

Approval Workflow for Human Resources Transactions on My HUB

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March 2013

Current HR transactions include: Create (and Post) a Position, Edit (and Post) a Position; Create a Requisition; Edit a Requisition; Pay Rate Changes (Acting Pay); and ePerformance/Merit Transactions.

Submitting Transactions

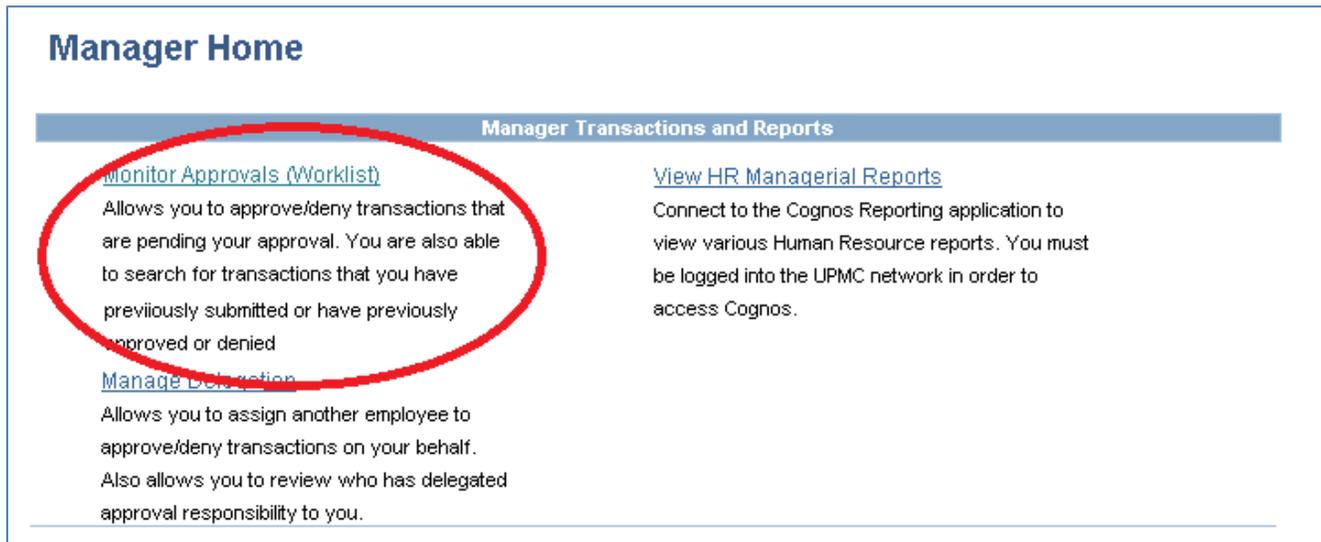
Although the way in which transactions are approved will be changing, the way in which transactions are submitted will not change. The navigation and forms will remain the same. Help links are available on the submission pages to assist in walking through submitting a transaction.

Approval Paths

The individuals who need to approve specific transactions will not change. The paths are defined by department. Please contact Human Resources for questions or concerns regarding an approval path. Note: Edit a Position transactions that request a department change will follow the new department's approval path.

Viewing Transactions

The navigation for viewing transactions, once they have been submitted, will be different. Instead of clicking on Worklist or Transactions Submitted on the manager homepage, click on the new Monitor Approvals (Worklist) link to see submitted transactions, transactions pending your approval, and transactions that you have already approved.



The screenshot displays the 'Manager Home' interface. At the top, there is a blue header bar with the text 'Manager Transactions and Reports'. Below this, there are three main sections. The first section, 'Monitor Approvals (Worklist)', is circled in red and contains the text: 'Allows you to approve/deny transactions that are pending your approval. You are also able to search for transactions that you have previously submitted or have previously approved or denied'. The second section, 'View HR Managerial Reports', contains the text: 'Connect to the Cognos Reporting application to view various Human Resource reports. You must be logged into the UPMC network in order to access Cognos.'. The third section, 'Manage Delegation', contains the text: 'Allows you to assign another employee to approve/deny transactions on your behalf. Also allows you to review who has delegated approval responsibility to you.'

