



Going Green in HR with Workflow and EPAF

Presented by: Rohini Ananthakrishnan
Chris Bennett
University of Denver
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Session ID 0202

Session Rules of Etiquette

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- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

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Introduction

Objective

- To demonstrate how the University of Denver implemented a web based hiring process for its non-benefited employees using Workflow and EPAF.

Benefits

- Gain an understanding how certain Banner tools (Workflow and EPAF) may be utilized to customize a business process for your particular institution.

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About the University of Denver

- Private institution
- 12,000 students
- 4,000 total employees (2,400 benefited employees)
- \$335 million operating budget
- Live on Banner Human Resources since 2000
- Banner Position Control 8.2.1
- Banner Workflow 8.0.1

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Agenda

- Project overview and goals
- Hiring process
- Benefits
- Lessons learned
- Proposed roadmap

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Project Overview and Goals

"Automate hiring process using Banner Workflow, Self-Service, and Electronic Personnel Action Forms (EPAF)."

Goals:

- Go paperless
- Enforce human resources policy
- Eliminate data errors
- Increase processing efficiency
- Better resource utilization

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Hiring Process - Old

- **Initiate Request**
 - Complete hiring request paper form
 - Request submission via fax, on-campus mail, or walk-in.
- **Approval**
 - Multi-Level
 - Manual data and human resources policy validation
- **Fulfillment**
 - Manual data entry into Banner (PEAEMPL & NBAJOBS)

Old Form

UNIVERSITY OF DENVER		NON-REGISTERED HERE AND TERMINATION FORM	
Faculty ID # _____	Classified _____	Assignment Remarks (1) _____	Current Remarks (2) _____
Student (1) _____	From Campus Term Student (2) _____	From Campus Remarks (1) _____	From Campus Remarks (2) _____

EMPLOYMENT INFORMATION	
Department _____	Job Title _____
Employment Status _____	Term (1/2/3/4) _____
Effective Date _____	Termination Date _____
Classified _____	Classified _____
Classified _____	Classified _____

DEPARTMENT INFORMATION	
Department Name _____	
Department Address _____	
Department Phone _____	
Department Fax _____	
Department E-mail _____	
Department Website _____	

EMPLOYMENT INFORMATION	
Employment Status _____	
Term (1/2/3/4) _____	
Effective Date _____	
Termination Date _____	
Classified _____	
Classified _____	

EMPLOYMENT INFORMATION	
Employment Status _____	
Term (1/2/3/4) _____	
Effective Date _____	
Termination Date _____	
Classified _____	
Classified _____	

For the employee's signature and date, I hereby certify that all information on this form is true and correct. **Print Name, Title**

Form Prepared By: _____ **Classified:** _____

APPROVED BY SUPERVISOR:

This form may be filed as additional pay for approved faculty completing nonrelated related duties.

This form may be used as the payroll record for the payment. Data entered on this payroll document.

Hiring Process - New

- **Initiate Request**
 - Submit an electronic hiring request form
 - Automated data and human resources policy validation
- **Approval**
 - Multi-Level
 - Electronic signature
 - Automated data entry into Banner (Fulfillment)

Initiate Request – Electronic Form

The screenshot shows the 'nextCentral' web application interface for 'UNIVERSITY OF IDAHO'. The page title is 'Non-Benefited Employee Hire'. It includes a search bar at the top right. The main form area has the following fields:

- Employee SSN: [Text Field]
- Employee Last Name: [Text Field]
- Employee First Name: [Text Field]
- RELEASE: [Dropdown Menu]

At the bottom, there is a 'Save' button and a 'Print' button.

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Initiate Request – Electronic Form (Cont'd)

This screenshot shows the same 'nextCentral' web application interface, but with additional information displayed below the main form fields:

- Below the 'RELEASE' dropdown, there is a section titled 'Please select the Employee you wish to Hire from the list below:'.
- Below this section, there is a list of employees with checkboxes and names: 'CARTER, David', 'CARTER, David', 'CARTER, David', 'CARTER, David'.
- Below the list, there is a 'RELEASE' dropdown menu.
- At the bottom, there is a 'Save' button and a 'Print' button.

