# SERVICE AWARD EFORM TRAINING GUIDE - AGENCY SERVICE AWARD COORDINATOR

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## TN Service Award Coord eForm

## About TN Service Award Coord eForm

The TN Service Award Coord eForm provides users the ability to request a service award, evaluate a service award, update a service award, or view a service award eform. The Service Award eform is not automated to order the items from a vendor. A query named: TN\_HR15\_SERVICE\_AWD\_ITEM\_SELEC maybe used to return a list of items that were selected on each eform by emplid.

#### Roles Required

The TN1\_HR\_SERVICE\_AWARD\_COORD role is required for Service Award Coordinators. DOHR Service Award Administrators have access to the TN Service Award Coord eForm with the TN1\_HR\_DOHR\_SVC\_AWD\_ ADMIN role. Users will be able to see emplies based on their department level security.

## **Functionality**

Each step available on the TN Service Award Coord eForm page has distinct information about the step above the instructions on how to complete the step. Please review each step carefully.

The Coordinator can use the Request a Service Award eForm step to submit a service award for an employee. The Coordinator can use the Evaluate a Service Award eForm step in the event an employee is unable to access the TN Service Award eForm in Self Service. The Evaluate a Service Award eForm displays the Employee Award Selection section of the form, allowing the user to select a service award. The Coordinator can use the Update a Service Award eForm step, if it becomes necessary to Withdraw a Service Award in events such as the employee termed before the employee evaluated the form. The Update a Service Award eForm page also has a Resubmit button which will allow new coordinators to become reassign the service award eForm to themselves, in the event a Coordinator is no longer with the State or becomes unavailable.

#### Service Award Coordinator Step Instructions

The Instructions page provides information to Coordinators about service awards. There are links available to open pdf files for Policy, a Contract Link, a Coordinator Guide, and Coordinator Frequently Asked Questions.



# Request a Service Award eForm

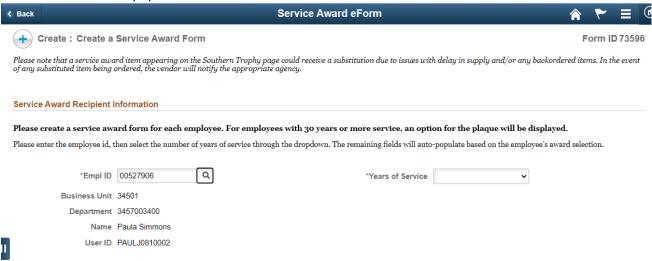
## About Request a Service Award eForm

The Request a Service Award eForm step enables Service Award Coordinators or DOHR Service Award Administrators to submit an eForm for the employee who is to receive a service award.

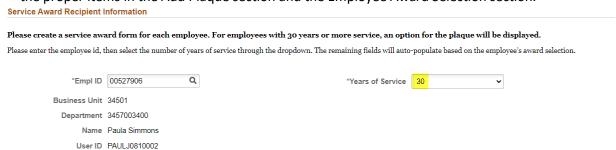
#### Roles Required

The TN1\_HR\_SERVICE\_AWARD\_COORD role is required for Service Award Coordinators. DOHR Service Award Administrators have access to the TN Service Award Coord eForm with the TN1\_HR\_DOHR\_SVC\_AWD\_ ADMIN role. The coordinator will use the Request a Service Award eForm step to submit a service award for an employee. Users will be able to see emplids based on their department level security.

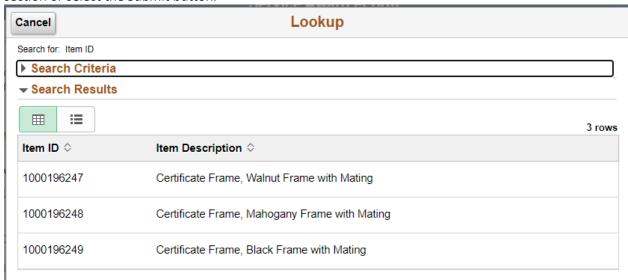
- 1. Select the Request a Service Award eForm step from the navigation provided on the left-hand side of the page
- 2. In the Service Award Recipient Information Section, enter an emplid or use the magnifying glass to search for an emplid. When the emplid is entered, the Business Unit, Department, Name, and User ID fields will auto-populate as shown below.



