



PAF Workflow

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Good morning. To get started, I'm Beth Kuehl from Human Resources. One of my responsibilities is helping managing the PAF system. I know a lot of names here, I don't know a lot of faces. So, I'd bet if you were to tell me your name, I'd say, "Oh, yeah, I've received PAF questions from you." So, today we're going to get started talking about the rework of the PAF workflow which has been a long time coming. We've wanted this since 2009, so we are very excited to be launching the new workflow.

I'm going to start with getting into an actual example. Maybe not... My screen went gray, so, I apologize. Let me get into this right away. Linda, did you login? Ok, I'm sorry, I'm going to have to log you out so I can login. Ok, I apologize.

So, what I'm going to be accessing right now is actually we are going into a test environment for the PAF system. What I'd like to show you is an actual example of PAFs and the changes we've done to the workflow, and also the help that we have online to help support your work. I'm going to begin by actually getting into the PAF system in a test environment and I've created a quick link here to do that. I am going in as Michelle Mullings-Shand...thank you for letting me borrow your test account. I'm not sure I gave you much choice. Oh, I did. Thank you. Try that again. So, I've created two PAFs, both of them for me. I am now going to have a new assignment in special education, so if anyone is here from special education you're going to be seeing that shortly, and I'm also receiving a special comp with a lot of money associated with it, which is really great in a test environment. I've been told often that it will be declined, so again, it's in a test environment. I'm going to start with an actual example of a new. Now, I am a P&S employee, Professional and Scientific employee, so there are different workflows for every single group. This particular PAF I've already created and where I'm going to take you right now is to the workflow tab. With the workflow tab, you're going to see that there is going to be different changes that you will do on a PAF that will actually rework different changes that you will do on a PAF that will actually rework the workflow and I'm going to give you some examples shortly by going into the help and showing you that documentation.

So, how many of you have created a PAF in the past, in the audience here? How many of you have approved PAFs? So, I'm going to address actually both, with more of a focus on those creating the PAFs. How many have you been in recently since this new change? Ok, so this is going to be review and then I'm going to give you some tips, some guiding tips.

The workflow steps, try to pay really attention to articulate functional instructions on how to use the workflow. You will see a reset workflow button. At any time that you want to revert it back to the default, you can do that. In the default themselves, I'm going to actually go into clicking here at this link, to learn more click here. This is about the workflow and when we did a redesign of this workflow, I

actually did a lot of statistical analysis to look at what kind of workflow can we implement to hit the largest audience...what defaults can we set? Through that I can predict that, hopefully, we are going to hit, hopefully, 80% or 86% of all. For the default, we are looking at 86% of the workflows to match that. What that means is we looked at two different scenarios. Who are supervising employees, who are their department heads/directors, and then seeing if there is a pattern? So, establishing a pattern, we felt, was our goal, again we are going to hit 86. What does it mean for those 14%? Well, the 14%, a lot of them are very unique and so we had to keep that in mind and what can we develop to also manage those 14%? In our previous workflow, we could not. Let's just be honest. But now, we feel like we can do that. So, we are looking at 86% as the default. The entire help is right here, from viewing an example which we are going to go over today. Everything is labeled with tips. I'll hit the back button. We also have instructions. How can you customize? How can you reset the workflow? How do you track the workflow?

And then, viewing PAF options. So, again, going through all of the instructions as it relates to the workflow. On the right hand side, we also have some workflow tips. A lot of these were the same as printed before. You'll see PAF workflow just talks about how, what we are using. What is unique about this and I'm very excited. I've been in technology for almost 15 years now and I will honestly say that the team that worked on this particular programming I was very excited that they were thinking "outside of the box." I feel they have developed a workflow that is better than I could have imagined and I'm extremely picky. Chad Wittrock and also Melanie Abbas worked on this and they came back and presented some great ideas and we have implemented them. So this PAF system is taking advantage of the PAF system itself, looking at very, very unique logic, and I will show you the specs on that. We also are using the workflow within eBusiness Suite. So, this talks about that.

