

Finance Manager: Human Resources



Calendar Events and Maintenance

The nVision Human Resources Calendar table serves many purposes throughout the Human Resources and Payroll systems. The calendar links to the Bargaining Unit table as a default for attendance, as well as the Payroll - Pay Profile table for proration calculations. It is important that the calendars are setup properly and maintained throughout the year as needed.

Calendar Event Setup

Before setting up calendars in nVision, the Calendar Events table needs to be defined to provide the user the ability to customize the events by choosing the colors represented by each event on the calendar (i.e., Conference, Emergency, etc.) and indicating whether the event is considered a paid working day. Set the appropriate calendar styles **before** creating calendars through the **Calendar Maintenance** routine.

Access to Calendar Events Setup

1. Open the Setup menu tree.
2. Open the Calendar menu tree.
3. Click the Calendar Events option.

The Calendar Events listing displays all event codes. Use this window to add, maintain, or view calendar event codes.

Calendar Events	
Search ▾	
Drag a column header here to group by that column.	
Event Name	Paid Working Day
Recess	<input type="checkbox"/>
Conference	<input type="checkbox"/>
No School	<input type="checkbox"/>
WeekEnd	<input type="checkbox"/>

Field**Description**

Name	Enter the name of the event, exactly as it will be displayed in the Legend of events in the Calendar Maintenance routine.
Color	<p>While in Add or Update mode, use the drop-down to choose the coordinating color for the event. The Color palette displays 21 colors to choose from. It is suggested to select a different color for each event. The Color field is shaded with the selected color.</p> <p>This is the color that will display for the event in the Legend and the color that displays on the calendar when linking this event to a selected date(s) through Calendar Maintenance.</p>
Paid Working Day	Check the box if the event counts towards the total number of Paid Work Days for employees in the bargaining units linked to the calendar.

Adding a Calendar Event Record

1. Enter Add (select New) mode.
2. Enter all information associated with the calendar event.
3. Save the record.

Updating a Calendar Event Record

1. Highlight the appropriate record and enter Update mode.
2. Change all necessary information as needed.
3. Save the record.

Deleting a Calendar Event Record

NOTE: A calendar event cannot be deleted if it is currently being used. If a calendar exists with a predefined calendar event code, that code cannot be deleted.

1. Highlight the appropriate record(s) and enter Delete mode.
2. Confirm that this is the correct record to delete. Press **Yes** to delete the record. Press **No** to not delete the record.

Calendar Maintenance

Calendar Maintenance Setup is used to create the various fiscal year calendars to be utilized. Within each fiscal year calendar grouping, monthly group calendars can be defined, such as 10-, 11-, or 12-month calendars. Each monthly group calendar can then be linked to their specified bargaining units as the default calendar.

Access to Calendar Maintenance Setup

1. Open the Setup menu tree.
2. Open the Calendar menu tree.
3. Click the Calendar Maintenance option.

Calendar Maintenance

Calendar Options

Add Calendar Group Delete Calendar Group Add Calendar Print Calendar 10 Mo. 12 - 13 Rename Calendar Copy Calendar 10 Mo. 12 - 13 Delete Calendar

Calendars

- Calendars 2003 - 2004
- Calendars 2004 - 2005
- Calendars 2005 - 2006
- Calendars 2006 - 2007
- Calendars 2007 - 2008
- Calendars 2008 - 2009
- Calendars 2009 - 2010
- Calendars 2010 - 2011
- Calendars 2011 - 2012
- Calendars 2012 - 2013**

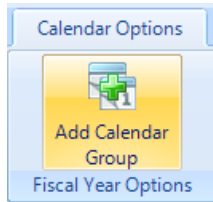
Calendars 2012 - 2013

July 2012							August 2012							September 2012							October 2012							November 2012													
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S							
1	2	3	4	5	6	7	1	2	3	4										1	1	2	3	4	5	6								1	2	3					
8	9	10	11	12	13	14	5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10							
15	16	17	18	19	20	21	12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17							
22	23	24	25	26	27	28	19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24							
29	30	31					26	27	28	29	30	31		23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30								
Jun 30	Jul 1						2							3							4							5							6						
		</																																							

Adding a Fiscal Year Calendar

Follow the steps below to add a fiscal year calendar.

1. Under the Calendar Options, click **Add Calendar Group**.

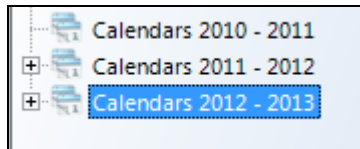


The system adds a fiscal calendar for the next sequential fiscal year.

