

A banner with a blue and white abstract background featuring glowing circles and lines. The text is centered in a bold, dark blue font.

**CAPPS HR/PAYROLL
End-User Training (EUT)**

**EUT Course - 130
HUMAN RESOURCES**

PeopleSoft 9.2
July 2016

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CAPPS HR

CAPPS Human Resources

Hiring Activities

Section 1: Hiring Activities

Objectives:

- Understand key concepts that affect the new process.
- Learn how to create an employee or contingent worker in CAPPS for a new hire, re-hire, or Return-to-Work Retiree.
- Learn how to assign a position to that person and enter their compensation.
- Learn what additional information needs to be entered for the new hire.

Please note that this training is specific to the CAPPS Human Resources system, and only covers the part of business processes that are performed in the system. Some processes may be affected by outside process steps, documentation requirements, or Agency-specific policies and procedures that are not covered in this training.

Creating an Employee and Assigning a Position

Section 1 Exercises, Lesson 1: Creating an Employee and Assigning a Position

Use the CAPPS Custom Hire page to create a New Hire in the system, add an Organizational Relationship, assign a Position, and enter Compensation.

Procedure

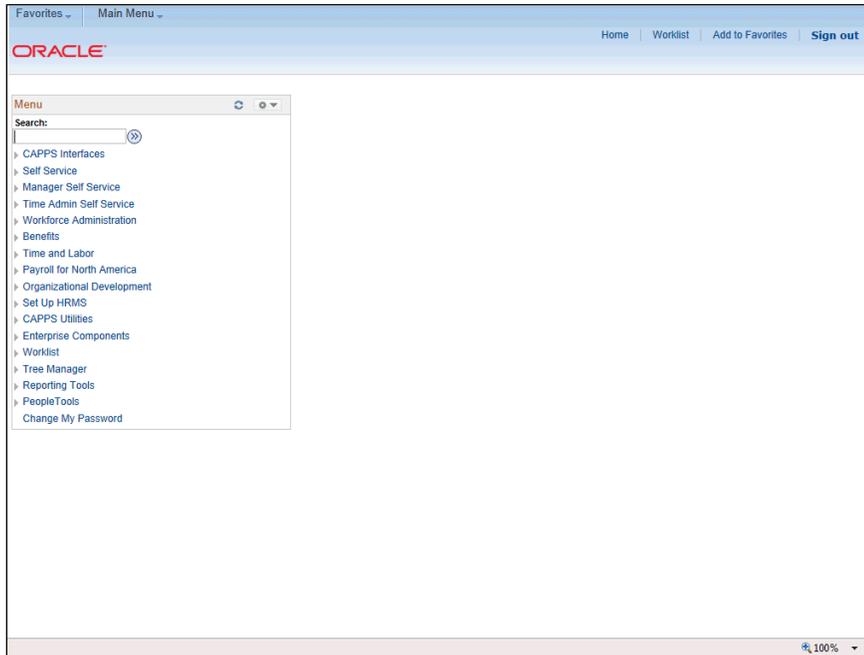
In this exercise, you will use the CAPPS Custom Hire page to create a New Hire in the system and add an Organizational Relationship.

Then you will use the Job Data page to assign a Position and enter Compensation.

Step	Action
1.	<p>When you have become familiar with navigating in CAPPS, you may prefer to use the menu links to find your screen.</p> <p>In these simulations you will use the Menu link at the top of the screen instead, so that the entire navigation path can be clearly demonstrated.</p>

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Step	Action
2.	Navigate to the CAPPS Custom Hire screen as follows: Click the Main Menu button. 
3.	Click the Workforce Administration menu. 
4.	Click the Job Information menu. 
5.	Click the CAPPS Custom Hire menu. Note: Later lessons in this course may skip through the navigation menus to this last step, which displays the whole path. 
6.	The navigation path to reach each screen is also displayed in the "breadcrumb" trail at the top of the screen.
7.	The CAPPS Custom Hire process begins with this screen. Here you will enter the National ID, Company, and Hire date for New Hires and Rehires.

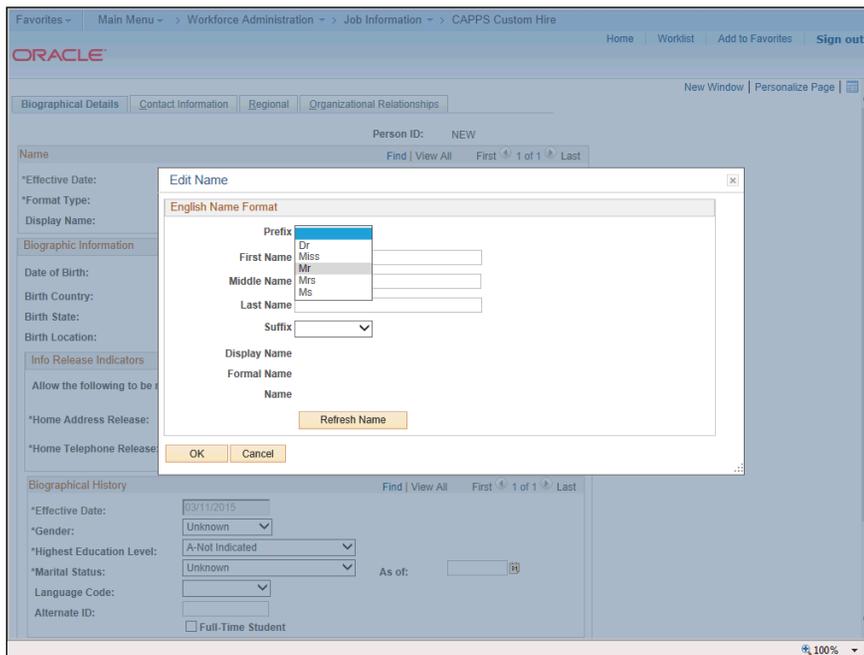
Step	Action
8.	<p>The National ID number is usually the employee's Social Security Number.</p> <p>Enter the desired information into the National ID field. For this example, enter "608999999".</p> <p>National ID <input data-bbox="570 499 867 541" type="text"/></p>
9.	<p>As soon as the National ID is entered, CAPPS checks to see if this person already has an employment record in the system. If it found a record, it would fill in the Empl ID and Name at this point.</p> <p>Since it did not find a record of previous employment, those fields remain blank for now.</p>
10.	<p>Whenever you see a Find icon beside a field, you should click on the icon and select a value from the list.</p> <p>Click the Look up Company (Alt+5) button.</p> 
11.	<p>This list shows the companies that you are allowed to access. Select the appropriate company for the new hire.</p> <p>Click the 608 link.</p> 
12.	<p>Dates can be selected from a calendar by clicking the Date icon.</p> <p>Click the Choose a date (Alt+5) button.</p> 
13.	<p>This person will be hired as of March 11, 2015. Since the correct month and year are displayed, select the day.</p> <p>Click the 11 link.</p> 
14.	<p>Before you click Continue, double-check the National ID and Hire Date. Once they are saved, they create a permanent record and cannot be changed.</p> <p>Click the Continue button.</p> 

CAPPS HR/PAYROLL

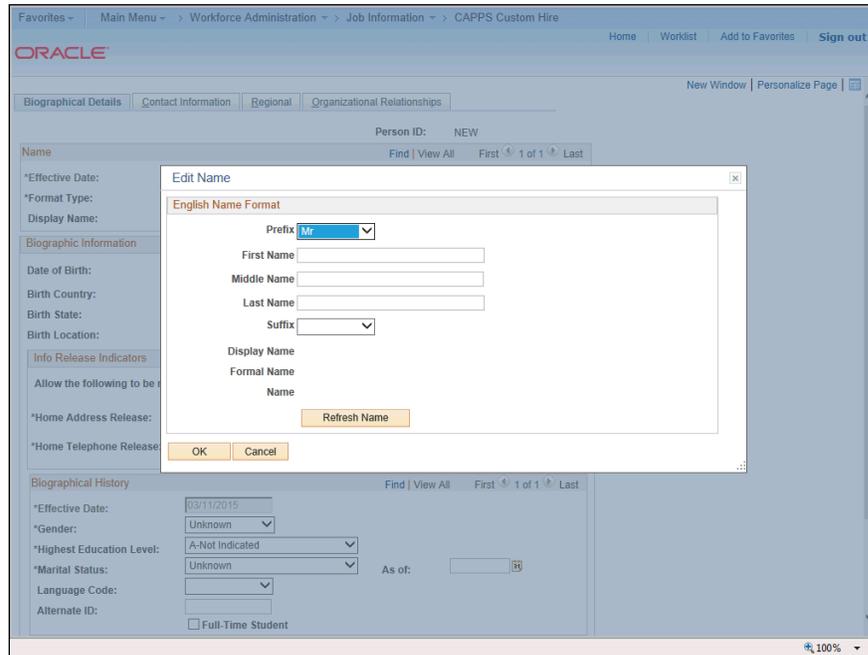
EUT Course



Step	Action
15.	<p>Notice that the Person ID (or Empl ID) has not been generated yet. CAPPS did not find a previous record for this National ID number.</p> <p>Since no previous record was found, your next task is to enter the required personal information about the new hire.</p>
16.	<p>Real names are not used in the training environment, so for this example, our new employee is Mr. Abcd Employee, Jr.</p> <p>Click the Add Name button.</p> <p>Add Name</p>
17.	<p>Prefix is optional, but will be used in this example.</p> <p>Open the Prefix dropdown list.</p> <p>Prefix <input type="text" value=""/></p>



Step	Action
18.	<p>Click the Mr list item.</p> <p>Mr</p>



Step	Action
19.	Click in the First Name field. First Name <input type="text"/>
20.	Enter the desired information into the First Name field. Enter " Abcd ". First Name <input type="text"/>
21.	Press [Tab] until you get to the Last Name field.
22.	Enter the desired information into the Last Name field. Enter " Employee ". Last Name <input type="text"/>
23.	Click the Suffix list. Suffix <input type="text"/>

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Oracle HR/Payroll interface showing the 'Edit Name' dialog box. The dialog is titled 'English Name Format' and contains the following fields:

- Prefix: Mr
- First Name: Abcd
- Middle Name: (empty)
- Last Name: Employee
- Suffix: III
- Display Name: Junior
- Formal Name: Senior

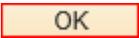
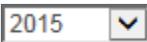
Buttons: Refresh Name, OK, Cancel.

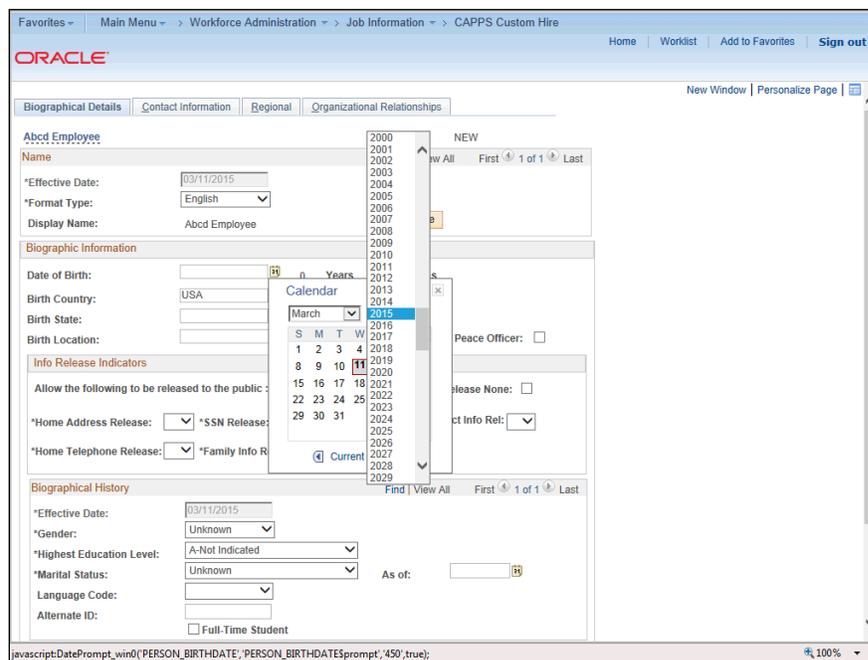
Step	Action
24.	Click the Junior list item. Junior

Oracle HR/Payroll interface showing the 'Edit Name' dialog box. The dialog is titled 'English Name Format' and contains the following fields:

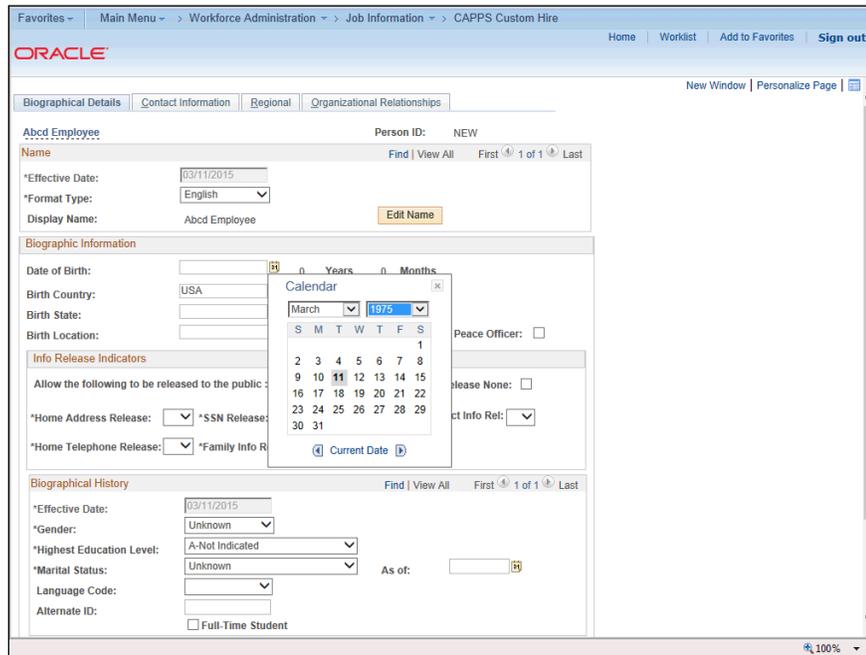
- Prefix: Mr
- First Name: Abcd
- Middle Name: (empty)
- Last Name: Employee
- Suffix: Junior
- Display Name: (empty)
- Formal Name: (empty)

Buttons: Refresh Name, OK, Cancel.

Step	Action
25.	Click the Refresh Name button to display the name as it will appear in CAPPS. 
26.	Tip: Before moving on, double check the spelling, and make sure the first and last names aren't reversed. (Mr. Employee will appreciate the courtesy.) Click the OK button. 
27.	Date of Birth can be selected from the calendar. Mr. Employee was born on March 11, 1975. Click the Choose a date (Alt+5) button. 
28.	The calendar will close when you click on the numbered date, so save that for last. Open the dropdown list for the year. 

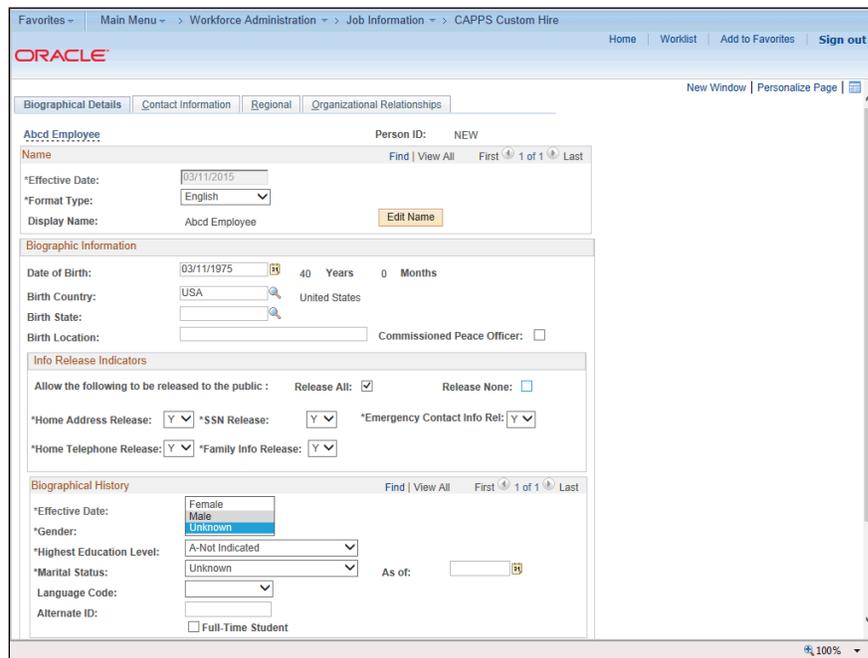


Step	Action
29.	Click the scrollbar to find the appropriate year.
30.	Select 1975 . <div style="border: 1px solid gray; background-color: #e0e0e0; padding: 2px; display: inline-block;">1975</div>



Step	Action
31.	Click the number 11 . <div style="border: 2px solid red; padding: 2px; display: inline-block; margin: 5px;">11</div>
32.	Note that the Date of Birth is now filled in. <p>The Birth Country defaults to USA, based on the National ID entered.</p> <p>Birth State and Location are not required.</p>
33.	If the employee is a Commissioned Peace Officer , check this box. <p>If the employee is a Commissioned Peace Officer, all of the Information Release Indicators will automatically be set to "No".</p> <p>In this example, Mr. Employee is not a Commissioned Peace Officer.</p>

Step	Action
34.	<p>Human Resources should set the Information Release Indicators to Release All. These can be changed individually in Employee Self Service if the employee chooses to do so.</p> <p>This is a required field.</p> <p>Click the Release All option.</p> <p>Release All: <input type="checkbox"/></p>
35.	<p>Gender is a required field.</p> <p>Click the Gender list.</p> <p>*Gender: <input type="text" value="Unknown"/></p>



The screenshot shows the Oracle HR/Payroll interface. The 'Info Release Indicators' section is expanded, showing 'Release All' checked and 'Release None' unchecked. Other indicators include 'Home Address Release', 'SSN Release', 'Emergency Contact Info Rel', 'Home Telephone Release', and 'Family Info Release'. The 'Biographic History' section shows 'Gender' set to 'Unknown'.

