



HCM Newsletter

October 2016

From the Editor

Hope you have been enjoying Boston's "Fall/Autumn" season colors. The focus of this issue of the newsletter is the "Training Resources for Human Capital Management (HCM) module". In addition to weekly instructor-led-training on HCM topics available to all BU staff, there are four types of HCM training documents available at the website <http://www.bu.edu/tech/support/buworks/help/hcm/>

These are

1. Process Guides
2. Work Instructions
3. Quick Reference Guides
4. Videos

Monthly HCM newsletters sent out from the BUworks training team discuss FAQs regarding a specific OM (Org. Management) or PA (Personnel Actions) topic. They also provide Tips & Tricks and dates for the upcoming HCM instructor-led-training. To access the archive of previous HCM newsletter issues please visit

<http://www.bu.edu/tech/support/buworks/newsletters/hcm-newsletter-archive/>

Monthly payroll calendars for 2016 can be accessed at

<http://www.bu.edu/cfo/comptroller/departments/payroll/resources/monthly-payroll-calendars/>

Please keep in touch and feel free to email me at srao22@bu.edu with your comments or suggestions.

Shuchita Rao

(HCM Trainer)

News: Managers can now personalize their Universal Worklists (UWL)

The universal worklist available to managers for approving/rejecting tasks can now be personalized to change display features. Personalizing your worklist view allows you to add, remove, and re-order columns displayed, as well as, change the default sort, and customize select features. For instance, new columns (such as Org Unit and Master Cost Center) can now be added to the existing display and existing columns can be removed if no longer needed. A Worklist User Guide located under "Related Links" in the Worklist tab provides instructions to "UWL Personalization" and more.

The screenshot shows the Boston University HCM system interface. At the top left is the Boston University logo. Below it is a navigation bar with the following tabs: Home, Employee Self-Service, Organizational Chart, Finance, ACCT XWalk, BUID Translation, Reporting, Worklist (highlighted with a red box), and WebGUI. Below the navigation bar is a blue sidebar with a "Related Links" section containing a link to "Help – Worklist User Guide" (also highlighted with a red box). The main content area shows a "Tasks (34 / 35)" tab, with "Alerts" and "Notifications" tabs also visible. Below the tabs is a "Show:" dropdown menu set to "New and In Progress Tasks (34 / 35)", followed by a "Select a Subview..." dropdown menu and an "All" dropdown menu.

FAQs on Training Documents

1. Where are the training documents located and organized?

- A. The training documents are located at <http://www.bu.edu/tech/support/buworks/help/hcm/> and organized in sections as follows. To see all the training documents under a specific section, click on the Green Plus icon.
- BUworks Portal Basics introduces you to the basics of the BUworks Central portal.
 - The Identity Access Management project is about the provisioning/de-provisioning of accounts.
 - Employee Self Service is the gateway to the forms related to Benefits & Pay available to Boston University faculty and staff.
 - Manager/Payroll Coordinator Resources such as Org. Management and Personnel Actions.
 - Hiring Staff/Faculty
 - Time Related Instructions for Exempt/Non-Exempt Employees, Managers and Timekeepers
 - Nakisa/PPOSE tools for displaying Organization Chart for Boston University Employees
 - Worklists
 - WebGUI

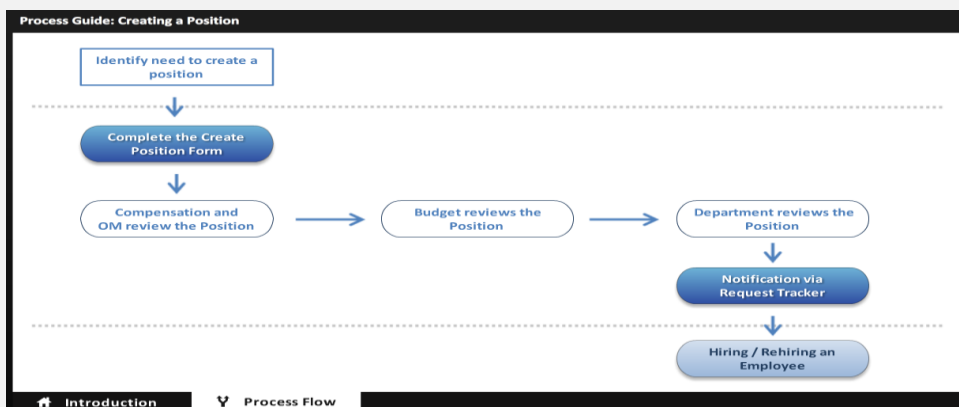
B. What is a process guide?

- A. A process guide gives a visual picture of the steps involved in any OM (Org. Management) or PA (Personnel Action) task in the form of a flow chart. There are two tabs, Introduction and Process Flow located at the bottom of a process guide.

The Introduction describes the process and the advantages of creating a position and other relevant information.

