

Part-time Payroll Changes: **Guide for Budget Officers**



Step-by-Step process of Creating Contracts through a mail-merge

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.

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SmarTerm - Undefined - (GeneSIS SSH.Lst)
File Edit View Tools Properties Connection Window Help
Tue 12-Nov-2013 11:42:43
HRD001  TEMP AUTHORIZATION DOWNLOAD

Authorizations Starting Between these two dates
NOTE: Leaving To date blank will cause all future Authorizations
to be picked up

From: [ ] To: [ ]

1 .... Auth Down
2 .... SWF by Term

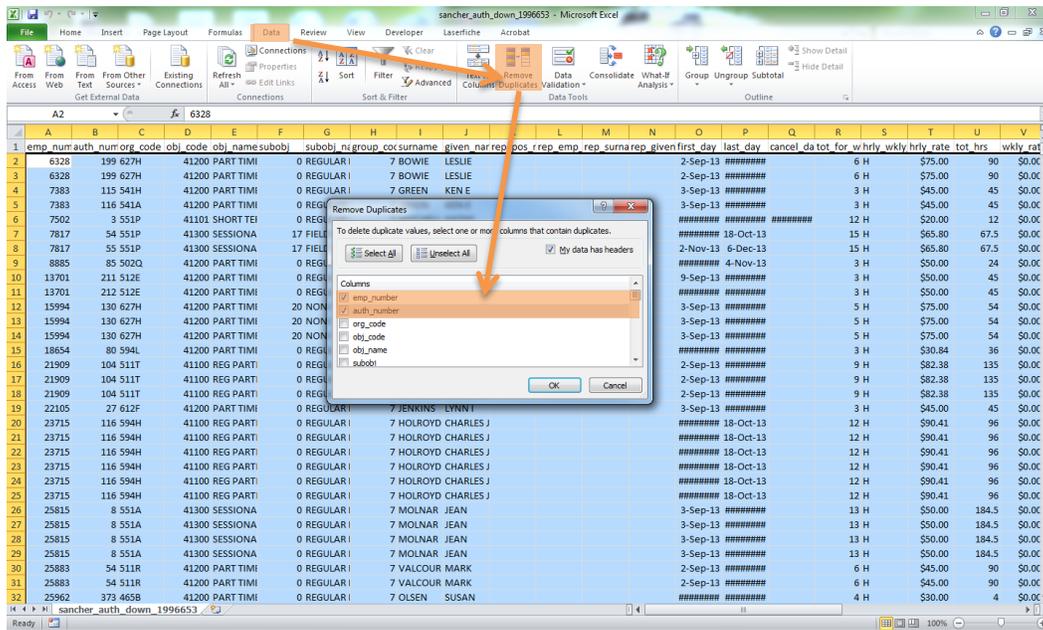
Run Choice: [ ]
For SWF Download only CESC only (Y or N):

Exit (F3)
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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.



- 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.

- 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

- 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).



The screenshot shows a Microsoft Excel spreadsheet with the following columns: emp_num, auth_num, org_code, obj_code, obj_name, subobj, subobj_group, coc, surname, given_nar, rep_pos, r_rep, emp_rep, sum_rep, given_first_day, last_day, cancel_da_tot, for_w, hrly_wkly, hrly_rate, tot_hrs, and wkly_rat. The data rows show various employment types such as VACATION, SHORT TEI, and REGULAR I.

emp_num	auth_num	org_code	obj_code	obj_name	subobj	subobj_group	coc	surname	given_nar	rep_pos	r_rep	emp_rep	sum_rep	given_first_day	last_day	cancel_da_tot	for_w	hrly_wkly	hrly_rate	tot_hrs	wkly_rat	
42500	TEMPORA	8	VACATION	6																		
42500	TEMPORA	2	SHORT TEI	6																		
42500	TEMPORA	8	VACATION	6																		
42500	TEMPORA	2	SHORT TEI	6																		
42500	TEMPORA	0	REGULAR I	6																		
42500	TEMPORA	8	VACATION	6																		
42500	TEMPORA	0	REGULAR I	6																		
42500	TEMPORA	0	REGULAR I	6																		
42500	TEMPORA	0	REGULAR I	6																		
42500	TEMPORA	12	OTHER REI	6																		
42500	TEMPORA	8	VACATION	6																		
42500	TEMPORA	0	REGULAR I	6																		
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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.