Step	Action
36.	<p>Select Male.</p> <p>Male</p>

[Favorites](#) | [Main Menu](#) | [Workforce Administration](#) | [Job Information](#) | [CAPPS Custom Hire](#)
Home | Worklist | Add to Favorites | Sign out

ORACLE
New Window | Personalize Page |

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Abcd Employee Person ID: NEW

Name Find | View All | First 1 of 1 Last

*Effective Date: 03/11/2015
 *Format Type: English
 Display Name: Abcd Employee [Edit Name](#)

Biographic Information

Date of Birth: 03/11/1975 40 Years 0 Months
 Birth Country: USA United States
 Birth State:
 Birth Location: Commissioned Peace Officer:

Info Release Indicators

Allow the following to be released to the public: Release All: Release None:

*Home Address Release: *SN Release: *Emergency Contact Info Rel:
 *Home Telephone Release: *Family Info Release:

Biographical History Find | View All | First 1 of 1 Last

*Effective Date: 03/11/2015
 *Gender: Male
 *Highest Education Level: A-Not Indicated
 *Marital Status: Unknown As of:
 Language Code:
 Alternate ID: Full-Time Student

100%

Step	Action
37.	<p>Highest Education Level defaults to A-Not Indicated, which is sufficient for this required field if education level is not known.</p> <p>Click the Highest Education Level list.</p> <p>*Highest Education Level: A-Not Indicated</p>

Oracle HR/Payroll System Screenshot 1

Navigation: Favorites - Main Menu - Workforce Administration - Job Information - CAPPS Custom Hire

Page: Home | Worklist | Add to Favorites | Sign out

Biographical Details | Contact Information | Regional | Organizational Relationships

Abcd Employee Person ID: NEW

Name: Abcd Employee Find | View All First 1 of 1 Last

*Effective Date: 03/11/2015

*Format Type: English

Display Name: Abcd Employee Edit Name

Biographic Information

Date of Birth: 03/11/1975 40 Years 0 Months

Birth Country: USA United States

Birth State:

Birth Location: Commissioned Peace Officer:

Info Release Indicators

Allow the following to be released to the public: Release All: Release None:

*Home Address Release: *SSN Release: *Emergency Contact Info Rel:

*Home Telephone Release: *Family Info Release:

Biographical History

A-Not Indicated

*Effective Date:

*Gender:

*Highest Education Level: F-2-Year College Degree

*Marital Status:

Language Code:

Alternate ID:

As of:

100%

Step	Action
38.	Mr. Employee has a 2-Year College Degree . F-2-Year College Degree

Oracle HR/Payroll System Screenshot 2

Navigation: Favorites - Main Menu - Workforce Administration - Job Information - CAPPS Custom Hire

Page: Home | Worklist | Add to Favorites | Sign out

Biographical Details | Contact Information | Regional | Organizational Relationships

Abcd Employee Person ID: NEW

Name: Abcd Employee Find | View All First 1 of 1 Last

*Effective Date: 03/11/2015

*Format Type: English

Display Name: Abcd Employee Edit Name

Biographic Information

Date of Birth: 03/11/1975 40 Years 0 Months

Birth Country: USA United States

Birth State:

Birth Location: Commissioned Peace Officer:

Info Release Indicators

Allow the following to be released to the public: Release All: Release None:

*Home Address Release: *SSN Release: *Emergency Contact Info Rel:

*Home Telephone Release: *Family Info Release:

Biographical History

*Effective Date: 03/11/2015

*Gender: Male

*Highest Education Level: F-2-Year College Degree

*Marital Status: Unknown

Language Code:

Alternate ID:

As of:

Full-Time Student

100%

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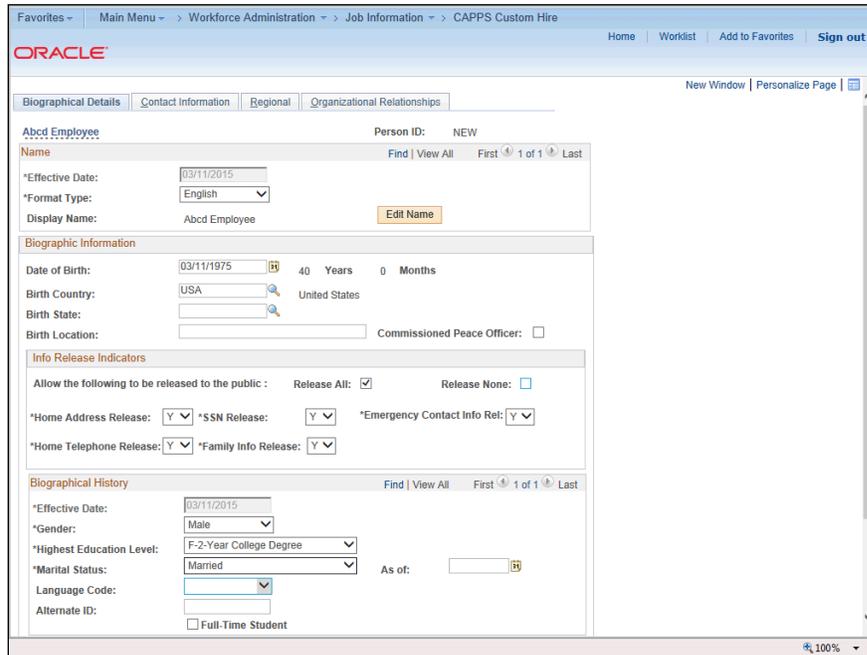


Step	Action
39.	Click the Marital Status list. *Marital Status: Unknown ▼

Oracle HR System Screenshot:

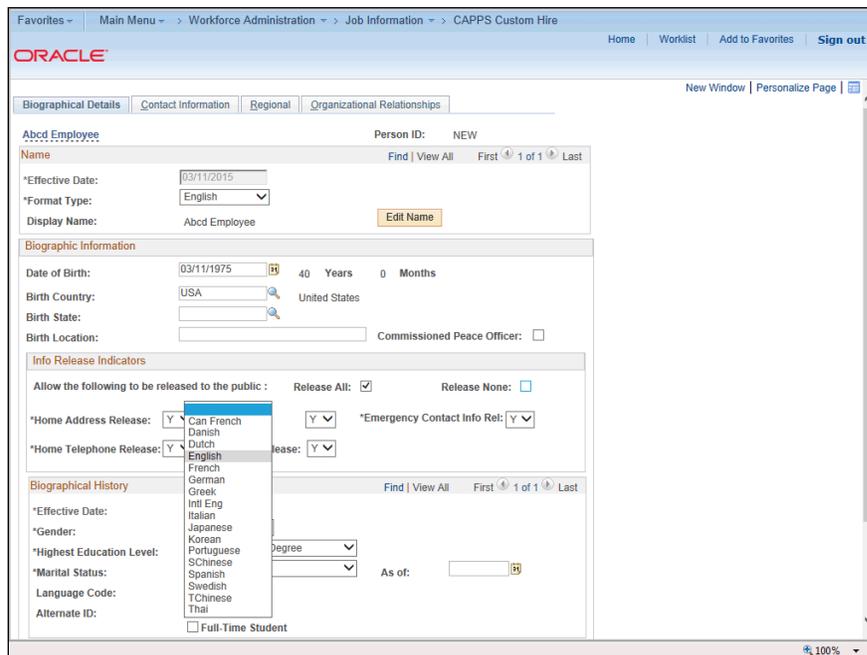
- Navigation: Favorites > Main Menu > Workforce Administration > Job Information > CAPPS Custom Hire
- Page: Home | Worklist | Add to Favorites | Sign out
- Section: Biographical Details | Contact Information | Regional | Organizational Relationships
- Employee: Abcd Employee | Person ID: NEW
- Name: Abcd Employee | Edit Name
- Biographic Information:
 - Date of Birth: 03/11/1975 | 40 Years 0 Months
 - Birth Country: USA | United States
 - Birth State: []
 - Birth Location: [] | Commissioned Peace Officer:
- Info Release Indicators:
 - Allow the following to be released to the public: Release All: Release None:
 - *Home Address Release: *SSN Release: *Emergency Contact Info Rel:
 - *Home Telephone Release: *Family Info Release:
- Biographical History:
 - *Effective Date: []
 - *Gender: []
 - *Highest Education Level: []
 - *Marital Status: **Unknown** (dropdown menu open showing: Common-Law, Divorced, Head of Household, Married, Separated, Single, Unknown, Widowed) | As of: []
 - Language Code: []
 - Alternate ID: []
 - Full-Time Student

Step	Action
40.	Mr. Employee is Married . Married



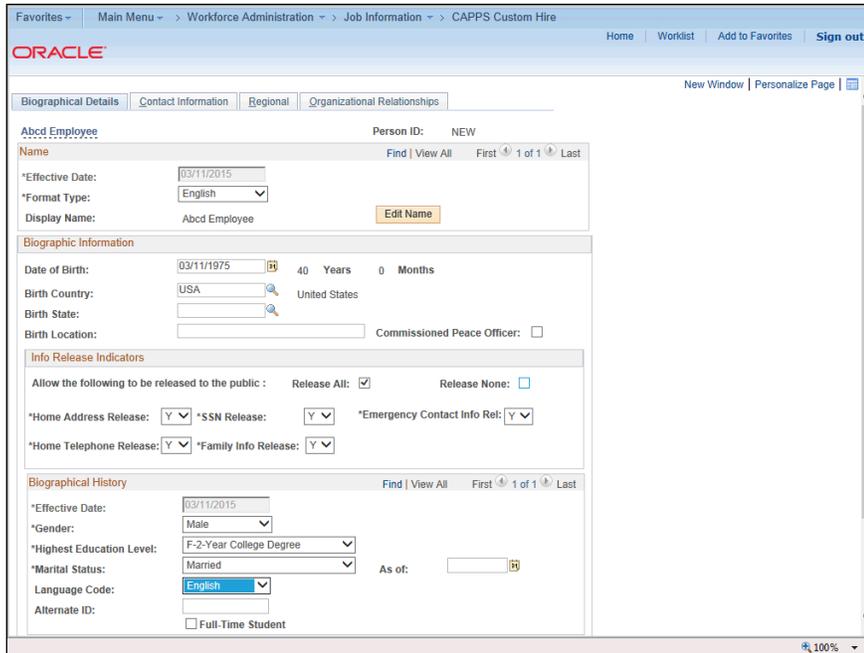
The screenshot shows the Oracle HR/PAYROLL interface for a new hire. The employee's name is 'Abcd Employee' and their Person ID is 'NEW'. The 'Biographical Information' section includes fields for Date of Birth (03/11/1975), Birth Country (USA), and Birth State. The 'Info Release Indicators' section has several checkboxes for releasing information to the public, with 'Release All' checked. The 'Biographical History' section includes fields for Effective Date (03/11/2015), Gender (Male), Highest Education Level (F-2-Year College Degree), and Marital Status (Married). A 'Language Code' dropdown menu is visible, currently showing 'English'.

Step	Action
41.	Click the Language Code list. Language Code: <input data-bbox="782 1094 992 1136" type="text"/>



This screenshot is identical to the previous one, but the 'Language Code' dropdown menu is open, displaying a list of language options: Can French, Danish, Dutch, English, French, German, Greek, Intl Eng, Italian, Japanese, Korean, Portuguese, SChinese, Spanish, Swedish, TChinese, and Thai. The 'English' option is currently selected.

Step	Action
42.	Mr. Employee speaks English . 



Step	Action
43.	Scroll down to see the rest of the page. Click the scrollbar.
44.	National ID, at the bottom of the page, has been filled in from the previous screen, and cannot be edited. Double-check to make sure that the ID number is correct before moving on, then click the scroll bar to return to the top of the page. Click the scrollbar.
45.	Click the Contact Information tab. 

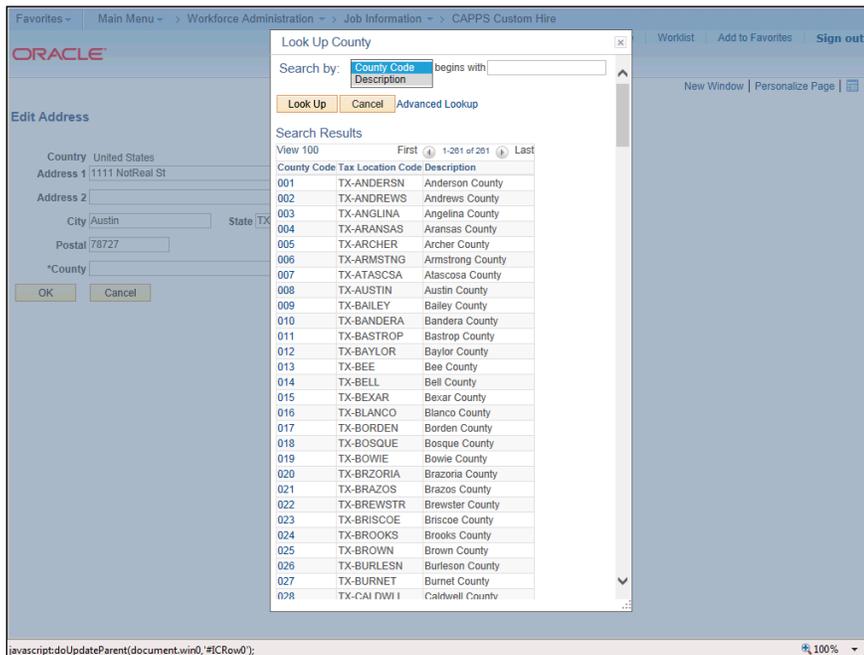
Step	Action
46.	<p>The Contact Information tab holds Address, Phone, and Email information.</p> <p>Click the Add Address Detail link.</p> <p>Add Address Detail</p>
47.	<p>Click the Add Address link.</p> <p>Add Address</p>
48.	<p>Enter Mr. Employee's address into the Address 1 field.</p> <p>Enter "1111 NotReal St".</p> <p>Address 1 <input data-bbox="532 737 1377 772" type="text"/></p>
49.	<p>Click in the City field.</p> <p>City <input data-bbox="488 831 777 867" type="text"/></p>
50.	<p>Mr. Employee lives in Austin, so that goes into the City field.</p> <p>Enter "Austin".</p> <p>City <input data-bbox="488 997 777 1033" type="text"/></p>
51.	<p>Click in the State field.</p> <p>State <input data-bbox="500 1096 610 1131" type="text"/></p>
52.	<p>Texas goes in the State field.</p> <p>Enter "TX".</p> <p>State <input data-bbox="500 1264 610 1299" type="text"/></p>
53.	<p>Click in the Postal field.</p> <p>Postal <input data-bbox="511 1362 706 1398" type="text"/></p>
54.	<p>Mr. Employee's Zip code goes in the Postal field.</p> <p>Enter "78727".</p> <p>Postal <input data-bbox="511 1530 706 1566" type="text"/></p>
55.	<p>Use the Lookup icon to find the County code.</p> <p>Click the Look up County (Alt+5) button.</p> <p></p>

CAPPS HR/PAYROLL

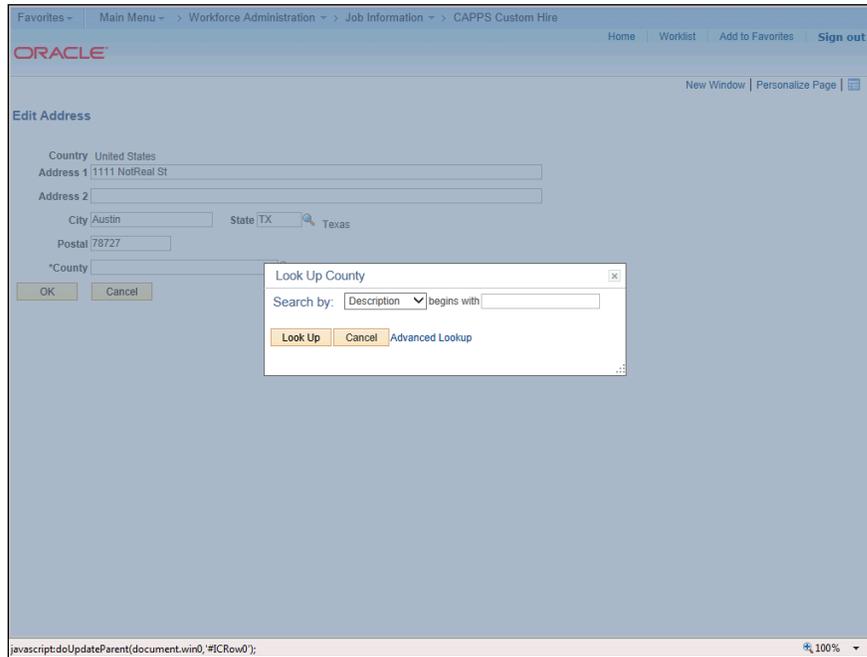
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Step	Action
56.	<p>You could scroll through this list, but Travis is way down near the bottom. Change the Search By to Description so that you can search.</p> <p>Click the Search by list.</p> <p>Search by: County Code ▼</p>

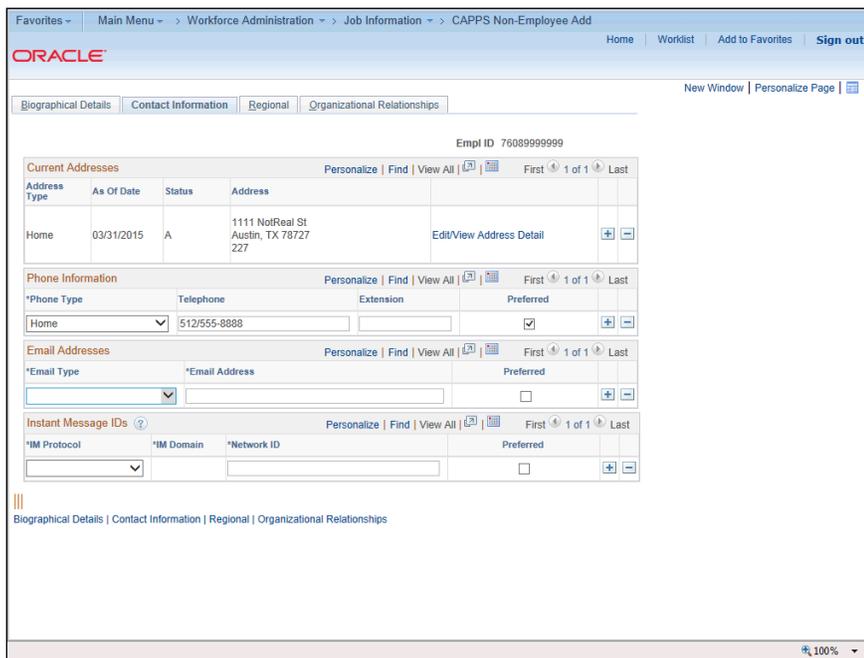


Step	Action
57.	<p>Click the Description list item.</p> <p>Description</p>



Step	Action
58.	We're searching for Travis County, so enter " Travis " in the begins with field. begins with <input type="text"/>
59.	Click the Look Up button. <input type="button" value="Look Up"/>
60.	The County Code for Travis is 227. Click the Travis County link. <input type="button" value="Travis County"/>
61.	Mr. Employee's address is complete. Click the OK button. <input type="button" value="OK"/>
62.	The address you just entered displays in the Address History field. Click the OK button. <input type="button" value="OK"/>

Step	Action
63.	Now enter Mr. Employee's home phone number. Click the Phone Type list. 
64.	Click in the Telephone field. 
65.	Mr. Employee's Telephone number is " 5125558888 ".
66.	Click the Preferred option. <input type="checkbox"/>



Oracle HR/Payroll System - Contact Information for Employee Add

Empl ID: 7608999999

Phone Information

*Phone Type	Telephone	Extension	Preferred
Home	512/555-8888		<input checked="" type="checkbox"/>

Step	Action
67.	Open the Email Type dropdown menu. 