It also talks about notification emails. Notification emails you've already received. I don't know if you've received timecards or PAFs, they come at certain times during the day. So, you can see Monday through Friday they come at 7:30 in the morning telling you that you have a notification out there to approve. These types of notifications, when you get them to approve, they don't come in instantly, they come at these times of day. Approval notification timeouts. An example. I'm going to show you that example shortly of what a notification timeout is. They will disappear after three working days. So, after a PAF is completed, if you were to go into eBusiness Suite, you would notice it says completed behind it. They will stay there for three days unless you click the "ok" button, then it will disappear.

Some other additional changes that have happened with the PAF system. It was requested by the auditors and also VPs that no employee can approve their own PAF. This makes perfect sense and I have the logic behind here. As they use the term checks and balances. So, again, an employee cannot approve their own PAF. We also have some changes in the the Dean approval and I will explain that in the example itself. So, I'm going to go back to this PAF. Again, this PAF is for myself. It's for a new assignment and this is the actual default that happened. You can see right away that I'm a Professional and Scientific employee so it is requiring that the Professional and Scientific employment team approve this PAF first and so that is here. So, that is the default and you cannot remove that. That is automatically programmed in. I am paying for this particular position as a grant. If I click back on the LD tab you will see that I'm actually paying for this through a grant, partly. I'll go back to the workflow. So,

therefore, now we need to have a principal investigator. Again, with that rule, as a an employee cannot approve their own PAF, there will be times when you need to add a PI and if it is that person, you will need to add the department head. If it's for the same employee, add the department head instead, because it will not allow you, again, to have the employee approve their own PAF. The next thing it will do default to is PAF LD Org Manager and what I am a little bit excited about is right below it, it's going to tell you what LD that is based on. So, you can see right here, it is based on alternate LD. So, if you question that, all you have to do click back on the LD look at the alternate labor distribution to determine why was that person selected. You're going to know right away. We have here, it's default to Frank, but it allows me to change. This is to help that 14% that actually don't match and I'll give you an example. We actually have for example, custodians within let's say Panther Village. They actually need to be approved by a completing different department, a completely different division. So, this gives them the flexibility to click on "change" Maybe not. We'll do it again. And I can choose someone else. It tells you who the default was, so I don't forget that. It also shows that for everyone else, but again, it allows me to make a change. For the PI, I'm going to use someone in my office. And then, you'll see here that because I actually removed the department head from signing off, as the LD org, they still are going to sign off as the assignment org. Did you see how that kind of bumped it up? So, I'm still getting the appropriate approvals. If I were to remove Michelle Byers again as the PAF LD watch what happens. Frank comes back as active at the LD, but he becomes inactive at the org, because we don't need his approval twice. So, it's smart enough to know who you are adding and who should be defaulted, who should be hidden, and who should go to the next step.

Questions about the change for the add step feature? It will allow you to add anyone who is a staff or faculty member. So, it will be, I mean, please pay attention if you accidentally type in, you might type in a last name and select the wrong person. Like, for example, I know Schneider, Linda Schneider that's one I've used in the past for Dean Assistant. There's also, I think, a Lynn Schneider. So, she's gotten PAFs to approve in the past.

Yes? Good question. The question was, "If the PI cannot approve their own and the PAFs for them, how would they be notified?" That can be added right at the bottom. Can you see add additional notifications? FYI notifications? As of this morning, it will allow a notification to go to the employee. Now, an employee will receive a notification for all new PAFs all summer PAFs, and all special comps. They will not automatically receive one for a change or an end. Fortunately, some change appointments are not always positive and so we wouldn't want them to get something that they might feel uncomfortable about. In an end, they are leaving the University and no longer would need to see that PAF. So, that's another reason why they wouldn't get the end. So, if I needed to setup another PI, That was my PI, with Cindy Webb, I could add her a notification and she will now receive a notification at the completion of that PAF. Does that answer the question? Thank you.

We also have the Dean of Students Assistant to be able to be changed. We have a lot of uniqueness on campus where we have multiple people that play that role and we want to give these colleges that flexibility. So, you can change the Dean Assistant. If it is grant funded, again, it will automatically require grant approval. If it is a faculty position, it will automatically require Provost approval and then you'll see budget and then the super HRMS, I call it super woman, responsibility. That is Carol Brodie, she goes in

and hits the button and she actually processes the PAF. That is the steps in which the workflow follow. If there are two LDs, in two different departments or even divisions, you will see this list getting longer. It will be looking at the labor distributions to determine who should be approving.

