

PA Actions Review [PA Bureau Approver]

Module: PA, Processes & Forms Application // **Process:** Bureau Approver reviews actions submitted by OBPA's for processing.

PA Form Used: Personnel Action Request Form (PAR)

The screenshot shows the City of Portland Oregon website. The top navigation bar includes 'My Account', 'Sign Out', and a search bar. The main navigation menu has 'Employees' highlighted with a red box. Below the menu is a large image of a bridge over water. The 'Sign-In' form is visible, with a red box around the 'PortlandOregon.gov User Name' field (containing 'pftestom2') and the 'Password' field (containing '*****'). A 'Sign-In' button is located below the password field. To the right of the sign-in form is a 'New to PortlandOregon.gov?' section with a 'Create a New Account' button. At the bottom of the page, there is a copyright notice: 'Copyright © 2016 City of Portland - Disclaimer & Privacy Policy'.

Documents Covering PA Actions in this Workflow:

1. Employee to Retiree
2. Extend Temporary Appointment
3. New Hire
4. Regular Action
5. Rehire
6. Status Change
7. Temporary / Limited Duration Appt.
8. Bureau Approver Review (this document)
9. BHR Business Partner Review
10. BHR Final Review
 1. BHR Review
 2. PA Initiator Completes Long-Form
 3. BHR Completes Review

The Organizational Bureau Personnel Administrator (OBPA) begins the process by using the PA Actions form through the SAP Portal and routes the form to an Approver. As an approver your role is to review the submitted action before sending to BHR for a final review and processing.

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.

The screenshot displays the 'Employee Portal' for City of Portland employees. The top navigation bar includes links for Home, Employee Services, Forms Library, Policies & Procedures, Training & Development, Benefits & Wellness, About The City, and Contact Us. A left sidebar contains a vertical menu with the same categories. Below the menu is an RSS subscription button. The main content area features a large image of three people working outdoors. Underneath the image are two columns of links. The 'Employee Services' column lists: 'Access SAP portal for your time sheet, leave balances, and CityLearner; log onto your Outlook account from home; access your W-2' (with a red box around the link), 'SAP CityLink Portal', 'Office 365 Portal', and 'Online Pay Statements'. The 'Forms Library' column lists: 'Links to internal forms from various bureaus', 'Accounting Forms', 'Attorney's Office Forms', 'Auditor's Office Forms', and 'Budget Forms'.

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The screenshot shows the SAP CityLink portal for a Bureau Approver. The top navigation bar includes the City of Portland logo, the text 'The CITY OF PORTLAND Oregon | SAP CityLink', the user's name 'PortlandOregon.gov Log off', and a welcome message 'Welcome: Bureau Approver,'. Below the navigation bar, there are three folder icons: 'Employee Self-Service', 'Bureau Approver' (highlighted with a red box), and 'Employee Programs'. A secondary navigation bar contains tabs for 'Overview', 'Personal Information', 'Time', 'Compensation', 'CityLearner', and 'Help'. The main content area is titled 'Overview' and contains an introductory paragraph: '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.' Below this, there are four main sections, each with an icon and a list of quick links:

- 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 Requests](#), [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. Quick Links: [CityLearner](#), [Training History Report](#).

There is also a **Help** section with a quick link to [ESS Help](#).

03

Once logged into the SAP Portal, click on the **Bureau Approver** folder.