[Favorites](#) | [Main Menu](#) | [Workforce Administration](#) | [Job Information](#) | [CAPPS Non-Employee Add](#)

[Home](#) | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

ORACLE

Biographical Details | **Contact Information** | Regional | Organizational Relationships

Empl ID 7608999999

[Personalize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

Address Type	As Of Date	Status	Address	
Home	03/31/2015	A	1111 NotReal St Austin, TX 78727 227	Edit/View Address Detail + -

[Personalize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

*Phone Type	Telephone	Extension	Preferred	
Home	512/555-8888		<input checked="" type="checkbox"/>	+ -

[Personalize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

*Email Type	*Email Address	Preferred	
Business		<input type="checkbox"/>	+ -
Home		<input type="checkbox"/>	+ -
Other		<input type="checkbox"/>	+ -

[Personalize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

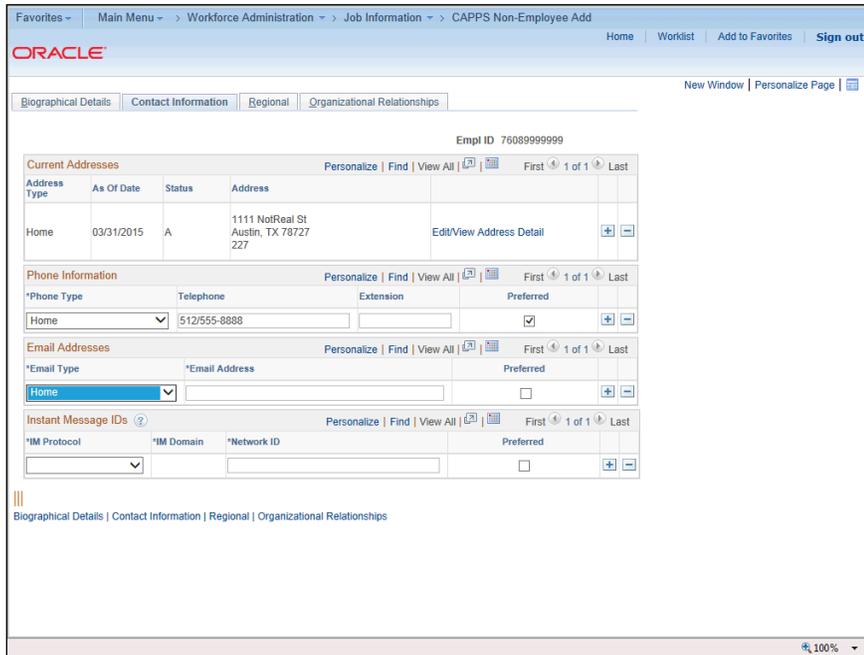
*IM Protocol	*IM Domain	*Network ID	Preferred	
			<input type="checkbox"/>	+ -

[Personalize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

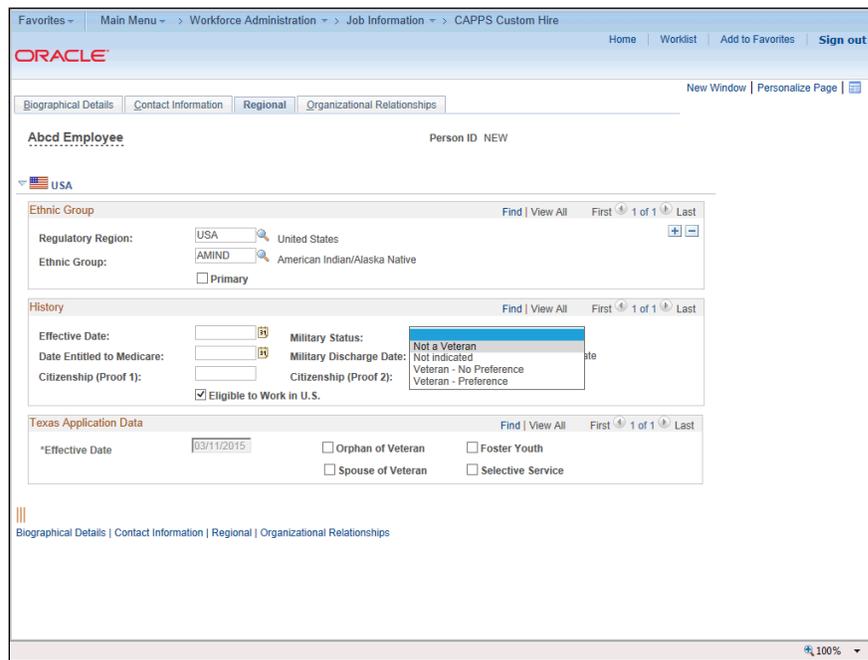
100%

Step	Action
68.	<p>Select the email type.</p> <p>Business email will be entered by an automated process after hiring is complete. However, if the employee chooses to have a Home address on file, it can be added at this time.</p> <p>Click the Home list item.</p> <p>Home</p>



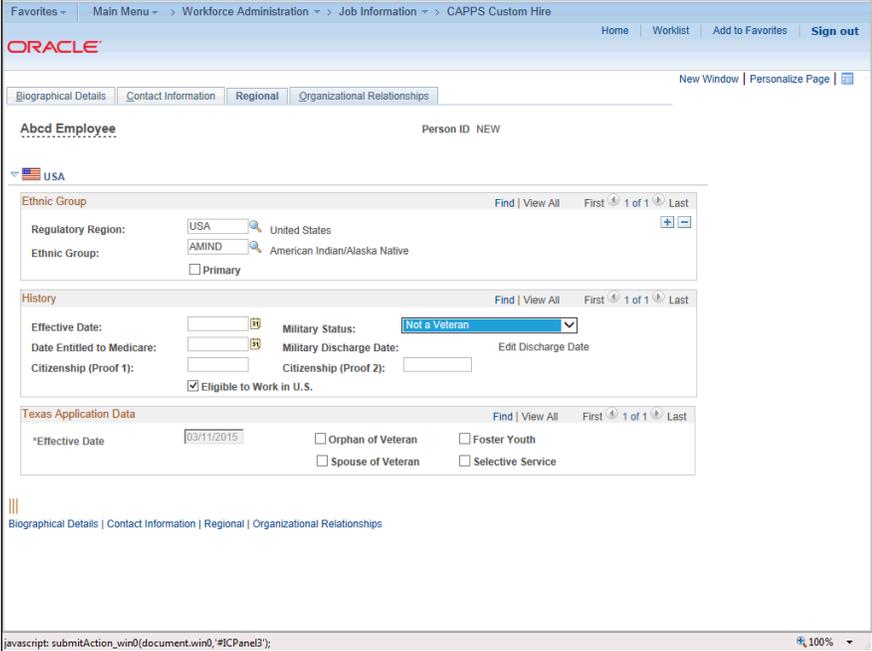
Step	Action
69.	Click in the Email Address field. <input type="text"/>
70.	Enter " home@email.com " into the Email Address field.
71.	Click the Preferred option. <input type="checkbox"/>
72.	Important note: When you click in the Email Type field, the system opens a row in the database in which you will enter the email address. However, if you click in the Email Type field and then do NOT enter an address, that row is left behind, but empty. If you should happen to click in the field and then NOT enter a valid email address, you must click the minus sign to delete the empty row before proceeding.
73.	Click the Regional tab. <input type="button" value="Regional"/>
74.	The Regional tab holds information related to Ethnicity, Citizenship, Military Status, etc.

Step	Action
75.	Ethnic Group is a required field. Click the Look up Ethnic Group (Alt+5) button. 
76.	Mr. Employee is an American Indian. Click the AMIND link. 
77.	Click the Military Status list. Military Status: 

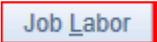


The screenshot shows the Oracle HR/Payroll interface for an employee named 'Abcd Employee'. The 'Regional' tab is active, displaying the 'Ethnic Group' section with 'USA' selected for the Regulatory Region and 'AMIND' (American Indian/Alaska Native) selected for the Ethnic Group. The 'History' section shows the 'Military Status' dropdown menu open, with 'Not a Veteran' selected. Other fields include 'Effective Date', 'Date Entitled to Medicare', 'Citizenship (Proof 1)', 'Citizenship (Proof 2)', and 'Texas Application Data'.

Step	Action
78.	Mr. Employee is Not a Veteran . 



Step	Action
79.	Click the Organizational Relationships tab. 
80.	Notice that your Organizational Relationship is already selected, based on your use of the CAPPS Custom Hire function. This selection cannot be changed on this page.
81.	Notice, also, that the Person ID still says "NEW". An Empl ID has not yet been issued.
82.	Do NOT proceed to the next step unless you have double-checked that your National ID and Hire Date are correct. The Personal Data record will be saved in the next step, creating a permanent record for that ID number and hire date.
83.	Click the Add Relationship button to save the record and generate the Empl ID. 
84.	The Empl ID number now appears, and the employee record has been saved. Next we will enter the position for the new employee, and complete the Job Data screens.

Step	Action
85.	<p>Notice that the Effective Date and Action code are already entered, and cannot be changed. Both of these values came from the CAPPS Custom Hire page.</p> <p>Click the Look up Reason Code icon.</p> 
86.	<p>Notice the Reason Codes that are listed when "Hire" is selected in the Action field. The Reason Codes in CAPPS are the same as they were previously.</p> <p>For this example we will choose "010 - New Hire or Rehire", but if this employee is being transferred you could use 012 or LEG instead.</p> <p>Click the 010 link.</p> 
87.	<p>The Position record has been set up in advance, and contains most of the information the system needs about Mr. Employee's new job.</p> <p>Click in the Position Number field.</p> <p>Position Number: <input data-bbox="764 999 951 1041" type="text"/></p>
88.	<p>Mr. Employee has been hired as a Director in the Motor Carrier division of the DMV.</p> <p>Enter his Position Number, which is "00002295".</p> <p>Position Number: <input data-bbox="764 1209 951 1251" type="text"/></p>
89.	<p>When you press the tab key, the system will verify the position number and import position information into various fields.</p> <p>Press [Tab].</p>
90.	<p>Notice that the Position information automatically populates.</p>
91.	<p>Click the Job Information tab.</p> 
92.	<p>Verify that the Job Information has populated correctly, including description, Supervisor level, and standard hours.</p>
93.	<p>Then move on to the Job Labor tab.</p> 
94.	<p>These fields are not currently being used.</p>

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Step	Action
95.	Click the Payroll tab. 
96.	Verify that the correct Pay Group has been selected, or select the appropriate value if your Agency has more than one option. Verify that Employee Type is selected.
97.	Click the Salary Plan tab. 
98.	The Salary Plan and Grade also come from the Position record. Verify that they are correct.
99.	Click the Compensation tab. 
100.	The actual rate of Mr. Employee's compensation must be entered manually. Comp Rate is always entered on a Monthly basis. Click in the Comp Rate field. <input data-bbox="344 1083 610 1119" type="text"/>
101.	Mr. Employee will be paid \$10,000.00 per month. Enter " 10000 " in the Comp Rate field.
102.	Click the Calculate Compensation button. 
103.	The calculated compensation rate is now displayed. Click the OK button. 
104.	The system returns you to the Organizational Relationship screen. The initial hiring process is complete. Note: At this point the hire is now saved. Any changes to Personal or Job Data must be made in the applicable core Data Pages. Do not try to rehire to make data changes.
105.	Congratulations! You have successfully completed this lesson. End of Procedure.

Creating a Contingent Worker and Assigning a Position

Section 1 Exercises, Lesson 2: Creating a Contingent Worker and Assigning a Position

Use the CAPPS Non-Employee Add page to set up a new contingent worker, add an Organizational Relationship, and assign a position.

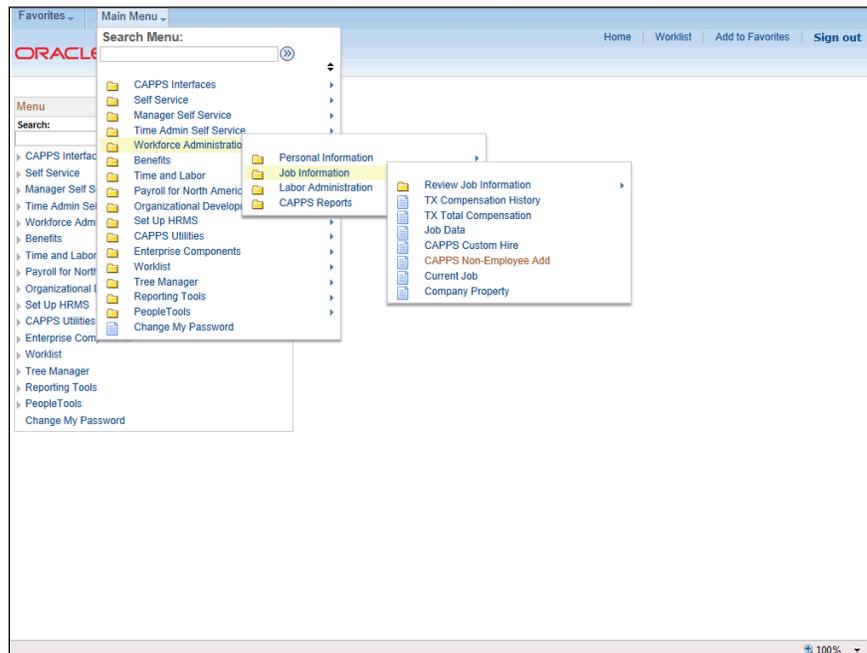
The Job Code for a Contingent Worker is always the same: NonEmp. The Position Number will be different each time, and will contain Reports To manager, location, Agency, and other information. Headcount for a Contingent Worker position can be more than one.

Note: Do not enter a National ID number for a contingent worker. The CAPPS Non-Employee Add page asks for an Empl ID number instead. If the contingent worker has not previously been an employee, they must have a TINS number issued prior to being set up in CAPPS. The TINS number is a Texas Identification Number that is issued by the Comptroller to anyone wishing to do business with the State of Texas. The TINS number should be used as the Empl ID for contingent workers.

Procedure

In this exercise, you will use the CAPPS Non-Employee Add page to create a Contingent Worker in the system and add an Organizational Relationship.

Then you will use the Job Data page to assign a Position.



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Step	Action
1.	<p>Begin by navigating to the CAPPS Non-Employee Add page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > CAPPS Non-Employee Add.</p> <p></p>
2.	<p>Note that this screen asks for Empl ID instead of National ID. The Empl ID is the TINS number, obtained for the contingent worker prior to being hired.</p> <p>TINS numbers are also referred to as "7-numbers" because they usually start with a seven. In the training environment, these numbers will not start with a seven for confidentiality purposes.</p> <p>Enter the TINS number into the Empl ID field. For this example, enter "09000876353".</p> <p>*Empl ID <input data-bbox="516 867 695 905" type="text"/></p>
3.	<p>Click the Look up Company (Alt+5) button.</p> <p></p>
4.	<p>Select your Agency's Company code from the list.</p> <p>Click the 608 link.</p> <p></p>
5.	<p>Open the calendar to select the effective date of the hire.</p> <p>Click the Calendar icon.</p> <p></p>
6.	<p>The effective date for this hire is March 11, 2015.</p> <p>Click the 11 link.</p> <p></p>
7.	<p>Be sure that you double-check your Empl ID and Effective Date of hire before proceeding.</p> <p>When this record is saved in a later step, a permanent record will be created, and the Empl ID and Hire Date cannot be changed after that.</p> <p>Click the Continue button.</p> <p></p>

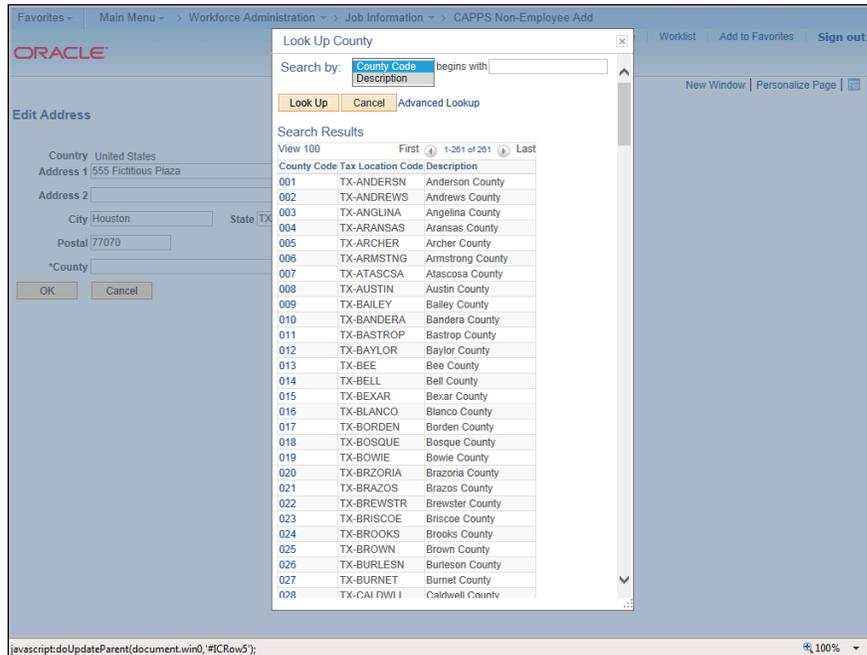
Step	Action
8.	<p>All of the personal information about an employee is set up in this screen. Notice the four tabs:</p> <ul style="list-style-type: none"> - Biographical Details - Contact Information - Regional - Organizational Relationships. <p>Each of these tabs can be used to track information about the worker. However, the only required fields for a Contingent Worker are Name and Address.</p>
9.	<p>The TINS number that you entered previously is displayed here.</p> <p>If this person existed in CAPPS previously, some information may automatically populate. This information should be validated in case it is out of date.</p>
10.	<p>Begin setting up Biographical Details by entering the name.</p> <p>Click the Add Name button.</p> <p>Add Name</p>
11.	<p>You can use the tab key to move from field to field, or you can click on them with your mouse.</p> <p>Click in the First Name field.</p> <p>First Name <input type="text"/></p>
12.	<p>Because this is a training database, we do not use real names in our simulations. So our Contingent worker's name is Test Contingent.</p> <p>Enter "Test" into the First Name field.</p> <p>First Name <input type="text"/></p>
13.	<p>Click in the Last Name field.</p> <p>Last Name <input type="text"/></p>
14.	<p>Enter "Contingent" into the Last Name field.</p> <p>Last Name <input type="text"/></p>
15.	<p>Click the Refresh Name button to see how the name will be displayed.</p> <p>Refresh Name</p>
16.	<p>Click the OK button.</p> <p>OK</p>
17.	<p>Notice that the name is displayed at the top of the screen, and in the Display Name field.</p>

