

## PAC Workflow, Roles, and Security Module Transcript

Visit the [PAC Training](#) webpage on the [HR Manager Toolkit](#) for more information and training materials.

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### PAC Workflow, Roles, and Security

#### Module Transcript

Following is the transcript of the PAC Workflow, Roles, and Security training module accessed via the [Enterprise Learning Management system](#).

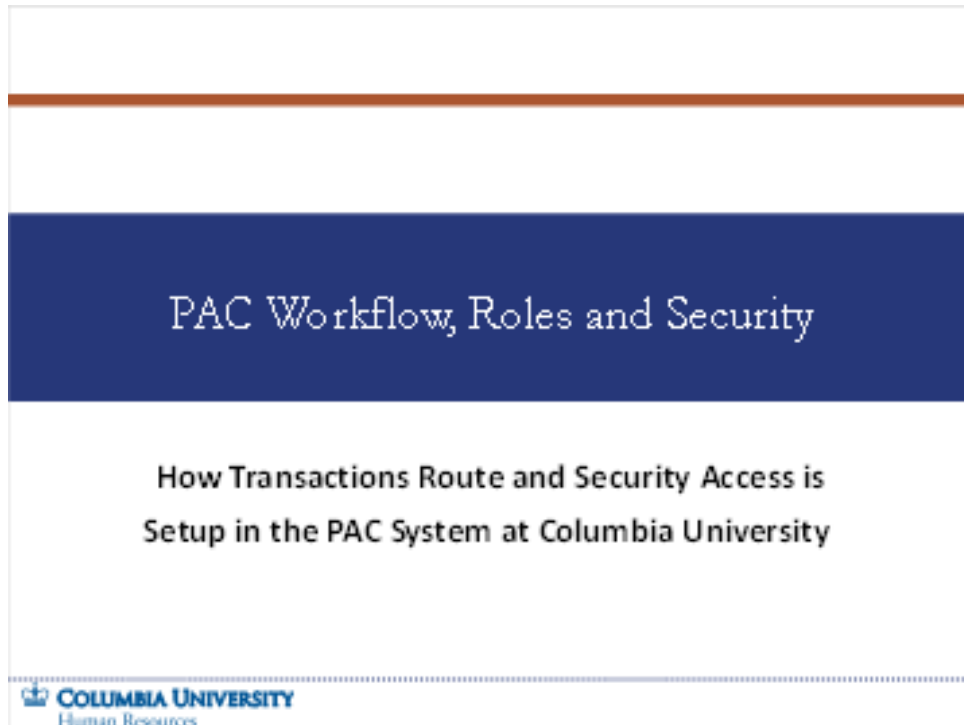
Estimated Time to Complete Module: **10 minutes**

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## Introduction Slide – PAC Workflow, Roles and Security



The slide features a dark blue rectangular box in the center containing the title "PAC Workflow, Roles and Security" in white serif font. Below this box, the subtitle "How Transactions Route and Security Access is Setup in the PAC System at Columbia University" is displayed in a smaller black sans-serif font. At the bottom left, the Columbia University Human Resources logo is visible, consisting of a small crest icon followed by the text "COLUMBIA UNIVERSITY" and "Human Resources" in a smaller font. The slide is framed by a thin orange horizontal line at the top and a thin grey horizontal line at the bottom.

**PAC Workflow, Roles and Security**

How Transactions Route and Security Access is  
Setup in the PAC System at Columbia University

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How Transactions Route and Security Access is Setup in the PAC System at Columbia University


## Slide 2 - Purpose


### Purpose

- Describe the paths that PAC transactions follow from submission to approval to entry into the PAC system.
- Review workflow roles and access.
- How to avoid workflow gaps in your department.

You should be able to complete this module in under ten (10)\* minutes.

**\*when viewing the workflows for *one* campus only. Viewing both sections takes approximately 17 minutes.**



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## Slide 3 – Topics Covered

### Topics Covered



- Workflow Definition
- PAC Workflows by Campus
  - Template-Based Hires
  - Additional Compensation Transactions
  - Salary Distribution / Retroactive Salary Distribution Transactions
  - Cost Transfer Transactions
- Workflow Roles
  - Initiator and Approver Access
  - Workflow Gaps
  - Other Workflows
- Getting Help

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- Workflow Definition
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  - Other Workflows
- Getting Help

## Slide 4 - What is a Workflow


### What is a Workflow

Workflow is the routing of transactions based on rules and is used in PAC to obtain approvals.

Each transaction type, such as Template-Based Hires, Additional Compensation Payments, Salary Distributions, Cost Transfers, or eTerminations follow specific workflows throughout their processing lifecycles.

Within each of the workflows, there are multiple levels of approvers and transactions will “stop” at each level for review and approval.

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## Slide 5 – Columbia University Irving Medical Center (CUIMC) Workflows

### Columbia University Irving Medical Center (CUIMC) Workflows

If you process transactions for CUIMC, after viewing the CUIMC workflows, navigate to the *Workflow Roles and Access* section.

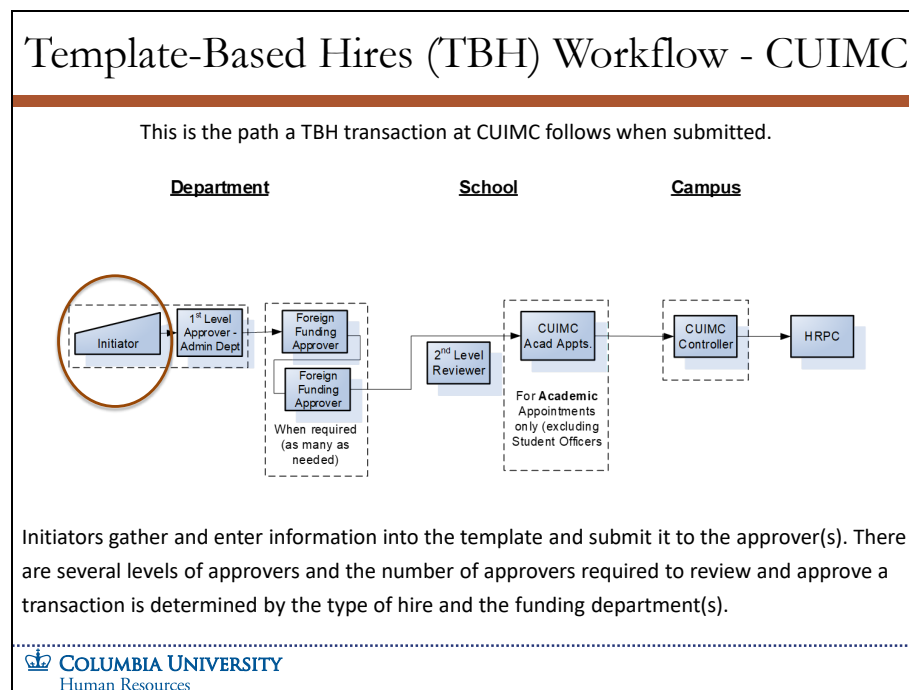
If you do not process transactions for CUIMC, skip this section and proceed to the *Morningside Workflows* section.

If you process transactions for CUIMC, after viewing the CUIMC workflows, navigate to the Workflow Roles and Access section.

If you do not process transactions for CUIMC, skip this section and proceed to the Morningside Workflows section.



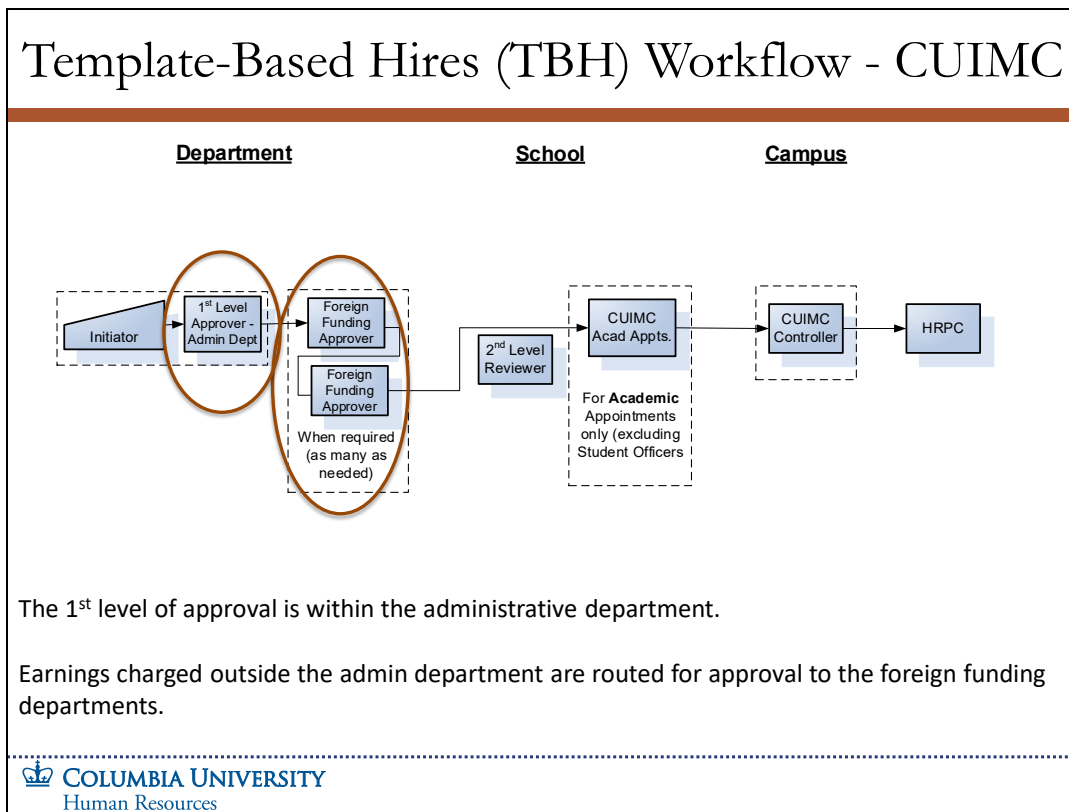
## Slide 6 – Template-Based Hires (TBH) Workflow - CUIMC



This is the path a TBH transaction at CUIMC follows when submitted.

Initiators gather and enter information into the template and submit it to the approver(s). There are several levels of approvers and the number of approvers required to review and approve a transaction is determined by the type of hire and the funding department(s).

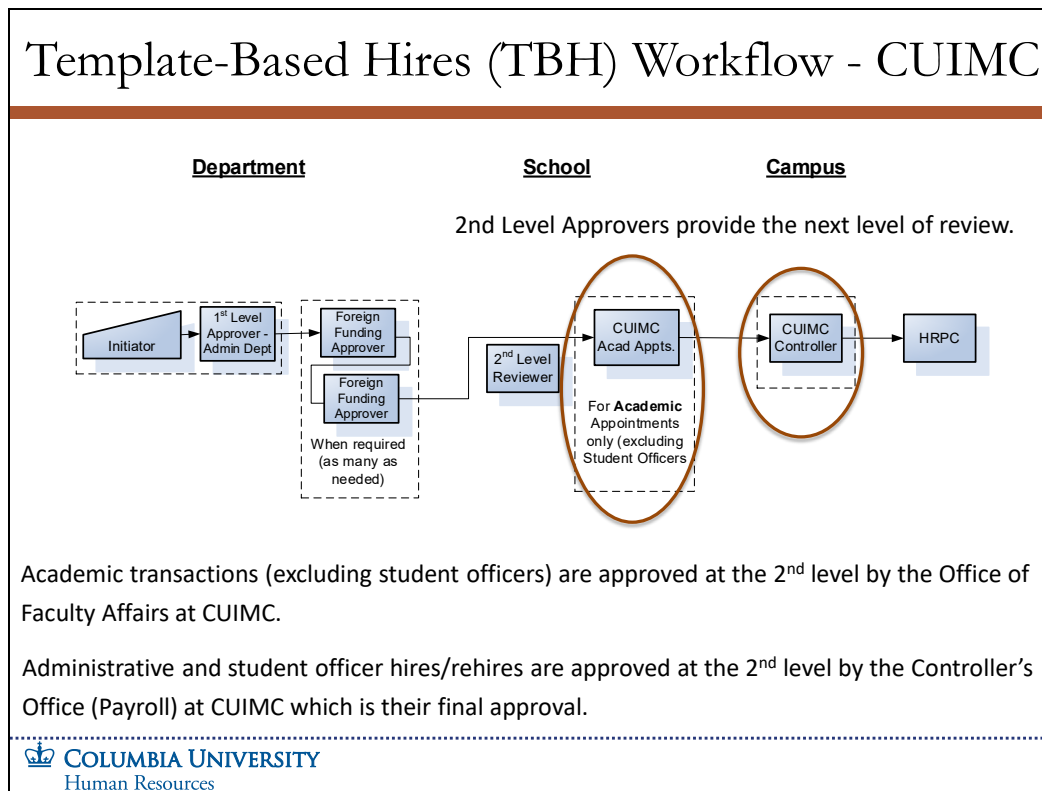
## Slide 7 – Template-Based Hires (TBH) Workflow - CUIMC



The 1<sup>st</sup> level of approval is within the administrative department.

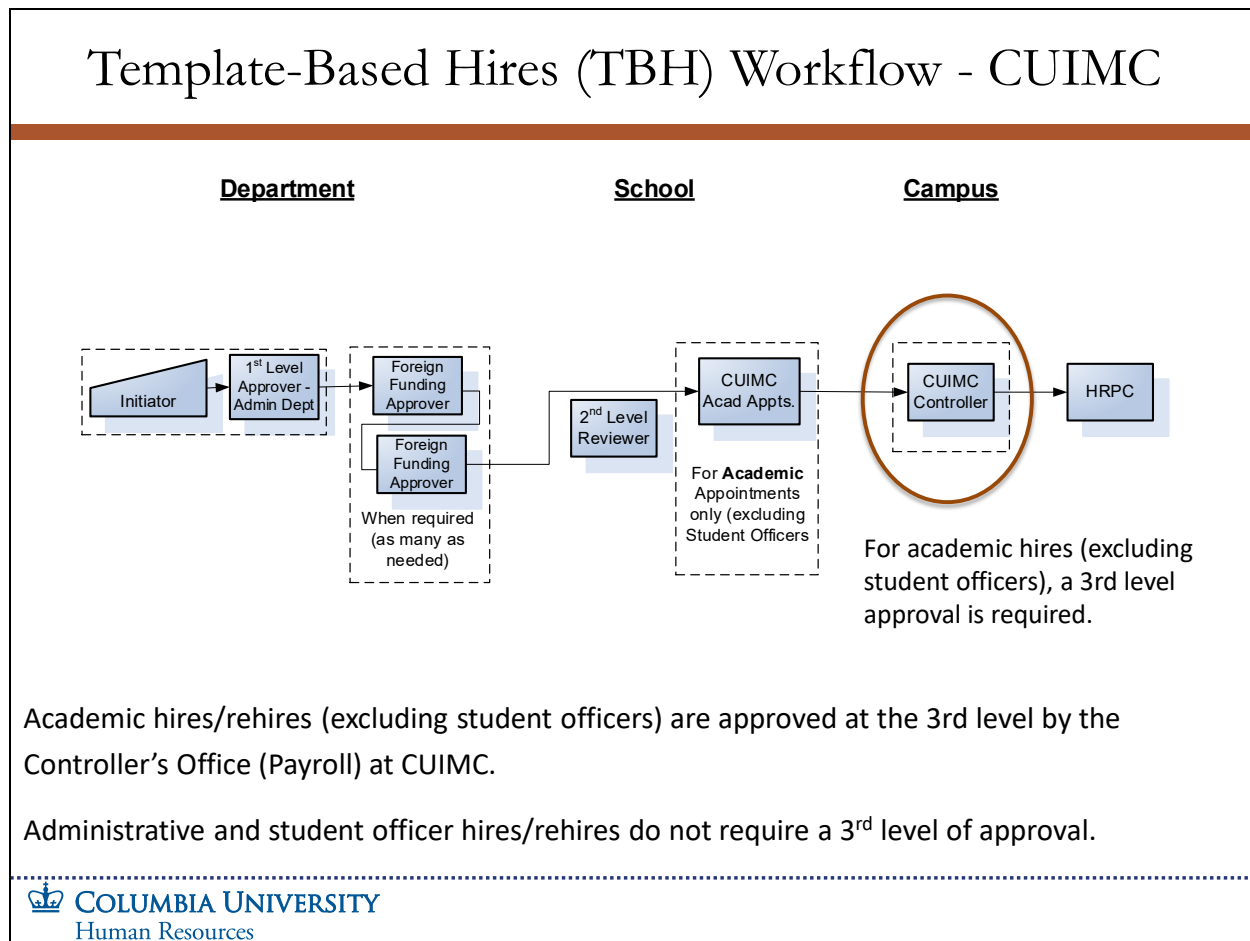
Earnings charged outside the admin department are routed for approval to the foreign funding departments.

