Smartetools

SmarteHR Personnel Change Requisition

User Guide

Revised 10/12/2017

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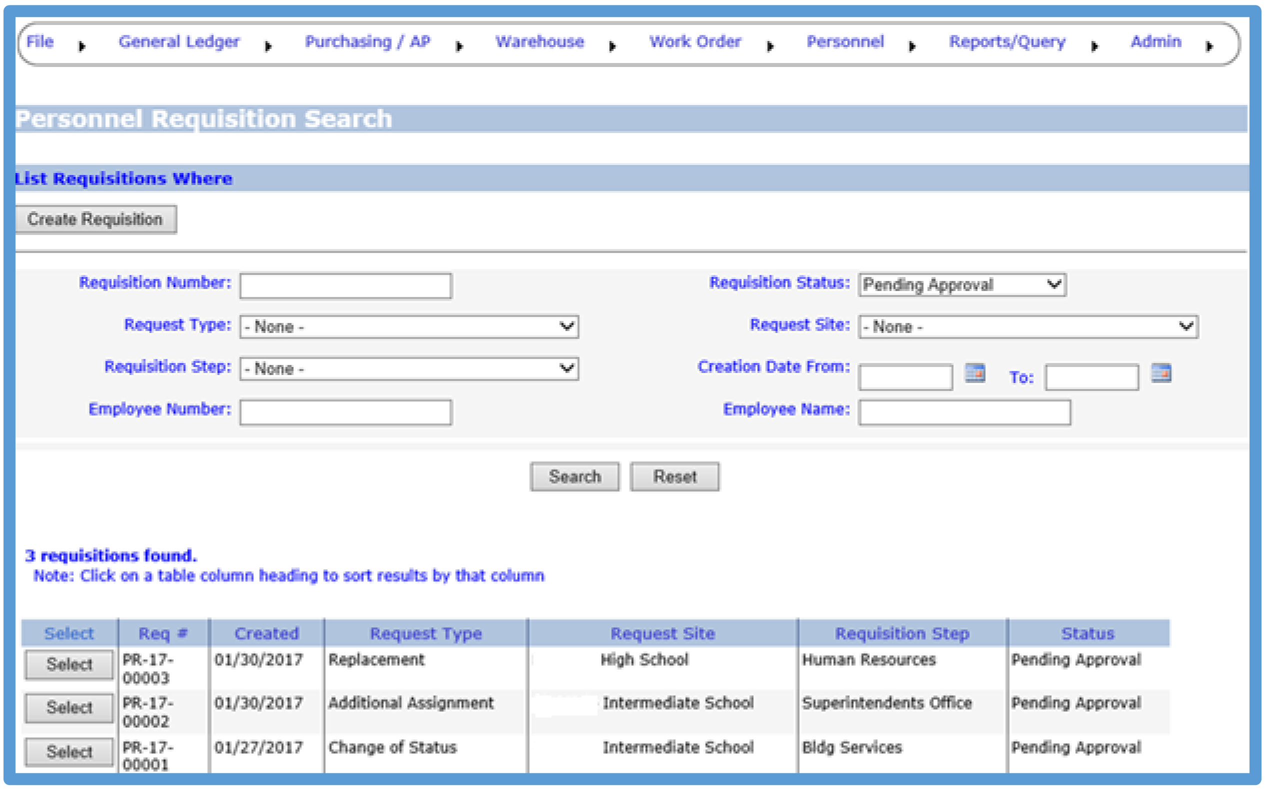
PERSONNEL CHANGE REQUISITION (PCR)

The Smartetools on-line Personnel Change Request is a web base form that will replace the existing form currently used by the district. The new web base form will allow you to electronically create, route and approve all request types, as well as, perform additional functions such as adding notes, attaching files and tracking requisition movement, etc.

PERSONNEL REQUISITON LIST

The personnel requisition listing page, as shown below, is used to locate and list existing personnel requisitions.



During the life of a requisition it can have one of the four statuses listed below:

<u>New (not routed)</u>: requisition has not been routed by the originator for approval.

<u>Pending Approval</u>: requisition has been routed from the 'New Requisition' step and is waiting for approval and final processing.

<u>Processed</u>: requisition has been completed and closed.

By default, the listing page is initially displayed with all requisitions that have a **'Pending Approval'** status. For originators, this is a list of the requisitions that have been created and are still in the process of being approved and completed. For approvers, the requisitions listed are those that are waiting your approval and routing. The **'Current Step'** column indicates the current location of the requisition.

