



## **Workforce Management Organization**

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

## **Module 2 – Steps to Initiate PRFs**

VERSION: 4.0

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(ALL SCREEN SHOTS SUBJECT TO CHANGE)

## PeopleFlow: Initiating a PRF task process

Upon login the **To Do List** appears on the screen. From this screen you are ready to initiate any of the forms which are assigned to your user role.

1. Click the **Blank Forms** action icon:



Figure 1: Blank Forms Action Icon

2. Note: once the page opens notice that the **Blank Forms** icon is highlighted, and also the navigation panel on the left hand side reads **Blank Forms Filter**: indicating that you are at the current page to initiate a PRF (or PAF).

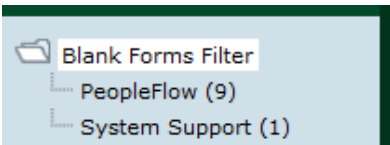


Figure 2: Blank Forms Filter

3. Click once on **Personnel Request Form** from the list of available forms– Notice that the forms are listed alphabetically).

Map	Action	Description
BPM Issue Tracker	Initiate Issue	
PAF Leave of Absence	Leave of Absence	Initiate a ne
PAF Name Change	Name Change	Initiate a ne
PAF One Time Payment	One Time Payment	Initiate a ne
PAF Salary Change	Salary Change	Initiate a ne
PAF Salary Distribution Change	Salary Distribution Change	Initiate a ne
PAF Separation	Separation	Initiate a ne
PAF Status Change	Status Change	Initiate a ne
PAF Title Change	Title Change	Initiate a ne
PRF Personnel Request	Initiate PRF	Initiate a ne

Figure 3: List of Available forms

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4. A new blank PRF will open

Please note:

- The **Tab** key on the keyboard will move the cursor sequentially through the fields in the PRF form
- **Shift + Tab** will move the cursor back one field at a time
- An asterisk (\*) next to a field indicates a required data entry point

**Tulane University** **Personnel Request Form**

**Position Information**

Position Ctrl #  PRF Incident  1

Org Number  3 Request Date  12

Job Class Code  4 Anticipated Start Date (mm/dd/yyyy)  8

Position Type  5

Position Duration  6

Search waiver will be requested  Yes  No 7

Hiring Manager Username  9 Phone

Hiring Assistant Username  10 Phone

Pay Frequency  11

Annualized Salary	Actual Salary	Monthly Salary	Percent FTE	Hourly Rate	Hours/Period
\$0.00 12	\$0.00	\$0.00	0.00	\$0.0000	0.00

Figure 4: PRF Screen – Top Section

1. Make a note of the unique PRF **folder name (form type and number)** given automatically by the system to each new form: this **folder name (form type and number)** becomes an identifier to locate the PRF throughout the workflow process.
2. **Position Control Number**
3. **Org Number:** Select the proper organization number from the drop down menu. Once you have selected the proper organization number the name automatically populates into the description field.
4. **Job Class Code:** Enter the job class code and extent. The position title populates the appropriate field.
5. **Position Type:** Use the drop down menu to select *New Position* or *Replacement Position*.
6. **Position Duration:** Use the drop down menu to select *Regular* or *Temporary*.
7. **Search Waiver Requested**
8. **Anticipated Start Date:** Using the built-in calendar, select the anticipated start date. Once selected, the field will automatically populate the selected date. This date must be a Friday.

**Steps continue on following page –**

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9. **Hiring Manager:**

- Enter the name
- Full email address (including @tulane.edu)
- Telephone number

10. **Hiring Assistant:**

- Enter the name
- Telephone number

11. **Pay Frequency:** Use the drop down menu to select *Bi-monthly* or *Monthly*.

Note: once you enter the Job Class Code and Pay Frequency the Hours/Period field defaults to 100% full time effort (FTE).

12. **Actual Salary:** Enter the Actual Salary amount in the designated field, or enter the hourly rate. This action will automatically populate all other fields in this row.

*Note: remember the hours/period will be automatically populated once the job class code and pay frequency are entered.*

***Steps continue on following page –***

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## Funding Distribution

### Funding Distribution

Total Effort Allocated **3** 0.00

GL Account	Natural Account	Task	Award	% of Effort
				0.00

**1** Add Cancel

**2** GL Account Natural Account Task Award % of Effort

**4** Remarks (optional)

Figure 5: PRF – Middle Section

1. Click **New** (not pictured) to add each funding account.
2. Enter the following:
  - GL Account
  - Natural Account
  - Task Number
  - Award Number
  - Percent of EffortClick **Add**  
Add additional rows as needed using the **New** and **Add** buttons.  
Make sure that all funding distribution adds up to 100% FTE. See the **% of Effort** entered window at far right corner of this section.
3. Funding distribution for all positions must be equal to 100%
4. Notice the **Remarks**

**Steps continue on following page –**

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## Attachments

If needed, attachments can now be added to the PRF.

The screenshot shows the 'Attachments' section of a PRF form. At the top, there is a dropdown menu labeled 'Choose Type' with 'Position Description' selected. To its right is a 'Choose File' button with a green clipboard icon. Further right is a 'Save Attachment' button. Below these elements is a table with three columns: 'File Name', 'Type', and 'Size'. At the bottom right of the form, there are 'Cancel' and 'Submit' buttons. Red circles with numbers 1, 2, and 3 highlight the dropdown menu, the 'Choose File' button, and the 'Submit' button, respectively.

Figure 6: PRF - Bottom Section

1. **Choose Attachment Type:** Use the drop down box to select the proper attachment type:
  - Job Description
  - Position Justification
  - Organization Chart
2. **Choose File:** Click the green clipboard icon to bring up the **Browse** window. Locate the file on your computer and select the document to be attached. Click **Upload** to attach it to the PRF.

*Note: You will be able to open the attachment once loaded in the PRF to review it.*

3. **Save Attachment:** Click the button to save the attachment to the PRF.
4. Take a moment to review the entire PRF and click **Submit** to send the form to the next level up approver

The approver will receive an e-mail stating that a PRF is pending in their **To Do List** for review and approval.

Remember PRF/PAF progress can be checked by clicking the **Watch List** action icon from the main **PeopleFlow** page.



Figure 7: Watch List Action Icon

**End of PRF Initiator steps**

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