

Job Assignment Default Labor Change Process Guidelines

For Originators

Business Purpose

The purpose of this process is to initiate, via UAOnline, a change to default labor distribution charges for employees with existing assignments. This process should be used to generate a new labor change (LDCH) job record. Once the process is initiated in UAOnline, the requested change will be applied automatically to Banner each evening through a batch process, and email communications will be forwarded to the appropriate process participants based on the specific information entered into the Electronic Personnel Action Form (EPAF).

For additional information, refer to the paperless job process overview on the project website at http://www.alaska.edu/hr/hr_procedures/paperless_job_processing/.

Documentation Purpose

These instructions cover the entry of labor access for
not need to submit another security access form.

ing links:

[/upload/Fin_HR.pdf](#)

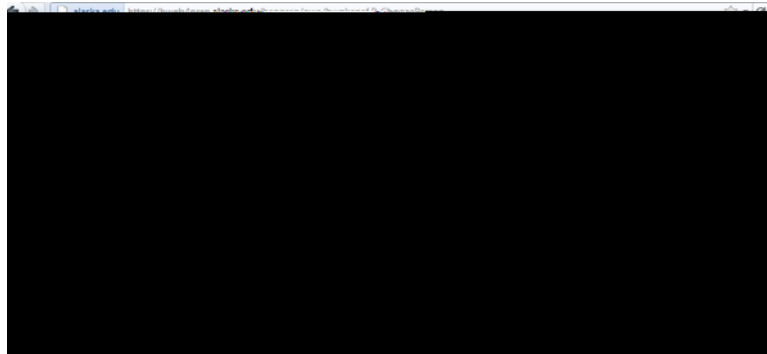
UAF: http://www.uaf.edu/files/uafhr/HR_Access_Request_Form_Rev_8_2011.pdf

UAS: http://www.alaska.edu/oit/sc/about/forms_newdocs/formAdminAccessUnixOracleBannerEDIR.pdf

SW: http://www.alaska.edu/oit/sc/about/forms_newdocs/formAdminAccessUnixOracleBannerEDIR.pdf

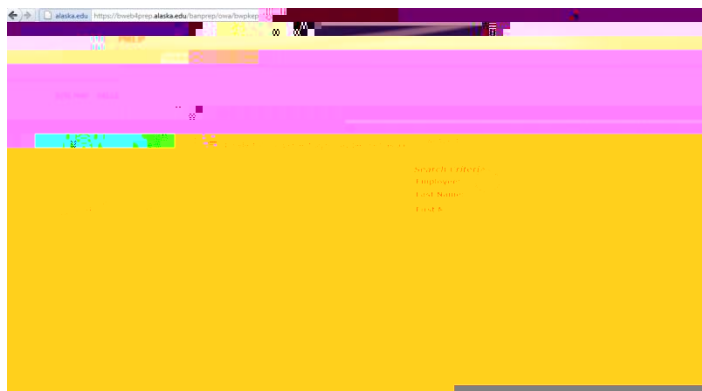
To Start a New Transaction:

- 1) Select New EPAF – the “New EPAF Person Selection” screen will appear.
- 2) Enter the employee ID or choose Search (magnifying glass icon) to search for the employee’s ID.



The “Person Search” screen is presented. Enter a portion or all of the information known about the employee. Select the “Go” button to be presented with a list of employees that match the entered search criteria.

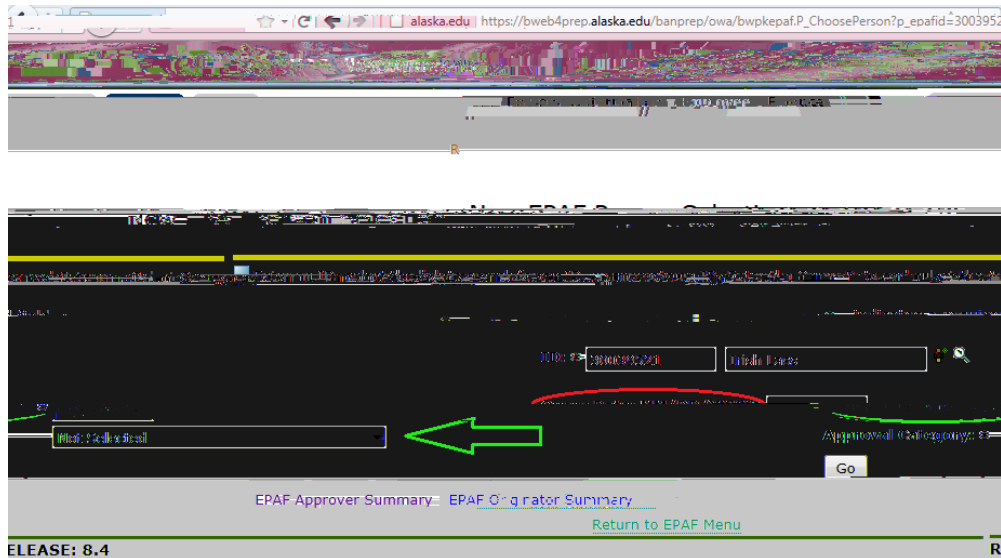
Note: The *Search functionality allows the use of the percent (%) as a wildcard for partial value entry of an employee name, ID, and/or SSN.*



