PeopleSoft HR

ECR Automation Process

Revise Existing SWB

May 2011
To process a Short Work Break Date revision using the automated ECR process, follow the menu navigation below:

Home > Employee Change Request (ECR) > Use > ECR Create

- If you know the Name or Eagle ID of the employee, type it into the appropriate field. A search can still be performed if you only have a partial name or Eagle ID.

**NOTE:** The Name fields are not case sensitive.
1. Verify the Eagle Id and Name of the employee for whom the transaction is being done.

2. Enter the Effective Date of the Short Work Break Date Revision. This is the Effective Date that will be reflected in PeopleSoft HR. This transaction can only be entered for an employee who has a future SWB row on Job Data.

   **NOTE:** To extend a SWB, a Job Earning Distribution transaction must be done.

3. Select “Revise existing SWB” from the ECR Action drop down field. This transaction is only used for those who have a future dated SWB row on Job Data that needs to be shortened.

   **Example:** An employee has a future dated SWB of 07/01/2011. The manager needs them to return on 06/15/2011. This transaction allows you to revise the date in the system. It must only be to shorten the SWB.

4. Click the Search button to display the Employee Jobs for the employee. This will display all the job records within the security access of the originator. This allows the user to determine which job record to select and run the Create ECR process.
5. Click the Create ECR button next to the job record for the Short Work Break Date revision.

**NOTE:** Any ECR transactions that have been processed for the employee will also display under the **Change Request Status** section of the page.
Information specific to the employee and important for processing a Short Work Break Date revision has been identified and captured in the top section of the screen. This information is reflective of the data specific to the job being updated. This data displays current information as of the effective date. It will not display future dated information for the employee.

**NOTES:**

- **Request ID and Status** will default to ‘NEW’ until the transaction has been submitted. The various statuses will update as the transaction goes through the process.

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Request</td>
<td>The status defaults to ‘New Request’ when the request is first opened.</td>
</tr>
<tr>
<td></td>
<td>The Request ID defaults to ‘New.’</td>
</tr>
<tr>
<td>Pending (area) Approval</td>
<td>The status is ‘Pending (area) Approval’ while waiting for approver action:</td>
</tr>
<tr>
<td></td>
<td>Approve or Deny. Possible approval areas are: Office of the Provost,</td>
</tr>
<tr>
<td></td>
<td>Restricted Funds, Compensation, Position Management, Foreign Tax, and</td>
</tr>
<tr>
<td></td>
<td>HRSC.</td>
</tr>
<tr>
<td>Denied</td>
<td>The status is set to ‘Denied’ when the request is denied by an approver.</td>
</tr>
<tr>
<td></td>
<td>Upon denial, the request is routed back to the originator. At this point,</td>
</tr>
<tr>
<td></td>
<td>the originator may cancel or resubmit the request. On resubmit, Request ID</td>
</tr>
<tr>
<td></td>
<td>remains the same as original.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The status is ‘Cancelled’ when the request is cancelled by the originator.</td>
</tr>
<tr>
<td></td>
<td>No further activity allowed on this request.</td>
</tr>
<tr>
<td>Manual Update</td>
<td>The status is ‘Manual Update’ when the HRSC rep presses the ‘Manual</td>
</tr>
<tr>
<td></td>
<td>Update’ button. The request must be entered into Job Data manually. This</td>
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<tr>
<td></td>
<td>is done in the event of a system error or if the rep determines that a</td>
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<tr>
<td></td>
<td>manual update is required. The request is complete. No further activity</td>
</tr>
<tr>
<td></td>
<td>allowed on this request however, the HRSC has the</td>
</tr>
</tbody>
</table>
ability to add a comment. The Originator will receive notification of the manual update.

**Completed**
The status is ‘Completed’ when the data is entered successfully into PeopleSoft.
No further activity allowed on this request however, the HRSC has the ability to add a comment.

- The **Other Job Records** link opens a screen that displays other job records the employee has (if applicable) that the user has security access to view.

![Table of Other Job Records](image)
6. Verify the FICA Status of the employee. This is very important when processing a Short Work Break Date Revision. In particular, if the employee is a foreign employee.
7. Verify the Effective Date is correct. The Change Reason will default in as END- End of Position Funding and will be grayed out. This is the only reason used and cannot be changed.

8. Originators and Approvers can enter comments as they go through the process. These will appear on the Workflow Tab and can be viewed by anyone involved in the approval path from the Originator to the HRSC. They can also be referenced at any time after the transaction has been completed.

9. Enter the **Submit** Button when all the required information has been entered. This will begin the workflow and assign a Request ID to the transaction.
After the Short Work Break Date Revision request is submitted, the workflow approval path is displayed on the second tab called ‘Comments/Workflow Tracking’. This will show each department that must approve the transaction before it is processed in the HRSC.

The request can be viewed by the originator and the approvers at any point during the workflow process for a status update.
To view a transaction that is in process or already completed, follow the menu navigation below:

**Home > Employee Change Request (ECR) > Inquire > ECR Inquire**
1. In this top section, the user can enter any field and/or multiple fields to search for an ECR. It is also useful to review ECR data already in the system.

2. Hit the Search button to display any ECR Requests that meet the search criteria entered. If a broader search is done against certain fields, the data can be downloaded to excel by selecting the spreadsheet button to the far right of the header. 

3. Click the Select button next to the request to pull up a specific ECR Inquiry Page. All the fields will be grayed out except for the current approver of the transaction.
Canceling an ECR Transaction Request

Home > Employee Change Request (ECR) > Inquire > ECR Inquire

- The Originator is the only one who can cancel an ECR Transaction Request.
- A request can be cancelled at any point during the approval process before the status is updated to ‘Completed’.
• Select ‘Cancel’ at the bottom of the Inquiry Page.

• Confirm the status has been updated to ‘Cancelled’.

• Upon cancellation, an email notification is sent to the pending approver and prior approvers indicating the transaction has been cancelled.
1. An approver has the option to go through his worklist to view any transactions or through ECR > Inquiry to get to the transaction.

2. The worklist allows the user to filter on the different transactions that come through the worklist. The Short Work Break Date revision filter name is ‘Review SWB Transaction’. This will display only those items under the selected filter.

3. Each worklist item is defined within a link that displays the employee’s name, eagle ID and effective date of the transaction. Click on this link to go directly to the transaction page and review the information.
4. If the information provided is accurate, the approver will click ‘Approve’ to advance the workflow to the next approver on the list. The workflow tab indicates the route and where it is in the process. It will reflect updated information after each step.

If the information is not correct for any reason, the approver has the option to deny the request. This will send a notification email and the request directly back to the originator with a required comment as to why it has been denied. The originator has the option to re-submit the request or to cancel the request.
5. If a request is denied, the originator can make changes to the request and Resubmit it or Cancel the request.
6. When a request is resubmitted, the workflow will readjust according to the changes made and begin the routing cycle again. It will display all activity pertaining to the request, including the resubmission through to completion.