Employment Action

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Overview

This document reviews the steps on how to submit and approve an Employment Action through the OPEN tab on the SAP Portal. The objective is for the user to access the Employee Request tile, navigate the Dashboard, initiate or approve an Employment Action and view Reports.

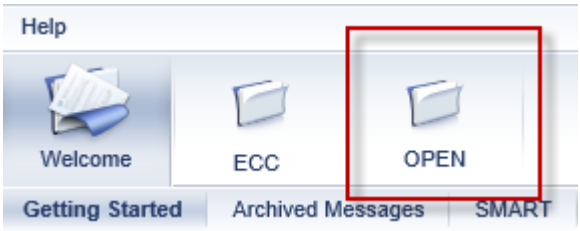
The Employment Action is an electronic action designed to be submitted by a manager or designee. Based on structural authorization the approver(s) reject or approve the action. After the approval process is completed the action is entered into SAP. The Employment Action follows an automated workflow to transport the action to the departmental or enterprise approvers

Questions about Employment Actions can be answered on the HR Shared Services website https://ssc.jhmi.edu or by calling HRSS directly at 443-997-5828.

Employment Action

Accessing the Employment Action

1. In Google Chrome or Microsoft Edge Browser, log into SAP and click on the “Open” icon



2. Under the HR/Payroll Tab, click on the Employment Actions title to launch the dashboard

Navigating the Dashboard

Icon Descriptions

Icon Text	Icon	Description
Home		Takes user to Dashboard
Reports		Accesses the Reports page
Help		Provides support links
Account Details		Displays the user's information including email preferences
Log Out		Logs the user out of the application
My Employees (located on the right-hand side of the screen)		Displays organizational units and employees. Orgs display based on user authorization. *Only users who have access to Employee Changes have My Employees*

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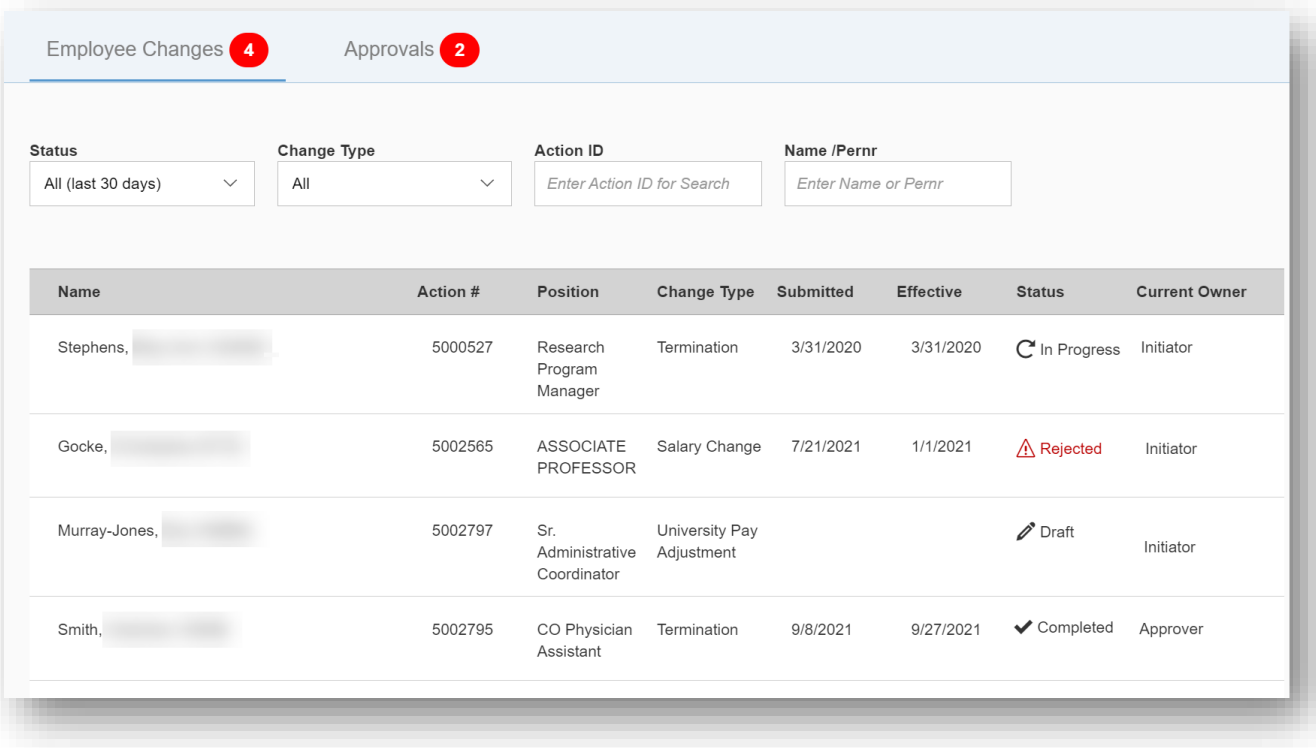
Action tabs

