

PeopleSoft HR

ECR Automation Process

Revise Existing SWB

May 2011

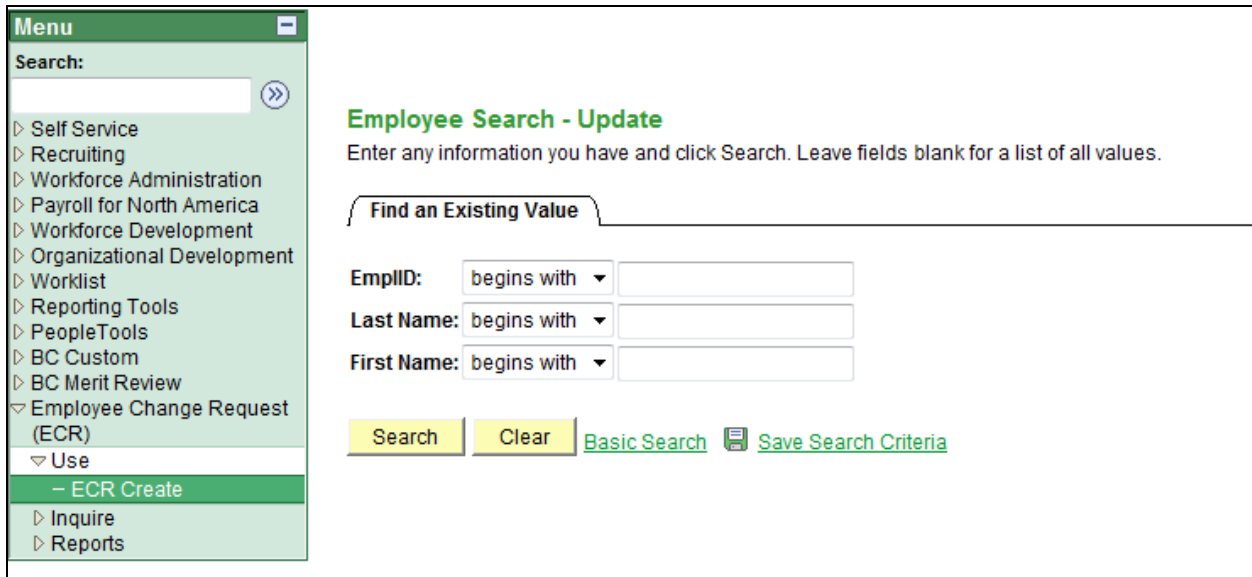
Processing a Short Work Break Date Revision

ECR Search Page



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.

ECR Search Page

ECR Employee Search

Employee Search Criteria

Empl ID: 20168550 Fudd, Elmer A **1**

Effective Date: **2**

ECR Action: **3**

4

Below is a list of all job records for this employee for which you have access as of the effective date above. To create an ECR, first select the Action then click the Create ECR button.

Employee Jobs									
Rcd#	Eff Date	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary
<input type="button" value="Create ECR"/>	0								<input type="checkbox"/>

Below is a list of ECRs that have been created for the jobs listed above. To view more information about the request or to cancel a request, click on the Select button.

Change Request Status									
Select	Request ID	Rcd#	Eff Date	Action	Status	DeptID	Dept Name	Position	Title
<input type="button" value="Select"/>		0							

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.

ECR Search Page

ECR Employee Search

Employee Search Criteria

Empl ID: 27041848

Effective Date: 06/01/2011

ECR Action:

Below is a list of all job records for this employee for which you have access as of the effective date above.
To create an ECR, first select the Action then click the Create ECR button.

Employee Jobs										
	Rcd#	Eff Date	Empl Status	Action	Reason	DeptID	Dept Name	Position	Title	Primary
<input type="button" value="Create ECR"/>	0	05/25/2008	Short Work Break	Short Work Break	END-End of Position/Funding	023113	Catering & Event Planning	00000475	Waitstaff	<input checked="" type="checkbox"/>
5 <input type="button" value="Create ECR"/>	1	10/31/2009	Short Work Break	Short Work Break	END-End of Position/Funding	023116	Athletic Concessions	00000412	Food Service Concessions	<input type="checkbox"/>

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.

