People and Money HR launch, November 2020
Annual leave, recruitment, approvals and notifications
For Directors of Professional Services, Implementation Group school/dept. administrators and local guides

Introduction

People and Money went live for all staff on 11 November. A change of this scale will always take a bit of time to get used to and we're aware many of you are experiencing challenges and that we've shared lots of information.

The new HR Helpline team has received a high volume of requests. We can already see some themes emerging from the types of queries coming in. This briefing gives you the information you need to try to manage some of these issues yourself, although the HR Helpline team is still available to help if needs be.

In the first instance all employees, line managers and school/dept. administrators should review 'My Knowledge' for answers to common HR queries. My Knowledge is a bank of in-system guidance which links out to relevant policies and user guides.

Topics covered in this brief are:

- HR Helpline Service Request
- Annual Leave
- Recruitment
- Approvals
- Notifications

HR Helpline Service Requests

Since the system was opened to the wider University, the HR Helpline has received more than 1,700 Service Requests.

On the basis that you would normally expect a helpdesk of this size to handle approximately 500 queries per month, we have received more than triple our anticipated business in 10 days.

These are either being managed by the team themselves or passed to the Programme Support Team for further technical support. Around 60% of the queries received can be managed by the HR Helpline team themselves, with around 40% passed on to the People and Money programme team for investigation and action.

I haven't had a response to my Service Request.

You can see the progress of your Service Request within People and Money. Pleas click on 'Help Desk' > 'Service Requests'.

Can I withdraw or cancel my Service Request?

Right now, it's not possible to cancel a Service Request once it has been submitted. If you no longer need help, please open the existing Service Request and edit the title to add the words 'PLEASE CLOSE' in the subject line. You also have the option to include any additional info you wish to have noted in the messages section. The HR Helpline team can then close that Service Request for you and concentrate on requests which still need support.

If any of the information provided in this briefing has helped you to resolve an outstanding Service Request, please update the request as noted above.

I checked the progress of my Service Request and it says 'resolved'. But I'm still experiencing the same issue and the query has been passed to another team.

The HR Helpline is the entry point for both HR queries and People and Money system issues. It is likely that the Service Request has been assessed as a technical issue and has been passed to one of our Triage teams. These teams include programme experts, HR specialists and our technical partners and meet a minimum of twice daily to investigate and respond to technical or process issues. When a Triage team has taken action to resolve your issue, you will receive an email notification from the Peopleandmoney.triage@ed.ac.uk email address with details of how it has been addressed.

When will I receive a response to my Service Request?

The team are working really hard to clear the backlog of queries. We're also analysing the Service Requests and will continue to prioritise issues relating to payroll or pay-impacting new starts, contract end dates and questions. We hope to have the back log cleared shortly. However, we'll update Heads of HR on a weekly basis on service expectations and how long it is taking to resolve requests. We'll ask them to cascade this to relevant staff.

How does the triage system prioritise Service Requests?

A three-tier model is being used:

- Priority 1: Payroll-impacting or critical - requires an immediate fix
- Priority 2: Requester cannot complete their task without support
- Priority 3: Requester has noticed something that could be improved or is incorrect and is hindering their work

Annual leave

We know from the number of queries raised that managing annual leave within People and Money remains a priority for many people. As a reminder, data gathered in August was entered into People and Money and then deducted from the staff member's overall entitlement.

So, let's say I had a holiday allocation of 250 hours and by 31 August I'd taken or had approved 100 hours, my remaining allocation on the new system would show as 150 hours. Historical leave dates (those prior to 31 August) have not been migrated, only the amount in hours.

Checking your leave balance in the People and Money system

- Any leave that has been taken or approved between 31 August and system launch on 11 November will need to be re-requested in the system either by you or by your school/dept. administrator.
- If you were on WhosOff, any future annual leave that was holding in the WhosOff system on 31 August, these dates should be in the system.
- Annual leave balance data on People and Money includes public holidays (25 and 28 December), and an additional day (7 hours) was added to cover 24 December.
- If you had planned to request 21, 22 or 23 December as annual leave, these are now respite days across the University and should not be added as leave to be taken from your balance.