The screenshot shows the Algonquin College HR website. The main heading is "Part-time Payroll". Below it, there is a description: "This library stores your master tracking spreadsheet for part-time employee contracts. You should track in your spreadsheet downloaded from HRIS who has read and agreed to the Terms & Conditions and Workload for the upcoming academic term. You may also store electronic copies of the contract here, as well as any time reports or other part-time payroll related files - please scroll down and/or tab through the pages to find your folder. Alternatively, you can type your department name into the search bar." Below this, there is a section for "Department Libraries" with a table listing various departments and their last modified dates.

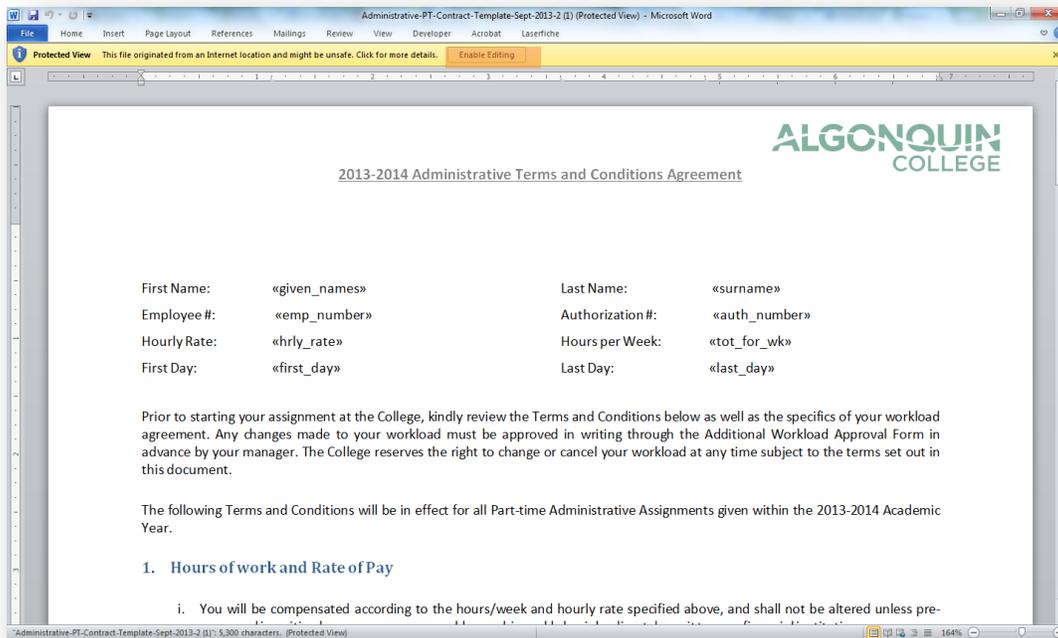
Type	Name	Modified	Modified By
	Academic Development - ACDE	7/19/2013 10:03 AM	Allison Burnett
	ACCE Algonquin Centre for Construction Excellence - ARCI	11/12/2013 12:46 PM	Allison Burnett
	Access Programs - ACAP	7/19/2013 10:11 AM	Allison Burnett
	Advancement (Exec Dir Office) - EXAD	7/19/2013 12:26 PM	Allison Burnett
	Allied Health - ALLH	7/19/2013 12:27 PM	Allison Burnett
	Ancillary Operations (Dept) - DAOP	7/19/2013 10:03 AM	Allison Burnett
	Applied Research - D500	7/19/2013 12:28 PM	Allison Burnett
	Applied Science and Enviro Tech - ASET	7/19/2013 12:28 PM	Allison Burnett