Current HR transactions include: Create (and Post) a Position, Edit (and Post) a Position; Create a Requisition; Edit a Requisition; Pay Rate Changes (Acting Pay); and ePerformance/Merit Transactions.

Viewing Transactions (continued)

By default, transactions that are pending your approval will display.

Like transactions are grouped for ease of viewing. Click on the column header within the transaction grouping to sort by that column.

Monitor Approvals

By default, the listing below (under Search Results) will display any transactions that are pending your approval. Update the search criteria and click Search to view transactions that you have previously submitted, approved, or denied.

Transactions of the same type are grouped together. Click on a column header within the transaction grouping to sort the transactions by that column. Click on a transaction to view the details and approve or deny if the transaction is pending your approval.

You can also approve or deny transaction(s) that are pending your approval directly from this page by checking the box to the left of each transaction, entering comments as necessary, and then clicking either Approve Selected or Deny Selected

Search Criteria

Current Role:

Approver Status:

User Actions

Comment:

Search Results

[Select All](#) [Deselect All](#)

Approval Process: Pay Rate Change Low Risk

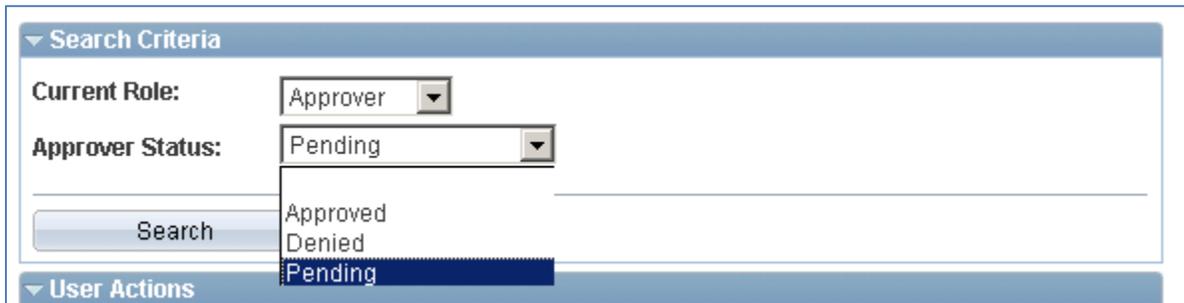
		Status	Transaction Number	Effective Date	Title	Empl ID	Employee Name	Hourly Rate	New Hourly Rate	Change Percent	Begin Date/	End Date
1	<input type="checkbox"/>	Pending	191050	2013-03-10	[REDACTED]	6	2013-03-10	2013-03-23				
2	<input type="checkbox"/>	Pending	191053	2013-03-10	[REDACTED]	5	2013-03-10	2013-03-23				

Note: Transactions that were submitted prior to April 27, 2013 and were pending your approval have been denied in order to transition to the new process. Those transactions will need to be resubmitted by the requesting manager.

Current HR transactions include: Create (and Post) a Position, Edit (and Post) a Position; Create a Requisition; Edit a Requisition; Pay Rate Changes (Acting Pay); and ePerformance/Merit Transactions.

