Understanding ECSD Workflow

Date: 08/12/2020

First Step

- If you are a Principal, Assistant Principal, Supervisor, or Director, you will be assigned to a work queue so that you can approve (or reject) the forms initiated by your cost center. Most of the work queues are named this way: **CostCenter#_Approvers** . So Hellen Caro would be 0021_Approvers, Pensacola High would be 0411_Approvers, Internal Auditing would be 4201_Approvers, etc.

- The **<u>MOST CRITICAL</u>** part of being an approver is that you can receive email notifications to alert you that your approval is needed. This part is dependent on you following the instructions on the next page. These are detailed instructions on how to enable email notifications. If you fail to do the steps on the next page, you will never know when a form needs your approval and the forms will accumulate in your work queue.

1. Go to the ECSD website and click on **STAFF**
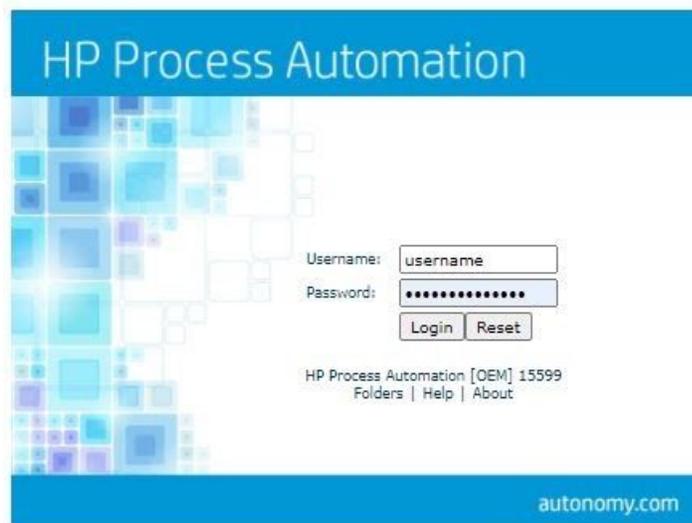2. Scroll down to the letter S and click on "**Saved Workflow Forms**".

   <u>S</u>

   <u>Safe Schools Training</u>

   <u>Safe Schools Training Instructions</u>

   <u>Saved WorkFlow Forms</u>

3. Log in with your username and password.

   HP Process Automation

   Username: username
   Password: ••••••••••••
   [Login] [Reset]

   HP Process Automation [OEM] 15599
   Folders | Help | About

   autonomy.com

4. Click on **Work Queues** … then click **Show My Queues**.

   hp Process Automation

   Folders   Inbox   Sent Items   Saved Items   **Work Queues**

   [Show My Queues]

5. You should now be able to see your work queue.

   ☐   9999_Approvers

6. Now click the little square box to the left of your work queue name. Then click the tab, "**Enable Notify**". This will place a tiny envelope in front of your work queue.   ☐   ✉ 9999_Approvers

Now you have enabled email notifications. Good job!

- Please be aware that most of the approvals require 2 steps:
  - After you have clicked on the "Signature" field which inserts your name, the date, and the time, click "**Go**" beside the word **Submit**.

Submit	⌄	Go

  - Then click **"Send"** on the next screen.

Notes:

Subject	WH Teacher Warehouse Requests
Notes	

Send	Back	Cancel

- **** If you do **NOT** wish to approve a form, click the dropdown (v) beside the word "Submit" and select "**Reject**".

Reject	⌄	Go

Click "**Go**". On the next screen, explain why the form is rejected in the "**Notes**" section and click "**Send**". This will return the form to the person who originated it.

Notes:

Subject	Disposal: 0101_03002 on 2020-06-17
Notes	I am rejecting this form because some of the items are missing. Please come and see me.

Send	Back	Cancel

Date: 08/12/2020

Listing of forms that might need your approval:
Field Trip

This form is to request bus transportation for a field trip on a specified date and time. There must be one form submitted for every bus that is needed. Once Principal Approval is given, the form will be routed for more approvals based on the account coding provided. Then the form goes to Transportation so that a driver can be scheduled.

Travel In-County (T1)

 This form provides a detailed listing of an employee's travel log within Escambia County. It is preferable to have the employee submit these monthly … instead of having multiple months on one form. When the appropriate Supervisor approval has been given, the form will go to the district Travel Office for approval and payment.

Equipment Disposal

This form is used to get rid of broken, non-functioning, or outdated equipment. It is important that the originator keeps a copy of this form so as to provide documentation when the yearly audit reveals that items are no longer at this site. After Supervisor approval is given, the form goes to the Budgeting Dept for review and then to Surplus Operations. The crew from Surplus Ops will come and pick up the items for disposal. The form then goes back to Budgeting so they can update the disposals in Skyward Fixed Assets. ** If the equipment designated for disposal was purchased with Title I money, the form will automatically route to the Title I department for their approval.
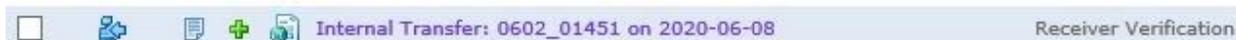
Equipment Transfer

This form is used to move equipment from one site to another. There are a few things to be aware of concerning this form:

- If the equipment to be transferred was purchased with Title I money, the form will route to the Title I office for their approval. Items purchased with Title I money can **ONLY** be transferred to other Title I schools.