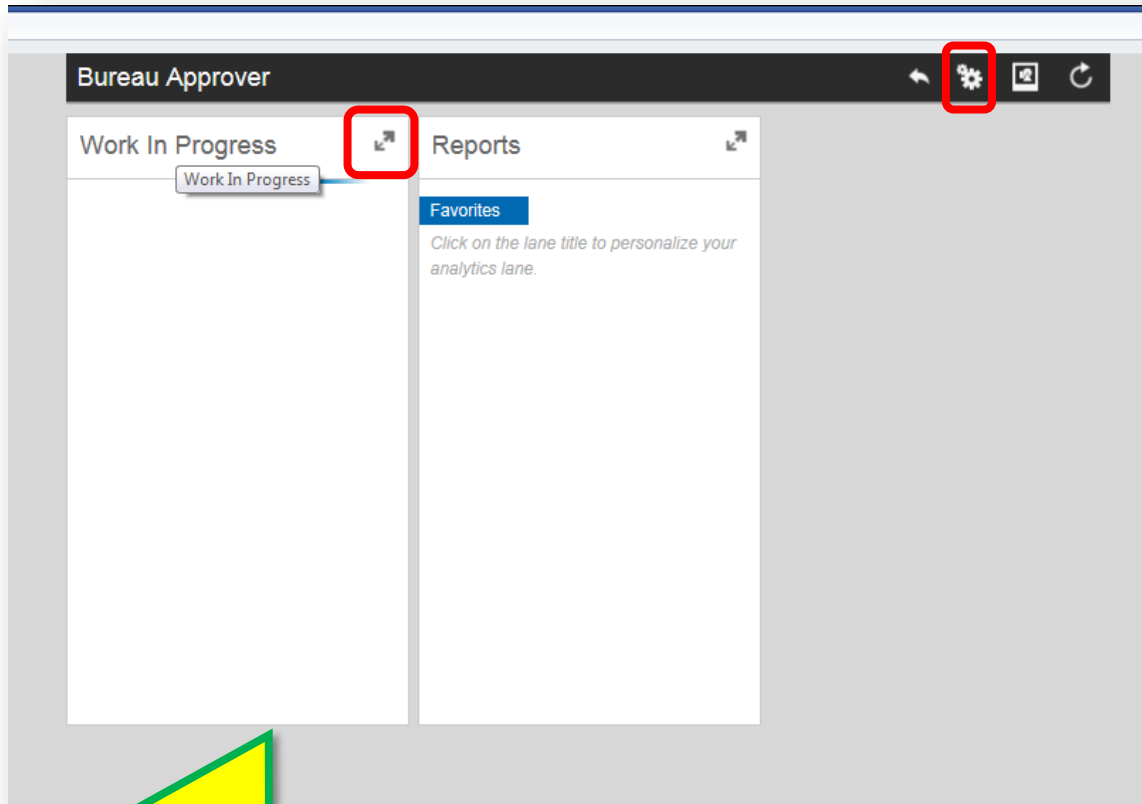
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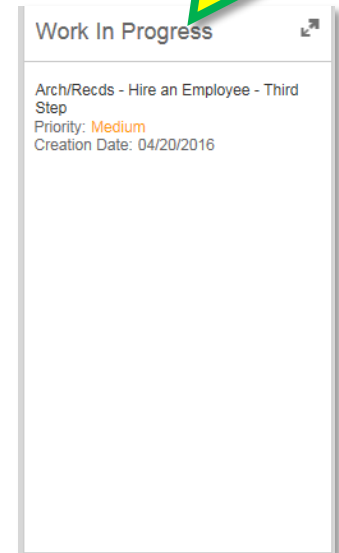
PA Form Used: Personnel Action Request Form (PAR)

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. Click on the **Actions expander button**.



Items Saved as drafts or items sent to you through workflow are found in the "Work in Progress" swim lane. If you don't see Work In Progress on your landing page, click the gear icon to add it.

