



## **Workforce Management Organization**

### **PeopleFlow Automated PRF and PAF Processing System**

### **Module 1 – System Overview**

VERSION: 4.5

July 27, 2010

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## Introduction

Welcome to **PeopleFlow**, our web-based client for electronic submission and approval routing of PRFs (Personnel Request Forms) and PAFs (Payroll Action Forms). It is our ultimate goal that this module will assist you in the use of **PeopleFlow** to process PRFs and PAFs in an efficient and time saving manner. In this manual you will find information regarding accessing the system, navigating the forms, and where to get assistance to complete forms.

## PRF and PAF Rules

1. **PeopleFlow** will be used to process all PRF and PAF actions for Administrators, Faculty and Staff with the exception of a retro pay PAF. This PAF will remain paper based.
2. Students and Medical Residents will continue to use the paper based PAF process.
3. Most fields on the PRF and PAF must be completed in order for the forms to process to the next step. The system will validate the results against University policy and procedure as you complete the form.
4. While completing the PRF and PAF forms the system provides instructions and error messages to ensure correct data entry.
5. New Hire, Rehire and Transfer PRFs and PAFs cannot be back dated. Only future dates are permissible as effective dates.
6. A New Hire or a Rehire's first day of work will begin on a Friday in conjunction with their Orientation session.
7. All participants may add notes to a PRF or PAF. Notes remain with the PRF/PAF folder throughout processing.
8. All PRFs and PAFs must be initiated by the employee's home organization with exception of the One Time Payment and Transfer PAFs.
9. If attempting to process a PAF for a previously separated employee, first initiate a PRF and complete the hiring process (PRF and New Hire/Rehire PAF). After the hiring process has completed, initiate a subsequent PAF.
10. Only one status change (i.e. salary change, title change, etc.) may be performed per PAF.
11. If an Approver rejects a PRF or PAF, the folder will be returned to the initiator for corrections or deletion.
12. The automated system is designed to be used as a mechanism to virtually route paperwork through a prescribed approval process. Upon completion of a process, the folder will remain on your **Watch List** for 50 days.
13. PeopleFlow is not designed to be used for reporting.
14. The PRF attachment controls for Position Description and Justification are required for all Staff and Administration positions.
15. A PRF must be completed before a New Hire, Rehire, or Transfer PAF is initiated. The system will automatically populate a portion of the PAF based on the PRF entries.

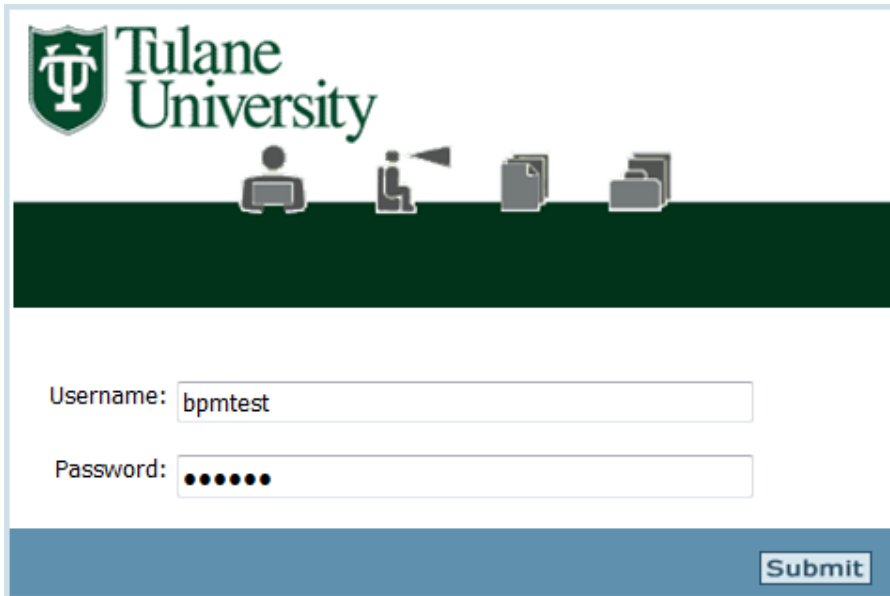
## PRF and PAF Rules (Continued...)

