Getting Your



(Workflow information Tracking System)

On

Work

A Step-by-Step Guide

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About WiTS

What is WiTS?

WiTS is a workflow management system that provides corporate consistency through business process management and automated workflows. This automated workflow system enables OHR to monitor and track the status of a vast array of actions, correspondence and approvals. It enables OHR to track the location, responsible person/body, action status, action effective/due date, etc., of personnel actions (i.e., awards, promotions, recruitments, benefits actions, etc.). WiTS can communicate the status of these actions to administrative staff and management officials through its monitoring views and auto-generated emails. The system also allows for the measurement of the performance of HR staff (trend analysis) and identification of staff skill, competency and improvement areas, provides a variety of reports (i.e. workload, metric), and facilitates customer service through improved communication and timeliness in completing actions.

WiTS is secure and web-enabled, and with appropriate remote privileges, can be accessed over the Internet from anywhere.

What Does WiTS Do For Me?

- Provides action tracking which can reduce the number of inquiries from customers regarding the status of actions
- Facilitates and expedites the transmission of approvals and provide communication regarding the status of actions
- Provides real-time monitoring of actions
- Sends notifications when a workitem has been received or completed
- Allows you to send and receive comments and/or attachments with the action
- Sends reminders
- Provides workload analysis
- Provides reporting tools
- Allows Single Sign On through the NIH OHR Website
- Prioritizes actions
- Automatically routes actions to designated back-up when primary is out of the office

Working with WITS

Accessing WiTS for the First Time

Go to the WiTS website at: <u>http://wits.od.nih.gov</u>. You will see the following screen:

	UST		
User Name: IubelsI Password: Log in	Change Password	OR	Insert your PIV card into your smart card reader before attempting to login. For assistance, read the instructions for using smart cards and certificates with NIH Login (PDF, 21 pages, 726 KB). Log in

- 1) Using the first option, *Type* in your **Network User ID** (usually the first few of the last name followed by first initial) Example: smithj for Joe Smith.
- 2) **Type** in your network password. **Click** on the **Log** in icon. **OR**
- 1) Using the second option, *Insert* your **PIV Card**.
- 2) *Click* on the "Log in" Log in icon.

Working on Actions

Your Work Area Page

Upon successful login, you will see your Work Area Page. Your work area page will be specific to your role and will display the Bizcoves that you will need.

WITS	🙎 Lubei 🗇 07/16/13 🚸 Management 💐 Preferences 🙄 Helps 🗐 Log Out
Workinst BizCove	Cassification Unit Work Area •
U HR Systems Support Self Help	/ D0
BizCove For gen	Please visit <u>HR Systems Support Self Holp</u> to find answers to many common questions. ral information about WiTS, including <u>User Guides</u> and <u>Online Tutorials</u> , please visit the <u>WITS Page</u> on the OHR website.
WiTS Reports	- D0
Name	Description
Access WITS Reports	Page where you can select a report, define your parameters and generate your report. Also includes links to Quick Reference Guides about each report.
WITS Action Initiation	(Do
▲ Name	Description
Classification	Use this workflow for dissofication actions, which define and establish the occupational series, title, grade of Federal positions.
Request for HR Systems Access (and User Profile Changes/Deletions)	WITS Super Users, Branch Chiefs, Deputy Division Directors and Division Directors can use this workflow to request new, modified or deleted access to HRSS supported systems (Capital HR, eCIPF, WITS, HRS Careers, Classification, etc.).
E Request for HR Systems Support	Use this workflow to submit support requests for HR systems such as HHS Careers, Classification, Portal, VIITS, Capital HR (CHR), etc. Initiate a separate request per system.
	Start
Classification Unit Worklist	04
▲ WiTS # Action Type HRS HRA	CU Classifier Date Reed IC Org Initials Filame LHame Pos. Title PPlan Series Grade Prop. Eff. Date
	No records to diplay on this page
Quick Search:	7 Open Selected Acton, Provided to Another User Monitor Solected Process Export List to Excel
CACtive Classification Transactions	(vo

WiTS BizCoves are blocks of information, work activities, and functionality delegated to participants according to their responsibilities within the organization. The blocks of information are presented to provide at-a-glance access to pending work and reports. Depending on your role, the BizCoves are displayed in your Work Area will change.

Some of the most commonly used BizCoves are divided into the following areas:

- HR Systems Support Self Help access to WiTS user guides and tutorials
- WiTS Reports access to individual reports.
- WiTS Action Initiation work processes that you can initiate
- Worklist immediate access to your workitems
- Active WiTS Transactions*— access to all active workitems in your team / organization
- HR Systems Support (Help Desk) Worklist* lists HR Systems Support work items requiring your attention
- My Active HR Systems Support (Help Desk) Transactions* lists all of your open HR Systems Support tickets

* Note: These BizCoves are not shown in the screenshot above.

To view Archived (completed) WiTS actions, *select* "Archives Page" from the drop down menu at the top right of the page:



In addition to organizing work, BizCoves provide a series of buttons at the bottom of each block to help you perform necessary actions:

- initiates the selected process/action
Open Selected Action opens the selected action
Forward to Another User enables you to manually re-route the action to another WiTS user
Monitor Selected Process enables you to determine where an active action is within a process or view the completed steps of an archived action
Export List to Excel exports the data into an Excel spreadsheet
View Action Detail allows you to see narrative details about the action; also gives the user access to functions such as View, Complete, Monitor, Forward, Excel, Print, Refresh
Advanced Search allows you to search the BizCove for actions based on certain criteria

Initiating Actions in WiTS

From the **WiTS Action Initiation** BizCove on your work area page, you can initiate a variety of actions. There are two ways to initiate an action within the **WiTS Action Initiation** BizCove - you can either:

1) Click on the name of the process to be started OR Click on the checkbox next to the process

name and then *click* "Start" Start button.