1. **Employee Changes**: Submit, view status or take steps on actions
2. **Approvals:** Approve, reject or review status on actions.
3. **Attention red circle:** The red circle to the right of the tab shows the number of actions that need attention. A response must be taken (such as approving) on the action



Status Field

1. Defaults to show all the actions submitted in the last 30 days. Select a status from the dropdown to sort the results by type of status
2. Status types:
   For Employee Changes
   a. **Rejected:** Rejected by an approver or HRSS back to the initiator or approver to resubmit or delete
   b. **Assigned to you:** Action is assigned to you to submit or approve
   c. **Draft:** A action has been created but *has not been submitted*
   d. **Assigned:** Assigned to a specific user to submit or approve
   e. **In Progress:** Action is waiting or being reviewed by approvers or HRSS
   f. **Completed:** Action has been successfully entered in SAP
   g. **Deleted:** Action has been deleted by the initiator, approver(s) or HRSS.

   For Approvals

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h. **Reserved By:** Action is currently being reviewed by another user. *The action can be viewed but cannot be edited or submitted by anyone but the current user*
i. **Locked By:** Locked by another user. This is used when another approver is researching to determine if an action can be approved. It also will prevent others from accessing the action.
j. **Ready:** The action is ready to be reviewed for approval.

3. **Action ID and Name/Pernr** allows users to search in the Dashboard by typing criteria in the fields. The search functions only show for Actions in the dashboard for the last 30 days. Anything that was approved, rejected or completed after 30 days will need to be researched in the reports function.

Change Type

1. Change type refers to the type of Employment Action that is being submitted. The default is set to "all" which displays all action types in the last 30 days. An example of an action type is termination

Overview of Actions

1. Employment Actions are displayed in a table for easy access. The columns can be sorted using ascending/descending by clicking on the column header
    a. Column Headers
        i. Name: Displays employees last name, first name and pernr
        ii. Request #: The Employment Action number
        iii. Position: Employee's position title
        iv. Change Type: Type of action being submitted
        v. Submitted: The date an action was submitted or was rejected back to the initiator/approvers (Drafts do not have submitted dates)
        vi. Effective: Effective date of the action
        vii. Status: Displays the current status of the action
        viii. Current Owner: User the form is currently sitting with
        ix. To open an action, click anywhere on the row with the employee's name.

My Employees (Only available to users who have Employee Change tab)

1. To open the My Employees bar, click on the blue arrow located in the middle of the right end of the screen
2. Use the dropdown under "Department" to select a specific department (organizational unit) or leave it to the default setting of 'all'.
    a. 'All' will alphabetically list every employee the user has access to (this includes withdrawn employees)
    b. Utilize the "Search" field to locate an employee by typing in their pernr, first name or last name. If a specific department is selected in the dropdown only individuals in that department will appear