I still think my balance is incorrect – what should I do?

If you've checked the annual leave dates and public holidays in People and Money and still think the balance is incorrect, you should raise this with your line manager or school/dept. administrator.

If you agree together that the balance is incorrect, you can do one of two things. Your school/dept. administrator can change the balance directly or, alternatively, your line manager can raise a Service Request with the HR Helpline. The Service Request should include the following information:

- Name

- Staff number
- Assignment number
- Current balance in hours
- Updated balance in hours as of 31 December, taking into account annual leave already booked

As we have four weeks left of the 2020 annual leave cycle, the priority will be to ensure that the balance is showing correctly by the end of the year. This task which can now be completed by school/dept. administrators.

The HR Helpline team can amend leave balances using the figures outline above but cannot review or confirm calculations. School/dept. administrators now have the access and information to be able to resolve these issues.

I can't see my team members' annual leave.

You should be able to view your teams' annual leave in the 'Team Schedules' tile.

Please review the user guide How to View and Approve/Reject Leave Requests.

If, after reading this and taking any necessary action, you're still unable to view your team's annual leave, please raise a Service Request listing the employees that you would expect to see.

Recruitment

As part of the transition to People and Money, a short recruitment advertising freeze was implemented during October. Some interim processes were then introduced during the period between the system going live for HR Operations colleagues on 28 October and all staff on 11 November.

As a result, we identified a small number of process gaps after the system was launched. These were predominantly where user guides did not reflect the interim processes, or it was unclear that some activity needed to be passed to HR Operations.

We are closing this gap and have taken the following actions:

- Creation of a recruitment flow chart, shared with local guides
- Development of additional user guides and refinement of current ones
- Q&A sessions for local guides

The previous recruitment freeze has inevitably led to a large volume of recruitment activity in this immediate post go-live period. The HR Operations team's top priority has been to process changes in time for the payroll cut-off on 17 November.

Some answers to other recent recruitment-related questions are outlined below:

I can't find migrated data from eRecruitment.

Applicant information from eRecruitment has not been migrated to People and Money, so you need to continue to access the eRecruitment system for details of historic vacancies, unsuccessful candidates etc. The position details for in-flight recruitment were added to People and Money, which allow you to add the successful candidate details into the new system.

You don't need to seek re-approval for any previously approved vacancies or reissue offers to candidates where the selection process was completed during the recruitment freeze. Once you've completed the approval stage, you'll need to ensure that there is adequate FTE available on the position the successful candidate is to be appointed to.

Positions for in-flight recruitment were set up prior to the People and System going live. You don't need to raise a job requisition in People and Money to 'link' the person to, you just need to add them directly to People and Money as a 'Pending Worker'.

For internal candidates who were in-flight when eRecruitment went down, you'll need to complete an 'Internal transfer to a non-advertised post' Service Request form so that HR Operations can manually transfer them.

In future, as internal recruitment is initiated in People and Money and roles advertised, the system will automatically move them to processing when the member of staff accepts the job in People and Money. Direct hires or people such as those named on grants will continue to be processed by HR Operations as internal transfers to non-advertised posts.

How do I raise a contract for an internal hire, direct appointment or non-advertised role?

Direct hires are carried out by school/dept. administrators. Please read the How to hire outside the recruitment module user guide for full details.

How do I give my new hire access to People and Money?

Please refer to the How to request contract generation and How to share systems access with pending workers user guides.

There is no change to the UUN process and this is captured in the pre-boarding checklist.

When I've tried to approve/reject a job requisition from email, I receive an error message.

We've seen this issue cropping up for colleagues that have more than one email linked to their Outlook account. When you hit 'reject' or 'reply', an email pops up to send the response back to the system. Please check the 'from' field is populated with your personal ed.ac.uk account.

Please use your personal ed.ac.uk account for system transactions rather than any shared or group email address or complete the approval directly in People and Money rather than via the email, to ensure the system functions as expected.