ECR Short Work Break Date Revision Request Page

NEW VII

Change Request Comments/Workflow Tracking

REVISE EXISTING SWB

Request ID: NEW	EmplID: 85754518	Total Number of Records: 1	Other Job Records
Status:	Name:	Rcd#:	0

Empl Status: Active	Benefit Program: BC1	<input checked="" type="checkbox"/> Primary
Department: 050050	BC Annual Salary:	Benefits Base:
Position: 00012079	Comp Rate:	Periods/Yr: 12.00
Job Code: 246830	Pay Group: MON	Comp Freq: M
Citizenship:	Reg/Temp: Regular	FT/PT: Full-Time
Visa Type:	Empl Class: A-FtAdmin	Std Hrs: 35.00
Visa Exp Dt:	Service Date: 06/03/1998	Rehire Date: 10/01/2000
	Hire Date: 11/03/1997	<input checked="" type="checkbox"/> BC Budgeted Position

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.

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

	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.

EmpID:	Name: Stephen B							
Other Job Records for which you have access 1 of 1								
<u>Rcd #</u>	<u>Effective Date</u>	<u>Empl Status</u>	<u>Action</u>	<u>DeptID</u>	<u>Dept Name</u>	<u>Position</u>	<u>Position Title</u>	<u>Primary</u>
0								<input type="checkbox"/>

ECR Short Work Break Date Revision Page (Lower Section)

Change Request **Comments/Workflow Tracking**

REVISE EXISTING SWB

Request ID: 2168	EmplID: 85754518	Total Number of Records: 1	Other Job Records
Status: Pending Position Management Approval	Name:	Rcd#: 0	

Empl Status: Active	Benefit Program: BC1	<input checked="" type="checkbox"/> Primary
Department: 050050	BC Annual Salary:	Benefits Base:
Position: 00012079	Comp Rate:	Periods/Yr: 12.00
Job Code: 246830	Pay Group: MON	Comp Freq: M
Citizenship:	Reg/Temp: Regular	FT/PT: Full-Time
Visa Type:	Empl Class: A-FAdmin	Std Hrs: 35.00
Visa Exp Dt:	Service Date: 06/03/1998	Rehire Date: 10/01/2000
	Hire Date: 11/03/1997	<input checked="" type="checkbox"/> BC Budgeted Position

Funding Accounts: [Find](#) | [View All](#) | First Last

Start Date: 10/19/2009 Stop Date:

Account Codes [Find](#) | [View All](#) | First Last

Account Code: 50050-100-10000-51100D001

DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
050050	100	10000	00000		00000	201	51100	MRG	100.000	D001

*FICA Status-Employee **6**

Revise Existing Short Work Break

Effective Date: 06/15/2011 Action: SWB **7** Change Reason:

Comments: **8**

[Return to Search](#) **9**

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.

