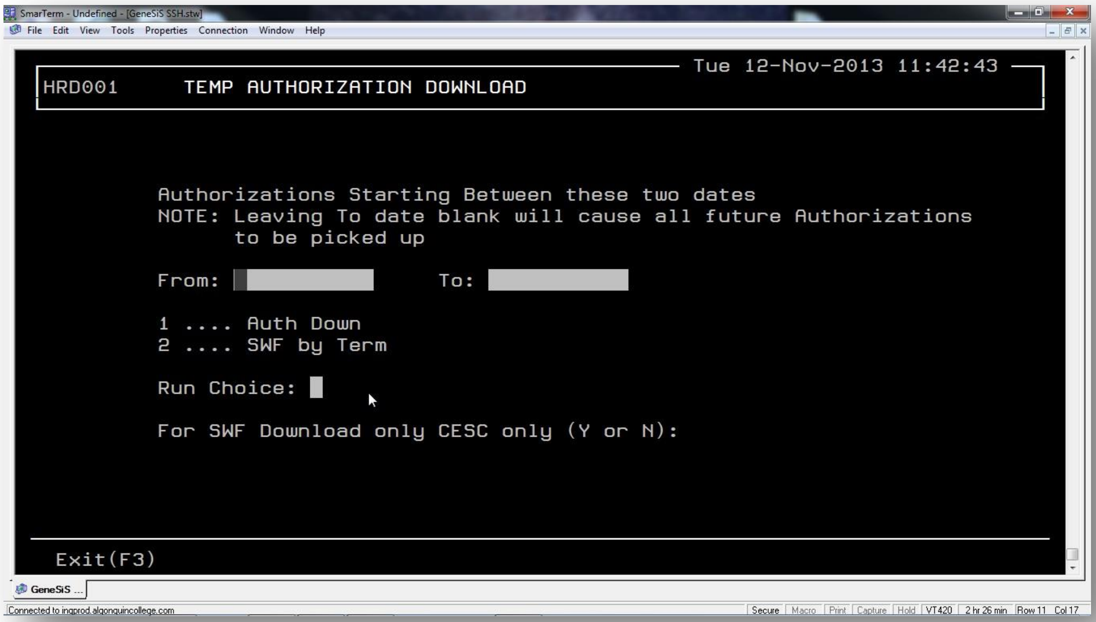
Part-time Payroll Changes:

Guide for Budget Officers

The purpose of the guide is to teach you how to mail merge employees information into contracts. The process involves two sections: organizing the data and mail merging.

Retrieving part-time payroll data

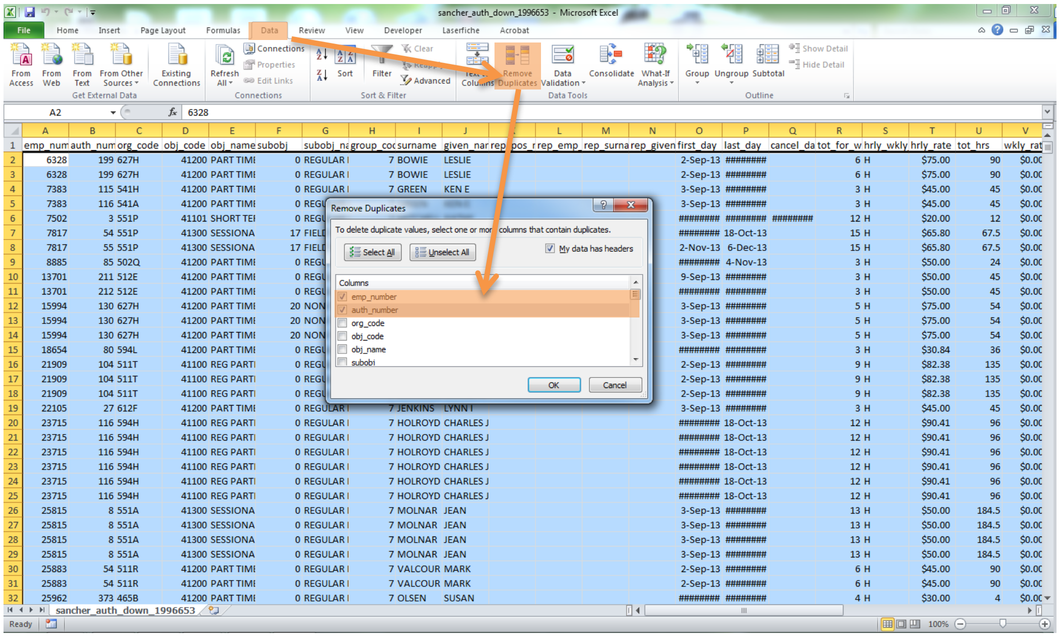
1. To download the part-time employee data that you will need to input into the contracts, log onto HRIS and go to screen "HRD001 – Temp Authorization Download". Enter the date range that you want to pull the information form, in the format of "01-Jan-2014". For Run Choice, put in "1". And then hit enter to download the CSV file with all of the part-time employee information for your area. Wait approximately 5 minutes for the file to download to your "N:// drive", into the "From_ITS" folder.