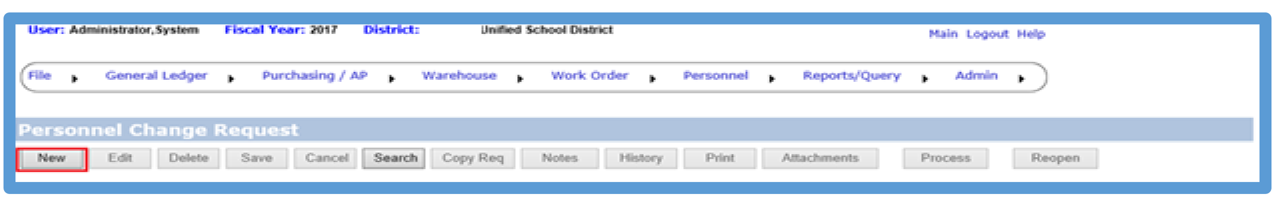
The requisitions that appear in the list can be controlled by specifying one or more additional search options as follows:

1. **Requisition Number:** the PCR number assigned to the requisition
2. **Request Type:** type of request
3. **Current Step:** the current location of the requisition in the approval path
4. **Creation Date:** the date the requisition was created
5. **Status:** requisition status
6. **Site:** the site that created the requisition

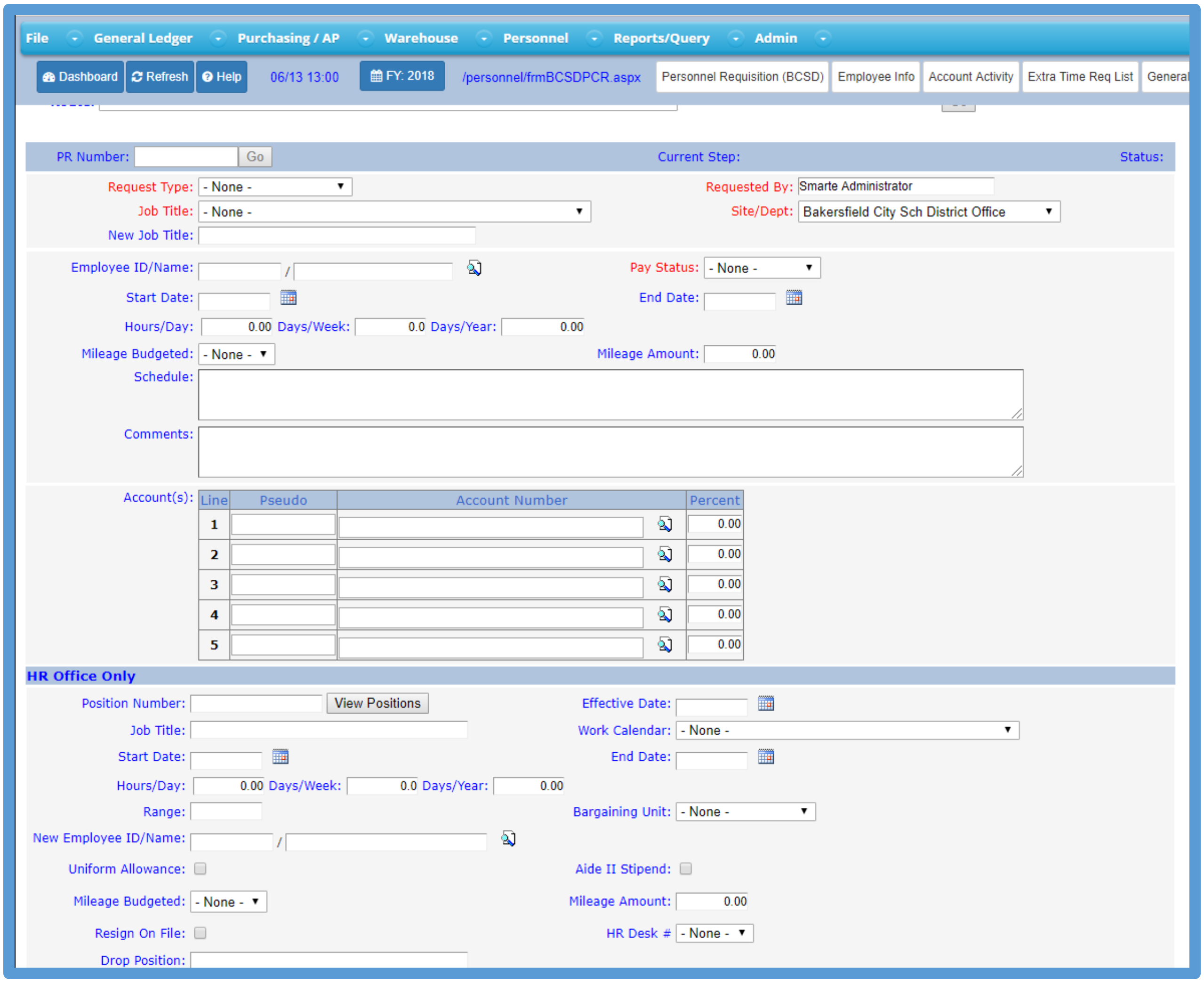
To clear the search criteria and begin a new search, Click the **'Reset'** button.
To select and work with a requisition, click the **'Select'** button next to the requisition number. This will display the selected requisition and allow you to edit, route, print, and perform other functions related to the requisition.