A WITS Action Initiation	
▲ Name	Description
Appointment	Use this workflow for appointing (hiring) new employees and moving existing employees into new positions as a result of recruitment/competition.
Award	Use this workflow to process award actions including Special Act/Service, QS1, Time off as an Incentive, etc.
Career Change	Use this workflow to move employees into and out of positions (Promotions, Reassignments, Changes to Lower Grade, etc.) when the change is NOT made as a result of recruitment.
Change in Work Schedule / Hours	Use this workflow for actions that change either the schedule or the hours that employees are obligated to work. Note: This workflow is NOT used for tour changes (when the time of day that the employee is reporting to/departing from work is changing).
Classification	Use this workflow for classification actions, which define and establish the occupational series, title, grade of Federal positions.
Leave Without Pay	Use this workflow to place employees in Leave Without Pay status.
Recruitment	Use this workflow to initiate recruitment actions.
Request for HR Systems Access (and User Profile Changes/Deletions	WITS Super Users, Branch Chiefs, Deputy Division Directors and Division Directors can use this workflow to request new, modified or deleted access to HRSS supported systems (Capital HR, eOPF, WITS, HHS Careers, Classification, etc.).
Request for HR Systems Support	Use this workflow to submit support requests for HR systems such as HHS Careers, Classification, Portal, WiTS, Capital HR (CHR), etc. Initiate a separate request per system.
Request for Job Code / Position Number	Use this workflow for submitting requests for the creation, modification, activation or deactivation of Job Codes and/or Position Numbers.
Return to Duty	Use this workflow to process actions that return employees to duty (placing them back in pay status after LWOP).
Separation	Use this workflow to process actions to separate employees from employment with the NIH.
Special Pay Process	Use this workflow for the following pay actions: Recruitment Incentives, Relocation Bonuses, Retention Allowances, SLRP, Physicians Comparability Allowances, On Call Pay, and Exceptional/Quadrennial Pay Increases that do not require NIH Committee review.
	(d) () (b) (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c

After you have initiated a process, a blank form will open. The look of the form will vary depending upon the process initiated. For example, if you choose HR Systems Support (help desk), an HR Systems Support ticket will open:

<u>#iT\$</u>	HR System	s Support Request		
Ticket Information SECTION 1 - Ticket Information				* Required Fields
Ticket # Status" Full Name of User" (d82 Januar) User Phones (ino dashes) Total Number of Users Alfected System"	Pending	Date Initiated Priority Code" User Email" Organization" IC" Issue Category"	05/24/2013 12:24 PM Moderate •	•
Problem Description	Note: Do NOT enter SSN information in this a	rea or attach any documents containing such infor	mation to this request.	

Which has a different look than the HR action form:

WITS		Award						Award 🖉			
Transaction Employee Award Information Information	Final Processing/ Authorization										
WITS #:	25614	Date Entered:	07/18/2013 10:16 AM	* Required Field							
Action Type:	Award	Date Recv'd in HR*1 (mm/dd/yyyy)	07/18/2013	100							
AO's First Name":		AD's Last Name*; (MD Lookar)									
AO's Email Address*:		Global Recruitment?*:	-								
Administrative Code*:		Institute/Center*:									
Organization Initials:		Proposed Effective Date*: (mm/dd/yyyy)		123							
C5D Branch Chief*:		CSD Team Leader*:									
CSD HR Specialiet*1		CSD HR Accistant*									
CSD SPA*1	•										
Is the package complete?*:		List of Missing Docs/Info (Limit 500 charac	iters)								
Date Missing Docs Email Sent:	2		14								
Date Complete Package Received:		List of Mosing Document Characters	s/Information. Limit 500 *								
Priority*:	High -	Action Status Code*:	•								
Action Status*:	-	Action Status Description*:									
Comments (Limit 5000 characters)											

Complete the data fields on the form as appropriate for the type of action/help request that has been initiated. All mandatory fields are indicated by asterisks.

After you have completed the appropriate fields on the form, you have several options. You can:

- Save the action as partially completed,
- Close the action without saving,
- Add a comment,
- Add an attachment, or
- Move the action to the next activity/participant in the process.

Note: If you miss a mandatory field, the system will prompt you to complete it before the action can be moved forward.

Saving a Partially Completed Action

If you save a partially completed an action WiTS keeps the information you have already entered, but does not send it to the next activity. The work item appears again in your Work Area as partially completed.

- 1) *Enter* the data on the form.
- 2) *Click* the "Save" icon on the menu bar at the top of the screen. When you click the save icon, the workitem will be saved back into your active worklist to allow you to work on it at a later time.

Opening a Partially Completed Action

If you have saved a partially completed action, and at a later time you need to complete the action, go to your **Worklist** BizCove.

1) Click on the WiTS Transaction Number

OR

2) Click on the checkbox beside the WiTS Transaction, and then Click on the "Open Selected

Action" Open Selected Action... button.

🔣 Work	list													
▲ Wi	TS # Act	ion Type	HRS	HRA	CU Classifier	Date Recd	IC	Org Initials	FName	LName	Pos. Title	PPlan	Series	Grade
	23718 UAT - Benefits Pro	tess	Verge, Terrye	Verge, Terrye			Test	Play/Testing Branch	Dan	Snyder	Redskins Owner	GS	1111	15
	27693 UAT - Change in W	ork Schedule / Hours	Furber, Katie	Furber, Katie		03/19/13 10:51:06 AM	Test	Play/Testing Branch	Catherine	Furber	Industrial Hygienist	GS	0690	13
	27734 UAT - Recruitment	Request				03/19/13 02:40:55 PM								
	27736 UAT - Recruitment		Lubel, Samantha	Lubel, Samantha		03/19/13 02:41:20 PM	Test	Play/Testing Branch			Dog Walker	GS	0665	10
	27764 UAT - Initiate Appo	intment Process	Lubel, Samantha	Lubel, Samantha		03/20/13 12:41:59 PM	Test	Play/Testing Branch						
1				4	1	≪ ∢ 1 2 ▶	*							
		Quick Search:	4	Open Selected	Action	Forward to Another Use	er	Monitor Sele	cted Process		Export List to Exce			

After you have opened the partially completed action, you will see the saved form for that action. Complete the data fields on the form as appropriate. You can then send the action to the next activity (step in the process and/or activity participant).

Adding a Comment

If you want to add a comment to an action, from the form toolbar:

1) **Click** the "**Comment**" sicon.

Routing Send to HRA	🔻 😿 Complete 🔚 Save 🖑 Comment (🚍 Print 样 Exit without saving	
W I I S workflow information tracking system	Appointment	Kational Institutes of Concern Management

- 2) Type your comment in the pop-up box that appears.
- 3) **Click** "**Add**" when finished. Your comments will appear along with any other comments that have been previously entered.

