



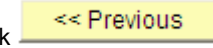


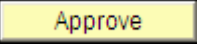
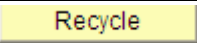
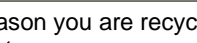
Learning Summary – Research Approver Smart Form

<p>HR Smart Forms are located in the PeopleSoft Human Capital Management Production environment. Select the HCM and HR Smart Forms link on the AIS website at www.ais.ualberta.ca</p>	<p>Sign On Links</p> <ul style="list-style-type: none"> ▪ Bear Tracks ▪ Campus Solutions ▪ ePayment ▪ Financials and eTRAC ▪ HCM and HR Smart Forms ▪ HERO 	<p>Help Resources:</p> <ul style="list-style-type: none"> • For assistance with your CCID/password, contact AICT at 780.492.9400 • For PeopleSoft Support, contact AICT Helpdesk helpdesk@ualberta.ca 780.492.9400 • PeopleSoft is available Monday through Saturday from 7:30 am–7:00 pm MST <p>Access to the PeopleSoft Databases:</p> <ul style="list-style-type: none"> • You must use your CCID and Password to log on to the PeopleSoft databases.
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Approve a Smart Form	How to approve a Smart Form that has been routed to you for approval.
Navigation: Worklist > Worklist >	

<p>Accessing your Worklist</p>	<p>When an HR Smart Form is processed with your Research speedcode it will be routed to your worklist for approval. There are two ways to access your worklist.</p> <ol style="list-style-type: none"> 1. Click the link embedded in the email you received notifying you a form has been routed to you for approval. Once you enter your CCID and password you will be taken directly to the form requiring approval. 2. Sign on to the HCM PeopleSoft application using your CCID and password. <ol style="list-style-type: none"> a) Click on the Worklist menu item on the left hand side <div style="text-align: center;">  </div> <ol style="list-style-type: none"> b) Click on Worklist again <div style="text-align: center;">  </div> <p style="text-align: center;">OR</p> <ol style="list-style-type: none"> a) Click the Worklist link at the top right of the screen <div style="text-align: center;">  </div> <p>The list of forms that require your approval will be displayed. Select a form by clicking on the blue link.</p>
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<p>Step 1 – Review the Form</p>	<p>Review the form to ensure that you approve the transaction, effective date, salary etc. Depending on the type of form, Hire, Job Change or Change Employment Status, the pages will vary.</p> <p>To proceed to the next page of the form click .</p> <p>If you need to go back to a previous page click .</p>
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<p>Step 2 – Approve, Recycle or Reject</p>	<p>Click  if you authorize the transaction identified on the form.</p> <p>Click  if you have questions or if changes are required on the form. You must enter the reason you are recycling the form in the comments section. Recycled forms go back to the originator.</p> <p>Click  if you do not want to approve the form. This will stop all processing of this form. If you click on this button by mistake a new form will need to be completed.</p>
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Learning Summary – Research Approver Smart Form

	Use Recycle if you have any questions about the form or if changes are required.
Step 3 – Finalize form	You will be asked if you are sure that you want to approve the form. Click Yes to proceed. Click No if you wish to return to the form to make any changes or to review.
Step 4 – Form Submission	This final page advises you the form has been submitted and where it has been forwarded to for further processing. Originators of the form will receive email notification for each step in the process.
View a Smart Form <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> Use to view any forms that that have been submitted with your Research speedcode. </div>	
Navigation: Department Self Service > ePAF Home Page > View an ePAF	
ePAF Search	On the ePAF View All page, enter any of the following information that you have. <ul style="list-style-type: none"> • eForm ID# If you know it • Employee ID # OR <ul style="list-style-type: none"> • Leave the fields blank to return all forms you have security to view. Click << Search to retrieve the ePAF Form(s) from the database.
Step 1 – Select a Form	If there is only one form returned, it will open automatically. If there is more than one form, a list will be produced. From the list select the form you wish to view by double clicking on any of the fields. If no records are returned it means the system did not find any forms matching the criteria you entered.
Step 2 – View a Form	You can view the form and the associated transactions that were performed. Depending on the type of form, Hire, Job Change or Change Employment Status, the pages will vary. Click Next >> to proceed to the next page of the form. Click << Previous if you need to go back to a previous page of the form.
Step 3 – Review Form History	The history of the form is useful for tracking or troubleshooting: <ul style="list-style-type: none"> • Original Operator – Who started the form along with the date and time • Last Operator – Who last approved the form along with date and time • Next Approver (if any) – Who is the next person that needs to approve the form. It also has a transaction log that shows date, role name, user id, user name, form action and form status which are useful if you need to track or troubleshoot a form. Click Next >> If you want to check for any form errors Or Click << Previous to return to the last page of the form.
Step 4 – Review Error History	This final page shows any form errors that may have occurred during the processing of the form. Click << Previous to return to the Form History Page Or Click Close to exit out of the form and return to the ePAF Home Page Click << Search to search and view another form.