2. Open the .csv file in Excel. The file name will appear as follows: "username_auth_down_#######.csv."

3. "Save as" an Excel workbook (xls/xlsx). Save this copy in your "N://" drive.

4. Now you will need to make some changes to the spreadsheet in order to prepare it for the mail merge. To start, go to “Data” on the top navigation, and select “Remove Duplicates”. In the pop-up, check “emp_number” and “auth_number” then click “Ok”.

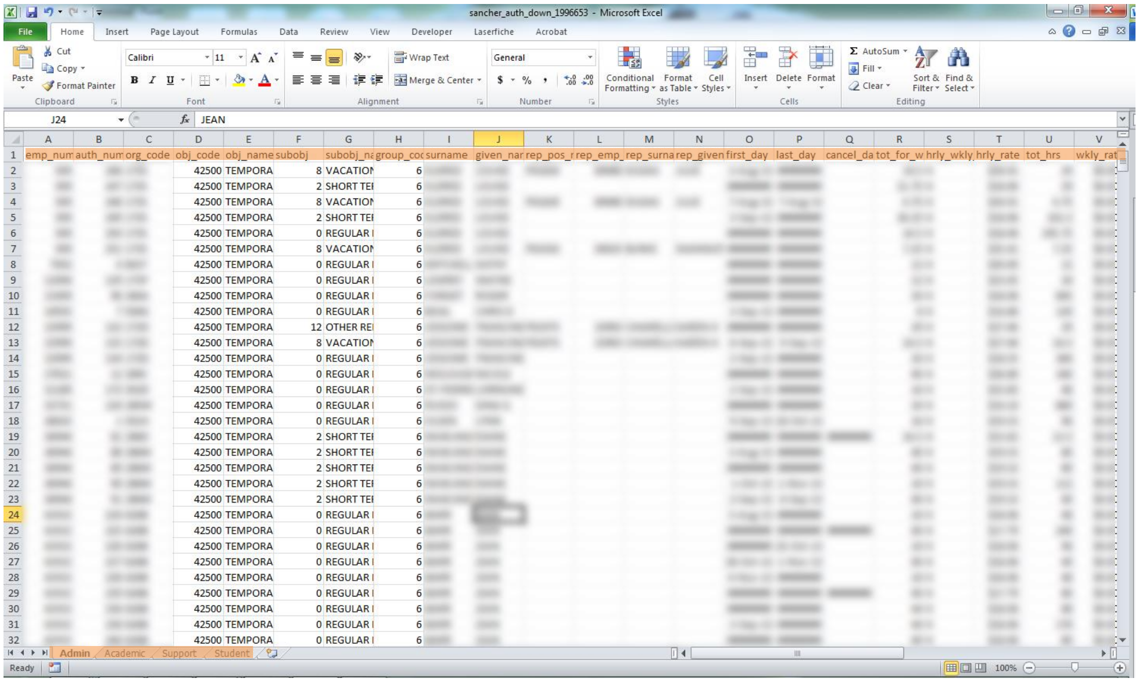


This will remove all of the duplicate records – i.e. it will eliminate records for each course section being taught. This will create a more streamlined spreadsheet, eliminating multiple contracts for the same authorization. Each individual authorization will generate a contract.

