



PEOPLESOFT

HCM

eForms
UAT Checkpoint

May 1, 2017

AGENDA

1. Week 1 Review
2. Week 2 Overview
3. Supports
4. Reminders

WEEK 1 - HIRE

- 47 eForms have been created in UAT
 - 12 executed
 - 2 partially approved
 - 20 pending
 - 12 saved
 - 1 withdrawn

WEEK 1 - HIRE

- Processing
 - First semi-monthly pay for April being confirmed tonight as per schedule
 - May not see results of some Hire forms until tomorrow
- Issues
 - Compensation rate validation when FTE < 1.0
 - Additional Pay
 - Out of Province updates incorrectly
- How is testing going from **your** perspective?

WEEK 2 – JOB CHANGE

- Account change
- Extension

- Do not submit forms for Reports to/Supervisor ID changes, one-time payments or ongoing payments - *for now*

WEEK 2 – JOB CHANGE

- Known Issues
 - Comp rate validation for FTE < 1.0
 - Supplemental Pay (i.e., Market Pay or anything that is added to base compensation)
- Will let you know when these issues have been resolved

SUPPORTS

- Training material will be made available throughout UAT (we appreciate your patience!)
 - Two more guides are being updated and will be posted soon
- **University Terrace 2-47** will be available **Wednesday afternoons & Friday mornings** for testing and support
 - *Do these days/times work for you?*
- eForms UAT site – <http://www.se2.ualberta.ca/eFormsUAT>

REMINDER - LOGGING ISSUES

- One person from each Faculty to coordinate on Faculty's behalf
- Email issues to TestHCM@ualberta.ca; **include UAT in the subject line**
- Project team will review, triage and log a ticket, if necessary
- One issue per email, where possible
- Provide as much detail as possible (see sample)

REMINDER - OTHER NOTES

- UAT reflects data as of November 14, 2016
 - Won't include new combo codes, etc.
- UAT data is scrambled
 - **Don't search by SIN or Name**
- Effective Date – ensure this is correct when entered; if you change it, all Job related fields will be blanked out.

QUICK TIPS

- Worklist items can be sorted by clicking on the Title of the column you wish to sort by
- Select the Earnings Code *before* selecting the Combo Code / Speed Code
- Earnings Code 018 is a “non-pay” earn code and was created solely to setup the Job record for Casual employees. Earn Code 011 will continue to be used to enter time.
- When Recycling an eForms, click on the down arrow in the Comments section to display the text box

QUICK TIPS

- Do not process eForms with an Effective Date prior to November 1, 2016
- Temp Job Codes should no longer be used. They are only available because some Active Job records are still associated with them.

QUICK STEPS – JOB CHANGE FORM

- To extend a person's Expected End Date
 - From the Search Results page, choose the **Active Job** row
 - Select the menu item **Take Other Job Action**
 - Change the date in the ***Appointment End Date** field

QUICK STEPS – JOB CHANGE FORM

- To transfer a person from one Job / Position, to another Job / Position within the Department(s) to which you have access
 - From the Search Results page, choose the **Active Job** row
 - Select the menu item **Take Other Job Action**
 - To change the employee to a different type of employee, (e.g., transfer a Casual Employee to a Position), you **must** change the Empl Group first to reflect the new type. This will refresh the form.
 - Change the Job Code or Position. The form will refresh to reflect what you have chosen and provide the fields that require input.

QUICK TIPS – JOB CHANGE FORM

- To transfer a person who is currently **NOT** in a Department to which you have access, a Hire form should be used.