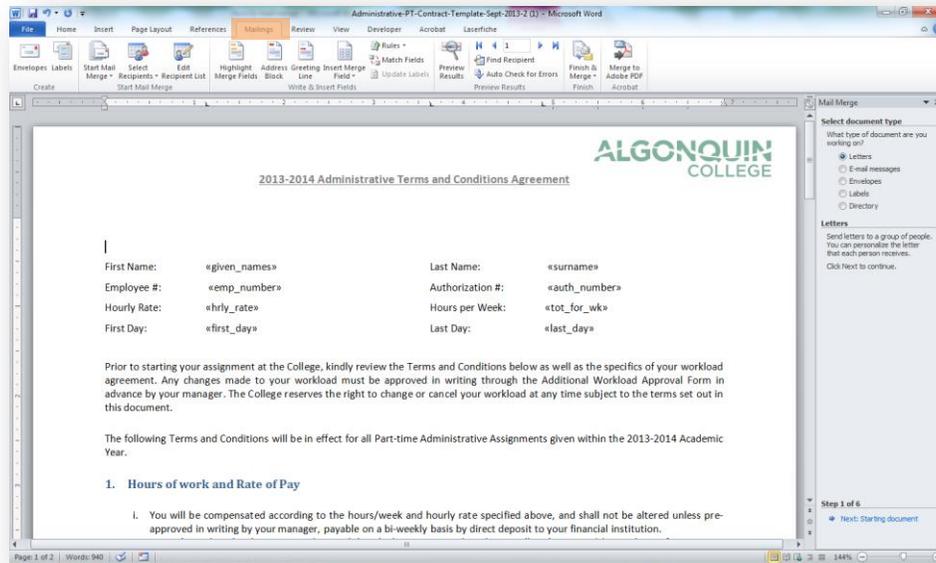
Populating the Contract template using a Mail Merge

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.

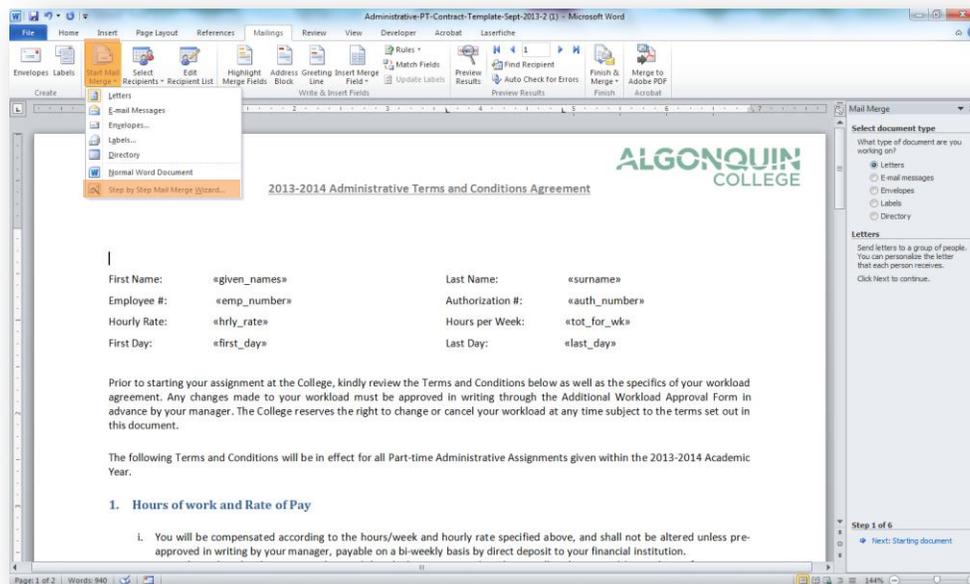
1. Download the appropriate contract template that correlates with your employees from the [contracts page](#). Each employee group type has a different contract template, all of which are found on the webpage. For this manual, we will use the part-time Admin contract template. Open it from the webpage.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



