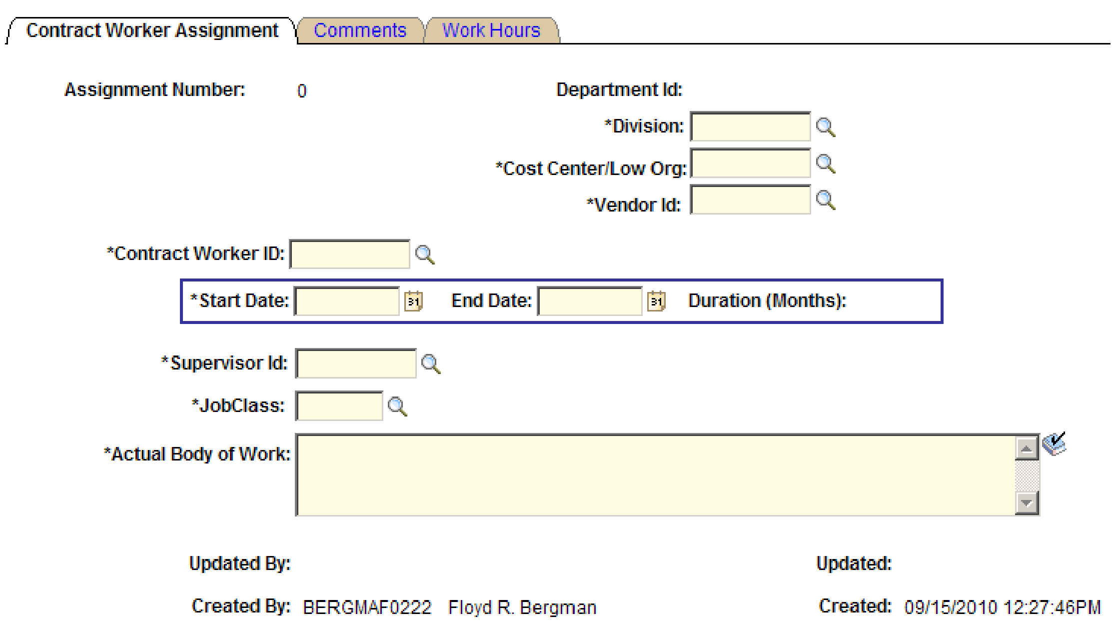
6. Navigate to the **Contract Worker Assignment** page and select the **Add a New Value** tab and see:



7. Then click the Add button and the **Contract Worker Assignment** page will appear, showing three tabs named:
   - Contract Worker Assignment
   - Comments
   - Work Hours

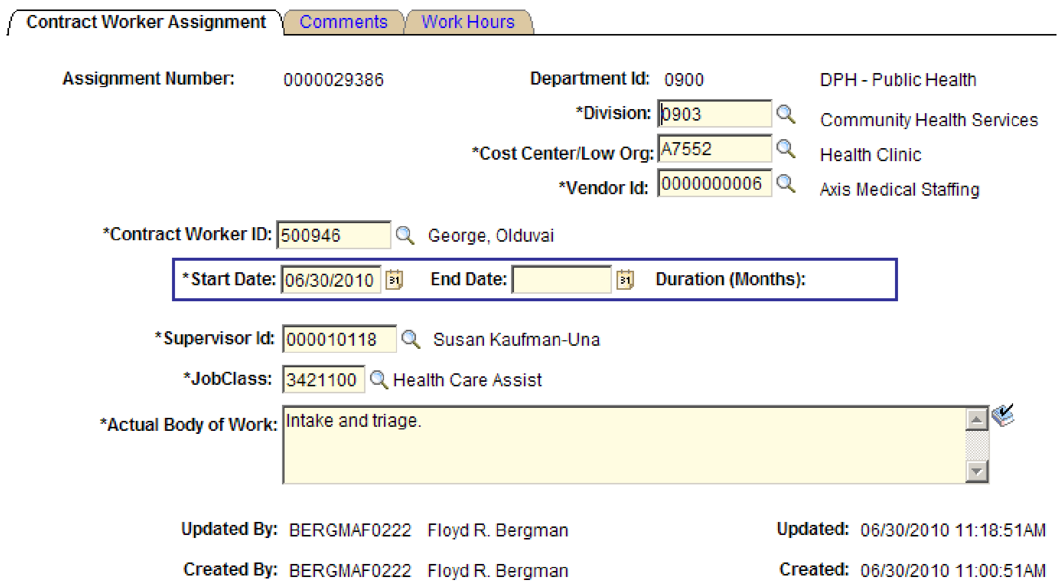
Contract Worker Assignment Tab

8. On the **Contract Worker Assignment** tab shown below, you enter values in the required fields (Required field names are preceded with an *).



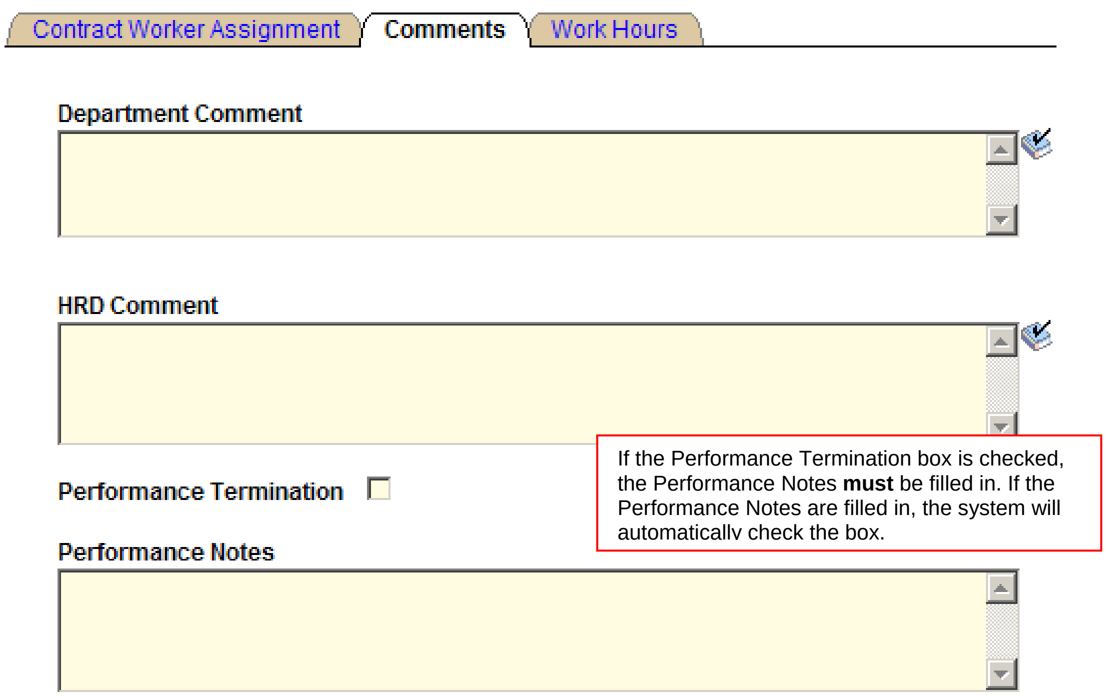
Field Name	Description of Use
Assignment Number	Automatically generated by the system to uniquely identify the request.
Department ID	Automatically set based on the Division that you select.
***Division**	Select the division for which you are making this request. Notice that the department is automatically set according to the organizational hierarchy. In other words, by selecting your division, you will automatically select the correct department.
***Cost Center /Low Org**	Enter the cost center/low org.
***Vendor ID**	Select the Vendor ID of the Vendor supplying the contract worker. The Vendor name is displayed after the label "Vendor ID".
***Employee ID**	The emplid of the person filling the assignment.
***Start Date**	The estimated start date of the assignment.
End Date	The last date the contract worker worked in the assignment. Not required.
***Supervisor ID**	Select the employee ID for this position's supervisor. The supervisor is displayed alongside.
***Job Class**	The seven digit CMS class spec code for the position.
***Actual Body of Work**	This should be the description of the body of work that will be used during the BOW review.
	The following four fields are automatically set by the system and cannot be changed.
Updated By	Userid and name of last person to change the data.
Updated	Date and time of the last update.
Created By	Userid and name of the person who initially entered the data.
Created	Date and time this request was first entered. This also called the "**Create Date**" or sometimes the "**Request Date.**"

Here is a typical contract worker assignment:



Comments Tab

9. Department and HRD comments may be entered in the Comments tab. Comments may contain up to 2,000 characters of text. None of the fields are required.



Field Name	Description of Use
Department Comment	For use by the department.
HRD Comment	For use by HRD only. Locked for department users.

Field Name	Description of Use
Performance Termination	Click this box if the contract worker was not able to perform the work. If the Performance Termination box is checked, the Performance Notes **must** be filled in. If not, you will receive an error message saying: *Performance Notes are required when the Performance Termination box is checked.* You will not be able to save the changes until the Performance Notes are filled in.
Performance Notes	Explain the circumstances that led you to check the **Performance Termination** check box, above. If the Performance Notes are filled in, the system will automatically check the Performance Termination box.