CREATE A PERSONNEL REQUISITION

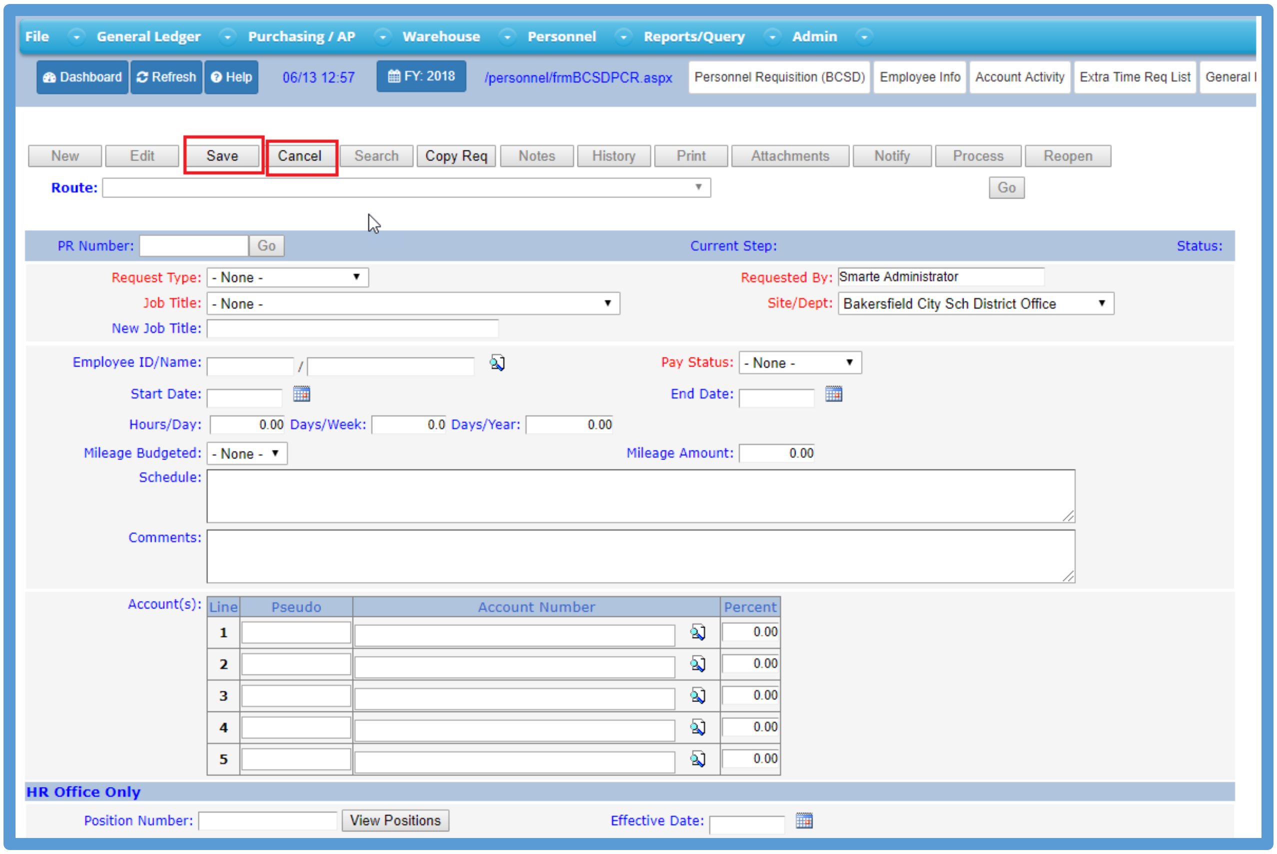
A new requisition can be started by clicking on the **'Create Requisition'** button located on the Personnel Requisition list page, or by clicking on the **'New'** button located on the personnel requisition page. Both will present a blank requisition page which first requires the user to select the type of requisition, then being able to click the **'New'** button on this page to begin data input.



Minimum data entry requirements for a requisition are dependent on the type of the requisition. The data inputs presented to the user will also vary depending on the type of requisition chosen. The required data entry fields for the selected requisition will be highlighted in red.



While in the process of creating or editing a requisition only the **'Save'** and **'Cancel'** buttons will be made available. Click on the **'Save'** button to save the information entered, or the **'Cancel'** button to cancel the input session, and restore the requisition page to its previous state.

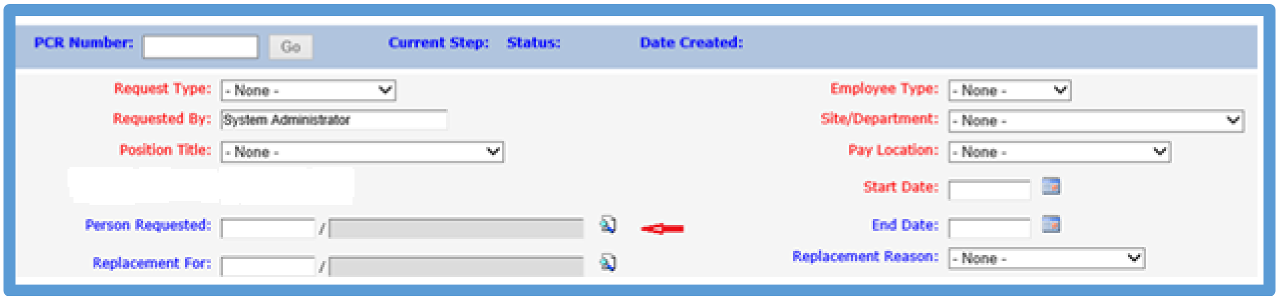


When you attempt to save a requisition the contents of the requisition will be validated. If a validation error occurs, a message will be displayed at the top of the page in red. All validation errors must be corrected below the requisition can be saved.