CAPPS HR/PAYROLL

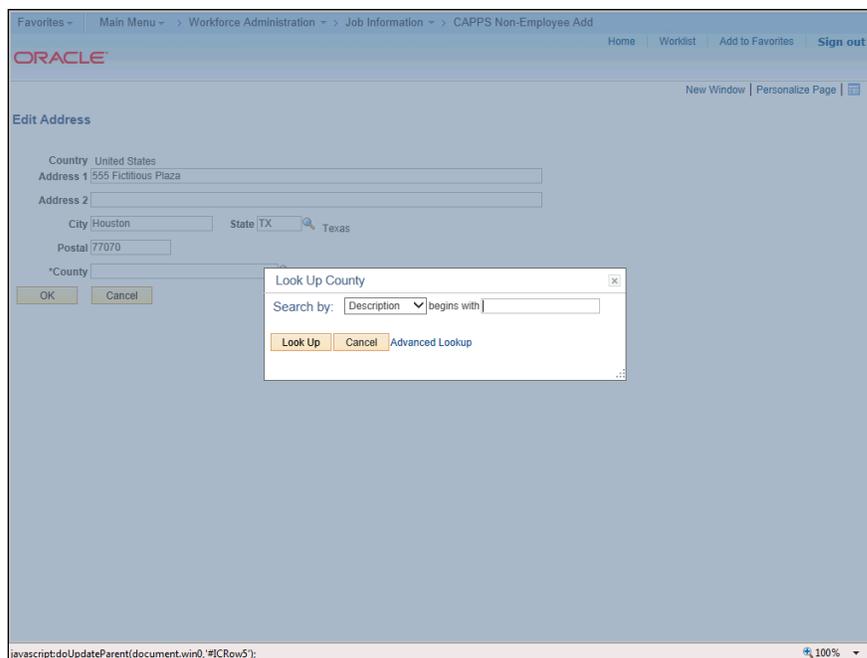
EUT Course



Step	Action
18.	Other biographical details, such as Date of Birth , are optional for Contingent workers. The only required fields are Name and Address . Agencies may use the remaining fields as needed.
19.	Scroll down to see the rest of the screen. Click the scrollbar.
20.	Notice that for a contingent worker, the National ID field is blank at this point. Once the Personal Data is saved, the National ID will default to 999-99-9999.
21.	Click the scrollbar to scroll back to the top of the screen.
22.	Next we will enter the address. Click the Contact Information tab. 
23.	Click the Add Address Detail link. 
24.	If the country is blank, fill it in. Then click the Add Address link. 
25.	Enter the contingent worker's address into the Address 1 field. Address 2 may also be entered as needed.. Enter " 555 Fictitious Plaza ". Address 1 
26.	Enter " Houston " into the City field. City 
27.	Enter " TX " into the State field. State 
28.	Enter " 77070 " into the Postal field. Postal 
29.	Click the Look up County button. 
30.	Click the Search by list. Search by: 



Step	Action
31.	Change County Code to Description . <div style="border: 1px solid black; padding: 2px; display: inline-block;">Description</div>

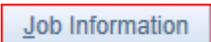
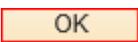


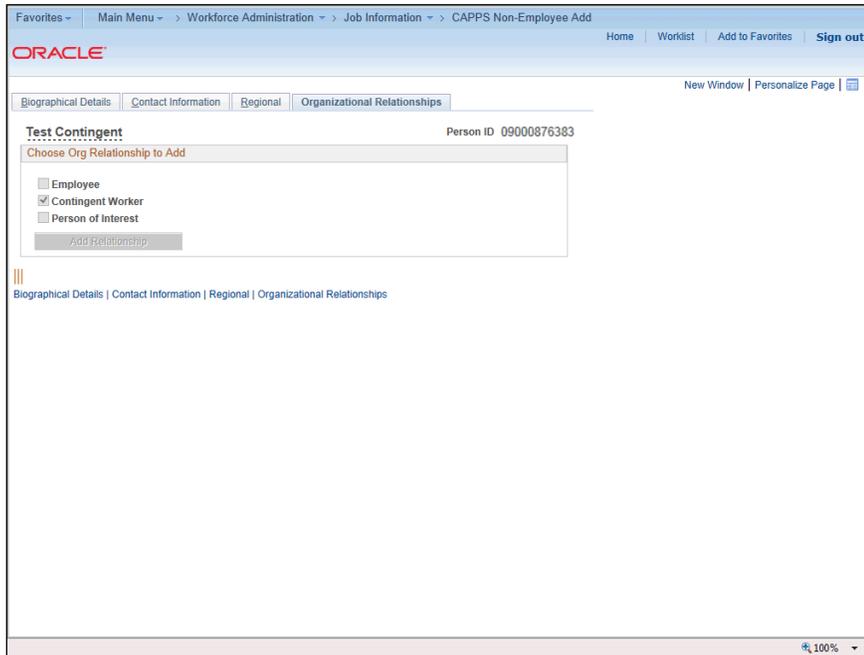
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Step	Action
32.	Enter " Harris " into the begins with field. begins with <input type="text"/>
33.	Click the Look Up button. <input type="button" value="Look Up"/>
34.	Click the Harris County link. <input type="button" value="Harris County"/>
35.	Click the OK button. <input type="button" value="OK"/>
36.	Review the address for accuracy, and then click the OK button. <input type="button" value="OK"/>
37.	As mentioned previously, Phone and Email are optional, and can be used at the Agency's discretion.
38.	Click the Organizational Relationships tab. <input type="button" value="Organizational Relationships"/>
39.	Notice that Contingent Worker is pre-selected, and cannot be changed. The CAPPS Non-Employee Add page that you are using is only used for Contingent Workers.
40.	Do NOT proceed to the next step unless you have double-checked that your Empl ID and Hire Date are correct. The Personal Data record will be saved in the next step, creating a permanent record for that ID number and hire date.
41.	Click the Add Relationship button to save your work so far, and move on to the Job Data screens. <input type="button" value="Add Relationship"/>
42.	Notice that the Action/Reason code is already filled in for you, and that there are only two tabs at the top of the screen: Work Location and Job Information .
43.	Click in the Position Number field. Position Number: <input type="text"/>
44.	Enter the position number " 00002296 " into the Position Number field. Position Number: <input type="text"/>

Step	Action
45.	<p>When you enter the Position Number and press the Tab key, the rest of the information about the job should auto-populate.</p> <p>Press [Tab].</p>
46.	<p>Position Description, Company, Business Unit, and other fields have just populated.</p> <p>Note: The Job Code for a Contingent Worker is always the same, although the Position Number will be different each time it is used. Headcount for a Contingent Worker position can be more than one.</p> <p>Agencies may choose to have a single Position for all of their Contingent Workers, or have separate Position Numbers for different groups of Non-Employees. However, in CAPPS they will all have the same Description, "Non Employee".</p>
47.	<p>Click the Job Information tab.</p> 
48.	<p>As mentioned previously, the Job Code for Contingent Workers is always the same: NONEMP.</p> <p>Verify that the Job Information is correct.</p>
49.	<p>Click the scrollbar.</p>
50.	<p>If everything is correct, click the OK button to save your work.</p> 
51.	<p>Tip: Have you noticed the pinwheel yet? When your computer is processing, this pinwheel will spin.</p> <p>Anytime your screen appears to freeze, look for the pinwheel. Always wait for the pinwheel to stop spinning before you do anything else. Sometimes it might take a while, but if you continue clicking you may trigger something unexpected or freeze up your computer.</p>



Step	Action
52.	When processing is complete, you will be returned to the Organizational Relationships tab. Press Enter to continue.
53.	Congratulations! You have successfully completed this lesson. End of Procedure.

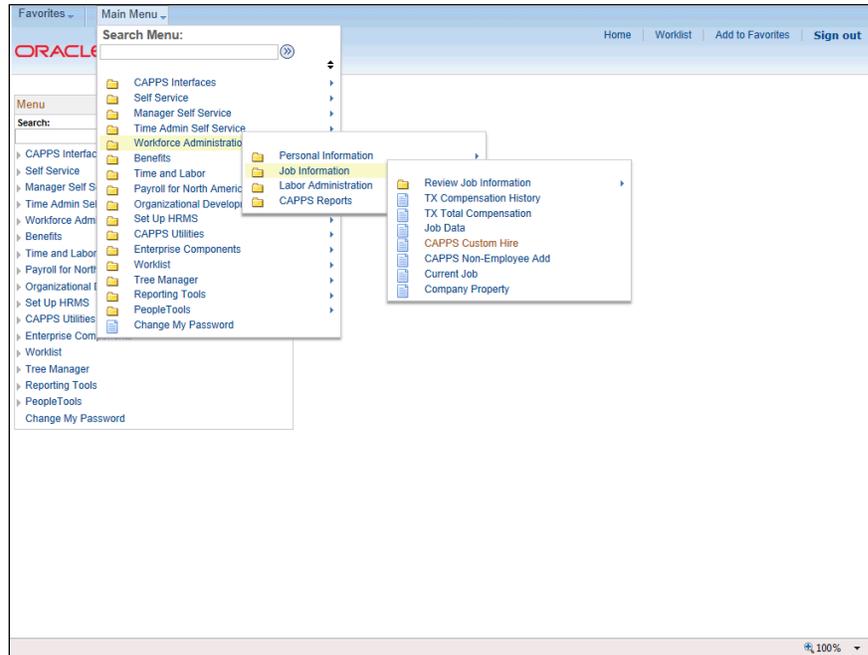
Rehires and Return-to-Work Retirees

Procedure

In this exercise, you will use the CAPPS Custom Hire page to rehire a Return-to-Work Retiree.

Then you will use the Job Data page to assign a Position.

Step	Action
1.	In this exercise, you will use the CAPPS Custom Hire page to rehire a Return-to-Work Retiree. Then you will use the Job Data page to assign a Position.



Step	Action
2.	<p>Begin by navigating to the CAPPS Custom Hire page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > CAPPS Custom Hire.</p> 
3.	<p>Enter the Social Security number into the National ID field.</p> <p>Enter "608990220", and then press the Tab key.</p> 
4.	<p>CAPPS recognized this National ID number right away and filled in the Empl ID and the Name.</p>
5.	<p>Enter your Agency number into the Company field.</p> <p>Enter "608".</p> 
6.	<p>Click the Choose a date button.</p> 
7.	<p>Click the list for the Month.</p> 

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Favorites ▾ Main Menu ▾ Workforce Administration ▾ Job Information ▾ CAPPS Custom Hire Home | Worklist | Add to Favorites | Sign out

ORACLE New Window | Personalize Page |

CAPPS Custom Hire

National ID Empl ID 00034255831
 *Company Name Work_Return To
 *Hire Date Empl Record 0

January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

javascript:DatePrompt_win0('TX_CAPPS_HR_WRK_HIRE_DT','TX_CAPPS_HR_WRK_HIRE_DT\$prompt','450',true);
100%

Step	Action
8.	Select April . <div style="border: 1px solid gray; background-color: #cccccc; padding: 2px; display: inline-block; margin-top: 5px;">April</div>

Favorites ▾ Main Menu ▾ Workforce Administration ▾ Job Information ▾ CAPPS Custom Hire Home | Worklist | Add to Favorites | Sign out

ORACLE New Window | Personalize Page |

CAPPS Custom Hire

National ID Empl ID 00034255831
 *Company Name Work_Return To
 *Hire Date Empl Record 0

April						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

javascript:DatePrompt_win0('TX_CAPPS_HR_WRK_HIRE_DT','TX_CAPPS_HR_WRK_HIRE_DT\$prompt','450',true);
100%

Step	Action
9.	Click the 1 link. 
10.	Click the Continue button. 
11.	Verify that this is the correct Empl ID. Click the OK button. 
12.	The Information Release Indicator is a required field. Human Resources should always select Release All . The employee can update these settings in Employee Self Service . Select the Release All option. 
13.	If any of the information on the Biographical Details tab needs to be updated, do so now. Then click the Contact Information tab. 
14.	Update address, phone, and email information as needed. Click the Add a new row button. 
15.	Click the Phone Type list. 

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Home | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

ORACLE
New Window | [Personalize Page](#) | [...](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Return Work Empl ID 00034255831

Current Addresses [Personalize](#) | [Find](#) | [View All](#) | [...](#) | First 1 of 1 | Last

Address Type	As Of Date	Status	Address	
Home	03/30/2015	A	133 Made Up Street AUSTIN, TX 78745 227	Edit/View Address Detail + -

Phone Information [Personalize](#) | [Find](#) | [View All](#) | [...](#) | First 1-2 of 2 | Last

*Phone Type	Telephone	Extension	Preferred	
Home	999/999-9999		<input checked="" type="checkbox"/>	+ -
Business			<input type="checkbox"/>	+ -
Business Cell			<input type="checkbox"/>	+ -
FAX			<input type="checkbox"/>	+ -
Home			<input type="checkbox"/>	+ -
Other			<input type="checkbox"/>	+ -
Pager 1			<input type="checkbox"/>	+ -
Personal Cell			<input type="checkbox"/>	+ -

Email Addresses [Personalize](#) | [Find](#) | [View All](#) | [...](#) | First 1 of 1 | Last

*Email Type	*Email Address	Preferred	
Home	home@email.com	<input checked="" type="checkbox"/>	+ -

Instant Message IDs [Personalize](#) | [Find](#) | [View All](#) | [...](#) | First 1 of 1 | Last

*IM Protocol	*IM Domain	*Network ID	Preferred	
			<input type="checkbox"/>	+ -

||| [Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

100%

Step	Action
16.	Click the Personal Cell list item. <div style="border: 1px solid gray; background-color: #cccccc; padding: 2px; display: inline-block; margin-top: 5px;">Personal Cell</div>

[Favorites](#) > [Main Menu](#) > [Workforce Administration](#) > [Job Information](#) > [CAPPS Custom Hire](#)
Home | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

ORACLE
New Window | [Personalize Page](#) | [...](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Return Work Empl ID 00034255831

Current Addresses [Personalize](#) | [Find](#) | [View All](#) | [...](#) | First 1 of 1 | Last

Address Type	As Of Date	Status	Address	
Home	03/30/2015	A	133 Made Up Street AUSTIN, TX 78745 227	Edit/View Address Detail + -

Phone Information [Personalize](#) | [Find](#) | [View All](#) | [...](#) | First 1-2 of 2 | Last

*Phone Type	Telephone	Extension	Preferred	
Home	999/999-9999		<input checked="" type="checkbox"/>	+ -
Personal Cell			<input type="checkbox"/>	+ -

Email Addresses [Personalize](#) | [Find](#) | [View All](#) | [...](#) | First 1 of 1 | Last

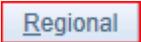
*Email Type	*Email Address	Preferred	
Home	home@email.com	<input checked="" type="checkbox"/>	+ -

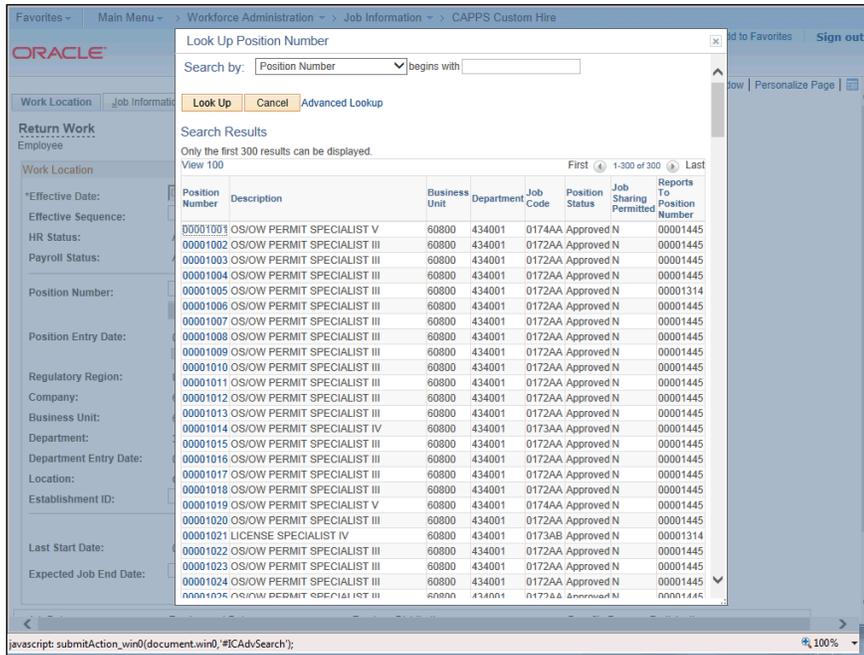
Instant Message IDs [Personalize](#) | [Find](#) | [View All](#) | [...](#) | First 1 of 1 | Last

*IM Protocol	*IM Domain	*Network ID	Preferred	
			<input type="checkbox"/>	+ -

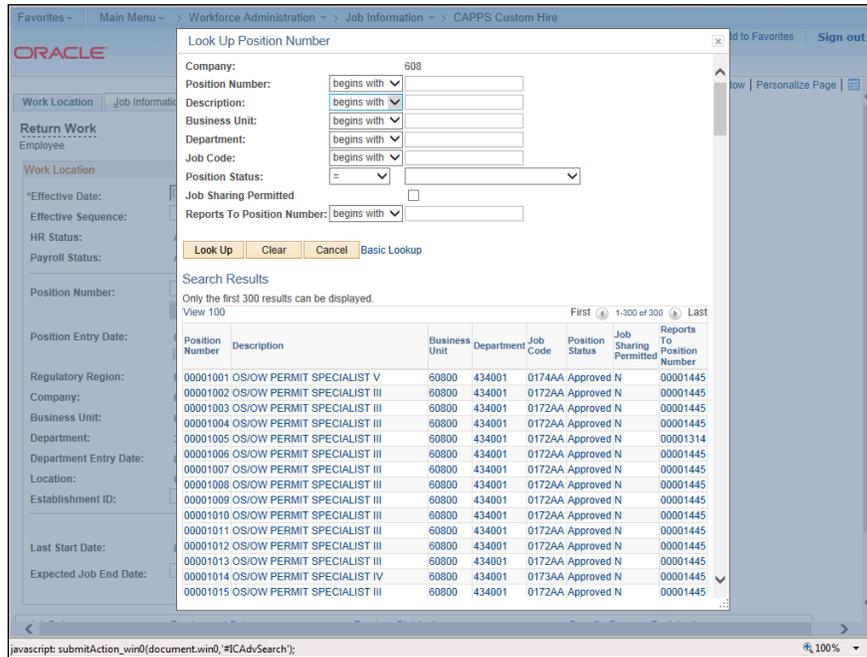
||| [Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

100%

Step	Action
17.	Click in the Telephone field. 
18.	Enter the updated phone number, " 512/555-0220 ", into the Telephone field.
19.	Click the Preferred option. <input type="checkbox"/>
20.	Click the Regional tab. 
21.	If necessary, update the information on the Regional tab, and then click the Organizational Relationships tab. 
22.	The Employee relationship is auto-selected on this screen, because the CAPPS Custom Hire form is only used for employees. Click the Add Relationship button to save your work and proceed to the Job Details area. 
23.	Notice that the Effective Date, Action and Action Reason Code are already filled out for you. CAPPS recognized that this person has a previous record of employment, so the Action is "Rehire" and Action Reason Code is "010" - New Hire or Rehire.
24.	Next, enter the position number for the employee, or look it up in the list. Click the Look up Position Number button. 