Adding a Default Monthly Calendar Group within a Fiscal Year Calendar Group

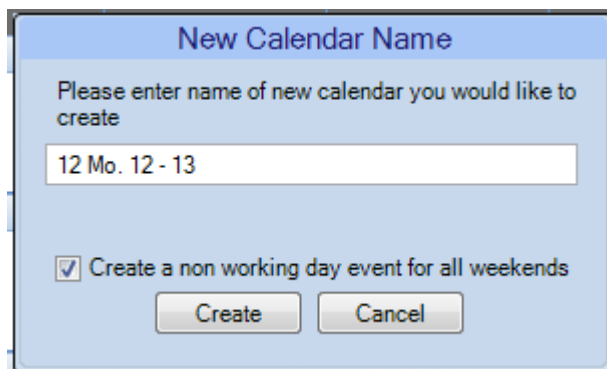
Each fiscal year calendar group may have multiple monthly group calendars associated with that year. Examples of monthly group calendars are: 10-month calendar, 10.5 month calendar, 11-month calendar, 11.5 month calendar, etc. Follow the steps below to add the various monthly calendar groups within each fiscal year.

1. Highlight the appropriate fiscal year calendar in the tree as shown in the illustration.

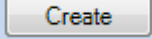


2. Click .

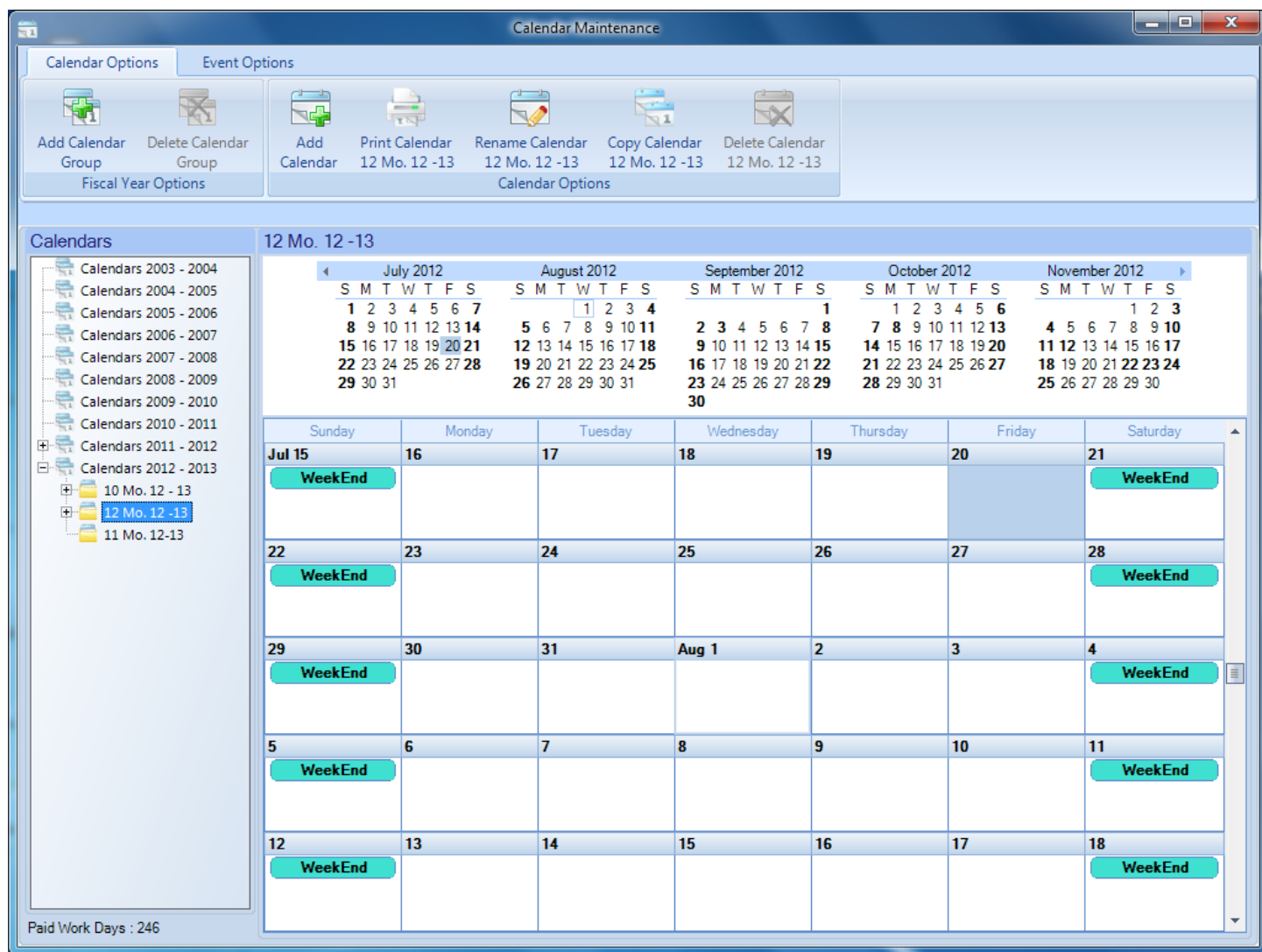
The New Calendar Name pop-up window displays.



