

General Information

Online EA User Manual

Table of Contents

Purpose..... 1

Scope..... 1

How to Use This Manual 2

General Description of the Online EA Application..... 2

Security 3

Purpose

The On-Line Employment Action (OLEA) application serves several purposes:

- Improve the accuracy of the data provided on the EAs as the current data used to prepare an EA will be selected directly from HRS.
- Decrease the amount of paper generated on campus for employment and pay processes. This in turn will reduce paper costs and the amount of storage needed to keep the information.
- Reduce the time it takes for an employee's assignment to be entered or updated in HRS because the routing is electronic (with email notifications) and delegates can be assigned when approvers are unavailable. This in turn will allow for more timely and accurate pay to the employee. This could possibly reduce the number of assignment checks and overpayments.
- Provide the ability to track an EA's progress through the approval and processing actions. Departments can immediately know where an EA for their employees is in the approval process.
- Increase the integrity of the data in HRS since the data will eventually be processed into HRS via a mechanical, batch process.
- Provide convenience to departments by allowing them access to their employees' employment action records by using the imaging system. There will be no need to keep a copy of the EA in their office and will reduce their need for storage space. The EA will be conveniently available at their computer.

Scope

The Online EA (OLEA) application is intended for use by all the OSU campuses. It should be used for all employment actions including new employees to HRS, rehires, separations, and changes to current employees (rate changes, FTE changes, leaves, etc.).

This application will provide for various notifications within the process to the appropriate offices, such as Board Report for Personnel Actions to be included on the Board Letter.

OLEA is an electronic application from the standpoint that the online EA will be used to

- originate as an electronic document to be used as an EA;
- electronically route the EA through various approval steps for approval or rejection;
- electronically route the EA to Federal Work Study (FWS) for review and approval, as determined by application rules;
- electronically route applicable faculty EA forms to the Office of the Provost;
- electronically route the EA to Human Resources Partner Services (HRPS) or Human Resources Employee Services (HRES) as required by unique EA situations for requisite review and/or processing;
- electronically route the EA to Payroll Services (PS) for final review and approval;
- electronically route the EA to a Board Action table for personnel actions requiring Board approval;

- electronically generate transactions to create assignments in HRS (although some input may be manual); and
- create an electronic document to be incorporated into the HR imaging system.

How to Use This Manual

This manual is intended to help the user complete the various EA tasks. It can be read from front to back to gain a complete understanding. Additionally, it can be used as a reference to determine how to complete a particular task. The Table of Contents is interactive so the user can move directly to the instructions for the task he/she wishes to undertake. For example, if the user wishes to learn how to move through a particular OLEA screen, he/she may click on that item in the Table of Contents and jump right to the instructions for that screen.

This manual not only guides the user through the particular OLEA screens, it also lists the various types of employment actions and how the user should begin and progress through the EA process.

A Glossary of Terms is also provided to help the user understand the HRS/EA terms that are used throughout this manual.

This manual will begin as a work in progress to be updated as the abilities in the OLEA are completed and available for use.

General Description of the Online EA Application

The Online EA (OLEA) application is a web application that was developed based on the concepts of the WebFOCUS Separation EA and the Online Requisition hierarchy. The idea is that as much information as possible will be pulled from HRS streamlining the user input process. The use of the hierarchy in the Online Requisition system avoids duplication of effort in developing the approval process for the OLEA.

The OLEA consists of two applications – the Online EA application itself, which is used to actually prepare the electronic EA, as well as, route and approve it; and the Work Item Routing application, which is a general application designed to support multiple applications to create Predefined Routings, assign delegates, and manage email notifications. The Online EA application is the first application to utilize the Work Item Routing application.

The OLEA is accessible via a web browser at <http://eaforms.okstate.edu/>. The Work Item Routing application is accessible via “Routing Application” links in the OLEA left navigation bar on the OLEA sign in page and individual OLEA pages. Clicking the “Routing Application” link will open a new browser window or tab, depending on your browser configuration, for the Work Item Routing application.

The OLEA process begins with a user accessing the application via a secure web page (<http://eaforms.okstate.edu/>) and signing on to the application using his/her O-Key email address, or username, and O-Key password. Once successfully signed in to the application, a user is presented with three options: My EA Forms, Create EA Form, and View EA Forms.

The My EA Forms and View EA Forms are both options to view existing EA forms. The My EA Forms page automatically selects EA forms that are currently associated with the signed-on

user in one of four categories: Awaiting My Approval, Need Routing, In Routing, and Processed. Up to five entries will be displayed for each category. If more than five entries are displayed, a View All link is provided at the bottom of each table to view all EAs in that category. Individual forms are displayed by clicking the specific entry in the table.

The View EA Forms provides the user options to select, or filter, EAs based on various criteria. In both the My EA Forms tables and View EA Forms results table, the data can be sorted by clicking on the orange column heading. Click the first time and the table is sorted in ascending order based on the data in the column. Click on the column head a second time and the sort is changed to a descending order. Only one column at a time can be used for sorting the data.

In the View EA Forms, as well as all other functionality within the Online EA application, the user is restricted to viewing data within the department s/he has been authorized based on the HRS department Value-Based Security (VBS).

The Create EA Form selection is the heart of the OLEA and is used to create an EA form for both new and current employees. The application is intended to fulfill all the requirements of the paper EA form as well as the Leave of Absence form.

The originator enters the Campus-Wide ID (CWID) of the employee for whom the action is being prepared and the date of the action. The application will retrieve data from HRS and the originator will complete the information needed to prepare the EA.

Once the OLEA is completed, the originator establishes the approval routing. This routing can be selected from a set of predefined routing entries or individually entered depending on the scenario. The OLEA is sent through the approval process where it can be approved and sent on or returned to the originator, which cancels the action.

When the approval routing is completed, the OLEA progresses to the process routing, which is automatically included based on the type of EA form being processed. The process routing includes stops such as Office of the Provost (Academic Affairs), Federal Work Study office, HR Partner Services (HRPS), HR Employee Services (HRES) and Payroll Services (PS).

At the end of the process routing is Payroll Services, where staff will review the document against HRS data and determine if the action can be automatically processed by application generated HRS transactions, manually processed, or held to be recalled for action at a later date (crossing fiscal years, for example).

The terminal location for all actions processed by Payroll Services is the imaging application where departments can view the processed EAs.

A Board reporting capability is also built into this application.

Security

HRS department Value-Based Security (VBS) controls access to the OLEA application and within the application. Any user of the OLEA, individuals who create, review, or approve forms, must have an operator ID with access to HRS and access to the division/departments for which they have EA responsibilities.

Additionally, any person defined as a department head within the AIRS departmental hierarchy system must have an HRS operator ID and have access to the Online EA application and his/her

department within the HRS VBS. Persons identified as department heads in the AIRS departmental hierarchy are required participants in the OLEA. If a department head is not included in the form approval routing, an email will be sent to the department head notifying them that an EA form has been prepared for a person within his/her department. Routing cannot be applied to an EA form if the department head does not have access to the OLEA application.