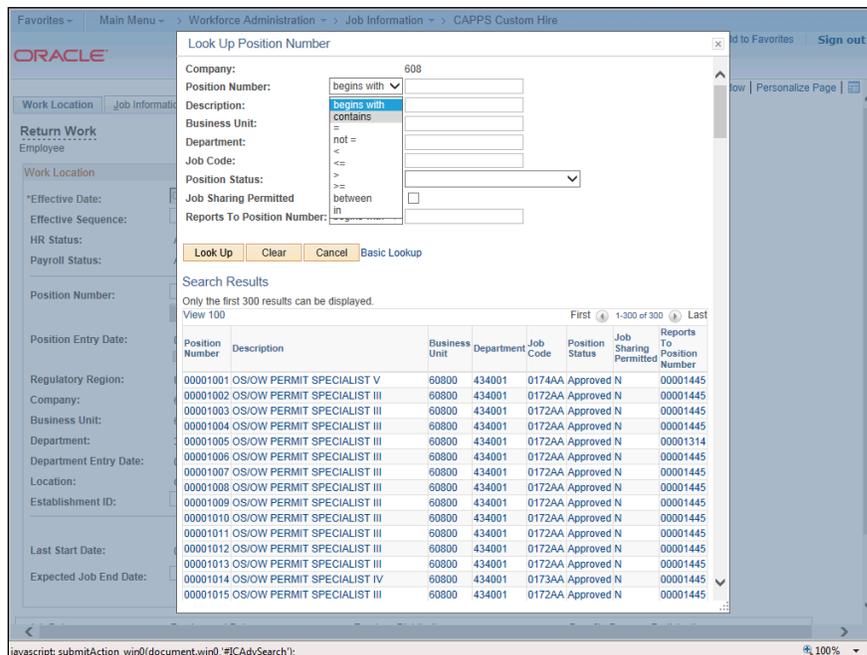


Step	Action
25.	<p>You can use the Advanced Lookup to search for your position.</p> <p>Caution: Notice that there may be multiple positions with the same description. It is important to select the right one. If you use the Lookup to search by Description, be sure you confirm that you have selected the correct position number.</p> <p>Click the Advanced Lookup link.</p> <p></p>

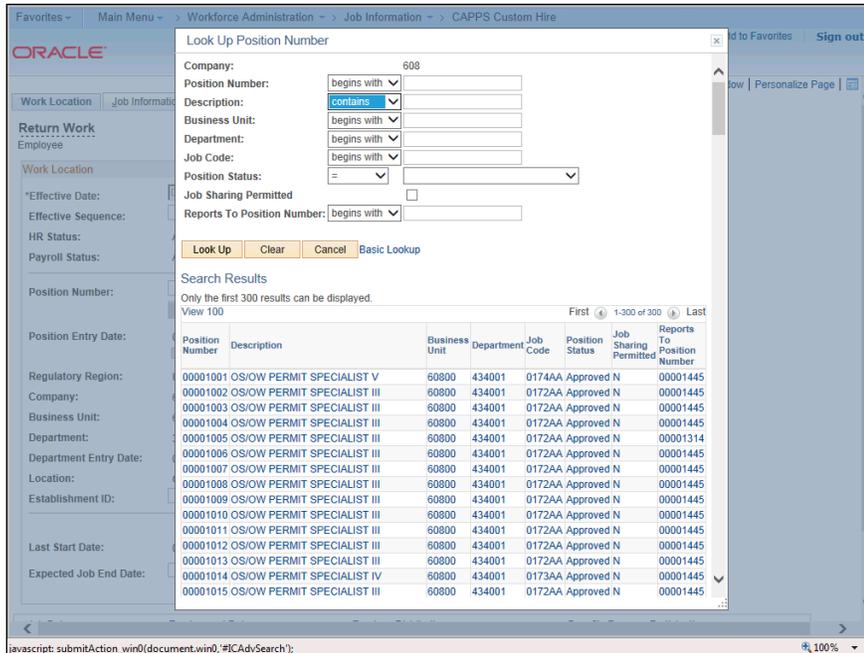


Step	Action
26.	Open the dropdown list for the Description field.

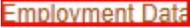
begins with ▼

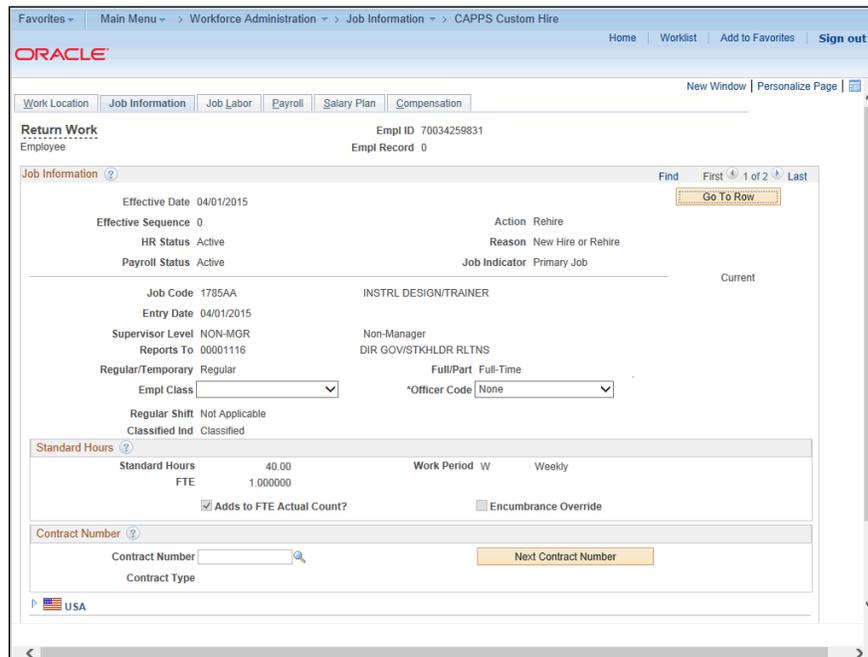


Step	Action
27.	Change begins with to contains . contains



Step	Action
28.	Click in the Description field. Description: contains <input type="text"/>
29.	Enter the portion of the position title that you know. For this example, you are looking for a Trainer . Enter " Trainer " into the Description field. Description: contains <input type="text"/>
30.	Press [Enter] .
31.	The search results are shown below. In this case, there is only one Trainer Position to choose from. Click the 00001121 link. 00001121

Step	Action
32.	The position number is entered into the field, and information about that position populates other fields as well.
33.	Click the scrollbar to view the bottom of the screen.
34.	Web Services has updated the Retirement Code automatically.
35.	To see the updated Return-to-Work information, click the Employment Data link. 
36.	Return-to-Work Information has been updated for the rehired employee.
37.	Return to the Job Data screen by clicking the Job Data link. 
38.	Click the Job Information tab. 



Step	Action
39.	Verify the Job Information that was imported with the Position, and then click the Payroll Tab. 

[Favorites](#) | [Main Menu](#) > [Workforce Administration](#) > [Job Information](#) > [CAPPS Custom Hire](#)

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ORACLE New Window | Personalize Page |

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Return Work Empl ID 70034259831
 Employee Empl Record 0

Payroll Information Find First 1 of 2 Last
[Go To Row](#)

Effective Date 04/01/2015
 Effective Sequence 0 Action Rehire
 HR Status Active Reason New Hire or Rehire
 Payroll Status Active Job Indicator Primary Job

*Payroll System: Current

Payroll for North America

Pay Group:
 Employee Type: Holiday Schedule:
 Tax Location Code: FICA Status:
 GL Pay Type: [Edit ChartFields](#)
 Combination Code:

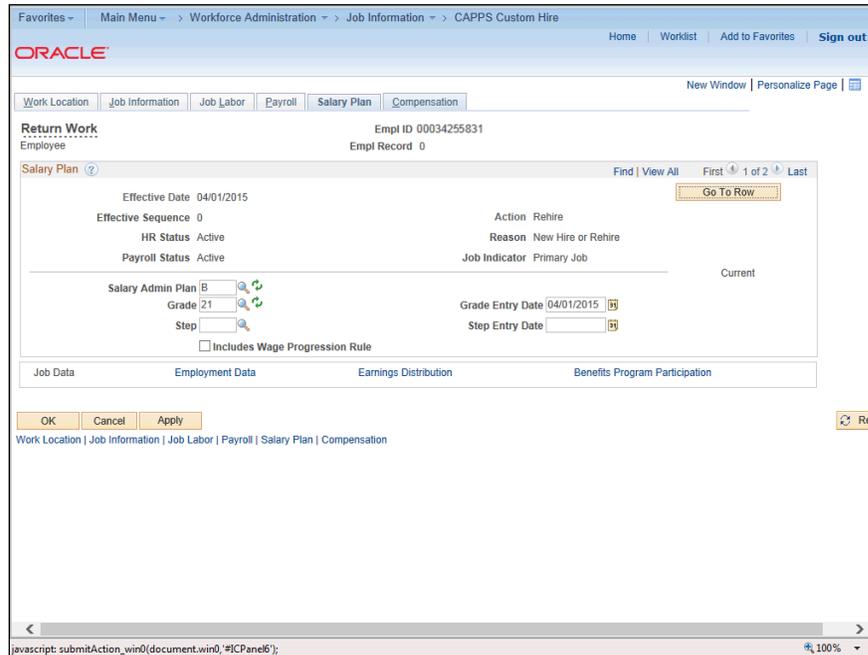
[Job Data](#) | [Employment Data](#) | [Earnings Distribution](#) | [Benefits Program Participation](#)

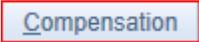
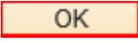
[Refre](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

javascript: submitAction_wir0(document.win0, '#CPanel5'); 100%

Step	Action
40.	Verify that the payroll information has posted correctly, and enter Pay Group if needed. Then click the Salary Plan tab. <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-left: 20px;">Salary Plan</div>



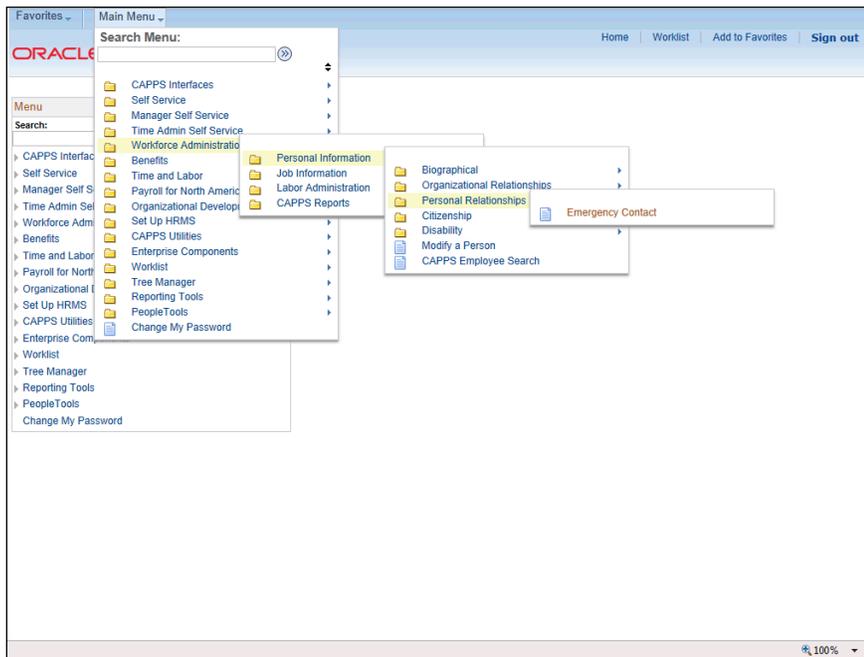
Step	Action
41.	Note the Salary Plan and Grade -- B-21. Click the Compensation tab. 
42.	Click in the Comp Rate field. 
43.	Enter a salary amount that is within the range for Grade B-21. For this example, enter " 5000 ".
44.	Note: Compensation will not calculate and will not be saved if you forget this step. Click the Calculate Compensation button. 
45.	Once the compensation has been calculated, you are finished with this phase of the rehire. Click the OK button. 
46.	Congratulations! You have successfully completed this lesson. End of Procedure.

New Hire Profile: Emergency Contact Information

Section 1 Exercises, Lesson 4: New Hire Profile: Emergency Contact Information

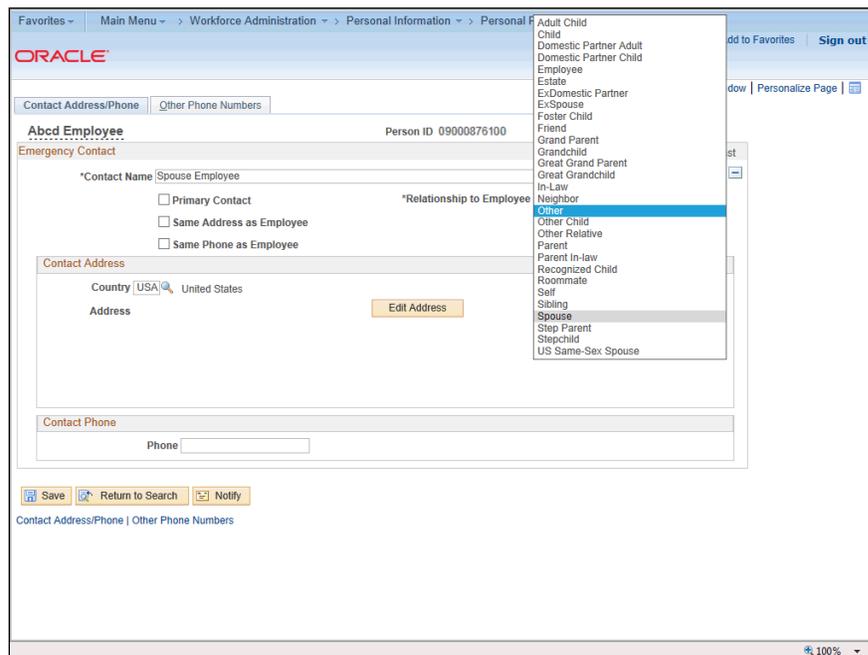
Procedure

In this lesson, you will enter Emergency Contact Information for the person you just hired.



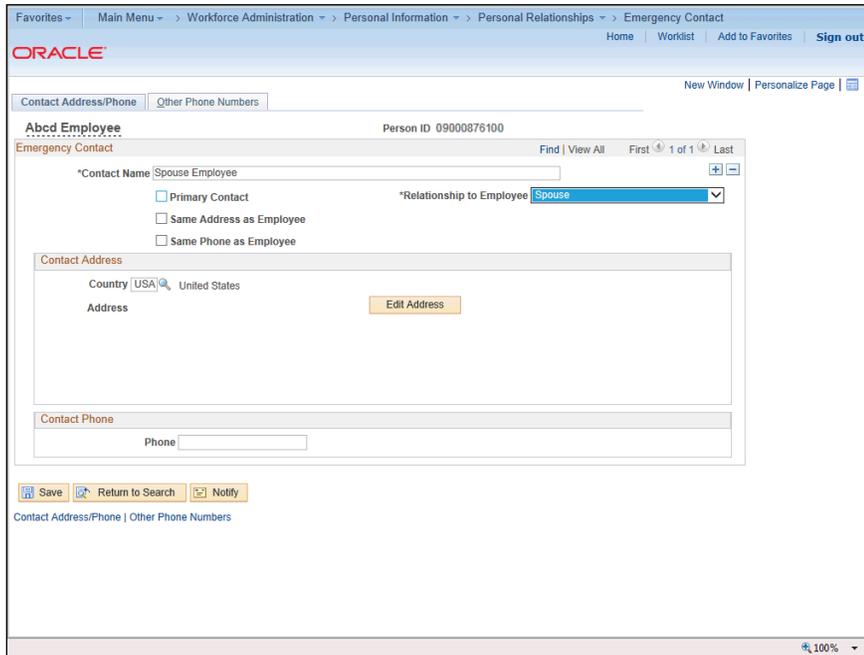
Step	Action
1.	<p>Begin by navigating to the Emergency Contact page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact.</p> <p>Click Emergency Contact.</p> 
2.	<p>Note: If you're performing this function immediately after entering other information about an employee, the system automatically goes to the Emergency Contact page for the last person you were editing. Otherwise, it would have taken you to the Search page first.</p> <p>If this is not the person you want to edit, click the Return to Search button.</p> <p>In this case, the correct employee is displayed.</p>

Step	Action
3.	Click in the Contact Name field. *Contact Name <input type="text"/>
4.	Enter the name of the Emergency Contact person in the Contact Name field. For this example, enter " Spouse Employee ". *Contact Name <input type="text"/>
5.	Open the Relationship to Employee list. *Relationship to Employee <input type="text" value="Other"/> ▼



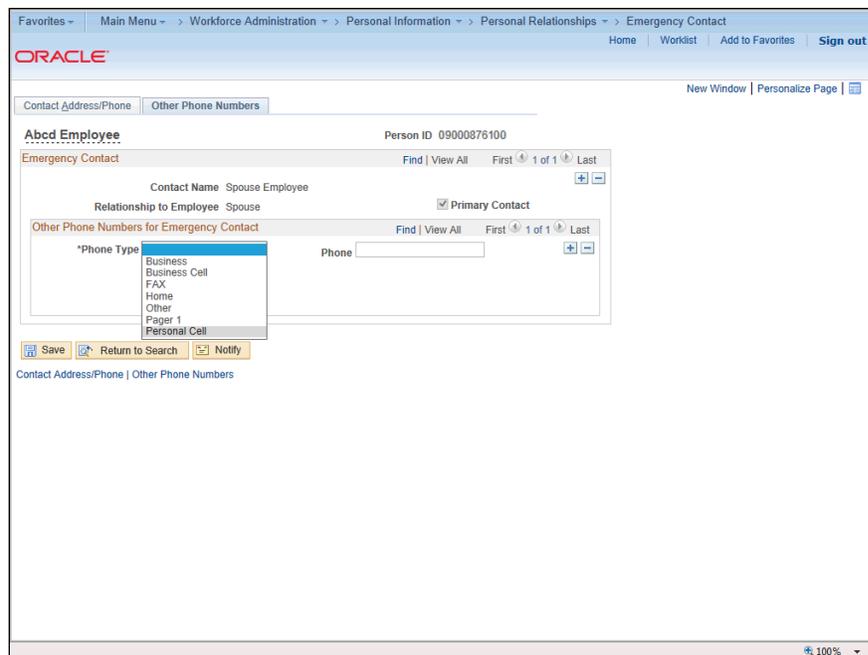
The screenshot shows the Oracle HR/Payroll system interface. The user is viewing the 'Emergency Contact' form for 'Abcd Employee' (Person ID: 09000876100). The form includes fields for 'Contact Name' (filled with 'Spouse Employee'), 'Relationship to Employee' (filled with 'Spouse'), 'Contact Address' (Country: USA, Address: United States), and 'Contact Phone'. A dropdown menu for 'Relationship to Employee' is open, showing a list of relationship types including 'Spouse', 'Spouse Employee', 'Domestic Partner Adult', etc. The 'Spouse' option is highlighted.