Click on the employee from the list of search results.

Note: Dates entered in any of the following formats will automatically revert to a MM/DD/YYYY format;

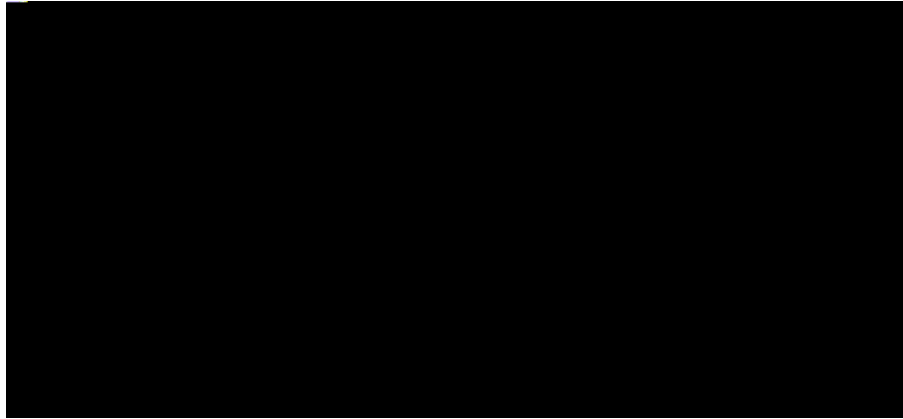
<u>Entry Format</u>	<u>Example</u>	<u>Entry Format</u>	<u>Example</u>
DDMONYYYY	25APR2011	MM/DD/YY	04/25/11
MM-DD-YY	04-25-11	MMDDYYYY	04252011
DDMONYY	25APR11	MMDDYY	042511
MM-DD	04-25	MM/DD	04/25
MMDD	0425		



Note: The value entered into the “Query Date” field will be brought forward to the “New EPAF Job Selection” screen and default into the EPAF transaction as the job assignment effective date for the new job change transaction. The date can be changed at a later stage in the process, if needed.

- 4) Select “Update Labor Distribution LBRCHG” from the “Approval Category” drop down list. Select the “Go” button.

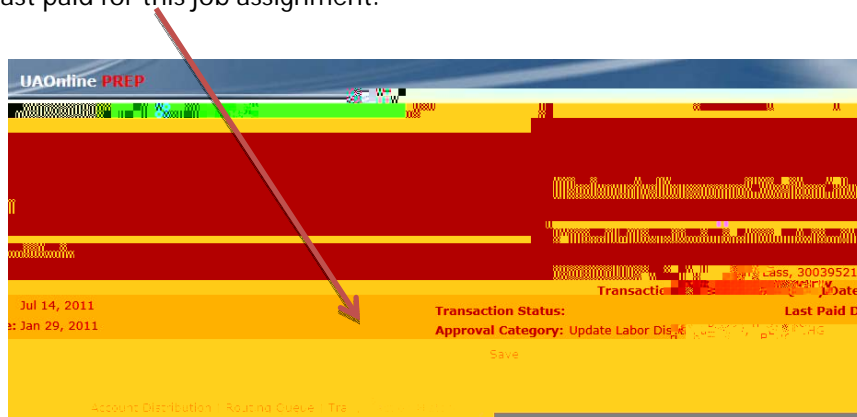
The “New EPAF Job Selection” screen will be displayed listing the employee’s



Note: An “All Jobs” button is present to allow you to see a list of all past and present job assignments for the employee. However, at least one entry under the “Select” column must be made prior to selecting the “All Jobs” button. If no selection is made, you will receive an error message dialog box to make a selection before proceeding.

- 5) Select the appropriate job assignment for the employee, and then press the “Go” button to start the transaction entry.

You will be able to see key information about the employee’s current job assignment set up and when the employee was last paid for this job assignment.



Note: The “Account Distribution,” “Routing Queue,” and “Transaction History” jump links will direct you to the selected area of the transaction.