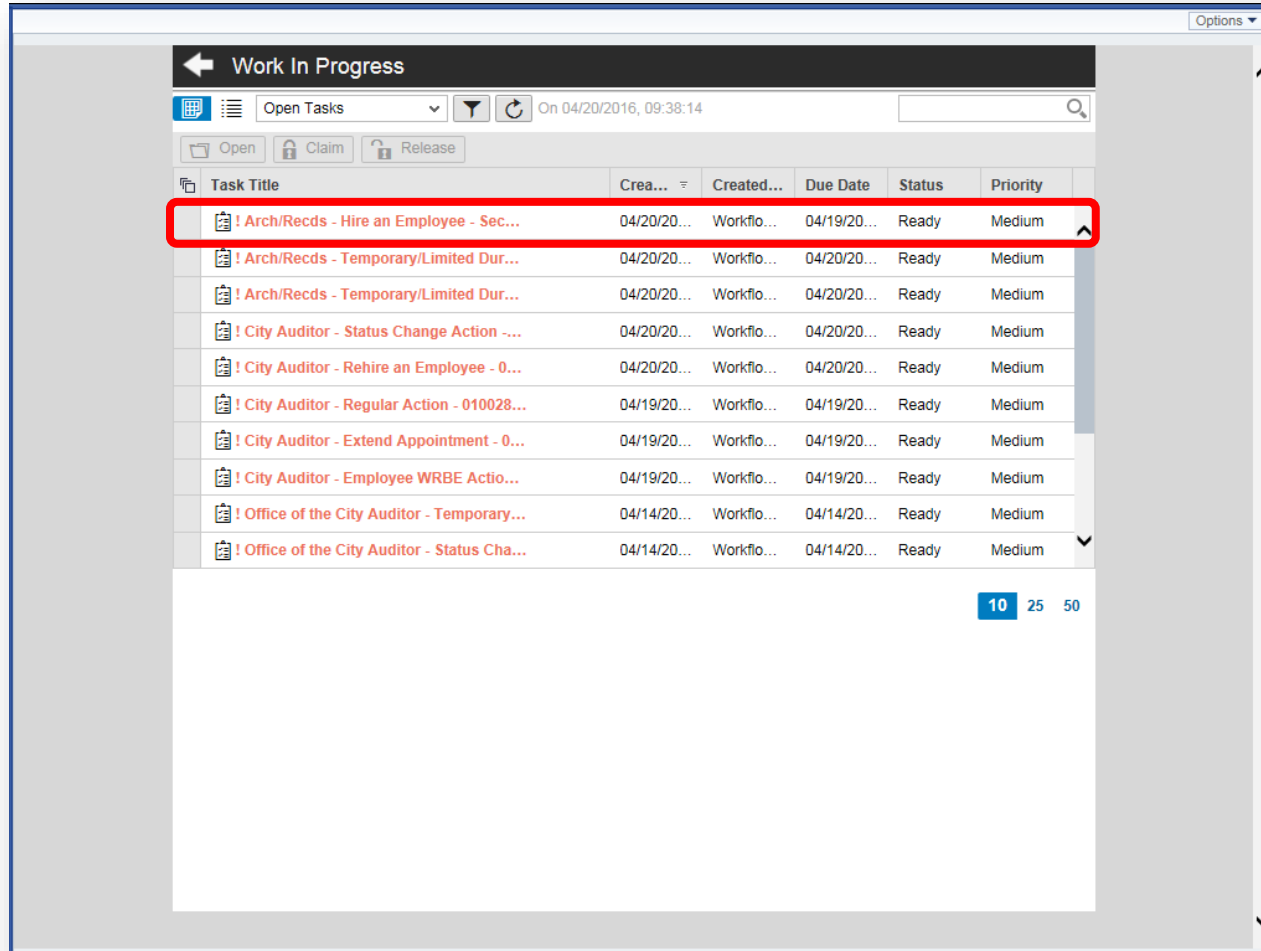


Each white box displayed here is called a "Swim Lane" and can be moved easily by dragging and dropping into the position you prefer.

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The screenshot shows a 'Work In Progress' window with a table of tasks. The table has columns for Task Title, Created Date, Due Date, Status, and Priority. The first row is highlighted with a red box.

Task Title	Created...	Created...	Due Date	Status	Priority
! Arch/Recds - Hire an Employee - Sec...	04/20/20...	Workflo...	04/19/20...	Ready	Medium
! Arch/Recds - Temporary/Limited Dur...	04/20/20...	Workflo...	04/20/20...	Ready	Medium
! Arch/Recds - Temporary/Limited Dur...	04/20/20...	Workflo...	04/20/20...	Ready	Medium
! City Auditor - Status Change Action -...	04/20/20...	Workflo...	04/20/20...	Ready	Medium
! City Auditor - Rehire an Employee - 0...	04/20/20...	Workflo...	04/20/20...	Ready	Medium
! City Auditor - Regular Action - 010028...	04/19/20...	Workflo...	04/19/20...	Ready	Medium
! City Auditor - Extend Appointment - 0...	04/19/20...	Workflo...	04/19/20...	Ready	Medium
! City Auditor - Employee WRBE Actio...	04/19/20...	Workflo...	04/19/20...	Ready	Medium
! Office of the City Auditor - Temporary...	04/14/20...	Workflo...	04/14/20...	Ready	Medium
! Office of the City Auditor - Status Cha...	04/14/20...	Workflo...	04/14/20...	Ready	Medium

05

Actions ready for review are listed in most recent at top to oldest at bottom by default.