3. Select the dropdown list using the V symbol in the field or enter the number of service years. An error will be incurred if the number entered does not match a number in the dropdown list. The Years of Service values start with 5 and is incremented by 5 up until 60. This field is critical to display the proper items in the Add Plaque section and the Employee Award Selection section.



4. In the Service Award Certificate Frame section, select the magnifying glass icon in the Item ID field to return a list of frames available to choose from. If the business unit does not wish to give the employee a certificate frame, leave this field blank and either move forward to the Add Plaque section or select the Submit button.



Selecting the Item ID will auto-populate the Prod #, Item Name, and Item Details fields, as shown below:



5. In the Add Plaque section, select the magnifying glass icon in the Item ID field to return a list of plaques available to choose from. If the Years of Service selected in the Service Award Recipient Information section is greater than or equal to 30, the Add Plaque section will display. If the Years of Service selected is less than 30, then the Add Plaque section will not display. If the business unit does not wish to give the employee a plaque, leave this field blank and select the Submit button.



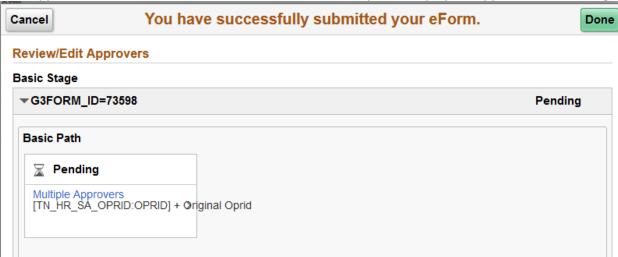
Selecting the Item ID will auto-populate the Prod #, Item Name, and Item Details fields, as shown below:



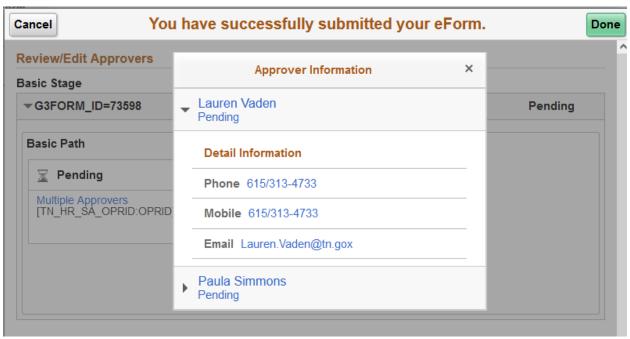
6. The Results page will open after the Submit button is selected.



The service award coordinator may choose to view the approval route or the refresh log button. If the approval route button is selected a modal window will open to display the approvers and routing.



The status displayed will be Pending – to view the approvers, select the Multiple Approvers link.



Select the arrow next to each name to see the detail information for the approver.

#### Evaluate a Service Award eForm

#### About Evaluate a Service Award eForm

After a request for a service award has been submitted. The form is sent to the employee so they can choose the service award they would like to receive. The employee may choose any item in the dropdown list of service awards. The years of service entered on the request in the Service Award Recipient Information section determines which items will display in the list available for the employee to choose from. The employee may select any item that is assigned a year of service less than or equal to their years of service. The employee will not see the Service Award Certificate Frame section or the Add Plaque section. These sections are hidden from the employee in case the business unit does not choose to order a frame or plaque (or both).

The Evaluate a Service Award form is also routed to the service award coordinator who submitted the request. In the event the employee is unable to access the service award eForm, the evaluate a service award eForm step may be completed by the service award coordinator.

#### Roles Required

The TN1\_HR\_SERVICE\_AWARD\_COORD role is required for Service Award Coordinators. DOHR Service Award Administrators will have access to the TN Service Award Coord eForm with the TN1\_HR\_DOHR\_SVC\_AWD\_ ADMIN role. The Coordinator will use the Request a Service Award eForm step to submit a service award for an employee. Users will be able to see emplids based on their department level security.

The TN1\_HR\_EMPLOYEE is required for employees to Evaluate or View a Service Award eForm that was submitted for them. The TN1\_HR\_EMPLOYEE is assigned to all state employees.