5. Once you have cleansed the data, you need to sort it by employee group type. Click on “Data”, click “Sort” and sort by “group_code”. This will sort your data into four numeric group codes. The definition of each group code is outlined below:

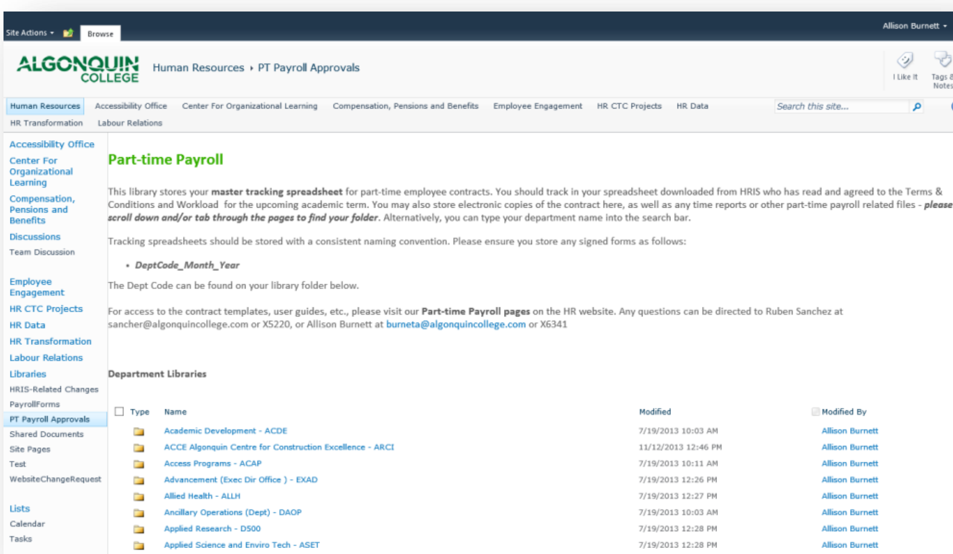
Group Code	Part-time Employee Group Type
5	Part-time Admin
6	Part-time Support
7	Part-time Academic
8	Part-time Student

6. Creating separate worksheets for each Employee Group Type will allow us to easily complete the mail merge for each group, as each employee type has its own contract template. Copy and paste each Group Code into a new worksheet within the same file. Make sure to copy over the headers to each worksheet. Do NOT change the header titles. Rename each tab according to the Group Type (e.g. Admin, Support, etc).



7. Add a column to the end of the spreadsheet called "Status". This column will be used to track the status of signed contracts.

8. Save the spreadsheet to your department's folder in the HR Part-time Payroll [SharePoint]() site. We recommend retitling the spreadsheet to something that is intuitive and easy for you to remember.