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Initiate Request – Electronic Form (Cont'd)

This screenshot shows the same 'nextCentral' web application interface, but with additional information displayed below the main form fields:

- Below the 'RELEASE' dropdown, there is a section titled 'Type of Non-Benefited Position:'.
- Below this section, there is a list of positions with checkboxes and names: 'CARTER, David', 'CARTER, David', 'CARTER, David', 'CARTER, David'.
- Below the list, there is a 'RELEASE' dropdown menu.
- At the bottom, there is a 'Save' button and a 'Print' button.

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Initiate Request – Electronic Form (Cont'd)

Personal Info
Account
Dev Officers
Student
Financial Aid
Employers
WebTutor
Finance

Search

Non-Benefited Employee Hire

Employee Name: Second Little Pig
Position Type: Graduate Assistant (GTA & GRA) (660)
Job Effective Date: 01/01/2010

DEPARTMENT/JOB INFORMATION

TimeSheet Organization:

Job Title:

Job End Date (Optional): MM/DD/YYYY

Hours Per Day: hrs. min.

Hours Per Pay Period: hrs. min.

Initiate Request – Electronic Form (Cont'd)

Monthly Rates			
XXXXXX.NNN			
Ends:	Select	Select	Select
Origin:	Select	Select	Select
Account:	Select	Select	Select
Activity:	Select	Select	Select
Decrease:	100.00	XXXX.NNN	XXXX.NNN
Reasons/Comments:			
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>			
<input type="button" value="Submit for Approval"/>			

IT Perspective - Initiate Request

- **Self-Service Package**
 - Data Entry
 - Business Rules
 - Data and HR Policy Validation
 - Initiate Workflow
- **Web Tailor Setup**

IT Perspective – Initiate Request (Cont'd)

Workflow Event Setup in Banner

- GTVEQTS – Make sure that WORKFLOW is added.
- GTVEQPM – Setup up any additional parameters.
- GTVEQPG – Add the Parameter Group Code.
- GOREQPG – Add workflow parameters to Parameter Group Code.
- GTVEQNM - Define Banner Business Event
- GOREQNM - Associate the event with the parameter group

IT Perspective – Initiate Request (Cont'd)

Procedure to Initiate Workflow

```
create or replace procedure p_du_send_workflow_event(p_event
VARCHAR2,p_wf_specific_name VARCHAR2, p_seqno NUMBER)
as
v_params          gokparm.t_parameterlist;
event_code        gtveqnm.gtveqnm_code%type;
BEGIN
if goksyst.f_isSystemLinkEnabled('WORKFLOW') then
event_code := substr(gokevnt.F_CheckEvent('WORKFLOW',p_event),1,20);

v_params(1).param_value:=p_event;
v_params(2).param_value:='SCT Banner';
v_params(3).param_value:=p_wf_specific_name;
v_params(4).param_value:=to_char(p_seqno);
gokparm.Send_Param_List(p_event,v_params);

end if;
commit;
END;
/
```

Approval – Worklist



Approval - Activity

Home myWeb Resources Campus Store Courses myClasses Faculty Employees Finance Administration Executive Dashboard Administration App Worklist

Home

- myWeb
- Worklist Status Search
- Worklist Search

User Profile

- My Profile
- User Information
- Change Password

Administration

- Business Component Catalog
- Employee Management
- User Management
- Role Management
- Business Events
- Approval Worklist
- Worklist Manager
- Worklist Manager Administration

Please Review and Approve

Employee ID	070170018
Employee Name	Second Little Pig
Position Type	GR Graduate Assistant (OTA & GRA)
Transferred Orgs	395400-UTS-415
Position	00000-00
Job Title	GRA/OTA
Job Effective Date	05/01/2010
Job End Date	
Hours per Day	8.00
Hours per Pay Period	80.00
Monthly Rate	2000.00
Comp Out of State	0
Comments	For Presentation
Request originated by	ralph.arnold@uts.edu
Originator's Email	ralph@uts.edu

