Everest electronic Personnel Action (ePA) Form Approver Guide

The University of Alabama
Payroll Services

Everest, Powered by K2® is being utilized for several different UA processes, but this guide is specifically for the Payroll electronic Personnel Action (ePA) form process.

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ACCESSING ePA FORMS

Email Notifications
Approvers will receive an email notification when an ePA form is ready for review and an escalation notice will be sent if no action is taken within 3 days.

Email address: k2usrp@fa.ua.edu

Subject: Personnel Action Form Notification

Body: Identifying elements (known as the FOLIO) which are derived from the ePA form:

Last Name-CWID-Employee Class-Payroll ID-Fund-Organization-Account-Position Number-Begin Date-Transaction Number

Note: Termination type ePA's may be missing certain Folio elements.

Link: Provides quick access to the form. When prompted to log in, use *my*Bama credentials.

Signature: EVEREST, Powered by K2® | Financial Affairs Information Technology | The University of Alabama

myEverest
In addition to email notifications, approvers have access to myEverest—a combined Worklist and Tracking Tool. MyEverest allows approvers to not only action their outstanding ePA's, but also to *track their progression throughout the remainder of the approval process. Once an ePA is actioned from the myEverest Worklist, the email link is no longer accessible, and vice versa—once an ePA is actioned from the email link, the Worklist task is no longer accessible.

*Approver access to tracking tool is by request only.

ACCESSING myEVEREST
1. Log in to www.mybama.ua.edu
2. Click the Employee tab
3. Navigate to the Payroll Services section on the left side of the page
4. Click the myEverest link beneath the Everest electronic Personnel Action Forms heading
5. When prompted to log in to Everest, use *my*Bama credentials

myEVEREST WORKLIST

If there are more than 20 items on the Worklist, a "Load More" (e.g. [Load 20 More]) link will appear at the bottom of the list. Click the link until all transactions are displayed.

Worklist Elements
The worklist is divided into 4 columns.
1. Activity Name: Identifies the current approval step in the workflow
2. Folio: Name assigned to the transaction consisting of identifying elements which are derived from the ePA form
   Last Name-CWID-Employee Class-Payroll ID-Fund-Organization-Account-Position Number-Begin Date-Transaction Number
   Note: Termination type ePA's may be missing certain Folio elements.
3. Task Start Date: The day or time a task was assigned to the approver
4. Workflow Name: Identifies the K2 process
   - If an approver is involved in multiple K2 processes this will be helpful in identifying the form type. For example, the Workflow Name for this process is EPA.Main.

Sorting Worklist Items
The Activity Name, Folio, Task Start Date and Workflow Name columns may be sorted alphabetically by clicking the column heading.

Searching Worklist Items
To search for a specific worklist item(s), enter the search criteria (i.e. last name, CWID, employee class) in the text box to the right of the Search box (upper right corner of worklist). Items matching the search criteria will be highlighted in yellow. Clear the search criteria and press Enter to return to the full worklist.

Viewing Worklist Items
To open a form, double-click on the row or click the arrow on the right side and then click Open Form. When prompted to log in to Everest, use *my*Bama credentials.

Refresh
Click the Refresh button ⟳ (upper right corner) often to clear items that have been actioned and to receive new items.
Note: Worklists automatically update every five minutes.

myEVEREST TRACKING TOOL (Approver access is by request only)

Search/Start Electronic Personnel Action Form Buttons
Click the EPA.Main bar for these buttons to appear. The Search Electronic Personnel Action Form button is for University Route Approvers only, e.g. Human Resources. The Start Electronic Personnel Action Form button allows Originators to begin new forms without toggling between *my*Bama and myEverest.

Workflow Instances
To track a form, click the EPA.Main bar and all <u>active</u> ePA's an approver has actioned within the last 90 days will appear in the Active Workflow Instances table. Forms outstanding for longer than 90 days cannot be tracked. See Active Workflow Instances section below.

Active Workflow Instances
Ten ePA's per page will be displayed. If more than ten ePA's are active, use the page arrows at the bottom of the table to display more forms. Each page may be sorted alphabetically by clicking the FOLIO column heading.
1. Click on the row of a form to track its progress
    a. The Current Activity box below the table will display the approval step, e.g. Department Route, Principal Investigator, etc.
    b. The Assigned To box will display the myBama username of the current approver. If the form is in a University Route, it will display the name of the office, e.g. Academic Affairs, Budget Office, Human Resources, etc.
        i. Exception, Payroll Input will always display K2LDAP:CBLAKNEY, but tasks are shared among all Payroll Input staff
        ii. When the Assigned To box displays Complete, the form has been loaded into Banner. It will move to the Completed Workflow Instances side after the Benefits Office and Payroll Processors have an opportunity to review.

Completed Workflow Instances
Ten ePA's per page will be displayed. If more than ten ePA's have been completed within the last 90 days, use the page arrows at the bottom of the table to display more forms. Each page may be sorted alphabetically by clicking the FOLIO column heading.

Activity Instances & User Performance Grid
Once an ePA has been selected from either the Active or Completed Workflow Instances table, a pie chart will appear with more details about the form. Click on a piece of the pie, and the details will appear in the User Performance Grid to the right of Activity Instances.

Example: Click the Department Route section of the pie chart to display the usernames of the departmental approvers who took action on the form.

REVIEWING/ACTIONING ePA FORMS

Employee Information
Depending upon the purpose and employee type, certain informational fields will be displayed.

Assignment Information
Depending on the ePA Purpose, this section may display FROM information only, APPOINT, REAPPOINT, OR CHANGE TO (TO) information only, or both. The Assignment FROM and TO sections include the Position, Org, FTE, Salary, Date and Labor Distribution information.

Attachments
The Attachments section will be expanded if the ePA includes any additional information for review.

Build Approval List/Request Route
The originator will either build or select a saved route for departmental approvers. Forms are automatically routed to the appropriate PI(s) and CGA(s) based on the Fund numbers entered. The originator should also check Contract and Grant, Budget, or both, depending upon the funding source(s) and select the appropriate University Route.

Comments/Action
After reviewing a form, approvers may add comments. Comments will be saved in the APPROVAL HISTORY for all other approvers to view. Also, all comments will be saved on the form and the final version will be stored in UA's imaging system. After making necessary comments, the approver may either Approve the form or return it to the originator for a Rework. Once a form is approved and submitted, it is routed to the next approver. An approver may save a copy of the form by creating a PDF before submitting.

Creating PDF's
Any person in the approval queue may create a PDF of the form to save for future reference. The form will be saved in its current state. The Create PDF button is located in the lower right corner of the form. Click the button, and it will turn from white to green. When the button turns white again, the PDF is ready to view. To view the PDF, click the drop-down arrow on the right side of the PDF HISTORY bar and then click the green link. If multiple PDF's have been created throughout the approval process, the most recent version will appear last on the list.