HR Front End Transaction – Administrative Transaction

Transaction Type – Administrative

Routing required – Department initiates and routes, College reviews and routes if employee class is A*, B*, C*, D*, E*, P*, or R*, HR reviews and applies

The administrative transaction should be used when documents need to be attached and routed to a central HR office, but no other transactional changes are needed.

HR Front End procedure:

1. Find employee, go to ERV
2. Select "Administrative" from the transactions menu
3. On the Attachments tab –
    a. Click <u>Add Attachment</u>
    b. Click <u>Browse</u>, select document to attach (either on your hard drive or network drive)
    c. Click <u>Open</u>
    d. Click <u>Add</u>, select document type
    e. Repeat as necessary for additional documents
    f. Once all are listed, click <u>Upload</u>. Check the message at the top of the screen to ensure that no error occurred.
    g. Click <u>Done</u>
    h. You may change the doc type from ERV by clicking the drop down box, select appropriate document type and click <u>Save</u>.
4. Click Memo Tab, enter memo describing the purpose/reason for the transaction and include your contact e-mail address and phone number
5. <u>Route</u> until no longer able to take ownership and route. Apply if offered (Academic Hourly and Grad). For other employee groups, should get message Success routing to COLLEGE or CAMPUS. If you are not the home org, it will first route to the home org. That unit must take ownership and route to COLLEGE or CAMPUS.
6. Central HR retrieves from Group Inbox, <u>Take Ownership</u>, review and <u>Apply</u>

Tips on attaching documents:

Each document should be a separate file unless otherwise noted. If the document is multi-page, it should be scanned as a multi-page document, not each page as a different file. For assistance with scanning activities please contact your technical support or your college.

When scanning a document here are some suggestions:

1. Use a file name of no more than 40 characters, LAST NAME_Init_UIN_*doctype*.pdf

    Example: SMITH_Z_3334445555_i9.pdf

or Example: SMITH_Z_i9.pdf

2. How to scan – each document as its own file – see list of document descriptions/types
3. What to attach – see transaction spreadsheet/transaction tips
4. Format of the file – pdf is best, can do Word or Excel, but never an executable file
5. Location of the file – it should be a secure drive – your hard drive or a secured shared location