Click on a column to sort a different way.

Click on **the first line** to open it for review.

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Hire an Employee

Save Draft | Back to Author | Approve | Reject | Form Utilities

Attachments (1)

Hire an Employee (US)

New Hire

Reason Code:	New Employee	Process Reference Number:	00000000314
Pers. Number:	01009582	Employee Name:	Tiberius Caesar
Begin Date:	04/19/2016	Assignment End Date:	04/19/2017

Requested Action(s) - Check all that Apply

Type of Appointment	Organizational Management Actions
<input checked="" type="radio"/> * Temporary HR 3.03	* Under/Over/Lateral Fill H... <input checked="" type="checkbox"/>
<input type="radio"/> * Casual Other HR 3.03	* Double Fill HR 3.03: <input type="checkbox"/>
<input type="radio"/> * PERS Retiree HR 3.06	
<input type="radio"/> * Recruitment/Other HR 3.03	

Hiring Incentives

Appointment above entry rate HR 8.04:	<input type="checkbox"/>
Vacation Credit up to 40 hours HR 3.01:	<input type="checkbox"/>
Vacation accrual date adjustment HR...	<input type="checkbox"/>

Requested Status For This Employee

New Hire Position:	40019901	Cmt Sv I	Position End Date:	12/31/9999
Position Type:	060	Casual		
Job No:	30000589	Cmt Sv I		
Over Under Later - Job:	30000013	Office Support Specialist III		
Personnel area:	1100	City Auditor	Pers. Sub Area:	DCTU-AFSCI DCTU-AFSCME
Employee group:	Regular	Regular	Emp. Sub Group:	FT Covered, I FT Covered, Negative

Validate WS

06

As PA Approver, your role is to review forms workflowed to you.

You will either:

- a) Approve;
- b) Reject; 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).

Note that for you, the Approver, nearly every field on the form is greyed out (or locked) for editing. Your job is only to review the form.

Rejections are effectively "Cancellations" of the action being taken. So if there is a correction to be made, don't reject or withdraw. Instead, make Process Comments and send the form "Back to Author."

Scroll down to review remainder of the form.

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Hire an Employee

Save Draft | Back to Author | Approve | Reject | Form Utilities

Requested Status For This Employee

New Hire Position:	40019901	Cmt Sv I	Position End Date:	12/31/9999
Position Type:	060	Casual		
Job No:	30000589	Cmt Sv I		
Over Under Later - Job:	30000013	Office Support Specialist III		
Personnel area:	1100	City Auditor	Pers. Sub Area:	DCTU-AFSCI DCTU-AFSCME
Employee group:	Regular	Regular	Emp. Sub Group:	FT Covered, I FT Covered, Negative
	Validate WS			
Work Schedule Rule:	MF 0900-1700		Weekly working hours:	36.25

Basic Pay

Reason for Change:	02	New Hire/Rehire	Capacity Util. Level:	100.00
Pay scale type:	01	Represented	Pay Scale Area:	DT DCTU
Pay Scale Group:	SCL02255		Pay scale level:	Y2
Work hours/period:	72.50	Bi-weekly	Next increase:	
Annual salary:	53,164.80	USD		

Wage Type	Wage Type L...	Operation Ind...	Amount	Currency	Indirect Valua...	Add to Total...	Number/Unit	Unit Text
OS00	Regular Sala...	<input type="checkbox"/>	2,044.80	USD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	
		<input type="checkbox"/>	0.00		<input type="checkbox"/>	<input type="checkbox"/>	0.00	

Justification for Requested Action

Fill In For Absent Employee:

07

Review all of the information on all parts of the form.

If any data is inaccurate or not desired, send **Back to Author** for edits. Or **Reject** the form if it is not needed.