16. Salary will be validated against salary grade to ensure the minimum and maximum ranges are not exceeded.
17. Salary distribution accounts will be validated against the Chart of Accounts. If an account is not valid in the Chart of Accounts the form will not move forward.
18. Salary distributions must equal 100%.
19. Employees must successfully complete orientation and the orientation paperwork before a PAF will be forwarded to payroll for processing.
20. One time payments must include the account to be charged in the **Funding Distribution** section. Standard procedure when submitting a request for a one-time payment still applies.
21. Every PRF and PAF is assigned a **Folder Name**, (form type and number). The **Folder Name** will remain attached to the process until it is complete. Become familiar with this name since it is a key reference when contacting the Help Desk.

## Accessing, Logging In, and Navigating PeopleFlow:

1. Open an Internet Browser and go to: <http://bpm.tulane.edu>.
2. Create a desktop shortcut or bookmark the web address for future reference. No software installation is necessary to run PeopleFlow- simply go to this web address to gain access.

### Login Screen



The login screen displays the Tulane University logo and name. Below the logo is a dark green horizontal bar with icons representing a person at a computer, a person with a megaphone, a folder, and a briefcase. Underneath this bar are two input fields: 'Username:' with the text 'bpctest' and 'Password:' with six black dots. A blue 'Submit' button is located at the bottom right of the form area.

Figure 1: Login Screen

3. Enter your Tulane LDAP (e-mail) username & password
4. Click **Submit** or press enter on the keyboard

## The To Do List Page

By default, the initial screen upon logging into **PEOPLEFLOW** is the **To Do List**. Note the following indicators for this screen:

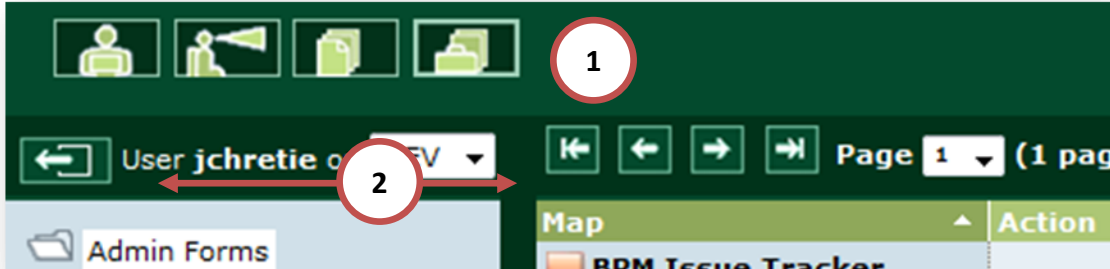





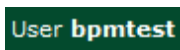



Figure 2: To Do List Screen

1. **The Action Icons:** The Action Icons are at the top of each screen. Placing the mouse pointer over the icon will give a small text box indicating the name/action of each of the four icons just below the icon symbol.

Action Icon	Icon Picture	Description
To Do List	 Person sitting behind a computer	Tasks created by you or sent to you by another user
Watch List	 Person watching for an action	View current task(s) in process
Blank Forms	 Multiple stack forms	Tasks that you can initiate in the system
Admin Forms	 Folder with forms behind it	Allows you to assign PRFs and/or PAFs to another user available on your list

2. **The Log Out Button, User name, and Page Navigational Buttons:**

Icon	Icon Picture	Description
Log Out Button	 Arrow pointing out of a box	It is important to properly log out of the system. DO NOT exit the system by pressing the 'X' icon at the top right hand corner of the web page.
User ID	 User Name	Information is recorded in the system and attached to this user id. Always verify that your individually assigned Tulane user id is displayed. Do not log in as another user or under other credentials.
Advance/Reverse the Page		Move through pages sequentially or jump to the first or last page.