Enter a descriptive name for the calendar being created. Be sure to include the number of months. Leave the box checked to create a non-working day event for all weekend days.

3. Click .

In the menu tree, click on the name of the calendar to view.



Calendar Maintenance

Calendar Options | Event Options

Add Calendar Group | Delete Calendar Group | Add Calendar | Print Calendar | Rename Calendar | Copy Calendar | Delete Calendar

12 Mo. 12 -13

Calendars

- Calendars 2003 - 2004
- Calendars 2004 - 2005
- Calendars 2005 - 2006
- Calendars 2006 - 2007
- Calendars 2007 - 2008
- Calendars 2008 - 2009
- Calendars 2009 - 2010
- Calendars 2010 - 2011
- Calendars 2011 - 2012
- Calendars 2012 - 2013
 - 10 Mo. 12 - 13
 - 12 Mo. 12 -13**
 - 11 Mo. 12-13

12 Mo. 12 -13

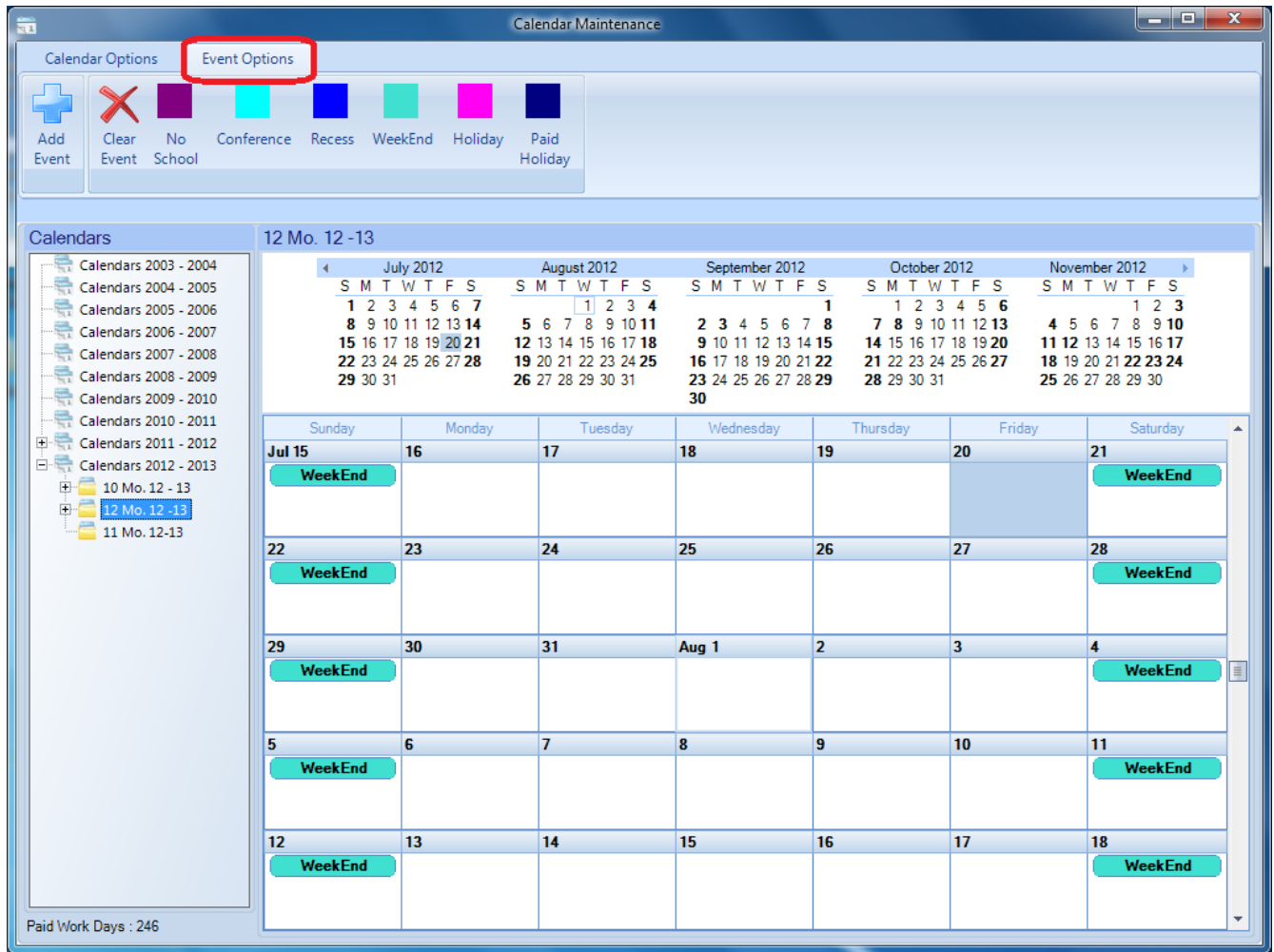
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S						
1	2	3	4	5	6	7	5	6	7	8	9	10	11	2	3	4	5	6	7	8	1	2	3	4	5	6	7	8	9	10	11	12	13	4	5	6	7	8	9	10
8	9	10	11	12	13	14	12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17						
15	16	17	18	19	20	21	19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24						
22	23	24	25	26	27	28	26	27	28	29	30	31	23	24	25	26	27	28	29	28	29	30	31								25	26	27	28	29	30				
29	30	31											30																											