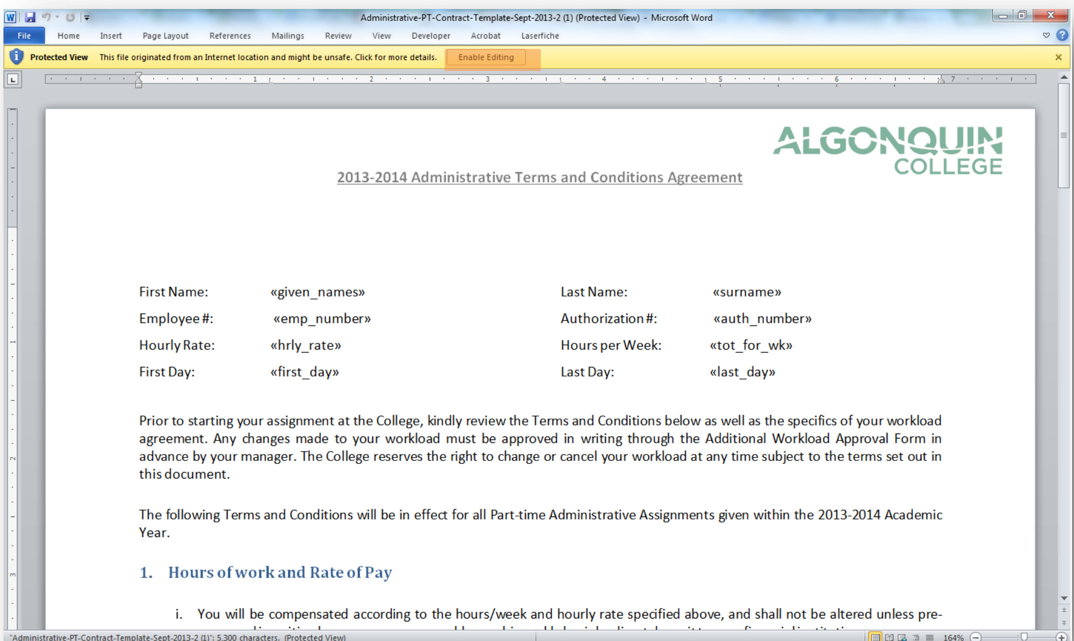


Populating the Contract template using a Mail Merge

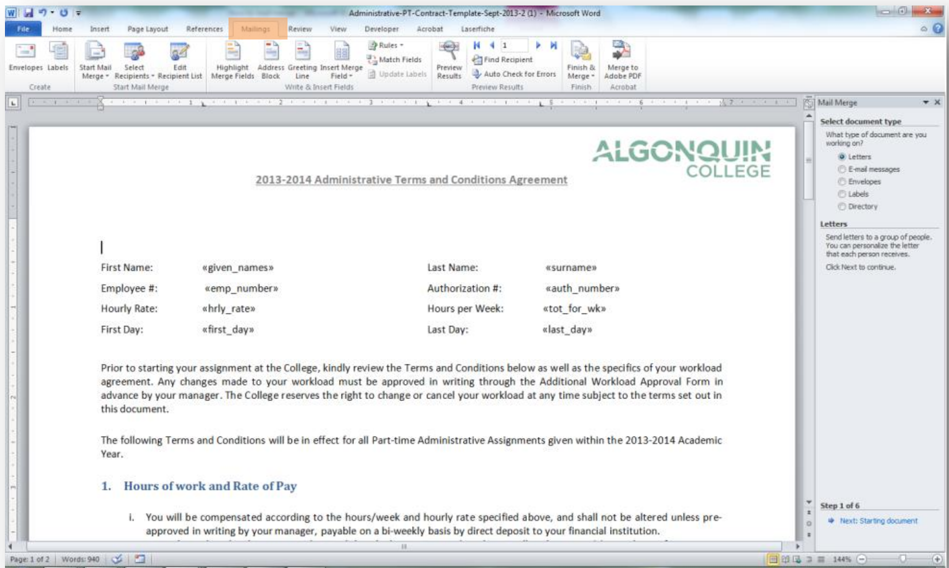
Now that we have the part-time employee data organized and sorted, we can move to the next step in the process, which is to create the actual contracts.

1. Download the appropriate contract template that correlates with your employees from the contracts page. Each employee group type has a different contract template, all of which are found on the webpage. For this manual, we will use the part-time Admin contract template. Open it from the webpage.

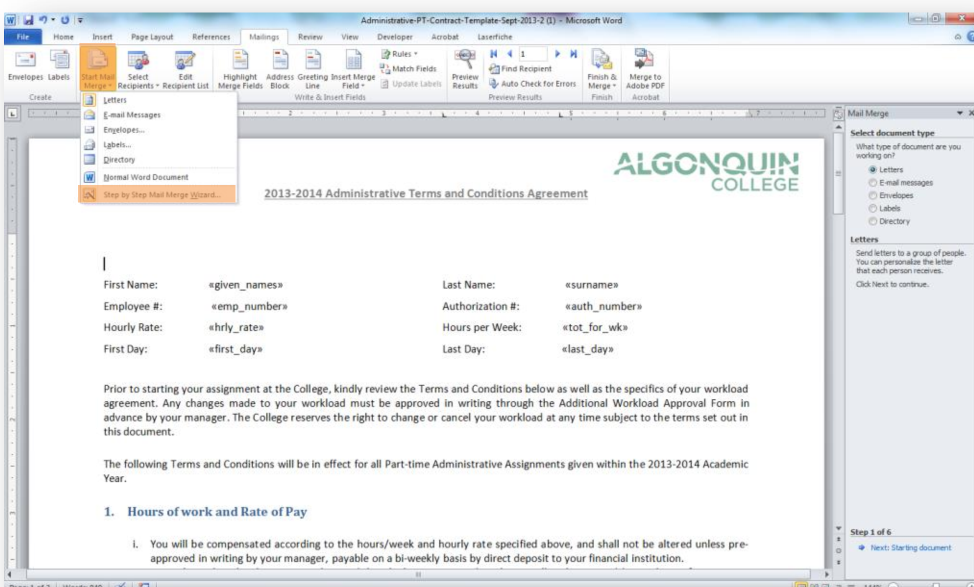
2. When the template opens in Word, you will need to enable editing in the word document if it is disabled by clicking on the “Enable Editing” button at the top of the page.