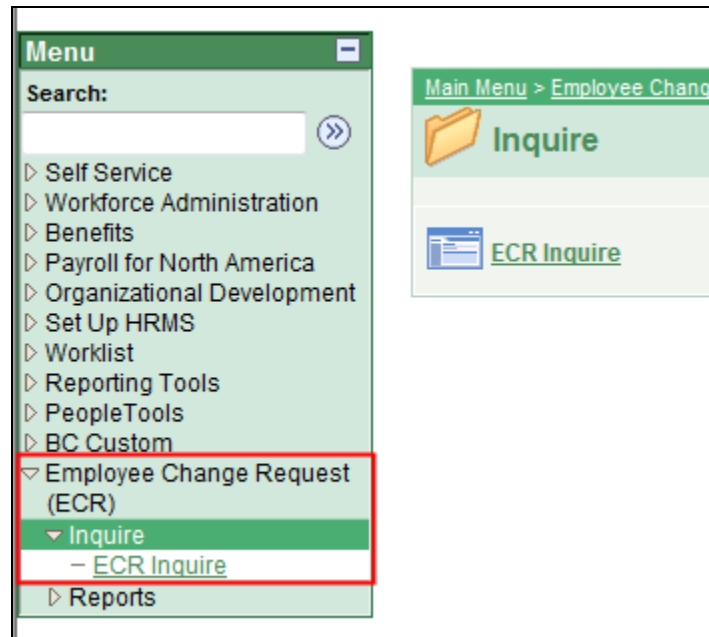
7. Verify the Effective Date is correct. The Change Reason will default in as END- End of Position Funding and will be grayed out. This is the only reason used and cannot be changed.
8. Originators and Approvers can enter comments as they go through the process. These will appear on the Workflow Tab 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.

ECR Short Work Break Date Revision Comments/Workflow Tracking Page

Change Request		Comments/Workflow Tracking	
Request ID:	2168	ECR Status:	New Request
EmplID:	85754518	Rcd#:	0
Comments / Tracking			1 of 1
User Name	DateTime	Action	Comment
Susan Cantillon	05/06/2011 2:45PM	Submitted	test
Review Workflow Routing			1-3 of 3
Description	Action	Oprid	DateTime Stamp
Originator	Originated	CANTILSU	05/06/2011 2:45PM
Position Management			
HRSC			

- 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.

ECR Transaction Inquiry



To view a transaction that is in process or already completed, follow the menu navigation below:

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

ECR Employee Search

Enter any information you have and click Search. Leave all fields blank for a list of all values.

Request ID: 1 Department:

EmplID: Transaction Type:


Last Name: ECR Status:

First Name: From Date: BT Thru Date: BT

2

To view more information about a request, click on the Select button.

Employee Change Requests												
	ID	EmplID	Name	Rcd#	Eff Date	Action	Status	Originator	Current Owner	Last Updt Date	DeptID	Dept Name
3	Select			0								

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

Change Request [Comments/Workflow Tracking](#)

REVISE EXISTING SWB

Request ID: 2168	EmplID: 85754518	Total Number of Records: 1	Other Job Records
Status: Pending Position Management Approval	Name:	Rcd#: 0	

Empl Status: Active	Benefit Program: BC1	<input checked="" type="checkbox"/> Primary
Department: 050050	BC Annual Salary:	Benefits Base:
Position: 00012079	Comp Rate:	Periods/Yr: 12.00
Job Code: 246830	Pay Group: MON	Comp Freq: M
Citizenship:	Reg/Temp: Regular	FT/PT: Full-Time
Visa Type:	Empl Class: A-FtAdmin	Std Hrs: 35.00
Visa Exp Dt:	Service Date: 06/03/1998	Rehire Date: 10/01/2000
	Hire Date: 11/03/1997	<input checked="" type="checkbox"/> BC Budgeted Position

Funding Accounts: [Find](#) | [View All](#) First Last

Start Date: 10/19/2009 Stop Date:

Account Codes [Find](#) | [View All](#) First Last

Account Code: 50050-100-10000-51100D001

DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
050050	100	10000	00000		00000	201	51100	MRG	100.000	D001

*FICA Status-Employee

Revise Existing Short Work Break

Effective Date: 06/15/2011 Action: SWB Change Reason:

Comments:

[Return to Search](#)

- 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.

Approve/Deny an ECR Transaction Request

Worklist for MCNAMARB: Barbara McNamara

Work List Filters: Review SWB Transaction

From	Date From	Work Item	Worked By Activity	Priority	Link	
Susan Hynes	05/06/2011	Review SWB Transaction	BC_TRXN_DISABILITY		06/15/2011	Mark Worked Reassign
Richard Young	05/17/2011	Review SWB Transaction	BC_TRXN_DISABILITY		11.06/15/2011	Mark Worked Reassign

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.

