

Workforce Management Organization

PeopleFlow Automated PRF and PAF Processing System

Module 15 – System Functional Tools Part 2

VERSION: 4.0

July 19, 2010

Conferring, Validating and Submitting Forms

When reviewing a form you are able to **Confer** with another user regarding the PRF/PAF action being initiated and/or processed. This allows the user to Confer during the process as opposed to stopping the action and having to initiate a new form for the same action to be processed.

1. After saving the form, the form reloads – the form will open up for an opportunity to confer (discuss) your entries with another user in your list (see figure 9). This is not a required action.
2. Click **Confer**

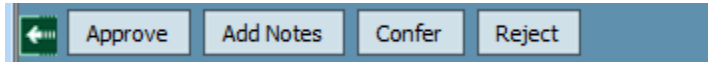


Figure 9: Title Change PAF - Confer Action Button

3. Follow the instructions on the Confer Screen – to set up new conferrals (see figure 10) or remove currently conferred users (see figure 11)
4. Enter the user id of the user you wish to confer with in the **Conferral Name Search** text box, click **Go**, to search for user
5. Users name will appear in the **Available to Confer** box (See figure 10)
6. Click **Confer** action button to begin conferring with the selected user
7. You must click the **Confirm Pending Changes** button to complete any pending updates

Figure 10: Confer with other users - Set up New Conferrals

Steps continue on following page...

8. To remove a completed conferral, in the Currently Conferring box, click on the **users id** then click the **Remove** action button to move the user to the Pending Removal box (See figure 11)
9. To finalize all changes, select the **Confirm Pending Changes** action button as illustrated in figure 11.

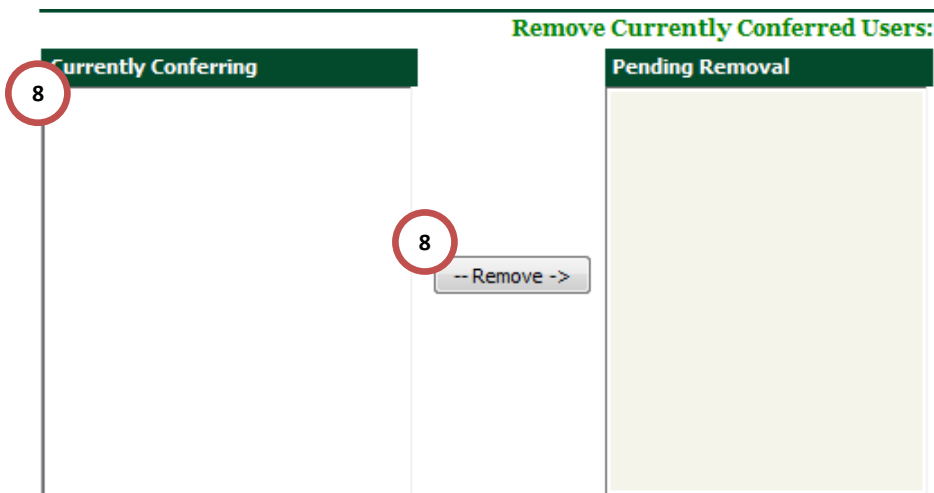


Figure 11: Confer with other users - Remove Currently Conferred Users

10. After conferring the form (if applicable) the form will reload to the initial data entry page (see figure 12)
11. Click **Validate** – to ensure that all data is entered accurately in accordance with system rules



Figure 12: Title Change - Data Entry screen

12. Click on **Submit** a second time – to move PAF forward in the process (See figure 13)



Figure 13: Title Change - Submit to move the form forward in the process



List of PRF/PAF Functional Buttons

Action Button	Resulting Action
Approve	Moves form to next approver.
Reject	Returns form to designate PRF/PAF initiator.
Abort	Deletes form in the system.
Confer	Allows user to consult or discuss form with another user in the process flow.
Edit	Allows user to make editions or changes to the form in review/process.
Validate	To ensure that all data is entered accurately in accordance with system rules.
Take Ownership	When a form is available to a group of users, this action allows for one user to assume the lead role as reviewer.
Release Ownership	When a user has ownership of a folder, this action allows that user to release ownership.
Print	Allows user to obtain a print out of opened screen.
Add Notes	Allows user to add remarks, memos, and notes to the form for next approvers to see.
Close	Closes form and return user to the 'To Do List' screen.

Table 3: List of available actions to assist in reviewing PRFs and PAFs

Navigating Admin Forms

The Admin Forms screen allow users to assign, re-assign, retract active PRFs and PAFs forms with other PeopleFlow users in your department or work unit.

Steps to Assign PRFs and PAFs to another user

1. Upon login the **To Do List** appears on the screen – which is the default screen in PeopleFlow.



Figure 20: To Do List Action Icon

2. Point and click to the **Admin Forms** icon.



Figure 21: Admin Forms Icon

3. The **Admin Forms** screen will open. Note the **To Do Filters** on the left panel of the screen – indicating the number of system features available to you.
4. Notice the headings across the top (**Map, Action, Description**) this information will provide you a quick snap shot of the feature - more features will be available in the future.
5. Select **Folder Reassignment** to open the screen (see figures 23 and 24 on next page).