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Hire an Employee

Save Draft | Back to Author | Approve | Reject | Form Utilities

Add Row | Delete Row

Wage Type	Wage Type L...	Operation Ind...	Amount	Currency	Indirect Valua...	Add to Total...	Number/Unit	Unit Text
0S00	Regular Sala...	<input type="checkbox"/>	2,044.80	USD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	
		<input type="checkbox"/>	0.00		<input type="checkbox"/>	<input type="checkbox"/>	0.00	

Justification for Requested Action

Fill In For Absent Employee:

Pending Recruitment:

Emergency/Natural Disaster:

Train New Employee:

Workload Need:

Others(Update Text in Rec...):

Comments

Previous Comments: OMPA Forms Initiator 04/19/2016 09:36:47
Note: Record comments become part of the employee record at the end of the Processes & Forms Workflow and can be viewed as HR Master Data in SAP.

Record Comments: Add comments if needed |

Process Comments: Process comments only accompany the forms in the Processes & Forms workflow and are discarded once the data from the forms is saved into SAP.

08

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

Record Comments:

Official comments that will be kept with the form and maintained in accordance with the records retention schedule.

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.

Please include a date, your initials, and indicate the name of the person the note should go to or was meant for.

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

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The screenshot shows the 'Hire an Employee' form. At the top, there are navigation buttons: 'Save Draft', 'Back to Author', 'Approve', 'Reject', and 'Form Utilities'. Below this is the 'Attachments (0)' section, which is highlighted with a red box. Inside this section, there is a dropdown for 'Attachment Type' set to 'General Attachments', a text field for '* Path:' with a 'Browse...' button next to it (also highlighted with a red box), and an 'Attach' button. Below the Attachments section is the 'Hire an Employee (US)' section. Under 'New Hire', there are fields for 'Reason Code' (New Employee), 'Process Reference Number' (00000000314), 'Pers. Number' (01009582), 'Employee Name' (Tiberius Caesar), 'Begin Date' (04/19/2016), and 'Assignment End Date' (04/19/2017). The 'Requested Action(s) - Check all that Apply' section includes 'Type of Appointment' (radio buttons for Temporary HR 3.03, Casual Other HR 3.03, PERS Retiree HR 3.06, and Recruitment/Other HR 3.03), 'Organizational Management Actions' (checkboxes for Under/Over/Lateral Fill H... and Double Fill HR 3.03), and 'Hiring Incentives' (checkboxes for Appointment above entry rate HR 8.04, Vacation Credit up to 40 hours HR 3.01, and Vacation accrual date adjustment HR...). The 'Requested Status For This Employee' section includes 'New Hire Position' (40019901), 'Cmt Sv I', 'Position End Date' (12/31/9999), 'Position Type' (060), and 'Casual'.

09

If you have to add any attachments, make sure to do that before you send. Attachments can be done at any time and can only be in PDF format.

To attach a form, click on the arrow next to Attachments.

