Creating an eForm To Change Account Distribution Only

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Table of Contents

Changing Account Distribution Only .................................................................................. 2
Creating an eForm to Change Account Distribution Only

In this topic you will learn how to create an eForm specifically for changing the account distribution of an employee’s salary and benefits.

To Begin the Online Tutorial:

- Click the button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: Main Menu > UofA eForms WorkCenter > Add an eForm

5 Steps to Creating an eForm for Distribution Only Changes

1. Conduct a search to find the existing Person ID.
2. Select the Employee Record.
3. Select an Action.
4. Change the Compensation Information.
5. Submit the eForm for Approval.

1. Once you have navigated to PeopleSoft HCM, Click the Main Menu button.

2. Click the UofA eForms WorkCenter menu.
3. In the Menu on the left hand side of the screen, click the **Add an eForm** link.

4. In this example, it was determined that the employee's salary and benefits should be distributed to Department 360700 instead of Department 360700.

5. **Step 1: Conduct a search for the existing Person ID**

   This search will help to identify the Person ID which already exists and reduce the probability of having multiple Personal IDs for the same person.

   **Important!** If an existing Person ID is found, that ID number should be used on the eForm.

6. Enter search criteria. Include one or a combination of the following options:
   - Person ID
   - Social Insurance Number (SIN)
   - First Name
   - Last Name
   - Gender
   - Date of Birth

   **Note:**
   If searching by Person ID or SIN, do not add other personal information.

   If you do not know the Sin or Person ID, it is recommended to search by first name, last name, and birth date.

7. **Important!**

   All fields within eForms are case sensitive. This means the format you use in your search must match what was used when the employee was originally entered.

   For example, if an employee record was entered using all upper case letters (eg. JOHN DOE) the system will save it that way. When a search is done, you will need to remember that the name was entered in all upper case.

   For this reason, a standard format for Names is to be followed starting May 30, 2017. Enter the first letter in upper case and the following letters in lower case. (eg, John Doe)

   However, for older records you may need to conduct a search using different formats when using the name as search criteria.
8. In this example, Enter the employee's Person ID "0123814" into the Person ID field.

9. Click the **Search** button.

10. The search may take some time to process.

    You may notice an animated icon appear in the top right of the page. This is the processing icon and indicates that the system is processing the information you entered. The icon will disappear when the processing is complete.

    Ensure that this processing icon is gone before continuing to the next step.
11. One of two things will happen.

- **Match Found**
  If a match is found for the search criteria entered, select the appropriate record from the Search Results.

- **No Match Found**
  If the search does not return any matches, the employee is no longer active and you will need to create a Hire eForm to activate the employee. Refer to the topic ‘Rehiring an Employee’ for further details.

![Image of search results grid]

12. When the search returns records, it is important to understand the information that the **Results** grid provides.

The **Has Job** column indicates if the record applies to:
- Active Job (Green Check box),
- Inactive Job (Yellow check box) or
- No Job (blank field).

The **Info** column contains an information icon that, when you click on it, provides more details pertaining to the record. This link is helpful when trying to decide which record to select for the Job Change.
13. **Step 2: Select the Employee Record.**

Choose the appropriate record from the **Results** grid if more than one record is displayed.

In this example, click the **Empl ID** of the record provided.

![Image of Empl ID]

14. **Step 3: Select an Action**

Provided is a list of actions that can be done in relation to Adding an eForm.

To create an eForm for Account Distribution Changes only, Click the **Distribution Only Change** link.

**Note:** you can only make account distribution changes for the Base Compensation (within the Compensation grid) using this specific action. For all other account distribution changes (such as Benefits, Supplementary Pay, etc.) select the ‘Take Other Job Action’ option.

![Image of eForm creation process]
15. **Note:** The eForm ID is assigned at this point and will appear in the top right of the screen.

16. The fields within the **Compensation Information** page will automatically populate based on the record you selected.

17. The **Highlights** feature within eForms, helps identify any changes made within the form.

   To activate the Highlights Feature, click the **Highlights** button.

18. The Highlights button will change to 'ON' and any changes made to the page will be highlighted in yellow.

19. **Important!**
   All information entered from this point forward is Effective Dated.

   **Warning!**
   Because the information is effective dated, if you change the effective date after leaving this page, the system will blank out all of the information entered and you will have to start over.
20. **Step 4: Change the Compensation Information**

Within the **Compensation Distribution** grid click the **Select Combo Code** button.

21. The ChartField Detail fields automatically populate with the information that the distribution is currently being coded to.

To change where the distribution is being coded to, change either the Combination Code field or the ChartField Detail grid information. **DO NOT** change both or the system will get confused.

In this example, the department is being changed.

Enter "360700" into the **Department** field.

22. Click the **Search** button.
23. Ensure the ChartField Information displayed is what you want and click the **Select** button.

24. Click the **Ok** button.
25. The **Combo Code Fields** column will be updated with the changed information.

Press **[Tab]**.

26. You can also choose to change the Percent of Distribution at this time.

However, remember that the total sum of the Percent Distribution column must be 100 before the system will allow you to continue. If you change the percent distribution to less than 100, you will need to add a line to specify where you want the remaining percentage to be allocated. This includes entering the default combo code again, if applicable.

The system will not automatically apply the remaining percentage to the default combo code.

27. After you **[Tab]** out of the last field in the **Compensation Distribution** grid, the fields that have changed will be highlighted in yellow, as long as you have the Highlight feature on.
28. To view what was entered prior to the change, use the Version feature, located in the top right of the page.

Click the View Original Versions button.

29. Note the following changes.

**Compensation Rate** was originally 0.00 and has changed to 5246.20

**Combo Code** column has changed from 000005725 to 000005696 which is also reflected in the Combo Code Fields column.

To go back to the changes to complete the eForm submission, Click the View Current Versions button.
30. Click the **Next >>** button.

31. **Step 5: Submit eForm for Approval**

There are 3 sections within the **Submit Page** that require review before submitting the eForm for approval.

32. The **Action/Reason** section automatically defaults for a Data Change. Ensure the appropriate Action/Reason information is correct.

**Note:** If the Action/Reason you are looking for is not available, leave the fields as the default entries and use the Comments section to record the actual action and reason for the Job Change.
33. The **File Attachments** section provides you the opportunity to add the required attachments to the eForm. Refer to the 'Adding Attachments to eForms' topic for further details.

![Image of eForm interface]

34. The **Comments** section allows you to enter any additional information related to the employee.

When you click on the Comments option a field will open and allows you to enter any comments.

35. At the bottom of the page you can choose one of the following actions.

**Save**
Saves all the information entered but does not submit the form for approval. You can submit the form at a later time.

**Submit**
Saves all the information entered AND Submits the eForm for approval.

36. Click the **Submit** button.
37. The **Finalized** page provides the approval workflow and the stage that the eform is at.

   Within the **Stage** boxes, a link is provided to display either the name of the Approver or "Multiple Approvers" for that stage.

38. Congratulations! You have completed the training on how to create an eForm to change the Account Distribution Only.

   **End of Procedure.**