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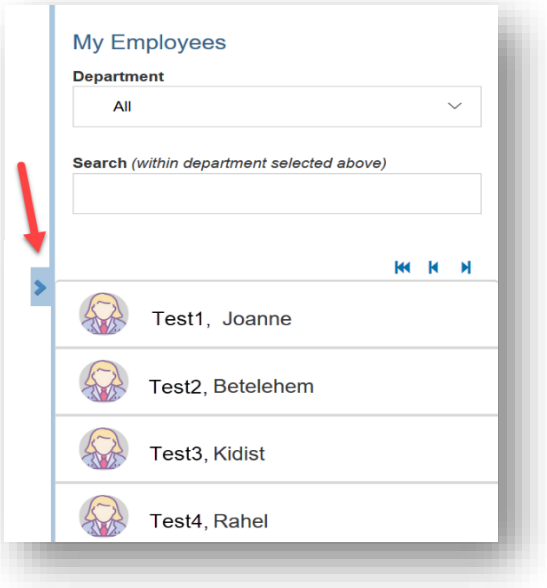
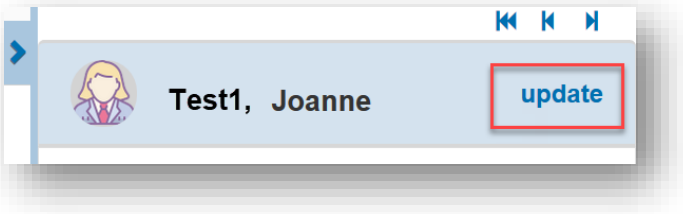
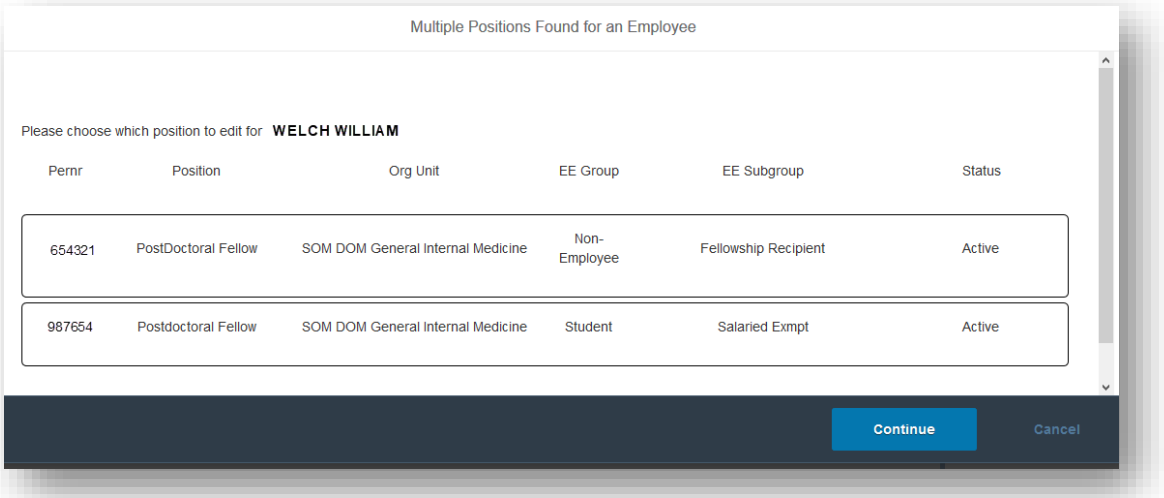


c. An action can be created by clicking on “update” next to the employee's name
   i. Hover over the employee for the “update to appear”



d. If an employee has more than one Pernr, clicking update will produce a “Multiple Positions Found for an Employee” pop up box.



