

Casual or Double Fill Final Review [HR & PY Services Team]

Module: OM, P&F Application // Process: Final evaluation, editing, and/or withdrawal of an approved Casual or Double-Fill Form.

OM Form Used: Casual / Double Fill Form

The image shows two screenshots of the Portland, Oregon City website. The top screenshot displays the main navigation menu with the 'Employees' link highlighted in a red box. The bottom screenshot shows the 'Sign-In' page, where the 'PortlandOregon.gov User Name' field contains the text 'pftestom2' and the 'Password' field is also highlighted in a red box. The 'Sign-In' button is visible below the password field.

Documents Covering This Workflow

1. OM Double Fill
2. OM Approver
3. BHR Final Evaluation (this document)

The BHR Services Team completes the process by reviewing forms submitted by OM Initiators and Approved by OM Approvers.

Your SAP assigned role will determine what you see in the Portal as a folder icon for your role in this workflow.

01 BEGIN

Login to your PortlandOregon.gov account.

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02

Enter the SAP Portal by clicking on "SAP CityLink Portal" on the Employee Portal Web Page.

Employee Portal
For all City of Portland employees

Employee Services
Forms Library
Policies & Procedures
Training & Development
Benefits & Wellness
About The City
Contact Us

Subscribe to RSS

MOST POPULAR

- Employee Services
- SAP CityLink Portal
- Travel
- Online Pay Statements
- Travel Authorization Form

VIEW MORE

MOST RECENT

Employee Services

Access SAP portal for your time sheet, leave balances, and CityLearner; log onto your Outlook account from home; access your W-2

- ▶ **SAP CityLink Portal**
- ▶ Office 365 Portal
- ▶ Online Pay Statements

Forms Library

Links to internal forms from various bureaus

- ▶ Accounting Forms
- ▶ Attorney's Office Forms
- ▶ Auditor's Office Forms
- ▶ Budget Forms

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The CITY OF PORTLAND Oregon | SAP CityLink

PortlandOregon.gov Log off

Welcome: PFTESTPA5,

Employee Self-Service **BHR Services Team** Employee Programs

Overview Personal Information Time Compensation CityLearner Help

Overview

Employee Self-Service applications provide you with easy access to information and services for employees. This page gives you an overview of the entire offering.

Personal Information
Manage your contact information.
Quick Links
[My Personal Data](#)
[My Address Information](#)
[My Communication Information](#)
[Validate Social Security Information](#)

Time - Read Only
View your time sheet and leave balances.
Quick Links
[My Time Sheet](#)
[My Time Statement](#)
[Leave Balances](#)

Compensation
View your pay statement and change your tax withholdings. Create, view and/or change your banking details.
Quick Links
[My Pay Statement](#)
[My Tax Withholding \(W-4\)](#)
[My Banking Information](#)
[My Pay Statement Delivery Method](#)

CityLearner
Manage your training activities, view training history, and search the training catalog.

Help
View Help Documents and Frequently Asked Questions (FAQs).
Quick Links
[ESS Help](#)

03

Once logged into the SAP Portal, go to the **BHR Services Team** folder.

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“Work In Progress” are saved forms that have been sent to you as an approver to review. Simply click on the item you want to open.

The screenshot displays the HR Business Central Services interface. It features three main columns: 'Actions', 'Work In Progress', and 'Organization'. The 'Work In Progress' column is highlighted with a red box around the top item, which is 'Bureau of Technology Services - Create Position - Casual/Double Fill - Third Step'. Below it are 'Portland Water Bureau - Rehire an Employee - 00563714 - Burton J - Sixth Step' and 'Portland Water Bureau - Hire an Employee - Sixth Step'. The bottom item is 'Bureau of Technology Services - Temporary/Limited Dur Action - 00850402 - Archer S - Sixth Step'. The 'Organization' column shows a 'Favorites' section with instructions on how to add and manage favorites.

Each white box displayed here is called a “Swim Lane” and can be moved easily by dragging and dropping into the position you prefer.

04

This is your “Landing Page” for Processes & Forms.

From here you choose your actions, continue with saved work, or pick up items sent to you through workflow.

Items are stacked in order of the most recently worked on at the top to the oldest items at the bottom.

As a member of the HR & PY Services Team your role in this portion of the P&F workflow is to review OM form submissions and make any necessary edits/changes.

In this example, we will be reviewing an OM Casual form, but this process is the same for a Doublefill or other action.

Click on the top item in the “Work In Progress” column to open it.

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Create Position - Casual/Double Fill for Organizational unit: Bureau of Technology Services

Check Send Save Draft Back to Author Withdraw Form Utilities

* Personnel area: 1250 OMF-BTS
* Personnel su... 3000 Non Rep
Controlling Area: COP1 City of Portland

Employee Group/Employee Sub Group
* Employee gro... 4 Casual Other
* Employee sub... 02 FT Covered, Positive

Planned Compensation (BHR Use Only)
Do you want to Update Co... Yes No

Pay Scale Structure Data

Country Grouping: USA Reference Date: 04/05/2016
Pay scale type: 01 Currency: USD United States Dollar
Pay Scale Area: CP COPPEA Salary Range... 2,131.20 2,131.20
ESG for CAP: 3 Time unit: Bi-weekly
Pay Scale Group From/To: SCL01030 SCL01030
Pay Scale Level From/To: Y6 Y6

Cost Distribution
Master Cost Center: MFTS000009 Support Center

Cost Distribution

Add Row Delete Row

Controlling Area	Cost Center	Order	WBS Element	Name	Percentage
COP1	MFTS000009			Support Center	50.00
COP1	MFTS000008			Administration	50.00

05

As a member of BHR Services, you will either:

- a) Send;
- b) Withdraw; or
- c) Send Back to Author.

