



## **Workforce Management Organization**

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

### **Module 13 – Steps to Approve PRFs / PAFs**

VERSION: 4.0

July 19, 2010

(ALL SCREEN SHOTS SUBJECT TO CHANGE)

## PEOPLEFLOW: Approving a PRF/PAF task process for Department Heads, Plus Ones, and Sr. Officers

**SPECIAL NOTE:** As a general practice steps involved in approving a PeopleFlow PRF and PAF follow the same pattern (any exceptions, will be indicated in this section).

### Steps to approve PRFs and/or PAFs

1. Once the designated person (**PRF/PAF Initiator**) in your department or work unit completes and submits the applicable automated form, you will receive an e-mail notification of a new action item.
2. Log in to the **PeopleFlow** system
3. Click the **To Do List** icon



Figure 1: To Do List Action Icon

4. Note the **To Do Filters** on the left panel of the screen – items pending your review will be indicated in each applicable subfolder by form type, with the number of forms shown in parenthesis. In Figure 1 there are 4 New Hire PAFs, 1 Salary Distribution Change PAF, and 3 PRFs.
5. Notice the headings across the top (Folder name, Subject, Updated, Stage, Priority, Deadline, and Message) this information will provide you with a quick snap shot of a PRFs/PAFs current status.
6. To illustrate the approver's steps we will focus on **PRF- 000430** throughout this section (see figure 2).



Figure 2: To Do List Screen

7. Click the Folder Name of the appropriate form to be reviewed

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8. Once the form opens, review/navigate the form, and notice the sub-tabs across the top: **PRF, Status and History and PRF Notes** to assist you during the review of the form. More about these tabs latter in this section. (See figure 3)

9. Note the information available at a glance for this PRF:

- PRF incident Number
- Position Control Number
- Requested Date
- Organization number and name
- Anticipated Start Date
- Job Class Code and Position Title
- Position Type
- Pay Frequency
- Hiring Manager / contact information
- Hiring Assistant/ contact information
- Search waiver information
- Annual Salary
- Actual Salary
- Monthly Salary
- Percent FTE
- Hourly Rate
- Hours/Period

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The screenshot shows the 'Personnel Request Form' interface. At the top, there are four tabs: 'Personnel Request', 'Personnel Request Notes', 'Status and History', and 'Personnel Request PDF'. The Tulane University logo is on the left, and the title 'Personnel Request Form' is in green. The form is divided into sections: 'Position Information' with fields for Position Ctrl # (12345678\*), Org Number (12120), Job Class Code (309130-1721), Position Type (New Position), Position Duration (Regular), and Search waiver (Yes/No). On the right, there are fields for PRF Incident (PRF-000430), Request Date (5/20/2010), and Anticipated Start Date (5/21/2010). Below these are fields for Hiring Manager (bhirons, Hiron, Budd A) and Hiring Assistant (jchretien, Chretien, Jason E). At the bottom, there is a table with columns for Annualized Salary, Actual Salary, Monthly Salary, Percent FTE (100.00), Hourly Rate, and Hours/Period (173.33).

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Figure 3: Top view of sample PRF

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10. Note the **Funding Distribution, Remarks, and Attachments** added to support the request. Also notice the action buttons at the bottom of the PRF page: **Approve, Add Notes, Confer, Reject, Release Ownership, and Close** (see figure 4 and table 1 for summary explanation of each button)