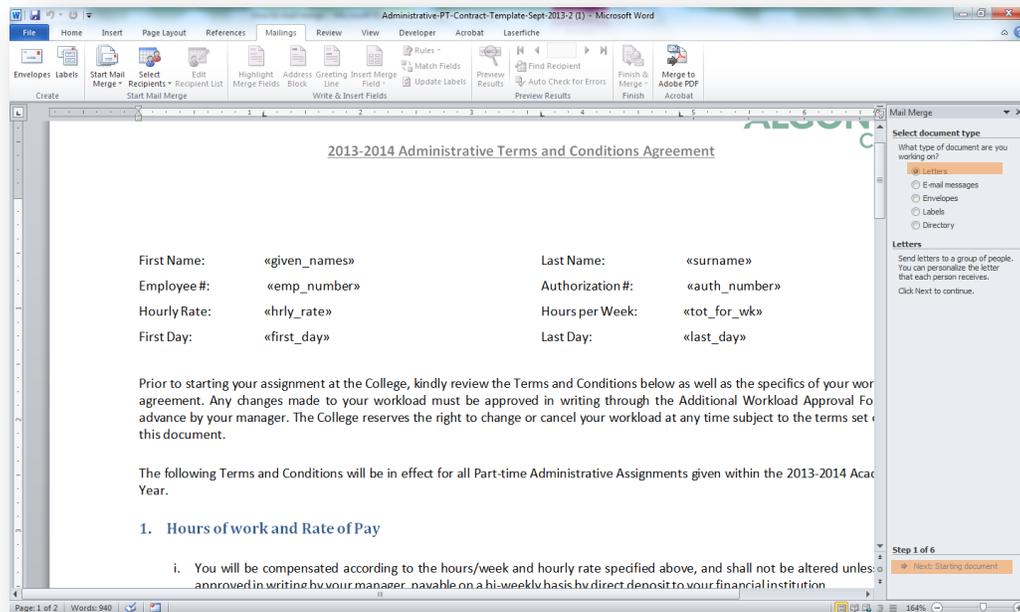
3. Click on the “mailings” tab to start the mail merge.



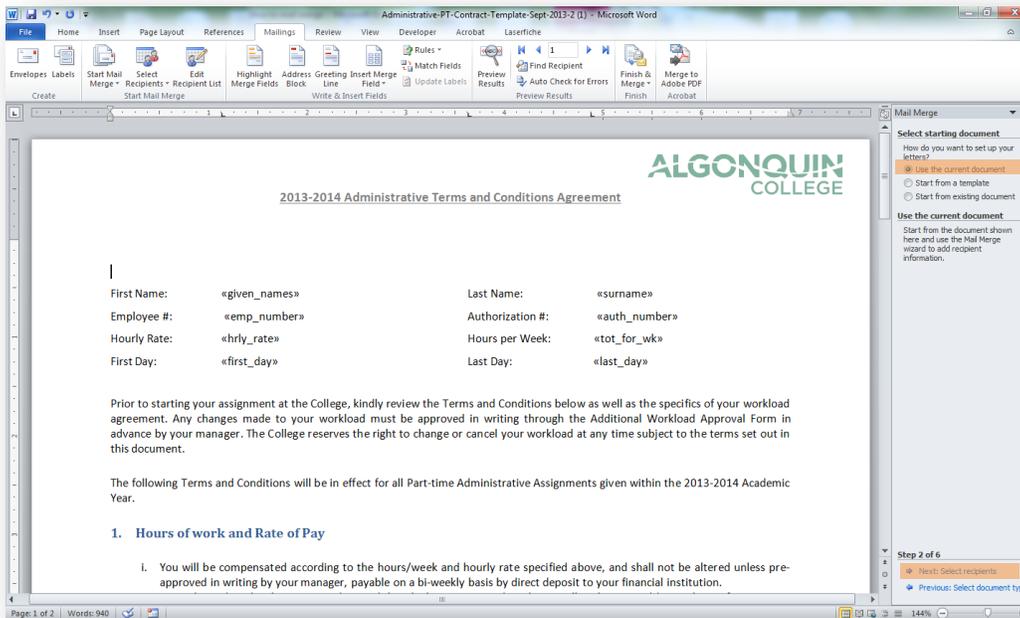
4. Click on “Start Mail Merge” then click on “Step-by-Step Wizard”.