Step	Action
6.	Click the Spouse list item. <input type="text" value="Spouse"/>

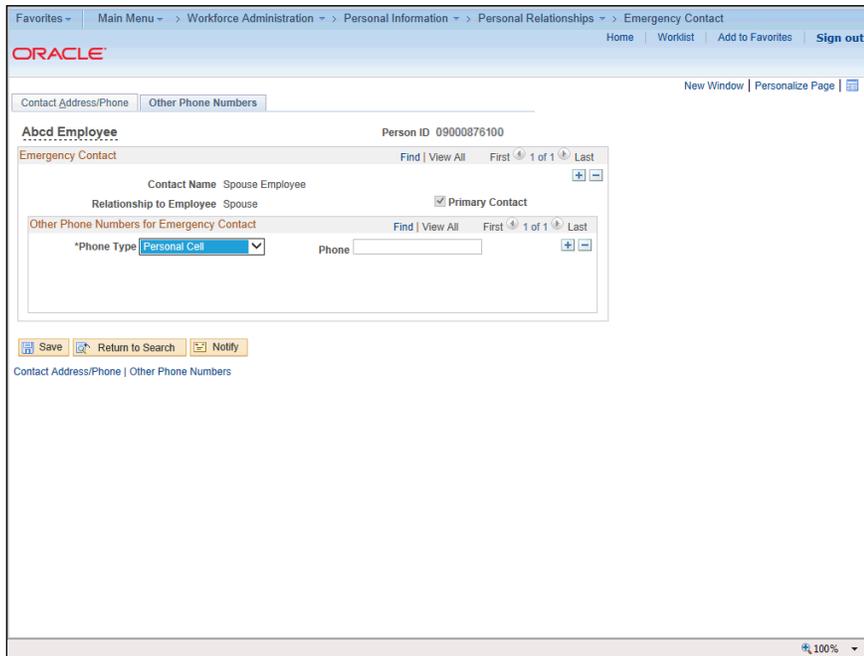


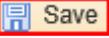
Step	Action
7.	Click the Primary Contact option. <input type="checkbox"/> Primary Contact
8.	If the Emergency Contact person has a different address than the Employee, click Edit Address and enter that address.
9.	For this example, the Emergency Contact has the same address as the Employee. Click the Same Address as Employee option. <input type="checkbox"/> Same Address as Employee
10.	Notice that the Employee's current address defaulted in the Address field, because the Emergency Contact's address is the same as the Employee's address.
11.	The Same Phone as Employee option works the same way. Click the Same Phone as Employee option. <input type="checkbox"/> Same Phone as Employee
12.	Notice that the Employee's phone number defaulted into the Phone field, below.
13.	To list a different phone number for the Emergency Contact, unselect the Same Phone as Employee checkbox. <input checked="" type="checkbox"/> Same Phone as Employee

Step	Action
14.	Click in the Phone field. Phone <input type="text"/>
15.	Enter the Emergency Contact's phone number into the Phone field. Enter " 5125559933 ". Phone <input type="text"/>
16.	Click the Save button. 
17.	Your Emergency Contact can have more than one phone number. Click the Other Phone Numbers tab. 
18.	Click the Phone Type list. *Phone Type <input type="text"/>



Step	Action
19.	Click the Personal Cell list item. 



Step	Action
20.	Click in the Phone field. 
21.	Enter the Emergency Contact's alternate phone number into the Phone field. Enter " 7135558855 ". 
22.	Click the Save button. 
23.	Congratulations! You have successfully completed this lesson. End of Procedure.

New Hire Profile: Disability Information

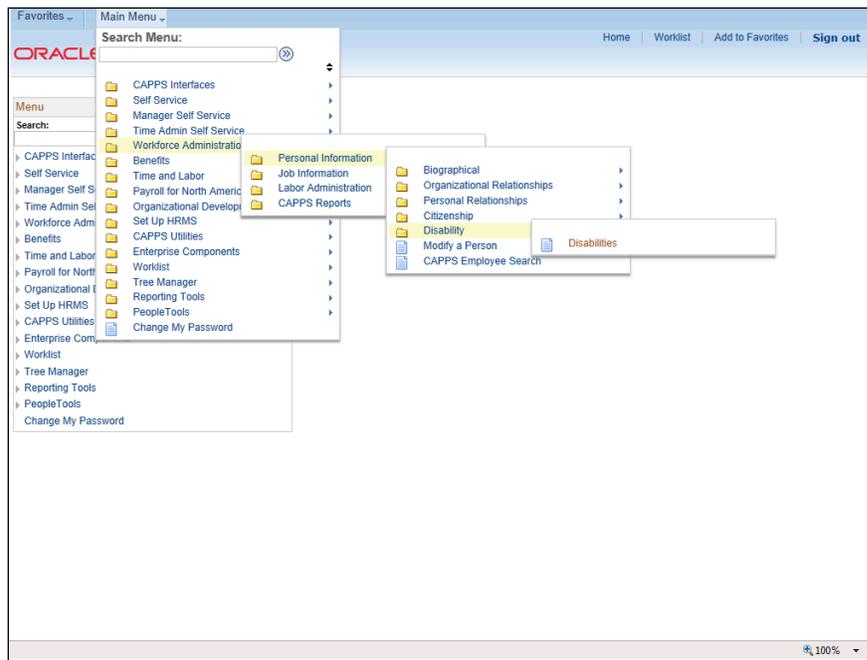
Section 1 Exercises, Lesson 5: New Hire Profile: Disability Information

Disability information is tracked by an outside vendor, and will not be entered into CAPPS. However, the Disability page has been enabled so that Agencies can use it to track Accommodation Requests if they choose to do so. Please note that this function does not interface with any outside systems or reports.

This lesson demonstrates how to navigate to these pages and provides a general overview. Specific instructions for the use of these pages can be determined by the Agencies.

Procedure

This lesson demonstrates how to navigate to the Disabilities pages and provides a general overview. Specific instructions for the use of these pages can be determined by the Agencies.



Step	Action
1.	<p>Begin by navigating to the Disabilities page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Personal Information > Disability > Disabilities.</p> <p>Click Disabilities.</p> 

Step	Action
2.	For this example, we will look up our employee by last name. Click in the Last Name field. Last Name: begins with ▼ <input type="text"/>
3.	Enter " Employee " into the Last Name field. Last Name: begins with ▼ <input type="text"/>
4.	Click the Search button. <input type="button" value="Search"/>
5.	Click the Abcd Employee link. <input type="button" value="Abcd Employee"/>
6.	To see all of the options on this page, click the Expand section button. 
7.	Veteran's Disability Status is tracked in a different application.
8.	Mr. Employee is disabled, but he is not a Vet, so he is not a Disabled Vet. Click the Disabled option. <input type="checkbox"/> Disabled
9.	Click the Accomm Request tab. <input type="button" value="Accomm Request"/>
10.	This screen is used to enter requests for Reasonable Accommodations due to disability. Use of this tab is determined by the Agency.
11.	Click the Accomm Option tab. <input type="button" value="Accomm Option"/>
12.	This screen is used to enter more information about Accommodation Requests . Use of this tab is determined by the Agency.
13.	Click the Accomm Job Task tab. <input type="button" value="Accomm Job Task"/>
14.	This screen is used to enter information about Accommodations related to specific Job Tasks. Use of this tab is determined by the Agency.

Step	Action
15.	When all information has been entered, click the Save button. 
16.	Congratulations! You have successfully completed this lesson. End of Procedure.

New Hire Profile: Citizenship Information

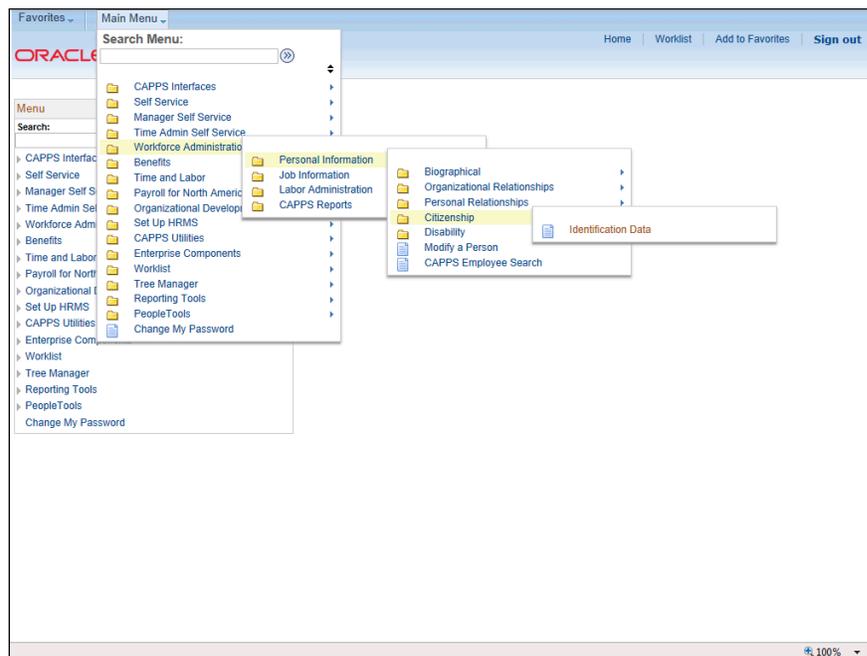
Section 1 Exercises, Lesson 6: New Hire Profile: Citizenship Information

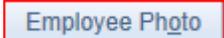
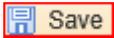
Citizenship information is tracked outside of CAPPS. However, the Citizenship page has been enabled so that Agencies can use it if they choose to do so. Please note that this function does not interface with any outside systems or reports.

This lesson demonstrates how to navigate to these pages and provides a general overview. Specific instructions for the use of these pages can be determined by the Agencies.

Procedure

This lesson demonstrates how to navigate to the Citizenship page, and provides a general overview. If an Agency decides to use this function, specific instructions can be developed by the Agency for its use.



Step	Action
1.	<p>Begin by navigating to the Identification Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Personal Information > Citizenship > Identification Data.</p> 
2.	<p>The first of three tabs on the Identification Data page allows you to enter Passport Information.</p>
3.	<p>Click the Visa/Permit Data tab.</p> 
4.	<p>The second tab provides an area where you can enter information about Visas or Permits.</p>
5.	<p>Click the Employee Photo tab.</p> 
6.	<p>The third tab could be used to display a photograph of the employee, such as a badge photo, for identification purposes.</p> <p>This function is currently disabled.</p>
7.	<p>Don't forget to save your work if you have entered information on these tabs.</p> <p>Click the Save button.</p> 
8.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

New Hire Profile: Driver's License Information

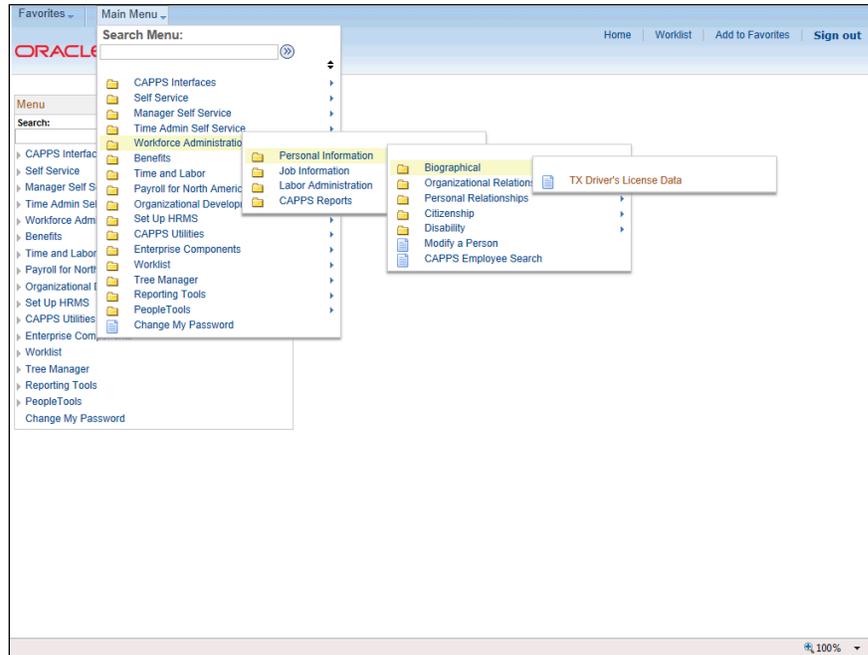
Section 1 Exercises, Lesson 7: New Hire Profile: Driver's License Information

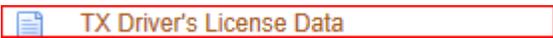
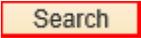
Driver's License Information is another optional function that has been enabled so that Agencies can use it if they have the need. It consists of a single page in the Biographical Information menu, where Driver's License information can be recorded.

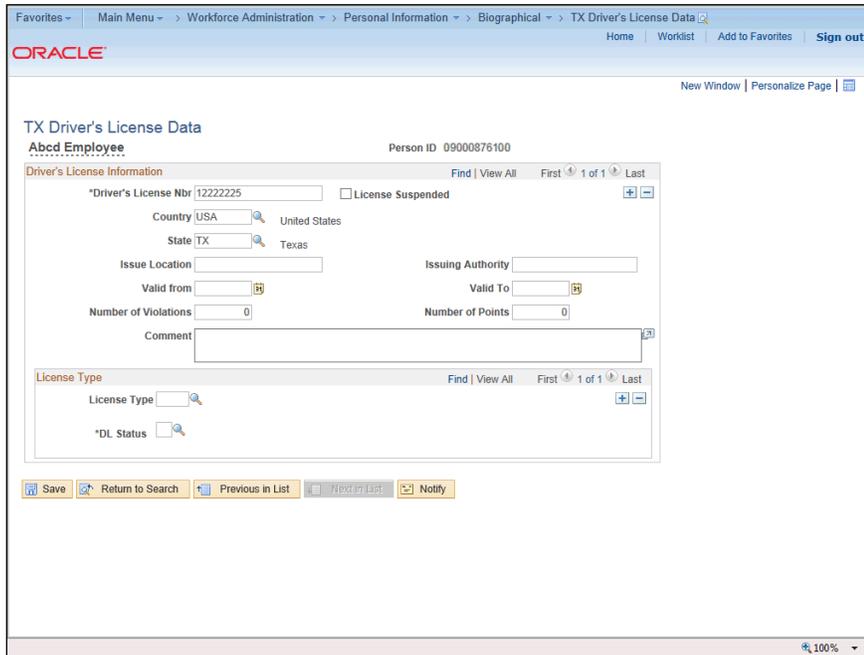
Procedure

In some instances, it might be necessary to track Driver's License information about the employee. This lesson demonstrates how to navigate to the Driver's License page, and provides a general overview of the screen.

If an Agency decides to use this function, specific instructions can be developed by the Agency for use of this feature.



Step	Action
1.	<p>Begin by navigating to the TX Driver's License Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Personal Information > Biographical > TX Driver's License Data.</p> <p></p>
2.	<p>Search for the employee whose information you want to enter.</p> <p>Click in the Last Name field.</p> <p>Last Name: begins with ▼ </p>
3.	<p>Enter "Employee" into the Last Name field.</p> <p>Last Name: begins with ▼ </p>
4.	<p>Click the Search button.</p> <p></p>
5.	<p>Click the 09000876100 link.</p> <p>09000876100</p>
6.	<p>This is the screen used to record Driver's License information.</p>



Step	Action
7.	When you have finished, click the Save button. 
8.	Congratulations! You have successfully completed this lesson. End of Procedure.

Transfers, Moves, and Terminations

Section 2: Transfers, Moves, & Terminations

Objectives:

- Learn how to transfer employees to a different agency, department, or position.
- Understand how Legislative transfers are processed.
- Understand all of the different termination types in CAPPS.
- Learn how to process all termination types.
- Learn how leave balances are zeroed out upon termination.

Please note that this training is specific to the CAPPS Human Resources system, and only covers the part of business processes that are performed in the system. Some processes may be affected by outside process steps, documentation requirements, or Agency-specific policies and procedures that are not covered in this training.

Transferring to a Different Agency

Section 2 Exercises, Lesson 1: Transferring to a Different Agency

Learn to transfer employees from and to your agency by terminating the outgoing employees, and using the CAPPS Custom Hire page to rehire incoming employees.

Note: The termination and rehire actions must be coordinated between the respective agencies.

- The destination agency should NOT hire the transferring employee until AFTER the system processes the termination of the transferring employee at the originating agency. If the employee is transferring from one CAPPS Agency to another, the system will prevent them from being hired before the termination is complete. However, if the transfer is not CAPPS to CAPPS, then the system will not stop the hire.
- In addition, the date of hire at the two agencies must be the same, to prevent a break or overlap in service.

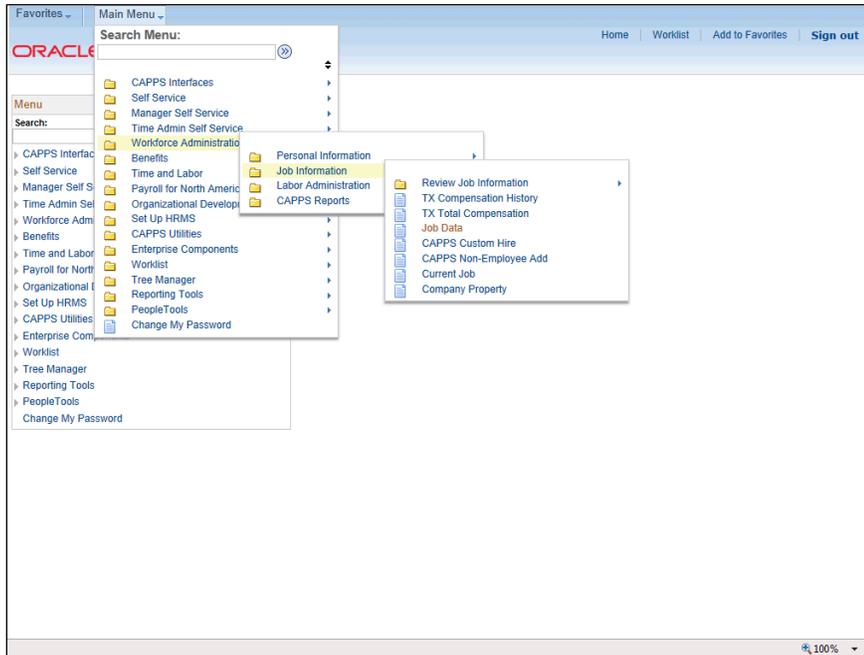
Procedure

When an employee makes an inter-agency transfer, he is terminated in the "losing" agency and then rehired in the "hiring" agency, using special Action/Reason codes for each transaction.