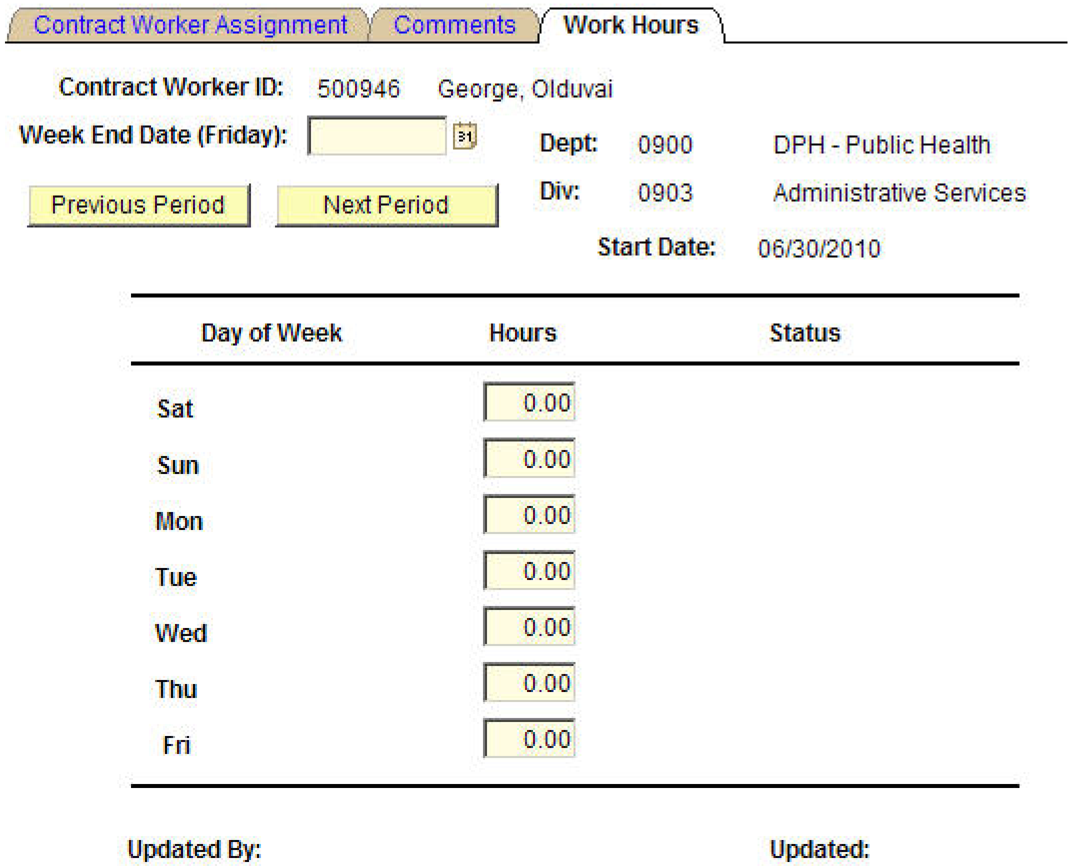
10. Once the request has been filled out, press the 

button to save your entry for this Contractor request. Upon saving, the system will automatically assign a system position number to the request.

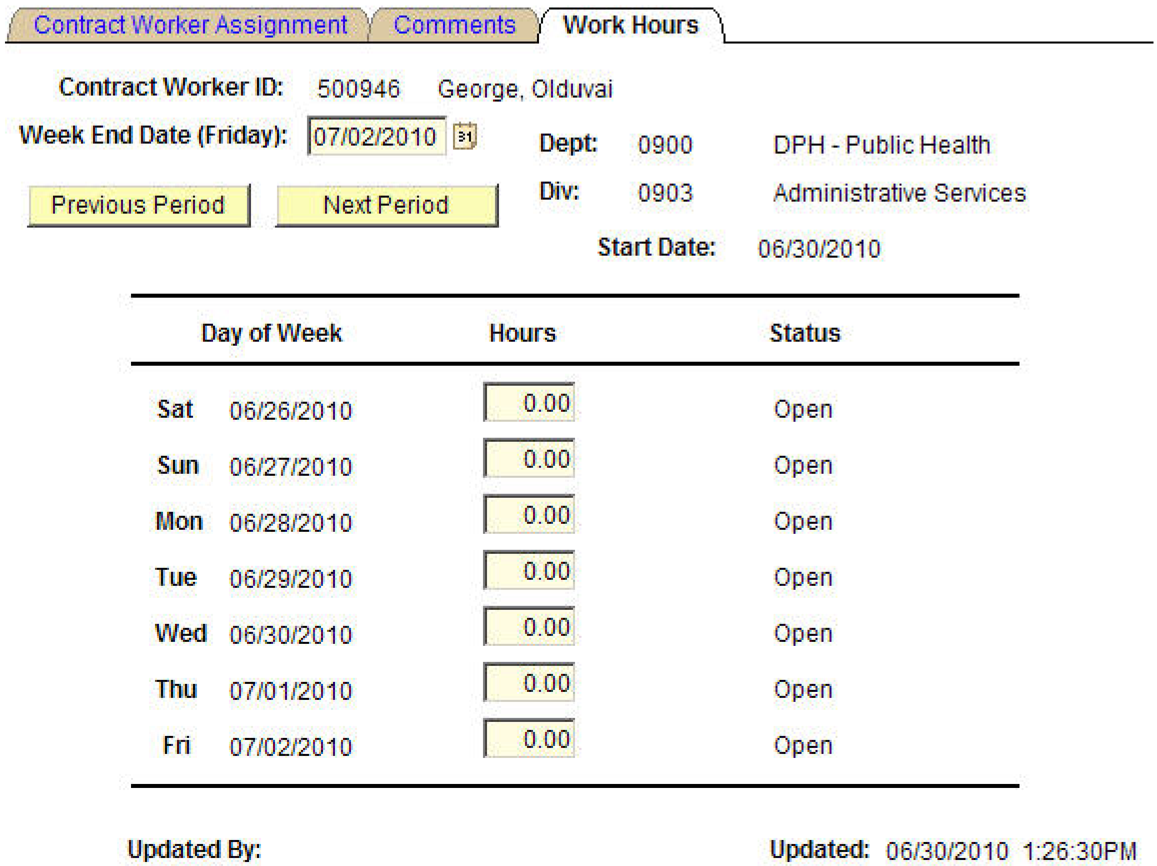
Work Hours Tab

Entering Hours for a New Period

11. Use this page to enter assignment hours for a contract worker. If no hours have ever been entered for the assignment you will see:



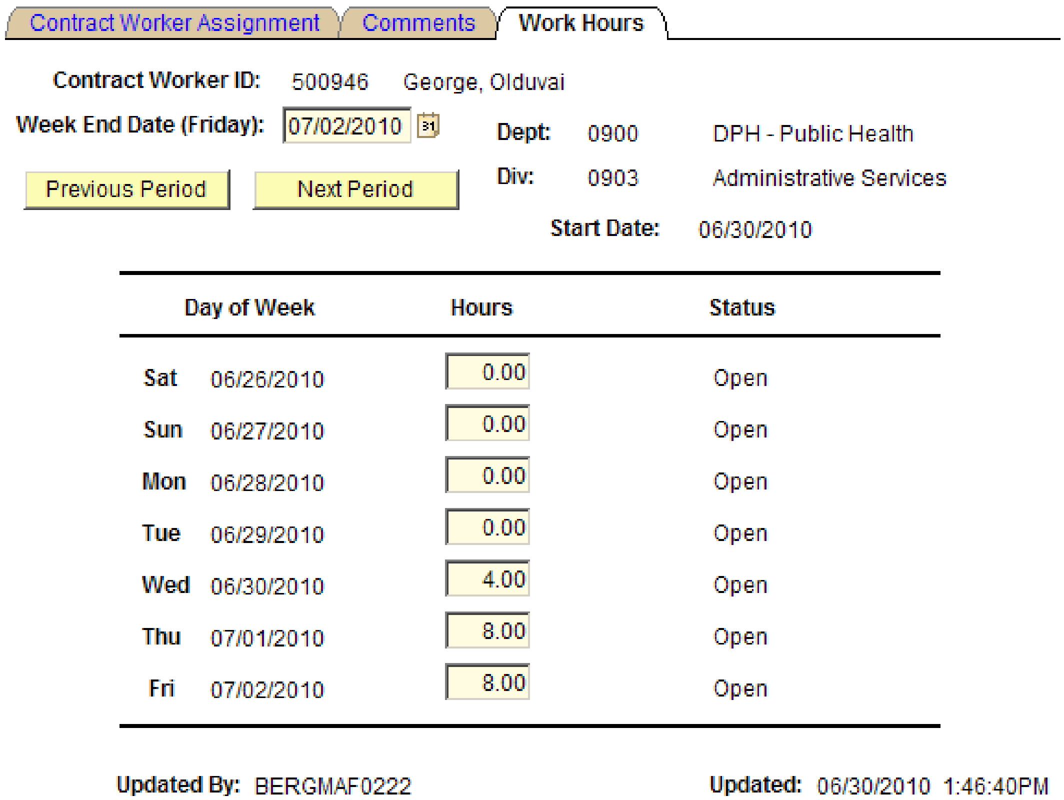
12. To enter hours for a **new** period enter the period end date in the field labeled "*Period End Date (Friday)" and you will see a grid of hours for each day of the week in the given period. The hours will be initialized to zero. In the following screen shot, the user selected 7/2/2010 as the week ending for the hours entry and the system displayed the following:



Field Name	Description of Use
***Week End Date (Friday)**	The end date of the week. If the day is not a Friday, you will receive an error and must correct the date.
Prior Week button	Click this button to navigate to the next week.
Next Week button	Click this button to navigate to the prior week.
Day of Week	The day of the week and date. Display only.
Hours	The hours entered by the department. You cannot change the value if the day falls in a closed period. HRD can edit the hours at any time.
Status	The status of the hours entry. If it is "Open", you may enter hours for that day. If it is "Closed", you cannot edit the hours for that day. HRD can edit the hours at any time.