Comment - Windows Internet Explorer		X
There is no comment.	New Comment	
	write your comment here	*
		-
	Send to Parent Process	
	Add	
		se

Note: Be sure to check "Send to Parent Process" and "Send to Subprocess" if you want the comment seen throughout the entire action.

- 4) Your comment will appear to the left of the screen.
- 5) When an action contains a comment, the icon will change



To edit a comment:

Select the comment and *click* the "Modify" icon:

To delete the comment:

Select the comment and *click* the "Delete" **S**icon:

Adding an Attachment

To add an attachment to an action:

- 1) **Click** the "**Attach File**" Attach File button. An Attach file dialog box will open.
- 2) **Click** the "**Browse**" Browse... button and locate the file you wish to attach. You can attach any type of file.
- 3) *Click* "Open." Your file will appear in a panel at the bottom of the screen.

l i T S	Appointment							
ransaction Appointment Approvals Information Information	Pay Orientation Information Information	Final Processing/ Authorization						
WITS #:	27764	Date Entered:	03/20/2013 12:42 PM	* Required Fields				
Action Type:	Appointment	Date Recvid in HR*:	03/20/2013					
AO's First Name*:	Samantha	(mm/dd/yyyy) AO's Last Name*:	Lubel					
AO's Email Address*:	lubelsl@mail.nih.gov	(NED Janiva) Global Recruitment?*:	No -					
Administrative Code*:	TEST	Institute/Center*:	Test					
Organization Initials:	Play/Testing Branch	Proposed Effective Date*: (mm/dd/yyyy)	04/10/2013	8				
CSD Branch Chief":	Kerr, Ken 👻	CSD Team Leader*:	Lubel, Samantha •					
CSD HR Specialist*:	Lubel, Samantha •	CSD HR Assistant*:	Lubel Samantha +					
CSD SPA*:	Shahparast Afshar, Negy 👻							
Is the package complete?*:	-	List of Missing Docs/Info (Limit 500 charact	ers)					
Date Missing Docs Email Sent:			*					
Date Complete Package Received:	100		.*					
Priority*:	High +	Action Status Code*:	Red +					
Action Status*:	Active in HR 🔹	Action Status Description*:	Active	•				

Exiting Without Saving

If you do not want to save the information you have entered in the form, *click* the "Exit without Saving" Exit without saving icon. The work item will remain in your Work Area, but any information you entered will not be saved.

Moving an Action to the Next Step

To send the action to the next activity in the process,

- 1) **Select** the appropriate response from the routing drop down menu at the top left of the screen. The response menu contains a list of choices that will either direct the action to the next step in the process or complete a specific task (e.g., send an automated email).
- After you have chosen the appropriate response, *click* the "Complete" ^{Complete} icon to the right of the response drop-down menu. This will send the work item will be sent to the next step (activity/participant) within the workflow.

Routing Send Pokg Reod Email	💑 Complete 📊 Save 🎝 Co	mment" 🚔 Print 💢 Exit without saving	
Send Policy Incomplete Email Send Sec Inv Email Send to DEU (Sel Apprvl) Send to HRA	11	Appointment	National Institution of Health
Send to SPA Cancel Action			

Note: If the next step in the process involves another participant, the workitem will no longer appear in your worklist. However, you can monitor the status of the action from the **Active WiTS Transactions** BizCove.

Accessing Actions Sent to You

All work that is sent to you will appear in your **Worklist** BizCove.

1) Access your Worklist BizCove Work Area page and Click on the WiTS Transaction Number

OR

2) Click on the "check box beside the WiTS Transaction, and then Click on the "Open Selected

🔣 Wa	rklist													
-	WiTS #	Action Type	HRS	HRA	CU Classifier	Date Recd	IC	Org Initials	FName	LName	Pos. Title	PPlan	Series	Grad
	23718 UA	T - Benefits Process	Verge, Terrye	Verge, Terrye			Test	Play/Testing Branch	Dan	Snyder	Redskins Owner	GS	1111	15
	27693 UA	T - Change in Work Schedule / Hours	Furber, Katie	Furber, Katie		03/19/13 10:51:06 AM	Test	Play/Testing Branch	Catherine	Furber	Industrial Hygienist	GS	0690	13
	27734 UA	T - Recruitment Request				03/19/13 02:40:55 PM								
	27736 UA	T - Recruitment	Lubel, Samantha	Lubel, Samantha		03/19/13 02:41:20 PM	Test	Play/Testing Branch			Dog Walker	GS	0665	10
	27764 UA	T - Initiate Appointment Process	Lubel, Samantha	Lubel, Samantha		03/20/13 12:41:59 PM	Test	Play/Testing Branch						

The form for the selected action will open. After completing the required information on the form, you may have several options to move/save the action. See "Initiating Actions in WiTS" above for options for moving or saving an action.

Monitoring Actions in WiTS

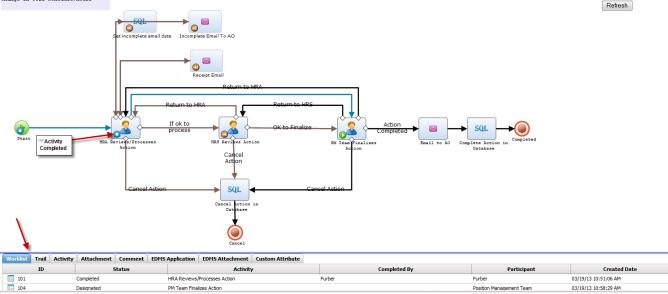
WiTS allows you to monitor an action and view detailed information about it. Perhaps you have initiated an action and need to see who currently has it or what step the action is currently at within the process. You may also want to view the details of an action that someone else has initiated, or to see whether or not there are attachments or comments associated with it, or when an action will arrive at in your worklist.