#### **♦ Service Award eForm** Service Award eForm **↑** ► **■ ②** Search by: Instructions Form ID Begins With Request a Service Award eForm Q Begins With Form Type Evaluate a Service Award eForm is Equal To Form Status Update a Service Award eForm Q Begins With Empl ID View a Service Award eForm Begins With Description Q Begins With **Engraving Text** Clear

#### 1. Select the Evaluate a Service Award eForm

The employee (or the coordinator, if employee is unable to access the eForm) may choose to search by entering the information into any of the fields or leaving the search fields blank and selecting search. Select on any of the hyperlinked fields in the rows returned from the search to open the service award eForm.

The only active sections on the Evaluate form are the Engraving and Employee Award Selection sections.

Service Award eForm	Form Page	♠ ≡
Submit : Submit a	Service Award Form	Form ID 73576
	rd item appearing on the Southern Trophy page could receive a substitution due to issues with delay in supply and/or any backordered items. In the even, the vendor will notify the appropriate agency.	ent of any
Service Award Recipient I	nformation	
Please create a service awa	ard form for each employee. For employees with 30 years or more service, an option for the plaque will be displayed.	
Please enter the employee id, t	hen select the number of years of service through the dropdown. The remaining fields will auto-populate based on the employee's award selection.	
Empl II	D 00497224 Years of Service 35	
Business Un		
	at 3171700002	
	e Vickie Gilliam	
User II	VICKL0712003	
Engraving		
Please enter the text below if y	our item qualifies for special engraving.	
Engraving Te	tt Vickie Gilliam	
Employee Award Selection		
Employee Award Selection		
Congratulations on achieving y	our service year milestone! Please visit Southern Trophy to view the award selections based on your service year milestone.	
If using the search function to i	and the award you would like to select, enter the Prod # in the Value and/or the vendor's description in the description field.	
Description	a Q	
Prod :		
Item Name		
Item Nam		
Item Detail:		
	m	
Comments		
. Journal of the control of the cont		
Search Deny F	tecycle Hold Approve	

2. Engraving section – If the service award selected includes engraving, the employee (or the coordinator, if employee is unable to access the eForm), may change their name to the name they would like engraved on the service award.



3. Employee Award Selection section – The the employee (or the coordinator, if employee is unable to access the eForm), should select the Southern Trophy hyperlink to open the Southern Trophy website to view a catalog of items available.

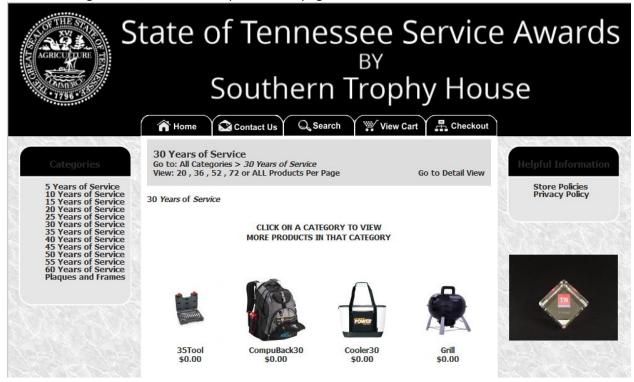
**Employee Award Selection** 

Congratulations on achieving your service year milestone! Please visit Southern Trophy to view the award selections based on your service year milestone.

If using the search function to find the award you would like to select, enter the Prod # in the Value and/or the vendor's description in the description field.

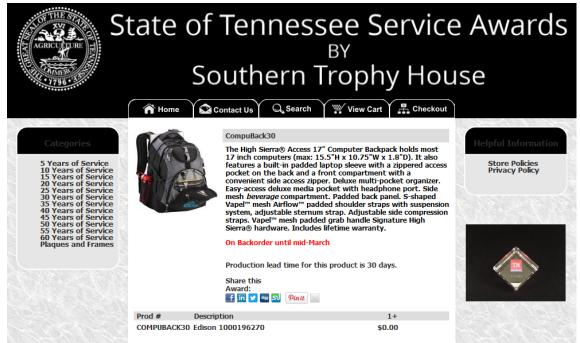
Note: Right click on the Southern Trophy website link to open the website in either a new window or a new tab.

After selecting the link, the website opens to this page.