☛ If hours have been entered for the assignment, the system will display hours for the most recent period end date.

The page lets you tab through the days of the week, in sequence. When you tab out of the Friday hours the Save button is selected so that you can simply hit the “Enter” key to save the entered hours. Here is a typical contract worker assignment with hours entered:



The following example shows hours that span two months, June and July, where June is "Closed" and July is "Open."

Contract Worker Assignment | Comments | **Work Hours**

Contract Worker ID: 500946 George, Olduvai

Week End Date (Friday): 07/02/2010

Dept: 0900 DPH - Public Health

Div: 0903 Administrative Services

Previous Period | Next Period

Start Date: 06/30/2010

Day of Week		Hours	Status
Sat	06/26/2010	0.00	Closed
Sun	06/27/2010	0.00	Closed
Mon	06/28/2010	0.00	Closed
Tue	06/29/2010	0.00	Closed
Wed	06/30/2010	4.00	Closed
Thu	07/01/2010	8.00	Open
Fri	07/02/2010	8.00	Open

Updated By: **Updated:**

The hours for the closed month cannot be accessed. The hours in the open month are enterable.

Contract Worker Reports

About the Reports

This section describes the batch reports that you may run. Each report is described as follows:

- Menu path
- Report name and description
- Run controls for batch reports
- Sort order
- Remarks
- The columns of data and a brief description

Security Considerations

PeopleSoft security limits the departments and divisions you can access.

☛ **The output from reports and queries that you run will be limited to those departments and divisions to which you have access.**

Query Reports

The HR document titled *User Guide for Contingent Worker Queries* describes how to use all of the Contract Worker and Contingent Worker queries.

Batch Reports

The following is the PeopleSoft navigation for the batch reports and processes.

Navigation: Home > King County > KC Contract Worker System > Reports

List of Batch Reports

The following table gives a brief description of the batch reports.

Report Name	Description
KC CWR Rolling 12 Graph	KC CWR Rolling 12 Graph. Use this report to produce Rolling 12 graphs. This report also produces the Rolling 12 detail and analysis reports that show the data that was used to produce the graphs.

Batch Report Description for KC CWR Rolling 12 Graph

The material that follows will detail the steps for running and using the Rolling 12 Graph.

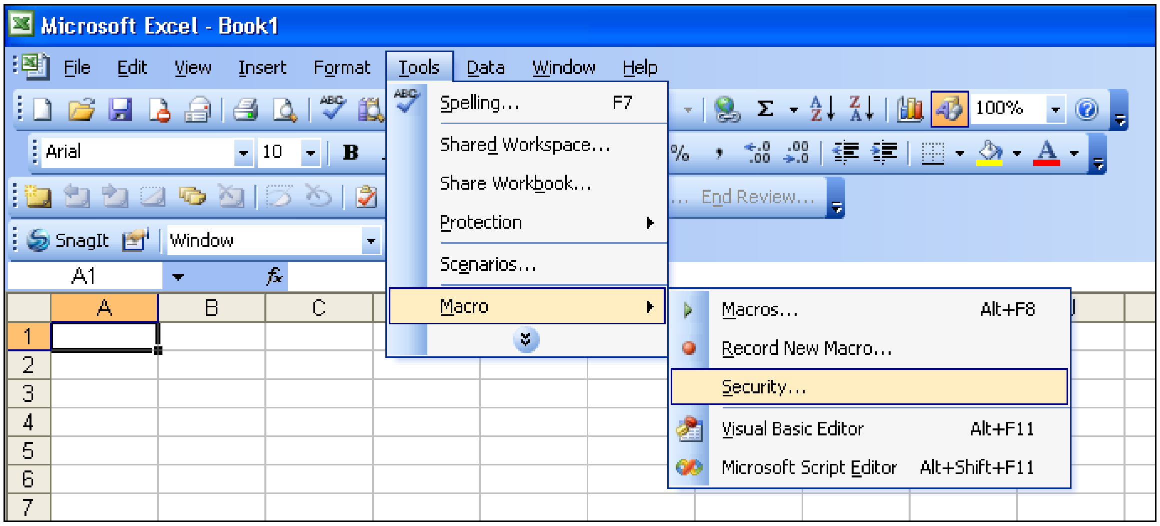
One-Time Setup

☛ Before you use the Graph feature of this report for the first time you will need to do the following one-time setup:

13. Step 1

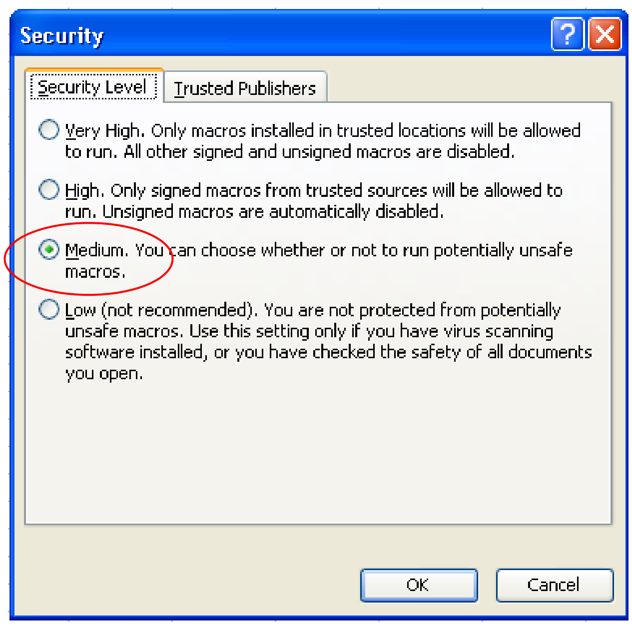
Update your Excel macro security

Open Excel and navigate in the menu to: Tools > Macro > Security



14. Step 2

Click the Medium radio button and then click the OK button

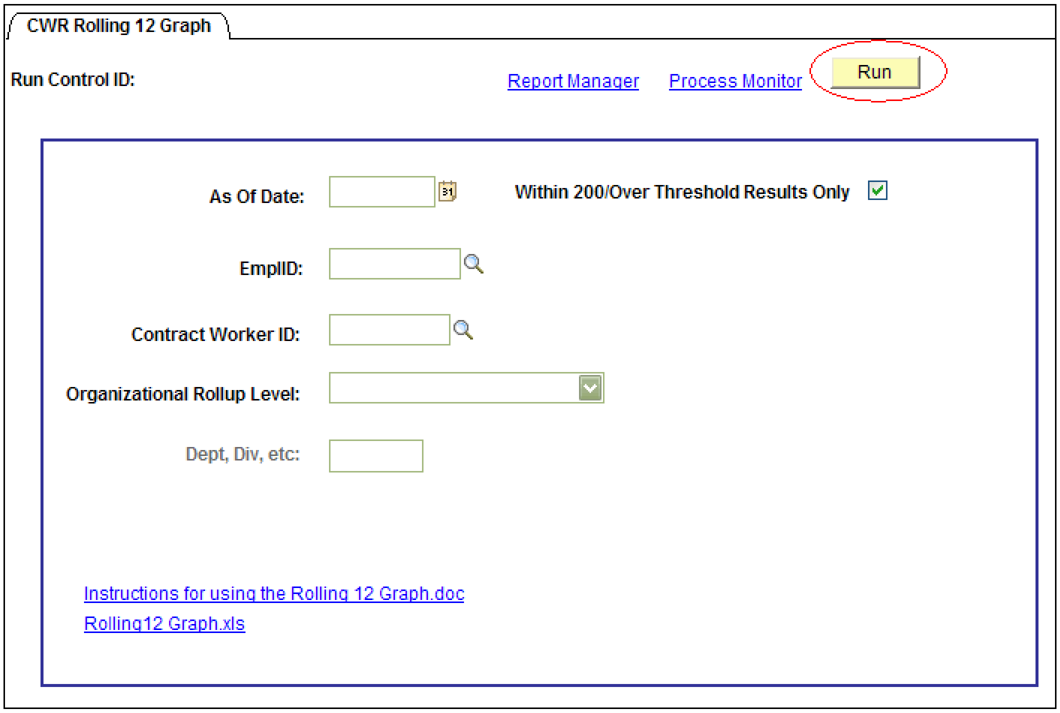


Running and Using the Rolling 12 Graph Report After the One-Time Setup

15. Step 1

Navigation: Home > King County > KC Contract Worker System > KC CWR Rolling 12 Graph

Enter data on the Run Control page, if needed and click the Run button.