## Slide 8 – Template-Based Hires (TBH) Workflow - CUIMC



Academic transactions (excluding student officers) are approved at the 2nd level by the Office of Faculty Affairs at CUIMC.

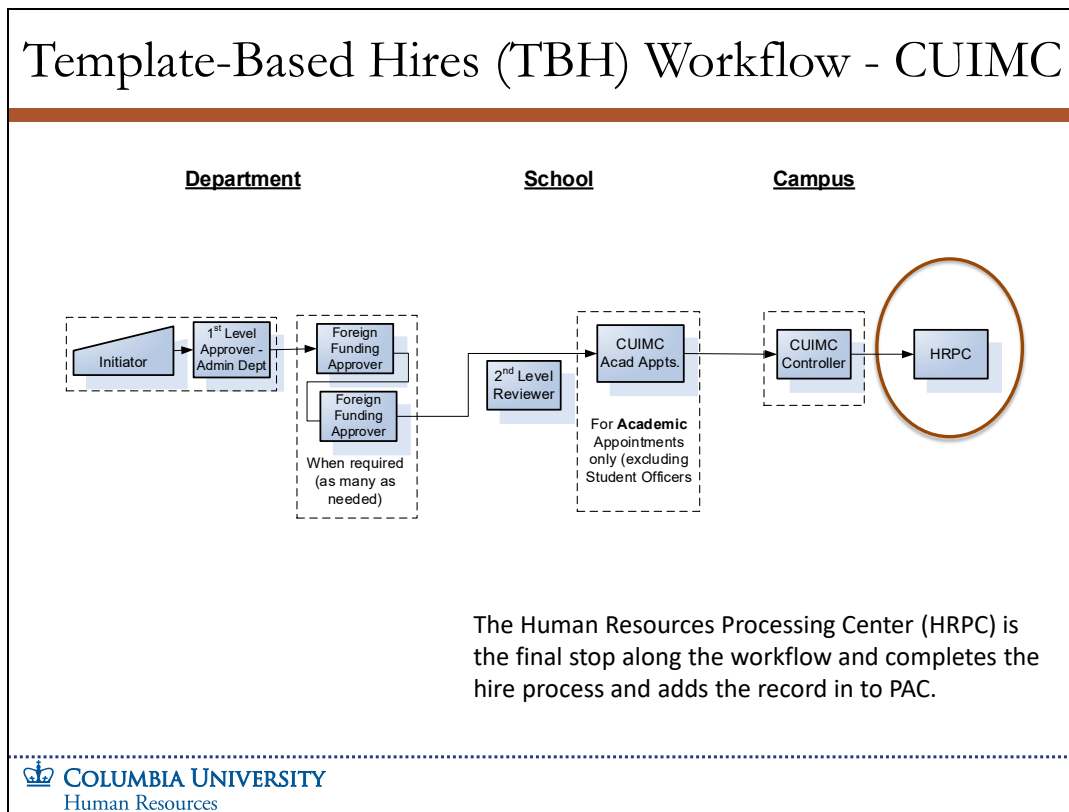
Administrative and student officer hires/rehires are approved at the 2nd level by the Controller's Office (Payroll) at CUIMC which is their final approval.



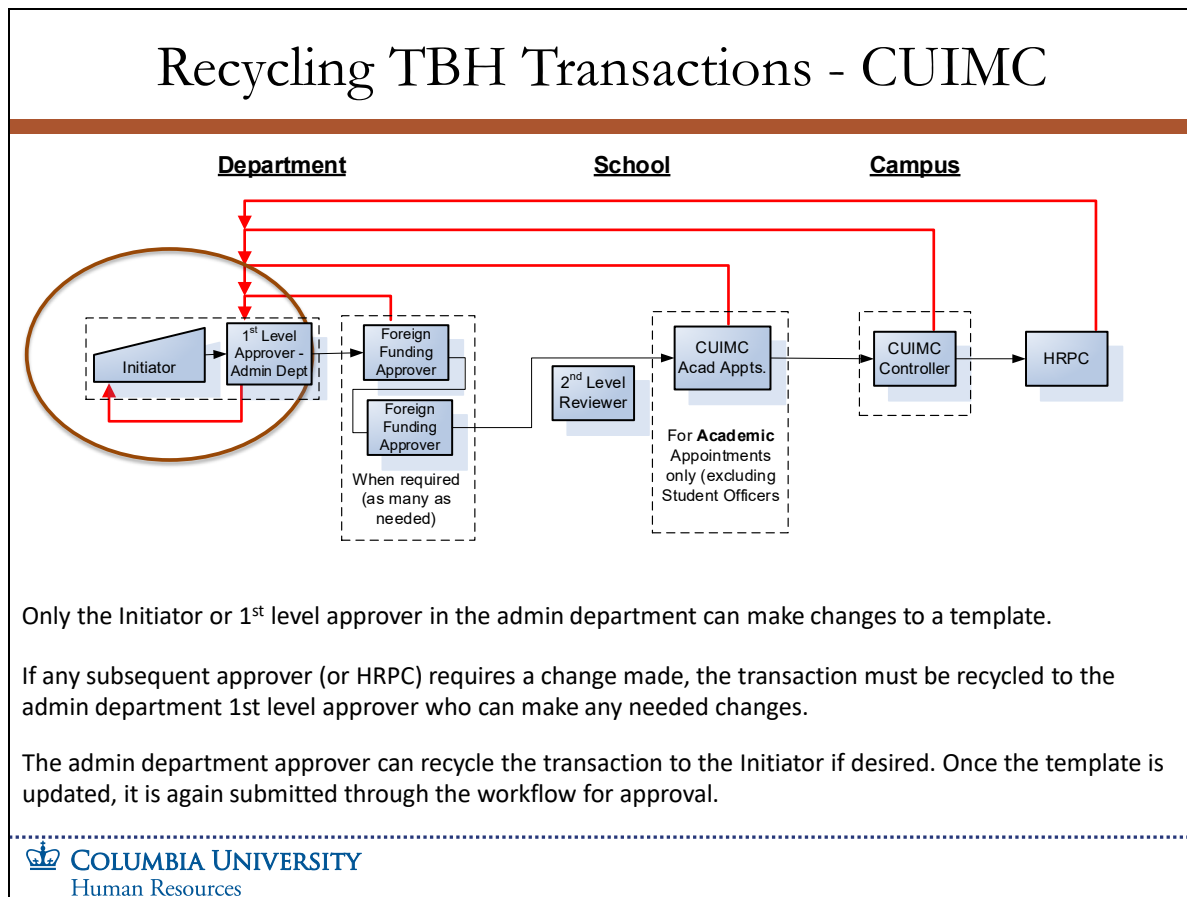
For academic hires (excluding student officers), a 3rd level approval is required.

Academic hires/rehires (excluding student officers) are approved at the 3rd level by the Controller's Office (Payroll) at CUIMC.

Administrative and student officer hires/rehires do not require a 3rd level of approval.



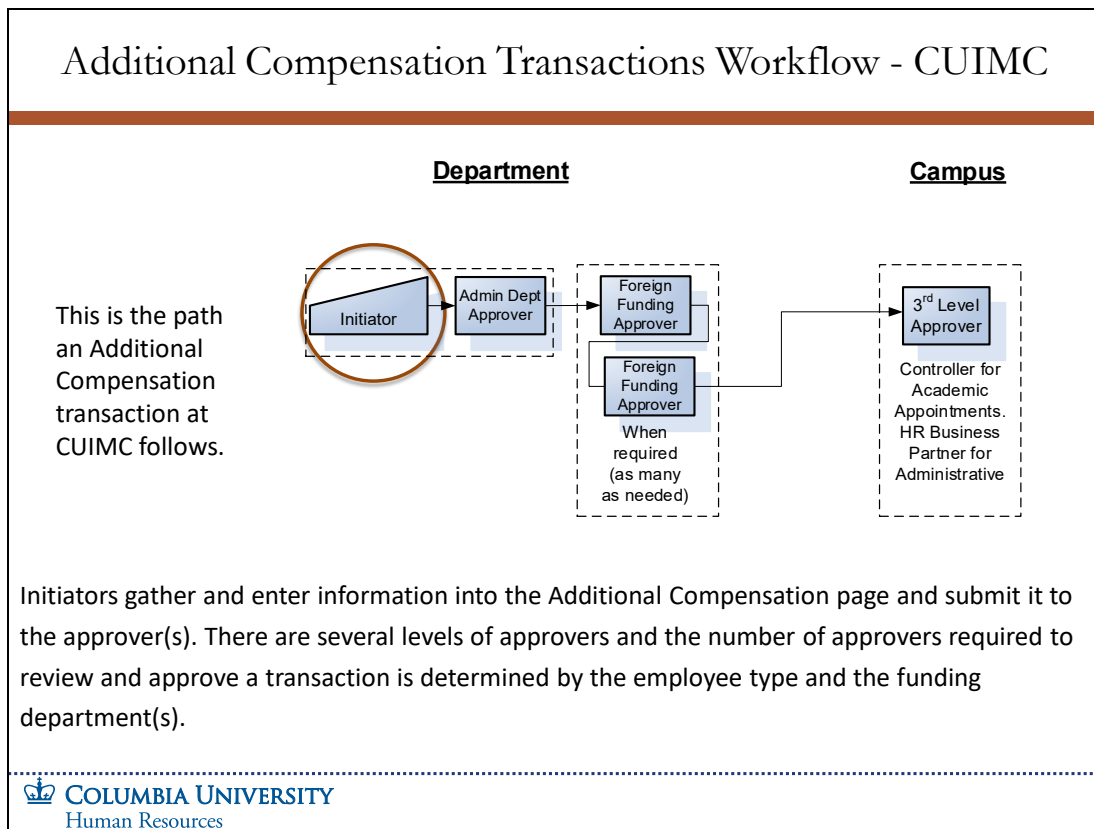
The Human Resources Processing Center (HRPC) is the final stop along the workflow and completes the hire process and adds the record in to PAC.



Only the Initiator or 1st level approver in the admin department can make changes to a template.

If any subsequent approver (or HRPC) requires a change made, the transaction must be recycled to the admin department 1st level approver who can make any needed changes.

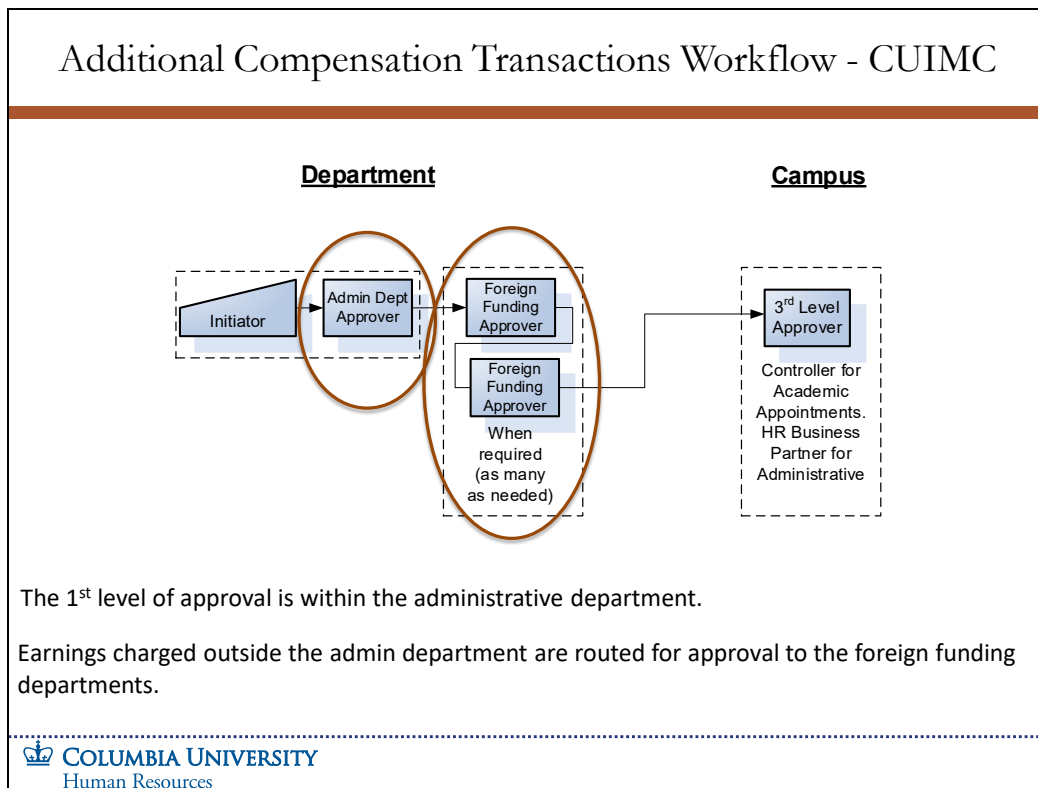
The admin department approver can recycle the transaction to the Initiator if desired. Once the template is updated, it is again submitted through the workflow for approval.



This is the path an Additional Compensation transaction at CUIMC follows.

Initiators gather and enter information into the Additional Compensation page and submit it to the approver(s). There are several levels of approvers and the number of approvers required to review and approve a transaction is determined by the employee type and the funding department(s).

## Slide 13 - Additional Compensation Transactions Workflow – CUIMC

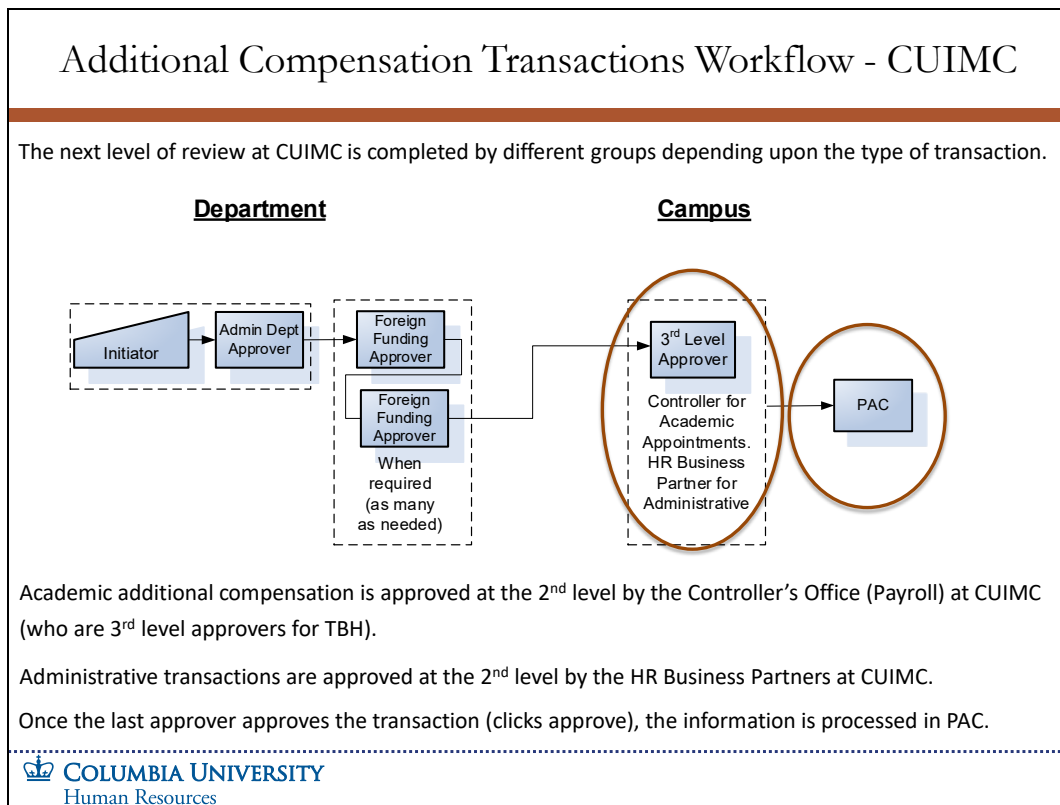


The 1st level of approval is within the administrative department.