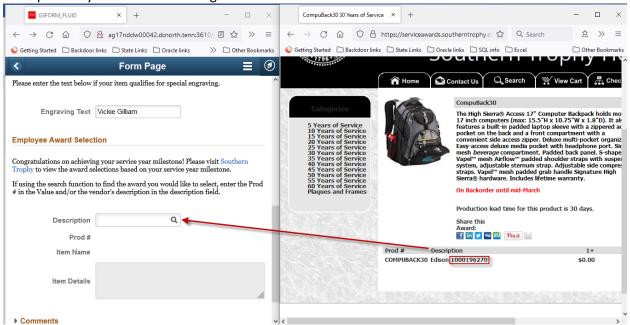
The employee (or the coordinator, if employee is unable to access the eForm), can view any of the categories but may only choose from a category less than or equal to their years of service.

- 4. The employee (or the coordinator, if employee is unable to access the eForm), selects a category, and a page will open to show the items available.
- 5. Select an item to view the details and to retrieve the Edison ID number or the Prod #.

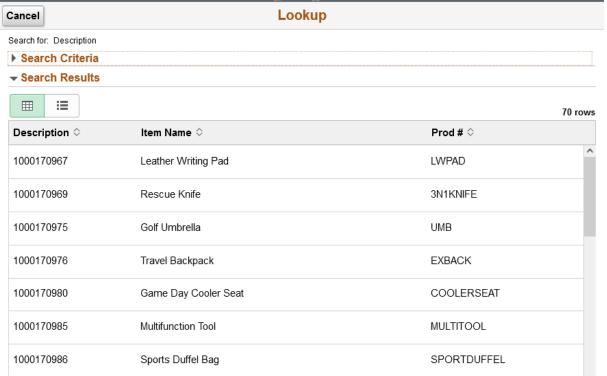


After selecting which item, the user would like to order, they can return to the service award eForm to complete the Employee Award Selection section.

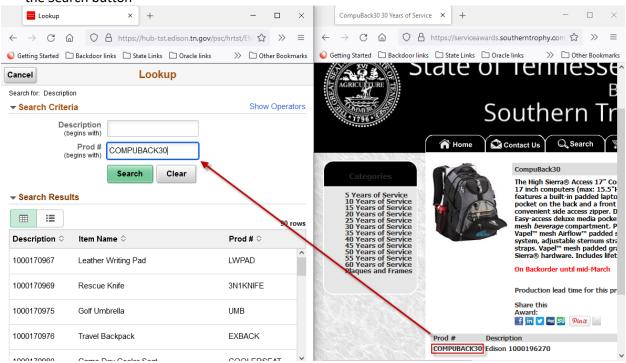
The fields on the search form for Description and Prod # match the fields shown on the vendor website to help identify which information goes in which field.



- 6. The employee (or the coordinator, if employee is unable to access the eForm), may copy or write down either the Prod # or the number portion of the Description to use in the search field.
- 7. Alternatively, select the magnifying glass icon to return a list of items the user is eligible to receive.



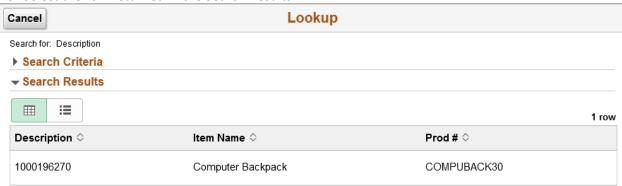
- 8. Select the Search Criteria arrow to expand the search criteria section.
- 9. Either enter the number portion of the Description like Edison **1000196270** or the Prod # and select the Search button



#### 10. Select the row returned in the Search Results

Item Name Computer Backpack

Item Details



Selecting the row returned will auto complete the Prod # Item Name, and Item Details fields.

Employee Award Selection

Congratulations on achieving your service year milestone! Please visit Southern Trophy to view the award selections based on your service year milestone.

If using the search function to find the award you would like to select, enter the Prod # in the Value and/or the vendor's description in the description field.