To monitor an action:

- 1) Select a workitem from a Worklist BizCove by checking the check box next to it.
- 2) Click 'Monitor Selected Process"

	▲ WiTS #	Action Type	HRS	HRA	CU Classifier	Date Recd	IC	Org Initials	FName	LName	Pos. Title	PPlan
	23718	UAT - Benefits Process	Verge, Terrye	Verge, Terrye			Test	Play/Testing Branch	Dan	Snyder	Redskins Owner	GS
	27693	UAT - Change in Work Schedule / Hours	Furber, Katie	Furber, Katie		03/19/13 10:51:06 AM	Test	Play/Testing Branch	Catherine	Furber	Industrial Hygienist	GS
1	27734	UAT - Recruitment Request				03/19/13 02:40:55 PM						
	27736	UAT - Recruitment	Lubel, Samantha	Lubel, Samantha		03/19/13 02:41:20 PM	Test	Play/Testing Branch			Dog Walker	GS
/	27764	UAT - Initiate Appointment Process	Lubel, Samantha	Lubel, Samantha		03/20/13 12:41:59 PM	Test	Play/Testing Branch	1	1		
							₩		/			

The Monitor window will open. You can then view the routing map of the process and obtain information about the action by clicking on the tabs at the bottom of the routing map. Change in Work Schedule/Hours



The thick blue lines indicate the route the action has taken. In addition, you will see icons in the lower left hand corner of the activity box which also provide an explanation of where the action has been and where it is (if the process has not been completed).

Activity Status Icon Descriptions



- Current Activity

To view specific information about the action (e.g., trail, attachments, comments, etc.), you can click on the tabs below the routing map.

The tabs in the Monitor window include the following:

Tab	Description
Worklist	Lists the workitems for the process instance. The process instance may have more than one workitem per activity if there is more than one participant for that activity.
Trail	Shows the event log for items associated with the process instance, such as the instance itself, activities

	and workitems.
Activity	Lists the activities and gives details such as their status.
Attachment	Shows any files that have been attached to the instance by a user in his/her workitem.
Comment	Lists any comments that have been added to the instance by a user in his/her workitem.
Custom Attribute	Not used at this time

Completing an Action Assigned to Someone Else

Occasionally, it may be necessary for you to access another user's action and complete it.

To complete an action assigned to someone else, go to the Active WiTS Transactions BizCove,

- 1) Check the box next to the action you wish to complete.
- 2) **Click** on the "**Detail**" Detail... button.

	WITS #	Process Name	Priority	HRS	HRA	Date Recd	Action Type	IC	Org Initials	Filame	LName	Pos. Title	PPlan	Series	Grade	Prop. Eff. Date
1	28571 1	JAT - Appointment				07/09/13 08:54:01 AM	Appointment									
	28559	JAT - Appointment				07/05/13 11:50:08 AM	Appointment									
]	28537 (JAT Appointment	High	Lubel, Samantha	Lubel, Samantha	07/01/13 08:53:24 AM	Appointment	Test	Play/Testing Branch	Michael	U andrea	Biologist	GS	0101	09	07/29/13
	28531 1	JAT - Classification	High	Lubel, Samantha		06/28/13 09:12:12 AM	Classification	Test	Play/Testing Branch			Testing Workflow	GS	0201	01, 04	06/28/13
1	20403 (JAT - LWOP Process				06/20/13 04:02:00 PM	Leave Without Pay (LWOP)									
	28455	JAT - Appointment	High	Kerr, Ken	Kerr, Ken	06/13/13 12:38:21 PM	Appointment	Test	Play/Testing Branch	Kenneth	Kerr					06/20/13
	28442 1	IAT - Classification				06/11/13 09:47:41 AM	Classification	1								
							1 2 3 4 1	5 11.1								

The Process Instances Details Window will open.

- Check the box next to the activity you wish to complete. (Note: You may only complete an action that has not already been completed. If multiple activities are listed, select the last activity listed that is noted as "created".)
- 4) **Click** on the "**Complete**" ^{Complete}... icon.
- 5) This will open the form for the action you have selected. Complete and move the action forward as necessary.

lam	1e			JAT - Classific	ation		Process II)	28531		
Stat	tus			Running			Custom II)			
Urge	ency			Normal			Initiator		DAndrea		
Che	ck Pa	sswo	ord	Jnchecked			Initiated D	Date	06/28/13 09:12:	12 AM	
Dea	dline						Descriptio	n	Process for class define and estab series, title, grad	lish the occup	ational
Nork	dist	Act	ivity A	ttachment	Comment						
Vork		Act	ivity A Status		Comment	View		ete 🐕 Forv Participant	ward 3 M		🕅 🖨 😋
Vork		D		Ac	ctivity	View	. 🚰 Comple				
		D 101	Status	HRS Revie	ctivity	Comp	. 🚰 Comple	Participant	Created Date		
		D 101 103	Status Completed	HRS Revie	ews Action	Compl DAndrea	. 🚰 Comple	Participant DAndrea Classification	Created Date 06/28/13 09:12:12 AM 06/28/13		
		D 101 103 105	Status Completed	HRS Revie	ews Action	E View Comp DAndrea DAndrea	. 🚰 Comple	Participant DAndrea Classification Unit	Created Date 06/28/13 09:12:12 AM 06/28/13 09:14:08 AM 06/28/13		
		D 101 103 105 107	Status Completed Completed Completed	HRS Revie CU Classifi HRS Revie CU Classifi	extivity ews Action les Position ews Action les Position	DAndrea DAndrea DAndrea	. 🚰 Comple	Participant DAndrea Classification Unit Lubel Classification	Created Date 06/28/13 09:12:12 AM 06/28/13 09:14:08 AM 06/28/13 09:14:45 AM 06/28/13		

Forwarding an Action to another WiTS User

Transactions within WiTS may be forwarded as needed to other WiTS users. **Note:** It is generally not recommended to forward your actions to another user unless you believe the action was erroneously sent to you and you need to forward the action to the appropriate user.

To forward an action:

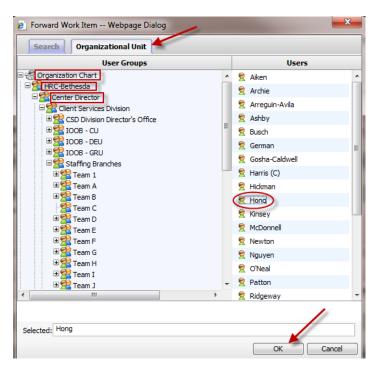
1) Go to either the **Active WiTS Transactions** BizCove **OR** the **Worklist** BizCove, *check* the box of the action you wish to forward.

Note: This feature is only available for actions that have not yet closed.

2) **Click** on the "**Forward to Another User...**" Forward to Another User... button. This will open a pop-up window with an organizational structure.