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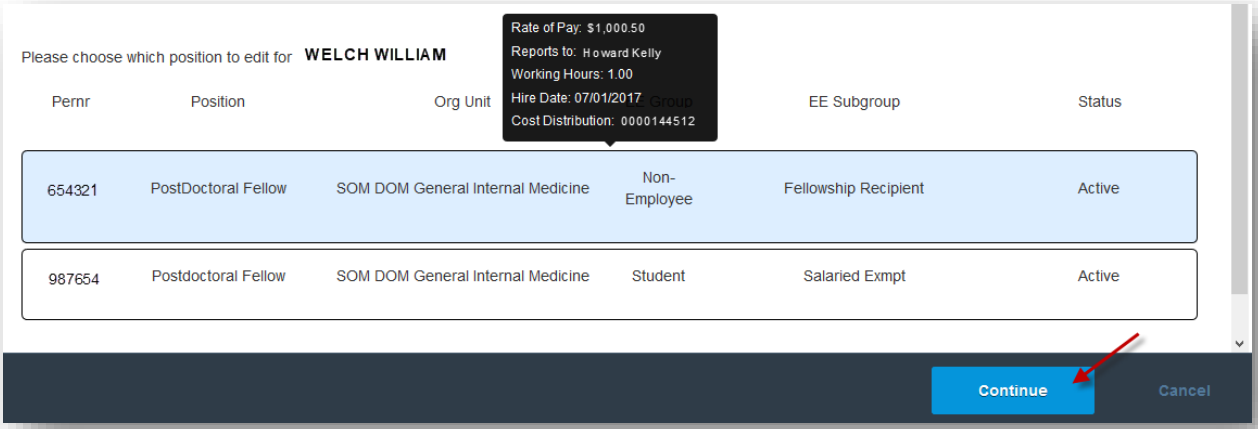
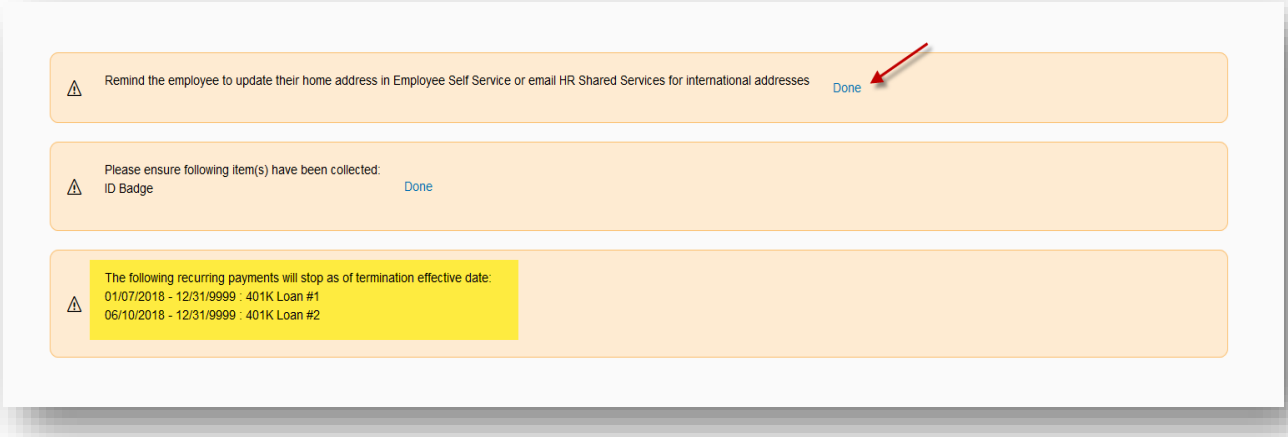
e. Hovering over the assignment displays a current snapshot of the employee's rate of pay, reports to, working hours, hire date and cost distribution. Click on the assignment (it will turn blue) and hit the "Continue" button to create an Employment Action that assignment



Additional Functions

Warnings (Initiator and Approvers)

1. Clicking on the blue "Done" icon indicates that item has been completed and the warning will not move with the request through approval. Items without a "Done" icon need to stay with the action through approval to ensure proper communication and processing is completed.
    a. Editing the "Action", "Effective Date" and "Why" will reinstate the warning. The warnings are also reinstated when an action is rejected. Examples of recurring payments are parking, voluntary benefits and loan repayments



