

HOW TO REVIEW AND DELETE POPS TRANSACTIONS IN BANNER HRIS

Pops Collector Table Review Form (PYAPOPS)

General:

PYAPOPS is a Banner form developed by McGill that allows users to browse their transmitted casual payroll data. In addition to restricting the view to their own payment data, this form has powerful query capabilities allowing the user to limit the display to payments that match the query criterion; for example, to view all records belonging to an individual and/or by FOAPAL.

The POPS user/approver must be authorised to review and/or approve the POPS requisitions. They will have access only to the org and/or transactions that they have initiated or have jurisdiction over.

There are 3 types of users who can use the POPS review table (PYAPOPS):

- **N** - Normal User: The user can transmit from POPS and view the entries for the Orgs that they have been authorised to view.
- **R** - Restricted User: The user can transmit from POPS and view only those entries that he/she has transmitted.
- **S** -Super User: The user can transmit from POPS for their own org but can view all entries on the POPS table review form. There are only a limited number of people that fit in this group and they are generally from the Payroll, HR, and Finance department.

Accessing the " POPS Collector Table Review Form" (PYAPOPS)

Type the name of the form **PYAPOPS** in the **Go** field.
(OR)

Use the Menu Selection:

- 1) Access **Products Menu**
- 2) Select **Human Resources System Menu**
- 3) Select **POPS – Payroll Onetime Payment System**
- 4) Select **McGill University POPS Review Form**

The screenshot shows the Banner2000 - Banner application window. The title bar reads "Banner2000 - Banner". The menu bar includes "File", "Edit", "Block", "Field", "Record", "Query", "Help", and "Window". The toolbar contains various icons for navigation and actions. The main window title is "McGill PRODUCTION d/b GUAGMNU 4.2 (Banner)". Below the title bar, there is a "Products Menu" dropdown menu and a "Direct Access:" field containing "PYAPOPS". The main area is divided into two panes. The left pane shows a tree view of the menu structure, with "POPS - Payroll Onetime Payment System" selected. The right pane shows a table with the following data:

Type	Description	Name
	McGill University - POPS Onetimes Review	PYAPOPS
	McGill University - Casual Policy Monitoring - Peaks We	PYICPM1

At the bottom of the window, there is a status bar with the message "FRM-40212: Invalid value for field LEVEL_LIST. Record: 1/1".

The adjacent screen will appear:

The form is split up into three sections. **Section 1** contains most of the POPS payment record. **Section 2** contains most of the POPS requisition user profile information and **Section 3** (shown on next page) contains the tracking history of the POPS record after it has been transmitted.

To delete a payment, you must be in the first block.

Section 1

1. Status McGill Id 150119683 BALIOL/Marie Louise/Ms SIN 261-673-156

Chart	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	Req Org
1	225634	00049	600024	6704	000000	000000		00049

Pay date 01-FEB-2001 Pay Freq BW Req No 56 Payment Ref No 217

From 08-JAN-2001 To 12-JAN-2001 SIFU A Payment type SG

Hours 12.00 Rate 12.75 Gross 153.00 Vac% 4

Position Suffix Ovt Reason Ovt Factor 1 CPM

Repl ID Mat/Sick Lve Fund Req Credits Single Payment

EI Factor EI Deemed Hrs Gov Prg Gov Prg ID

Form ID AC Job title Technician Union cde

Comment

Section 2

Form Srce P Transmit Date 30-JAN-2001 Repl.ReqInd

Created by 150025874 unknown
leonard.kopland@mcgill.ca 398-3939

Transmitted by 150040972 Kerklaan/Leo C H

Deleted by 05-FEB-2001 Version 5.0

Record: 1/3

Banner2000 - Banner
 File Edit Block Field Record Query Help Window

McGill University- POPS Collector Table Review form PYAPOPS 1.0 (Banner)

Status McGill Id BALIOL/Marie Louise/Ms SIN

Chart	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	Req Org
1	225634	00049	600024	6704	000000	000000		00049

Pay date Pay Freq Req No Payment Ref No

From To SIFU Payment type

Hours Rate Gross Vac%

Position Suffix Ovt Reason Ovt Factor CPM

Repl ID Mat/Sick Lve Fund Req Credits Single Payment

EI Factor EI Deemed Hrs Gov Prg Gov Prg ID

Form ID Job title Union cde

Comment

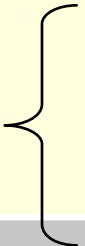
Copied to Banner
 Checked Banner ID
 PHAMTIM Shift
 Earn Code
 Central Admin
 Ben Date

Job Checked in Banner
 Budget/Special Funds
 Pay Event
 Finance Mgr ID
 WS Date

Payment Confirmed
 No of records
 CPM Week
 Finance Approval
 Legacy Acct?
 Empl PIDM

Record: 1/3

Section 3



Querying a Payment

You can locate one or more payments to review either by scrolling through your records using the up and down arrows on your keyboard, or by performing a query, which is useful if you have a lot of records.