Earnings charged outside the admin department are routed for approval to the foreign funding departments.



## Slide 14 - Additional Compensation Transactions Workflow – CUIMC



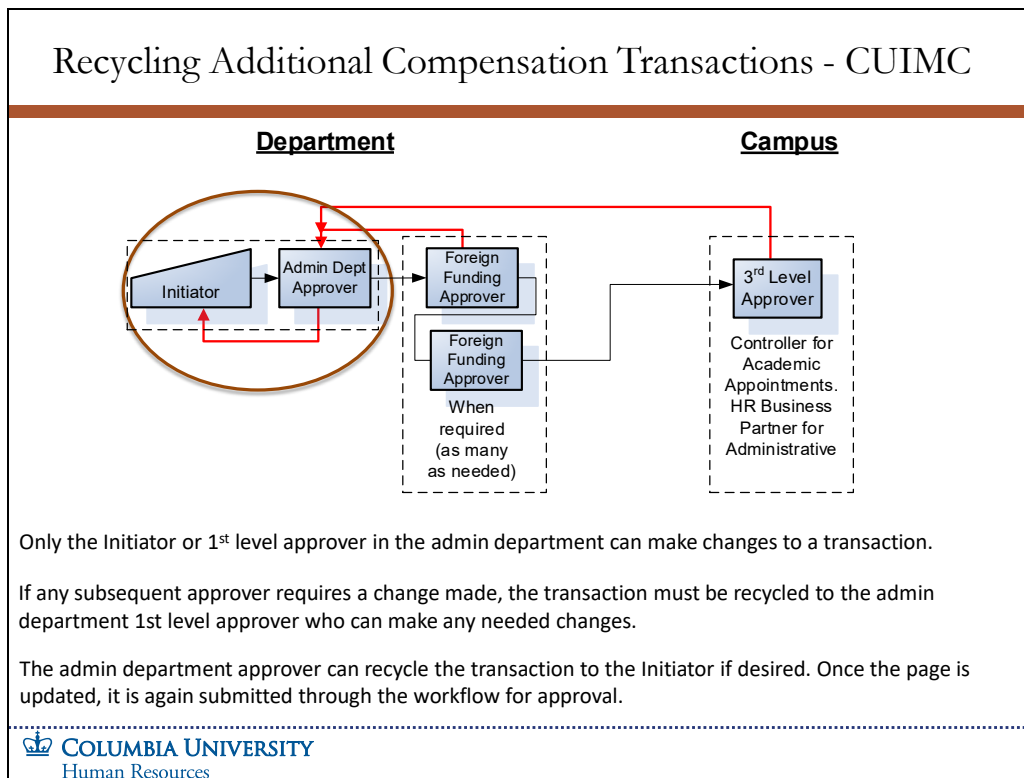
The next level of review at CUIMC is completed by different groups depending upon the type of transaction.

Academic additional compensation is approved at the 2<sup>nd</sup> level by the Controller's Office (Payroll) at CUIMC (who are 3<sup>rd</sup> level approvers for TBH).

Administrative transactions are approved at the 2<sup>nd</sup> level by the HR Business Partners at CUIMC.

Once the last approver approves the transaction (clicks approve), the information is processed in PAC.

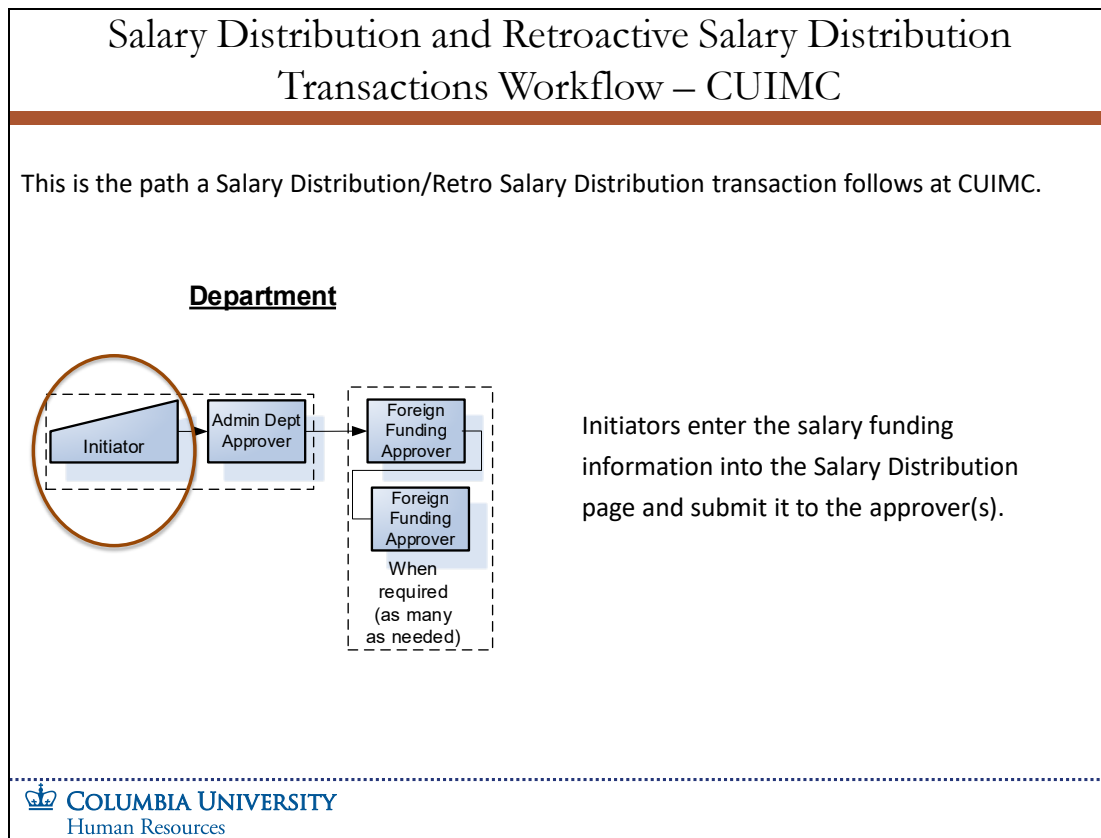
## Slide 15 - Recycling Additional Compensation Transactions – CUIMC



Only the Initiator or 1st level approver in the admin department can make changes to a transaction.

If any subsequent approver requires a change made, the transaction must be recycled to the admin department 1st level approver who can make any needed changes.

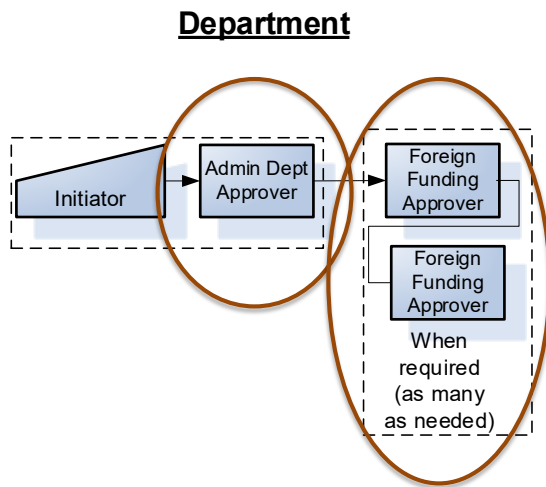
The admin department approver can recycle the transaction to the Initiator if desired. Once the page is updated, it is again submitted through the workflow for approval.



This is the path a Salary Distribution/Retro Salary Distribution transaction follows at CUIMC.

Initiators enter the salary funding information into the Salary Distribution page and submit it to the approver(s).

## Salary Distribution and Retroactive Salary Distribution Transactions Workflow – CUIMC

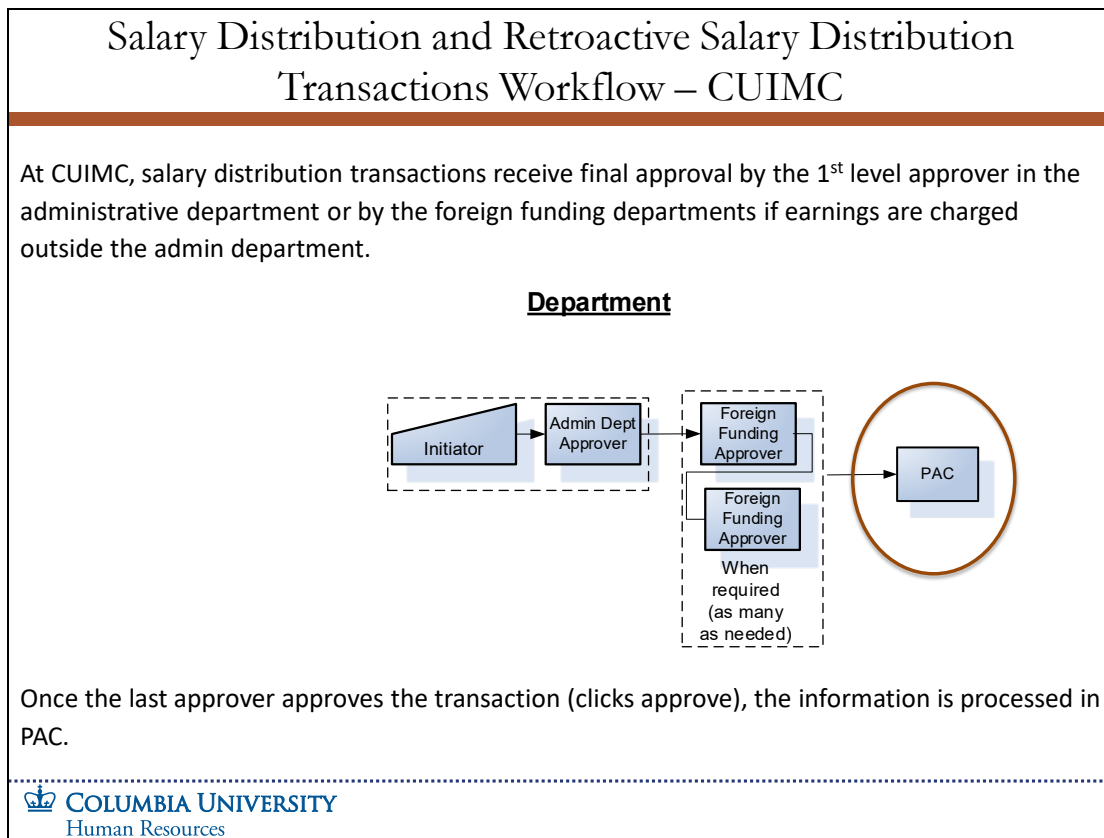


The 1<sup>st</sup> level of approval is within the administrative department.

Earnings charged outside the admin department are routed for approval to the foreign funding departments.

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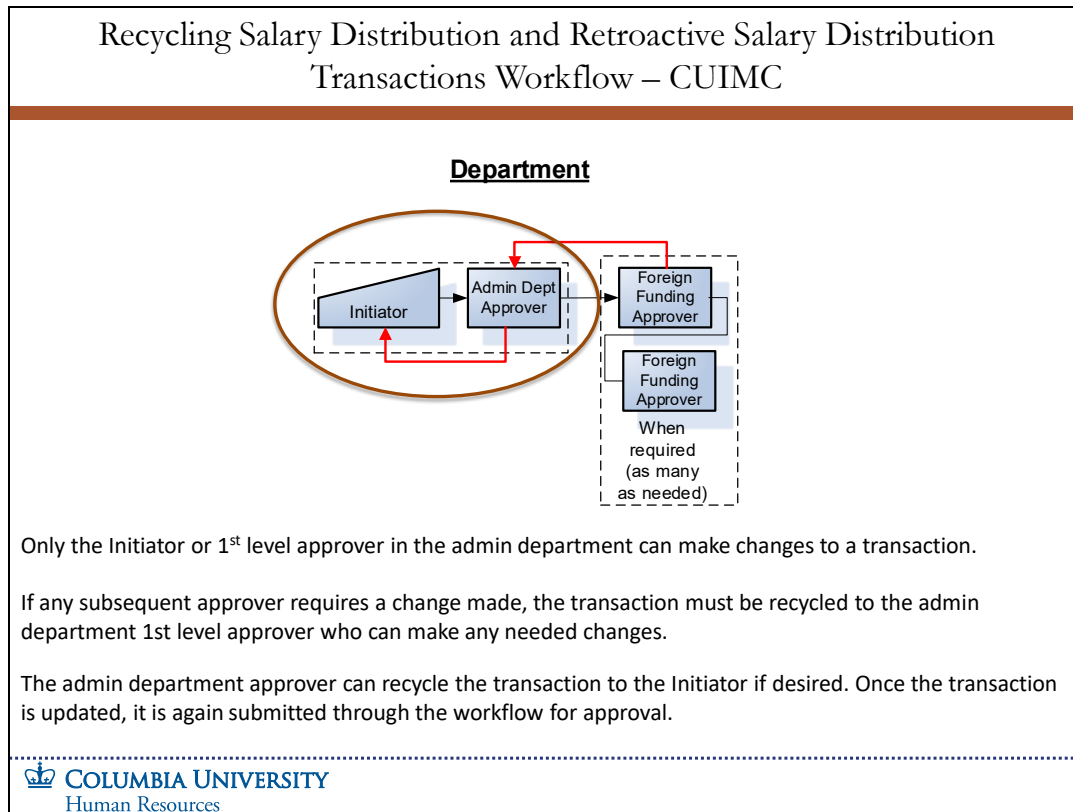
Earnings charged outside the admin department are routed for approval to the foreign funding departments.



At CUIMC, salary distribution transactions receive final approval by the 1<sup>st</sup> level approver in the administrative department or by the foreign funding departments if earnings are charged outside the admin department.

Once the last approver approves the transaction (clicks approve), the information is processed in PAC.