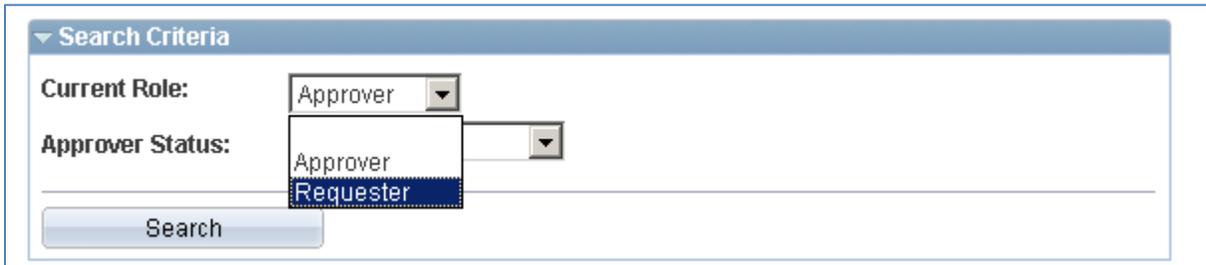
Viewing Transactions (continued)

To view transactions that you have previously approved or denied, update the Approver Status dropdown and click Search.



The screenshot shows a 'Search Criteria' panel with two dropdown menus. The 'Current Role' dropdown is set to 'Approver'. The 'Approver Status' dropdown is open, showing a list of options: 'Approved', 'Denied', and 'Pending'. The 'Pending' option is highlighted in blue. A 'Search' button is located below the dropdowns. Below the search panel is a 'User Actions' section.

To view transactions that you have submitted, change the Current Role search option to Requester and click Search.



The screenshot shows the same 'Search Criteria' panel. The 'Current Role' dropdown is open, showing a list of options: 'Approver' and 'Requester'. The 'Requester' option is highlighted in blue. The 'Approver Status' dropdown is closed. The 'Search' button is visible below the dropdowns.

Note: Going forward, you will be able to view all historical transactions (pending, approved, denied, or processed). However, only transactions submitted after April 27, 2013 will be visible.

Current HR transactions include: Create (and Post) a Position, Edit (and Post) a Position; Create a Requisition; Edit a Requisition; Pay Rate Changes (Acting Pay); and ePerformance/Merit Transactions.

Viewing Transactions (continued)

Click on a transaction to view the details, status, and to see who has already approved and who still needs to approve.

Approval Process: Pay Rate Change Low Risk												
Need Catalog												
		Status	Transaction Number	Effective Date	Title	Empl ID	Employee Name	Hourly Rate	New Hourly Rate	Change Percent	Begin Date/	End Date
1	<input type="checkbox"/>	Pending	191050	2013-03-10	[REDACTED]	[REDACTED]	[REDACTED]	20.00	20.0000	6	2013-03-10	2013-03-23
2	<input type="checkbox"/>	Pending	191053	2013-03-10	[REDACTED]	[REDACTED]	[REDACTED]	20.00	20.0000	5	2013-03-10	2013-03-23



Pay Rate Change Low Risk

Salary Change Request Status

Employee ID: [REDACTED] Job Title: [REDACTED]
Department: [REDACTED] Effective Date: 03/10/2013
Old Hourly Rate: [REDACTED] Start Date: 03/10/2013
Change Percent: [REDACTED] End Date: 03/23/2013
Change Amount: [REDACTED] Action Reason: ACT Acting pay
New Hourly Rate: [REDACTED]

Status: Pending Approval

Comments: [REDACTED]

Approval Workflow

TRANSACTION_NBR=191123: Pending

Approvals

```
graph LR; A["Pending  
Susan Smith  
Approver"] --> B["Not Routed  
John Jones  
Approver"]; B --> C["Not Routed  
Fred Franklin  
Final Approver"];
```

Current HR transactions include: Create (and Post) a Position, Edit (and Post) a Position; Create a Requisition; Edit a Requisition; Pay Rate Changes (Acting Pay); and ePerformance/Merit Transactions.

Approving Transactions

The Worklist is being replaced by the new Monitor Approvals page on My HUB. By default, the Monitor Approvals page will display all transactions pending approval. Click on a transaction to view the details, enter an approval comment, and approve or deny.