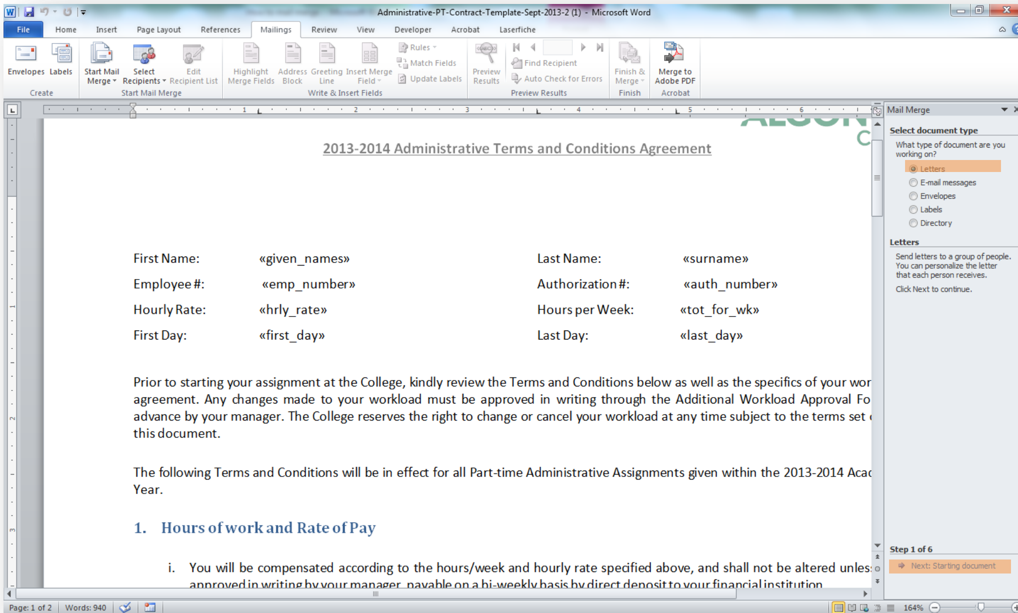
3. Click on the “mailings” tab to start the mail merge.



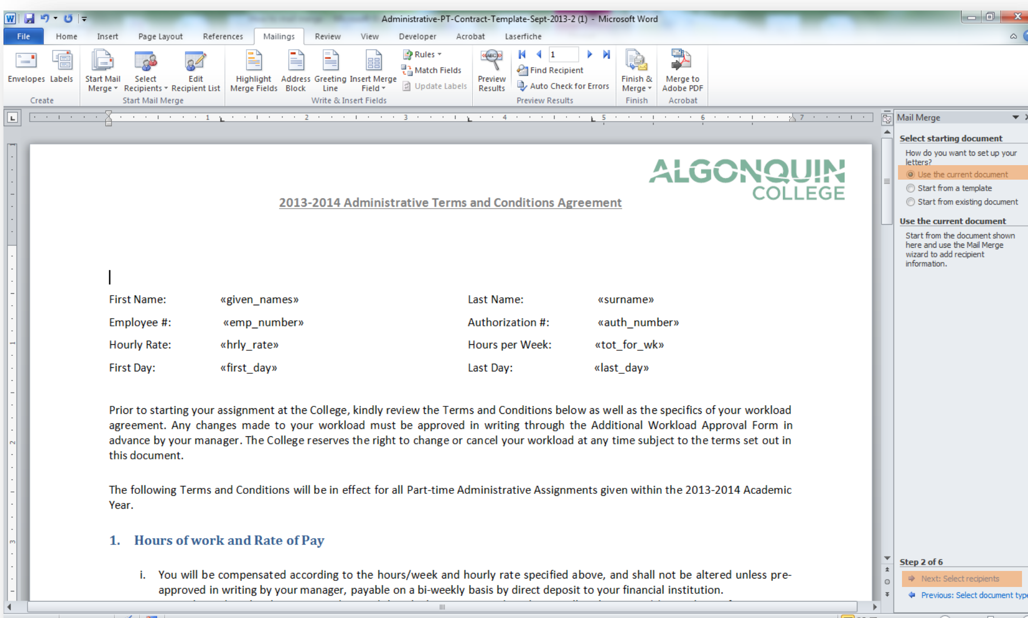
4. Click on “Start Mail Merge” then click on “Step-by-Step Wizard”.