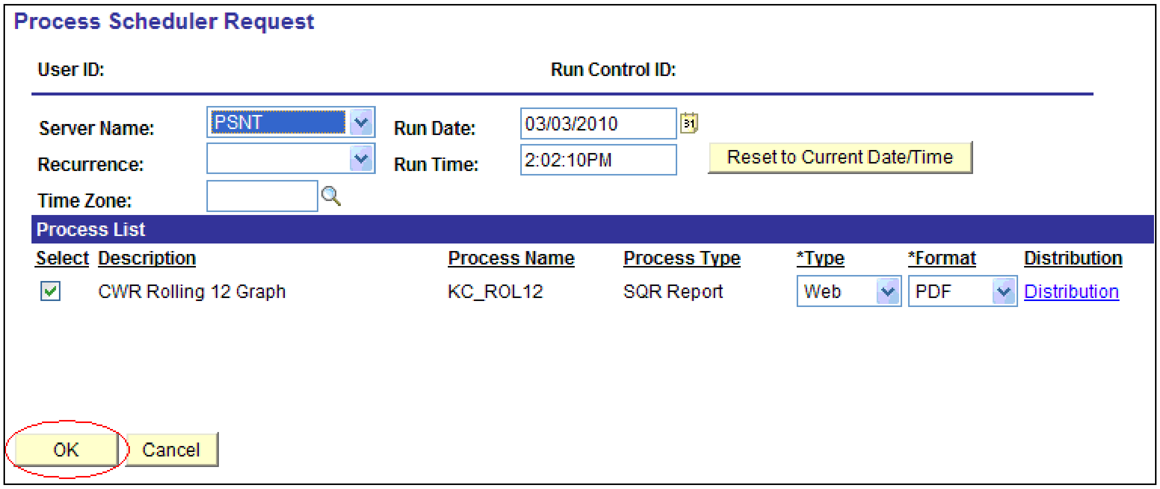


Field Name	Description of Use
As of Date	If not entered, report will run as of today. If entered, report will run as of the date entered.
Within 200/Over Threshold Results Only	If the box is checked, the results will only display STT employees and contract workers that are within 200 hours of reaching their threshold at any time during the 12 month rolling period or are over their hours threshold at any time during the 12 month rolling period. If the box is unchecked, all STT employees and contract workers will be displayed regardless of their hours threshold.
EmplID	If an EmplID is entered, the report will only run for that STT employee. If not entered, the report will run for all STT employees and contract workers.
Contract Worker ID	If not entered, the report will run for all STT employees and contract workers. If a Contract Worker ID is entered, the report will only run for that contract worker.
Organizational Rollup Level	If not entered, the report will run for all departments. The drop down allows the user to select to run the report for a specific Department, Division, Section, Unit or Low Org/Cost Center. If one of these values is selected the Dept, Div, etc. field will be required.

Field Name	Description of Use
Dept, Div, etc	Based on the value selected in the Organizational Rollup Level field above, the user will be able to select specific Departments, Divisions, etc.