## Slide 19 - Recycling Salary Distribution and Retroactive Salary Distribution Transactions Workflow – CUIMC

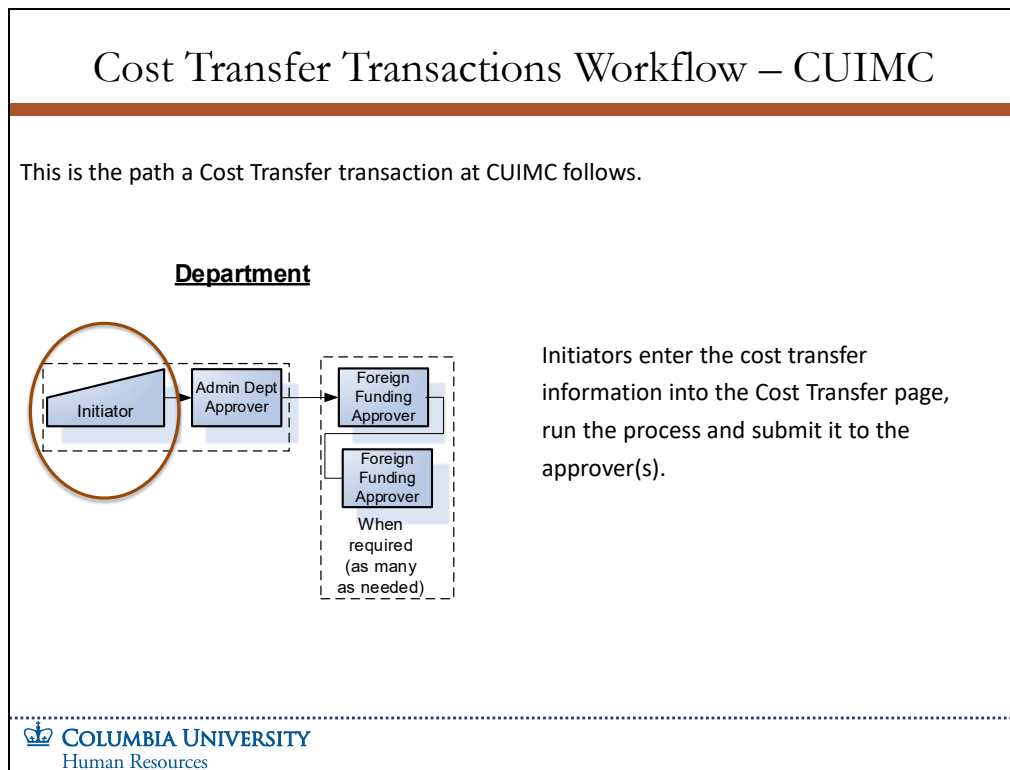


Only the Initiator or 1<sup>st</sup> level approver in the admin department can make changes to a transaction.

If any subsequent approver requires a change made, the transaction must be recycled to the admin department 1st level approver who can make any needed changes.

The admin department approver can recycle the transaction to the Initiator if desired. Once the transaction is updated, it is again submitted through the workflow for approval.

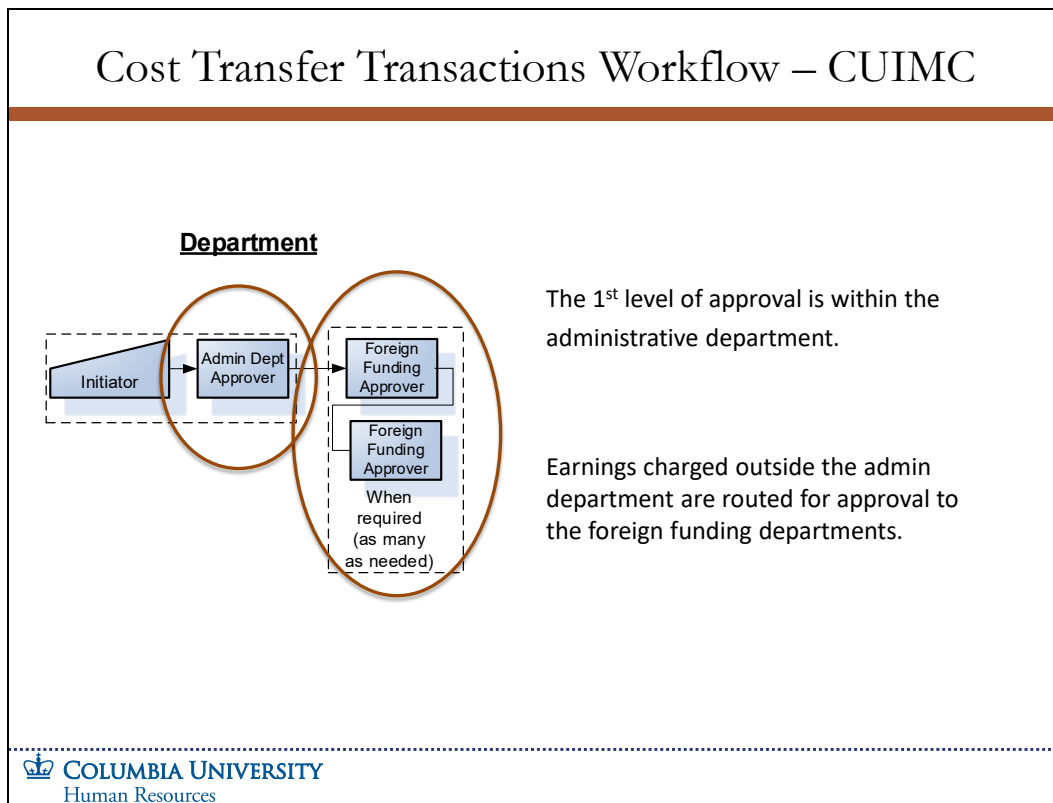
## Slide 20 - Cost Transfer Transactions Workflow – CUIMC



This is the path a Cost Transfer transaction at CUIMC follows.

Initiators enter the cost transfer information into the Cost Transfer page, run the process and submit it to the approver(s).

## Slide 21 - Cost Transfer Transactions Workflow – CUIMC



The 1<sup>st</sup> level of approval is within the administrative department.

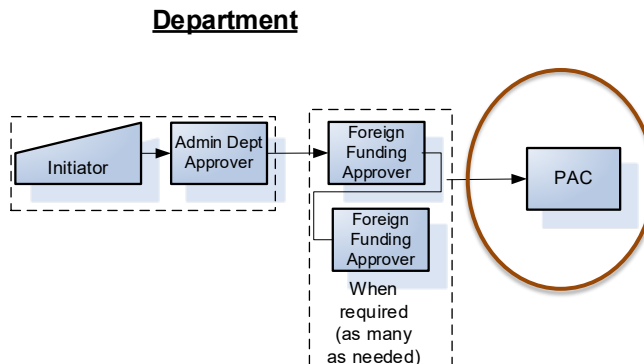
Earnings charged outside the admin department are routed for approval to the foreign funding departments.



## Cost Transfer Transactions Workflow – CUIMC

At CUIMC, cost transfer transactions receive final approval by the 1<sup>st</sup> level approver in the administrative department or by the foreign funding departments if earnings are charged outside the admin department.

Once the last approver approves the transaction (clicks approve), the information is processed in PAC.



Cost transfer transactions can only be approved or denied. Because they are a process and not a data entry page, they cannot be recycled or modified once created. They can only be deleted, and a new transaction can be created.

At CUIMC, cost transfer transactions receive final approval by the 1<sup>st</sup> level approver in the administrative department or by the foreign funding departments if earnings are charged outside the admin department.

Once the last approver approves the transaction (clicks approve), the information is processed in PAC.

Cost transfer transactions can only be approved or denied. Because they are a process and not a data entry page, they cannot be recycled or modified once created. They can only be deleted, and a new transaction can be created.

## Slide 23 - Morningside/Lamont Doherty/Nevis Labs Workflows


### Morningside/Lamont Doherty/Nevis Labs Workflows

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When referred to as Morningside, includes the Lamont Doherty Earth Observatory and Nevis Labs.

If you do not process transactions for the Morningside campus, skip this section and proceed to the *Workflow Roles and Access* Section.

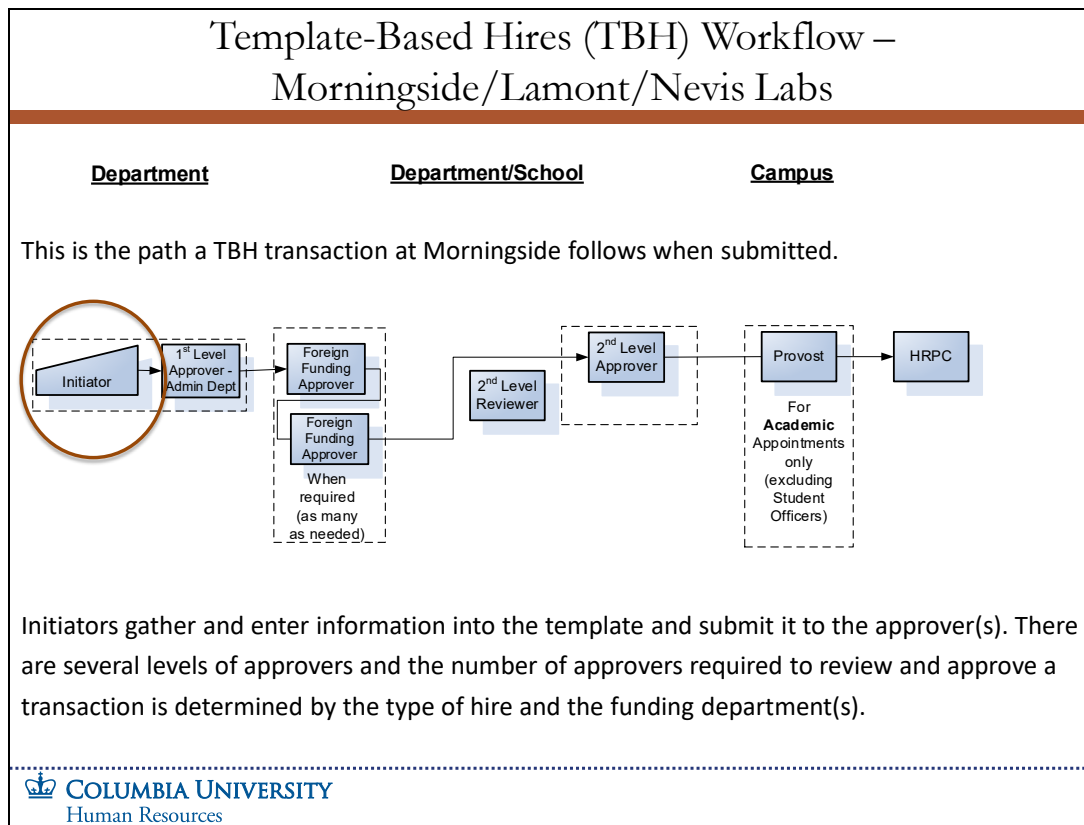
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If you do not process transactions for the Morningside campus, skip this section and proceed to the *Workflow Roles and Access* Section.

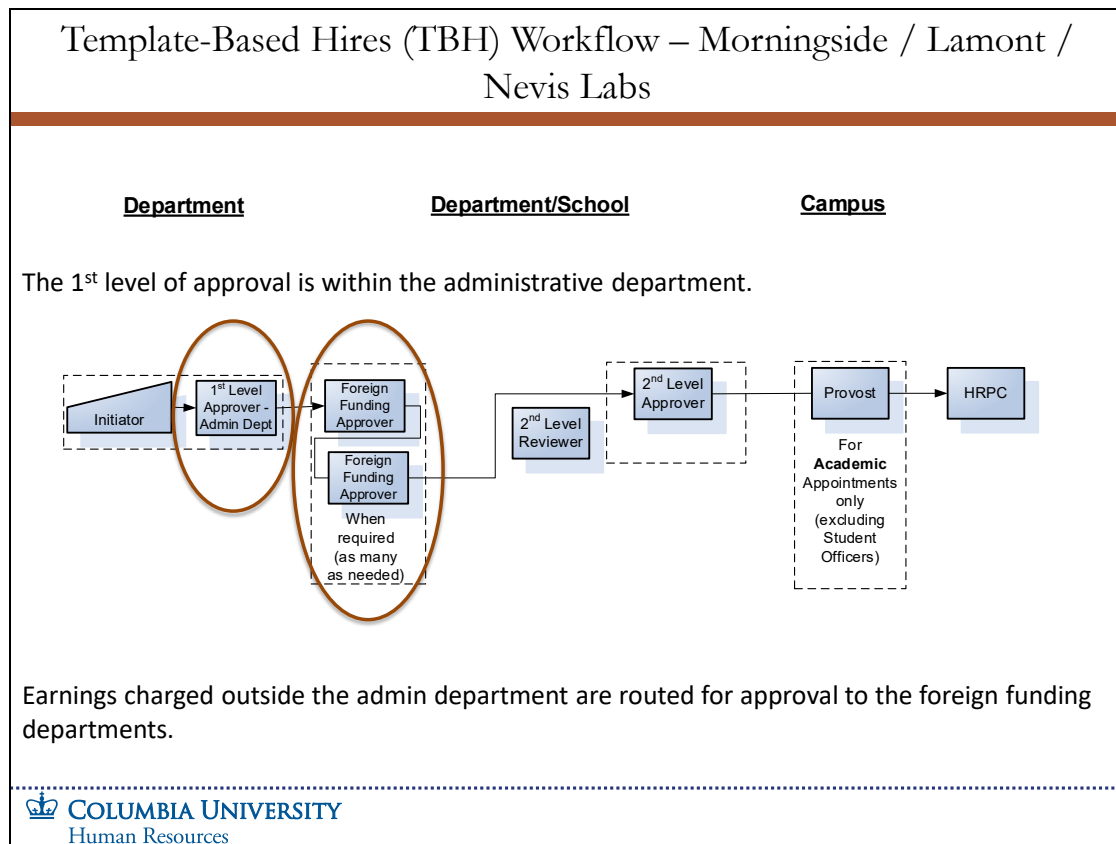
## Slide 24 - Template-Based Hires (TBH) Workflow – Morningside/Lamont/Nevis Labs



This is the path a TBH transaction at Morningside follows when submitted.

Initiators gather and enter information into the template and submit it to the approver(s). There are several levels of approvers and the number of approvers required to review and approve a transaction is determined by the type of hire and the funding department(s).

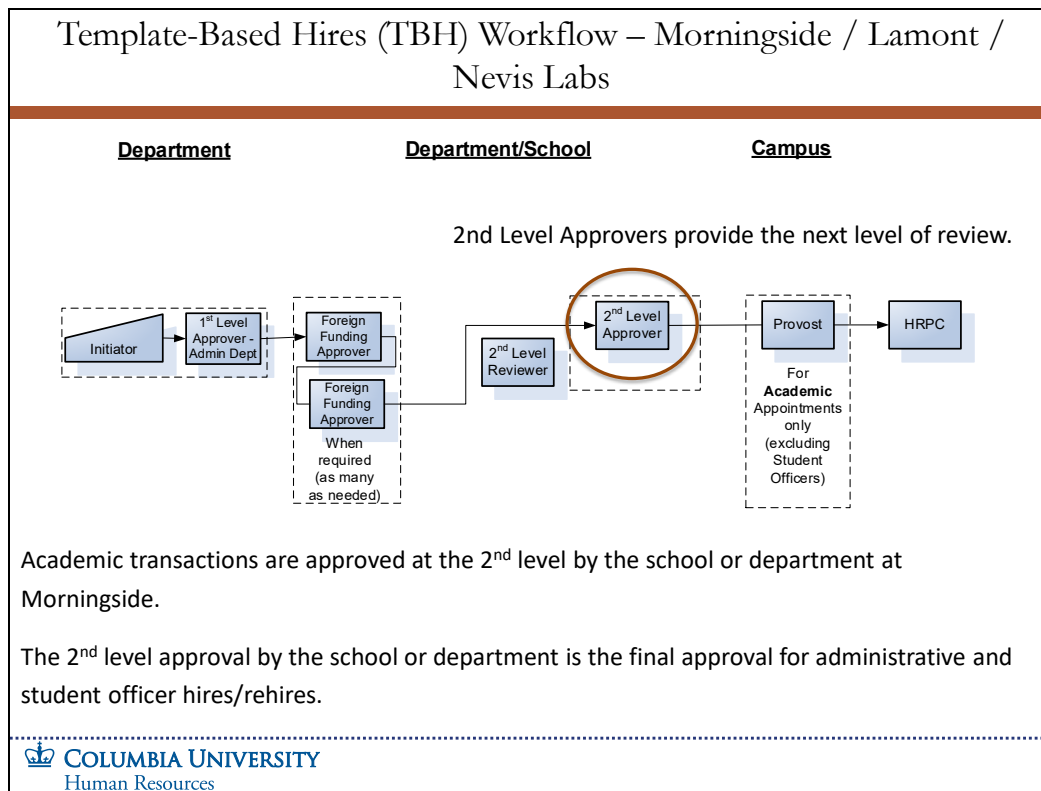
Slide 25 - Template-Based Hires (TBH) Workflow – Morningside/Lamont/Nevis Labs



The 1<sup>st</sup> level of approval is within the administrative department.