## The To Do List Page, Continued

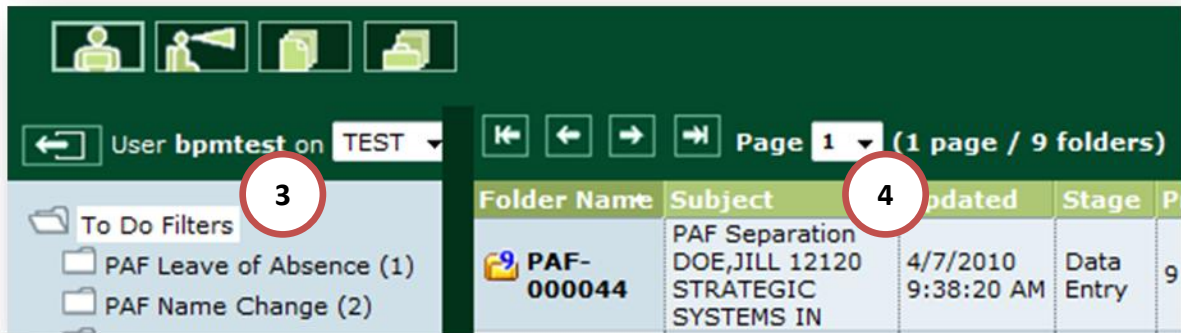


Figure 3: To Do Filter & Display Area

3. **To Do Filters:** An open folder highlighted in white is the **To Do Filter**. The numbers to the right of the folders indicate how many items are in each folder. The folders can be expanded to list all the forms currently in the process.
4. **Display Area:** Contains a list of all forms currently in your **To Do List**. This section can be extended to multiple pages. Advance or return a page by using the advance/reverse buttons on top of the list. Select an existing (PRF or PAF) in this list of items by placing the mouse pointer over the row, the item will highlight in white, click on the item one time to open and view the form in process. It also gives a snap shot of form status information such as:
  - a. form's folder name (form type and number)
  - b. date of last update
  - c. stage
  - d. messages

## Viewing a Form in Process

Select a form from the **To Do List** window to view the form details.

The form will open in a new browser window and it will contain four **Tabs** across the top:

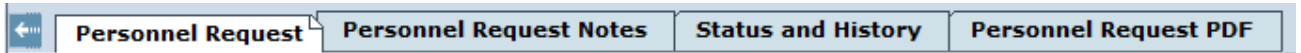


Figure 4: In-process Form Tabs

Process specific **Action Buttons** are listed at the bottom of each screen – see sample figures:



Figure 5: Form Action Buttons Section

Note the arrow at the left or right of each tab or button will allow you to scroll to more features only if they are available.



Figure 6: Action Buttons (continued...)

1. **Process Name:** the first tab indicating the process name or type: PRF (or PAF) – this is the default tab when you open an existing form in process.

The screenshot displays the Tulane University Personnel Request Form interface. It is divided into three main sections, each with a red circle and a number indicating its position:

- 1. Position Information:** This section includes fields for Position Ctrl #, Org Number (a dropdown menu), Job Class Code, PRF Incident, Request Date (set to 6/3/2010), Anticipated Start Date (mm/dd/yyyy), and Hiring Manager Username.
- 2. Funding Distribution:** This section shows 'Account(s) to be charged' and 'Total percent effort entered: 0.00'. It features a table with columns for GL Account, Natural Account, Task, Award, and % of Effort. The table is currently empty.
- 3. Attachments:** This section has a 'Choose Type' dropdown set to 'Position Description' and a 'Choose File' button. It also includes a table with columns for File Name, Type, and Size, which is currently empty.

Figure 7: PRF Tab Screen – Main Components

This window provides a view of:

1. All of the **Employee and Process related data** entered into the form
2. **Funding Distribution**
3. **Attachments**
4. Approval notifications thus far in the process

2. **Status and History:** the third tab displays the status and a historical snap shot of the form. It is a view of the current status in the workflow process as well as a view of the history involved with the specific form.

