OneForm Feature Update (April 14, 2014)

USER FEATURES

#002 – Sharing/editing information beyond primary/current contact (New Feature!)
Hiring units will now be able to see all records within their respective work groups. Viewing and editing these records will no longer be limited to the primary contact and the current contact, so if an individual is away, someone else may continue to process the appointment. For confidential hires, users MUST check off the “Secure Hire” check box. This will limit the record’s visibility to the current contact and the primary contact only.

The individuals who will be able to see the records in your workgroup are the individuals in the primary contact drop down menu.

Please note: it is strongly recommended when processing a secure/confidential hire to first choose the form style, check “Secure Hire,” save the record, then proceed with populating the fields. If this process is not followed, other users within your department may be able to see the record in their grid temporarily.

Individuals hiring in Education (370170, 370148, 370200, 360500, 370101, 370109) and the Dean’s Office (370100) should always check off the “Secure Hire” check box and follow the above procedure when commencing with a new hire. Due to the way OneForm approvals are configured, your hires are visible to individuals who are appointed in your DeptID but are not part of your immediate work group.

Help Screens and SOPs have been updated to document this feature.

#011 – Copying records (New Feature!)
This feature eliminates the need for manually entering data for similar appointments. Under the ADD button, a new option has been added to copy the record the user has selected in the grid.

1. To copy the record, select the record you wish you copy in the main Grid.
2. Click the ADD button at the top left of the grid and select, “Add (COPY) New from Existing.” This will create a new record based on the data in the record you have selected.
3. You will be asked to verify that you are copying the correct record with a pop up dialogue box that asks, “Are you sure you want to ADD a NEW RECORD based on the data in the Current Record (Tracking No. XXXX)?” Click yes or no accordingly. The new record will open, and you will be able to populate the remaining fields in the newly copied record.

The fields in red (below) have been set to copy when you select ADD → Add (COPY) New from Existing.”

Please note: if you don’t want one of these fields to be copied, please leave it blank. This feature is currently available only to Summer Student job codes (V9506, V9507, V9508). Usage will be expanded to other groups in a future release of OneForm.

Help Screens and SOPs have been updated to document this feature.

#045 – Separate JD status tracking drop down (New Feature!)

The creation and evaluation of job descriptions follows a separate process which occurs within the overall staff hiring process and requires its own tracking and reporting mechanism to ensure overall efficiency.

A new drop down menu and status log have been created.

Please note: knowledge of the employee group (PMA or UWOSA) is required to utilize this feature as the process differs between UWOSA, PMA (new) and PMA (existing) job description evaluation steps. If you are
unsure whether you should be using a PMA job description or a UWOSA PDQ, please contact Schulich HR for assistance.

Help Screens and SOPs have been updated to document this feature.

#010 – Grant waivers not required for Summer Students (Improvement)

Normally, if a research account is selected, a grant waiver must be attached and submitted. This process does not apply to summer students. With this improvement, when a hiring manager selects the summer student job codes (V9506, V9507, V9508), a waiver will no longer be required.

Help Screens and SOPs have been updated to document this feature.

#001 – SAN Comments Tab (Improvement)

The SAN Comments field under position details has been moved to its own separate tab. This tab should be used for brief comments that need to be on the SAN output which is sent to Corporate HR. It only appears when using any of the SAN form styles, and will not appear on the RFH form styles.

Help Screens have been updated to document this feature.

SAN OUTPUT EMAILS

When sending a SAN to corporate the subject of the email will be EmployeeSurname, EmployeeFirstName EmployeeWesternID (OneFormTrackingNo)

When sending a SAN to corporate the body of the email message will be "Please see attached SAN and Offer Letter for EmployeeFirstName EmployeeSurname". If a work permit is attached then the message will be "Please see attached SAN, Offer Letter and Work Permit for EmployeeFirstName EmployeeSurname". If there is a posting number then the message will be appended with “The Posting Number, if applicable is (postingno)."
BEHIND THE SCENES

#003 – Delegating Signing Authority *(New Feature!)*

When a Schulich Final Approver is going to be out of the office and unable to approve RFHs or SANs, they may now select a new Final Approver from a drop down menu in OneForm.

1. To change the Final Approver, log into SAS and then go into the OneForm main grid.
2. From the toolbar, select the “Final Approvers” drop down menu.
3. Select RFH Final Approvers or SAN Final Approvers to view a list of individuals who are authorized as final approvers.
4. Select the new Final Approver from the list provided.
5. A pop-up dialogue box will ask, “You are about to change the RFH Final Approver. WARNING: The current Final Approver must have completed their approvals. Continue? YES/NO.”
   a. Select YES if you have cleared all items in your main grid which have been submitted to you as a Final Approver and are sitting with you as a current contact.
   b. If you have not cleared your pending approvals, please click NO to return to the main grid.

This reminder is in place to ensure that anything that has already been submitted to the Schulich Final Approver and is sitting with them as a current contact *must be cleared before* switching to a new approver.

#056 – Prompt for rationale when refusing an RFH or SAN *(Improvement)*

A prompt has been added for Approvers to add a rationale when refusing an RFH or SAN to ensure clear communication, as well as providing data for future training. This change will not impact business processes.