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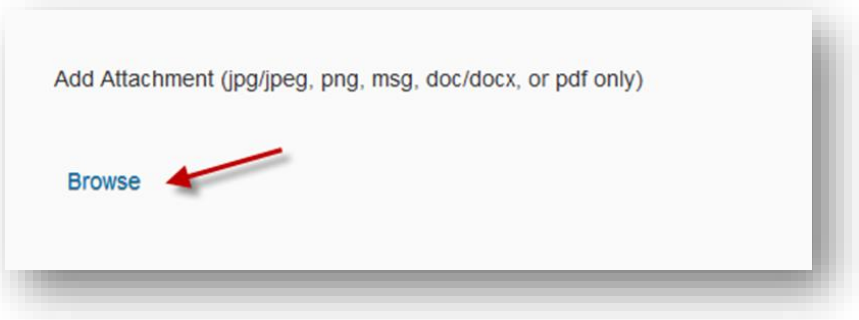
Save as Draft and Exit

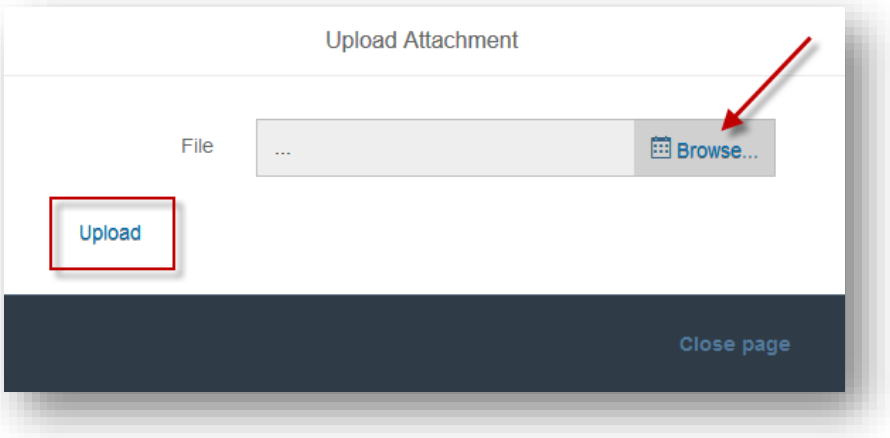
a. If the action is not ready to be submitted, click on “Save as Draft and Exit”.
b. The action will be available for 30 days on the dashboard to review and submit
    1. An action not submitted in 30 days will automatically delete. A new action will have to be submitted
c. The “Delete” button can be used at any time. Once the “Delete” is used, the action has ended.

Attaching a Document (Initiators Only)

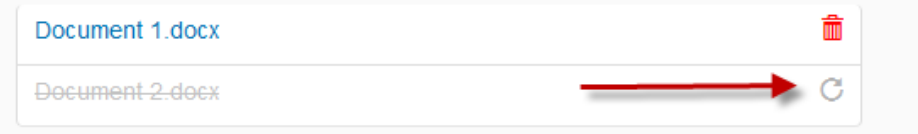
1. To attach document(s) click on the “Browse” icon



2. An Upload Attachment pop up box appears
3. Click on the “Browse…” button. Select the File that needs to be uploaded and click on Open, then click “Upload” to attach the document and repeat this step to upload another document



4. To remove a document, click on the red trash can and to restore a document that has been removed, click on the grey “refresh” symbol