Earnings charged outside the admin department are routed for approval to the foreign funding departments.

## Slide 26 - Template-Based Hires (TBH) Workflow – Morningside / Lamont / Nevis Labs

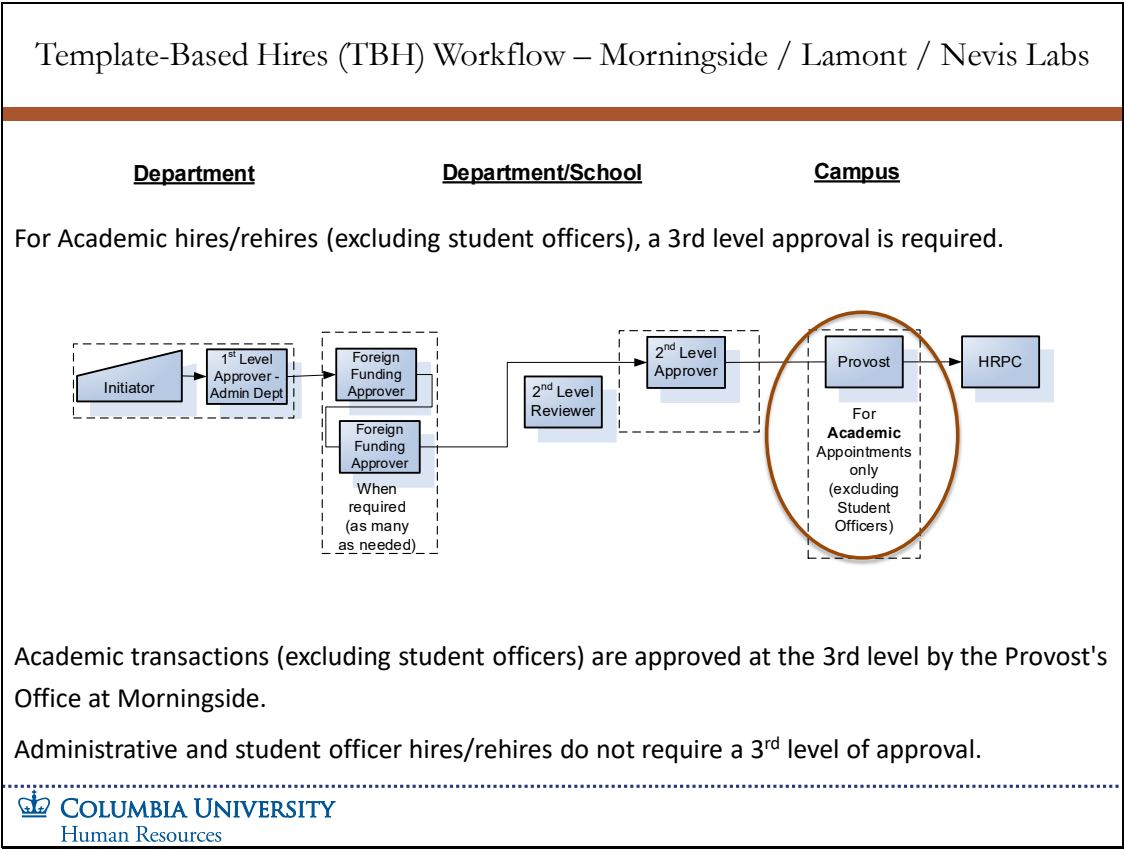


2nd Level Approvers provide the next level of review.

Academic transactions are approved at the 2<sup>nd</sup> level by the school or department at Morningside.

The 2<sup>nd</sup> level approval by the school or department is the final approval for administrative and student officer hires/rehires.

Slide 27 – Template-Based Hires (TBH) Workflow – Morningside / Lamont / Nevis Labs

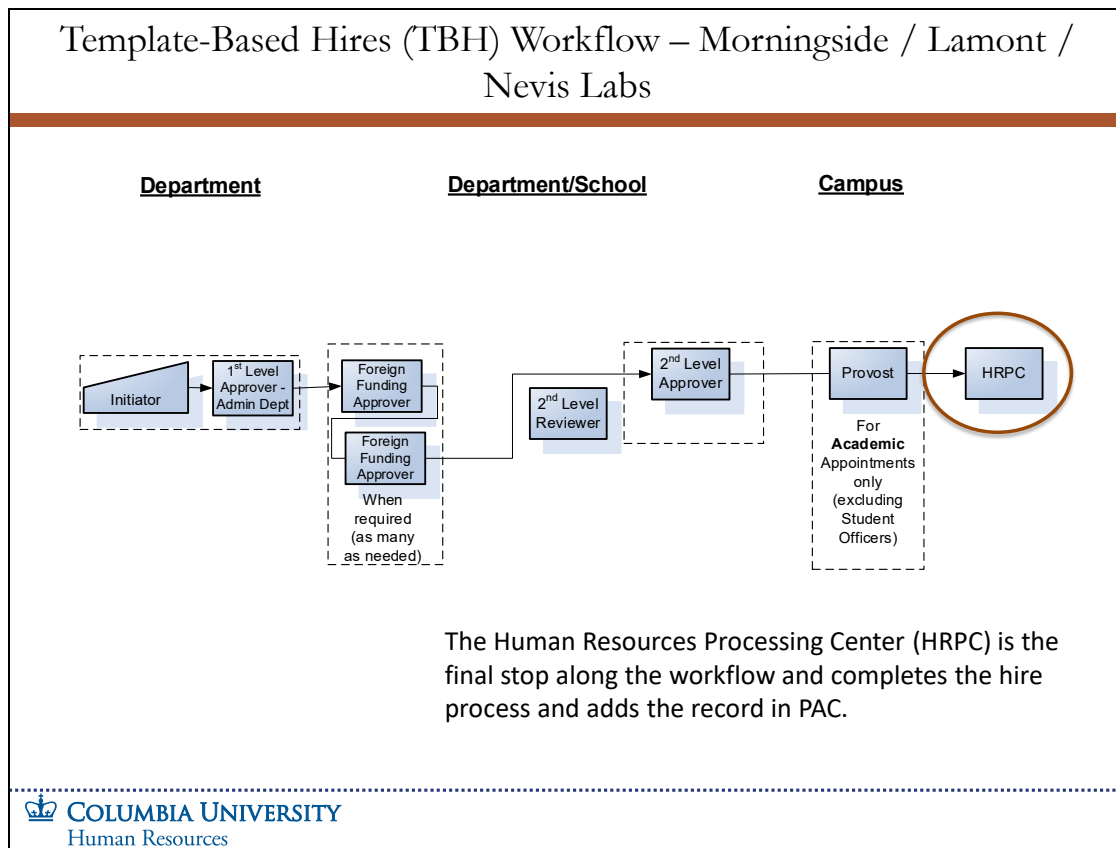


For Academic hires/rehires (excluding student officers), a 3rd Level Approval is required.

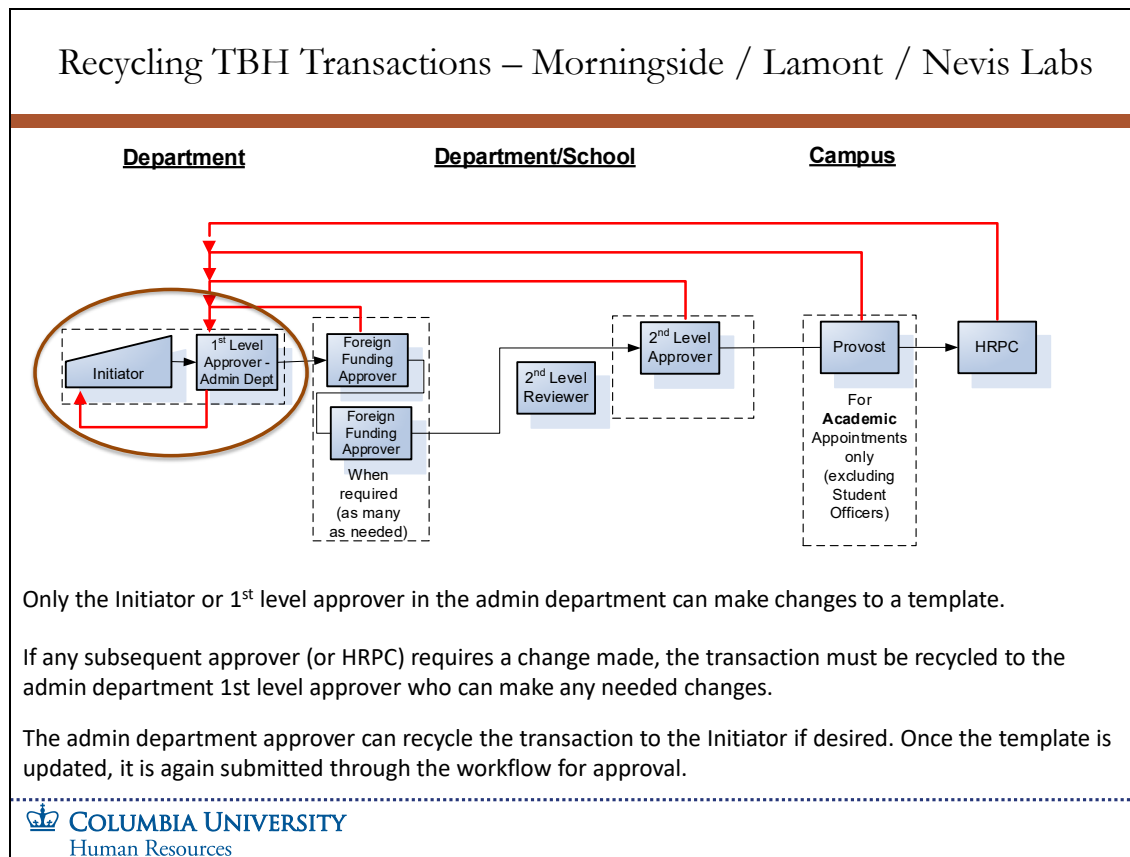
Academic transactions are approved at the 3rd level by the Provost's Office at Morningside.

Administrative and student officer hires/rehires do not require a 3<sup>rd</sup> level of approval.

Slide 28 – Template-Based Hires (TBH) Workflow – Morningside / Lamont / Nevis Labs



The Human Resources Processing Center (HRPC) is the final stop along the workflow and completes the hire process and adds the record in PAC.

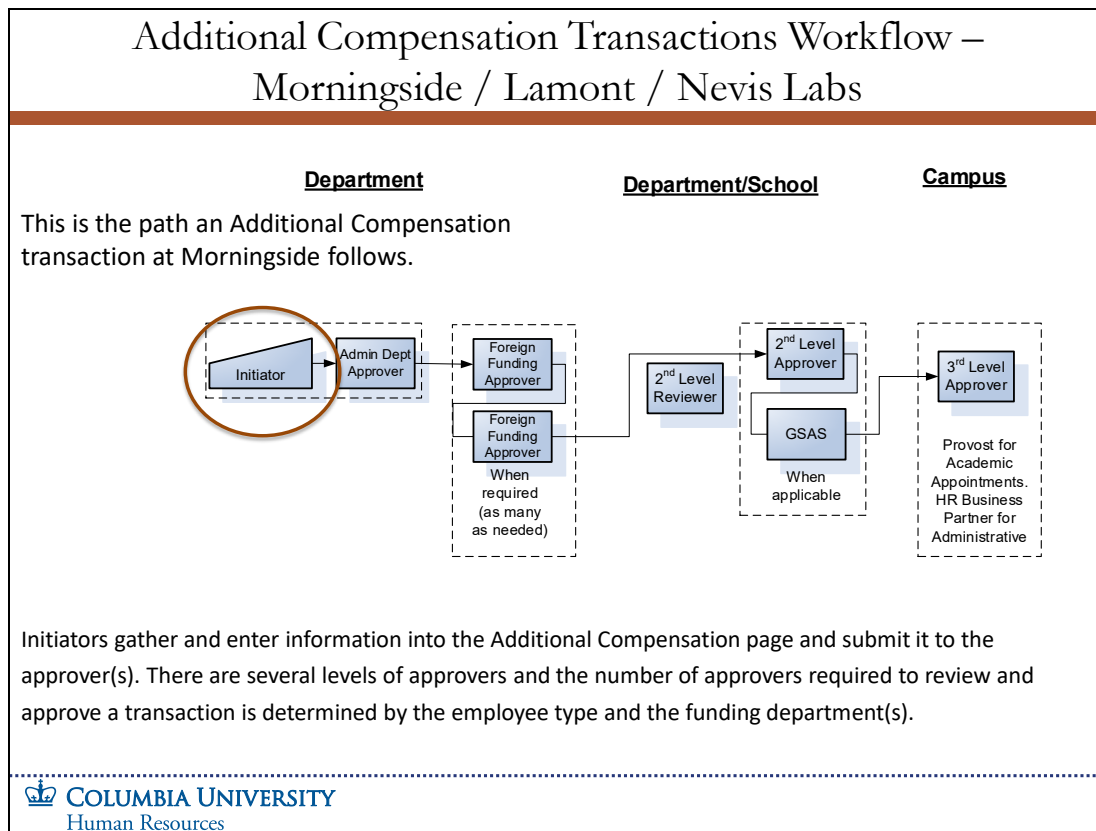


Only the Initiator or 1<sup>st</sup> level approver in the admin department can make changes to a template.

If any subsequent approver (or HRPC) requires a change made, the transaction must be recycled to the admin department 1st level approver who can make any needed changes.

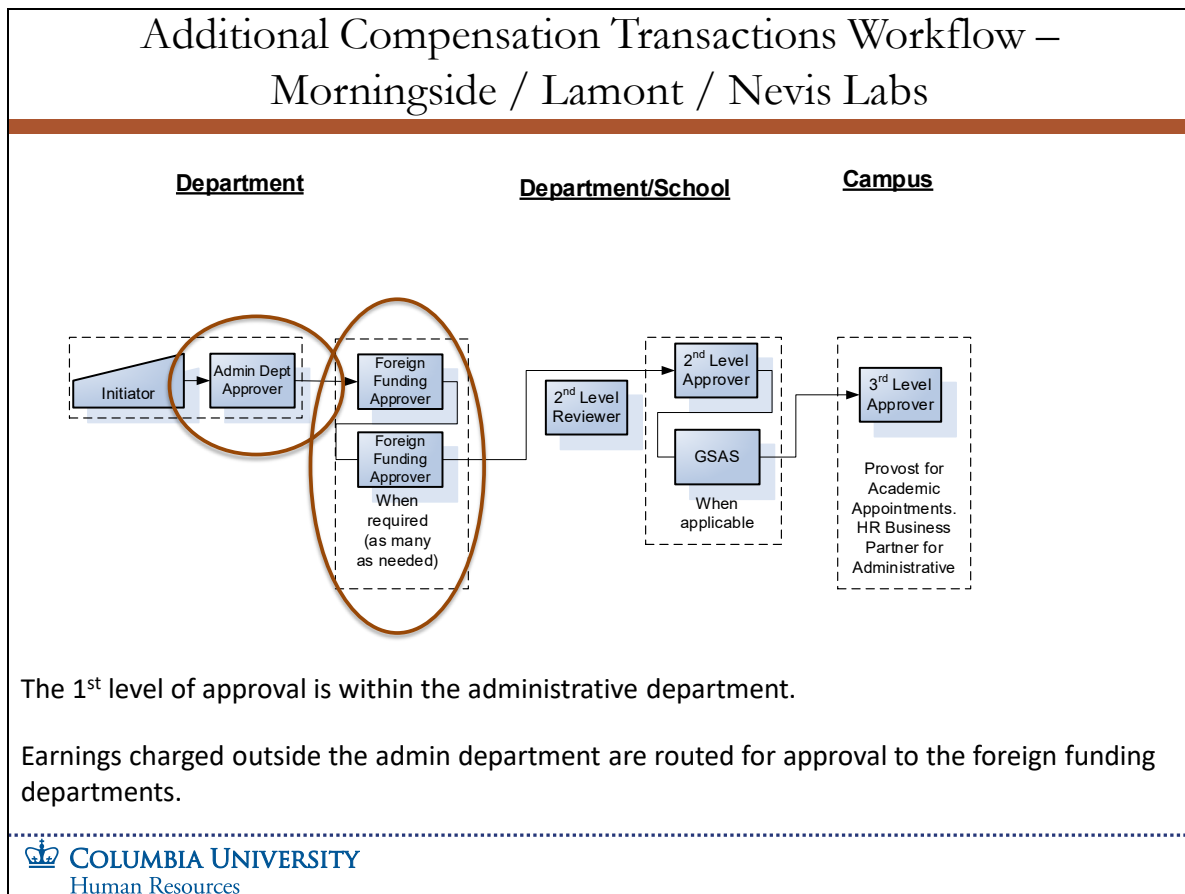
The admin department approver can recycle the transaction to the Initiator if desired. Once the template is updated, it is again submitted through the workflow for approval.





