myEverest
electronic Personnel Action (ePA) Form Guide

The University of Alabama
Payroll Services

Everest, Powered by K2® is being utilized for several different UA processes, but this guide is specifically for the Payroll electronic Personnel Action (ePA) form process.

ePA Originators and Approvers have access to myEverest—a combined Worklist and Tracking Tool. MyEverest allows users to not only action their outstanding ePA's, but also to *track their progression throughout the remainder of the approval process.
**Approver access to tracking tool is by request only.*

ACCESSING myEVEREST

1. Log in to www.mybama.ua.edu
2. Click the Employee tab
3. Navigate to the Payroll Services section on the left side of the page
4. Click the myEverest link beneath the Everest electronic Personnel Action Forms heading
5. When prompted to log in to Everest, use *my*Bama credentials

myEVEREST WORKLIST

If there are more than 20 items on the Worklist, a "Load More" (e.g. Load 20 More) link will appear at the bottom of the list. Click the link until all transactions are displayed.

Worklist Elements

The worklist is divided into 4 columns.

1. Activity Name: Identifies the current approval step in the workflow
2. Folio: Name assigned to the transaction consisting of identifying elements which are derived from the ePA form
   Last Name-CWID-Employee Class-Payroll ID-Fund-Organization-Account-Position Number-Begin Date-Transaction Number
   Note: Termination type ePA's may be missing certain Folio elements.
3. Task Start Date: The day or time a task was assigned to the approver
4. Workflow Name: Identifies the K2 process
   - If someone is involved in multiple K2 processes this will be helpful in identifying the form type. For example, the Workflow Name for this process is EPA.Main.

Sorting Worklist Items

The Activity Name, Folio, Task Start Date and Workflow Name columns may be sorted alphabetically by clicking the column heading.

Searching Worklist Items

To search for a specific worklist item(s), enter the search criteria (i.e. last name, CWID, employee class) in the text box to the right of Search (upper right corner of worklist). Items matching the search criteria will be highlighted in yellow. Clear the search criteria and press Enter to return to the full worklist.

Viewing Worklist Items

To open a form, double-click on the row or click the arrow on the right side and then click Open Form. When prompted to log in to Everest, use *my*Bama credentials.

Refresh

Click the Refresh button (upper right corner) often to clear items that have been actioned and to receive new items.
Note: Worklists automatically update every five minutes.

SEARCH, START AND SAVED BUTTONS

If these buttons do not appear once logged in, click the EPA.Main bar.

Search Electronic Personnel Action Form

The Search Electronic Personnel Action Form button is for University Route Approvers only, e.g. Human Resources.

Start Electronic Personnel Action Form

The Start Electronic Personnel Action Form button allows Originators to begin new forms without toggling between *my*Bama and myEverest.

Saved Electronic Personnel Action Forms

The Saved Electronic Personnel Action Forms button provides a list of an Originator's saved forms, which have not yet been submitted. When clicked, the ePA Saved Requests list will open in a separate tab. Click the ePA Form Link to open a form and complete the saved draft. Originators may open and save forms multiple times before submitting. To delete a saved transaction which is no longer necessary, open the form, click the Clear button in the bottom left-hand corner, and then click OK. To immediately remove the form from the Saved list, click the green refresh button. The list is automatically updated every 5 minutes.

myEVEREST TRACKING TOOL (Approver access is by request only)

Workflow Instances

To track a form, click the EPA.Main bar and all <u>active</u> ePA's an originator has started or an approver has actioned within the last 90 days will appear in the Active Workflow Instances table. Forms outstanding for longer than 90 days cannot be tracked. See Active Workflow Instances section below.

Active Workflow Instances

Ten ePA's per page will be displayed. If more than ten ePA's are active, use the page arrows at the bottom of the table to display more forms. Each page may be sorted alphabetically by clicking the FOLIO column heading.

1. Click on the row of a form to track its progress
    a. The Current Activity box below the table will display the approval step, e.g. Department Route, Principal Investigator, etc.
    b. The Assigned To box will display the myBama username of the current approver. If the form is in a University Route, it will display the name of the office, e.g. Academic Affairs, Budget Office, Human Resources, etc.
        i. Exception, Payroll Input will always display K2LDAP:CBLAKNEY, but tasks are shared among all Payroll Input staff
        ii. When the Assigned To box displays Complete, the form has been loaded into Banner. It will move to the Completed Workflow Instances side after the Benefits Office and Payroll Processors have an opportunity to review.

Completed Workflow Instances

Ten ePA's per page will be displayed. If more than ten ePA's have been completed within the last 90 days, use the page arrows at the bottom of the table to display more forms. Each page may be sorted alphabetically by clicking the FOLIO column heading.

Activity Instances & User Performance Grid

Once an ePA has been selected from either the Active or Completed Workflow Instances table, a pie chart will appear with more details about the form. Click on a piece of the pie, and the details will appear in the User Performance Grid to the right of Activity Instances.

Example: Click the Department Route section of the pie chart to display the usernames of the departmental approvers who took action on the form.