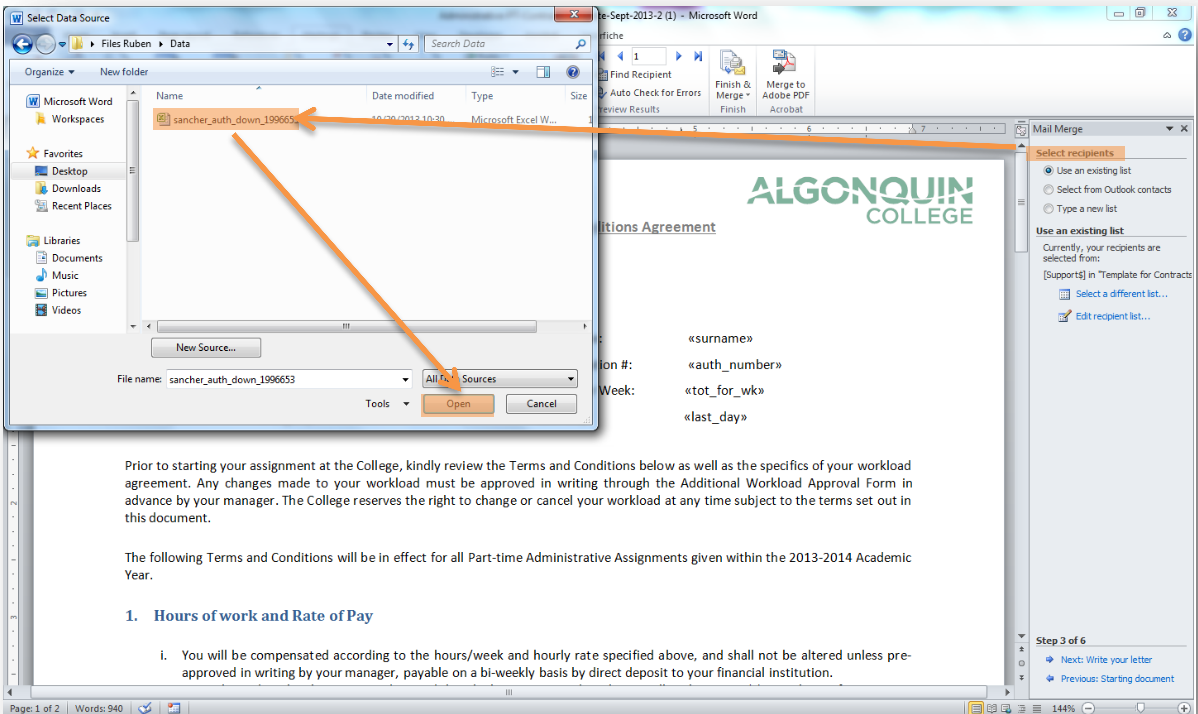
5. On the right hand side, select “Letters” if not already selected. Then click “Next: Starting Document” at the bottom of the Mail Merge column (Step 1 of 6)



