



PSHR WMU Electronic Workflow

Training Sessions
October 2009



Introduction:

The PeopleSoft Workflow Solution:

- Automates the request and approval process for personnel appointments and transactions.
- Allows for online tracking.
- Virtually eliminates inefficient paper use and tracking.



Phase I:

WMU – Incidental Pay Form

- WMU Incidental Pay Forms are used for payments not related to hours worked.

WMU – Temporary Appointment Form

- Payment for hours worked must be processed using an online Temporary Appointment form.



Electronic Workflow Process:

- 1) Request User Access.
- 2) Initiator completes and submits **WMU Electronic Workflow Form.**
- 3) Form is automatically routed to pre-determined Approver(s).
- 4) Approver(s) will review and approve, deny, or recycle the **WMU Electronic Workflow Form.**
- 5) Form authorized for entry and/or payment.



Roles & Responsibilities:

Initiator = The person who initiates the **WMU Electronic Workflow Form**.

- Gather data needed to process form
- Complete and submit form
- Re-work form (if necessary)
- Track form
- Cancel form (if necessary)

See Page 5, 8, and 12 of User Guide



Roles & Responsibilities:

Approver = Responsible for reviewing and approving, denying, or recycling the **WMU Electronic Workflow Form**.

- Primary and Alternate
- Review form within 48 hours of submission
- Conduct off-line conversation if necessary
- Take Action

See Page 16 of User Guide



E-mail Notifications:

- Authorized
- Canceled
- Denied
- Recycled
- Time out



What's New?!

- Single Sign-on!
- Drop down box to select Appointment Form type.
- No I-9 Date.
- Grant appointment dates checked against grant table.
- WIN box appears on form.
- S01 / S03 / H03 options gone.
- Some fields have moved on the TA form.



Live Demonstration:



Tracking WMU Electronic Workflow Forms:

- 1) Log into PeopleSoft via GoWMU**
- 2) Search for Form**
- 3) Review Status** - the process log will indicate the status of the form and who the form was last routed to. If the form has been authorized the log will show who authorized the form and when.

See Page 24 of User Guide



Re-working a Recycled Form:

- Access form from Worklist.
- Must click 'Update Appointment Information' box to change data.
- Correction of a G/L Combo Code requires a new TA.
- A comment box will appear for new comments.
- Clicking 'Save' re-routes form to approvers.



Other Good Things to Know:

- Clicking 'View All' in Comments section allows you to see all the comments at once.
- Forms remain available for review indefinitely.
- Revised User's Guide is accessible in the form by clicking on the *Guide* link at the top.
- More information on the HR Web site under the Electronic Workflow link.
- Worklist (In Box) vs. Workflow (Someone else's Box)



Frequently Asked Questions:

- Where can I find the approval path for my department?
 - PSHR Reports.
- How do I change the approval routing path?
 - Complete a 'PSHR Electronic Workflow Approval Rule Change Request' form
- When do I need to complete a KRONOS correction form?
 - If you submit an hourly appointment form with an end date that falls within a pay period that has already been processed.



Frequently Asked Questions:

- Why does a form have to be canceled if the wrong G/L Combo Code has been entered?
 - The approval path (routing) is determined by the G/L combo code.
- Where can I find copies of the Workflow Newsletters?
 - On the HR Web site ~ click on the *Electronic Workflow* link.
- I have a new initiator/approver ~ how do they get access?
 - Complete a 'PSHR Electronic Workflow Web Access Authorization' form



Questions?



PSHR WMU Electronic Workflow

Hourly Student Appointment Forms

October 2009



Phase II:

WMU – Hourly Student Appointment Form

- WMU Hourly Student Appointment Forms will be used for WMU students who are working in university student jobs.
- Students who are non-enrolled for the summer sessions can be appointed during the summer using the WMU Hourly Student Appointment Form.

See Page 12 of User Guide



Hourly Student Appointment Form Highlights

- Single sign-on via Go WMU!
- WIN is required for form submission.
- No address required!
- SSN – PeopleSoft vs. Banner.
- Termination date field is available, but not required (except for Grant appointments).



Hourly Student Appointment Form Highlights con't

- Grant Dates verified against grant table.
- Default Pay Rates
- Duplicate Job Codes
- Work Study
- Form Initiation access is based on position#
- Approval Routing



Live Demonstration:



Career & Student Employment Services

- **Definition of a Student Employee**
- **Student Pay Rates**
 - Grade/Step Definitions
 - CSES Review
- **Pay Rate Limit Review**
- **Posting Jobs**



Frequently Asked Questions

- Do I have to submit a form to change FICA status?
 - No.
- My student is switching Work Study type for Spring. What do I have to submit?
 - Nothing.
- When do I need to do a KRONOS correction sheet?
 - If you submit an hourly appointment form with an end date that falls within a pay period that has already been processed.



Who To Contact:

- Student Employment Policies and Pay
 - Career and Student Employment Services
- Student Appointment Form Completion
 - HR Services
- KRONOS / FICA issues
 - Payroll
- GoWMU, System Logon and Password issues
 - OIT Help Desk



Questions?