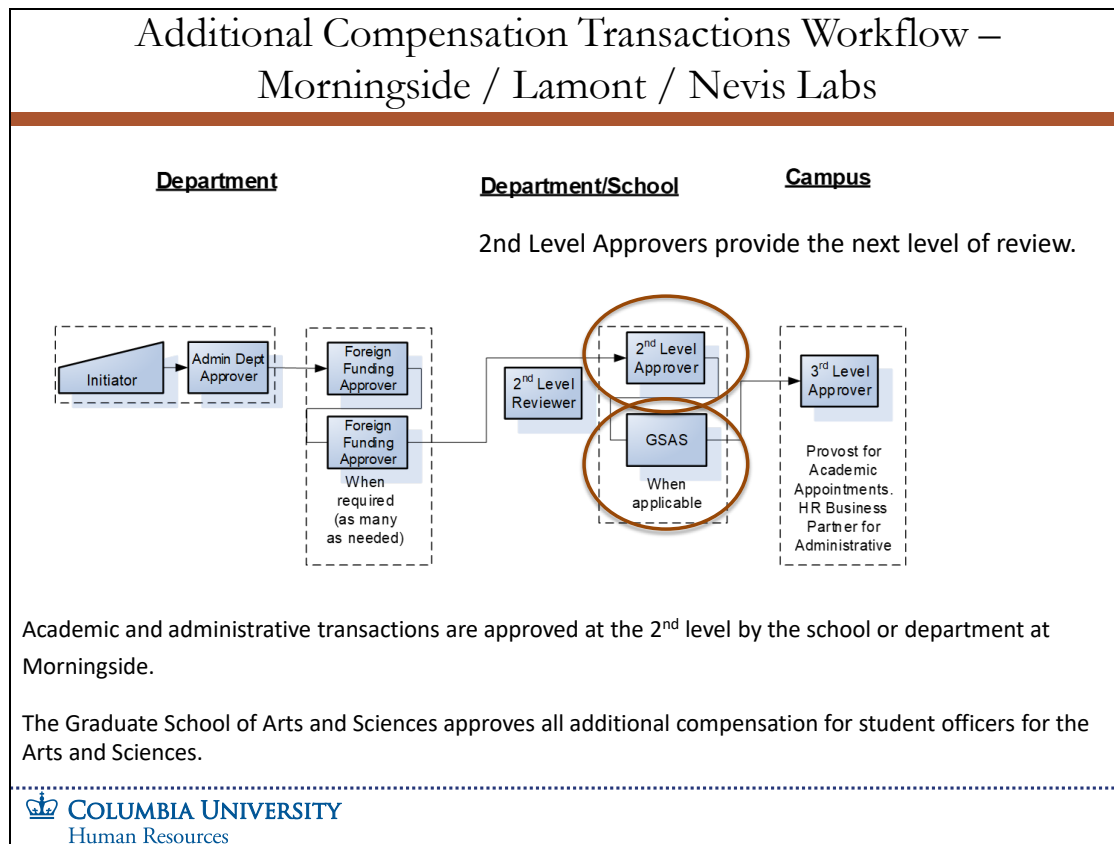
This is the path an Additional Compensation transaction at Morningside follows.

Initiators gather and enter information into the Additional Compensation page and submit it to the approver(s). There are several levels of approvers and the number of approvers required to review and approve a transaction is determined by the employee type and the funding department(s).



The 1<sup>st</sup> level of approval is within the administrative department.

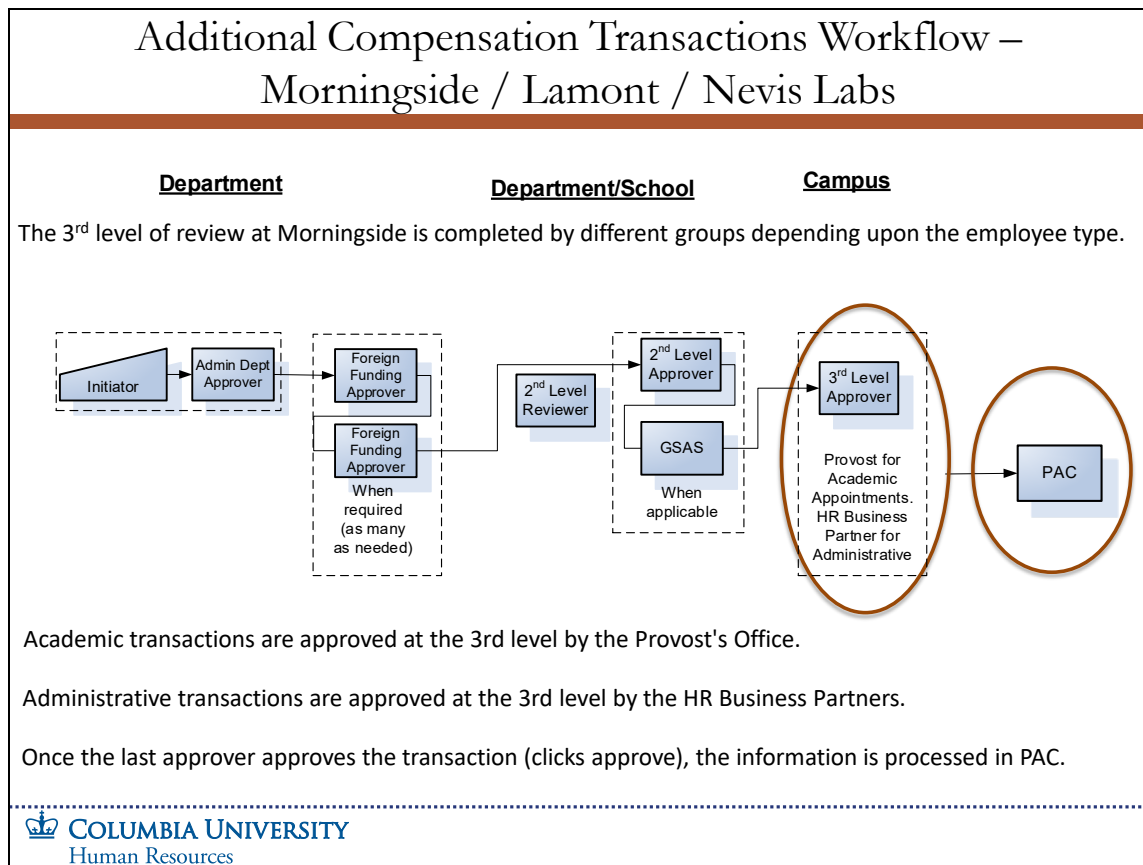
Earnings charged outside the admin department are routed for approval to the foreign funding departments.



2nd Level Approvers provide the next level of review.

Academic and administrative transactions are approved at the 2<sup>nd</sup> level by the school or department at Morningside.

The Graduate School of Arts and Sciences approves all additional compensation for student officers for the Arts and Sciences.

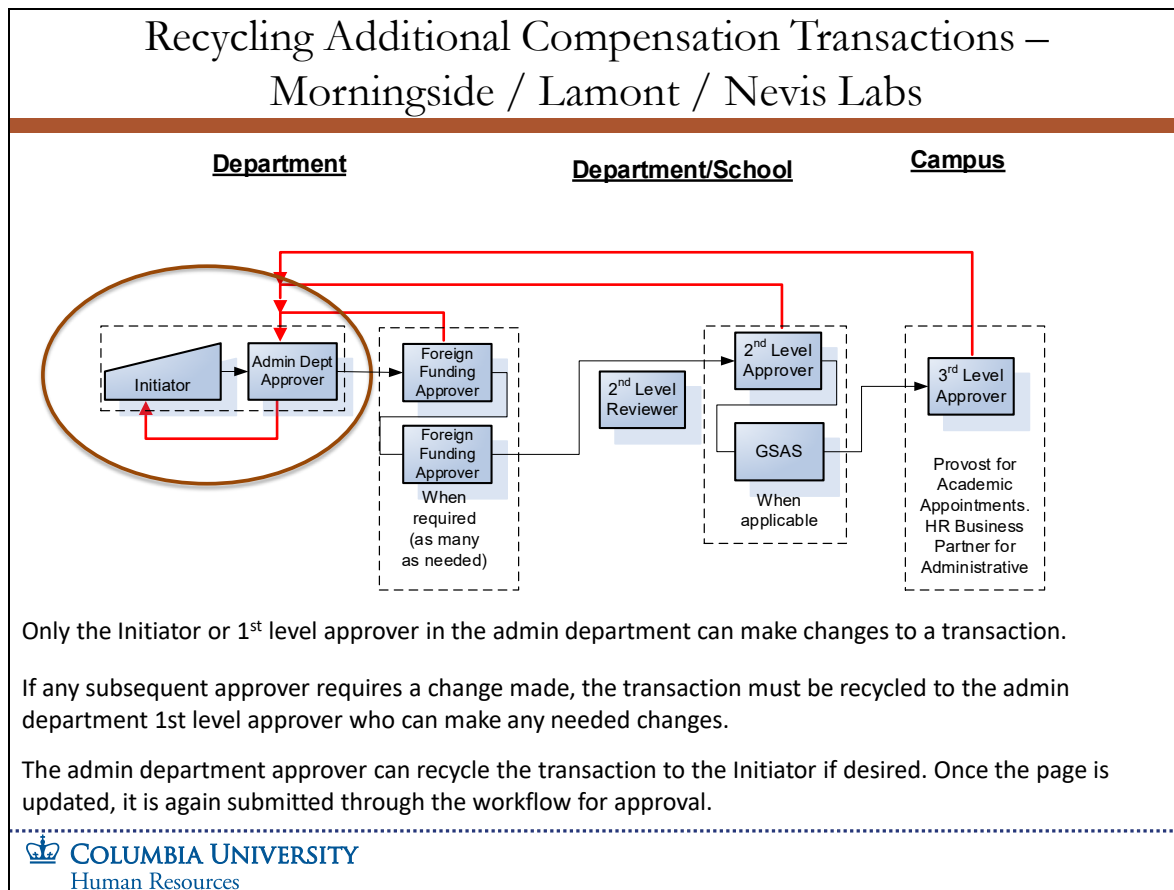


The 3<sup>rd</sup> level of review at Morningside is completed by different groups depending upon the employee type.

Academic transactions are approved at the 3<sup>rd</sup> level by the Provost's Office.

Administrative transactions are approved at the 3<sup>rd</sup> level by the HR Business Partners.

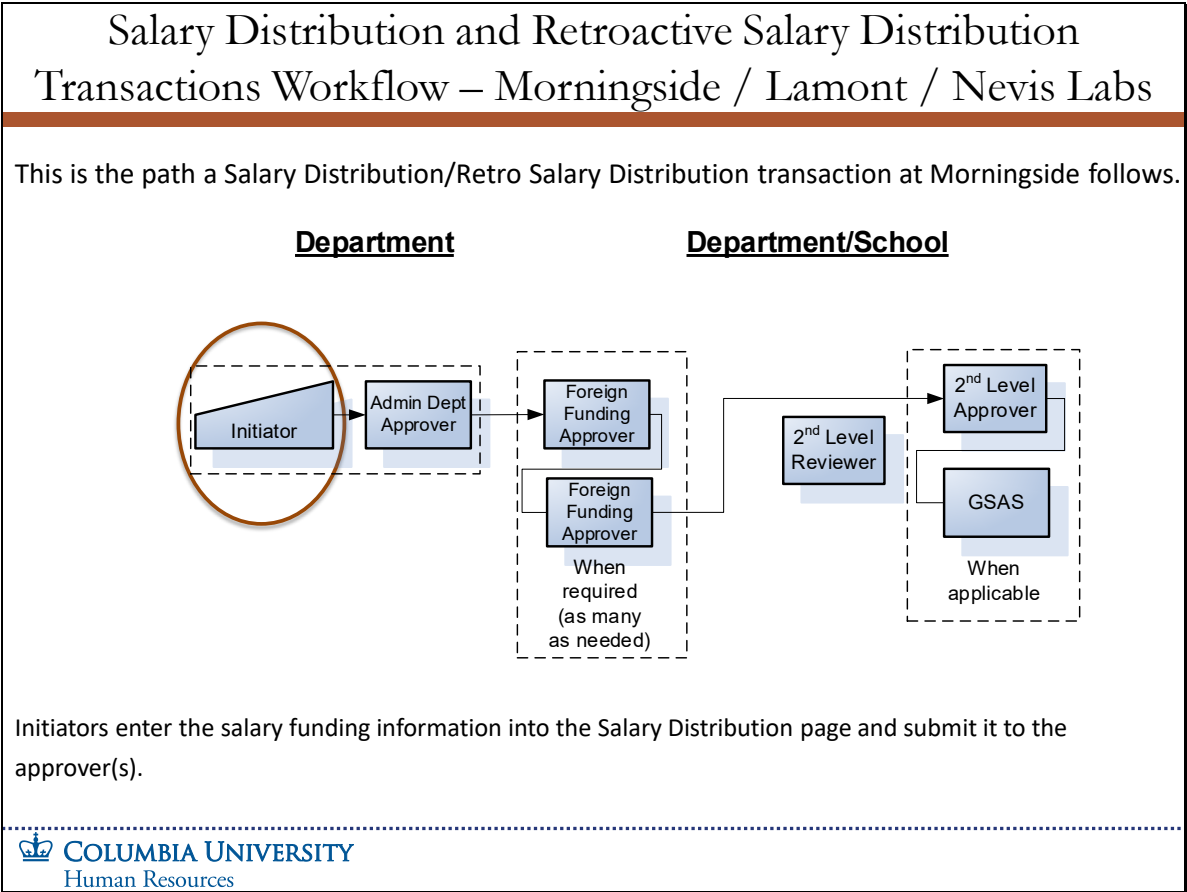
Once the last approver approves the transaction (clicks approve), the information is processed in PAC.



