

THE UNIVERSITY of TENNESSEE



Electronic HR Forms

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International HERUG Conference

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Tunica, Mississippi

UNIVERSITY of TENNESSEE



Introduction

- ◆ Founded in 1794
- ◆ In 1968 became statewide university system
- ◆ 42,000 students statewide
- ◆ 26,000 employees statewide
- ◆ Campuses in Knoxville, Memphis, Chattanooga, Martin, Tullahoma
- ◆ Employees in all 95 Tennessee counties





UT Campus Locations



1. Memphis – 388 miles
2. Martin – 295 miles
3. Tullahoma – 149 miles
4. Chattanooga – 113 miles
5. Knoxville – Main Campus



SAP Environment Overview

- ◆ R/3 Release 4.6B (migrating to 4.6C)
- ◆ SAP Modules: HR, FI, CO
- ◆ HR-PS Add-on Release 4.61
- ◆ HR Module live since January 1, 2002
- ◆ FI Module live since April 1, 2001
- ◆ 1,800 R/3 Users



Background and Motivation

History

- Desire to reduce number of paper forms
- HR module lacks “parking ability”
- Discovery of tools and techniques to overcome situation
- Proof of Concept Project from October 8, 2002 through November 13, 2002
- Currently in Pilot Testing Phase of 3 forms

Team Members

- HR Functional – design and testing
- ABAP – design and programming
- Workflow – design and programming
- End Users – design and testing
- Security – authorizations and support
- Management Support

1 End Users

- ✓ Make Forms accessible from IRIS Menu system or Web with proper Security imposed
- ✓ Provide pre-population of form data with ability to overtype changes
- ✓ Make forms easier to use because of data pre-population, edits, code lists, etc.
- ✓ Provide Email notification of form's processing status

Main Goals

2 Approvers

- ✓ IRIS Workflow approval routing
- ✓ Simplified presentation of modified data
- ✓ Eliminate paper signatures and increase utilization of Business Workplace

3 University

- ✓ Reduced processing time
- ✓ More accurate data
- ✓ No re-keying of data once in electronic format



SAP

Actions Goto System Help

Employee Termination Form

Personnel no	10202103	Name	Sauceman Jr, Jim	MO
EE group	R Regular	Subarea	1010	Empl. % 100.00
EE subgroup	10 Staff.Exec/Admin			CostCtr E011001

Primary Position: 20008384 PROF & DIRECTOR E011001

Termination Information

Type of Termination:	10 Termination	Hire Date:	09/
Termination Reason:	15 Personal reasons	Last Day To Be Paid:	03/31/2003
		Effective Date:	04/01/2003

Annual Leave Balance:	0.00000	To be Paid:	
Compensatory Balance:	0.00000	To be Paid:	

Address Information

Home Address:	Name	Sauceman Jr, Jim		
	Care Of			
	Address Line #1	225 Russell Road		
	Address Line #2	Box 225		
	City	Rockford	State	TN
	Zip Code	37853	County	005 Blount

Employee Identification Information

Lists available for coded fields

Data Pre-populated from Infotypes



Employee Goto System Help SAP

Employee Termination Approval Form

Approve Termination Reject Termination Work Item History

Personnel no	10202103	Name	Sauceman Jr, Jim	Monthly	Ac
EE group	R Regular	Subarea	1010 Knoxville	Empl. %	100.00
EE subgroup	10 Staff.Exec/Admin	CostCtr	E011001		

Primary Position: 20008384 PROF & DIRECTOR E011001

Termination Information

Type of Termination:	10 Termination	Hire Date:	09/01/200
Termination Reason:	15 Personal reasons	Last Day To Be Paid:	03/31/200
Effective Date:			

Annual Leave Balance:	0.00000	To be Paid:	0.00000
Compensatory Balance:	0.00000	To be Paid:	0.00000

Comments:

Position Change Information

Primary Position Changes for:	20008384 PROF & DIRECTOR
Organizational unit	10000333 Administration-Arts & Sci

Convenient Approve / Reject Buttons

Approver can focus on relevant data



SAP
Actions Goto System Help

Pay Funding Change - Submit

Submit for Approval
Submit for Approval

Personnel no	10202103	Name	Sauceman Jr, Jim		Monthly	Active
EE group	R Regular	Subarea	1010	Knoxville	Empl. %	100.00
EE subgroup	10 Staff.Exec/Admin				CostCtr	E011001

New
Old

Validity Period 10/01/2001 to 12/31/9999 1 of 1

Cost Distribution by Positions										
C...	Change Reason	From	To	Position	Position Text	Cost ctr	WBS element	Wa...	Amount	Cst
15	Inc Responsibilities - ...	10/01/2001	12/31/9999	20008384	PROF & DIRECTOR	E010110		1REG	3,000.00	74
15	Inc Responsibilities - ...	10/01/2001	12/31/9999	20008384	PROF & DIRECTOR		R011007019	1REG	1,000.00	24
15	Inc Responsibilities - ...	10/01/2001	12/31/9999	20008384	PROF & DIRECTOR	E010124		1REG	50.00	1

Total Salary 4,050.00 USD

Total Cost Pct 100.00

Total Effort Pct 100.00

Comments:



HR Forms Routing Technique

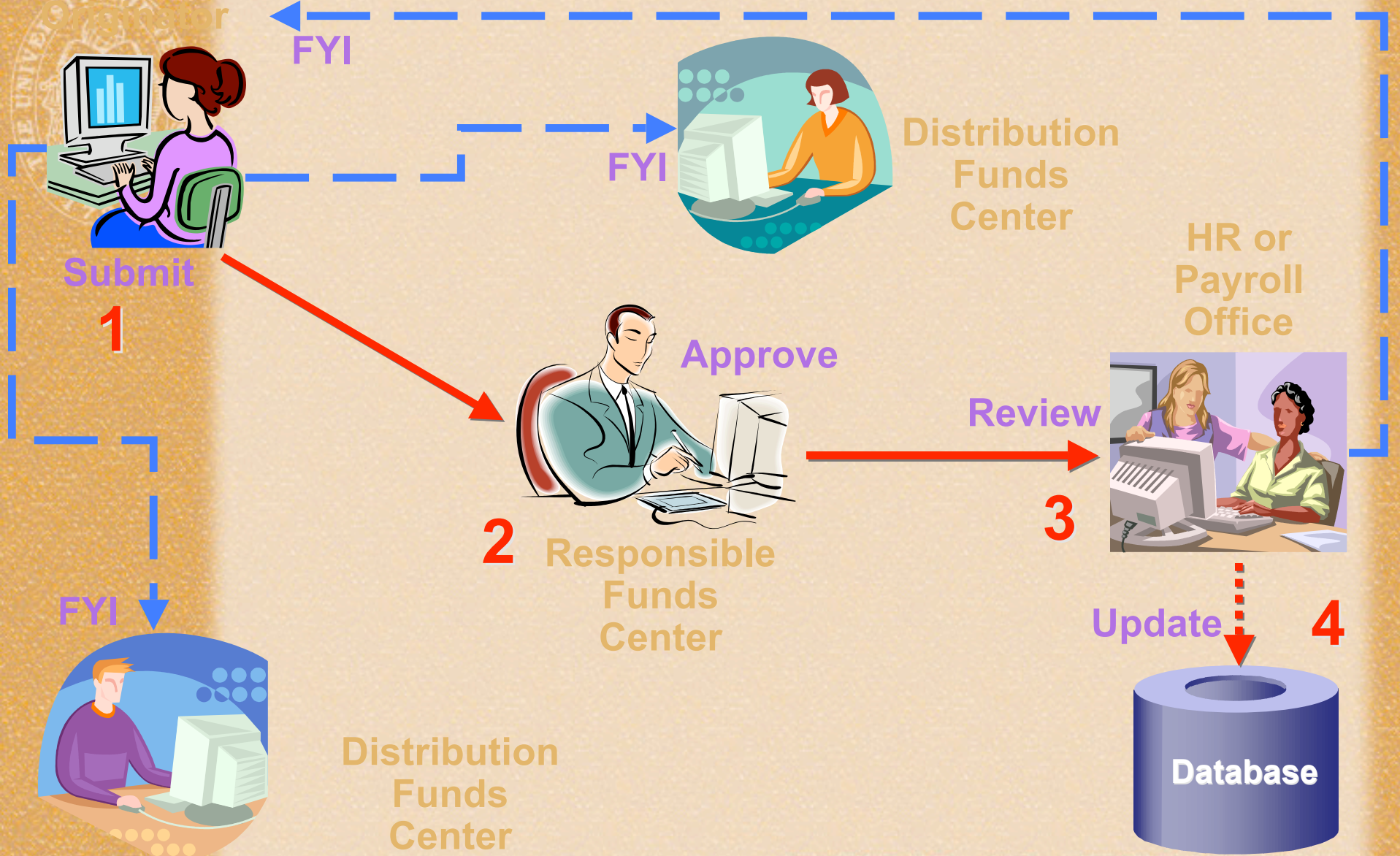
- ◆ Using Workflow Definition to enforce policy decisions
- ◆ Using Z-table to indicate campus choices of desired approval levels
- ◆ Using Workflow Standard Roles to target correct user population



Sample Routing Configuration Spreadsheet

Submitted by	1070 Memphis			Effective Date			A - Approval F - FYI	
	John Smith	1/1/1900		to	12/31/9999			
Date	2/25/2003	Beginning		Ending				
Pay Change	Regular			Term				
Level	Faculty	Exec/Adm Professional	Non-Exempt	Faculty	Exec/Admin Professional	Non-Exempt	Other	Undergrad
Departmental Reviewer								
Department Head (Primary)	A	A	A	A	A	A	A	A
Dept Head (Distribution Acct)	A	A	A	A	A	A	A	A
Campus Reviewer								
Human Resources		A	A		A	A		
HR Notification Group								
Dean	A			A				
Vice Chancellor								
Unit Chief Business Office	A	A	A	A	A	A		
Final Destination	A	A	A	A	A	A	A	A
After Entry Notifications								
Originator	F	F	F	F	F	F	F	F

Employee Termination Approval Workflow





- ◆ HR PIF/PAF Master Data Changes
- ◆ Application for Employment
- ◆ Budget Revisions
- ◆ IRIS User ID Creation and Changes
- ◆ Approver Responsibility or Security Changes
- ◆ Any University form for which approvals are necessary



Questions??



Thank you!