Paid Work Days : 246

Adding Events to a Calendar

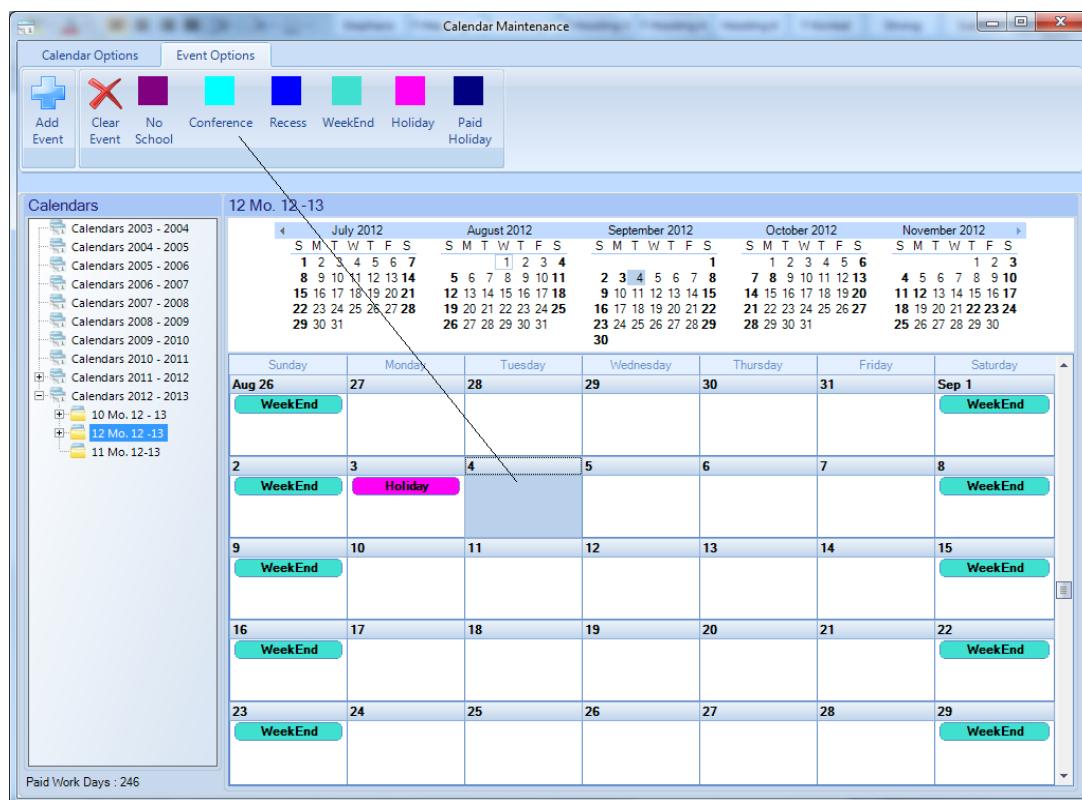
Each calendar may have specific events that are the same for each bargaining unit. Follow the steps below to add the events associated with the monthly group calendar.

1. Highlight the appropriate monthly group calendar name in the menu tree and click **Event Options** at the top of the window.

