Electronic HR Forms
by Les Mathews and Jim Sauceman

International HERUG Conference
April 28 – May 1, 2003
Tunica, Mississippi
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
**Main Goals**

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

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
Employee Identification Information

Lists available for coded fields

Data Pre-populated from Infotypes
Convenient Approve / Reject Buttons

Approver can focus on relevant data
**Pay Funding Change - Submit**

Personnel no: 16202103  Name: Sauceman Jr. Jim

- EE group: R (Regular)
- Subarea: 1310 (Knoxville)
- EE subgroup: 16 (Staff/Exec/Admin)

Monthly Active
- Emp. %: 100.00
- CostCtr: E011061

### Cost Distribution by Positions

<table>
<thead>
<tr>
<th>Change Reason</th>
<th>From</th>
<th>To</th>
<th>Position</th>
<th>Position Text</th>
<th>Cost ctr</th>
<th>WBS element</th>
<th>WBC Amount</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inc Responsibilities</td>
<td>10/01/2001</td>
<td>12/31/9999</td>
<td>20008384</td>
<td>PRDF &amp; DIRECTOR</td>
<td>E310110</td>
<td>REG</td>
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**Total Salary**: 4,056.00 USD
**Total Cost Pct**: 100.00
**Total Effort Pct**: 100.00

**Comments**: [Comment field]
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

<table>
<thead>
<tr>
<th>Level</th>
<th>Faculty</th>
<th>Exec/Admin Professional</th>
<th>Non-Exempt</th>
<th>Faculty</th>
<th>Exec/Admin Professional</th>
<th>Non-Exempt</th>
<th>Other</th>
<th>Undergrad</th>
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<tr>
<td>Departmental Reviewer</td>
<td>A</td>
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<tr>
<td>Dept Head (Distribution Acct)</td>
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<tr>
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<tr>
<td>After Entry Notifications</td>
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<tr>
<td>Originator</td>
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</tr>
</tbody>
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Submitted by: John Smith
Date: 2/25/2003
1/1/1900 to 12/31/9999
Pay Change: 1070 Memphis
Effective Date: 2/25/2003

A - Approval
F - FYI

John Smith
to 2/25/2003
- 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!