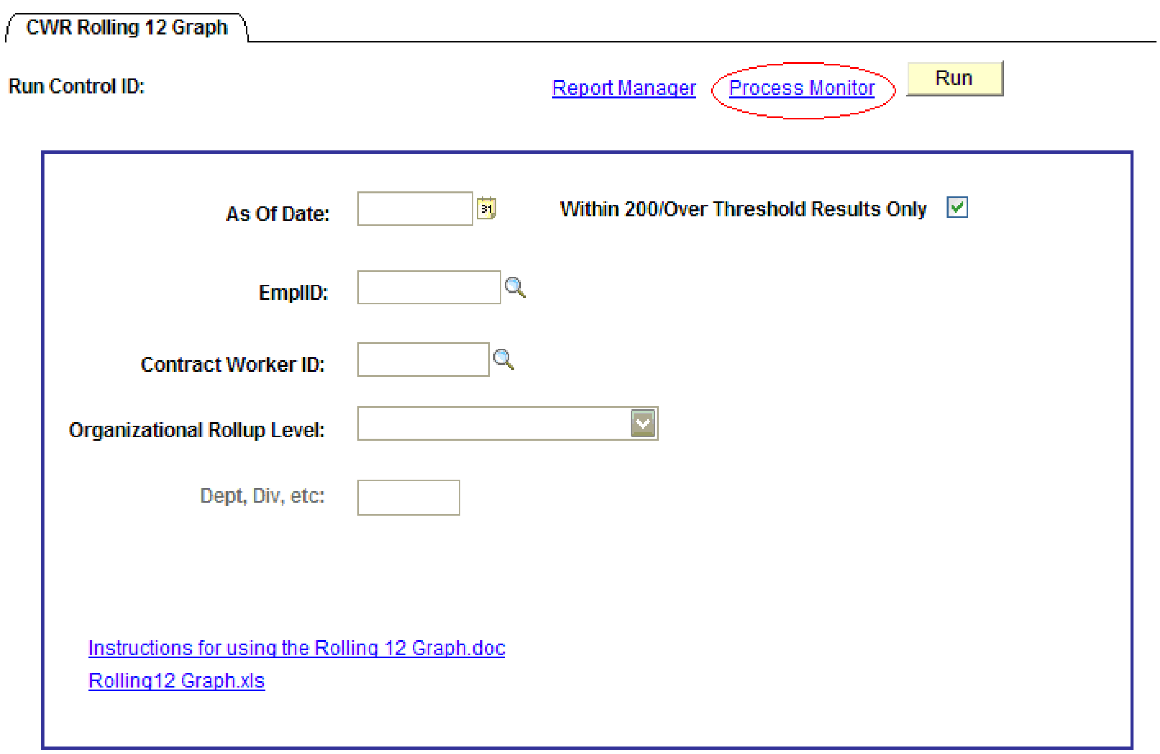
16. Step 2

    Click the OK button



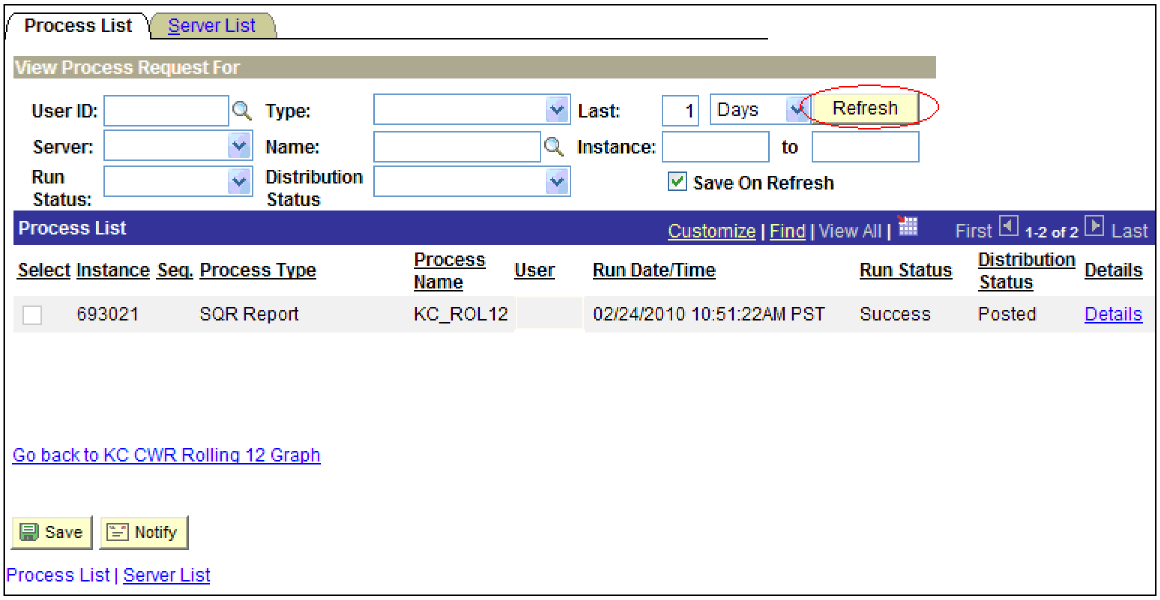
17. Step 3

    Click the Process Monitor link



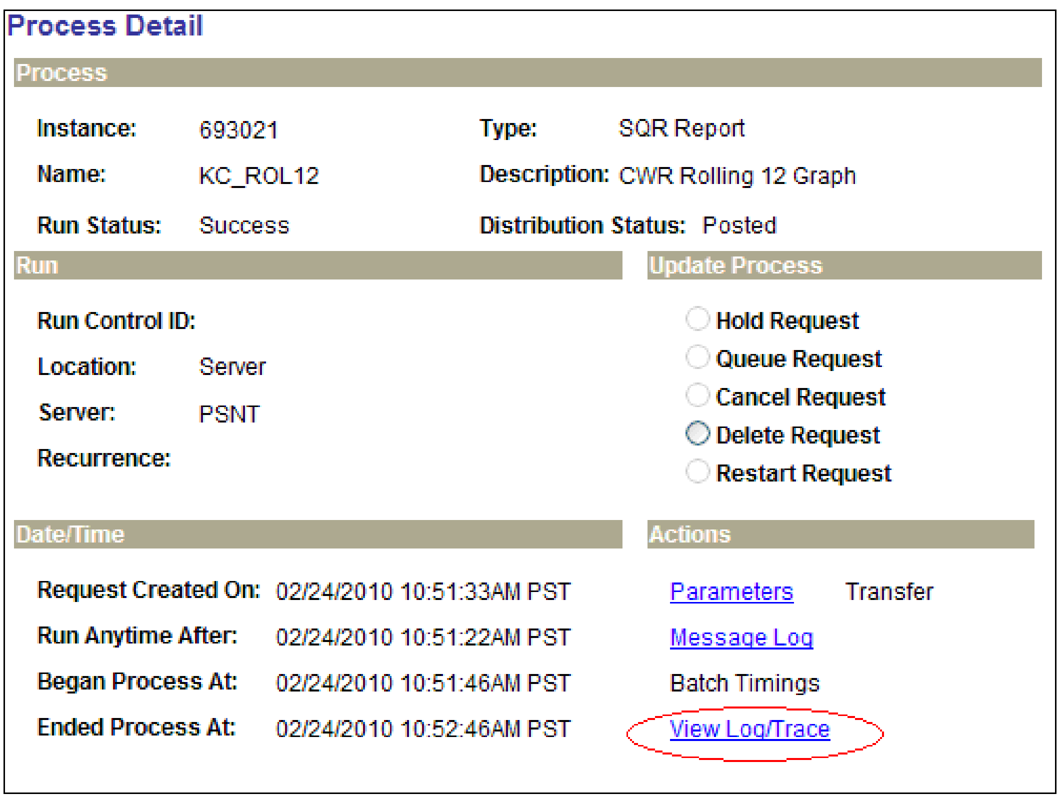
18. Step 4

Click the Refresh button until the Run Status says "Success" and the Distribution Status says "Posted". Then click on the Details link.



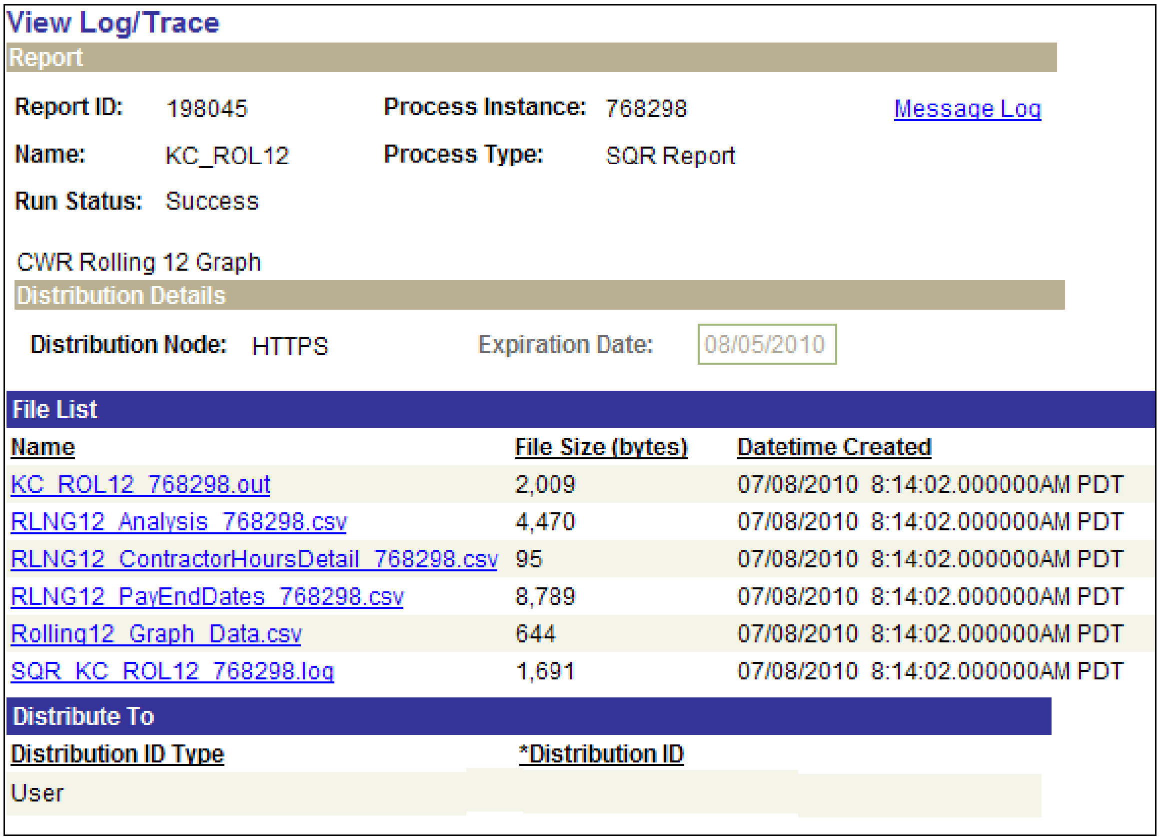
19. Step 5

Click the View Log/Trace link



20. Step 6

See the list of four .csv files that contain the information for the Rolling 12 reports.



View Log/Trace

Report

Report ID: 198045 Process Instance: 768298 Message Log

Name: KC_ROL12 Process Type: SQR Report

Run Status: Success

CWR Rolling 12 Graph

Distribution Details

Distribution Node: HTTPS Expiration Date: 08/05/2010

File List

Name	File Size (bytes)	Datetime Created
KC_ROL12_768298.out	2,009	07/08/2010 8:14:02.000000AM PDT
RLNG12_Analysis_768298.csv	4,470	07/08/2010 8:14:02.000000AM PDT
RLNG12_ContractorHoursDetail_768298.csv	95	07/08/2010 8:14:02.000000AM PDT
RLNG12_PayEndDates_768298.csv	8,789	07/08/2010 8:14:02.000000AM PDT
Rolling12_Graph_Data.csv	644	07/08/2010 8:14:02.000000AM PDT
SQR_KC_ROL12_768298.log	1,691	07/08/2010 8:14:02.000000AM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	

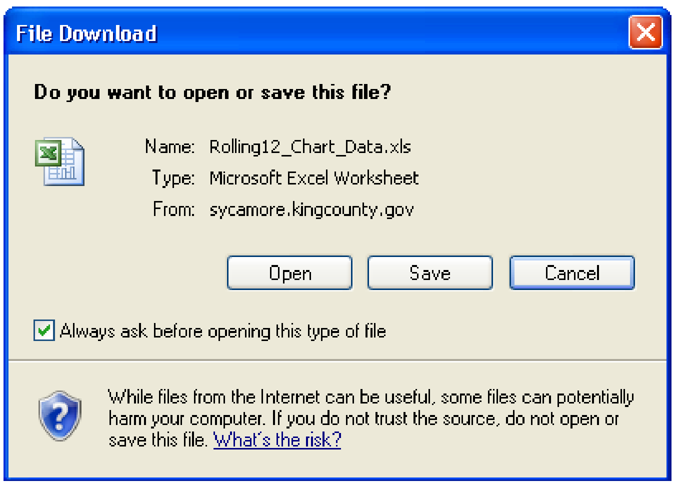
CSV File Name	Description of Use
Rolling12_Graph_Data.csv	This file will be used for the Rolling 12 Graph. If you do not intend to use the graph and just want to look at data in a spreadsheet format, use the three files listed below. You can then skip the rest of the steps in this document. If you intend to use the graph, continue with the remaining steps in this document.
RLNG12_Analysis_#.csv	This file includes much of the same information as the Rolling 12_Graph_Data.csv above but in a readable spreadsheet format. Click on the file link and then click the Open button. The file will open in Excel.
RLNG12_PayEndDates_#.csv	This file includes the actual hours by pay period for each STT employee for the rolling 12 period. This is the detail behind the hours in the RLNG12_Analaysis_#.csv file above. Click on the file link and then click the Open button. The file will open in Excel.

CSV File Name	Description of Use
RLNG12_ContractorHoursDetail_#.csv	This file includes the actual hours by day for each contract worker for the rolling 12 period. This is the detail behind the hours in the RLNG12_Analaysis_#.csv file above. Click on the file link and then click the Open button. The file will open in Excel.

21. Step 7

ALL of the files MUST be saved to your C drive.

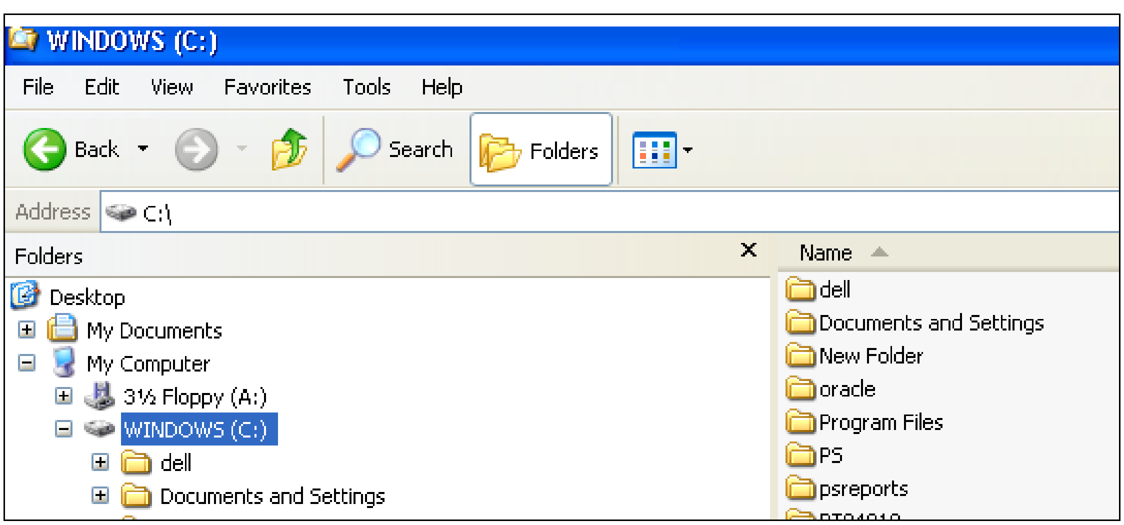
Click on the Rolling12_Graph_Data.csv file link and click the Save button.