Description | 1000196270 | Q |
Prod # COMPUBACK30

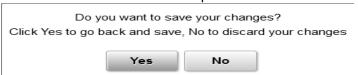
The High Sierra® Access 17" Computer Backpack holds most 17 inch computers (max: 15.5"H x 10.75"W x 1.8"D). It also features a built-in padded laptop sleeve with a zippered access pocket on the back and a front compartment with a convenient

#### 11. Select the Approve button.



Selecting the Deny button will terminate the service award eform. Do not select the Recycle button or the Hold button. The recycle button will send the eForm back to the evaluation queue and the hold button will send the eForm to the Update queue. If the employee (or the coordinator, if employee is unable to access the eForm), does not wish to approve the eform currently, navigate away from the eform. The user will receive a message asking if they wish to save the information. The user can select No and the eform will be retained in the Evaluate a Service Award eform queue to re-evaluate at a future time.

Message displayed if the user chooses not to approve the eform and elects to return the eform to the Evaluate a Service Award eForm queue.



12. After the form is approved the Results page will display



13. Select the View Approval Route button.



Note the status is approved. This means the form has been executed. If desired, the user can select the down arrow next to G3FORM\_ID to see who the approver was.



# Update a Service Award eForm

## About Update a Service Award eForm

The Update a Service Award eForm step enables Service Award Coordinators or DOHR Service Award Administrators to Withdraw or Resubmit a service award eForm. The Update a Service Award search will only return eForms in a Pending, Hold, Recycled, or Saved status. Using the Withdraw button will terminate the form. This option may be chosen when the employee receiving the award is no longer with the State of Tennessee.

The Resubmit button should be used if the Service Award Coordinator who submitted the request is no longer with the State of Tennessee or is unavailable. Resubmitting the form will re-assign the eForm to the coordinator who selected the resubmit button. To reassign a Service Award Coordinator, resubmitting an eForm must be done before the employee completes the Evaluate a Service Award eForm step. If a form is resubmitted, the employee will not receive another email. If any notification is needed, the user will need to notify the employee. After the employee or the service award coordinator completes the evaluate step, the form will be in executed status. If changes are needed to an executed eForm, a new Request a Service Award eForm step must be initiated and completed.

#### Roles Required

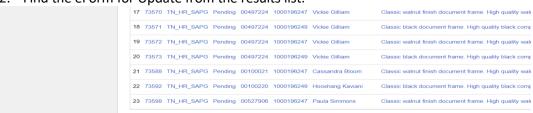
The TN1\_HR\_SERVICE\_AWARD\_COORD role is required for Service Award Coordinators. DOHR Service Award Administrators will have access to the TN Service Award Coord eForm with the TN1\_HR\_DOHR\_SVC\_AWD\_ADMIN role. Users will be able to see emplies based on their department level security.

1. Select the Update a Service Award eForm step



The user may choose to search by entering the information into any of the fields or leaving the search fields blank and selecting search. Select on any of the hyperlinked fields in the rows returned from the search to open the service award eForm.

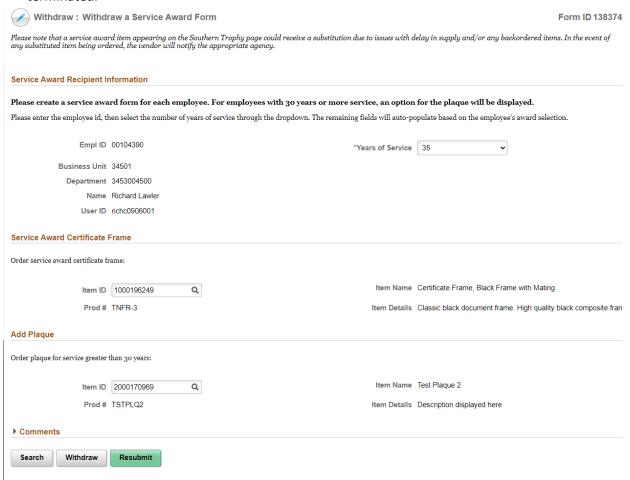
2. Find the eForm for Update from the results list.



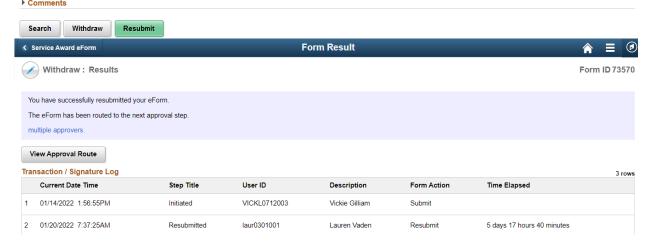
- 3. Scroll right on the results page to see the Business Unit and Original Operator for each eForm in the list
- 4. Select 1 of the rows returned in the Search Results to open the eForm. The Eform will open.