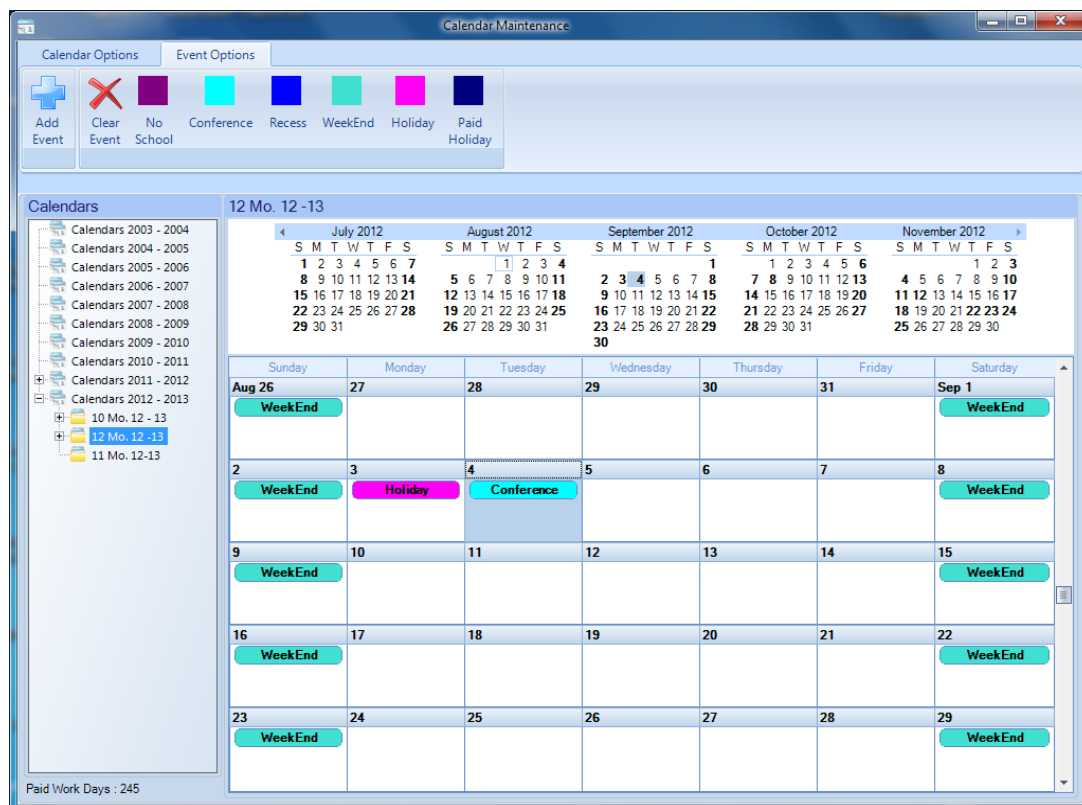


The top of the window displays the events that have been predefined in the Calendar Events Setup File.


2. In the calendar, highlight the day in the month on which the event is to take place. nVision allows the user to highlight more than one day at a time. For example, when recording the holidays for the year, hold down the Ctrl key and click July 4, December 25, January 1, etc., using the quick-view months and the right/left arrows in the top area of the calendar. To highlight consecutive days, hold down the Shift key and click on the starting and ending dates in the date range OR left-click with the mouse and drag over consecutive days in the five-month calendar view at the top of the screen or the five-week calendar view at the bottom of the screen.
NOTE: Highlight an entire month by clicking on one of the labels for the day of the week (S-M-T-W-T-F-S) in the appropriate month.
3. In the Legend box, click on the event name/color (i.e., Conference, Holiday, etc.) that corresponds to the day(s) highlighted.



The days selected in the calendar are now highlighted in the color associated with the event named in the Legend.

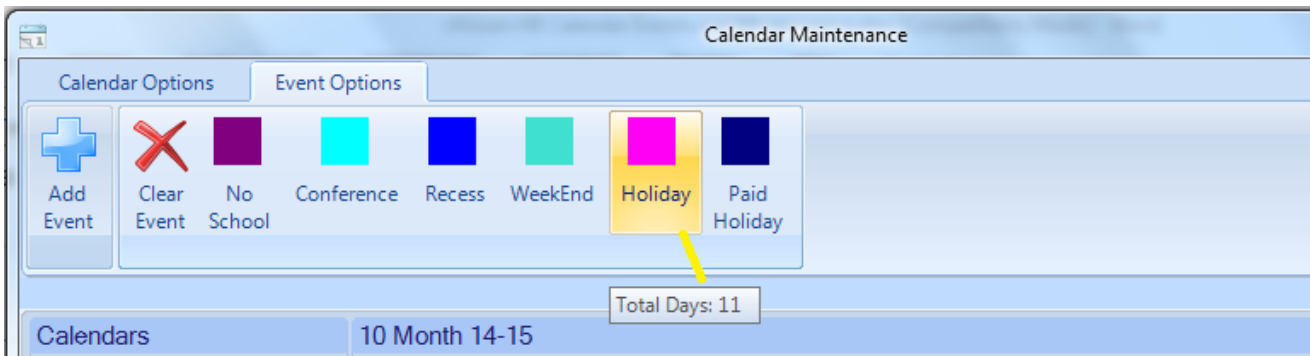




If a new event needs to be added to the legend at the top of the screen, click . This allows the user to add a new event without having to exit this routine.