Approvals

Approvals follow the hierarchy of the employee who needs a task approved. There have been one or two technical issues which has resulted in the approvals getting stuck somewhere the hierarchy. Fixes already in place include:

1. **Approvals previously stopping at the Finance Manager.** This issue is now fixed and working correctly.
2. **People unable to view recruitment approval hierarchy.** This issue is now resolved and the person initiating the request will be able to view the approval hierarchy. This can be done by accessing the bell icon, selecting 'Show All' and then 'Created By Me'. Please note this does not show *where* the approval is sitting in the hierarchy. Viewing the approval chain in real time has been captured as an area for future improvement.

There remains a number issues under active management within the Triage process. Most of these have been caused by data inconsistencies. These types of issues need to be investigated by the Programme Support Team so you should continue to raise a Service Request. If you believe an approval is not moving or is being sent to the wrong team, please include this in the Service Request title field.

However, the bulk of new queries are due to lack of understanding of how the system works and we are working to help to make things easier to understand. Please continue to search My Knowledge for guidance with our new systems and processes first of all.

I'm a Finance Manager, and I'm still having problems managing approvals despite the fix.

Job requisitions first go to individuals that have been assigned a Finance Manager area of responsibility. These work on a first responder basis, so these errors are sometimes happening because one of the other Finance Managers has already approved/rejected the job requisition.

Alternatively, this may be because your Area of Responsibility needs corrected. If so, please raise a Service Request.

I received a strange error message when I tried to complete an approval directly from an email.

We're seeing an error for people that have multiple emails linked to their Outlook account. Please check the 'From' address in the email is defaulting to your personal ed.ac.uk account. Otherwise, the system doesn't recognise the address and returns an error.

I'm not receiving any notifications.

If you're a Finance Manager, this may be because your 'Area of Responsibility' needs to be corrected. For others, this is down to the line management hierarchy the approvals go through. The approval is either with someone in the line management chain waiting to be approved, or there is an issue with the line management data itself that needs to be resolved. The Directors of Professional Services can advise what Area of Responsibility was requested for school/dept. administrators and Finance Managers, so it's worth checking with them in the first instance. If a change is needed, please send a Service Request.

Finally, recruiters should also make sure they select 'Edinburgh University Group' in the 'Organisation' field when setting up job requisitions.

Notifications

Can we address the volume of notifications?

We're aware from a number of discussions that the volume of People and Money notifications is an area many people are keen for us to review.

We've changed the number of absence management email notifications. Previously, three emails were generated – one for the request to be actioned and two additional emails; an 'FYI' and 'Submission Confirmation'. As an approver, you should now only receive one email – the one that requires action.

The People and Money team will also be undertaking a review of system notifications in early December as more data becomes available. Your feedback on notifications will be included and any recommendations made will be subject to the programme's change process and appropriate approvals.

Can I switch off my notifications?

Email notifications are critical unless you log into the People and Money system on a daily basis. If you don't monitor notifications, tasks critical to your role and the management of your teams and budgets may be missed or delayed.

While you can't turn notifications off from the People and Money side, you can manage the notifications you receive in Outlook. Please read the My Knowledge article 'How do I manage email notifications within People and Money?' for details on how set up rules in Outlook to help you organise the incoming emails.

Work schedules

The introduction of work schedules is a completely new area for the University and we've received a variety of questions on this. These range from queries about people's working pattern changing to where they can find their work schedules.

I have a new member of the team join a few week ago but their work schedule is not showing.

The data relating to work schedules was collated in August and we've therefore identified a number of employees who do not have a work pattern. We're working to close this data gap with the support of line managers and the Programme Support Team.

Final thoughts

We appreciate it has been a tough few weeks and we would like to thank everyone for their hard work and support. Remember:

- Please use My Knowledge whenever you can to try and find an answer to your question
- Please continue to speak to your local guide if you need support with accessing guidance
- If you have any feedback on the user guides or My Knowledge, please let us know by contacting the SEP Human Resources mailbox SEP.HR@ed.ac.uk or your local guide.