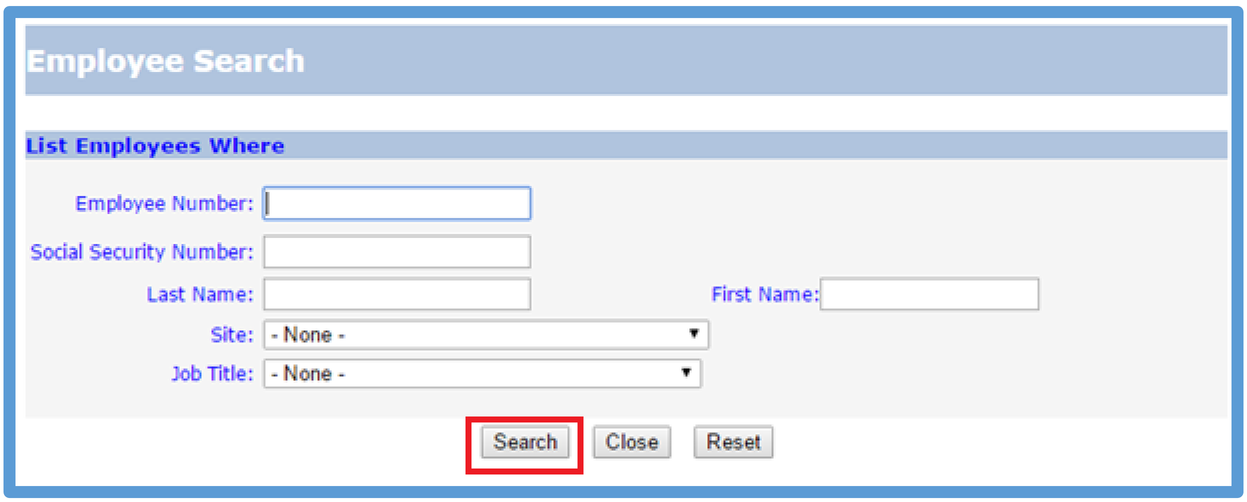
Once a new requisition is saved, it will be assigned a requisition number and displayed with all the information entered. All requisitions will start at the **'New Requisition'** step.

SEARCHING FOR AN EMPLOYEE

The employee information for an existing employee can be located two ways. One is by entering the employee's number into the 'Person Requested' field on the PCR form. The other option is click on the employee search' image icon and this will display the employee search page as shown below.



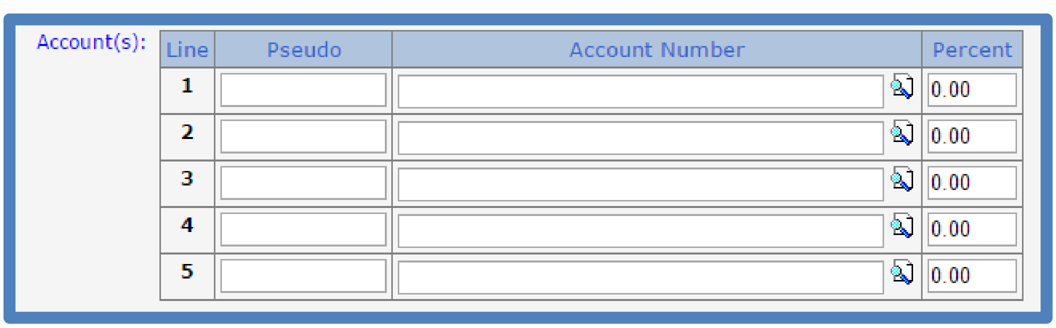
Enter the desired search criteria, i.e., employee number, name, Site, etc., and click the **Search** button to display the search results. An employee can also be removed from the PCR by erasing the employee number.



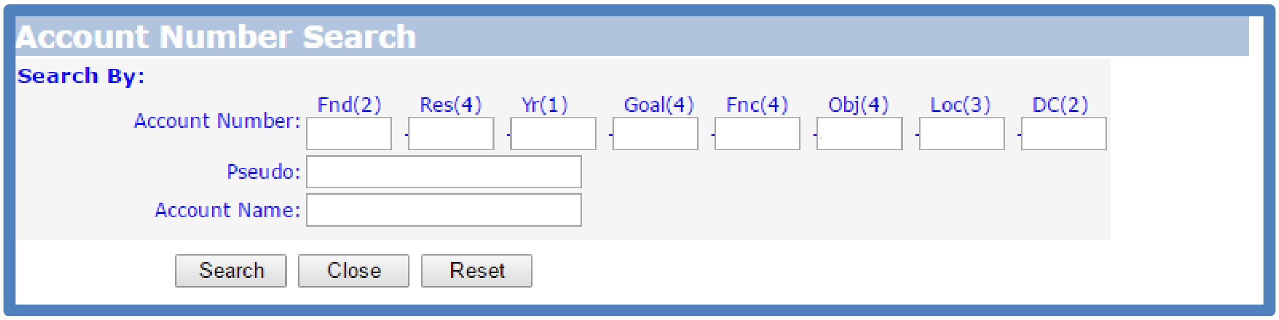
After locating the desired employee record, simply press the Select button to the left of the employee record to populate that information onto the employee fields.