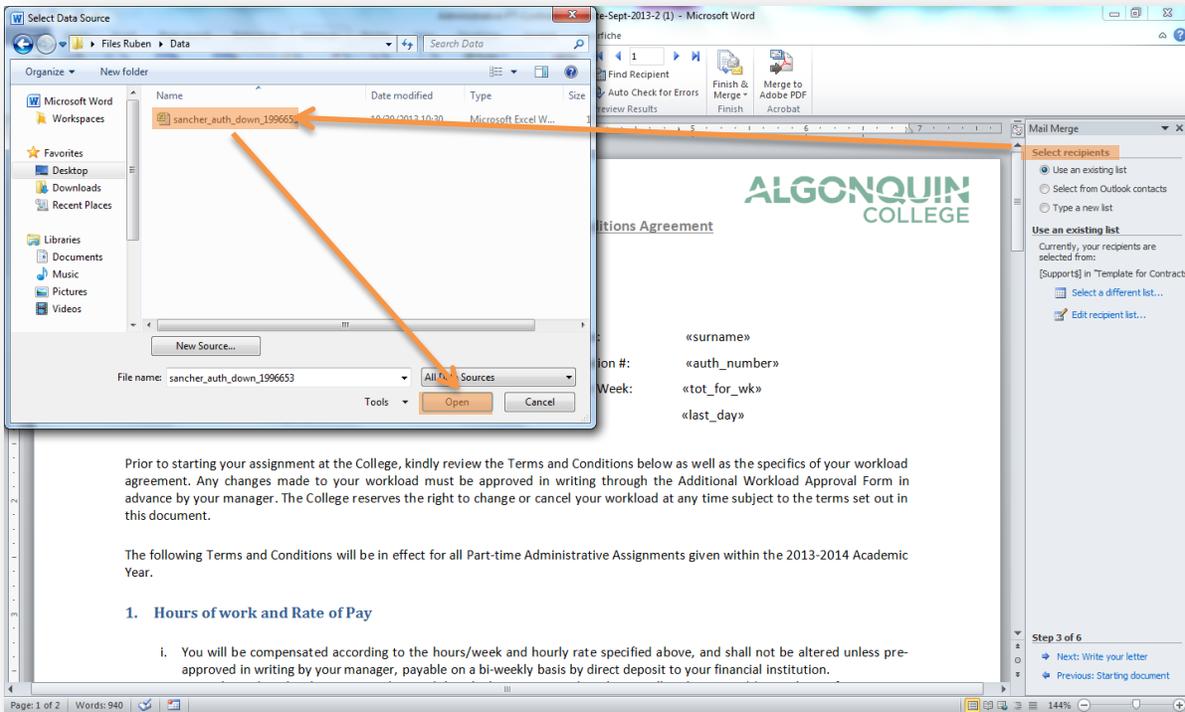
- On the right hand side, select “Letters” if not already selected. Then click “Next: Starting Document” at the bottom of the Mail Merge column (Step 1 of 6)