Approval Process: Pay Rate Change Low Risk

Need Catalog

	Status	Transaction Number	Effective Date	Title	Empl ID	Employee Name	Hourly Rate	New Hourly Rate	Change Percent	Begin Date/	End Date
1	<input type="checkbox"/> Pending	191050	2013-03-10	[REDACTED]	[REDACTED]	[REDACTED]	2000	2000000	6	2013-03-10	2013-03-23
2	<input type="checkbox"/> Pending	191053	2013-03-10	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	5		2013-03-10	2013-03-23



Pay Rate Change Low Risk

Salary Change Request Status

Employee ID: [REDACTED] Job Title: [REDACTED]

Department: [REDACTED]

Effective Date: 03/10/2013

Old Hourly Rate: [REDACTED] Start Date: 03/10/2013

Change Percent: [REDACTED] End Date: 03/23/2013

Change Amount: [REDACTED] Action Reason: ACT Acting pay

New Hourly Rate: [REDACTED]

Status: Pending Approval

Comments

[REDACTED]

 Add Approval comments
 [REDACTED]

Approval Workflow

TRANSACTION_NBR=191123:Pending

Approvals

```

    Pending [Susan Smith, Approver] → Not Routed [John Jones, Approver] → Not Routed [Fred Franklin, Final Approver]
  
```

Current HR transactions include: Create (and Post) a Position, Edit (and Post) a Position; Create a Requisition; Edit a Requisition; Pay Rate Changes (Acting Pay); and ePerformance/Merit Transactions.

Approving Transactions (continued)

Transactions also can be approved or denied directly from the new Monitor Approvals page. Check the box to the left of each transaction that is to be approved or denied, enter a comment in the User Actions section, and then either click Approve Selected or Deny Selected.

One benefit of approving directly from this page is that multiple transactions can be approved or denied at one time.

User Actions

Comment:

Search Results

[Select All](#) [Deselect All](#)

Approval Process: Pay Rate Change Low Risk

Need Catalog

		Status	Transaction Number	Effective Date	Title	Empl ID	Employee Name	Hourly Rate	New Hourly Rate	Change Percent	Begin Date/	End Date
1	<input type="checkbox"/>	Pending	191050	2013-03-10	[REDACTED]	6	2013-03-10	2013-03-23				
2	<input type="checkbox"/>	Pending	191053	2013-03-10	[REDACTED]	5	2013-03-10	2013-03-23				

Workflow Notifications and Escalations

Important Notes:

- The requestor will no longer receive confirmation emails when a transaction is submitted. To confirm the details and status of a requested transaction, navigate to the Monitor Approvals page. Change the Current Role search option to Requester and click Search.

Workflow emails will still be sent to the next pending approver. Workflow emails also will still be sent back to the requestor when the transaction has received the necessary approvals.

- For some approved transactions, Human Resources may still review and deny the transaction prior to processing it.
- New reminder emails will be sent to individuals who have pending transactions. For acting pay and merit transactions, reminder emails will be sent to the pending approver after two days and again after five days. For position and requisition transactions, reminder emails will be sent to the pending approver after three days and again after seven days. Reminder emails will be sent overnight.

Current HR transactions include: Create (and Post) a Position, Edit (and Post) a Position; Create a Requisition; Edit a Requisition; Pay Rate Changes (Acting Pay); and ePerformance/Merit Transactions.

Frequently Asked Questions

What happened to transactions that were submitted prior to April 27, 2013?

In order to transition to the new approval process, any HR transactions that are still pending approval when we switch to the new approval framework will be denied and will need to be resubmitted.

Why didn't I receive a confirmation email for a submitted transaction?

The requestor will no longer receive confirmation emails when a transaction is submitted. To confirm the details and status of a requested transaction, navigate to the Monitor Approvals page. Change the Current Role search option to Requester and click Search.

How do I view the details and status of transactions that I have submitted?

To view the details and status of a requested transaction, navigate to the Monitor Approvals page. Change the Current Role search option to Requester and click Search. Click on a transaction to view the details and status.

I do not have access to the My Staff section and the Manager Homepage, am I still able to approve transactions?