- Repeat steps 2 and 3 until all events are added. If more than one event needs to be recorded on a given day, that entry is allowed. The day will show the multiple events that exist for that day.

Hover your mouse over the name of the Event to display a tooltip that shows the total number of days that this event occurs in the calendar. In the example that follows, with the mouse hovered over the "Holiday" calendar event, the tooltip quickly displays how many Holiday events are flagged in the selected calendar.

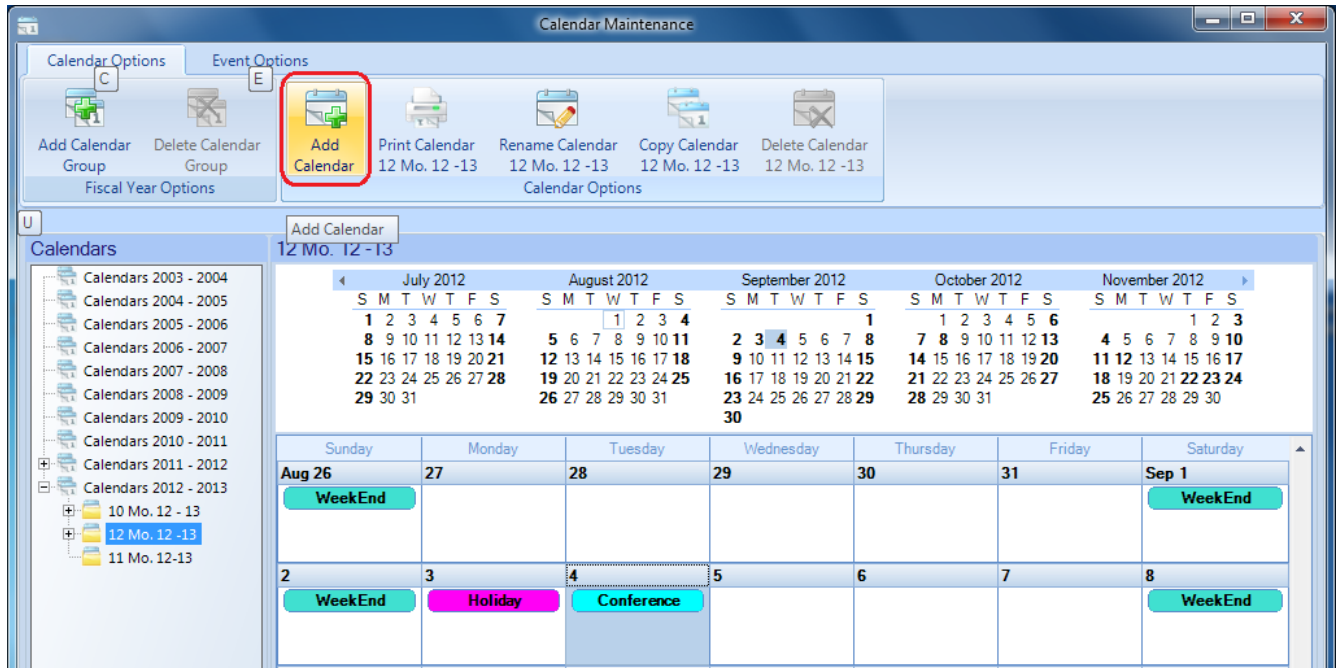


NOTE: To remove an event from a day(s), highlight the name of the event in the appropriate day(s) and click .

Linking a Bargaining Unit to a Calendar

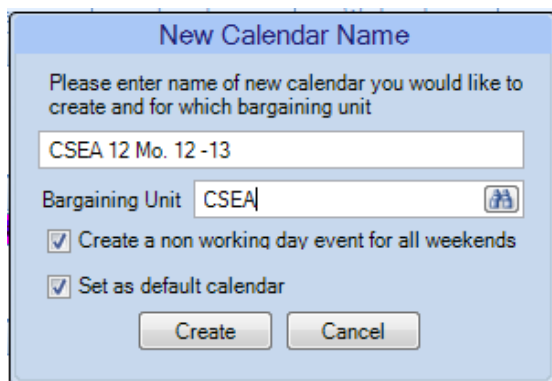
Once the various monthly group calendars (i.e., 10-month, 12-month) have been defined, link a bargaining unit to a specific calendar. Once the bargaining unit is linked to a calendar, use the existing pre-defined calendar events or add/change events that are specific to the bargaining unit. Follow the steps below to link the bargaining units to the calendars.


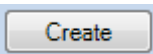
1. Click the **Calendar Options** folder at the top of the window and highlight the appropriate monthly group calendar name in the menu tree.



2. Click .

The New Calendar Name pop-up window displays.