This lesson will demonstrate that process, by transferring one employee out of the agency, and another employee in.

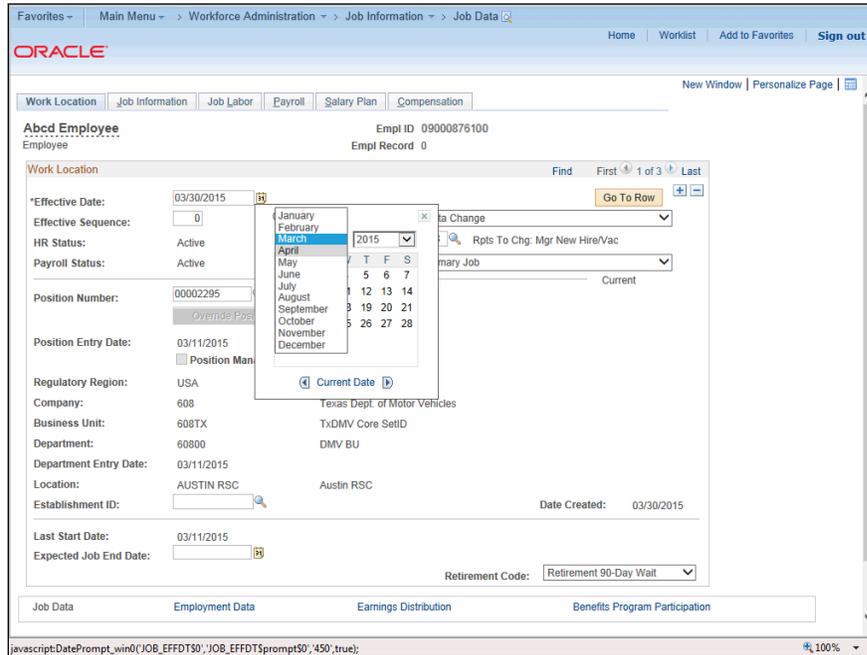
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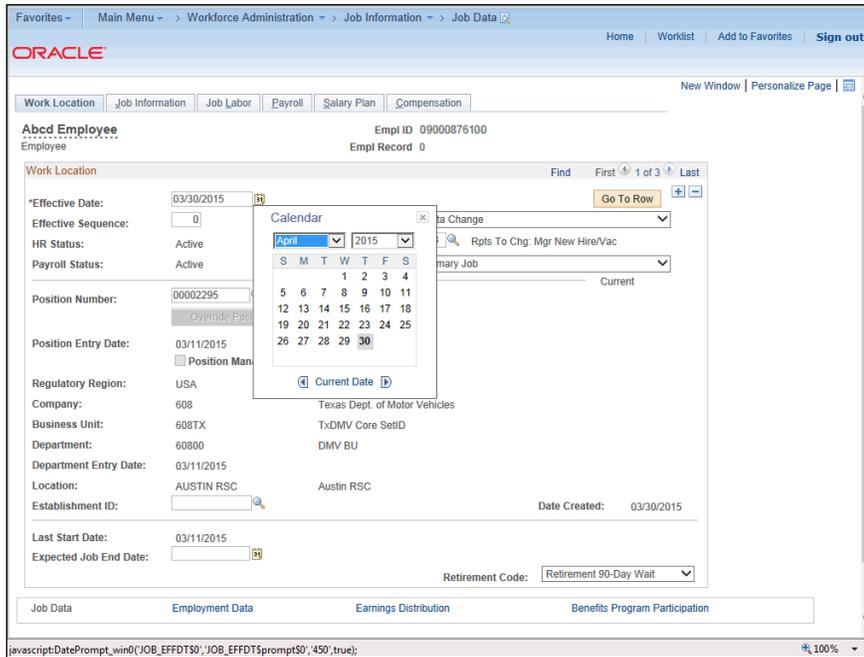


Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data.</p> 
2.	<p>Mr. Employee is transferring to another agency.</p> <p>Enter "09000876100" into the Empl ID field.</p> <p>Empl ID: begins with  </p>
3.	<p>Click the Search button.</p> 
4.	<p>Begin your changes by adding a new row to the tables.</p> <p>Click the Add a new row button.</p> 
5.	<p>The Effective Date for this transfer will be 4/01/2015.</p> <p>Click the Choose a date button.</p> 

Step	Action
6.	Click the list. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> March ▼ </div>

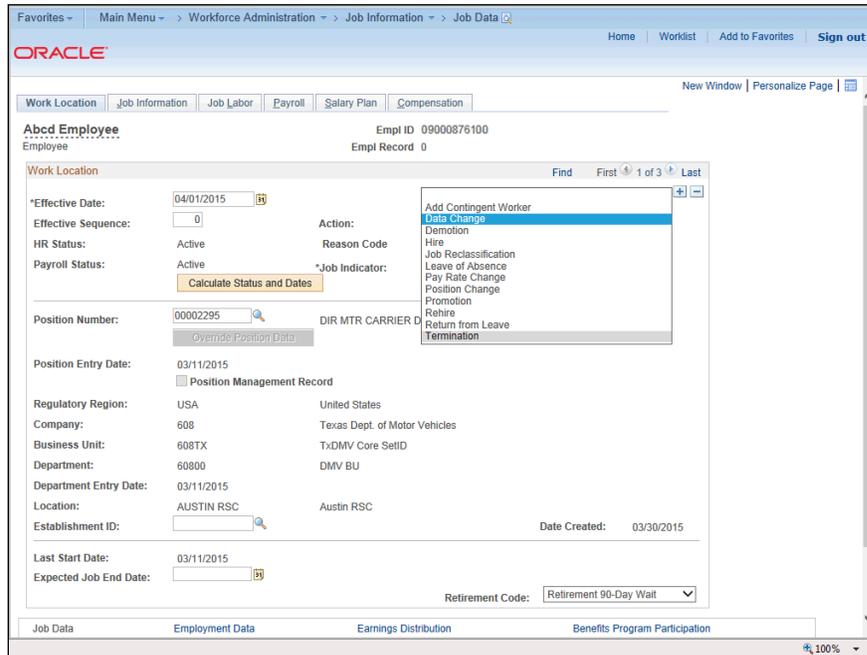


Step	Action
7.	Select April . <div style="border: 1px solid black; padding: 2px; display: inline-block; background-color: #cccccc;"> April </div>



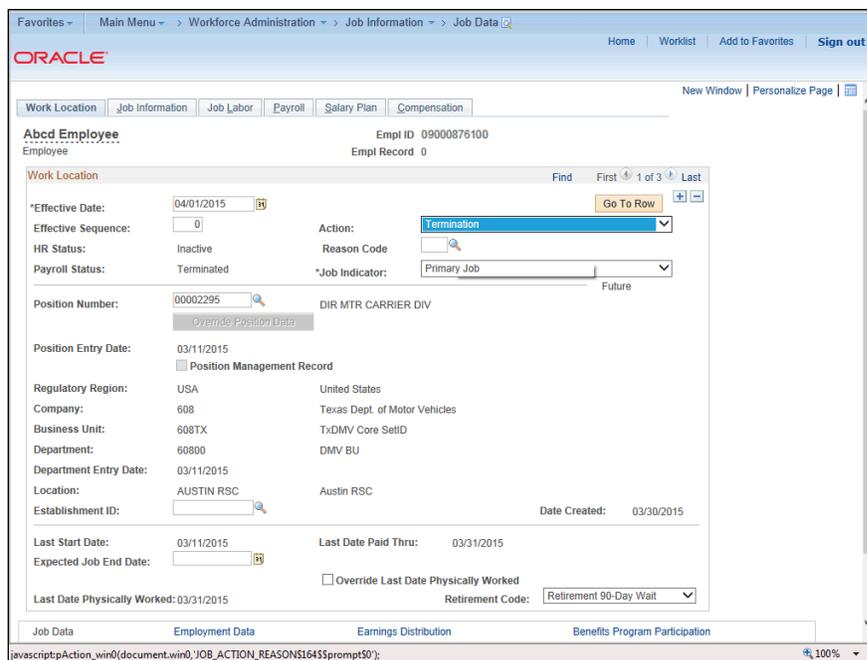
The screenshot shows the Oracle HR/PAYROLL interface for employee 'Abcd Employee' (Empl ID 09000876100). The 'Effective Date' is set to 03/30/2015. A calendar pop-up is open for April 2015, with the 30th highlighted. The interface includes various tabs like 'Work Location', 'Job Information', and 'Payroll', and a 'Data Change' dropdown menu.

Step	Action
8.	Click the 1 link. 
9.	<p>In order to transfer Mr. Employee to another agency, you must first terminate him in his current agency, and coordinate with the gaining agency to make sure the rehire is entered for the correct Effective Date.</p> <p>Note: The agency that he is transferring to should not rehire him until after you complete this termination at his current agency.</p> <p>Open the Action list.</p> <p>Action: </p>



The screenshot shows the Oracle HR/PAYROLL Job Data page for Employee 'Abcd Employee' (Empl ID 09000876100). The 'Work Location' tab is active. The 'Action' dropdown menu is open, showing a list of actions including 'Add Contingent Worker', 'ARPL Change', 'Demotion', 'Hire', 'Job Reclassification', 'Leave of Absence', 'Pay Rate Change', 'Position Change', 'Promotion', 'Rehire', 'Return from Leave', and 'Termination'. The 'Termination' option is highlighted.

Step	Action
10.	Select Termination from the Action list.

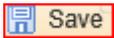


The screenshot shows the Oracle HR/PAYROLL Job Data page for Employee 'Abcd Employee' (Empl ID 09000876100) after selecting 'Termination'. The 'Action' dropdown menu is now set to 'Termination'. The 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Terminated'. The 'Last Date Paid Thru' is 03/31/2015. The 'Last Date Physically Worked' is 03/31/2015. The 'Retirement Code' is 'Retirement 90-Day Wait'.

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Step	Action
11.	Click the Look up Reason Code button. 
12.	Select the Reason Code for a Transfer to Another Agency . Click the 065 link. 
13.	Now you just need to save the change. Scroll down to the bottom of the page.
14.	Click the Save button. 
15.	Once the system has completed processing the termination, the hiring agency, the Department of Information Resources (Agency 313), will enter a Rehire for Mr. Employee in his new position, effective the same day as the termination we just entered. Since we can't see that agency's data, let's look at the second half of the process by hiring a different person, who is transferring in to our agency. Click the scrollbar to go back to the top of the screen.
16.	Let's start over at the Home page. Click the Home link. 
17.	When someone is transferring in to our agency, we begin our part of the process by Rehiring them. Note: Remember that the employee's termination at the other agency must be completed prior to their rehire at your agency, so that Web Services will be able to provide correct data. Rehires are performed through the CAPPS Custom Hire page. 
18.	Enter the Social Security Number of the employee into the National ID field. For this example, enter " 608995885 ". National ID 

Step	Action
19.	<p>If CAPPS recognizes this National ID number, it will filled in the Empl ID and the Name right away.</p> <p>Press [Tab].</p>
20.	<p>Notice that the Empl ID and Name have already been entered. This employee previously worked for a CAPPS agency, and so the system retrieved that information from the tables.</p>
21.	<p>Continue by entering your Agency number in the Company field.</p> <p>Enter "608".</p> <p>*Company <input data-bbox="574 726 639 764" type="text"/></p>
22.	<p>Click in the Hire Date field.</p> <p>*Hire Date <input data-bbox="574 827 716 865" type="text"/></p>
23.	<p>Remember that the Hire Date must be the same day as the Effective Date of the termination at the employee's previous agency. This prevents a break or overlap in service.</p> <p>You can type the hire date into the field instead of selecting it from the list.</p> <p>Enter "012615" into the Hire Date field.</p> <p>*Hire Date <input data-bbox="574 1129 716 1167" type="text"/></p>
24.	<p>Press [Tab] to format the date.</p>
25.	<p>Click the Continue button.</p> <p><input data-bbox="440 1276 716 1314" type="button" value="Continue"/></p>
26.	<p>This is the message that you will see if you try to rehire your transferee before she has been terminated at another CAPPS agency. You will not be able to continue with the Rehire until the termination has been processed.</p> <p>In this case, the message is just shown for training purposes.</p> <p>Click the OK button and pretend you didn't see that.</p> <p><input data-bbox="440 1577 581 1614" type="button" value="OK"/></p>
27.	<p>Instead, you should see this message, which means that CAPPS wants you to verify that you have the right person.</p> <p>Click the OK button.</p> <p><input data-bbox="440 1780 581 1818" type="button" value="OK"/></p>

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[Favorites](#) | [Main Menu](#) | [Workforce Administration](#) | [Job Information](#) | [CAPPS Custom Hire](#)

[Home](#) | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

ORACLE New Window | Personalize Page |

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Empl Person Person ID: 00000168168

Name [Find](#) | [View All](#) | First 1 of 1 Last

*Effective Date: 01/26/2015
 *Format Type: English
 Display Name: Empl Person [Edit Name](#)

Biographic Information

Date of Birth: 08/25/1962 52 Years 7 Months
 Date of Death:
 Birth Country:
 Birth Location: Commissioned Peace Officer:

Info Release Indicators

Allow the following to be released to the public : Release All: Release None:

*Home Address Release: *SSN Release: *Emergency Contact Info Rel:

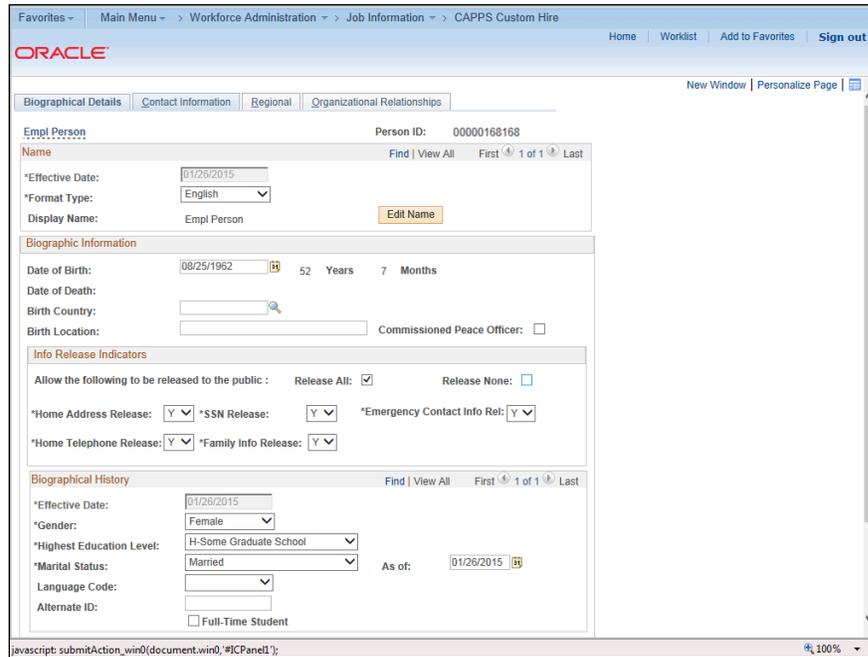
*Home Telephone Release: *Family Info Release:

Biographical History [Find](#) | [View All](#) | First 1 of 1 Last

*Effective Date: 01/26/2015
 *Gender: Female
 *Highest Education Level: H-Some Graduate School
 *Marital Status: Married As of: 01/26/2015
 Language Code:
 Alternate ID:
 Full-Time Student

100%

Step	Action
28.	<p>Verify that the Information Release Indicators are set. If they are blank, select Release All.</p> <p>Note that these indicators can be changed by the employee in Employee Self Service.</p> <p>Click Release All.</p> <p><input checked="" type="checkbox"/></p>



The screenshot shows the 'Contact Information' tab selected. The 'Empl Person' section displays the name 'Empl Person' and an 'Edit Name' button. The 'Biographic Information' section shows a date of birth of 08/25/1962, resulting in 52 years and 7 months. The 'Info Release Indicators' section has several checkboxes for releasing information to the public, with 'Release All' checked. The 'Biographical History' section shows an effective date of 01/26/2015, gender as Female, highest education level as H-Some Graduate School, and marital status as Married.

Step	Action
29.	Click the Contact Information tab. 
30.	Verify that Contact Information is current, and update it as needed. Let's add a new phone number for this employee. Click the Add a new row (Alt+7) button. 
31.	Click the Phone Type list. 

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Favorites - Main Menu - Workforce Administration - Job Information - CAPPS Custom Hire Home Worklist Add to Favorites Sign out

ORACLE

Biographical Details Contact Information Regional Organizational Relationships

Empl Person Empl ID 00000168168

Current Addresses Personalize Find View All First 1 of 1 Last

Address Type	As Of Date	Status	Address	
Home	01/26/2015	A	2929 Masked Street AUSTIN, TX 78735 227	Edit/View Address Detail + -

Phone Information Personalize Find View All First 1-2 of 2 Last

*Phone Type	Telephone	Extension	Preferred	
Home	512/555-4000		<input checked="" type="checkbox"/>	+ -
Business			<input type="checkbox"/>	+ -
Business Cell			<input type="checkbox"/>	+ -
FAX			<input type="checkbox"/>	+ -
Home			<input type="checkbox"/>	+ -
Other			<input type="checkbox"/>	+ -
Pager 1			<input type="checkbox"/>	+ -
Personal Cell			<input type="checkbox"/>	+ -

*Email Address Preferred + -

Instant Message IDs Personalize Find View All First 1 of 1 Last

*IM Protocol	*IM Domain	*Network ID	Preferred	
			<input type="checkbox"/>	+ -

Biographical Details Contact Information Regional Organizational Relationships

100%

Step	Action
32.	Click the Personal Cell list item. Personal Cell

Favorites - Main Menu - Workforce Administration - Job Information - CAPPS Custom Hire Home Worklist Add to Favorites Sign out

ORACLE

Biographical Details Contact Information Regional Organizational Relationships

Empl Person Empl ID 00000168168

Current Addresses Personalize Find View All First 1 of 1 Last

Address Type	As Of Date	Status	Address	
Home	01/26/2015	A	2929 Masked Street AUSTIN, TX 78735 227	Edit/View Address Detail + -

Phone Information Personalize Find View All First 1-2 of 2 Last

*Phone Type	Telephone	Extension	Preferred	
Home	512/555-4000		<input checked="" type="checkbox"/>	+ -
Personal Cell			<input type="checkbox"/>	+ -

Email Addresses Personalize Find View All First 1 of 1 Last

*Email Type	*Email Address	Preferred	
		<input type="checkbox"/>	+ -

Instant Message IDs Personalize Find View All First 1 of 1 Last

*IM Protocol	*IM Domain	*Network ID	Preferred	
			<input type="checkbox"/>	+ -

Biographical Details Contact Information Regional Organizational Relationships

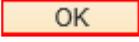
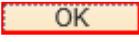
100%

Step	Action
33.	Click in the Telephone field. 
34.	Enter the desired information into the Telephone field. Enter " 512/555-3373 ".
35.	Click the Preferred option. <input type="checkbox"/>
36.	Click the Regional tab. 
37.	Regional Settings may be updated if necessary, but probably will not change at this point.
38.	Click the Organizational Relationships tab. 
39.	Since this is a Rehire, and you are using the CAPPS Custom Hire page, the only Organizational Relationship available is Employee . Click the Add Relationship button to save your work so far and move to the Job Data page. 
40.	Click the Look up Reason Code (Alt+5) button. 
41.	Notice the Reason Codes available for this transfer. If this was a Legislatively Mandated Transfer, you would use the Reason Code "LEG".
42.	For this example, the transfer is not Legislatively Mandated. Click the Reason Code for an Inter-Agency Transfer In , which is 012 . 
43.	Ms. Person is joining our Agency as an Instructional Designer. Enter her new Position number, " 00001121 ", in the Position Number field. 
44.	Click the Job Information tab. 
45.	Job Information comes from the Position number. Verify that everything looks correct.