Years of Service ≎	ltem Name ≎	Business Unit $\Diamond$	Original Operator $\diamondsuit$	Original Date ≎	Last Operator	Last Date
45	(blank)	31701	VICKL0712003	2022-01-14	VICKL0712003	2022-01-14
35	(blank)	31701	VICKL0712003	2022-01-14	VICKL0712003	2022-01-14
35	(blank)	31701	VICKL0712003	2022-01-14	amyj0626001	2022-01-19
35	Rescue Knife	31701	VICKL0712003	2022-01-14	laur0301001	2022-01-19
45	(blank)	34501	laur0301001	2022-01-19	laur0301001	2022-01-19
35	(blank)	40100	amyj0626001	2022-01-19	laur0301001	2022-01-19
30	(blank)	34501	laur0301001	2022-01-20	laur0301001	2022-01-20

5. The coordinator may change the entries in the Select Award Certificate Frame, and Add Plaque sections. In the event the emplid on the eForm is not correct use the Evaluate a Request step to Deny the eForm. Then create a new Request a Service Award eForm for the correct emplid. If this occurs, the former employee will need to be informed that the eForm was entered in error and terminated.

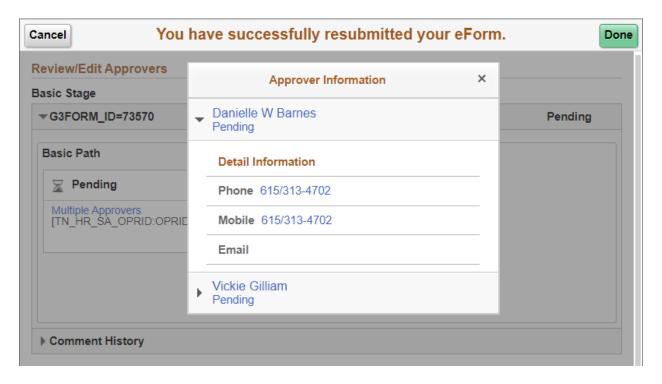


6. After changes are made to the Award Certificate Frame section or the Add Plaque section, select the Resubmit button, the results page will open, and the user may view the approval route or see the history for submit or resubmit for the eForm.



The results list will display the current/date time, step title, userID (of the submitter), the Description, Form Action, and Time Elapsed.

## 7. Select the View Approval route button



The Approver Information displays the Employee who was assigned on the Update step in Pending status. It is now in the Evaluate queue for both the service award coordinator and the employee.

#### View a Service Award eForm

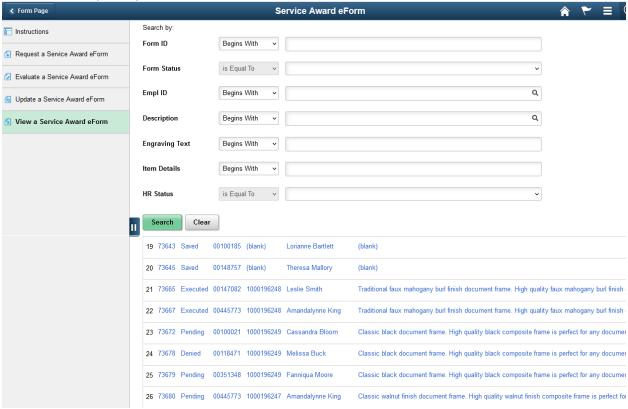
#### About View a Service Award eForm

The View a Service Award eForm step enables Service Award Coordinators or DOHR Service Award Administrators to view service award eForms regardless of status. Selecting a eForm from the results set will open the Service Award eForm in View only.