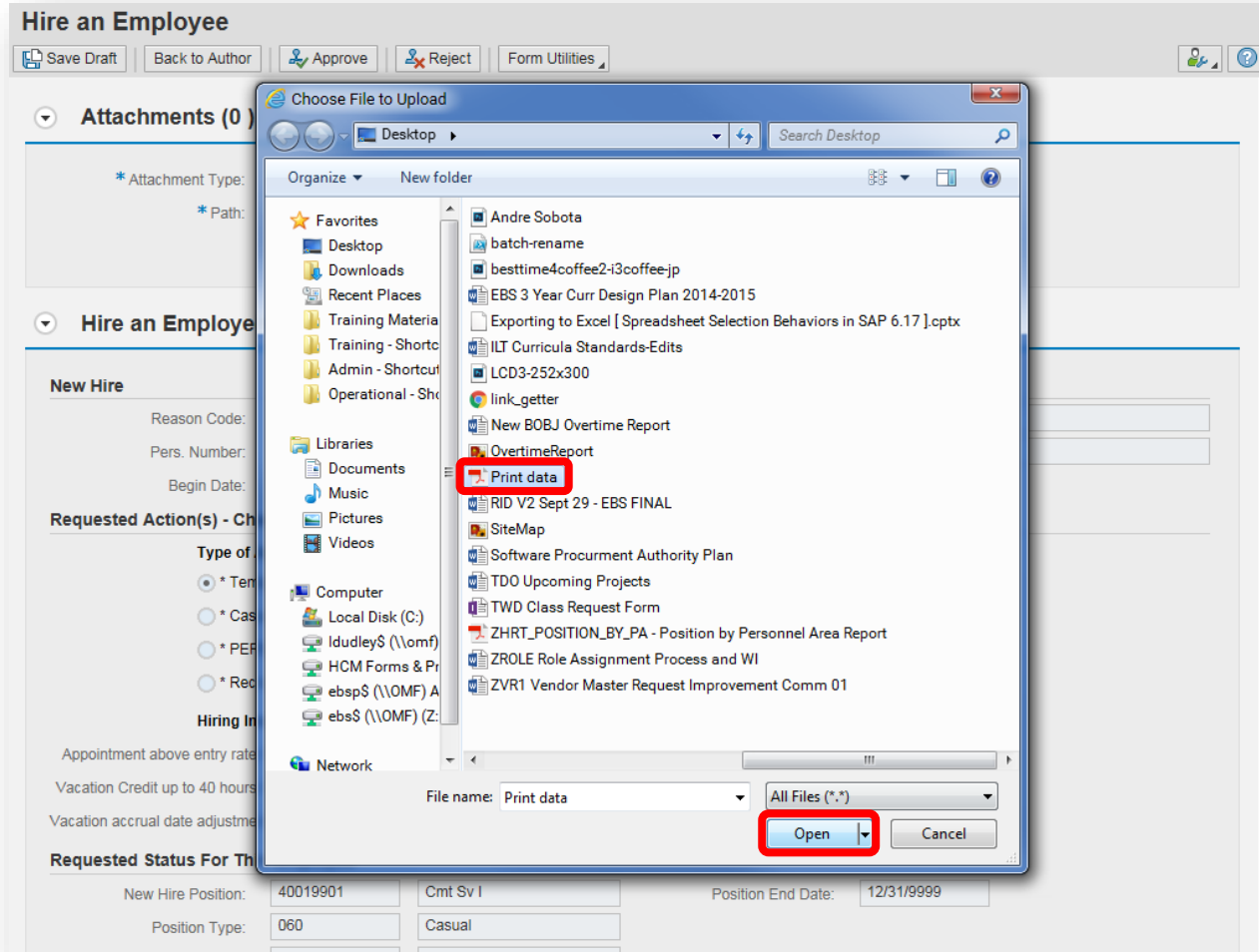
With the Attachments pane open, click on **Browse**.

A pop-up file explorer window will appear.

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10

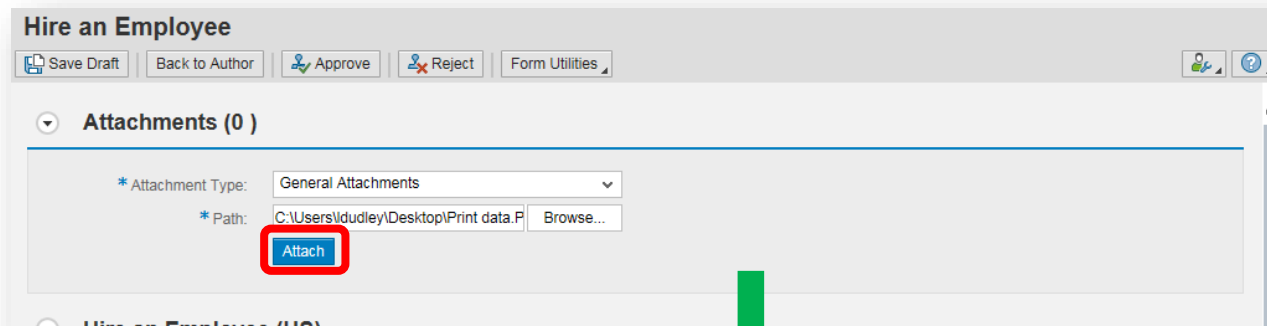
In the file explorer window, locate the file you want to attach to the form.

Click **Open**.

