

Processes & Forms: Updates

WHAT:

- New Hire Form Revised (To Make Requesting Computer Access from BTS Quicker)
- Miscellaneous Changes to All Forms
- Updates to the Process Browser



WHEN:

Wednesday, August 31st



ENTERPRISE
BUSINESS SOLUTION
People, Process, System

Summary

New Hire Form Changes to Obtain an SAP UserID

- The New Hire “Short Form” now has fields for the legal name of new employees.
- Once the Short Form is sent on for approval, the auto-generated email will provide an SAP UserID which you can use to fill in the BTS network request.

Updates to All P&F Forms

- All forms (except Create Position) will register a Hard Stop when there are inconsistencies in pay details.
- A “Reject” button has been added to all forms (except Create Position) at the 1st approval step for OM/PA Initiators.
- Forms “Returned to Author” by BHR which were not going back to the Initiator has been resolved.

- Reported Issue of crossing of Pay Scales and Pay Grades for Over/Under/Lateral Fill assignments has been resolved.

Process Browser Changes

- Updated form effective dates will now show in the Work in Progress swim lane as updated due date.
- Employee Personnel Numbers (PERNRs) display in the Work in Progress swim lane for New Hires.

Details: New Hire Form Changes

The New Hire Form has been revised to assist Bureau P&F Initiators in requesting computer access and account setup for new employees. This process will allow BTS Helpdesk to set up computer user IDs without waiting for the new hire action to be entered in SAP.

The new hire form now has two separate fields to indicate the Legal Name – First and Last. These fields must now be populated in order to save and send the “short form” to the next approval step.

The screenshot shows the 'Hire an Employee' form interface. At the top, there are buttons for 'Check', 'Send', 'Save Draft', and 'Form Utilities'. Below this is an 'Attachments (0)' section and a 'Hire an Employee (US)' section. The main form area is titled 'New Hire' and contains several input fields:

- 'Reason Code': A dropdown menu.
- 'Pers. Number': A text field containing '01009538'.
- 'Begin Date': A date field containing '08/23/2016'.
- 'Process Reference Number': A text field.
- 'Legal Name - First': A text field, highlighted with a red box.
- 'Assignment End Date': A date field.

If you try and save the form without the Legal Name – First and Last, you will see this error message.

The screenshot shows the 'Hire an Employee' form with error messages. At the top, there are buttons for 'Check', 'Send', 'Save Draft', and 'Form Utilities'. Below this are two error messages, each preceded by a red exclamation mark icon:

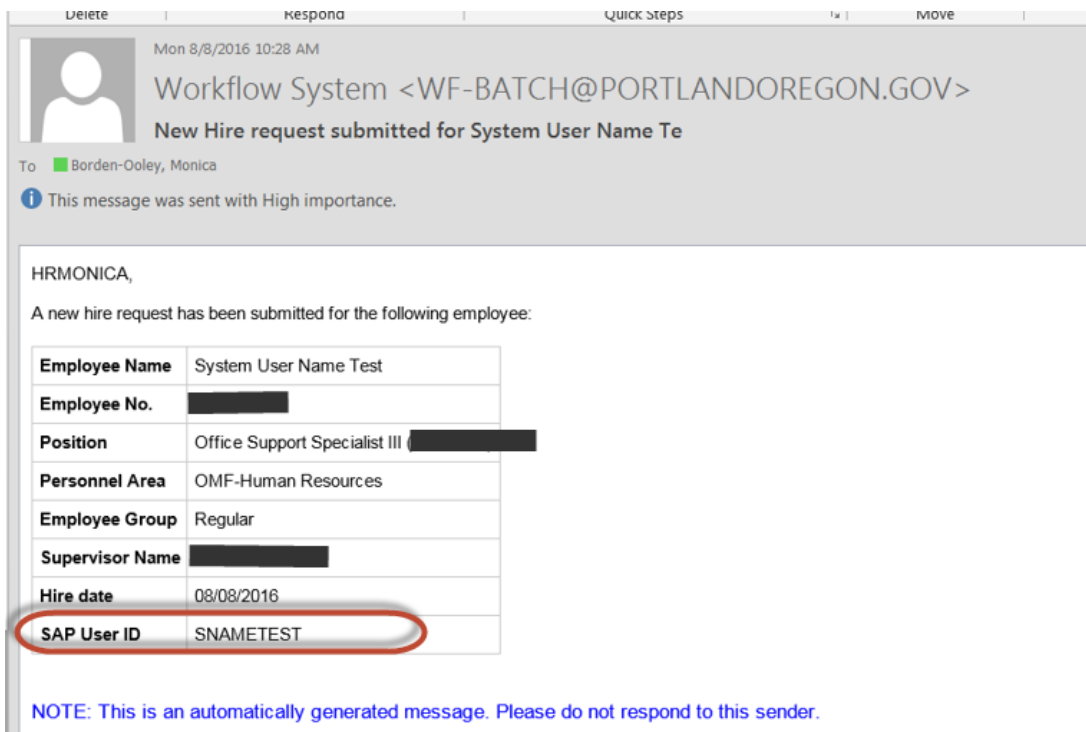
- Complete the required entry field "LEGAL_FIRST_NAME"
- Complete the required entry field "LEGAL_LAST_NAME"

