

TeamWorks PEAR Officer Quarterly Status Report

Revised 8/3/2011

Background

TeamWorks is the tool that facilitates the transfer of Personnel Action Requests (PEAR) information from UMS to HERMIT, the University HR and Payroll database. TeamWorks is sufficiently mature enough, at this point, to be currently handling numerous PEAR requests per day. This presents the submitting PEAR Officers with a challenge of tracking these requests through to their ultimate completion or rejection.

Solution

To assist in tracking these requests, IS has developed an email to be sent to each PEAR Officer with an attachment that can be opened in Microsoft EXCEL. This attachment will list all Requests that had activity in the prior quarter that lists the email recipient as the Submitter. The information included will be the last status achieved during that quarter. In the cases where the request has multiple activities such as a Fund and Salary Changes, there may be multiple entries in the attachment for that request.

A requirement of the UMS PEAR request process is for the Submitter's Name, NetId and Telephone number to accompany the request. This email process is dependent upon UMS submitter NetId being the same as their Enterprise NetId which in turn must be the same as the entry in the HR-maintained Unit Reporting Data that cross references the submitter ids to Units. By design, if the submitted NetId and Home Unit listed in the request or obtained from HERMIT cannot be matched to the Unit Reporting Table, the request will be rejected. It should be

noted that those requests without a valid submitter NetId are not included in any attachments created by this process.

Procedures

On, or about, the first day of each quarter (January 1, April 1, July 1, and October 1) each submitter will receive an email with all TeamWorks request activity for that submitter for the preceding quarter. This email will have an attachment that has a ".csv" type. This file is a text file and can be read by any text reader like Notepad or Wordpad. However, the file read this way will not be easy to read. It is recommended that the email recipient save the attachment to a file in a folder to which the recipient has access. Please remember or write down the location for later retrieval. If the saved file becomes lost, the attachment can be saved again.

Once the attachment is saved, open Microsoft EXCEL and then open the file from the File Open menu function in EXCEL. You may have to alter the search criteria EXCEL uses to find files to include ".csv" files (usually found in the "Text Files" type). Once you locate the saved attachment, just double click upon the attachment's file name in the file list. This should display the contents of the file in EXCEL.

You will notice that there are several columns of information including Home Unit, Employee ID and Name, Effective Date, Request Type, Overall Status, Transaction Type and Status, and Reference Number and Seq. Number. Hopefully, this information should help you reconcile your PEAR Requests.

If there is a question about any entry in the attachment, please call Jim Schaffner, 452-4466. Be prepared to share the Employee ID, Effective Date and the Reference Number and Seq. Number of the request in question.