Yes. Click on the View/Update Personal Information link under My Profile and click on Monitor Approvals (Worklist).

Why can't I view a transaction that should be pending my approval?

It could be that you have delegated approval authority to someone else. To view accepted and active delegations, navigate to the Review My Proxies link within the Manage Delegations page.

Why did I receive a reminder email?

Reminder emails will be sent to individuals who have pending transactions. For acting pay and merit transactions, reminder emails will be sent to the pending approver after two days and again after five days. For position and requisition transactions, reminder emails will be sent to the pending approver after three days and again after seven days. Reminder emails will be sent overnight.

How do I delegate authority to approve my transactions?

To submit a delegation request, click on the Create Delegation Request link within the Manage Delegations page and follow the steps for defining the delegation period, selecting the transactions to delegate, and selecting a proxy.

The new delegation framework requires the delegator to submit a delegation request and the delegate (or proxy) to accept or deny that request. The delegation will not become active until the request is accepted by the proxy.

Current HR transactions include: Create (and Post) a Position, Edit (and Post) a Position; Create a Requisition; Edit a Requisition; Pay Rate Changes (Acting Pay); and ePerformance/Merit Transactions.

Frequently Asked Questions (continued)

How do I know if a submitted transaction is approved?

You should receive an email notification once the final approver has approved the transaction. The email will also inform you of the next steps. You can also view the status of a transaction at any time by navigating to the Monitor Approvals (Worklist) page, changing the search option to Current Role = Submitter, and clicking Search. The status that displays to the left of the transaction will let you know if it is approved or still pending approval. Click on the transaction to view the details. The status within the details will display if the transaction is now queued with HR or if it has been processed.

How do I know if a submitted transaction is processed and complete?

For position and requisition transactions, you will receive an automated email notification once the transaction is processed. For all transactions, can also view the status of a transaction at any time by navigating to the Monitor Approvals (Worklist) page, changing the search option to Current Role = Submitter, and clicking Search. The status that displays to the left of the transaction will let you know if it is approved or still pending approval. Click on the transaction to view the details. The status within the details will display if the transaction is now queued with HR or if it has been processed.

Note: for merit transactions, if the status in the details is Approved, then you are able to perform the back end steps of the associated performance review document (Mark Available, Employee Acknowledge, and Complete). Once the performance document is complete, the merit transaction will be automatically processed overnight and the status in the details should change to Processed.

What does Pending HR Approval mean?

When reviewing the details, you may see that an approved transaction has a status of Pending HR Approval. This means that the necessary approvals have been obtained and it is now in the hands of HR to review and process.

Why does the transaction status say approved, but it appears to have been denied?

When reviewing the details, you may see that a transaction has a status of Denied, even though the approval workflow status shows that it was approved. This means that the necessary approvals were obtained; however, either Human Resources or another system process denied the transaction after the approvals were obtained.

For example, a merit transaction may be denied even after it is approved if the manager changes the overall rating on the performance document. In that case, the manager would need to resubmit the document and merit for approval.

Frequently Asked Questions (continued)

The approval path for my transaction is showing a terminated employee or an employee who is no longer in an approval role. Why?

If an incorrect approver is displaying, then the approval path will likely need to be updated. Please contact Human Resources to have the path updated.

If the incorrect person is the pending approver, then the transaction will manually need to be reassigned to the correct person once the approval path is updated. Please mention this to Human Resources when working to update the path.

What does an error step mean when I am viewing the approval path for my submitted transaction?

An error step will be generated if the system is unable to determine the final approver for the transaction. One possible reason is that the person who was the final approver has terminated or changed positions. Another possible reason is that the approval path is incorrectly defined or is missing. The system administrators will be notified; however, it is also recommended that you contact your Human Resources representative if your transaction contains an error step in the approval path. They may be able to review the approval path configuration and resolve any discrepancies.

How do I update an approval path?

Please contact Human Resources to have an approval path updated for your department.