Change Request **Comments/Workflow Tracking**

REVISE EXISTING SWB

Request ID: 2168	EmplID: 85754518	Total Number of Records: 1	Other Job Records
Status: Pending Position Management Approval	Name:	Rcd#: 0	

Empl Status: Active	Benefit Program: BC1	<input checked="" type="checkbox"/> Primary
Department: 050050	BC Annual Salary:	Benefits Base:
Position: 00012079	Comp Rate:	Periods/Yr: 12.00
Job Code: 246830	Pay Group: MON	Comp Freq: M
Citizenship:	Reg/Temp: Regular	FT/PT: Full-Time
Visa Type:	Empl Class: A-FtAdmin	Std Hrs: 35.00
Visa Exp Dt:	Service Date: 06/03/1998	Rehire Date: 10/01/2000
	Hire Date: 11/03/1997	<input checked="" type="checkbox"/> BC Budgeted Position

Funding Accounts: Find | View All First 1 of 1 Last

Start Date: 10/19/2009 **Stop Date:**

Account Codes Find | View All First 1 of 1 Last

Account Code: 50050-100-10000-51100D001

DeptID	Fund	Fund Srce	Program	Proj/Grt	Property	Func	Account	Earn Code	Percent	Seq#
050050	100	10000	00000		00000	201	51100	MRG	100.000	D001

*FICA Status-Employee

Revise Existing Short Work Break

Effective Date: 06/15/2011 **Action:** SWB **Change Reason:**

Comments:

[Return to Search](#)

4

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.

Change Request [Comments/Workflow Tracking](#)

REVISE EXISTING SWB

Request ID: 2169	EmplID: 85754518	Total Number of Records: 1	Other Job Records
Status: Denied	Name:	Empl Rcd#: 0	

Empl Status: Active Department: 050050 Position: 00012079 Job Code: 246830 Citizenship: Visa Type: Visa Exp Dt:	Benefit Program: RC:1 BC Annual Salary: Comp Rate: Pay Group: MON Reg/Temp: Regular Empl Class: A-FtAdmin Service Date: 06/03/1998 Hire Date: 11/03/1997	<input checked="" type="checkbox"/> Primary Benefits Base: Periods/Yr: 12.00 Comp Freq: M FT/PT: Full-Time Std Hrs: 35.00 Rehire Date: 10/01/2000 <input checked="" type="checkbox"/> BC Budgeted Position
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Funding Accounts: [Find](#) | [View All](#) | First Last

Start Date: 10/19/2009 Stop Date:

Account Codes [Find](#) | [View All](#) | First Last

Account Code: 50050-100-10000-51100D001

DeptID	Fund	Fund Srce	Program	ProjGrt	Property	Func	Account	Earn Code	Percent	Seq#
050050	100	10000	00000		00000	201	51100	MRG	100.000	D001

*FICA Status-Employee

Revise Existing Short Work Break

Effective Date: 06/15/2011 **Action:** SWB **Change Reason:**

Comments:

[Return to Search](#)

Resubmit Cancel 5

5. If a request is denied, the originator can make changes to the request and Resubmit it or Cancel the request.

Request ID: 2169

ECR Status: Pending

EmplID: 85754518

Rcd#: 0

Comments / Tracking

1-3 of 3

User Name	DateTime	Action	Comment
Susan Hynes	05/06/2011 3:47PM	Submitted	-submitted for approval without comments-
Barbara McNamara	05/06/2011 3:50PM	Denied	NO
Susan Hynes	05/06/2011 4:02PM	Submitted	

Review Workflow Routing

1-3 of 3

Description	Action	Oprid	DateTime Stamp
Originator	Originated	HYNES	05/06/2011 4:02PM
Position Management			
HRSC			

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.