22. Step 8

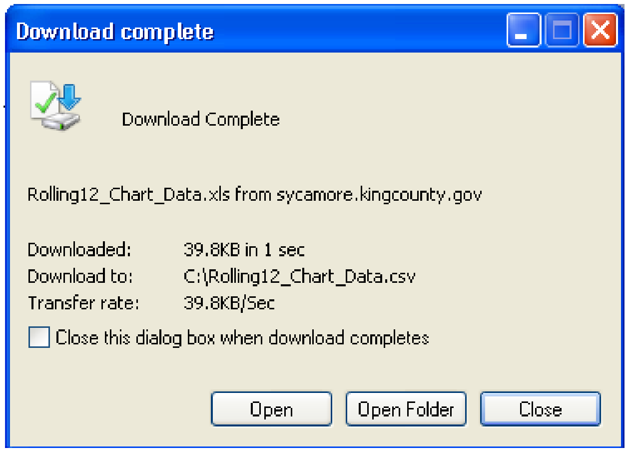
Navigate to your C drive and save each of the files with a .csv extension.

Do not change the file name. However, you must change the extension from .xls to .csv. You will note that in Step 6, you clicked on the Rolling12_Graph_Data.csv file, but in the screenshot, the file name changes to Rolling12_Graph_Data.xls. You need to save this file as a .csv. to your C drive with name: Rolling12_Graph_Data.csv.



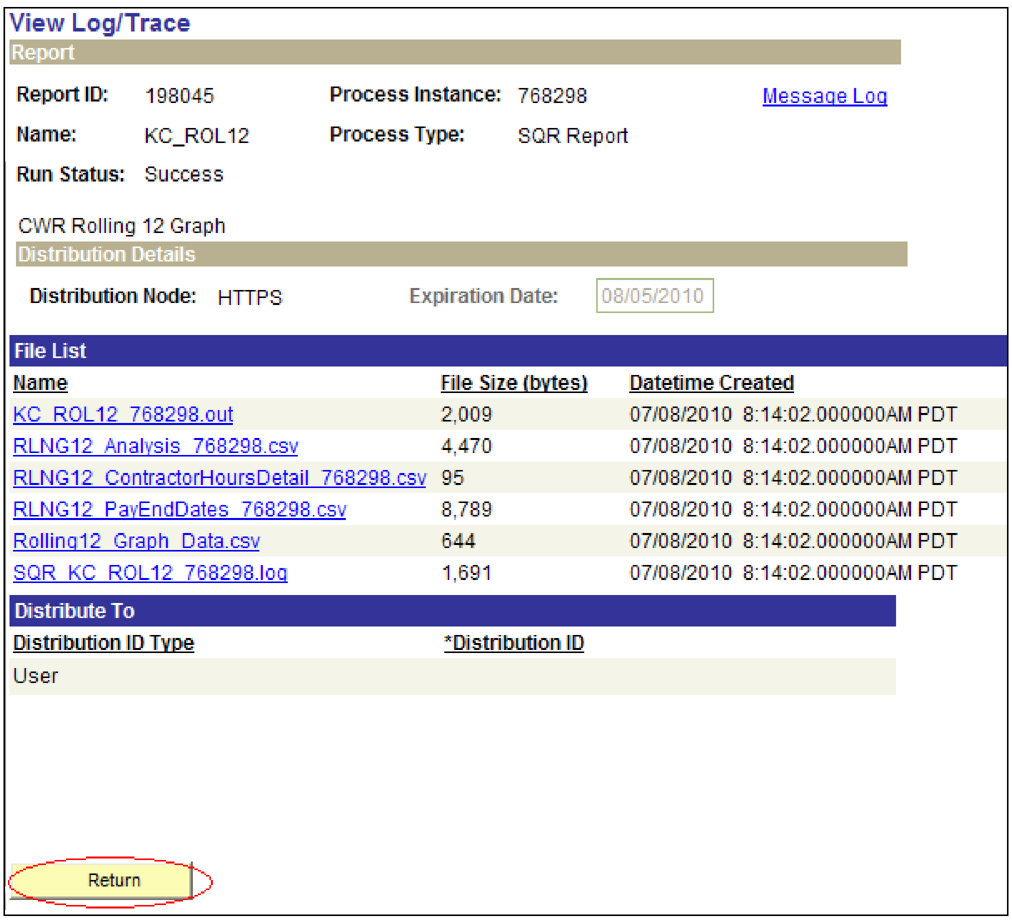
23. Step 9

Click the Close button.



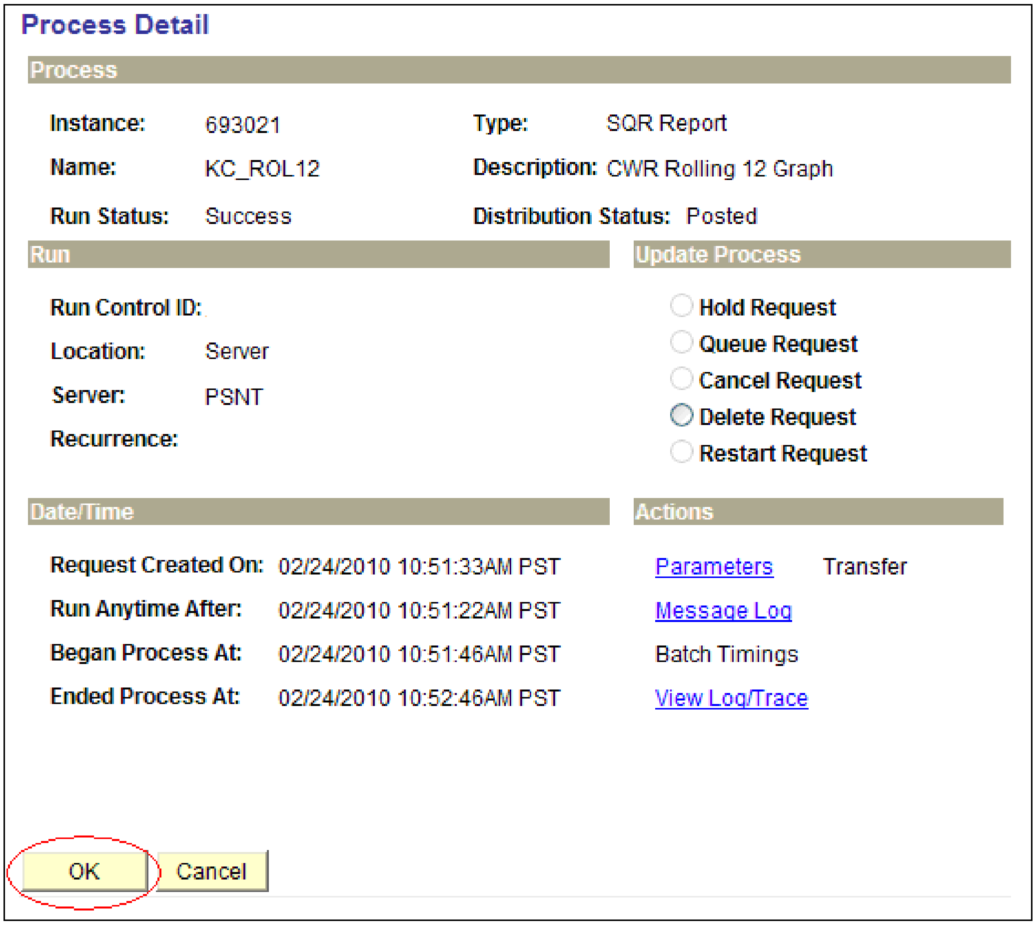
24. Step 10

After you have saved the Rolling12_Graph_Data.csv file to your C drive, scroll down and click the Return button at the bottom of the page.