Selecting the Account Distribution link will display current information about the employee’s job assignment labor distribution set up. The current labor distribution set up will default into the data entry fields and be available for you to change. You can modify the fund and organization codes and their distribution as needed.

Current					
Organization	Account	Program	Percent	COA	Fund
B 101010	16004	1251	4261GA		50.00
B 101010	80039	1251	0166GA		50.00

Note: When you move your mouse over the Fund or Organization fields displayed, the Fund name, main researcher associated with the Fund, and the Organization name will appear on both the "Current" and "New" sections of data. This information can be used to ensure the correct default labor charge set up is selected for the job assignment.

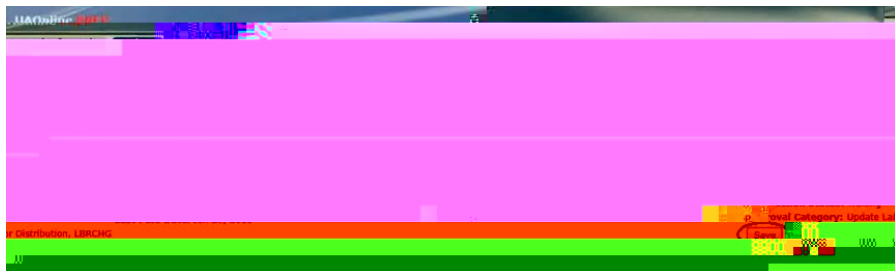
When entering a new account line, you must include a Fund code, Organization (Org) code, and a Percent. However, if a default Org code is set up for a Fund, the default Org and Account (Acct) code will default into the data entry line as soon as you navigate away from the Fund field.

The same action will occur if a default Fund is associated with an Org. You will be able to skip the Fund code entry, and fill in the Org code. As soon as you navigate away from the Org code field, the Fund and Acct code will default in the appropriate fields. The COA (Chart of Accounts code) can be entered, but will also default as soon as you navigate away from the Fund code field. The program code should be left blank and will default when the transaction is saved. You will not be able to change the account or program codes.

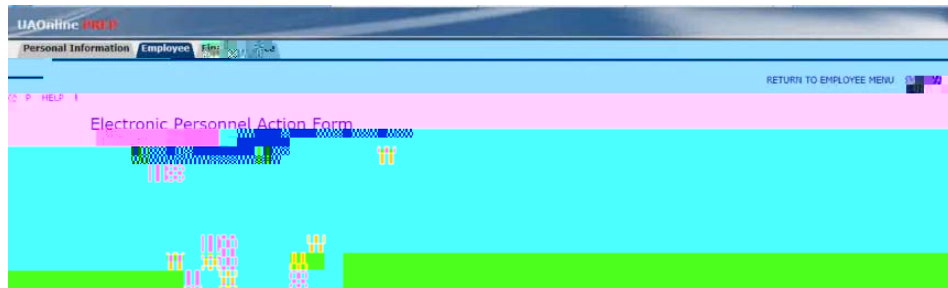
New					
Organization	Account	Program	Percent	COA	Fund
B 101010	16004	1251	4261GA		0
B 101010	80039	1251	0166GA		50.00
B 101010	80039	1251	0166GA		
					100.00
Total:					

Note: For labor records that no longer needed, change the percent to zero; the line can be removed after you save the transaction.

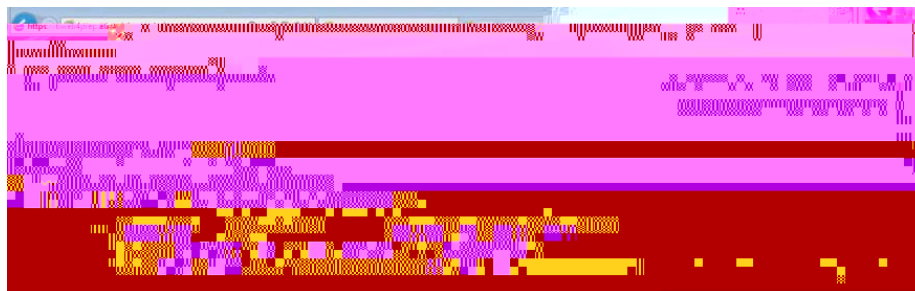
- After completing the desired new labor distribution entry, select the "Save" button to save the transaction



- 7) If any labor distribution lines need to be removed (lines with a zero percent), you can remove these entries by checking the Remove box presented to you after the initial save of the transaction information.



9) A message will be displayed at the top of the page if the transaction was “successfully submitted.”



10) Originators can view the status of any EPAF transaction by accessing the “Originator Summary” page from the “Electronic Personnel Action Forms” menu.