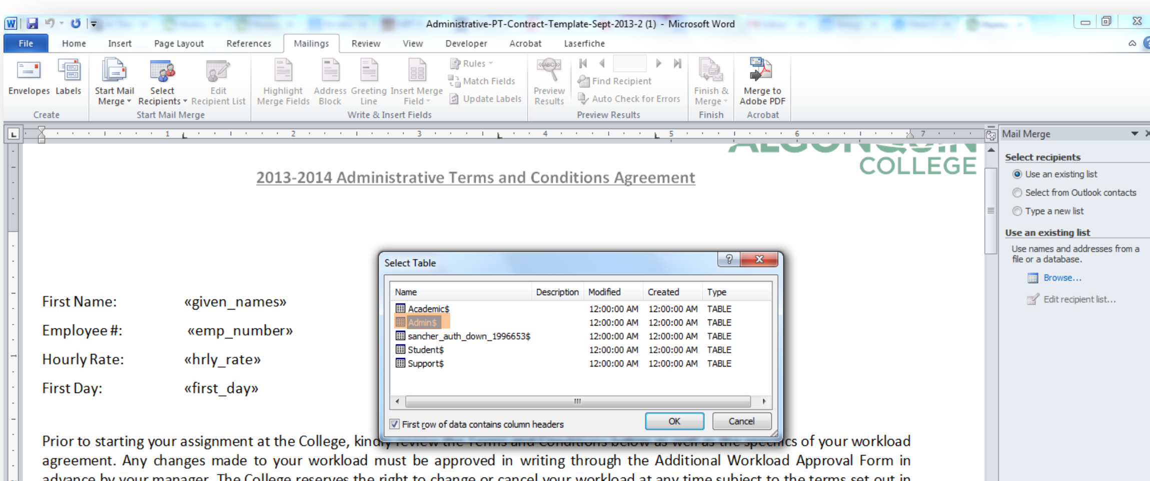
6. Then select “Use the current document” then select “Next: Select Recipients” to select the contacts (Step 2 of 6).



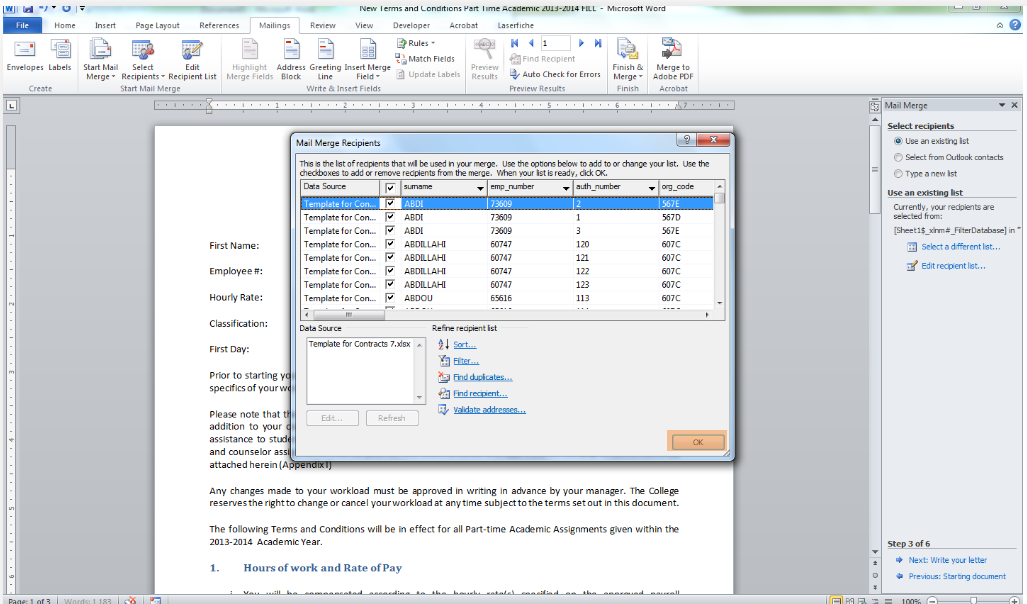
7. Select “Use an existing list” then click “Browse” to find your list of part-time employee data. The list is saved as an xls or xlsx document, under whatever file name you gave your data from HRIS. Find your workbook, then click “Open”.



