

SYNCHRONIZE EMPLOYEE INFORMATION

General Ledger > Configuration > General Ledger Default Settings > Cross-Year Update Tab

For the employee demographic items listed below, you can choose how you want to synchronize data between the current year, prior year, and next fiscal year databases.

TO SELECT THE LEVEL OF SYNCHRONIZATION

Use these fields to specify how you want the system to synchronize the listed types of employee demographic data between fiscal year databases. Any changes made in the current years will be duplicated and synchronized in the prior or next fiscal year as specified.

For each of the items listed in the window you can choose whether you want:

- **None:** No synchronization between fiscal years. This is the default.
- **Next Year:** Synchronize only between the current fiscal year and the next fiscal year.
- **Prior/Next Year:** Synchronize both ways, prior fiscal and next fiscal years.

As an example of Prior/Next Year synchronization, assume that in the 2008-2009 fiscal year an employee changes their emergency contact from Jake Smith to Brad Smith. In the 2007-2008 fiscal year and the 2009-2010 fiscal year, if a record exists for this employee in emergency contacts with the name of Jake Smith, then the name in that record will also be changed to Brad Smith. If a contact is added, the contact would also be added in the other fiscal years.

Deletes will not be cascaded to the other fiscal years, since they may still contain relevant data. In the event of a field that has been added to a table

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but does not exist in the table in a previous year, the program will check to see if the field exists, and if it does not, will exclude that field from the data synchronization.

For the impacted data items, their windows will have a field called Cross-Year Update that shows the current setting for the data item in GL Default Settings. The field will be display-only. The following data items are included:

- Employee Emergency Contacts--For an employee's emergency contacts, data will sync on the employee ID and the contact name. If the name is being changed, then it will sync on the old name. For example, Brad Smith is changed to Jake Smith. Any record in the other fiscal years with the same employee ID and a name of Brad Smith is changed to Jake Smith.
- Employee Documents (If you add document, it will also be added in the prior/next year. Syncing will not occur for an edit of a document.)
- Employee Certificate (will sync based on the employee ID and the certificate number)
- Employee Education (will sync based on employee ID, degree, school, major, and minor)
- Employee Languages (will sync based on employee ID and language)
- Master Certificates (will sync based on type, description, and certificate type)
- Master Degrees (will sync on degree and state code)

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- Master Endorsements (will sync on type and description)
- Master Languages
- Master Schools
- Master Minors
- Master Majors
- Employee Miscellaneous Tracking (will sync on employee ID, miscellaneous tracking description)
- Miscellaneous Tracking Setup
- Master Ethnicity
- Department Maintenance
- Education Credit Types
- Supervisors (will sync on employee ID (supervisor) and user ID)
- HR Document Types
- Status Codes
- Job Titles
- Leave Bank Plans
- Termination Codes
- Employee Groups

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- Employee Categories (will sync on classification)
- DAC Email Address
- User defined PAR Types
- PAR Workflow
- Compensation statement
- Life Event Reasons

SELECTIVE SYNCHRONIZATION IN EMPLOYEE MAINTENANCE

After you make a change to the employee record, the system displays the Changes window so you can record the reason for the change. The window also includes a **Copy to Prior** and **Copy to Next** field so that you can choose whether you want the change in the prior year and next fiscal year as well. The check boxes only display if there is a prior year database and a next year database.

EMPLOYEE PROFILE CHANGES (PORTAL)

When PR Rollover is run, the Employee Profile changes (from iVisions) change to the new fiscal year. Employee profile change records are rolled forward if they haven't been posted. When profile changes are posted, the user will be asked if they want to apply the changes to the prior fiscal year or next fiscal year (if those connection group types apply).