#### Roles Required

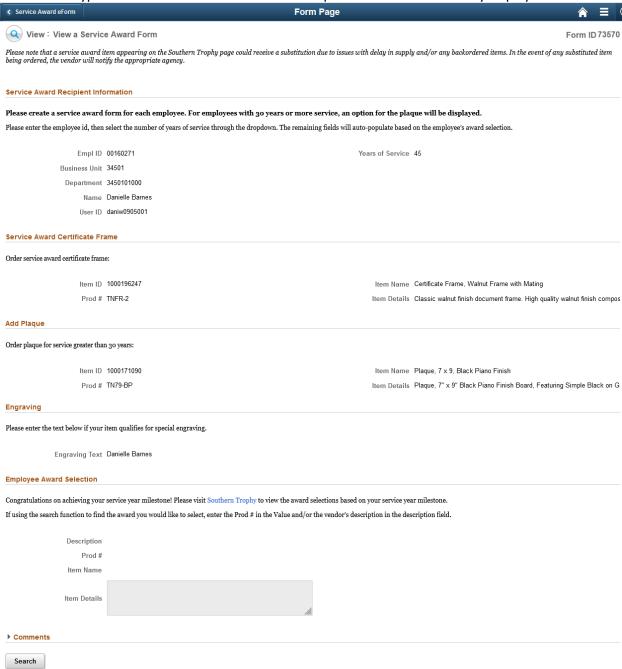
The TN1\_HR\_SERVICE\_AWARD\_COORD role is required for Service Award Coordinators. DOHR Service Award Administrators will have access to the TN Service Award Coord eForm with the TN1\_HR\_DOHR\_SVC\_AWD\_ADMIN role.

- 1. Select the View a Service Award eForm step
- 2. Select the Search button
- 3. Alternatively, complete 1 or more of the search fields to restrict the search results



Note: Service Award Coordinators can see eForms in a pending, saved, hold, recycled status that are in their authorized business unit(s). The View a Service Award eForm search will return all the eforms in any status based on the users authorized business unit(s).

4. Select a hyperlinked item in the row of results to open the eForm in view only display.



5. After completing the review of the eForm, select the Search button to be returned to the previous list of search results.

# TN\_HR15\_SERVICE\_AWD\_ITEM\_SELEC Query

# About TN\_HR15\_SERVICE\_AWD\_ITEM\_SELEC Query

The TN\_HR15\_SERVICE\_AWD\_ITEM\_SELEC Query was developed and is available in Edison for Service Award Coordinators or Service Award Administrators to extract a spreadsheet containing each of the items selected for an employee.

The query will return the item id, the item name, and the item details for the certificate frame, the plaque, and the award the employee selected.

A sample spreadsheet showing the results is inserted below.



Naming Convention for TN HR15 SERVICE AWARD ITEM SELEC Query



Field Name	Field Name Description
Business Unit	Business Unit of Employee Form was created for
Dept ID	Department ID of Employee Form was created for
Emplid	Edison Employee ID
Employee Name	Employee's Name
Years of Service	Years of Service Entered on the Service Award eForm
Form ID	ID Assigned to eForm when form was submitted
Form Status	Query only pulls forms in E (executed) status
Item ID (Award)	Item ID of the award the employee selected
Item Name (Award)	Short Description for the award
Item Detail (Award)	Long Description for the award found on vendor website
Item ID (Cert Frame)	Item ID of the certificate frame selected
Item Name (Cert Frame)	Short Description for the certificate frame
Item Detail (Cert Frame)	Long Description for the certificate frame found on vendor website
Item ID (Plaque)	Item ID of the plaque selected
Item Name (Plaque)	Short Description for the plaque
Item Detail (Plaque)	Long Description for the plaque found on vendor website
Name to Engrave	Name to Engrave on the award selected, if applicable
Form Create Date	Original Date the Request for a Service Award eForm was created
Last Oprid	Oprid of the user that approved the form in Evaluate a Service Award eForm

# TN\_HR15\_SVC\_AWD\_FORM\_STATUS Query

# About TN\_HR15\_SVC\_AWD\_FORM\_STATUS Query

The TN\_HR15\_SERVICE\_AWD\_ITEM\_SELEC Query was developed and is available in Edison for Service Award Coordinators or Service Award Administrators to extract a spreadsheet containing the status of eForms submitted.

The query will return the emplid, employee name, eForm status, the date the form was created and the oprid of the user who made the last changes to the eForm.

A sample spreadsheet showing the results is inserted below.



Uses the same naming convention as the TN\_HR15\_SERVICE\_AWARD\_ITEM\_SELEC query.