ACCOUNT SEARCH

To add an account number to the requisition, click the image icon to display the account search page.

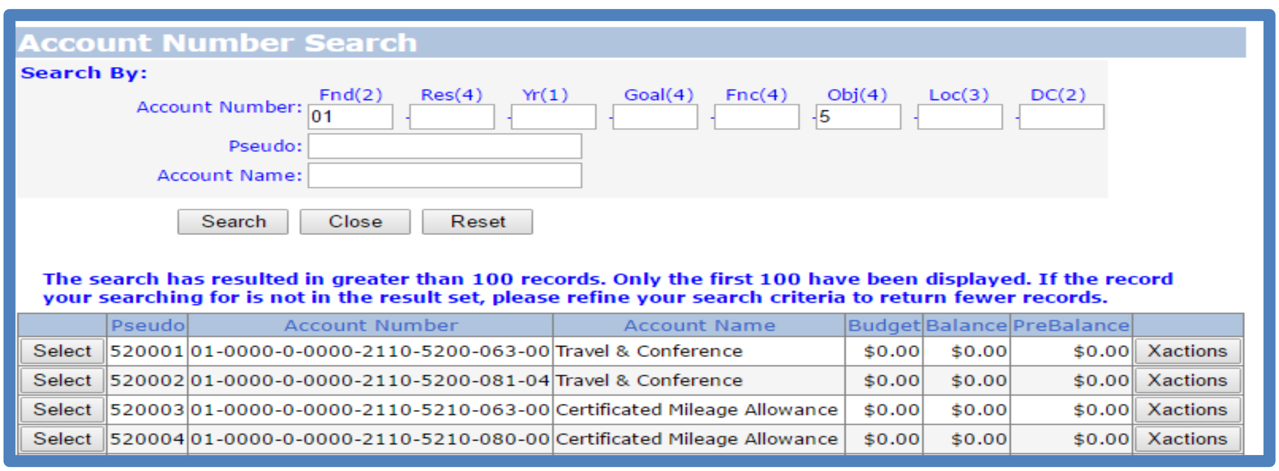


The Account Search page, shown below, allows you to search for and select an account number. Depending on your user profile, you may be limited to the account numbers you are allowed access to, which are normally the accounts for your school site or department.



Enter the account search criteria and click the ‘**Search’** button. If you do not know all the digits of an account number for a group of accounts, leave blank those digits, or use an underscore “_” as a place holder. The account search will treat spaces or underscores as wild card characters and return all accounts that match the digits entered.

A list of accounts to which you have access via your user profile will be displayed. Click on the **‘Select’** button next to the desired account and it will be copied to the requisition.


Account Number Search

Search By:

Fnd(2) Res(4) Yr(1) Goal(4) Fnc(4) Obj(4) Loc(3) DC(2)

Account Number: 01 - - - - - 5 - -

Pseudo:

Account Name:

Search Close Reset

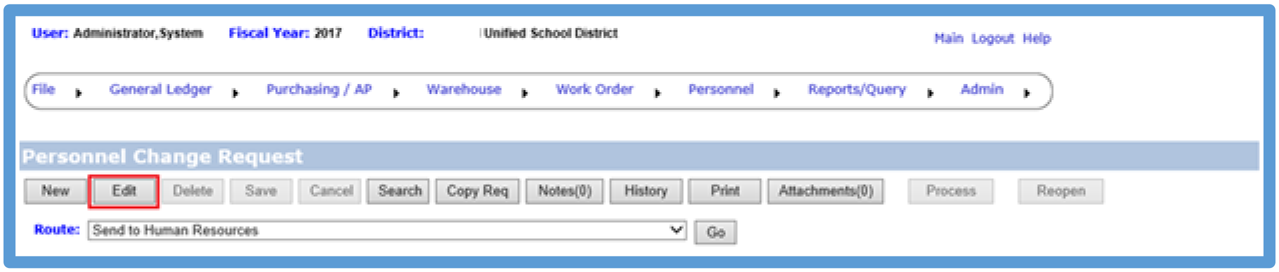
The search has resulted in greater than 100 records. Only the first 100 have been displayed. If the record your searching for is not in the result set, please refine your search criteria to return fewer records.

