EXCELLENCE IN ACTION
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‘MYBALANCE’ - STREAMLINING REPORTS SAVES TIME AND EFFORT

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PAYROLL COORDINATOR

THE CHALLENGE
Virginia Cheung, Payroll Coordinator for Facilities Services, is principally responsible for reviewing invoices and overseeing staff payroll. As the department’s HR resource person, Virginia is also the central point of contact for questions on paychecks, vacation time, and sick days.

“One of my responsibilities is to oversee the timesheet intake process and allocate information such as vacation time, sick days, and banked overtime into our system. The Trades will ask me, for instance, how much vacation time they have saved up and I would then produce a report that lists all the pertinent information. However, in order to produce that report, I had to sift through data across several reports and manually piece together the information. As you can imagine, this was really time-consuming and I wanted to find a better way to do this.”

THE OBJECTIVE
To simplify the process of retrieving information by automatically streamlining content into one easy-to-access all-encompassing report.

THE APPROACH

“The first step was to see if what I wanted to do was actually possible. I spoke with our Business Systems Analyst Sam Cribb and asked him if we could automatically pull information into one report with as few clicks as possible.” According to Sam, the way the system was setup, staff were only look at one report at a time. “It was a lot of clicking, running a report, looking at it, closing it, running a different report and so on. What I did was to create a new report that only requires one click to run. This report automatically gathers and shows all the important information Virginia needs and displays it in one easy to read format.”

THE RESULT
With the amalgamated report now up and running, Virginia saves an estimated 60 minutes a month by avoiding lengthy searches from several sources. The report, referred to internally as MyBalance, instantly provides pertinent information on vacation time, sick time, and banked overtime in a single report. “As a result of producing this new report, I am able to look up all the information that I need to code the timesheets instantly, instead of opening up and reopening different reports. As for the trades who comes to ask me about their vacation, banked OT or sick balances, I can now provide them that information right away!”

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