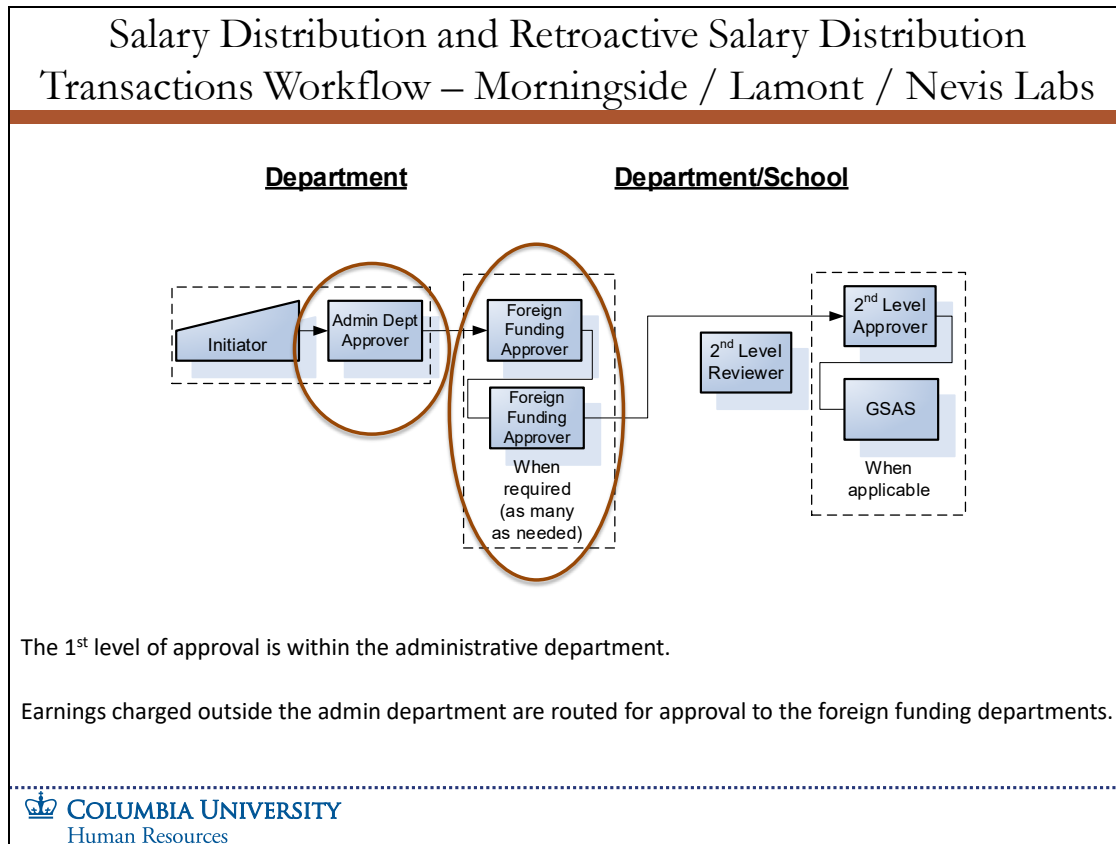
Only the Initiator or 1<sup>st</sup> level approver in the admin department can make changes to a transaction.

If any subsequent approver requires a change made, the transaction must be recycled to the admin department 1st level approver who can make any needed changes.

The admin department approver can recycle the transaction to the Initiator if desired. Once the page is updated, it is again submitted through the workflow for approval.

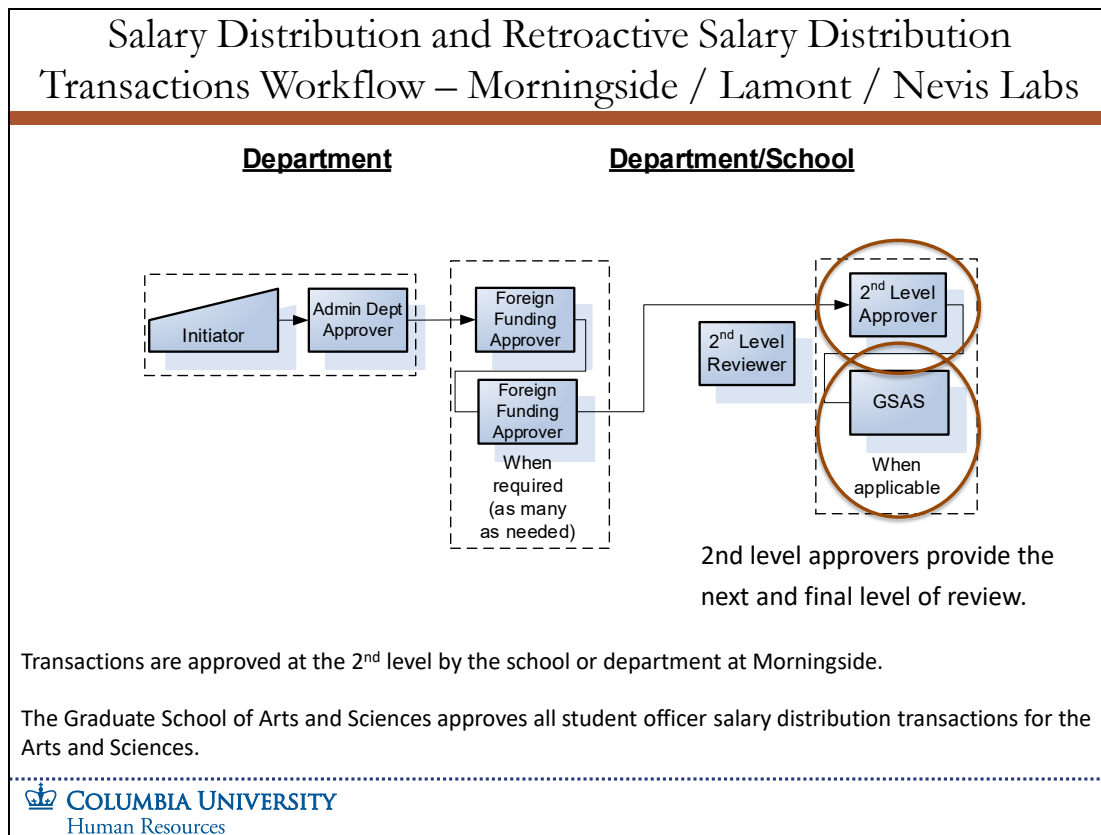


Slide 36 - Salary Distribution and Retroactive Salary Distribution Transactions Workflow – Morningside / Lamont / Nevis Labs



The 1<sup>st</sup> level of approval is within the administrative department.

Earnings charged outside the admin department are routed for approval to the foreign funding departments.

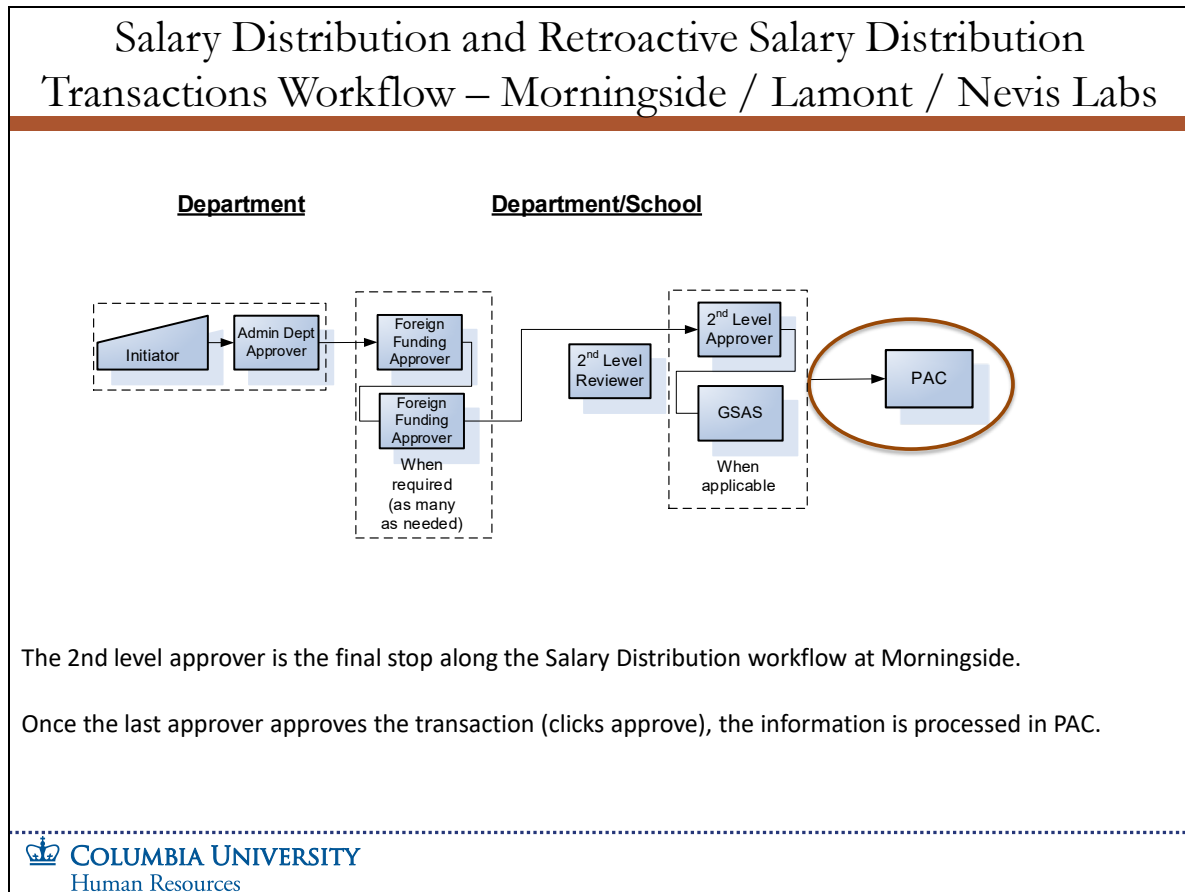


2nd level approvers provide the next and final level of review.

Transactions are approved at the 2<sup>nd</sup> level by the school or department at Morningside.

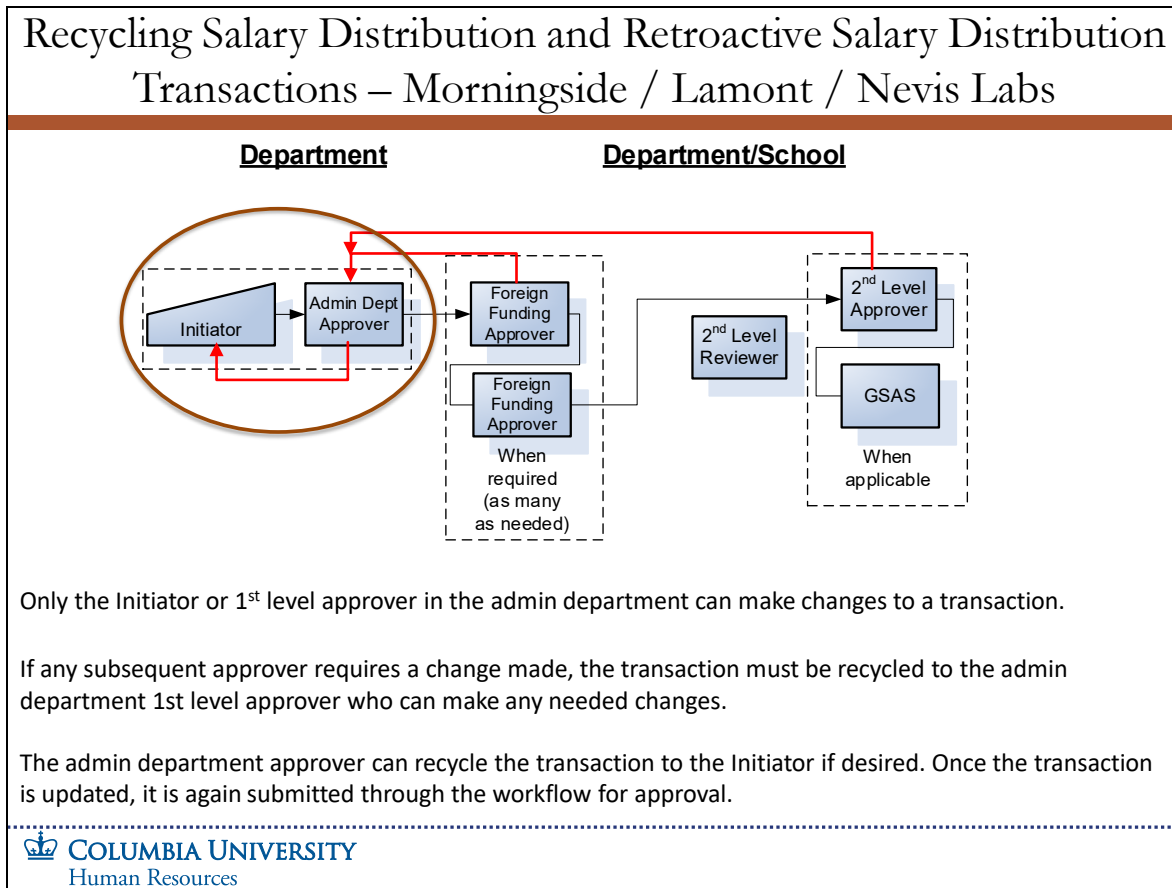
The Graduate School of Arts and Sciences approves all student officer salary distribution transactions for the Arts and Sciences.





The 2nd level approver is the final stop along the Salary Distribution workflow at Morningside.

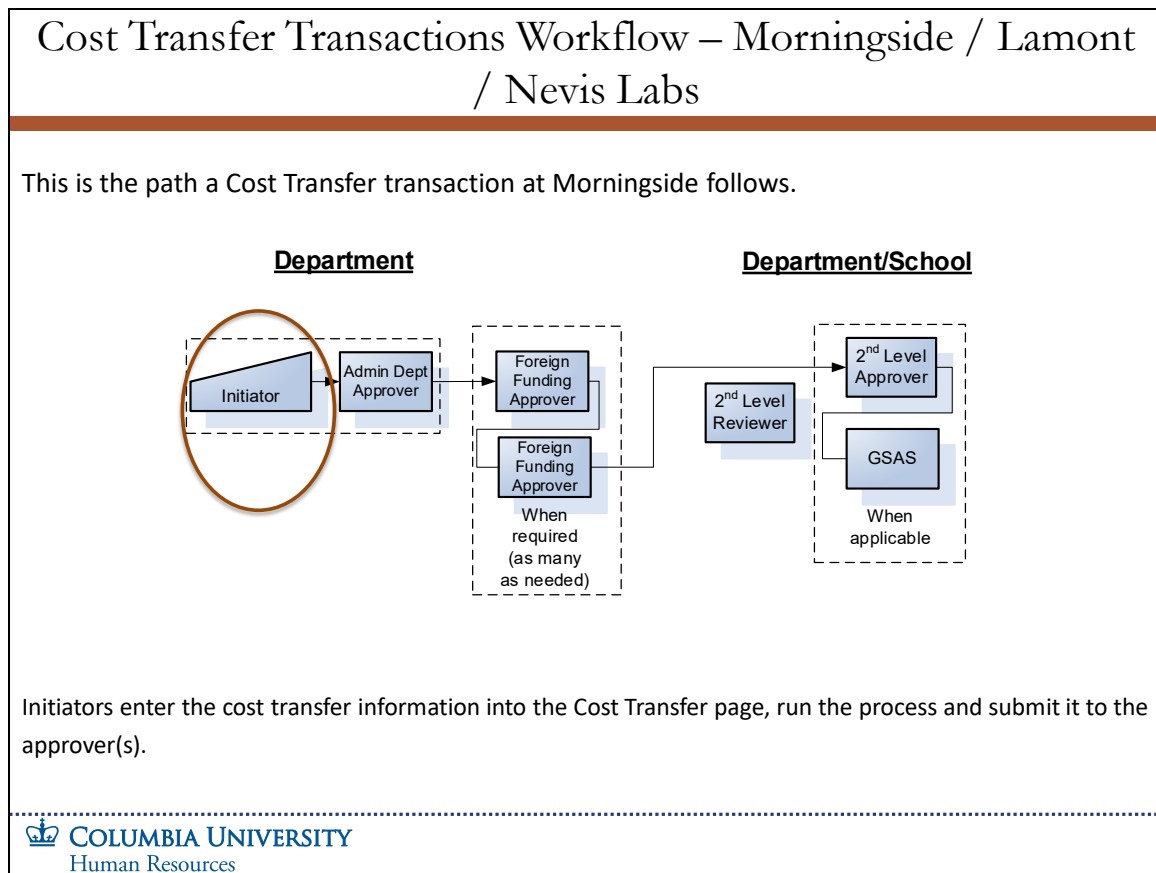
Once the last approver approves the transaction (clicks approve), the information is processed in PAC.



Only the Initiator or 1<sup>st</sup> level approver in the admin department can make changes to a transaction.