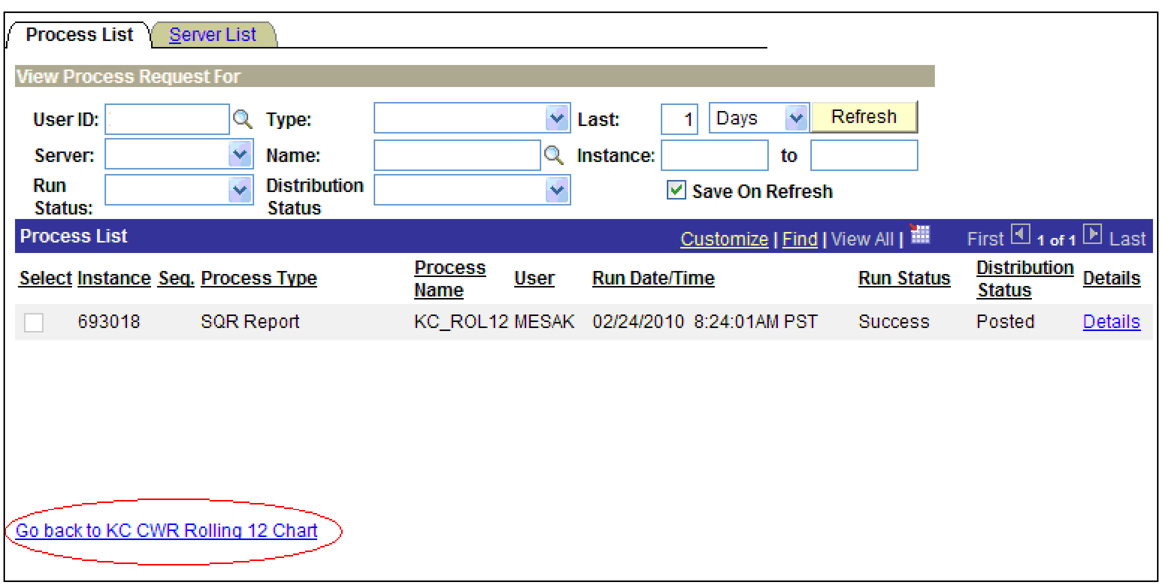
25. Step 11

Scroll down and click the OK button.



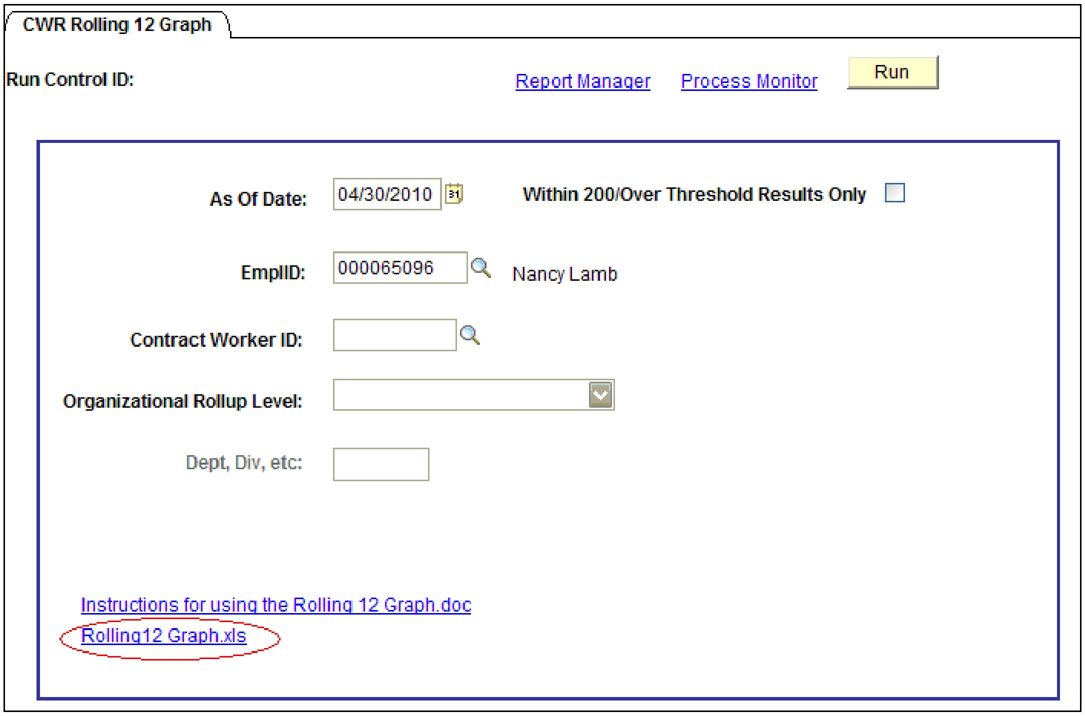
Step 12

Click the Go back to KC CWR Rolling 12 Chart link. This will bring you back to the main Run Control page.



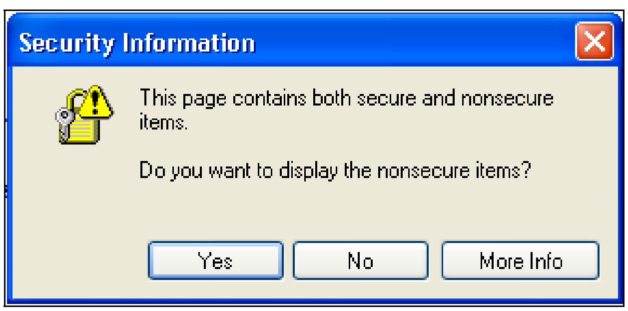
26. Step 13

Click on the Rolling12_Graph.xls link.



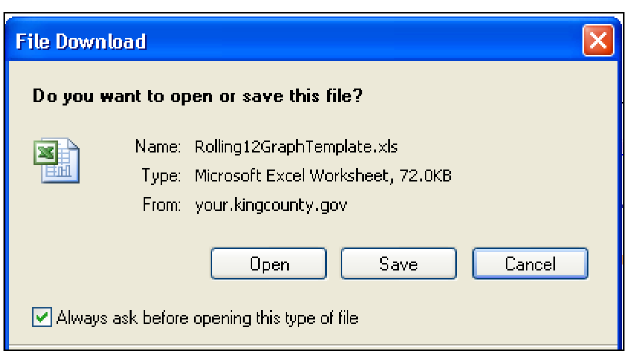
27. Step 14

    If you receive the message below, click Yes, otherwise skip to Step 15



28. Step 15

    Save the template.



Click the Save button and save the file (Rolling12GraphTemplate.xls) to your C drive.

☛ Do not change the file name! However, you must change the *extension* from .xls to .csv. You must save the file on your C drive. To ensure you always have the most recent copy of this template, you should save the template each time you run this process.

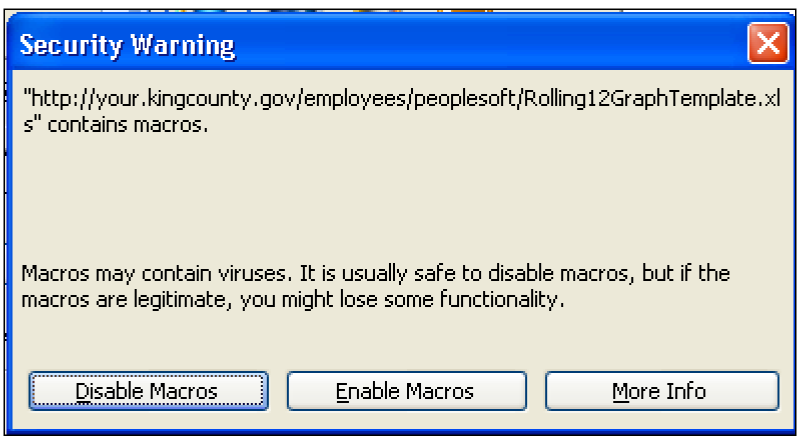
You can click the Open button, but if you do this, the spreadsheet opens in your PeopleSoft window and you lose most Excel functionality.

Possible problem:

If you receive the error message below when you open the Excel document, you will need to go back to One-Time Setup – Step 1 and 2 and change the macro security level to Low rather than Medium. Then, go back to Step 13