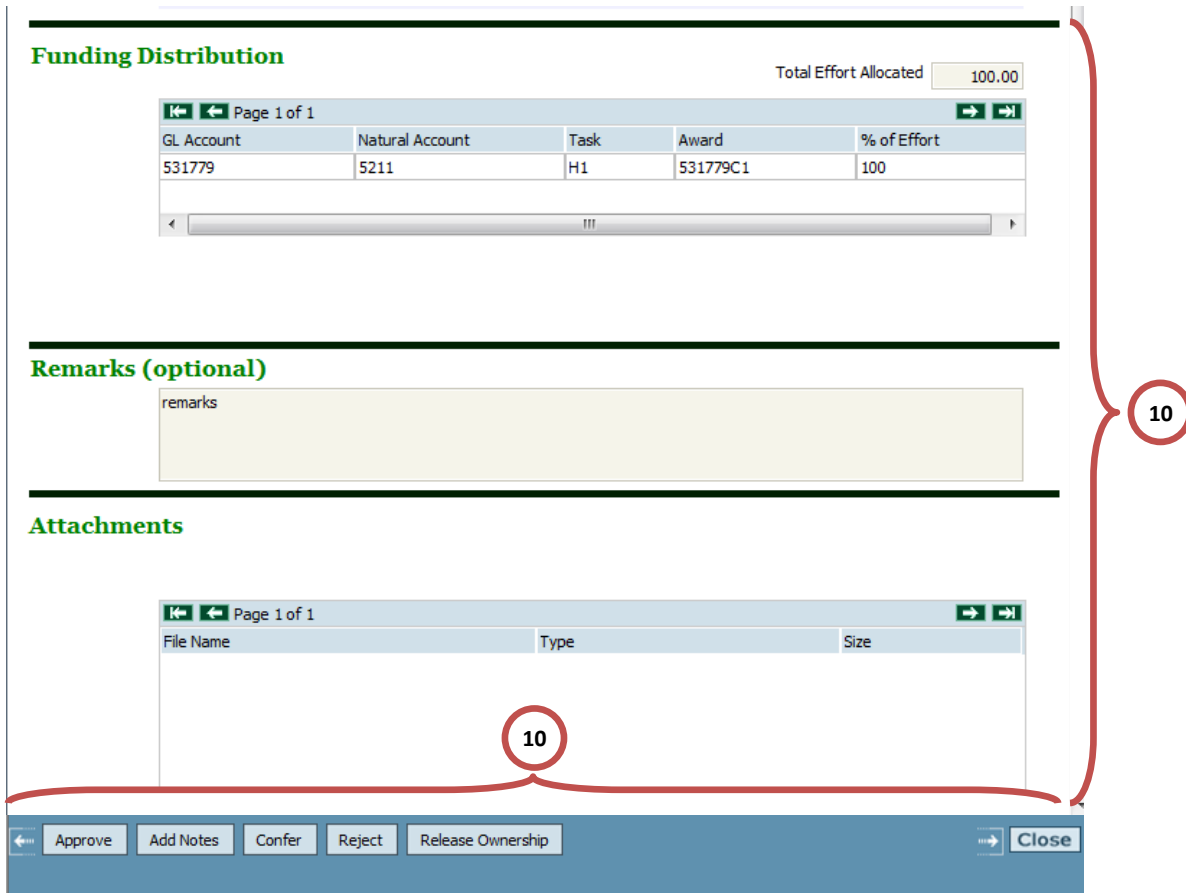


Figure 4: Middle and bottom view of sample PRF

Summary of the action buttons available:

Action Button	Resulting Action
<b>Approve</b>	Moves form to next approver.
<b>Add Notes</b>	Allows user to add remarks, memos, and notes to the form for next approvers to see.
<b>Confer</b>	Allows user to consult or discuss form with another user in the process flow.
<b>Reject</b>	Returns form to designate PRF/PAF initiator.
<b>Release Ownership</b>	Release the ownership of the current folder. Only available after the “Take Ownership” action is taken.
<b>Close</b>	Closes form and return user to the ‘To Do List’ screen.

Table 1: List of available actions to assist in reviewing PRFs and PAFs

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11. Every time you click on a button, the system will ask you to confirm your action as a safety feature (see figure 5).

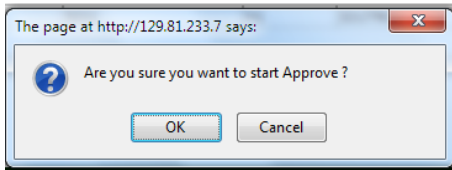


Figure 5: Confirmation dialog box

12. Click on the **Status and History** tab to review more details of the form's current status in the process (see figure 6).