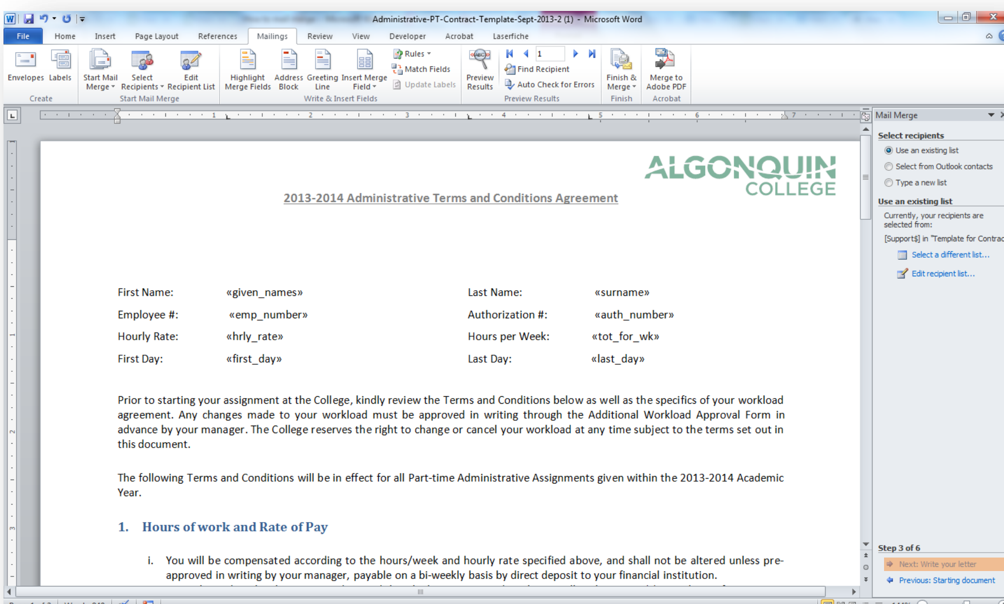
8. Select the employee group type you will be creating contracts for, then click “Ok”. In this example, we are choosing the “Admin” employee group. Recall that the tables listed in this menu are the titles that you gave each tab in your workbook.



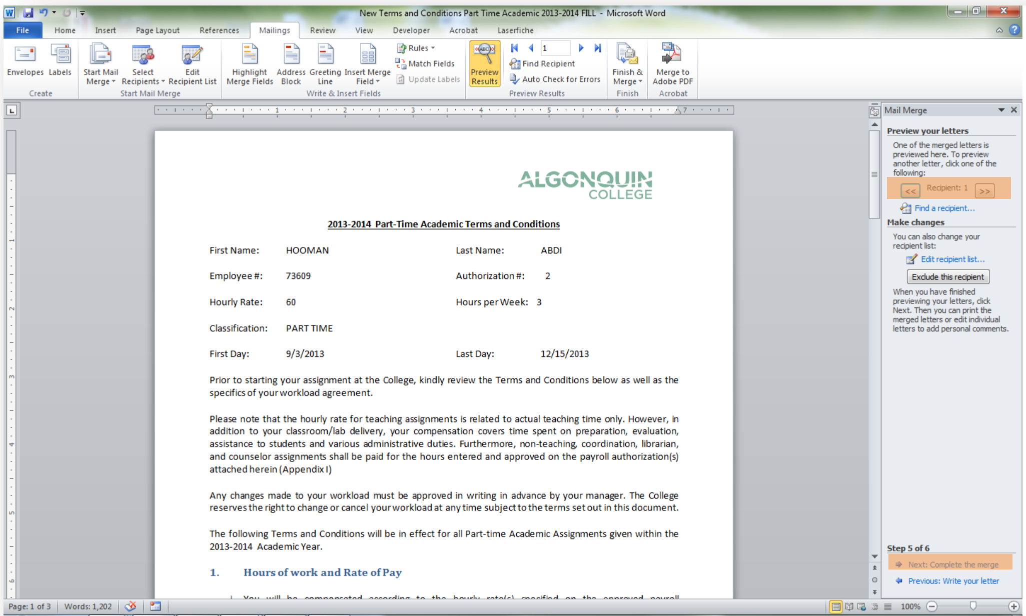
9. After list compiles your list, click “ok”. This will pull forward all of the employee records in your worksheet.



10. Then click “Next: Write your letter” to populate the fields in the contract (Step 3 of 6)



11. Click “Next: Preview your letters”. This will now pull the data in from the tab you specified from the Part-time Contracts Excel file. You can view the contracts you have just created.



12. When satisfied with your results, click “Next: complete the merge”. You can now print each automatically filled document or edit individual letters. Note than if they original excel file did not have emails (a recipient list); you will not be able to send each mail merged file to its owner.