3. Enter a descriptive name for the calendar being created. Enter a description of the employees within the bargaining unit. Be sure to include the number of months.
4. Use the lookup  to select the appropriate bargaining unit.
5. Leave the box checked to create a non-working day event for all weekend days or uncheck if the weekend days should be available for attendance EVENT entry.
6. To indicate this calendar as the default calendar for specified bargaining unit, check box "Set as default calendar".
7. Click .

Calendar Maintenance

Calendar Options | Event Options

Add Event | Clear Event | No School | Conference | Recess | WeekEnd | Holiday | Paid Holiday

Calendars

- Calendars 2003 - 2004
- Calendars 2004 - 2005
- Calendars 2005 - 2006
- Calendars 2006 - 2007
- Calendars 2007 - 2008
- Calendars 2008 - 2009
- Calendars 2009 - 2010
- Calendars 2010 - 2011
- Calendars 2011 - 2012
- Calendars 2012 - 2013
 - 10 Mo. 12 - 13
 - 12 Mo. 12 - 13
 - ADMIN 12 Mo. 12
 - CSEA 12 Mo. 12 - 1**
 - SNAP 12 Mo. 12
 - 11 Mo. 12-13

CSEA 12 Mo. 12 - 13 for bargaining unit CSEA

July 2012 | August 2012 | September 2012 | October 2012 | November 2012

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
1	2	3	4	5	6	7	1	2	3	4										1	1	2	3	4	5	6							1	2	3
8	9	10	11	12	13	14	5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10	
15	16	17	18	19	20	21	12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17	
22	23	24	25	26	27	28	19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24	
29	30	31	26	27	28	29	30	31	23	24	25	26	27	28	29	30	28	29	30	31	25	26	27	28	29	30									

Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday

Aug 26 | 27 | 28 | 29 | 30 | 31 | Sep 1

WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd

2 | 3 | 4 | 5 | 6 | 7 | 8

WeekEnd | Holiday | Conference | WeekEnd | WeekEnd | WeekEnd | WeekEnd

9 | 10 | 11 | 12 | 13 | 14 | 15

WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd

16 | 17 | 18 | 19 | 20 | 21 | 22

WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd

23 | 24 | 25 | 26 | 27 | 28 | 29

WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd | WeekEnd

Paid Work Days : 245

The new calendar will default with the calendar events defined in the monthly calendar group. To update the calendar, highlight the newly created calendar and add/update calendar events as needed. (Refer to the instructions in **Adding Events to a Calendar.**)

Updating a Monthly Group or Bargaining Unit Calendar within a Selected Fiscal Year

The calendars created are available for update throughout the fiscal year at any time. When choosing to update a **monthly group** calendar, the changes extend to all bargaining unit calendars associated with that group calendar. When choosing to update a **bargaining unit** calendar, the changes are applied only to that calendar; the monthly group calendar is unaffected.

1. Under the Calendars menu tree, highlight the monthly group or bargaining unit calendar within the appropriate fiscal year. The calendar is displayed on the right side of the window.
2. Add or remove calendar events as necessary.

To remove all events from a single calendar date, click the Event Options tab at the top of the window, highlight



the day, and click

To remove one event from a calendar date that has multiple events linked to it, click the Event Options tab at the



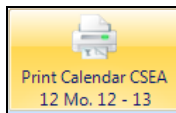
top of the window, highlight the event word (i.e., Holiday, etc.) in the appropriate calendar day, and click

To add events to a date, click the Event Options tab at the top of the window, highlight the appropriate day in the calendar detail or the quick-view calendar. In the Legend box, click on the event name/color (i.e., Conference, Holiday, etc.) that corresponds to the day(s) that was highlighted.

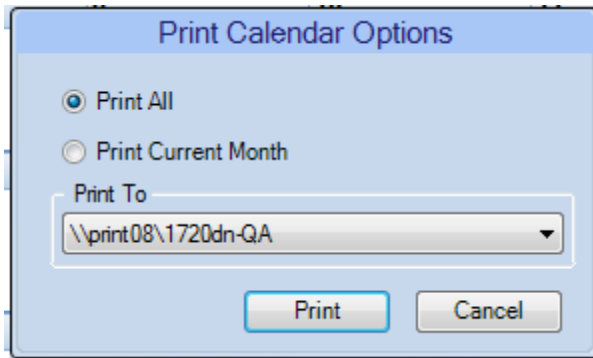
Printing the Monthly Group or Bargaining Unit Calendar

The Calendar Maintenance routine provides the ability to print one, multiple, or all months in a selected monthly group or bargaining unit calendar for a selected fiscal year. The printout is a calendar page with each event on the appropriate day of the month.

1. Under the Calendars menu tree, highlight the monthly group or bargaining unit calendar within the appropriate fiscal year. The calendar is displayed on the right side of the window.