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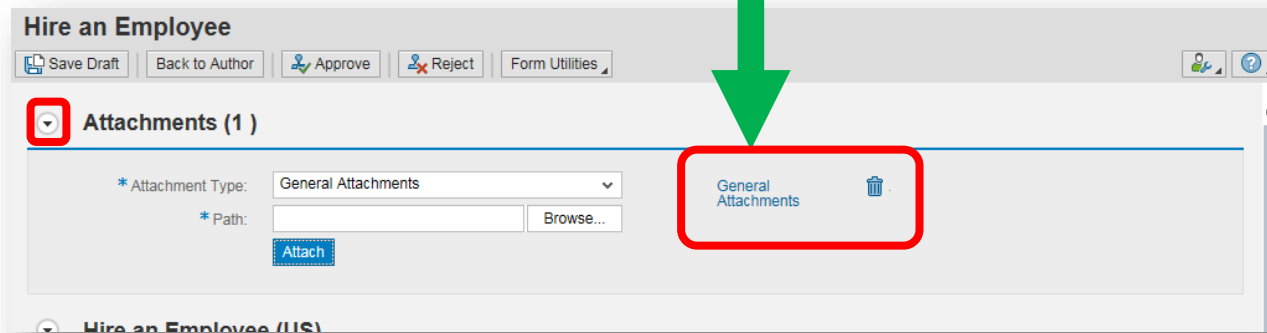
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The screenshot shows the 'Hire an Employee' form with the 'Attachments (0)' section expanded. The 'Attachment Type' is set to 'General Attachments' and the 'Path' is 'C:\Users\ldudley\Desktop\Print data.P'. The 'Attach' button is highlighted with a red box.

11

After the file is selected, click **Attach** to upload and attach the file to the form.



The screenshot shows the 'Hire an Employee' form with the 'Attachments (1)' section expanded. The 'Attachment Type' is set to 'General Attachments' and the 'Path' is empty. The 'Attach' button is highlighted with a red box. A green arrow points from the 'Attach' button in the previous screenshot to the 'General Attachments' text in this screenshot.

Note that after doing this, you will see **General Attachments** and a **Trash Can** icon.

To view the uploaded document click **General Attachments**. To delete the uploaded document click the **Trash Can** icon.

Click the arrow to the left of the Attachments header to close the Attachments pane.

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Save Draft | Back to Author | Approve | Reject | Form Utilities

Attachments (1)

Hire an Employee (US)

New Hire

Reason Code: New Employee | Process Reference Number: 00000000314
Pers. Number: 01009582 | Employee Name: Tiberius Caesar
Begin Date: 04/19/2016 | Assignment End Date: 04/19/2017

Requested Action(s) - Check all that Apply

Type of Appointment

- * Temporary HR 3.03
- * Casual Other HR 3.03
- * PERS Retiree HR 3.06
- * Recruitment/Other HR 3.03

Organizational Management Actions

- * Under/Over/Lateral Fill H...
- * Double Fill HR 3.03:

Hiring Incentives

Appointment above entry rate HR 8.04:

12

Click **Approve** to send on to your HR Business Partner for review and approval.

Step Completed

Request approved

You will receive a confirmation message of your action.

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The screenshot shows a web application interface titled "Work In Progress". At the top, there is a navigation bar with a back arrow and the title. Below it, there is a search bar and a refresh button. The main area contains a table of tasks. The first task is highlighted with a dashed blue border. The table has columns for Task Title, Created Date, Due Date, Status, and Priority. The tasks listed are:

Task Title	Created...	Due Date	Status	Priority
Arch/Recds - Hire an Employee - Sec...	04/20/20...	04/19/20...	Ready	Medium
! Arch/Recds - Temporary/Limited Dur...	04/20/20...	04/20/20...	Ready	Medium
! Arch/Recds - Temporary/Limited Dur...	04/20/20...	04/20/20...	Ready	Medium
! City Auditor - Status Change Action -...	04/20/20...	04/20/20...	Ready	Medium
! City Auditor - Rehire an Employee - 0...	04/20/20...	04/20/20...	Ready	Medium
! City Auditor - Regular Action - 010028...	04/19/20...	04/19/20...	Ready	Medium
! City Auditor - Extend Appointment - 0...	04/19/20...	04/19/20...	Ready	Medium
! City Auditor - Employee WRBE Actio...	04/19/20...	04/19/20...	Ready	Medium
! Office of the City Auditor - Temporary...	04/14/20...	04/14/20...	Ready	Medium
! Office of the City Auditor - Status Cha...	04/14/20...	04/14/20...	Ready	Medium

At the bottom right of the table, there are pagination controls showing "10 25 50".

13

You can now continue reviewing other forms sent to you, or log off.

– END –