Additionally, you may add Record or Process notes to the forms you receive (and can review any attached documents).

Withdrawals are effectively “Cancellations” of the action being taken. So if there is a correction to be made, don’t withdraw. Instead, either make the corrections yourself or add Process Comments and send the form “Back to Author.”

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Pay Scale Area: CP COPPEA Salary Range... 2,131.20 2,131.20
ESG for CAP: 3 Time unit: Bi-weekly
Pay Scale Group From/To: SCL01030 SCL01030
Pay Scale Level From/To: Y6 Y6

Cost Distribution

Master Cost Center: MFTS000009 Support Center

Cost Distribution

Add Row Delete Row

Controlling Area	Cost Center	Order	WBS Element	Name	Percentage
COP1	MFTS000009			Support Center	50.00
COP1	MFTS000008			Administration	50.00

06

Review the form's data entries.

Note that most of the fields on the form are white meaning that you, unlike the OM Approver, have the ability to edit most of the fields on this form.

Edit any information in this section that requires changes.

Scroll down to review the rest of the form's information.

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Address

*Building: 106
House number/s...: 1120 SW 5TH AVE
City: PORTLAND
Region: OR
Postal code: 97204-1912
Country: US
Physical room n...: 405

Comments

Previous Comments: PFTESTOM2 04/05/2016 09:31:51 Previous record comments stay with the employee as noted in the field above. The approver can add comments here or in the Process.

Record Comments: BHR Central can add record comments here as in the previous steps of the workflow. E.G. "Position approved in the Spring Bump."

Process Comments: These comments only go with the form and do not attach to the employee's final record. They are for the purposes of workflow.

07

Input any **Record Comments** or **Process Comments**.

Record Comments:

Comments which stay with the HR record created in SAP as a result of this process.

Process Comments:

Comments which only stay with the forms of this process Workflow to create the position and have it approved. Comments here will not stay on the final SAP HR master data record.

Return to the top of the form (scroll up).

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Create Position - Casual/Double Fill: Organizational Unit Bureau of Technology Services

Check Send Save Draft Back to Author Withdraw Form Utilities

Changes to display fields are ignored - Display Help

Review Without Errors

Attachments (1)

Create Position - Casual/Double Fill

Position Type
Position Type: Casual

Validity Period
Effective Date: 04/05/2016 Effecti... 12/31/9999 Process Reference Num...

Basic Data
Position: 40025808
* Job: 30000341 GIS Technician I
Position Abbrevi... GIS Tc I
Position Name: GIS Technician I
Organizational U... 20000072 Bureau of Technology Serv
* Business Area: MF06 Tech Svcs
* Cost Center: MFTS000009 Support Center

Account Assignment
Company Code: COP1 City of Portland
* Personnel are... 1250 OMF-BTS
* Personnel sub... 3000 Non Rep
Controlling Area: COP1 City of Portland

Employee Group/Employee Sub Group

08

There are several buttons at the top of the form.

Cancel stops the process and eliminates any work that has been done.

Save Draft also does as you'd expect. It saves a draft of the form, preserving your work up to this point, and puts the form in your **Work In Progress** swim lane so you can easily retrieve it in the future.

Back to Author send the form back to the last person in the workflow who had the ability to edit the form.

Withdraw effectively cancels the form.

Form Utilities allows you to create a PDF of the form to email, save, or print.

Additionally, you can review any attached documents by opening the attachments pane and clicking on **General Attachments**.

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Check **Send** Save Draft Back to Author Withdraw Form Utilities

Changes to display fields are ignored - [Display Help](#)

Review Without Errors

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Create Position - Casual/Double Fill

Position Type

Position Type: Casual

Validity Period

Effective Date: 04/05/2016 Effect... 12/31/9999 Process Re

Basic Data

Position: 40025808

*Job: 30000341 GIS Technician I

Position Abbrevi... GIS Tc I

Position Name: GIS Technician I

Organizational U... 20000072 Bureau of Technology Serv

*Business Area: MF06 Tech Svcs

*Cost Center: MFTS000009 Support Center

Account Assignment

Company Code: COP1 City of Portland

*Personnel are... 1250 OMF-BTS

*Personnel sub... 3000 Non Rep

Controlling Area: COP1 City of Portland

Employee Group/Employee Sub Group

09

The other two buttons are **Check** and **Send**.

Run a **Check** on the form.

NOTE

If changes need to be made, it's very important to update the form in order, from top of the form to bottom. If data is changed in one field, many fields will be auto-populated based on the new information. If the form is not filled out in order, some data will not update correctly.

Once you receive a Green Check, you can **Send** the form.

Sending the form moves the data of the form into SAP and makes it HR Master Data.

Click **Send**.

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Check **Send** Save Draft Back to Author Withdraw Form Utilities

Attachments (1)

Create Position - Casual/Double Fill

Position Type
Position Type: Casual

Validity Period
Effective Date: 04/05/2016 Effec... 12/31/9999 Process Reference Number: 000000000163

Basic Data

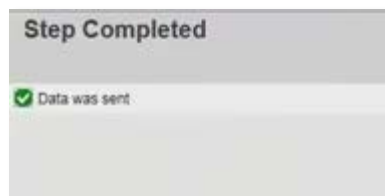
Position:	40025808
* Job:	30000341 GIS Technician I
Position Abbrevi...	GIS Tc I
Position Name:	GIS Technician I
Organizational...	20000072 Bureau of Technology Servic
* Business Area:	MF06 Tech Svcs
* Cost Center:	MFTS000009 Support Center

Account Assignment

Company Code:	COP1 City of Portland
* Personnel area:	1250 OMF-BTS

09

After you have clicked Send, you will receive confirmation message that the Data was sent, meaning it was moved into SAP and is now master data.



– END –