Fund Orgs Account Program Activity Percent

10000	00000	000000	000000	000000	000000
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* Please approve or deny this request

☐ Approved

☐ Denied

Complete Save & Close Cancel

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Approval – Launch NOAEPAF Worklist

University of Tennessee - Knoxville Executive Dashboard Administration App Worklist

Home myWeb Resources Campus Store Courses myClasses Faculty Employees Finance Administration Executive Dashboard Administration App Worklist

Worklist

Employee ID: 070170018

Employee Name: Second Little Pig

Position Type: GR Graduate Assistant (OTA & GRA)

Transferred Orgs: 395400-UTS-415

Position: 00000-00

Job Title: GRA/OTA

Job Effective Date: 05/01/2010

Job End Date:

Hours per Day: 8.00

Hours per Pay Period: 80.00

Monthly Rate: 2000.00

Comp Out of State: 0

Comments: For Presentation

Request originated by: ralph.arnold@uts.edu

Originator's Email: ralph@uts.edu

Fund Orgs Account Program Activity Percent

10000	00000	000000	000000	000000	000000
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* Please approve or deny this request

☐ Approved

☐ Denied

Complete Save & Close Cancel

Session ID 0202

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Apply Transaction – NOAEPAF

University of Tennessee - Knoxville Executive Dashboard Administration App Worklist

Home myWeb Resources Campus Store Courses myClasses Faculty Employees Finance Administration Executive Dashboard Administration App Worklist

Apply Transaction

Employee ID: 070170018

Employee Name: Second Little Pig

Position Type: GR Graduate Assistant (OTA & GRA)

Transferred Orgs: 395400-UTS-415

Position: 00000-00

Job Title: GRA/OTA

Job Effective Date: 05/01/2010

Job End Date:

Hours per Day: 8.00

Hours per Pay Period: 80.00

Monthly Rate: 2000.00

Comp Out of State: 0

Comments: For Presentation

Request originated by: ralph.arnold@uts.edu

Originator's Email: ralph@uts.edu

Fund Orgs Account Program Activity Percent

10000	00000	000000	000000	000000	000000
-------	-------	--------	--------	--------	--------

* Please approve or deny this request

☐ Approved

☐ Denied

Complete Save & Close Cancel

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Apply Transaction – NOAEPAF

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Transaction Applied!!!

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IT Perspective - Approval

- Develop Workflow
 - Create Business Components
 - Create Workflow Model
 - Associate Banner Business Event and Workflow to Workflow Business Event
 - Associate Business Event and Workflow to Enterprise Management

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IT Perspective - Approval

- EPAF Setup
 - NTVACAT – Setup Approval Category Codes
 - NTRAVLV – Setup Approval Level
 - NTVAPTY – Setup Approval Type Codes
 - NTRACAT – Associate Approval Type and Approval Levels to Approval Category
- SDE on FTMORGN to associate HR Approvers to Organization Codes (Optional)
- Package to populate EPAF tables

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Benefits

- It's GREEN (paperless).
- The time from request to completion has gone from days to minutes resulting in increased efficiency.
- The data is entered only once.
- What is approved is what is ultimately put into NBAJOBS.

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Lessons Learned

- Do not recreate your current process. Dream Big!!!
- Get the right people in the room.
- You will discover that your business rules need to be better defined.
- Roll it out initially to a pilot group.
- Even with an electronic solution departments are hesitant to give up on printed forms. It is a culture shift.
- Workflows can do most of the work if used in concert with other Banner tools such as EPAF and APIs.

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Proposed Roadmap

- Realize similar benefits with other HR processes
 - Workstudy employee hire
 - Benefited employee hire
 - Separation
 - Job and position change

Questions?



Contact Information

Rohini Ananthakrishnan
DBA/Technical Team Lead
303-871-4738
ranantha@du.edu

Chris Bennett
Assistant Controller
303-871-3044
chris.bennett@du.edu