13. Note the status information on the **first section** of screen:

- Folder Name: PRF Name (PRF number)
- Created by – user that initiated form
- Created on – date
- Currently at stage: this refers to your role step
- At stage since: date and time
- Last updated on : date and time
- Currently on the To Do List of: this refers to your role step
- On the Watch list of: List of users that have already worked this form

14. Note the history information on the **second section** of screen:

- Date and time
- From stage
- Action taken
- To stage
- Performed by

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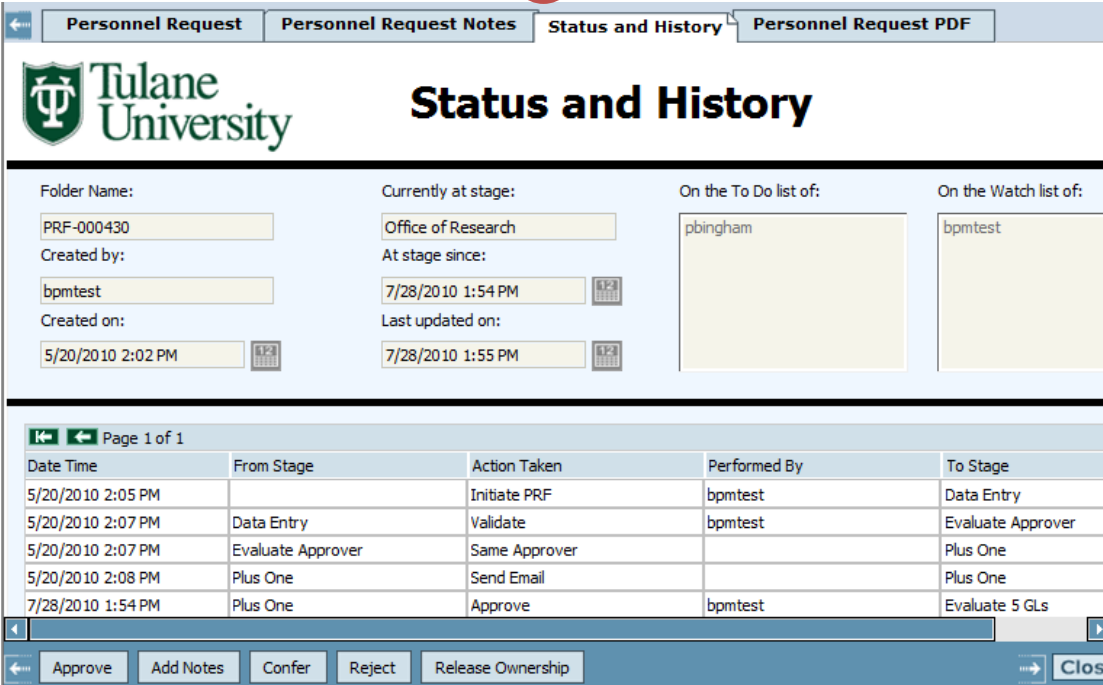
A screenshot of the "Status and History" tab in a web application. The page title is "Status and History" and it features the Tulane University logo. The main content area is divided into two sections. The first section, labeled "13", contains status information for a folder named "PRF-000430", created by "bpmtest" on "5/20/2010 2:02 PM". It shows the current stage as "Office of Research" since "7/28/2010 1:54 PM", last updated on "7/28/2010 1:55 PM". It also lists users on the "To Do list" (pbingham) and "Watch list" (bpmtest). The second section, labeled "14", is a table with 5 columns: "Date Time", "From Stage", "Action Taken", "Performed By", and "To Stage". It shows a history of actions from 5/20/2010 2:05 PM to 7/28/2010 1:54 PM. At the bottom, there are navigation buttons: "Approve", "Add Notes", "Confer", "Reject", "Release Ownership", and "Close".

Figure 6: Status and History Tab

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15. Click on the **PRF Notes** tab, to review any notes entered by previous users regarding the form (see figure 7).
16. Click on **Add Notes** to add remarks, memos, and notes to the form for the next approvers (or initiator, in case you reject the form) to review (see figure 7).