23718 UAT - Benefits Process Verge, Terrye Verge, Terrye Test Play/Testing Branch Dan Smote Reddring Owner GS 1111 15 27693 UAT - Change in Work Schedule / Hours Puber, Kalle 03/19/13 10:51:06 AM Test Play/Testing Branch Catherine Puber Industrial Hygienist GS 0650 13 02/10/1 27734 UAT - Recruitment Request 03/19/13 02:41:55 FM 03/19/13 02:41:20 FM Test Play/Testing Branch Dog Walker GS 0655 10 04/10/1	Folder													
27693 UAT - Change In Work Schedule / Hours Furber, Kate 03/19/13 10:51:06 AM Test Play/Testing Branch Catherine Furber 63 0690 13 02/10/1 27734 UAT - Biorutenet Request 03/19/13 02:40:55:06 AM Test Play/Testing Branch Catherine Furber 63 0690 13 02/10/1 27736 UAT - Recruitment Lubel, Samantha 03/19/13 02:41:20 PM Test Play/Testing Branch Cog Walker 65 0665 10 04/10/1	Action Type	HRS	HRA	CU Classifier	Date Recd	IC	Org Initials	Filame	LName	Pos. Title	PPlan	Series	Grade	Prop. Eff. Date
27734 UAT - Reprutment Request 01/15/13.02-90:55 PM 27736 UAT - Reprutment Lubel, Samantha 02/15/13.02-90:25 PM 27736 UAT - Reprutment Lubel, Samantha 02/15/13.02-90:25 PM	UAT - Benefits Process	Verge, Terrye	Verge, Terrye			Test	Play/Testing Branch	Dan	Snyder	Redskins Owner	GS	1111	15	
- 27736 WAT - Reprutment Lubel, Samantha Lubel, Samantha 03/19/13 02:41:20 PM Test Play/Testing Branch Dog Walker GS 0665 10 04/10/1	UAT - Change in Work Schedule / Hours	Furber, Kate	Furber, Katie		03/19/13 10:51:06 AM	Test	Play/Testing Branch	Catherine	Furber	Industrial Hygienist	GS	0690	13	02/10/13
27736 UAT -Recruitment Lubel, Samantha Lubel, Samantha 03/15/13/02-14:20 PM Test Play/Testing Branch Dog Walker GS 0665 10 04/10/1	UAT - Redruitment Request				03/19/13 02:40:55 PM									
27764 UAT - Initiate Appointment Process Lubel, Samantha 03/20/13 12-41:59 PM Test Play/Testing Branch 04/10/1	UAT - Recruitment	Lubel, Samantha	Lubel, Samantha		03/19/13 02:41:20 PM	Test	Play/Testing Branch			Dog Walker	GS	0665		04/10/13
	UAT - Initiate Appointment Process	Lubel, Samantha	Lubel, Samantha		03/20/13 12:41:59 PM	Test	Play/Testing Branch							04/10/13
						li i l	/							
1		UAT - Benefits Process UAT - Change In Work Schedule / Hours UAT - Recruitment Request UAT - Recruitment UAT - Initiate Appointment Process	UAT - Benefits Process Verget, Terrye UAT - Change in Work Schedule / Hours Purber, Kate UAT - Recrutment Request UAT - Recrutment Lubel, Samantha	UAT - Benefits Process Verge, Terrye Verge, Terrye UAT - Change in Work Schedule / Hours Purber, Kalte Purber, Kalte UAT - Recruitment Reguest UAT - Recruitment Process Lubel, Samantha Lubel, Samantha UAT - Initiate Appointment Process	UAT - Benefits Process Verge, Terrye Verge, Terrye UAT - Change in Work Schedule / Hours Purber, Kalle Purber, Kalle UAT - Recruitment Reguest UAT - Recruitment Process Lubel, Samantha Lubel, Samantha UAT - Initiate Appointment Process	UAT - Benefits Process Verge, Terrye Verge, Terrye UAT - Change in Work Schedule / Hours Purber, Katie Purber, Katie 03/19/15 10:51:06 AM UAT - Recruitment Reguest 03/19/15 02:40:55 PM UAT - Recruitment Lubel, Samantha Lubel, Samantha 03/69/13 02:41:20 PM UAT - Initiate Appointment Process Lubel, Samantha Lubel, Samantha 03/20/15 12:41:59 PM	UAT - Renefits Process Verge, Tenye Verge, Tenye Test UAT - Change In Work Schedule / Hours Purber, Kalle Purber, Kalle 03/19/13 10:55:06 AM Test UAT - Renutment Request 03/19/13 02:40:55 PM UAT - Renutment Lubel, Samantha Ubel, Samantha 03/20/13 12:41:39 PM Test UAT - Intele Appointment Process Lubel, Samantha Ubel, Samantha 03/20/13 12:41:39 PM Test	UAT - Benefits Process Verge, Terrye Test Play/Testing Branch UAT - Change In Work Schedule / Hours Furber, Kalle 00/19/13 02-10:55 GM Test Play/Testing Branch UAT - Recruitment Request 00/19/13 02-10:55 GM 00/19/13 02-10:55 GM Test Play/Testing Branch UAT - Recruitment Request 00/19/13 02-10:55 GM 00/19/13 02-10:55 GM Test Play/Testing Branch UAT - Initiate Appointment Process Lubel, Samantha 00/20/11 12-11:59 FM Test Play/Testing Branch	UAT - Benefits Process Verge, Terrye Test: Plany/Testing Branch Dan UAT - Change In Work Schedule / Hours Purber, Kalte 03/15/13 10:51:06 AM Test: Plany/Testing Branch Catherine UAT - Accruitment Request 03/15/13 00:51:06 AM Test: Plany/Testing Branch Catherine UAT - Recruitment Request 03/15/13 00:41:00 PM Test: Plany/Testing Branch UAT - Initiate Appointment Process Lubel, Samantha 03/16/13 02:41:00 PM Test: Plany/Testing Branch	UAT - Benefits Process Verge, Terrye Test: Play/Testing Branch Dan Snyder UAT - Benefits Process Verge, Terrye Test: Play/Testing Branch Dan Snyder UAT - Change In Work Schedule / Hours Purber, Kate 03/15/13 10:51:06 AM Test: Play/Testing Branch Catherine Purber UAT - Recruitment Request 03/19/13 02:41:05 PM Test: Play/Testing Branch UAT - Initiate Appointment Process Lubel, Samantha 03/20/13 12:41:59 PM Test: Play/Testing Branch UAT - Initiate Appointment Process Lubel, Samantha 03/20/13 12:41:59 PM Test: Play/Testing Branch Image: State St	UAT - Benefits Process Verge, Terrye Verge, Terrye Verge, Terrye Test Play/Testing Branch Dan Snyder Redstins Owner UAT - Ghange in Work Schedule / Hours Ruber, Kalle 03/19/13 10:51:06 AM Test Play/Testing Branch Catherine Ruber Industrial Hygienist UAT - Accountment Request 03/19/13 10:51:06 AM Test Play/Testing Branch Dig Waiter UAT - Accountment Request 01/20/13 10:21:41:20 PM Test Play/Testing Branch Dig Waiter UAT - Insteits Appointment Process Lubel, Samantha 03/19/13 12:41:20 PM Test Play/Testing Branch Dig Waiter	UAT - Benefits Process Verge, Terrye Verge, Terrye Verge, Terrye Test Pay/Testing Branch Dan Smder Redskins Owner GS UAT - Change in Work Schedule / Hours Ruber, Kalle Puber, Kalle 03/19/13 10:51:06 AM Test Pay/Testing Branch Catherine Ruber GS UAT - Accountment Request 03/19/13 00:40:55:06 AM Test Pay/Testing Branch Dog Walker GS UAT - Accountment Request 03/26/13 00:21:22:10:20:41:20:PM Test Pay/Testing Branch Dog Walker GS UAT - Initiate Appointment Process Lubel, Samantha 03/20/13 12:41:32:PM Test Pay/Testing Branch Dog Walker GS	UAT - Benefits Process Verge, Terrye Verge, Terrye Verge, Terrye Verge, Terrye Test Pay/Testrag Branch Dan Snyder Reddstrs Owner GS 1111 UAT - Ohange in Work Schedule / Hours Ruber, Kalle Purber, Kalle 03/15/13 10:51:06 AM Test Pay/Testrag Branch Calterine Furber 65 0690 UAT - Recruitment Request 03/19/13 02:41:32 PM Test Pay/Testrag Branch Dog Wafker GS 0655 UAT - Initiate Appointment Process Lubel, Samantha 03/20/13 12:41:32 PM Test Pay/Testrag Branch Dog Wafker GS 0655	UKT - Recruitment Request Verget, Terrye Verget, Terrye Verget, Terrye Test. Play/Testing Branch Dan Snyder Reddins Oniner CS 1111 15 UKT - Change in Work Scheckle / Hours Furber, Kale 03/19/13 10:51:06 AM Test. Play/Testing Branch Catherine Furber Industrial Hygerist GS 0650 13 UKT - Recruitment Lubel, Samantha 03/19/13 02:41:05 PM Test. Play/Testing Branch Dog Walker GS 0665 10 UKT - Insteis Appointment Process Lubel, Samantha 03/20/13 12:41:59 PM Test. Play/Testing Branch Dog Walker GS 0665 10