	Pseudo	Account Number	Account Name	Budget	Balance	PreBalance	
Select	520001	01-0000-0-0000-2110-5200-063-00	Travel & Conference	$0.00	$0.00	$0.00	Xactions
Select	520002	01-0000-0-0000-2110-5200-081-04	Travel & Conference	$0.00	$0.00	$0.00	Xactions
Select	520003	01-0000-0-0000-2110-5210-063-00	Certificated Mileage Allowance	$0.00	$0.00	$0.00	Xactions
Select	520004	01-0000-0-0000-2110-5210-080-00	Certificated Mileage Allowance	$0.00	$0.00	$0.00	Xactions

The Personnel requisition page will initially allow for four (4) accounts. To enter more than four (4) accounts to a requisition, save the requisition and then click the **‘Edit’** button. The requisition will show the four (4) original accounts entered, plus four (4) more blank account lines that may be used for additional account entries. Repeat to enter the number of accounts needed.

EDIT A REQUISITION

To edit a requisition, first locate the requisition you wish to modify. If you know the requisition number you can simply enter it into the PCR number field and click on the ‘**Go’** button, otherwise, you can or use the personnel requisition list page to locate your requisition.



A requisition can only be edited if it is at a location/step to which you have access. If you have access to edit the selected requisition, the **'Edit'** button at the top of the requisition will be enabled. (Note: if you are the originator of a requisition and it has been routed for approval, you will not be permitted to edit the requisition).

Click the **'Edit'** button to place the requisition into edit mode, this will allow you to make changes to the contents of the requisition. The edit page resembles and allows the same types of entries as the creation page; therefore, when editing a requisition, you should follow the same procedures as when you created the requisition. Once you have completed your changes, click the **'Save'** button. You can cancel your changes by clicking the **'Cancel'** button.

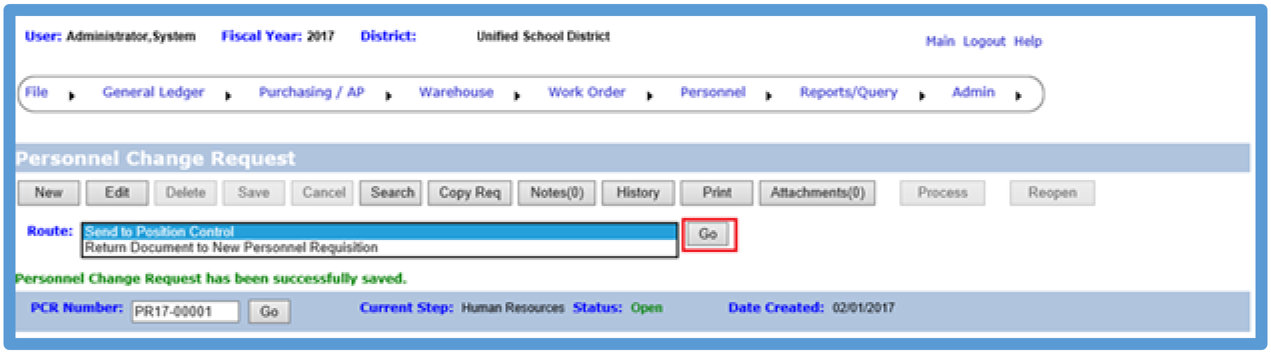
ROUTE A REQUISITION

Once a requisition has been saved, it can be routed to the appropriate departments for approval, eventually arriving at its final destination, usually the HR Department.

To route a requisition, click the dropdown arrow on the **'Route:'** field, as shown below, to list the possible locations/steps to which the requisition can be routed. Select one of the listed routes and click the **'Go'** button.

The routes that appear depends on the requisition's current location, account numbers, and/or any additional routing rules that have been defined as part of the approval workflow.

In addition, as the requisition moves through each approval path a **'Return Document to xxxxxx'** route is automatically added to the list, which can be used to return the requisition to any previous point in the approval path, including the originator.



VIEW ROUTING HISTORY

To view the routing history and approvals for a requisition, click the 'History' button. This will display a page that shows the complete routing history of the requisition.


Routing History

Document Number: PR-17-00003

Close

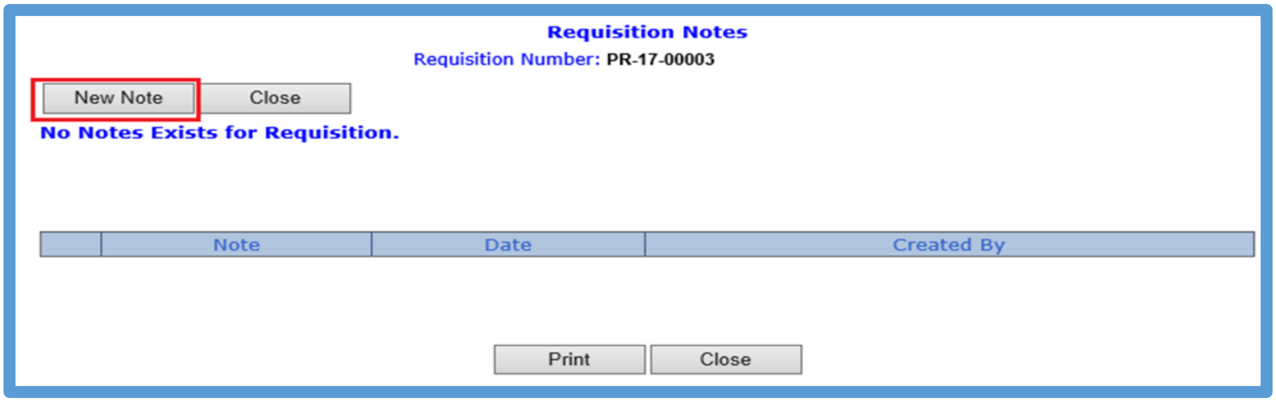
Route Name	From/Step Location	To/Step Location	Pre-Encu	User	Date/Time Sent
		New Personnel Requisition	No	Administrator,System	Monday, January 30, 2017 08:34 AM
Send to Human Resources	New Personnel Requisition	Human Resources	Yes	Administrator,System	Monday, January 30, 2017 08:34 AM