EPAF Originator Summary

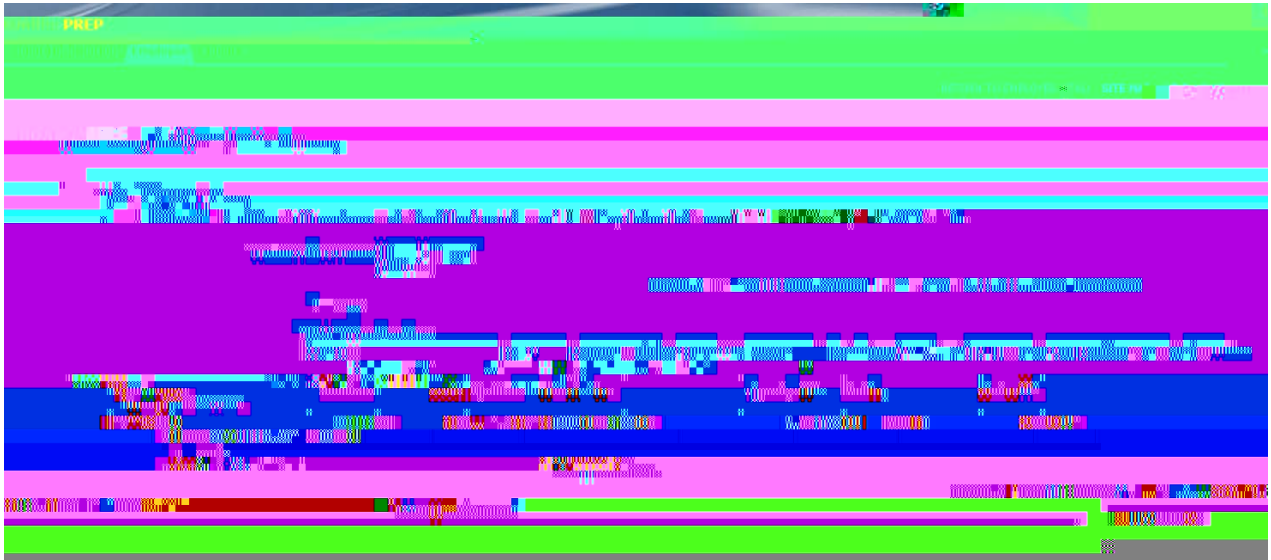
Two tabs are displayed on this page: “Current” and “History.” The Current tab allows you to view the status of your submitted transactions that still require action at some level. The History tab allows you to view historical transactions that do not require further action. Transactions will remain on the History tab for six months.

Current Tab

To search transaction data submitted by you (as the originator) in UALOnline:

On the Employee tab, select:

- Electronic Personnel Action Forms
- EPAF Originator Summary
- Current tab



The Current Tab will display any items which have a Transaction Status of "Waiting." If a labor distribution change transaction has a status of "Waiting," the transaction was saved but not yet submitted. To make corrections or updates to transactions that have a status of "Waiting," see the "Performing Actions on Transactions" section below.

Links Column

The Links column displays some or all of the messages and links listed below:

Comments

The "Comments" link exists for each record and directs you to the Comments page. Two asterisks listed next to the link (**Comments) indicates that comments for the transaction exist. Comments are listed chronologically from newest to oldest on the Current tab and can be added by the originator if desired. Access the comments by

Click **Void** to completely end the transaction.

Click **Update** to make any needed corrections and/or changes to the job information. Note your corrections and/or changes in the Comment box, if desired. Once your changes are made, click **Save** and then click **Submit**. You **must select Save prior to submitting the record.** If you do not save prior to submitting, any changes you have made will be lost. Upon clicking the submit button, the transaction will be ready to be applied to the employee's job assignment as part of that evening's batch processing.

Click **Add Comment** to add a comment and then select **Save**; this action will not remove the transaction from your Current tab.