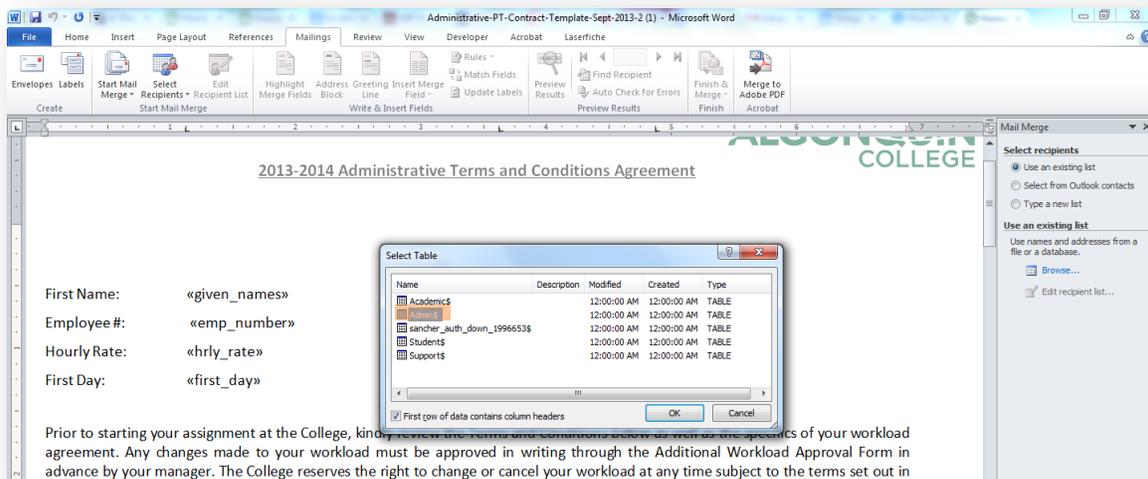
- Then select “Use the current document” then select “Next: Select Recipients” to select the contacts (Step 2 of 6).



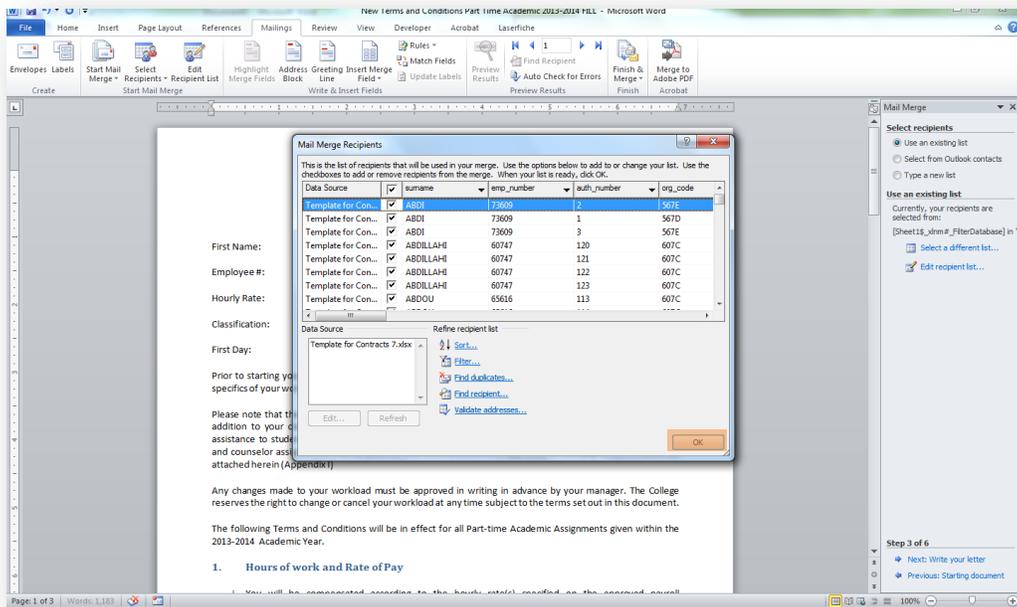
7. Select “Use an existing list” then click “Browse” to find your list of part-time employee data. The list is saved as an xls or xlsx document, under whatever file name you gave your data from HRIS. Find your workbook, then click “Open”.



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.



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



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