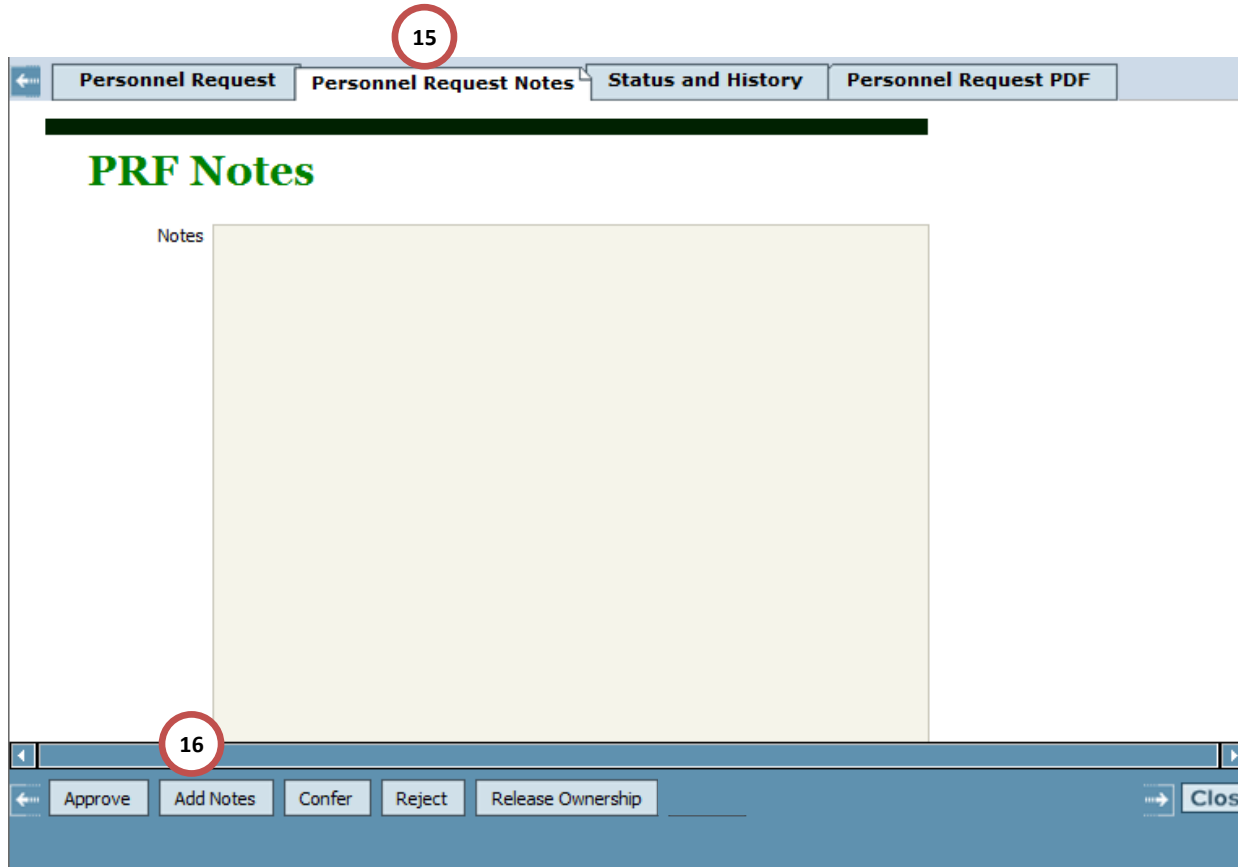


Figure 7: Notes Tab

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17. Click the **PRF** tab at the top of the screen to return to the PRF view (see figure 8).

Figure 8: PRF bottom view

18. Click on **Approve**, confirmation dialog box will open:

19. Click **OK** to move form to the next approver in the process.

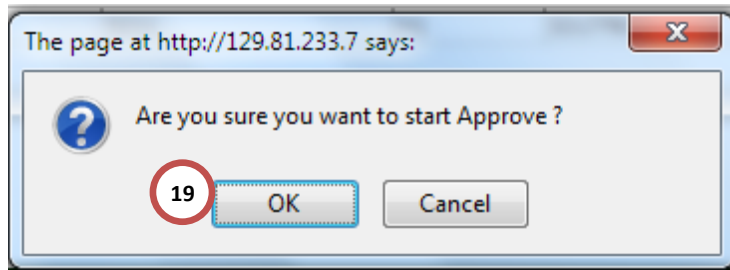


Figure 9: Confirmation dialog box

20. To **Reject** a PRF/PAF, click the Reject button at the bottom of the page.

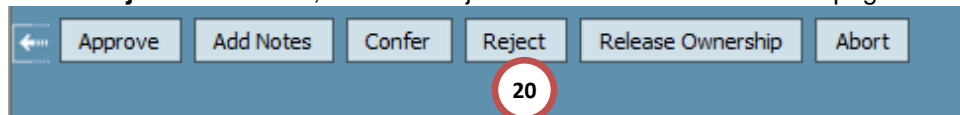


Figure 10: Actions at the bottom of an open folder

**End of Approvers' steps to move folder forward in the process**