- 3) Select the "Organizational Unit" tab at the top of the screen.
- 4) **Click** on the "+" to expand the folders and locate the part of the organization you wish to direct the action.
- 5) **Click** on the name of the Division/Team which contains the individual you are forwarding to. A list of WiTS users will appear along the right side of the pop-up window.
- 6) **Click** on the name of the individual who should receive the action. **Note**: You can only forward to one person.



Once the individual's name appears in the text box at the bottom of the pop-up window, click OK. The user will receive a notification that a new work item is in their Worklist.

The WiTS Quick Search feature is available to users who wish to find work items in the BizCoves.

1) Locate the Quick Search button in the BizCove you wish to conduct your search:

Note: To locate **Active Actions**, conduct your search in the **Worklist** or **Active Transactions** BizCoves. If the action you wish to search for has been completed, you will find it in **Archives**.

2) After you *click* within the **Quick Search box**, question marks will appear next to each column header. These are the columns that WiTS will search in for your desired text.

	WITS #	Process Name	Priority *	A HRS	HRA	Date Recd	Action Type *	IC *	Org Initials 7	FName *	LName
1	21766 UA	AT - Special Pay Process			1	11/07/10 08:20:41 PM	Special Pay	100	· · · · · · · · · · · · · · · · · · ·		
	21767 UA	T - Senior Level Pay Process			11	11/07/10 08:21:08 PM	Senior Level Pay				
	21768 UA	T - Recruitment Request	High			11/07/10 08:21:34 PM	Recruitment Request				
	21774 UA	AT - LWOP Process									
1	21775 UA	T - LWOP Process									
	21776 UA	AT - LWOP Process									
6	21777 UA	AT - LWOP Process									
					1	(1)	1 2 3 4 1	5 🕨			
						dk Search:	T Monitor Detail		tvanced Search	Excel	

- 3) **Type** in your search value (name, number, date, etc.) WiTS will search the BizCove for all actions that contain your search criteria.
- 4) *Click* on the "**Tornado**" ^T icon to begin the search.
- 5) The BizCove will refresh and display only actions with text that matches your search in any of the columns.

Note: If it is empty, no matches were found for your criteria.

Note: You will need to *click* on **Clear Search Filter** to clear your search. This will refresh the BizCove to display all actions and you may begin a new search if needed.

	▲ WiTS #	Action Type 7	HRS 7	HRA 7	CU Classifier	Date Recd 7	IC 7	Org Initials 🕈	FName 7	LName 7	Pos. Title 7	PPlan 7	Series 7	Grade 7	Prop. Eff. Date
		UAT - Initiate Appointment Process	Lubel, Samantha	Lubel, Samantha		E PI		Play/Testing Branch		1					04/10/13
	27776	UAT - Appointment	Lubel, Samantha	Lubel, Samantha		03/20/13 12:47:18 PM	Test	Play/Testing Branch	Samantha	Lubel	NIH-TEST-DE-13- 27736	GS	0665	11	
	28537	UAT - Appointment	Lubel, Samantha	Lubel, Samantha		07/01/13 08:53:24 AM	Test	Play/Testing Branch	Michael	D andrea	Biologist	GS	0401	09	07/29/13
F	Filtered seard	h result. <u>Clear Search Filter</u>					*								
		Quick Search: appointm	ent 🛛 💎 🗌	Open Selected A	ction	Forward to Anoth	ner Use	r M	onitor Select	ted Process	s Export	List to Ex	cel		

Reports & Metrics Information

WiTS provides several types of reports that can be exported to Excel, PDF, or Word.