The workflow completed notifications. This is quite large and this is brand new. We do have now new features that will be working as of this morning. The preparer will be emailed immediately once that PAF has been processed. So, it's no longer just a notification in eBusiness Suite, it is actually being replaced by an email. So, for those of you who monitor your PAFs to see, ok did I get this and has it been processed, you're going to get an email immediately. The same thing with P&S, it's going to tell you everything that's the difference. We have an email notification type that's going to be email and then a notification as I have highlighted here. This is an eBusiness notification the same that we've received in the past, just like a timecard notification, that will go to eBusiness Suite. Again, it will remain in their queue for three days and then clear up. Some changes that we've made at the request of Deans. Deans will not receive a notification. They were receiving quite a few, but the Dean's Assistants will receive email immediately. So, if there are any questions, you can go to the Dean Assistants, they will also receive emails. The Sponsored Programs will also receive emails. They have a new email address for support called paf-grants. So, as the PAF is processed. Ok, we'll also receive some additional emails. On an end PAF, they will now receive emails when that has been previously paid by grants they will receive that notification and if you are changing someone from a grant to a non-grant LD, they will also receive notification so that they can monitor that and make changes in their programs. The employee in this case, you'll see has a new PAF, so it's automatically defaulted that I will receive an email indicating that I have been setup. We have done this especially for faculty who are ready to get into the SIS System and other access. So, they will know when they can start getting into those other systems. And another change that we've added is we are now communicating more with the supervisors of those employees. So, the supervisors will also receive an email immediately as soon as the person is setup. We have the capability, just like we did in the past, to actually add three FYI notifications. Now, these are not emails, they are FYI notifications within eBusiness Suite. That will be the difference. It will be within eBusiness Suite. If I do not like the changes I've made, again I can hit "reset workflow" click "ok" and it will take me back to the default. If I were to come to the "Assignment Info" tab, and I were to change the supervisor, you will get a note indicating that this will now impact the workflow. I'm going to hit "save" and go to "next." Another way that I would impact the workflow is if I actually changed the LD. So, you could do a lot of work on the workflow tab, but go back to actually making all of these modifications and what would happen is the workflow will be reset. So, when I go back to the workflow tab, you're going to see building workflow. It will reset it, because I have now changed the supervisor and it needs to know that information so that they receive the appropriate emails.

The online help. I'm gonna go right down to the bottom very quickly to show you the detailed specifications. If you are like some of us who like to know exactly how this is setup and what are the criteria, you have full access to what we provided to ITS. We had a very large team work on this and reviewed it often and then we did quite a bit of testing. It probably took two months of testing and close to 250 PAFs we prepared. I went through the workflow just to test every little scenario that we could think of. So, this shows all of the different groups at the bottom and who approves who will receive email, and all of the little unique cases that we have on campus are demonstrated here.

I've gone through the PAF workflow, the new workflow, very quickly. It's been 20 minutes and I have to honor everyone else presenting behind me. Are there any questions that I can address?

Thank you for asking. The question is whether or not if we add a Foundation LD, will Foundation automatically approve. Yes. Just like in the past, it actually doesn't go to one person. It goes to a responsibility that could be shared by multiple people and it does go to Foundation for their approval. And they also receive a notification when it is completed.

Question in the back. The question is, excuse me, the question is for Grad Assistant PAFs. The supervisor receives an email. They currently are receiving an email when there is a status change is that what you are referring to? Ok. Ok. Will the supervisor approve a PAF? The answer to that is not for a grad assistant. They would if they were an institutional official, but not for a grad assistant. It's still requires the department head or Dean or whatever level you're putting your adding them as the PAF or whatever organization you're adding, it will be the manager which we consider the director department head as the approver, not the supervisor. But, the supervisor will be notified as soon as the PAF is completed.