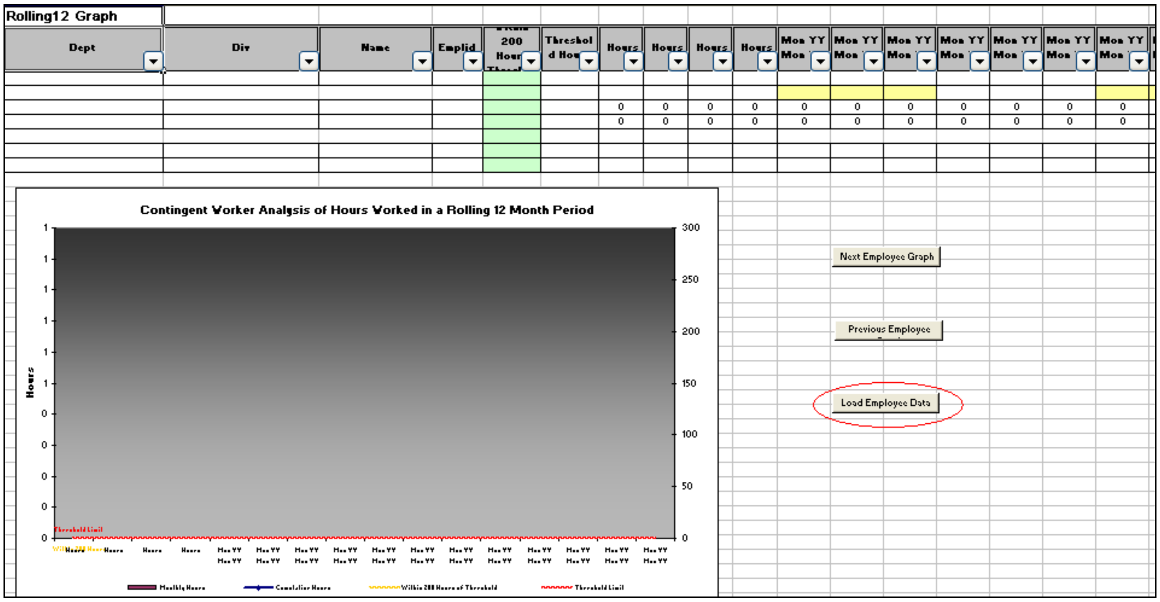
29. Step 16

Click the Enable Macros button and the spreadsheet will open



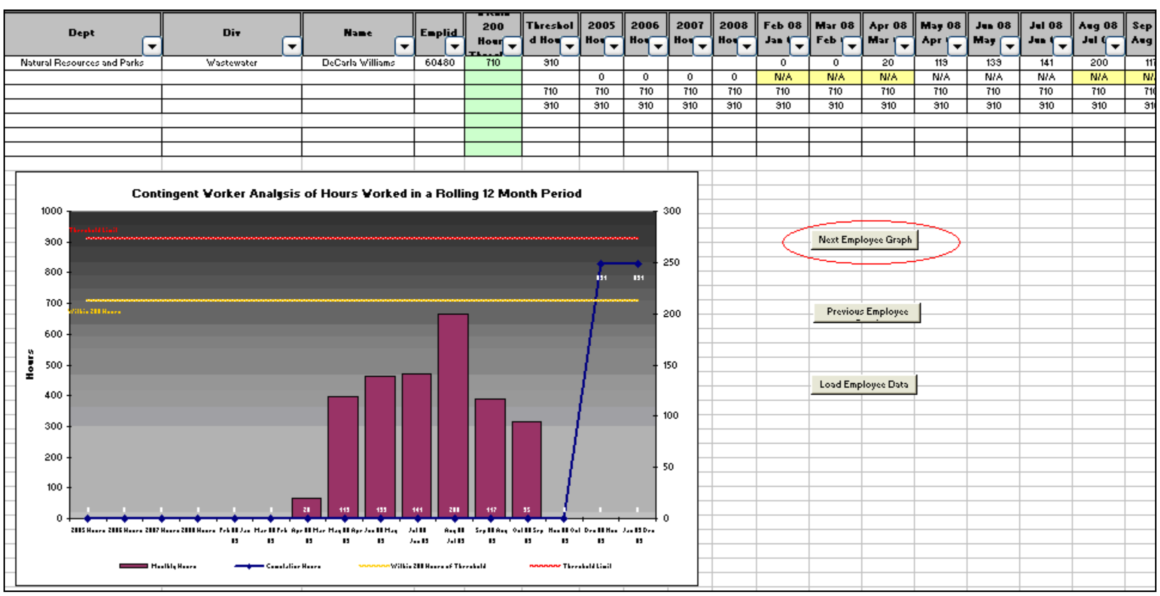
30. Step 17

Click the Load Employee Data button. When you click this button, the Rolling12_Graph_Data.csv you saved to your C drive in Step 8 will be loaded to the Rolling 12 Employee Data tab of the spreadsheet.



31. Step 18

    Click the Next Employee Graph button to view the first STT employee/contract worker's graph.



32. Step 19

    To see the next STT employee or contract worker click the Next Employee Graph button. To see the previous STT employee or contract worker, click the Previous Employee Graph button

Processing and Reconciling Contract Worker Hours

About the Vendor Hours Download and Upload

33. The departments will record contract worker hours for each day a contract worker works in an assignment. These daily hours must be entered at least once a week and will be reconciled on a monthly basis. Assignment hours for a given month must be entered by the 5th of the following month, e.g. March hours must be entered by April 5.

34. On the 5th of the following month, at the end of the day, CCQA will close the month to lock out department hours entry. CCQA will then run the download process to output the assignments and hours for a given month/year. This process breaks out each Vendor into a separate Excel file and emails each Vendor file to the Vendor report contact and to the CCQA mailbox ("RDQAT").

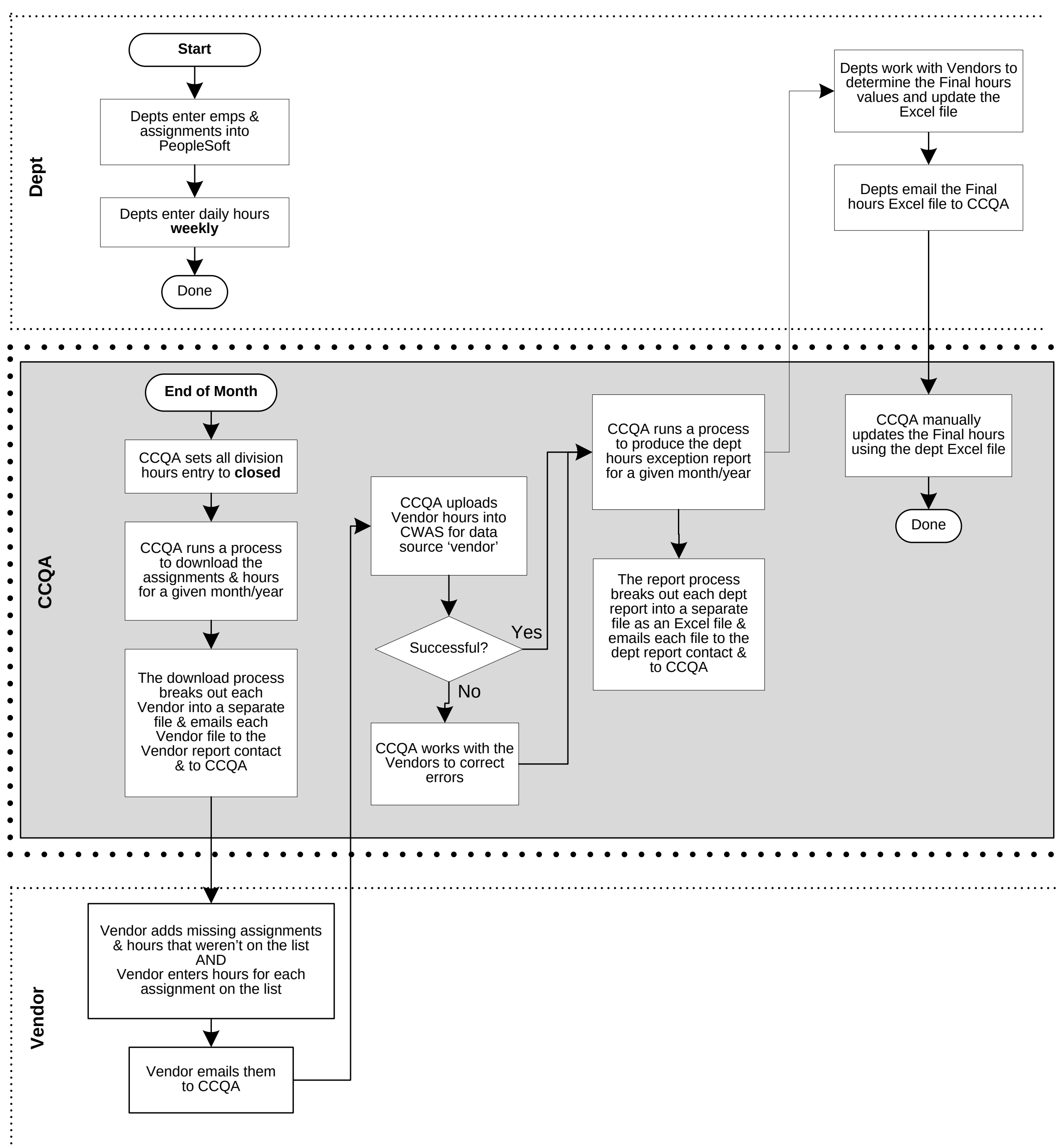
35. The Vendor enters hours for each assignment on the list in the **Hours Worked** cells. They also add missing assignments and hours that were not on the list and identify them by entering "New" for the assignment number.

36. The Vendor emails the updated Excel file back to CCQA who will upload the Vendor hours. The CCQA will run a process to list the exceptions, showing entries where the department hours do not match the vendor reported hours. Each department exception report will be emailed to the appropriate department contact. "New" assignments will be emailed as a separate document.

37. The departments work with the Vendor to determine the "Final" hours and update the exception report with the correct values. They also add the "New" assignments and hours. The department then emails the updated exception report to CCQA who manually enters the Final hours.

Contract Worker Hours Processing Flowchart

The following flowchart shows the Department, Vendor and CCQA reconciliation processes described above.


Dept
Start
Depts enter emps & assignments into PeopleSoft
Depts enter daily hours **weekly**
Done
Depts work with Vendors to determine the Final hours values and update the Excel file
Depts email the Final hours Excel file to CCQA
CCQA
End of Month
CCQA sets all division hours entry to **closed**
CCQA runs a process to download the assignments & hours for a given month/year
The download process breaks out each Vendor into a separate file & emails each Vendor file to the Vendor report contact & to CCQA
CCQA uploads Vendor hours into CWAS for data source 'vendor'
Successful?
Yes
No
CCQA works with the Vendors to correct errors
CCQA runs a process to produce the dept hours exception report for a given month/year
The report process breaks out each dept report into a separate file as an Excel file & emails each file to the dept report contact & to CCQA
CCQA manually updates the Final hours using the dept Excel file
Done
Vendor
Vendor adds missing assignments & hours that weren't on the list AND Vendor enters hours for each assignment on the list
Vendor emails them to CCQA