**Tulane University**

## Status and History

Folder Name: PRF-0002  
 Created by: bpmtest  
 Created on: 4/13/2010 12:07 PM

Currently at stage: Plus One  
 At stage since: 4/13/2010 12:10 PM  
 Last updated on: 4/27/2010 2:19 PM

On the To Do list of: jchretien  
 On the Watch list of: bpmtest

Page 1 of 1

Date Time	From Stage	Action Taken	Performed By	To Stage
4/13/2010 12:09 PM		Initiate PRF	bpmtest	Data Entry
4/13/2010 12:10 PM	Data Entry	Validate	bpmtest	Evaluate Approver
4/13/2010 12:10 PM	Evaluate Approver	Same Approver		Plus One
4/13/2010 12:11 PM	Plus One	Send Email		Plus One
4/27/2010 11:02 AM	Plus One	Rebuild Alert Lists		Plus One
4/27/2010 11:13 AM	Plus One	Rebuild Alert Lists		Plus One
4/27/2010 2:14 PM	Plus One	Rebuild Alert Lists		Plus One
4/27/2010 2:14 PM	Plus One	Rebuild Alert Lists		Plus One
4/27/2010 2:19 PM	Plus One	Rebuild Alert Lists		Plus One

Approve Add Notes Confer Reject Close

Figure 8: Status and History Tab

The Status and History screen provides the following information:

1. **Folder name:** PRF or PAF and the **folder name (form type and number)** number
2. **Created by:** lists Initiator user name
3. **Created on:** Date and time the folder was initiated
4. **Currently at stage:** indicates current step in process
5. **At stage since:** date and time the folder arrived at the current step
6. **Last Updated on:** when an action was last taken on the folder
7. On the **To Do List** of the listed users
8. On the **Watch List** of the listed users
9. The historical view of the form up until this moment.

3. **PRF (or PAF) Notes:** This section contains any (optional) notes/remarks submitted by the initiator and approver(s) in the workflow chain.



Figure 9: PRF Notes Tab



## Closing the form

To close the form and return to the **To Do List** click **Close** at the bottom right of the open window.



Figure 12: Action Button - Closing an open form

## System time-out

The system is set to allow **[10 minutes]** of inactivity before terminating the session. If the system times out while you are in a form, you will begin back at the **To Do List** page or system default page upon logging back into the system. Any data that has not been saved will be lost.

## Using Fields

### Data Fields

System forms contain data fields that consist of text boxes, list boxes, combo boxes, radio buttons, and check boxes. These data fields behave in exactly the same way as they do on other web-based forms.

### Required and Optional Fields

Fields are required unless explicitly marked 'optional'.

### Display-only Fields

Shaded fields on a form are read only and will be automatically populated. These fields cannot be modified by an initiator or approver.

## Fields needed to initiate/process PRFs

Following is a list of information items or PRF components that you will need to gather before you initiate a PRF. Please become familiar with the following field definitions and where to obtain the requested information to complete a task form in a timely manner.