Um, a very good question. Excuse me. The only one that is going to require...the question is whether or not you have to add someone in order, it says add, whether or not it's required requirement that they have to be added. The only one that is required requirement that you have to add is a Principal Investigator and the nice feature of this product or this new workflow is that if you don't add, it's going to tell you you need to add. You can't make that mistake. You're going to see additional approvers here, though. It says add, that is not a requirement though. You can add three more individuals to approve. So, the only add requirement would be a principal investigator if it is grand funded. If you see change, it is never required. Again, it's to address those 14% workflow that we could not accommodate through the default.

Other questions? I have to show you one more, real quick. I do have here a special comp. I'll go into workflow. And why I set this one up is just to demonstrate that this would have two different actual VPs approving it. One of the changes as the result of this group meeting is that they do want vice-presidents approval on Merit and P&S changes. The P&S employment and Merit employment does have the option to remove them when they receive it it is something unique that the VP has already approved, then they will actually remove that from the step, but it is defaulted to have both VPs, in this case, would have to approve. So that, again, is a request. So, here one example where it would look like it would go to two VPs and it knows to go to both VPs. Another, what I would like to quickly show you. I'm in as someone else. Another change is actually up here at the top. You're gonna see the workflow notification itself has been modified. Hopefully, this will allow you to sort a little bit easier to see those that have been most recently added. What I mean by that it first starts out with what type of PAF the effective date, and then the person's name. So, what it allows you to do when you're at the "home" reviewing your notifications is to be able to click on the subject line and group these items a little bit in more of a pattern. So, in this case, we have several approvals, but you'll see all the terms are grouped together then the effective dates. So, we can quickly address the effective dates first that we need to, because they are higher priority. So, we have changed again the subject line of those notifications to assist you.

Another PAR that we have into ITS is a button called "pending". What pending will allow you to do and I'll send out an email as soon as this is completed, it will allow you to actually kind of categorize. You know I've already looked at this one but I don't want to act on it yet, so I'm going to put it in a pending status. So, it gets that notification out of all the rest so that you can, again, another way to sort your PAFs.

The question is, if the PAF is in rejected status, does it have to go through all the approvals again? And, all my PAF preparers know the answer to this, and that is "yes". That is a stipulation. The reason why is if the PAF is rejected and changed, everyone needs to know about that change. It does take longer, we understand that, that's why we hope those people that do approve utilize communication through email and so forth to ask questions before they reject.

One thing that we highly recommend is when you are viewing PAFs to take advantage of "Click here to view and print a PAF." Only the PDF file of that PAF has all the details. You will not see all the notes in the notification itself. So, if you're being very thorough in your approvals, please open up the view and print PAF. We do have everyone's name up here, the preparer highlighted so you can easily click and email them a question. That's why we also provide their phone number. We are truly trying to promote communication with our preparers.

It is, nothing has changed within the notification itself and the question is can you ask, send more information by clicking on the "request information" button at the top and also at the bottom. So, yes, you can send it that way. Yes, it will and it will also show you I have an example here and I'm taking more time. I apologize. I'm going to go to "menu". I've already submitted one and gone through one step so that you can see it. If you want to track, and we ask the preparers to track their own PAFs, once you've submitted again I clicked on "menu", I went through that quickly, and then I click on "my submitted PAFs." These are submitted PAFs that are not in completed status. So, those are the ones that you really want to track. I'm going to click on the "open" button. If you want to see who it's waiting on, you can see that on this morning, the PAF P&S employment team has already approved this PAF. I am now waiting on the next person. Then it's going to tell me when A.J. has approved it and then it's going to tell me when the next person has approved it. If it's waiting on two different people, they can go out at any time if it is at the same level. If I want to know their comments, I click on the "history" tab. That has not changed. So the history tab is going to actually show the comment. If you want to know the rejected reason, and we have these in our instructions, you would still need to click on history.

Any other questions? I will be staying after this meeting so if you have any questions you would like to address about the workflow or about what is coming up in January, we are expecting probably 800 PAFs coming through. If you have questions, I will be on leave cross my fingers, before January 27th, but you never know. So, plan that I'll be here for January payroll, but if not, start sending your emails now if you have any questions.