- On this form is a radio button to select the "type" of transfer: a transfer that involves the Surplus Operations department or an "Internal transfer - Already Done" (which is usually done by IT Techs). The first method (Surplus Ops) will be documented by a work order #, the driver signature, and the Supervisor signature.

The second method (IT Techs) is harder to track down. The techs must be very specific with information: Which person at the receiving site received the equipment? In what location (at the receiving site) was the equipment placed? These answers will be helpful when your site is audited.

- The assets can **NOT** be updated in Skyward until the "receiving" school or department signs the form indicating that they indeed received the designated equipment. Be sure that the listed equipment is actually on your campus. Once it is updated in Skyward, you will be held responsible.

- Internal Transfer forms waiting for your approval (as the receiver of the equipment) will be in your work queue like this:

☐　🐣　📄　➕　📇　Internal Transfer: 0602_01451 on 2020-06-08　　　　　　Receiver Verification

- Click on the form to open it. After you have verified that the items are on-site, look at the red rectangle area at the bottom of the form.

Work Order #	This equipment was moved by internal transfer (not Surplus Ops). Someone at the receiving center must validate this transfer by typing your name in the "Received By" box and click the button to the right. Then click "Go" and "Send" on the next page.	Received By
Date Received in Maintenance		(First and Last Name)
Maintenance Supervisor		
Maintenance Supervisor		Click here to sign

Type your name in the "**Received By**" field then click the button "**Click here to sign**".

Work Order #	This equipment was moved by internal transfer (not Surplus Ops). Someone at the receiving center must validate this transfer by typing your name in the "Received By" box and click the button to the right. Then click "Go" and "Send" on the next page.	Received By
Date Received in Maintenance		Pam Wilson
Maintenance Supervisor		(First and Last Name)
Maintenance Supervisor		Pam Wilson
		2020-08-13 13:32:32
		Click here to sign

Now submit the form.

PARs (Personnel Activity Reports)

These forms are programmatically generated each month and sent to school district employees who are paid from split funds: General Fund and Federal Funds. Once the employee signs the form, it comes to a Principal or Supervisor for approval. The form indicates the breakdown (percentages and account coding) for that employee's pay and this should also reflect the employee's time spent at work. Once the Principal or Supervisor approves the form, it goes to a Project Manager for approval and then is archived for later reference.

Data Quality Checklist

These forms must be initiated monthly by the Data Specialists at each school based on the guidelines in the SIS Manual under the FTE/Survey Reporting section. According to the schedule, there are different tasks to be completed for each month. After the Principal Approval, the form is sent to MIS for review. These forms are used to assist schools in cleaning up student data for better state reporting.

Employee Accident Report

This form is submitted whenever an employee is involved in an accident at work. Once the Principal or Supervisor approves it, the form goes to Risk Management for their review and it is archived.

Student Accident Report

This form is submitted whenever a student is involved in an accident. Once the form is approved by the Principal, the form goes to Risk Management for their review. Also, upon the Principal's approval, a "Parent Copy" of the form is generated and saved in a designated work queue. The work queue is "**costcntr#_Reports**". So, for example, Jim Allen Elementary would be 0031_Reports. The principal, APs, and school secretary have access to this work queue in case the injured student's parents come to the school and want a copy of the report.

Athletic Injury Report

This form is submitted (only by Middle and High Schools) for any student injured in a sports related activity. Once the form is initiated by a Middle School, the form goes to the Principal for approval. Athletic Injury forms for a High School MUST be submitted by the Athletic Director. Thus, Principal Approval is not required. The form then goes to Risk Management for review and assessment.

Visitor Accident Report

This form is submitted whenever a visitor is involved in an accident occurring at a school district site. Once submitted, this form will require Principal or Supervisor approval before going on to Risk Management.

Property Incident Report

This form is submitted for any incident involving a loss or damages to School District property. Principal or Supervisor Approval is required before the form goes to Risk Management for processing.

Listing of forms that do <u>NOT</u> need your approval, but are available for your viewing:

CSO Daily Log

The Campus Security Officers and School Resource Officers complete a daily report of their activities on campus as well as any security areas of concern. Once the officer submits the form, it first goes to the Protection Services department to account for the officers time and work location. Then the form goes to your "report" work queue. No approval is needed, but the forms are there for your information. These are in the "**costcntr#_Reports**" work queue.

Frequently Asked Questions:

1. **After I submit a form, how do I know where it goes?**
   There is a folder called "**Sent Items**" in the top left side of the screen.

Click on the Sent Items tab and you will see a listing of forms that you have recently submitted. There is an odd-shaped blue symbol to the left of the form name.

Click on the blue symbol. This will show you a detailed listing of where the form has been, where it is currently located, and possible locations it will go to next.

The **green** circle above indicates where the form is currently located. Black circles indicate that the form has already been there. Blue circles represent where the form may go next.

2. **My form was rejected. How can I find out why it was rejected?**
When a form is rejected, the originator will receive an email

☐ ☆ formflow	Disposal: 4208_03232 on 2020-08-16 - Notification Process Notification -

The notes as to <u>why the form was rejected</u> will be in the email.

ALSO, rejected forms will be located in your "**Inbox**" tab.

There will be a yellow "notes" icon on the line with your form. Click on it.