

ACT Enhancement -- Document Subgroup Options

This enhancement provides a means of further explaining the intent of an ACT document transaction. It also provides the platform for future reporting capability.

The Document Subgroup is driven by the ACT Document Reason and is required on a predetermined selection of ACT Document Reasons. For a listing of ACT Document Reasons requiring the Document Subgroup and current Doc Subgroup Options, click [here](#).

Below are written instructions on enhancement functionality. Also, an online video tutorial can be viewed, by clicking [here](#).

1. From the **ACT FIND** window; click on the **CREATE NEW DOCUMENT** button. Once the **ACT MAIN FORM** opens, enter the appropriate **DOCUMENT REASON** and **EFFECTIVE DATE**.

The **DOCUMENT SUBGROUP** button is located in the lower right hand corner of the **ACT MAIN FORM**.

Note: *If the Document Subgroup Option is required, based on the document reason selected, the DOCUMENT SUBGROUP button will be active.*

The screenshot shows the ACT Main Form with the following fields populated: Document Reason: CHANGE OF ASSIGNMENT, Effective Date: 06-SEP-2009, Requestor Name: HALEY. The Document Subgroup button is highlighted in red. A yellow callout box with red text reads: "Caution: It is essential that the DOCUMENT REASON field be populated prior to clicking on the DOCUMENT SUBGROUP button." The bottom navigation bar includes buttons for Person Data, Address, Assignment, Salary, Element Entries, Labor Sources, and Document Subgroup.

Note: *If the Document Subgroup Option is required and the DOCUMENT SUBGROUP OPTION form has not been completed before saving on the ACT MAIN FORM, this error will display.*

Click OK; *proceed to complete the DOCUMENT SUBGROUP OPTION form.*

The screenshot shows the ACT Main Form with the same populated fields as the previous image. An error dialog box is displayed in the center, with the message: "Error Please enter the Document Subgroup Option". The dialog box has an "OK" button. The Document Subgroup button in the bottom navigation bar is highlighted in red.

2. Click on the **DOCUMENT SUBGROUP** button; a form similar to the one below will display. Click on the **LOV** for a listing of available options for the selected document reason.

Document Subgroup Option

Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting.

Please choose the most appropriate option for this Document Reason, press "Save" to commit your choice and proceed to the Main form.

Doc Subgroup

Cancel Save

3. Select the description that best explains the nature of the transaction. Click on the **OK** button.

Document Subgroup LOV

Find %

Description

- Change of Assignment Category
- Faculty--Benefitted to Non-Benefitted
- Full Time to Part Time
- Part Time to Full Time

Find OK Cancel

4. Once the **DOC SUBGROUP** field is populated, click on the **SAVE** button to return to the **ACT MAIN FORM**.

Warning: If you change the **Doc SUBGROUP** field after the initial save in step 4, **you must re-save in order to commit your change.**

Document Subgroup Option

Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting.

Please choose the most appropriate option for this Document Reason, press "Save" to commit your choice and proceed to the Main form.

Doc Subgroup

Cancel Save

- Click on the **SAVE** button at the bottom of the **ACT MAIN FORM**.

Note: The **DOC SUBGROUP** field can be changed as long as the **DOCUMENT STATUS** is “**OPEN**” by repeating step 3 and 4.

- Proceed to complete the ACT document as necessary.

Note: If the **Document Subgroup Option** is not required, based on the document reason selected, the **DOCUMENT SUBGROUP** button will be inactive.

Proceed to **Save** and complete document as necessary.

Approval Notifications

ACT documents submitted into workflow **prior** to **September 10, 2009** the document subgroup button will display.

End User and Central Administration approvers will see the document subgroup button when accessing the document from the **UAB ACT FORM** link on the approval notification; however, the **DOCUMENT SUBGROUP OPTION** form will be disabled, as shown below.

ACT Main Form

Document Reason	PROMOTION SAME DEPAR	Document Number	419198
Effective Date	01-JUL-2009	Document Status	READY
Requestor Name	JOALICE	Workflow Type	CHANGE
<input type="checkbox"/> Attachments <input type="checkbox"/> Received		Submit Date	26-JUN-2009 11:42:33

Person Data

Name		Gender	Male
Identification Number		Ethnic Origin	White
SSN		Total Active Assignments	1
Service Date	01-JUL-1996	Total Projected Annual Salary	
Date of Birth		<input type="checkbox"/> Prior UAB Service	

Assignment Data

Assignment Number		Assignment Status	Active Assignment
Assignment Category	01 Regular FT	Organization	392200000 Microbiology
Job	0GG3.Prof Microbiology	Position	392200000.05201.031001
FTE	1	Primary	Y
Projected		Payroll	12/12 Monthly Faculty
Assignment Salary			

Person Address Assignment Salary Element Entries Labor Sources Doc Subgroup

Comments

Person Data Address Assignment Salary Element Entries Labor Sources Document Subgroup

Save Submit Cancel this document Log Reassign << < > >> *

Document Subgroup Option

Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting.

Please choose the most appropriate option for this Document Reason, press "Save" to commit your choice and proceed to the Main form.

Doc Subgroup

Cancel Save

ACT Main Form

Document Reason: **TRANSFER WITH PROMOTI** | Document Number: 419236
 Effective Date: 13-SEP-2009 | Document Status: READY
 Requestor Name: JOALICE | Workflow Type: CHANGE
 Attachments | Received | Submit Date: 11SEP-2009 21:26:17

Person Data

Name: | Gender: Female
 Identification Number: | Ethnic Origin: Black or African American
 SSN: | Total Active Assignments: 1
 Service Date: 11-SEP-1988 | Total Projected Annual Salary: |
 Date of Birth: | Prior UAB Service

Assignment Data

Assignment Number: 1013888 | Assignment Status: Active Assignment
 Assignment Category: 01 Regular FT | Organization: 110400000 University Police
 Job: AC102N1.Admin Support Sp | Position: 110400000.20601.070121
 FTE: 1 | Primary: Y
 Projected: | Payroll: Biweekly
 Assignment Salary: |

Person | Address | Assignment | Salary | Element Entries | Labor Sources | Doc Subgroup

Comments: |

Person Data | Address | Assignment | Salary | Element Entries | Labor Sources | Document Subgroup

Save | Submit | Cancel this document | Log | Reassign | << < > >> *

ACT documents submitted into workflow ***on or after* September 10, 2009** the document subgroup button will display.

When accessing the document from the **UAB ACT FORM** link in the approval notification, if the **DOCUMENT SUBGROUP** form was required, a checkmark ***will*** appear in the **DOC SUBGROUP** checkbox.

The ***End User Approval path*** can view the selected description by clicking on the **DOC SUBGROUP** button. If the description selected is not appropriate, the document must be returned to the requestor and corrected.

Document Subgroup Option

Document Subgroup Options are driven by the ACT document reason and should be used to provide additional clarification of the intended action. The Subgroup options have been developed to assist with reporting.

Please choose the most appropriate option for this Document Reason, press "Save" to commit your choice and proceed to the Main form.

Doc Subgroup: **Hire into a Recruited Position**

Cancel | Save

NOTE: There is no change to the Central Administration Approval Path.

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