The screenshot shows the 'Introduction' tab of a process guide titled 'Process Guide: Creating a Position'. It is divided into three columns: 'Description', 'Advantages', and 'Introductory Videos'. The 'Description' column explains that a new position is created when needed and that the hiring process begins once approved. The 'Advantages' column lists two points: facilitating workload management and ensuring compliance with the 'one person to one position' rule. The 'Introductory Videos' column features a button for 'Introduction to OM and PA'. Below this, the 'Relevant Information' section has a button for 'Human Resources'. At the bottom, there are two tabs: 'Introduction' (selected) and 'Process Flow'.

The Process flow shows a sequence of steps needed to complete the task.



C. What is a work instruction document?

A. Work Instructions describe the steps for any OM/PA action (Example: OM action: Create a position)

The screenshot shows the BUworks Online Help page for the 'Work Instruction - New-Create_Position_Staff_Exempt_NonExempt'. The page is titled 'Introduction' and 'Process and Trigger'. It provides instructions on how to create a Staff Exempt or Non-Exempt position. The 'Prerequisites' section lists a bullet point: 'Check your Org Structure to determine if a similar position to the one you want to create already exists. If this is the case, obtain the Position ID.' The 'Menu Path' section states: 'Use the following menu path to begin this transaction: BUworks Central Portal → Manager Self-Service or Payroll Coordinator → Organization'. The 'Tips and Tricks' section lists two bullet points: 'The forms do not have a save function that allows you to leave the form and complete at a later time. Best practice is once you start the form you need to complete the form.' and 'If you are unsure of what Job Code to enter use 20001554 (To Be Determined, TBD). Compensation will assign the correct job code when they see the position form via Workflow approval.'

D. What is a Quick Reference Guide (QRG)?

A. A Quick Reference Guide also serves the purpose of giving brief instructions on the task. Here is an example of a Quick Reference Guide on the “Create Position” task.

The screenshot shows a Quick Reference Guide (QRG) titled 'Quick Reference Guide - Org Management Completing a Create Position Form (page 1 of 7)'. The guide is divided into three main sections: 'About This Guide', 'Prior to Creating a Position', and 'Looking up a Position in Your Org Structure (cont.)'. The 'About This Guide' section explains that the Create Position form is used to create a position that doesn't currently exist within the organizational structure. The 'Notes' section states that on the Create Position form, there are two options for creating a position: 'A. Create from Job' and 'B. Copy from Position'. The 'Prior to Creating a Position' section lists two bullet points: 'Contact Central HR to work with them on details for the position you want created.' and 'Keep in mind Workflow and timing of your Create Position form submission. Actions on the Personnel Administration (PA) side often require an OM position form first to be approved. Avoid waiting until the last minute to complete a Create (or Maintain) Position form.' The 'Looking up a Position in Your Org Structure (cont.)' section lists two numbered steps: '6. Refer to Account Assignment Features to review and mark down existing, active positions for the Org Unit you selected, including the Position ID and Holder (i.e. employee) of the position. This will help should you opt to use Copy from Position later.' and '7. Click the Close button to exit. You are now ready to create the position.' The 'Accessing the Create Position Form' section lists three numbered steps: '1. From the BUworks Central portal, click your Manager Self-Service or Payroll Coordinator tab.', '2. Click the sub-tab of Organization.', and '3. From Organizational Management Actions, click the link labeled Create Position. The screen refreshes and the Create Position form appears, shown below.'

E. What are the videos that are available in the HCM training module?

A. There are three videos that are currently available in HCM training.

1. An introductory video to BUworks Central portal.
2. A video that shows how an employee can request for an absence (sick/vacation).
3. A video for manager tasks (such as approving/rejecting employee requested absence, applying for an absence on behalf of an employee and assigning a substitute for worklist actions).

Upcoming Training Sessions (Sign up at <http://www.bu.edu/tech/training>)

1.5 hour long instructor-led HCM trainings that provide an overview of BU's Enterprise structure and include a demonstration of

1. Org. Management (OM) actions such as Create/Maintain Position & PA form, Employee Position Update (EPU)
2. Concept of Workflow and tracking submitted requests
3. UWL (Universal worklist) and the newly added personalization features

4. Org. Chart display tool NAKISA and SAP transaction PPOSE

Workshop Title	Location	Date & Time
OM (Maintain Position) & PA form (Employee Position Update: EPU)	Room L1110(11th floor "L" building, 72 E. Concord Ave, BU Med. Campus	Tuesday, Oct 25 at 3PM
OM (Maintain Position) & PA form (Employee Position Update: EPU)	Room HR244, 25 Buick St, 2 nd floor	Thursday, Oct 25 at 10AM
Nakisa/PPOSE (Org. Chart Display)	Room L1110(11 th floor "L" building, 72 E. Concord Ave, BU Med. Campus	Tuesday, Nov 1 at 3PM
HCM Overview Training	Room HR244, 25 Buick St, 2 nd floor	Tuesday, Nov 8 at 3PM
HCM Overview Training	Room L1110(11 th floor "L" building, 72 E. Concord Ave, BU Med. Campus	Tuesday, Nov 15 at 3PM

To register for a training, please visit <http://www.bu.edu/tech/training>
Hope to see you soon!