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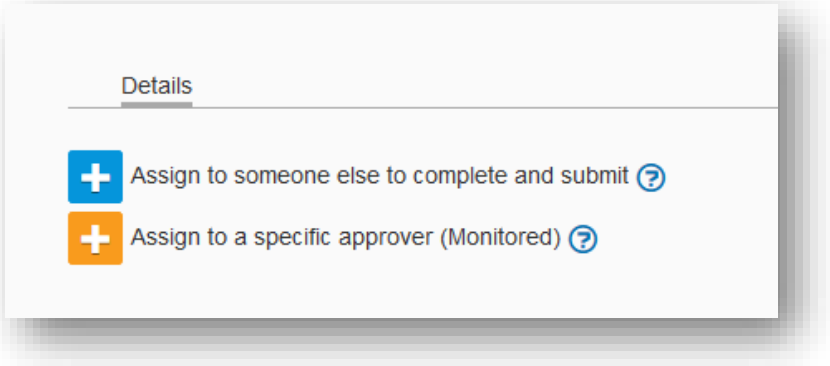
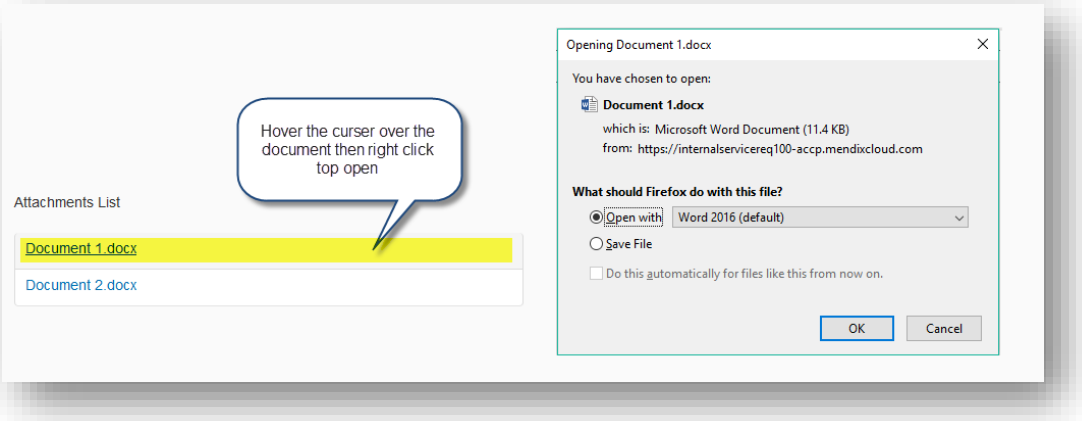
Assign to Someone Else or Assign to a Specific Approver Monitored (Initiators)

1. Assign to someone else to complete and submit. This allows for another designee to finish the action and submit. Only users who have the *same access or higher* can be assigned
    a. Click the blue "Plus Sign" to search and add an initiator
    b. Click on the blue trash can to remove individual or to back out
2. Assign to a specific approver (monitored). Overrides the default approval process by selecting a chosen approver within the predetermined approver group. *Specific chosen approvers are monitored to prevent misuse and/or abuse of this functionality*
    a. Click the yellow "Plus Sign" to search and add an approver
    b. Click on the blue trash can to remove individual or to back out



View Attachments (Approver Only)

1. View attachments from the initiator by hovering over the document. A pop up will appear with instructions on how to open the file. Hover over the document and right click. A pop up appears with instructions on how to open the file



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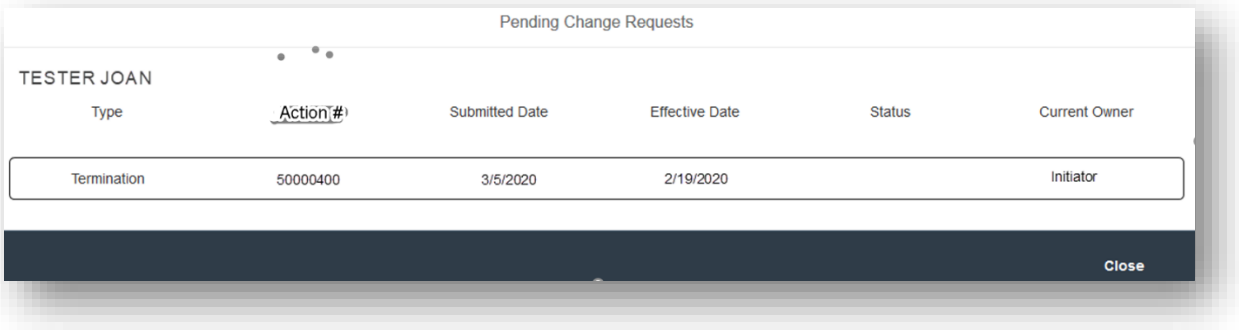
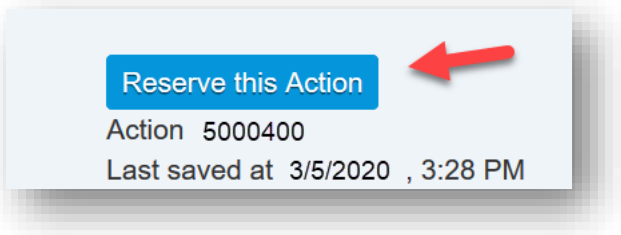
Current Requests