Close

The previous location/step, route taken, new location/step, pre-encumbrance flag, user's name and date/time of the routing are shown. The last entry in the routing history is the current location of the requisition. Click on the '**Close'** button to return to the personnel requisition page.

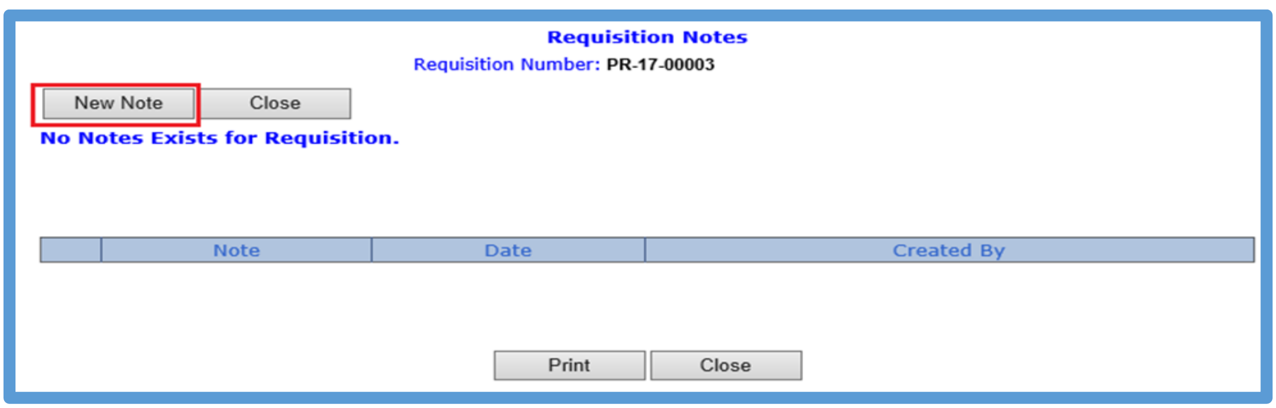
CREATE AND VIEW NOTES

It is possible to create and view notes for a purchase requisition by clicking the **'Notes'** button located on the Menu bar. You can also see the number of notes created pertaining to this requisition within the **'Notes'** button (in parentheses). Click on this button to display the requisition notes page. Click the **'New Note'** button to display the note entry area.
Enter your note and click the **'Save'** Button. The saved notes will always be displayed when the notes page is accessed from the requisition. Click on the **'Close'** button to return to the personnel requisition page.



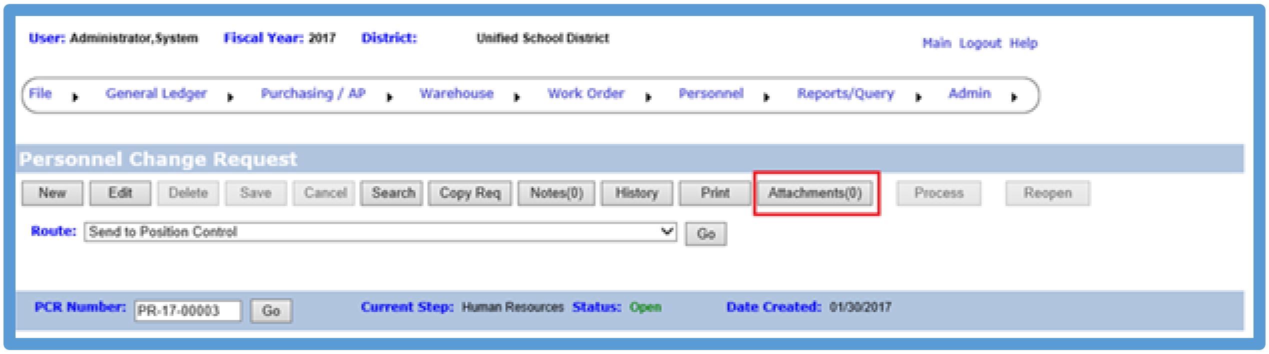
PRINT A PERSONNEL REQUISITION

It is possible to create and view notes for a purchase requisition by clicking the **'Notes'** button located on the Menu bar. You can also see the number of notes created pertaining to this requisition within the **'Notes'** button (in parentheses). Click on this button to display the requisition notes page. Click the **'New Note'** button to display the note entry area.
Enter your note and click the **'Save'** Button. The saved notes will always be displayed when the notes page is accessed from the requisition. Click on the **'Close'** button to return to the personnel requisition page.