### PRF (Personnel Request Form) fields' components

1. Position Control Number: A unique number assigned by the budget office to manage all positions.
2. Organization Number: This is the number assigned to your organization. Each organization has a unique number. If you cannot find the appropriate number on the WFMO website, (<http://www.tulane.edu/~wfmo/payroll/documents/OrganizationNumberNameExtract042908.xls>) please contact a WFMO representative at (504) 865-5280
3. Anticipated Start Date: This is the date the individual is expected to start work.
4. Job Class Code/Extent: This is a numeric code used in conjunction with each job. Each job in the University is assigned a particular number that corresponds with the position title. This number can be found on the WFMO website. The job code extent indicates whether the person is exposed to Blood Borne Pathogens and the number of hours worked per week. For example, if someone is an administrative secretary, full-time, 37.5 hrs per week with no exposure to pathogens the job class code and extent would be 304040-0001. That same secretary who works 40 hours a week with exposure to pathogens would be 304040-1722.
5. Pay Frequency: For certain Staff positions, you will be required to select whether the employees' pay period will be Monthly or Biweekly.
6. Actual Salary: The Annual Salary as modified by the Hours/Period. The Initiator must enter either the Actual Salary or the Hourly Rate. When the Actual Salary is entered, the Hourly Rate is automatically calculated. Note: For monthly employees who only work for 9 or 10 months per year, you still must take the desired monthly salary x 12 months as the payroll system does not differentiate between a 12 month and a 9/10 month employee.
7. Hourly Rate: This is the amount of money the employee will make per hour. The Initiator must enter either the Hourly Rate or the Actual Salary. When the Hourly Rate is entered, the Actual Salary is automatically calculated.
8. Hours per Period: This is the number of hours the employee will be working in a pay period. Full-time (100% FTE) Monthly employees work 162.5 hours for a 37.5 hour workweek. For Full-time Monthly employees who work a 40 hour workweek, the Hours/Period will be 173.33. Full-time Biweekly employees will have 75 hours (37.5 hr. workweek) or 80 hours (40 hr. workweek) per pay period. The appropriate full-time value is automatically populated when the Job Class Code and Pay Frequency fields are populated. If an employee is not full-time, (100% FTE) enter the hours the employee will work.
9. Funding Distribution: The account or accounts that the employee's salary and fringe benefits will be charged against.
  - a. **GL Account**: This is the general ledger account number or the Grants Management project number the employee's salary will be charged to.
  - b. **Natural Account**: This is the natural account number that corresponds to the employee's job code and status. The natural account numbers can be found on the

WFMO website. For example, an employee who is exempt will have a natural account number of 5311, non-exempt 5321, etc. (see <http://www.tulane.edu/~wfmo/payroll/TAMSnatural.html> for more information).

- c. **Task:** The number assigned to the grant. This information can be obtained from the Office of Research or Grants and Contracts Accounting.
  - d. **Award:** This is the award number assigned to the grant. This information can be obtained at the Office of Research or Grants and Contracts Accounting.
  - e. **Percent of Effort:** This is the percent of the employee's salary and fringe that will be charged to this particular account. Note: Even if a person is part-time, the percent of effort for the account number(s) must equal 100%.
10. Attachments: The Justification attachment is always required on a PRF. Staff and Administration positions also require a Position Description attachment. All other attachment types are optional.
11. Search Waiver Box: If you are requesting a search waiver please check this box.
12. Remarks Section: In this section you will enter any remarks pertinent to the process not previously covered on the PRF. For example, if the employee is going to be paid only through one-time pays, enter the amount to be paid along with the dates and account number the payments will be charged to.