A screenshot of the Admin Forms screen. The top navigation bar shows the user 'jchretien on DEV' and 'Page 1 (1 page / 7 forms)'. The left sidebar has 'Admin Forms Forms (7)' highlighted with a red circle labeled '3'. The main table has columns 'Map', 'Action', and 'Description'. The 'Folder Reassignment' row is highlighted with a red circle labeled '5'. A red circle labeled '4' points to the 'Page 1' dropdown. The table content is as follows:

Map	Action	Description
BPM Issue Tracker Admin Forms	Create Issue Tracker Report	Issue tracker Report
Folder Reassignment	Folder Reassignment	
Test Forms	Proper Case	
Tulane System Management	Folder Reassignment	
WFMO Admin Forms	WFMO Folder Reassignment	
WFMO Worksheets	Employee Number	
WFMO Worksheets	Salary Calculations	

Figure 22: Admin Forms Screen

Steps continue on following page...

6. The **Folder Reassignment** screen allows you to assign your current and/or future forms in case you are going to be out of the office (vacation, sick leave, etc...).
7. For illustration purposes we have divided the screen view in three sections:
 - Reassign Current Folders view (figure 23)
 - Current Reassignments view (figure 24)
 - Reassign Future Folders view (figure 25)
8. In the **Reassign Current Folders view**, note the column headings across the top, **User, Folder, Subject, Map, Stage, and Message** to assist you during the selection and reassignment of forms.
9. You may choose to select an individual form by pointing and clicking on the applicable folder (i.e. Folder PAF – 0042 used in the example);
10. The chosen item appears in the **Selected Folder** field. Pressing the **X** box will 'de-select' the chosen item.
11. You may also select all active forms in your to do list by clicking on **Select All Folders from** button.

Folder Reassignment

Reassign Current Folders:

11 Select a folder to reassign or

Select All Folders from

10 Selected Folder

BPMIssue-0198 X

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8 User	Folder	Subject	Map	Stage	Message
9 jchretien	BPMIssue-0198	New Issue: One Time Payment in PAF, Type: Failed to Refresh Form, Severity: Low	BPM Issue Tracker	Assigned Developer	Further information
jchretien	BPMIssue-0107	missing Employee Support in routing (Separation, Type: Other, Severity: High)	BPM Issue Tracker	Rejected Issue	Issue cancelled by
jchretien	BPMIssue-0193	make sure new middle name field transfers to PAF New Hire (PRF Add Candidate, Type: Required Field Validation, Severity: Medium)	BPM Issue Tracker	Rejected Issue	Issue cancelled by
jchretien	PAF-000021	PAF Leave of Absence DOE,JILL 12120 STRATEGIC SYSTEMS IN	PAF Leave of Absence	Data Entry	Leave of Absence

Figure 21: Reassign Current Folders - Screen

Steps continue on following page...

12. Under the **Current Reassignments** section – enter the user id of the desired person. This will be the first part of the user’s Tulane e-mail address. If you do not know the user id enter in the last name.
 .in the **Reassignment Name Search** box, click **Go**
13. The User id will appear in the **Reassign to user** box.
14. Click the **Reassign** button, and user will appear under the **Current Reassignments** field (see figure 24).
15. Click the **Close** button to exit the Folder Reassignment screen.



The screenshot shows a web interface for managing reassignments. At the top right, there is a blue bar with a 'Close' button, circled with a red '15'. Below this, the main interface is divided into two sections. The first section, 'Reassignment Name Search', contains a text input field circled with a red '13' and a 'Go ->' button. To its right is another text input field circled with a red '14' and a 'Reassign' button. The second section, 'Current Reassignments', features a table with a header row containing 'Folder', 'Original User', 'Reassigned To', and 'Stage'. A red '12' is placed over the 'Folder' header. Above the table, there are navigation arrows and the text 'Page 1 of 1'.


Figure 22: Current Reassignments- Screen

Steps continue on following page...

16. At the **Reassign Future Folders** section – enter beginning date by using the built-in calendar under **Reassignment Begin Date** and the end date by entering the applicable **Reassignment End Date**.
17. Enter the user id of the desired person. This will be the first part of the user's Tulane e-mail address. If you don't know the user id enter in the last name in the **Reassignment Name Search** box, click on **Go** button.
18. The User id will appear in the **Reassign to user** box.
19. Click the **Reassign** button,
20. User will appear in the **Future Reassignments** window at the right hand side of screen (see figure 25).

Reassign Future Folders:

16 { Reassignment Begin Date  

17 Reassignment End Date 

17 Reassignment Name Search

18 Reassign to user

19

Future Reassignments

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Reassigned To	From	To
cgfisher	6/2/2010	6/17/2010

Figure 23: Reassign Future Folders - Screen

End of System Functional Tools Module Part 1

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