ATTACHMENTS

You can attach any number of files/documents to a requisition. To attach a file, perform the following steps:



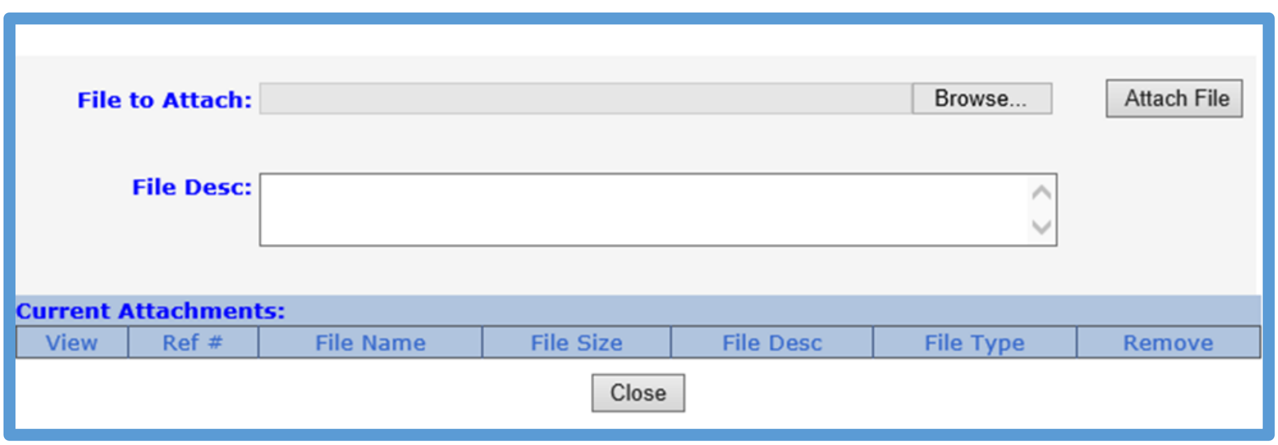
1. Click the **'Attachments'** button on the menu bar which will open the Attachments screen as shown below.
2. Click on '**Browse...**' button which will display the 'Chose File to Upload' screen. Using this screen search your computer for PDF files, pictures, or office documents that you wish to attach.

3. Once you have located the desired file, select it, this will display the file's directory path and name in the **'File Name'** field.

4. If you wish to provide additional information about the contents of the attached file you can enter this into the '**File Desc:'** input area.

5. Click on the **'Attach File'** button to attach the selected file.

6. Upon successful uploading of the file, a **'File Successfully Attached'** message is displayed and the file is listed under the **'Current Attachments:'** section, as shown below.

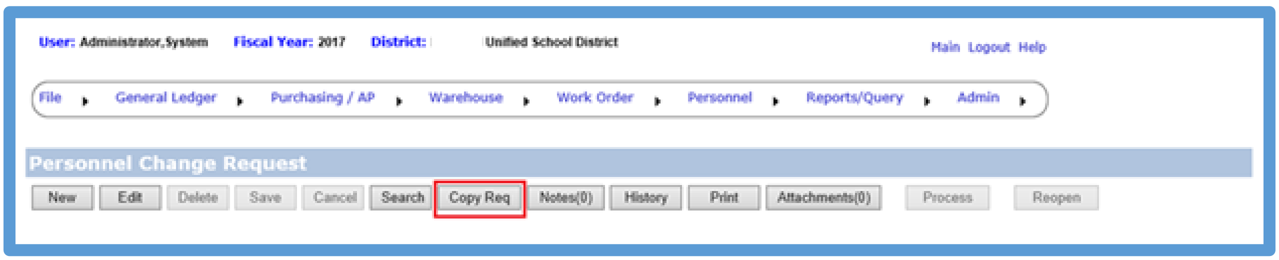


The **'Current Attachments:'** section lists all files that have been attached to the requisition, which includes the Ref #, File Name, File Size, File Desc and File Type.

To remove an attachment, click on the **'Remove'** icon next on the file you wish to remove. Click on the **'Close'** button to return to the personnel requisition.

COPY A REQUISITION

A new requisition can be created from an existing requisition by using the copy option. To copy a requisition, first select the requisition that is to be copied, then click on the **'Copy Req'** button. This will start a **new** requisition using all the information from the selected requisition. Click on the **'Save'** button to save the copied requisition.



PROCESS/REOPEN A REQUISITION

The **'Process'** button is used to change the status of the requisition from open-to-close. This button is generally only available to specific users and is used when the requisition has been completed. Processing the requisition changes the status to **'Closed'** and sends an automated email to the originator informing them that the requisition has been completed. Once the requisition is closed it can no longer be modified. If a requisition needs to be modified after it has been closed, the **'Reopen'** option must be used to re-open the requisition.