1. Press **F7** to clear the screen and put Banner in query mode.
2. Enter your query criteria. Any combination of fields can be used to query and will help to reduce the search results.

Query Criteria: You can execute a query on almost any field on PYAPOPS. The most likely query criteria are:

- McGill ID
- Name (in the block next to McGill ID - not case sensitive. Enter the whole family name or a portion of it, followed by the wildcard % (e.g. Wilmo%))
- FOAPAL (or individual FOAPAL elements)
- Pay Date (see details below)
- Req No
- CPM (Casual Policy Monitoring code)
- Gov Prg or Gov Prg ID (Work Study or SEED #s)
- Status

Queries by Pay Date: You can query POPS transmissions by specific date, and ALL past and future pay dates.

Enter the following in **Pay Date** (or double-click on the **Date** field to bring up a calendar):

- The actual pay date e.g. 18-JAN-2001
- ALL previous payments up to and including a certain date e.g. <=18-JAN-2001
- ALL previous payments prior to a certain date e.g. < 18-JAN-2001
- ALL future payments including a certain date e.g. >=18-JAN-2001

3. Press **F8** to execute your query.

The transactions that match the criteria you entered (if any) will appear in physical transmission order (combination of the **Req No** and **Payment Ref No**). Use the up or down arrow keys on your keyboard or the arrows that are in the middle of the PYAPOPS screen to see your results.

Note: The query will return payment records depending on your authorized user security.

4. If you wish to delete a transaction, change the **Status** indicator to **D**, and click the **Save** icon. See the [Field Descriptions](#) for definitions of all **Status** values.

Important Fields on PYAPOPS

Status

A	Active. Ready to be copied to Banner payroll when due for payment. This is how it would normally arrive from POPS (see W below for the other status when it comes from POPS).
N	Automatically used for all Academic Casual – Non resident payments. Once approved by Payroll, the status will change to A .
D	Deleted record. Not to be processed further. Status cannot be re-activated.
H	On Hold. Do not continue processing for now. The Payroll staff may assign this when a given payment is under question.
T	Transmitted to Banner's PHRMTIM table for payment. (Not to be confused with transmission from POPS to Banner). This is a temporary state and will be modified to one of the following after payroll processing is completed.
E	Error. Banner Payroll was unable to process the given payment record for whatever reason.
P	In process. Identifies payment for which additional documents are required, in order for payment to be processed. These records may previously have had a status of H, but changed to P to indicate additional requirements for processing. Once the documents are received and processed, the status will be changed from P to A.
U	Unknown status. This status is assigned when the payment does not show up in Banner but has not been treated as an Error. Hopefully this will never arise.
W	Waiting Approval. Transmitted from POPS for a Special Funds charged FOAPAL. Staff in Special Funds will change status to A, D, or H

Pay Frequency

SM - semi-monthly (for payments made on Miscellaneous and Overtime Requisitions)

BW - bi-weekly (for payments made on Academic and Non-Academic Casual requisitions to students and casual non-trades employees)

Pay Ref No

All payment records have both a requisition no and a reference no. A sequential number is assigned to a requisition but the requisition may have multiple payment records within. Each payment record has a reference number that is sequentially assigned, regardless of requisition or requisition type. On the POPS requisition, it can be located in the middle of the screen beside Payment Type.

SIFU (SIFU Work Categories – Government Reporting)

SIFU Work categories & POPS

Group	Code	Description
Student (On POPS Academic requisition form)		
	A	Student related work (not scholarship & not Post Doc)
	R	Scholarship/Award/Prize
	W	Post Doc
Academic		
	B	Course related (non teaching)
	X	Course lecturer with course credits
	L	Course lecturer (course credits reported earlier/before)
	G	Guest lecturer (course credits not reported)
	F	Additional course load
	O	Other academic/research related
Non Academic support staff		
	S	Supervisors
	M	Management & Librarians
	T	Technical
	C	Clerical
Trades & Services		
	U	Trades & Services