## Fields needed to Initiate/Process PAFs

### PAF (Payroll Action Form) fields' components

1. Employee Number: When using the automated system, users will be prompted for the employee number. Tulane currently uses the Social Security Number as the employee number. Please verify the employee's social security number using a Social Security Card or other official document. The system will populate the rest of the employee information fields when you enter the employee number.
2. Check Code: This is the code used to indicate where you want the employee's pay advice will be delivered. It is usually the code that corresponds with the department's check code. However, the check code can be different because the employee is physically located in another department. Check Codes can be found on the WFMO website (<http://www.tulane.edu/~wfmo/payroll/documents/CheckCodes042908.xls>). If you cannot find your check code please call a WFMO representative for help at (504) 865-5280.
3. Hire Date: This is the date the employee actually starts work. Tulane policy requires all Staff and Administrative employees to start work on Fridays by attending orientation. They will start work in their respective departments on the following Monday. The hire date should be the Friday.
4. Org Number: This is the number assigned to your organization. Each organization has its own unique number. These numbers can be found on the WFMO website (<http://www.tulane.edu/~wfmo/payroll/documents/OrganizationNumberNameExtract042908.xls>). If you cannot find the appropriate number please call a WFMO representative at (504) 865-5280.
5. Effective Date of Action: The date the action you are performing on the PAF becomes effective. This is not the date you actually fill out the PAF but the date the action comes into effect. For example, a person's salary distribution is changing effective 7/1/03 but you are filling out the PAF on 8/15/03, the date to use is 7/1/03.
6. Job Change Code: Enter the reason you are changing the employee's job code and extent.
7. Job Class Code/Extent: This is a numeric code used in conjunction with each job. Each job in the University is assigned a particular number that corresponds with the position title. This number can be found on the WFMO website ([http://www.tulane.edu/~wfmo/payroll/documents/jobclasscodes110108\\_000.xls](http://www.tulane.edu/~wfmo/payroll/documents/jobclasscodes110108_000.xls)). The job code extent indicates whether the person is exposed to Blood Borne Pathogens and the number of hours worked per week. For example, someone is an administrative secretary, full-time, 37.5 hrs per week with no exposure to pathogens. The job class code and extent would be 304040-0001. That same secretary who works 40 hours a week with exposure to pathogens would be 304040-1722.
8. Activity Change Code: Please select the appropriate reason for the activity change. These codes will appear in a dialog drop down box when you click on the activity change code box.
9. Activity Code: This field describes the action you are taking on the PAF. The activity codes can be found on the WFMO website

(<http://www.tulane.edu/~wfmo/payroll/documents/ActivityCodes042908.xls>). For example, you are hiring a new employee who is going to be permanent and will work full-time, the code will be new hire-RF (regular full-time.) If the new employee will only work part-time for a few months, then the code will be new hire-TP (temporary part-time.)

10. Actual Salary: The Annual Salary as modified by the Hours/Period. The Initiator must enter either the Actual Salary or the Hourly Rate. When the Actual Salary is entered, the Hourly Rate is automatically calculated. Note: For monthly employees who only work for 9 or 10 months per year, you still must take the desired monthly salary x 12 months as the payroll system does not differentiate between a 12 month and a 9/10 month employee.
11. Hourly Rate: This is the amount of money the employee will make per hour. The Initiator must enter either the Hourly Rate or the Actual Salary. When the Hourly Rate is entered, the Actual Salary is automatically calculated.
12. Hours per Period: This is the number of hours the employee will be working in a pay period. Full-time (100% FTE) Monthly employees work 162.5 hours for a 37.5 hour workweek. For Full-time Monthly employees who work a 40 hour workweek, the Hours/Period will be 173.33. Full-time Biweekly employees will have 75 hours (37.5 hr. workweek) or 80 hours (40 hr. workweek) per pay period. The appropriate full-time value is automatically populated when the Job Class Code and Pay Frequency fields are populated. If an employee is not full-time, (100% FTE) enter the hours the employee will work.
13. % of Full-time: This field states the percent of time the employee will work. If the individual is full-time the percentage will be 100%. The following is a list percentages relative to employment status:
  - a. Regular Full-time-RF-100%
  - b. Part-time with Benefits-RB-50-99%
  - c. Permanent Part-time-RP-1-49%
  - d. Temporary Full-Time-TF-100%
  - e. Temporary Part-time-TP-1-99%
14. Termination Date: This is the date of the individual's last day of employment.
15. Pd. Vacation Hrs: The department should enter the number of hours the employee shows on the latest time control listing. This field is used to let WFMO know how many vacation hours to pay an individual who is terminating. If there are any changes to be made to the hours, it will be WFMO's responsibility to make the changes.
16. Leave Type: This field refers to the type of leave the employee is on, whether it is personal, family medical leave and paid or unpaid leave. The codes for the particular leaves must correspond with the type of leave in the activity code box. The codes can be found on the WFMO website.
17. LOA Begin Date: This is the date the employee actually will start their leave of absence. This must match the effective date of action.
18. LOA Return: This is the date the employee will return to work. **\*\*Note-you must still complete a separate PAF returning the employee from leave of absence. A PAF must be done to return the employee to duty and to start paying them again if they were on leave without pay.**
19. Funding Distribution: The account or accounts that the employee's salary and fringe benefits will be charged against.