The Legal Name – First and Last will show in each step of the “short form”, approval steps 1 through 4. In addition, the Legal Name – First and Last will show in the “long form” presented at the 5th approval step in the New Hire section of the form.

However, Bureaus should still expect to enter a First and Last name in the Personal Data section of the long form. The name does not auto populate from the short form, which allows Bureaus an opportunity to correct the name if it was entered incorrectly. The information from this section will populate SAP Infotype IT0002 Personal Data.

Once the form is without error and sent on to the 2nd approval step, an e-mail is sent directly to the initiator of the form with the new SAP User ID included. You can then use the information in the email to fill in the required fields in the BTS network request form for the new employee in your Bureau.

For more information about the approval steps, refer to the workflow document [here](#).



The screenshot shows an email interface with a header bar containing 'Delete', 'Respond', 'Quick steps', and 'Move' options. The email is dated 'Mon 8/8/2016 10:28 AM' and is from 'Workflow System <WF-BATCH@PORTLANDOREGON.GOV>'. The subject is 'New Hire request submitted for System User Name Te'. The recipient is 'Borden-Ooley, Monica'. A note indicates 'This message was sent with High importance.' The main body of the email addresses 'HRMONICA' and states 'A new hire request has been submitted for the following employee:'. Below this is a table with the following data:

Employee Name	System User Name Test
Employee No.	[REDACTED]
Position	Office Support Specialist III [REDACTED]
Personnel Area	OMF-Human Resources
Employee Group	Regular
Supervisor Name	[REDACTED]
Hire date	08/08/2016
SAP User ID	SNAMETEST

A red oval highlights the 'SAP User ID' field. At the bottom of the email, a note reads: 'NOTE: This is an automatically generated message. Please do not respond to this sender.'


Example of BTS Employee Request Form and the required information needed to be submitted which is contained in the notification email.

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Employee Information

First Name: Middle Initial: Last Name:

* NOTE: Per City policy, last name must be the legal name as shown above. First name may be a nickname or variation of legal first name ("Bob" for "Robert" for instance). BTS may need to modify if there is another user with a similar name as there cannot be two users with the same login, however user name can be the same.

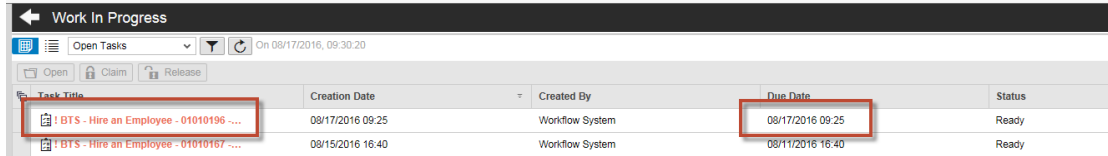
SAP Employee # (Pernr): SAP Employee Network Login:
Bureau/Company: Interoffice Mail:
Physical Location: Employee Phone Number:
Employee Manager:  Employee Title:

Details: All Form Updates

- For all forms except Create Position, a hard stop will occur when an employee's job is set on a bi-weekly pay grade (GRD), the employee has a Negative Employee Sub Group (ESG), but the data from IT0008 is presenting in the form with an hourly pay grade (HGR). This occurs because either the pay associated with the position is incorrect, or, there is an existing active planned compensation record on the position. Please contact BHR & PY Services to get help correcting this error. Please note: the form does not produce a hard stop when an employee's job is set on a bi-weekly pay grade (GRD), the employee has a Positive Employee Sub Group (ESG), but the data from IT0008 is presenting in the form with a bi-weekly pay grade (HGR). That functionality will have to be added in the future.
- A reject button has been added to all forms (except Create Position) at the 1st approval step for OM/PA Initiator. This is so that a form that has been returned to the OM/PA Initiator can be rejected if needed. Please note, there is also a reject button at the 5th step so that a form that has been returned to the OM/PA Initiator can be rejected at that step if needed.
- Forms that were being "returned to author" by BHR at the 6th step, were not going back to the OM/PA Initiator at the 5th step. This has been resolved.
- An issue was occurring on all forms (except Create Position) for Over/Under/Lateral fill requests that crossed pay scale and pay grades. For example: if the position's associated job pay was a pay scale and the requested Over/Under/Lateral pay was a pay grade, or vice versa, a hard stop error was occurring. This has been resolved.

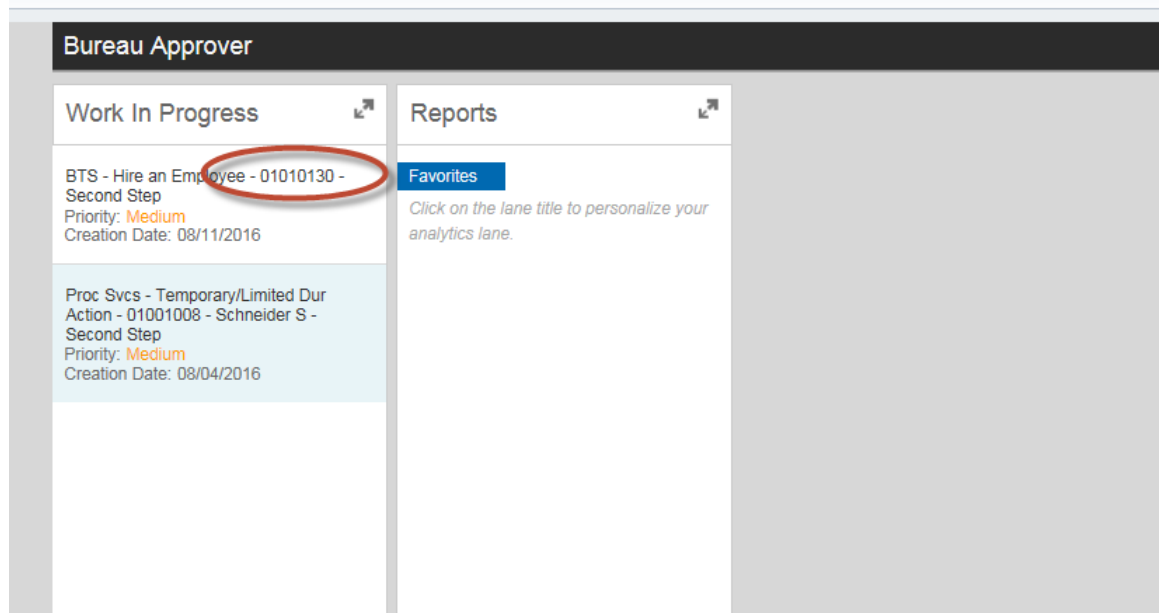
Details: Process Browser Changes

1. When a user changes the effective date of the form, the updated effective date will show in the expanded Work in Progress swim lane as the updated due date.



Task Title	Creation Date	Created By	Due Date	Status
BTS - Hire an Employee - 01010196 - ...	08/17/2016 09:25	Workflow System	08/17/2016 09:25	Ready
BTS - Hire an Employee - 01010167 - ...	08/15/2016 16:40	Workflow System	08/11/2016 16:40	Ready

2. An employee personnel number (PERNR) has been added to the WIP swim lane for New Hire employees. This is to help identify newly hired employees in your Bureau.



Bureau Approver

Work In Progress

BTS - Hire an Employee - 01010130 - Second Step
Priority: Medium
Creation Date: 08/11/2016

Proc Svcs - Temporary/Limited Dur Action - 01001008 - Schneider S - Second Step
Priority: Medium
Creation Date: 08/04/2016

Reports

Favorites

Click on the lane title to personalize your analytics lane.

For more information:

- [Processes & Forms Project Site](#)
- [Processes & Forms Support Materials](#)
 - [Print Instructions](#)
 - [Video Instructions](#)

If you have any questions, please contact: BHR & PY Services at Inbox, SAP BHR or Monica Borden-Ooley or De Ann Kamish on the EBS team.