2. Under the Calendar Options tab, click. The Print Calendar Options window displays.



Use this window to select the month(s) to be printed.

Choose **Print All** to print the entire Monthly Group or Bargaining Unit calendar for the selected fiscal year.

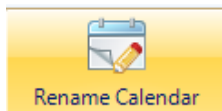
Be sure the cursor is highlighting a day in the month to print the calendar for, and choose **Print Current Month** to print the calendar for that month only.

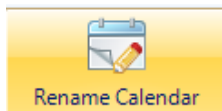
3. Select the default printer or choose another printer from the drop-down.
4. Click **Print**.

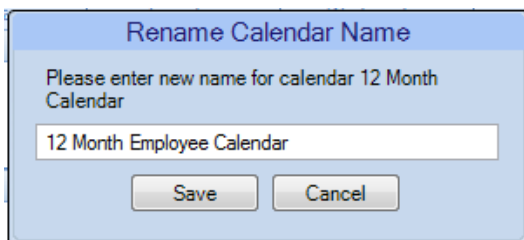
Renaming a Monthly Group or Bargaining Unit Calendar for a Selected Fiscal Year

An option is available to rename an existing monthly group or bargaining unit calendar at any time.

1. Under the Calendars menu tree, highlight the monthly group or bargaining unit calendar within the appropriate fiscal year. The calendar is displayed on the right side of the window.



2. Under the Calendar Options tab, click . The Rename Calendar Name window displays.



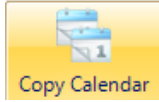
3. Enter the new name for the calendar.
4. Click **Save**.

Copying a Monthly Group Calendar to a Selected Fiscal Year

An option is available to copy an existing **monthly group** calendar from one fiscal year to another.

1. Under the Calendars menu tree, find the appropriate fiscal year and highlight the monthly group calendar to be copied. The calendar is displayed on the right side of the window.



2. Under the Calendar Options tab, click . The Copy Calendar Options window displays.


A dialog box titled "Copy Calendar Options" with a blue header. It contains three input fields: "New Calendar Name" with the text "12 Month Employee Calendar", "Copy To" with a dropdown menu showing "Calendars 2012 - 2013", and "Copy Events" with a dropdown menu showing "Weekend, Holiday". At the bottom are "Copy" and "Cancel" buttons.

3. Enter the **new name** for the calendar.
4. Using the drop-down arrow, select the **fiscal year** to copy to.
5. Use the drop-down arrow to indicate which events from the original calendar are to be copied.
6. Click **Copy**.

Deleting a Bargaining Unit Calendar for a Selected Fiscal Year

1. Under the Calendars menu tree, find the appropriate fiscal year and highlight the **bargaining unit** calendar to be deleted. The calendar is displayed on the right side of the window.



2. Under the Calendar Options tab, click . Click **Yes** to confirm that this is the correct calendar to be deleted

Linking the Calendar to the Pay Profile

In nVision Payroll, go to Pay Profile Setup (Setup – Pay Profiles) and highlight the appropriate pay profile record to which the calendar is to be linked. Enter **Update** mode and click the drop-down arrow on the **Bargaining Unit Calendar** field.

Pay Profile

Name: MECH Payroll Cycle: Biweekly ☒ Generate Contract

Description: MECHANICS Months Per Year: 12.00 ☒ Generate Supplemental

Standard Hours: 7.00 Standard Days: 260.00 ☐ Prorate Period Pay

Bargaining Unit: CSEA Bargaining Unit Calendar: CSEA 12 Mo. 12 - 13

Number of Checks: 26.00 Number of Payroll Events: CSEA - 10 Mo. 11-12
CSEA - 12 Mo. 11-12
CSEA 10 Mo. 12 - 13
CSEA 12 Mo. 12 - 13

Pay Profile Details

Payroll Events Payroll Check Options Salary Schedules

Fiscal Year: 07/01/2012 - 06/30/2013

Event No.	Payroll Date	Payroll Event Type	Pennies	Split Percentage	Flat Amount	Multi Occurrences	Start Date	End Date
1	Fri 07/06/2012	Normal	<input type="checkbox"/>					
2	Fri 07/20/2012	Normal	<input type="checkbox"/>					
3	Fri 08/03/2012	Normal	<input type="checkbox"/>					
4	Fri 08/17/2012	Normal	<input type="checkbox"/>					
5	Fri 08/31/2012	Normal	<input type="checkbox"/>					
6	Fri 09/14/2012	Normal	<input type="checkbox"/>					
7	Fri 09/28/2012	Normal	<input type="checkbox"/>					

Import Payroll Events

The drop-down displays those calendars linked to the bargaining unit associated with the selected pay profile. Highlight the appropriate bargaining unit calendar name and **Save** the record. This needs to be done each fiscal year.

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