Using the Reports Feature in WiTS

WiTS data may be extracted using the reporting feature. All WiTS reports are found in the **WiTS Reports** BizCove.

Metric data is available in some reports; for example, you may find the average processing times on recruitment and awards reports.

Generating a WiTS Report

- 1) *Locate* the **WiTS Reports** BizCove at the top of your Work Area Page. This list contains the predefined reports that are currently available to you in WiTS.
- 2) Click Access WiTS Reports.

WiTS Reports		0
Name	Description	
Access WiTS Reports	Page where you can select a report, define your parameters and generate your report. Also includes links to Quick Reference Guides about each report.	

2) Select the report you wish to run from the drop down menu. Once selected, refer to the report

discription for more information about the report – the "**Help**" ² icon contains a Quick Reference Guide explaining the report.

	Choose a Report List:	Select Your Report:	
CSD Report List	•	Appointment Actions Report	* -
	This report provides information about actions asso	ciated with the hiring of new employees. 🛛 🏾 🇨	

3) Parameters specific to the report you selected will need to be chosen so that you may customize your report results. Access to reports and data are based on your permissions, i.e., CSD Branch staff can view reports for IC's assigned to his/her Branch, etc. Change the default settings to define the specific parameters for your report. Information about each parameter is provided in the "Help"

icon next to each field.

CSD Report List	Choose a Report List		-	Select Your Report: Appointment Actions Report
	This report provides info	mation about ac		ciated with the hiring of new employees.
Status of Actions:		All	•	Ø
Generate Report By:	Date Action	Received in HR	•	0
Start Date:		7/15/2013		0
End Date:		7/15/2013	; 🗐	0
Generate report using :		Calendar Days	•	Θ
Sort 1:		WiTS#	•	0
Sort 2:		IC	•	0
Sort 3:		Admin Code	•	0
IC:		ALL	•	0
Search Admin Code:		Exact	▼ ALL	0
Branch:		ALL	•	0
Display By:		ALL	•	0
HR Specialist:	ALL		-	0
HR Assistant:	ALL		-	0
HR SPA:	ALL		-	0
Appointment Type:	ALL		•	0
Is this a report that you	will be running on a regu	🖩 Go	more abou enerate Re nerate Re Complian	port

4) Click the "Generate Report"

Generate Report

F

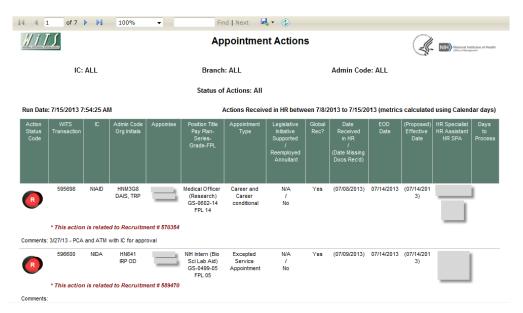
button to run the report. Note: You have the option of running a 508 Compliant Report. This export option presents the data in a format that is accessible for users using screen readers and other assistive technology. Select the

> **Generate Report** (508 Compliant Export)

"Generate Report (508 Compliant Export)" button to run this report. Note: A message box may appear indicating that the database search is in progress and your report data is loading.

Is this a report that you will be running on a regular basis? Learn more about automated report delivery via the WiTS Report Subscription Service
團 Generate Report
圈 Generate Report (508 Compliant Export)
Clear Selections

5) The requested report is generated and displayed in a new window as shown below. Each report will look slightly different.



Options to Navigate, View, Export and Print Reports

WiTS offers several additional options to view and present WiTS data.

The Report toolbar options are described as follows:

of 17 🕨 🚺	100%		Find N	lext 🛃	• 🛞
		6 P			

Toolbar	Option	Description
	Export / Print	Export the report data to another software application for viewing/editing/printing. Export options include:

٢	Refresh	 Print Adobe Acrobat (PDF); MS Word (DOC); Excel (XLS) Refreshes report data
<u> </u>	Go to page	<pre>Go to first page Go to previous page I/1 = Current View page #/# of total report pages Go to next page Go to last page</pre>
100% ▼ Page Width Whole Page 500% 200% 150% 100% 50% 25% 10%	Zoom	Default is 100%. Allows users to select from drop-down menu to resize and refresh report screen view.
Find Next	Search for Text	Allows users to enter a keyword or number and locate it in the Report.

Exporting Report Data

1) From the report toolbar, *click* on "Export" icon. A drop down menu appears opens that allows you to choose which software application to export (save) the report data to:

I	Find Next	4 • 2	
<u>#175</u>	Appointme	Print Excel	National Institutes of Health
		PDF	X
IC: ALL	Branch: ALL	Word Admin Code: ALL	

PDF (Adobe Acrobat) - Keeps report formatting Microsoft Word - Allows user to make modifications to the report Microsoft Excel - Allows for manipulation and editing of data, including addition of calculations and filtering

Tip: Select the file type appropriate to the need. For example, if you wish to edit and manipulate report data, Excel would probably be the best option. If you wish to share an un-editable report, then PDF would be the best option.

Printing WiTS Reports

- **R** -
- 1) From the Report toolbar Export Icon, **select "Print**". A pop-up window opens that allows you either open or save the report in the default PDF (Adobe Acrobat) format. The report opens in Adobe Acrobat. You are then able to print the report from Adobe Acrobat by entering **Ctrl + P**.

System Preferences

WiTS has several preferences that users have the option of editing and using. *Click* the "**Preference**" link along the very top right corner of the WiTS main screen to open the Preferences window.

Will	🙎 Lubel 🛛 07/15/13 🍳 Management 🧟 Preferences 🚇 Help Log Out
Worklist Process Definition Process Instances Process Archives Global Variable	(Default) -

The *General* tab will appear giving you access to optional user settings. Most users will not have to make any changes on the general tab. Occasionally, some users will not get their pop-up notifications. If this occurs, users should:

- 1) Click the Display New Work Item Notification Message (to remove the check in the box)
- 2) Re-click the Display New Work Item Notification Message to re-add the check in the box
- 3) Click on Apply
- 4) Close out of the Preferences window
- 5) Log Out of the System
- 6) Log back in

These steps will re-enable this feature for users.