- a. **GL Account:** This is the general ledger account number or the Grants Management project number the employee's salary will be charged to.
  - b. **Natural Account:** This is the natural account number that corresponds to the employee's job code and status. The natural account numbers can be found on the WFMO website. For example, an employee who is exempt will have a natural account number of 5311, non-exempt 5321, etc. (see <http://www.tulane.edu/~wfmo/payroll/TAMSnatural.html> for more information).
  - c. **Task:** The number assigned to the grant. This information can be obtained from the Office of Research or Grants and Contracts Accounting.
  - d. **Award:** This is the award number assigned to the grant. This information can be obtained at the Office of Research or Grants and Contracts Accounting.
  - e. **Percent of Effort:** This is the percent of the employee's salary and fringe that will be charged to this particular account. Note: Even if a person is part-time, the percent of effort for the account number(s) must equal 100%.
20. **Remarks Section:** In this section you will place any special instructions not previously covered on the PAF. For example, if the PAF is for a one-time pay, then you will enter the amount you want to be paid and the account you want charged for that one time pay.
21. **Department Approvals:** This is the section that is to be signed by the person responsible for the PAF. It will also have to be signed by the plus one approver, the Budget Office/Office of Research, and the Senior Officer that the department reports to.

## PeopleFlow APPROVAL MATRIX

PeopleFlow Folder Type	Initiator	Department Head Approval	Plus One Approval	Budget Office	Office of Research	Senior Officer	Contingency Approval	ESS	HR Review	Compensation Review	Employment	Orientation	Payroll
PAF - Leave of Absence	•	•	•						•				•
PAF - Employee Name Change	•	•	•						•				•
PAF - One Time Payment	•	•	•	•	5* & 6* GL's	>500				•			•
PAF - Salary Change	•	•	•	•	5* & 6* GL's	•				•			•
PAF - Salary Distribution Change	•	•	•	•	5* & 6* GL's	>Salary				•			•
PAF - Separation	•	•	•					•	•				•
PAF - Status Change	•	•	•	•	5* & 6* GL's	•				•			•
PAF - Title Change	•	•	•	•	5* & 6* GL's	•				•			•
PRF	•	•	•	•	5* & 6* GL's	•	•			•	• Holds until Hire complete in TulaneJobs, then PAF released to Initiator for completion		
PAF - New Hire/Rehire (Employment releases upon PRF completion)	•	•	•							•		•	•
PAF - Transfer (Employment releases upon PRF completion)	•	•	•							•			•

PRF - Personnel Request Form

PAF - Payroll Action Form

## Glossary of Terms

Client: The web-based workspace where all processes are started and managed.

Department Approval: The person directly responsible for all PRF and PAF actions for an organization.

Discretionary Payments: One time payments made to an employee based on the discretion of the employee's organization (i.e. bonus).

Incident: A unique PRF or PAF process from start to finish.

Incident Number: A numeric value assigned by the system to identify each unique PRF and PAF process.

Initiator: The person selected by each organization to create a PRF and/or PAF.

Non-Discretionary Payments: One-time payment made to an employee based on contractual obligation (i.e. moving expenses, retirement supplement, etc.).

Organization: The Tulane defined terminology for department.

PAF (Payroll Action Form): The form to be used when processing all types of employee activity other than the retro only PAF.

Plus One: The person ultimately fiscally responsible for all PRF and PAF actions for an organization.

PRF (Personnel Request Form): The form to be used when hiring Administrators, Faculty and Staff employees. The PRF replaces the SPR (Staff Personnel Request form).

Status Change: A change in an employee's benefit status (i.e. from regular full-time to part-time with benefits) This action will change the Actual Salary if there is an increase or decrease in hours worked.

Task: A piece of work that has been assigned.

Title Change: A change in an employee's title without a change in salary.

Transfer: A change in an employee's organization. This action might include a change in title and salary.

PeopleFlow: The software system supporting the automated PRF and PAF processes.