Only shows Employment Actions. *It does not show if an ISR has been created or if the ISR has been completed in SAP.* To view current requests double click on the blue "eye" icon

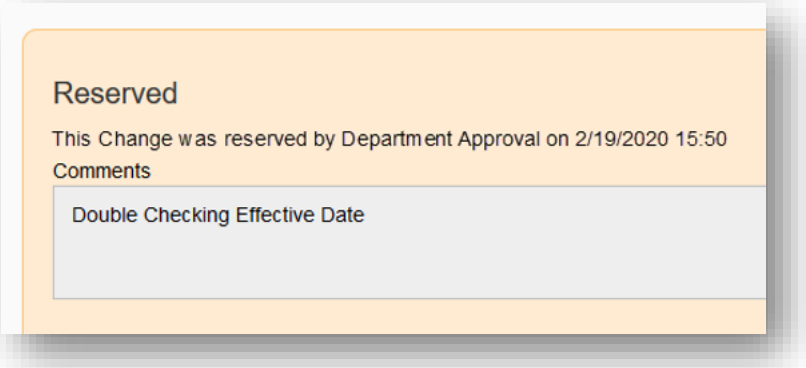


Reserve this Request icon

Located on the top right-hand side of the screen when approving, allows users to prevent others from making edits until it's released. This function is only to be used on items that require additional research by the approver.



1. Click on the "Reserve this request" Icon, the "Reserve Request" pop up box appears with a comments field. Only the user entering the comments will see its contents. Once the form is approved, rejected or released the comments will permanently disappear. Once comments are added click on the blue "Reserve" button. A yellowish orange box titled "Reserved" will appear at the top the comments and time stamp



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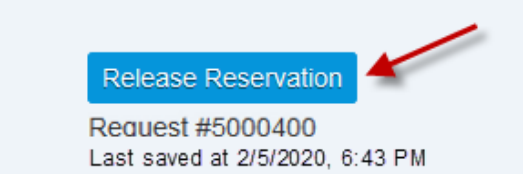
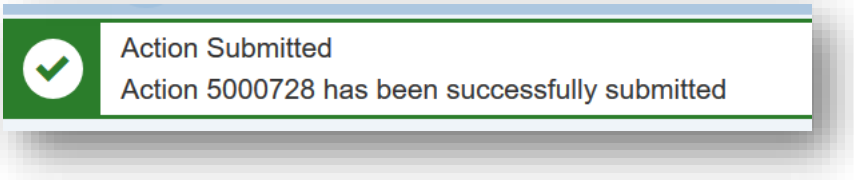
2. To release the reservation, click on the blue “Release Reservation” button (located at the top right corner of the screen). This will release the lock on the action



Warning Messages after Submitting

1. Once the action has been submitted a pop up will appear at the top of the screen.
    a. Green Message “Action 12345678” has been successfully submitted”, means the action is moving to the next stage in the process for approvals
    b. Green Message “Action 12345678” has been successfully posted to SAP”, the action was successfully submitted by the last approver and has been entered into SAP
    c. Orange Warning “Action 123345678” will automatically be completed after payroll has been finalized”, the action has been successfully submitted by the last approver and will be entered into SAP once payroll has finalized