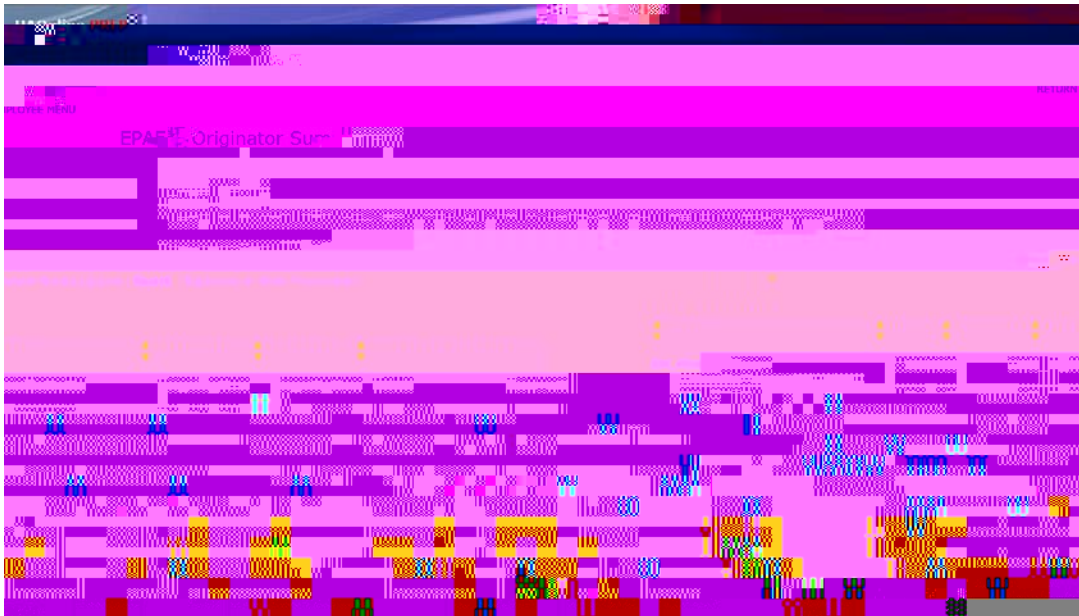
History Tab

The History tab allows you to view historical transactions that do not require further action. Transactions will stay on the History tab for six months. To review the history of a transaction submitted by you (as the originator) in UAOnline:

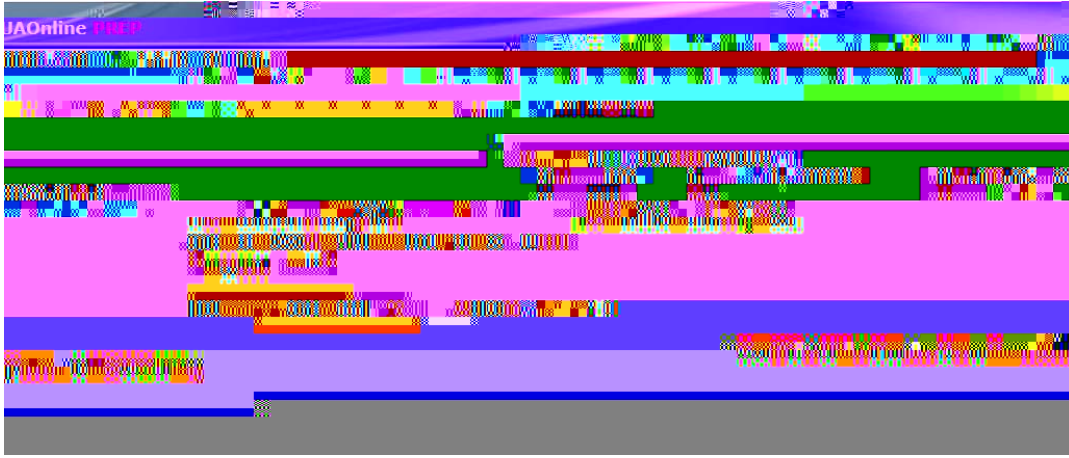
On the Employee tab, select:

- Electronic Personnel Action Forms
- EPAF Originator Summary
- History tab

Under the History tab, you will be able to view all EPAF transactions which you have submitted within the last six months. For detailed descriptions about the transaction statuses, refer to the Transaction Status listing at http://www.alaska.edu/files/hr/ea_trans_statuses.pdf.



As long as a record is at an Approved status, you may return the transaction to your queue for correction. To do so, click on the employee's name in the EPAF Transaction list on the History tab. The EPAF Preview form will open.



Click on **Return for Correction**. The EPAF Preview will reload and acknowledge that the transaction was successfully completed. You may now choose "Void," "Update," or "Add Comment." If you choose Update, make the necessary changes, Save, and then Submit the record.

Click **Void** to end the progress of the transaction. The status will change to Voided. Add a comment stating the reason for voiding the transaction.

When a transaction is in a "Completed" status, it has been applied to the employee's job assignment in Banner. You may see the **Cancel Transaction** option in the EPAF Preview. This option will not reverse or allow you to cancel a job submitted in error and should not be selected. If the button is selected, the Transaction Status will change to "Canceled" even though the transaction records have been applied in Banner. You can still add a comment for the transaction to clarify the record's status. To add a comment for a cancelled transaction, choose the [Add Comment](#) button on the EPAF Preview page.