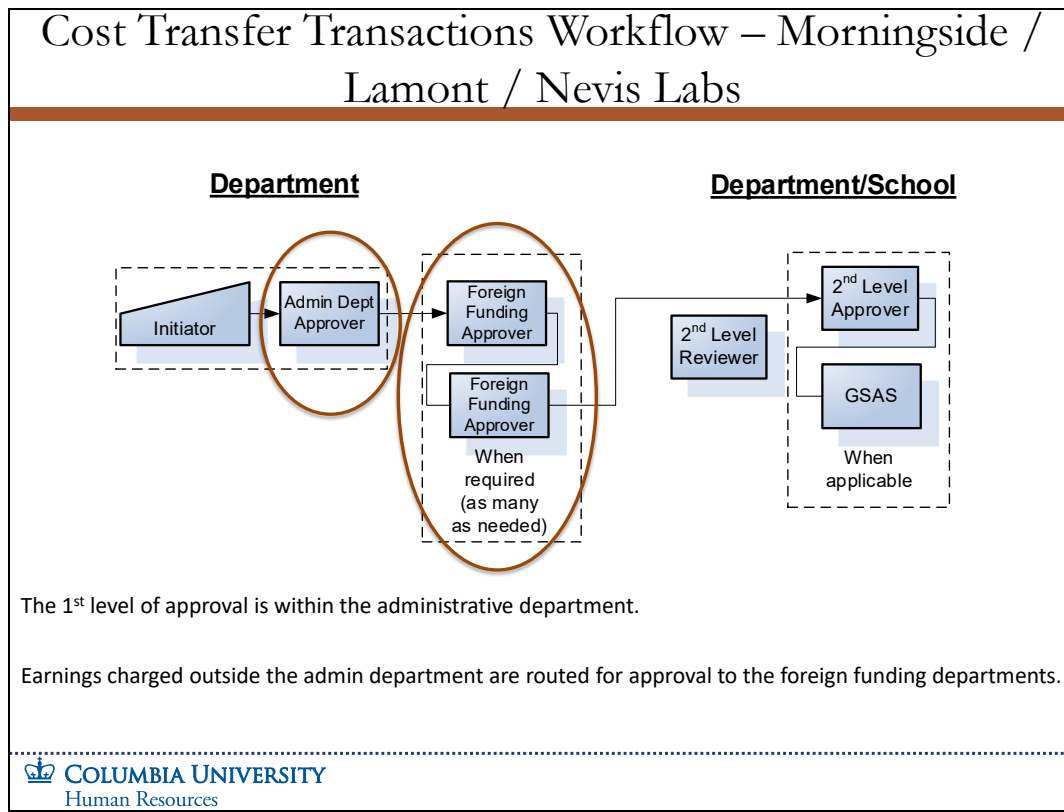
If any subsequent approver requires a change made, the transaction must be recycled to the admin department 1st level approver who can make any needed changes.

The admin department approver can recycle the transaction to the Initiator if desired. Once the transaction is updated, it is again submitted through the workflow for approval.



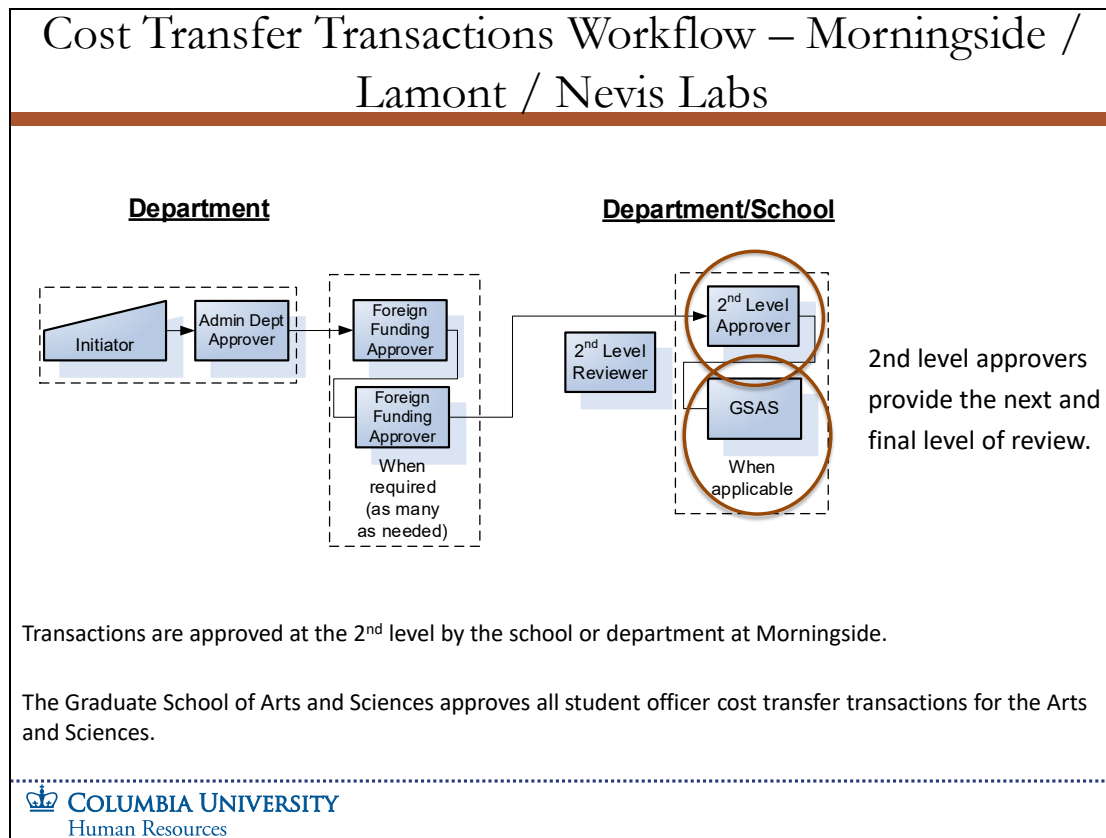
This is the path a Cost Transfer transaction at Morningside follows.

Initiators enter the cost transfer information into the Cost Transfer page, run the process and submit it to the approver(s).



The 1<sup>st</sup> level of approval is within the administrative department.

Earnings charged outside the admin department are routed for approval to the foreign funding departments.

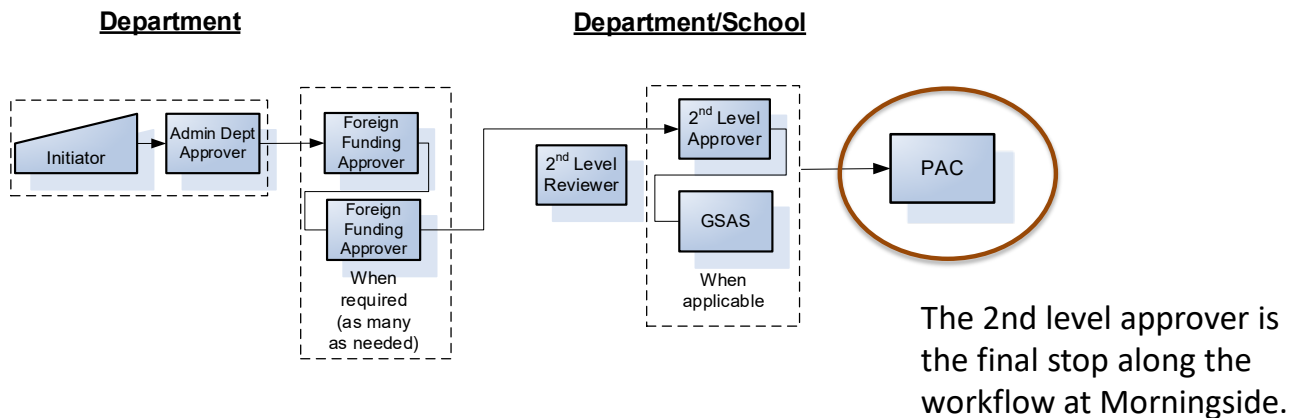


2nd level approvers provide the next and final level of review.

Transactions are approved at the 2<sup>nd</sup> level by the school or department at Morningside.

The Graduate School of Arts and Sciences approves all student officer cost transfer transactions for the Arts and Sciences.

## Cost Transfer Transactions Workflow – Morningside / Lamont / Nevis Labs



Once the last approver approves the transaction (clicks approve), the information is processed in PAC.

Cost transfer transactions can only be approved or denied. Because they are a process and not a data entry page, they cannot be recycled or modified once created. They can only be deleted, and a new transaction can be created.

The 2nd level approver is the final stop along the workflow at Morningside.

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## Workflow Roles and Access

### Workflow Roles

Your role and approval level in the workflow is defined by the following factors:

- **Your PAC role(s).** E.g., Manager Self-Service, TBH Initiator, or Accounting Approver. Your role(s) define the pages you can access.
- **Your Approval Authority.** E.g., Accounting approver level 1, TBH approver level 2. This authority defines the transactions you have permission to approve and at what point in the workflow.
- **Your Departmental Access.** The departments to which you have PAC access defines the employees for which you can initiate or approve transactions.
- **Required Training Completion.** Each role/approval authority requires completion of the applicable training courses and satisfactorily passing the associated knowledge assessment(s) before access is granted.

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# Workflow Roles and Approver/Security Access

## What is Security?

Security defines the pages and department(s) in which a user can transact. In the department tree, most users will have security access at a particular "node".

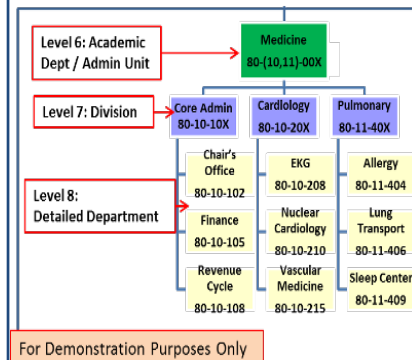
An approver can be responsible for many departments than the actual department worked in.

The department(s) that you can approve for is based on the security roles and departments granted.

The picture to the right depicts an example of this.

\*Department numbering for representation only.

- Approvers in a workflow view transactions for department(s) based on the security granted
- A person can "sit" in one level department and have security access granted at a different level.
  - For example - an employee's home or admin department can be a level 8 department (e.g. Allergy, 80-11-404), and the security access granted at the level 7 department (e.g. Pulmonary, 80-11-40X). \*Department numbers for demonstration only



Why can a person's security access be granted at a department level different from the admin department?

To allow transactions on the workflow to "stop" in the approvers worklist for all of the departments in their purview. In the above example, if the approver is responsible for all level 1 reviews for the Pulmonary Division, the security access must reflect that. If the security was granted to the admin department (e.g. Allergy), where the approver works, the approver, would only "see" transactions for the Allergy department and not the full division.

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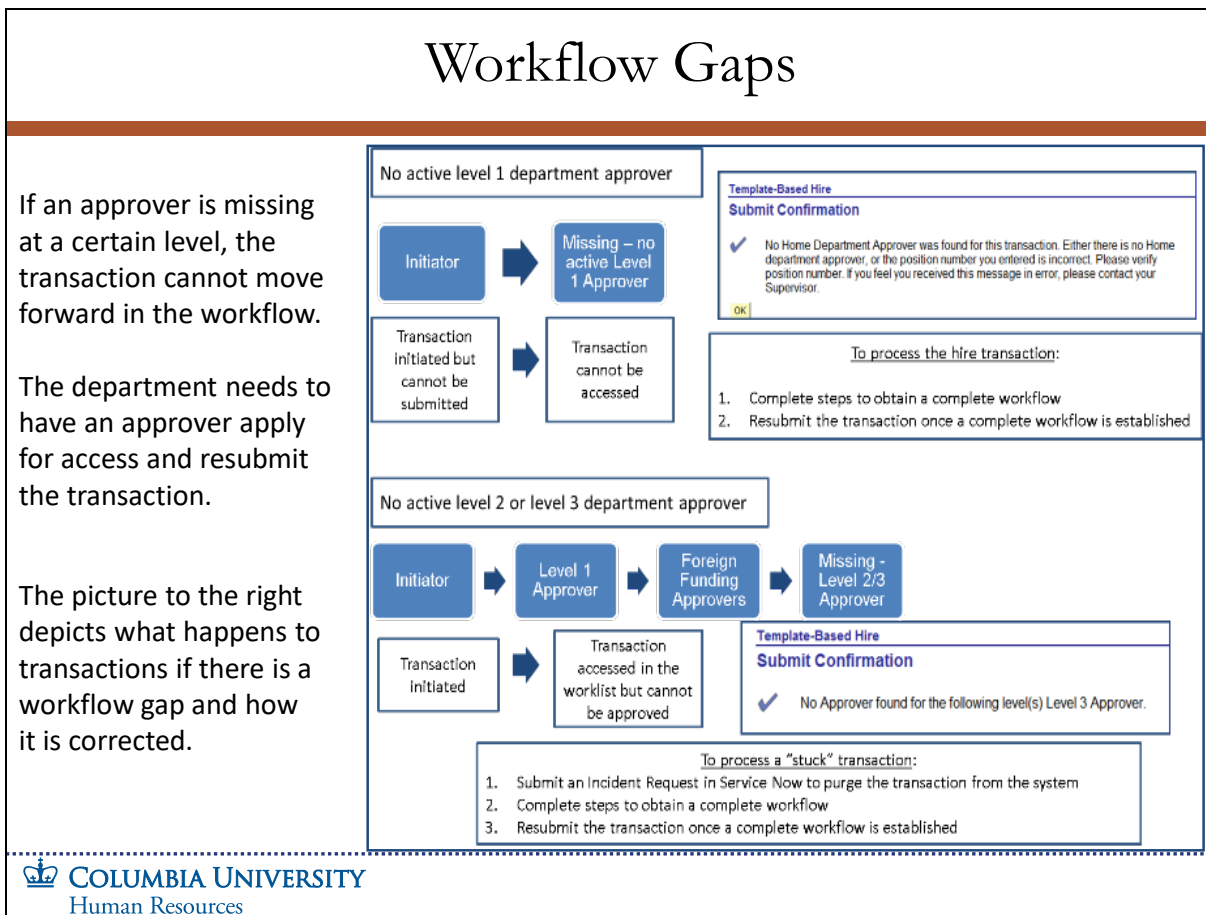
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The department(s) that you can approve for is based on the security roles and departments granted.

The slide depicts an example of this.

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If an approver is missing at a certain level, the transaction cannot move forward in the workflow.

The department needs to have an approver apply for access and resubmit the transaction.

The slide depicts what happens to transactions if there is a workflow gap and how it is corrected.

## Other Workflows

In addition to the transaction workflows for Template-Based Hire, Additional Compensation, Salary Distributions and Cost Transfers, there are other processes in PAC that utilize workflows.

- **eTermination** allows for the termination of employees via PAC entry and follows the TBH workflow.
- **eCompensation** is the module used for annual merit increases and the workflow for this is set up outside of the PAC Security Application and is provided on a department-by-department basis.
- **ePerformance** workflow is set via the employee and manager reporting structure.
- **PAC Timesheets and Absences.** For departments using this module, the workflow is set via the employee and manager reporting structure.
- **Paper Transactions.** For HR transactions such as ones using the Personnel Action Form (PAF), or time entry form, are submitted through the Paper Transaction module in PAC and follows the TBH workflow.

Reference the [PAC Manager Self-Service course](#) and ePerformance courses for additional training on transactor modules.



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## Obtaining Transacting PAC Role Access

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### Obtaining Initiator and Approver Access

- Departments determine who the initiators and approvers are, at which level approvers can approve, and for which type of transactions.
- An individual may have both initiator and approver roles.

### Request Access

To request access roles other than Employee Self-Service, complete the [PAC Security Application located in Service Now](#).

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 **COLUMBIA UNIVERSITY**  
Human Resources

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## Getting Help


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### Questions?

Please speak with your manager to confirm your needed PAC role(s) and the department access for those roles.

For HR inquiries including modifying your PAC access and training requirements, [contact the Human Resources Service Center](#).

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## Module Completion

### Congratulations

You have completed the “PAC Workflow, Roles and Security” module.

Click on the “X” in the upper right corner to close out of this entire window.

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