🔗 Preferences - Windows Internet Explorer	×
General Absence Signature Notification	
Enable Accessibility	
Display New Work Item Notification Message	
Check Password Upon Completion of Work Item	
Display Worklist With No Check Boxes	
Get Next Work Item Automatically	
Display Worklist Statistics	
Date Time Display Format: MM/dd/yy hh:mm:ss aa 👻	
Apply Close	Help
	,

Note: It is recommended that you not alter "Enable Accessibility" or the "Date Time Display Format."

Setting User Absence (Out of Office)

WiTS allows you to designate someone else to complete your workitems in your absence. When the designated user clicks Designated Work in *their* Work Area, the work that has been designated to them is displayed.

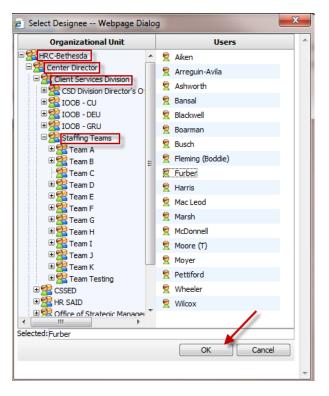
Using the *Absence* tab, you can set the absence start and end dates, designate another user to handle your actions, and create a message to be displayed during your absence.

To set an absence:

- 1) *Click* the "Absence" tab.
- 2) Enter the start and end dates and times for your absence in the respective boxes.
- 3) **Click** the "**Designate**" button to select the person who will receive your work items during your absence from the organization tree.

Preferences - Windows Internet Explorer	
General Absence Signature Notifica	tion
Start Date	Clear
End Date	Clear
Designate	Clear
Message To Display During Absence	*
	Apply Close Help

4) Locate the person who will be receive your work during your absense.



5) *Type* a **message** that will appear to the designated person.

- 6) Click "Apply".
- 7) Click "Close" to exit the Preference dialog box and return to the WiTS main screen.

Preferences - Windows Internet Expl	Notification	
Start Date	07/17/13 12:00:00 AM	Clear
End Date	07/18/13 12:00:00 AM	Clear
Designate	Furber	Clear
Message To Display During Absenc		^
		T
	Apply	Close Help

Signature

The Signature tab is not being used at this time.

Notification

The *Notification* tab displays the email address which is currently on file for you in the WiTS system. This is the email address that the auto-generated workitem emails will be sent to notify of your new actions.

🤌 Preferences - Windows Internet Explorer			
General A	bsence Signature Notification		
E-Mail	lubelsl@mail.nih.gov	E.g.: bizflow@handysoft.com	

Getting Help

Should you need help using WiTS, you have several options available to you to get assistance. A threetiered system is in place to assist with all levels of questions.

Tier I support consists of WiTS Super Users. These are members of your organization with an advanced level of knowledge and troubleshooting skills related to WiTS who are available to assist staff in resolving some of the more common problems / issues.

Tier II support consists of SAID's HR Systems Support team. Support at the Tier II level and beyond is only accessible via HR Systems Support.

Tier III consists of the WiTS technical support team.

If you need help with WiTS, you should:

First: Read the guidance (User Guides, Quick Reference Guides, FAQ, etc.) located on the **HR Systems Support Self Help** BizCove to see if your issue is addressed in any of these documents.

C HR Systems Support Self Help	₽ 8
Please visit <u>HR Systems Support Self Help</u> to find answers to many common questions.	
For general information about WiTS, including User Guides and Online Tutorials, please visit the WiTS Page on the OHR website.	

Next: Consult your WiTS Super User to see if the issue can be resolved internally.

If your WiTS Super User cannot rectify the problem, then;

Contact HR Systems Support. HR Systems Support will then make the determination as to where the ticket needs to be directed.

- Initiate a HRSS request within WiTS at <u>http://wits.od.nih.gov</u> (preferred) or
- E-mail <u>HRSystemsSupport@od.nih.gov</u>

To initiate a Help Desk ticket in WiTS:

- 1) Locate the HR Systems Support Action Initiation BizCove.
- 2) *Click* on the **name** of the process to be started (HR Systems Support), **OR** *Click* on the **checkbox** next to the process name.
- 3) *Click* the "Start" Start button.

8	🛞 HR Systems Support Action Initiation				
	▲ Name	Description			
[7]	Request for HR Systems Access (and User Profile Changes/Deletions)	WITS Super Users, Branch Chiefs, Deputy Division Directors and Division Directors can use this workflow to request new, modified or deleted access to HRSS supported systems (Capital HR, eOPF, WITS, HHS Careers, Classification, etc.).			
V	Request for HR Systems Support	Use this workflow to submit support requests for HR systems such as HHS Careers, Classification, Portal, WiTS, Capital HR (CHR), etc. Initiate a separate request per system.			
		Start			

- 4) Complete "Section 1" of the HRSS form. Describe your issue as clearly as possible and attach a screenshot of any error message you may be receiving. Be sure to complete the fields for your contact information (email and telephone) so that HRSS will be able to contact you for more information if needed.
- 5) **Select** "Initiate Ticket" from the drop down menu.

Routing Initiate ticket 🛛 🌄 Complete 🛃 Save	🐶 Comment 🚔 Print 样 Exit without say	ng		
<u> </u>	HR Sys	stems Support Request		Antonia Institutes of Health
Ticket Information				
SECTION 1 - Ticket Information				* Required Fields
SECTION 1 - Ticket Information				
Ticket #		Date Initiated	07/15/2013 09:10 AM	
Status*	Pending	Priority Code*	Moderate -	
Full Name of User*		User Email*		
User Phone# (no dashes)		Organization*		-
Total Number of Users Affected		IC*	•	
System*		 Issue Category* 	•	
			*	
Description of Issue or Request				
Description of Issue of Request	Note: Do NOT optor CON Info	ermation in this area or attach any documents containing such i	information to this request	
	Note: Do NOT enter 55N Inte	rmation in this area or attach any occuments containing soch	mormation to this request.	
				\
Attached Files				
Attached Files There are no attachments.				_

3) *Click* the "**Complete**" icon to the right of the response drop-down list. This will send the ticket to the HR Systems Support (help desk) for further action.

Note: You may monitor the status of your ticket in the **My Active HR Systems Support (Help Desk) Transactions** BizCove on your Work Area Page. Once the ticket has been resolved, an e-mail summarizing the problem and resolution will be sent to you.