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Step	Action
46.	Click the Payroll tab. 
47.	Verify that all information was populated correctly, or select the correct Pay Group if necessary.
48.	Click the Salary Plan tab. 
49.	Note the Salary Plan and Grade , which defaulted from the Job Code, so that you can verify the compensation amount.
50.	Then click the Compensation tab. 
51.	Click in the Comp Rate field. 
52.	Ms. Person's salary will be \$4023.16 per month, as that is the beginning salary for Salary Plan B, Grade 21 in FY15. Enter " 4023.16 " into the Comp Rate field.
53.	Always click the Calculate Compensation button when entering or adjusting salary. 
54.	Click the OK button. 
55.	If you see this message, it means that the position number you chose is already occupied. Either you chose the wrong position, or the person who formerly occupied this position has not yet been terminated. Best practice is that each Employee position should have only one incumbent. Again, this message is only shown for training purposes. Click the OK button. 

Step	Action
56.	<p>Look for the Saved icon to verify that the process has successfully completed. When the system finishes saving your work, it will return to the Organizational Relationship page.</p> <p>Press Enter to continue.</p> 
57.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Prior State Service Row Insertion

Section 2 Exercises, Lesson 3: Prior State Service Row Insertion

When transferring from a CAPPS Central agency to another CAPPS Central agency, Prior State Service Rows are inserted automatically.

However, when transferring from a CAPPS Hub agency or from a Non-CAPPS, Prior State Service must be entered manually.

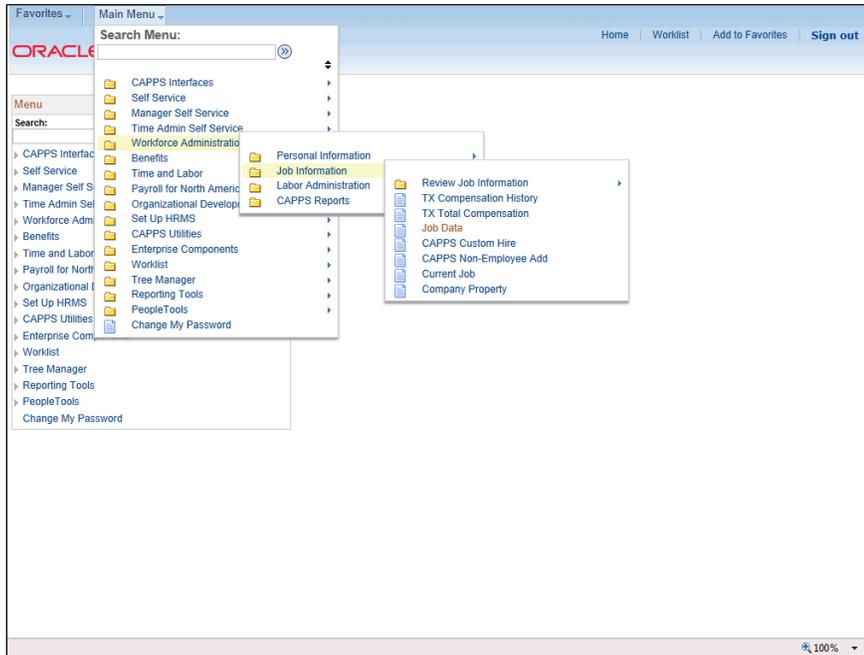
Procedure

Whenever an employee transfers from one agency to another, or leaves an agency and then comes back later, a row must be added to the Prior State Service table to ensure their State Effective Service date accurately reflects all of their service. If the Prior State Service is from a CAPPS Central Agency, the row will automatically be inserted. If not, then the row must be validated and manually entered.

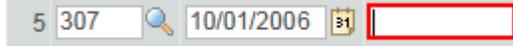
This lesson will demonstrate where that information can be reviewed, when it needs to be updated manually, and how it is entered.

CAPPS HR/PAYROLL

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Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data.</p> 
2.	<p>The employee we will be working with in this lesson is named Empl Person. Her first name is unique, so let's search for Ms. Person by her first name.</p> <p>Click in the Name field.</p> <p>Name: begins with ▼ <input type="text"/></p>
3.	<p>Enter "empl" into the Name field.</p> <p>Name: begins with ▼ <input type="text"/></p>
4.	Press [Enter] .
5.	If the system only finds one record with your search criteria, the record will open directly on the screen instead of asking you to select from a list.
6.	<p>To view or enter Prior State Service rows, we need to go to the Employment Data page. The link for Employment Data is at the bottom of the Job Data page.</p> <p>Click the scrollbar to scroll down.</p>

Step	Action
7.	Click the Employment Data link. 
8.	Prior State Service is the second tab on the Employment Data page. Click the Prior State Service tab. 
9.	The record shows that Ms. Person has worked for four different agencies over the past thirty years. But not all service may appear immediately following the hire. A daily process inserts the most recent prior period of employment in CAPPS. If the most recent period of service was outside of CAPPS Central, then the Agencies must validate and manually insert that period of service. Note: Has that daily process run yet? Before manually inserting a period of service that is missing, wait at least one day for the process to run overnight.
10.	To update the record and include the missing service, begin by adding a row to the table. Click the Add a new row (Alt+7) button. 
11.	Ms. Person worked for the Secretary of State from October 1, 2006 to July 16, 2012. Enter the Agency number for the Secretary of State, which is "307", in the Agency field. 
12.	Press [Tab] to get to the next field.
13.	Click in the Hire Date field. 
14.	Enter the date she was hired, "10012006", in the Hire Date field. 
15.	Press [Tab] to get to the Term Date field.
16.	Enter the termination date, "07162012", into the Term Date field. 
17.	Press [Tab] .

Step	Action
18.	Click the Save button. 
19.	Notice that the Total Prior State Service row updated when the record was saved.
20.	Congratulations! You have successfully completed this lesson. End of Procedure.

Moving Within the Same Agency

Section 2 Exercises, Lesson 2: Moving within the Same Agency

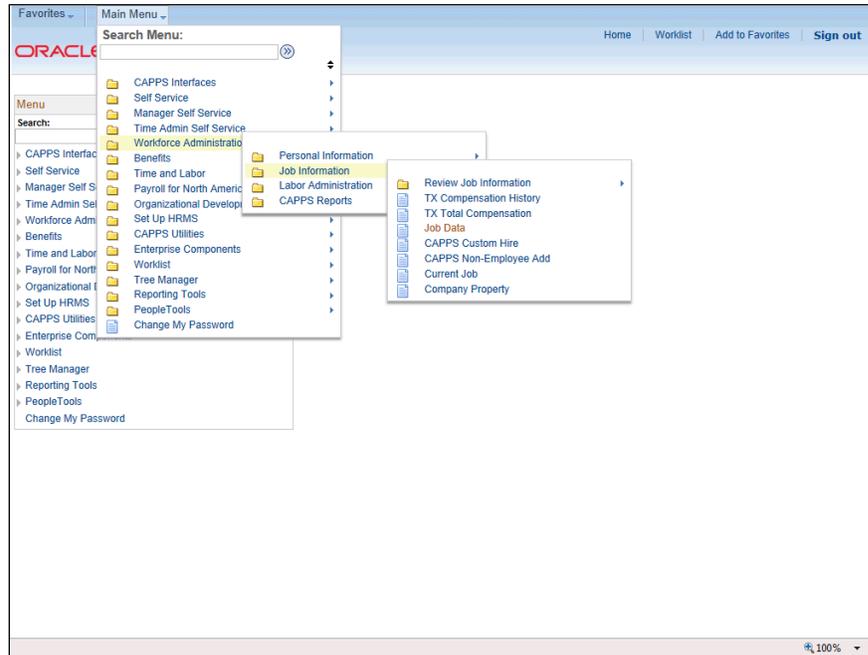
When an employee changes positions within an agency, it is referred to as a "Move" rather than a "Transfer". Moves from one position to another within an agency are processed by using the Action code "Data Changes", and selecting the appropriate Reason code.

In this lesson, you will learn to move an employee from one position within the agency to another, with no change in salary.

Procedure

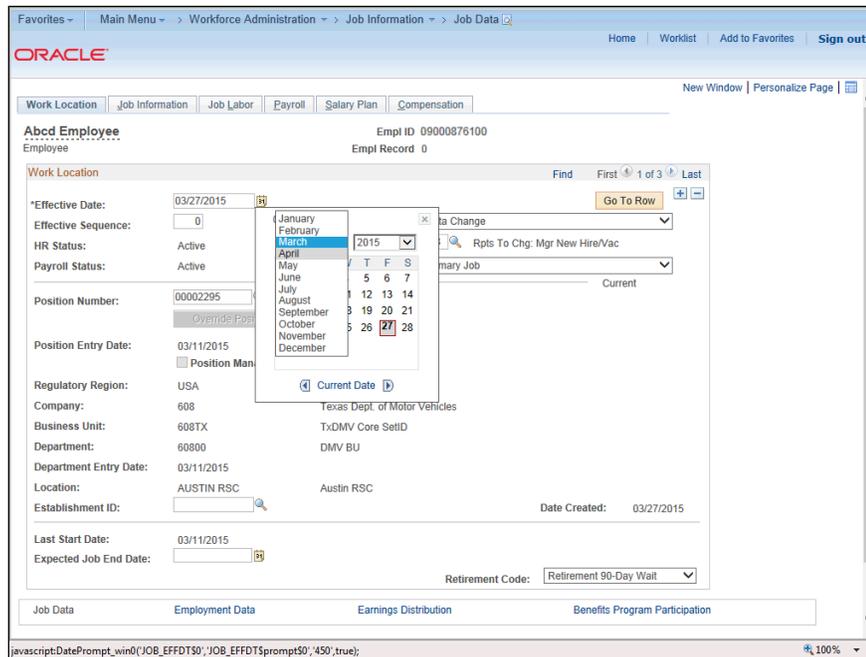
When an employee moves from one position to another within the same agency, it is not considered a transfer. Instead of terminating the employee from one agency and rehiring him at the other, you will simply change the position number for the employee.

In this scenario, Mr. Employee is moving from one position to another, with no change in salary. The first four digits of the Job Code stay the same.

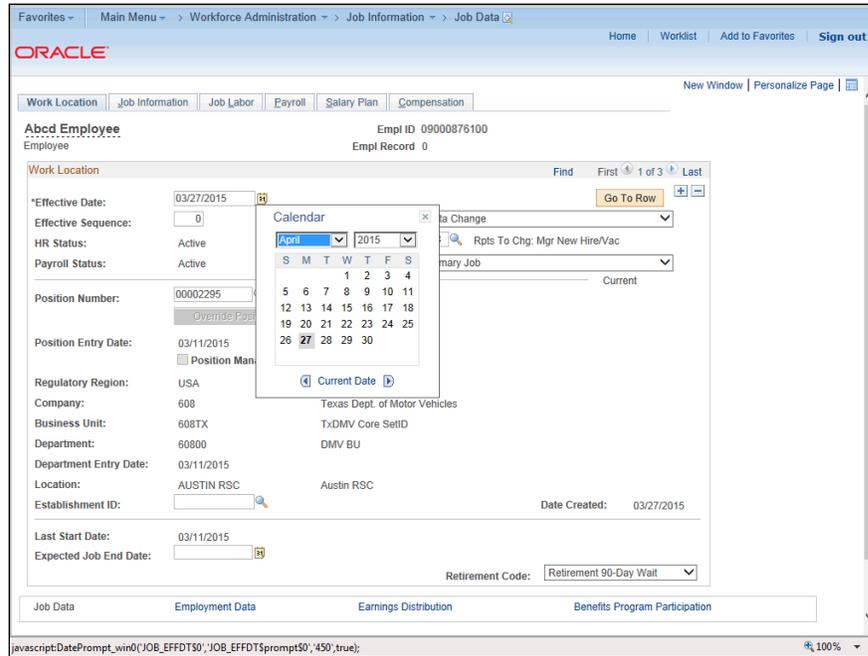


Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data</p> <p></p>
2.	<p>The director of a different department within this agency has resigned, and Mr. Employee has been chosen to move into his position.</p> <p>Search for Mr. Employee by name.</p> <p>Click in the Name field.</p> <p>Name: begins with ▼ <input type="text"/></p>
3.	<p>Enter "abcd" into the Name field.</p> <p>Name: begins with ▼ <input type="text"/></p>
4.	<p>Click the Search button.</p> <p></p>

Step	Action
5.	To change Mr. Employee's position number, you must first add a new Effective Dated row. Click the Add a new row (Alt+7) button. 
6.	Notice that when you added the row, your Row Counter changed from "1 of 2" to "1 of 3".
7.	The new row also displays the current date, by default. This position change is going to take place on April 1, 2015. Click the Choose a date (Alt+5) button. 
8.	Click the Month list. 



Step	Action
9.	Select April . 



Step	Action
10.	Click the 1 link. 
11.	The Action for this change is Data Change , which in this case is already selected. Click the Look up Reason Code (Alt+5) button. 
12.	To change positions with no change in salary, the Reason Code that you will use is 038 - Change Non-Salary Rate Data . In this case, the first four digits of the Job Code for the new Position are the same as the former position, so 038 is the correct Reason Code . Click the 038 link. 
13.	Note that Mr. Employee is currently a Director of the Motor Carrier Division. His new position will be a Director as well.
14.	Click in the Position Number field. Position Number: 

Step	Action
15.	Clear out the current value by clicking the X in the field. Position Number: <input type="text" value="00002295"/>
16.	Enter the new position number for Mr. Employee, " 00001588 ", in the Position Number field. Position Number: <input type="text"/>
17.	Press [Tab] .
18.	Notice that the position information has updated, and the new position description is Dir Enforcement Div.
19.	Nothing else should be changed, but you should still validate the position attributes on the other tabs. Click the Job Information tab. <input type="button" value="Job Information"/>
20.	Verify that the data on the Job Information tab is correct, and then click the Payroll tab. <input type="button" value="Payroll"/>
21.	Verify that the data on the Payroll tab is correct, and then click the Salary Plan tab. <input type="button" value="Salary Plan"/>
22.	The Plan and Grade did not change for this move. Verify that the data on the Salary Plan tab is correct, and then click the Compensation tab. <input type="button" value="Compensation"/>
23.	There is no change in compensation in this case. Click the Save button. <input type="button" value="Save"/>
24.	Congratulations! You have successfully completed this lesson. End of Procedure.

Entering a Termination

Section 2 Exercises, Lesson 4: Entering a Termination

All types of Terminations are entered the same way, with the same Action code and a different Reason for each. The Reason Codes for terminations are listed below:

057 - Resignation in lieu of involuntary separation.

060 - Voluntary separation from agency.

- 063 - Termination at will.
- 064 - Reduction in force.
- 065 - Transfer to a different state agency or institution of higher education with no break in service.
- 067 - Dismissal for cause.
- 068 - Retirement.
- 069 - Death.

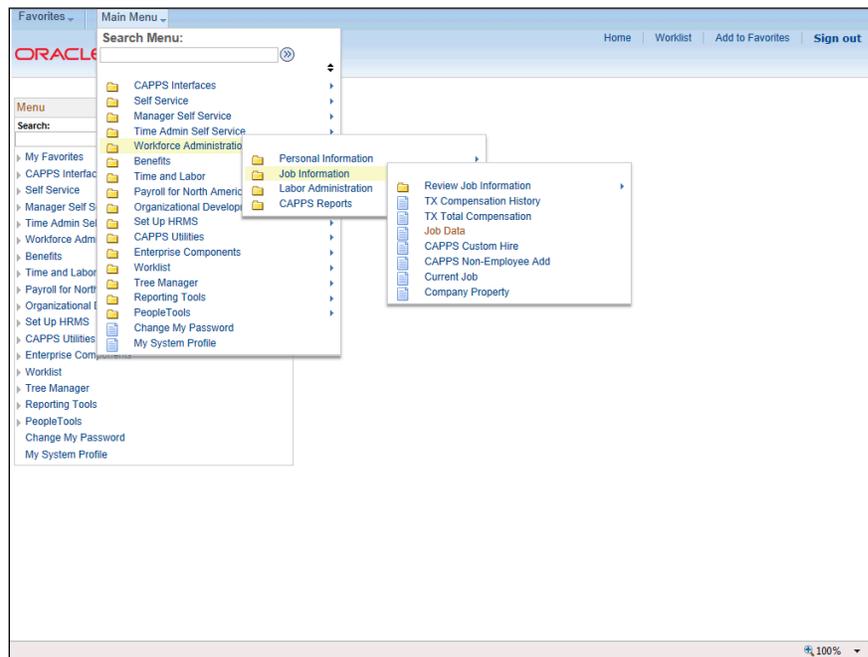
Remember that there may be other business process steps required for a termination, that do not take place in CAPPS. These outside processes are not covered in this CAPPS-specific training.

In this lesson you will learn how to enter a termination due to retirement.

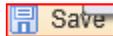
Procedure

When entering a termination, the basic steps followed are the same for each termination type. However, the Reason Code and Effective Date may differ, and additional information may be required.

This lesson demonstrates how to enter a termination for an employee who is retiring.



Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data.</p> 
2.	<p>After a long career with the Texas Baseline Agency, Ms. Temp Orary has decided to retire.</p> <p>Click in the Empl ID field to search for Ms. Orary by ID number.</p> 
3.	<p>Enter "0000000259" into the Empl ID field.</p> 
4.	<p>Press [Enter].</p>
5.	<p>Ms. Orary's Job Data page is displayed.</p> <p>Add a new row to the table for the change you're about to make.</p> <p>Click the Add a new row (Alt+7) button.</p> 
6.	<p>Ms. Orary is retiring on April 30th, the end of the month. Therefore the Effective Date for the termination is May 1, 2015.</p> <p>For other termination types, the Effective Date selected should be one day after the last day for which she was paid.</p> <p>Click the Choose a date (Alt+5) button.</p> 
7.	<p>Remember to select the month and year first, and then the day.</p> <p>Click the Month list.</p> 
8.	<p>Click the May list item.</p> 
9.	<p>Click the 1 link.</p> 

Step	Action
10.	The Effective Date of 5/01/2015 is displayed. Next, open the Action list. Action: <input type="text" value="Position Change"/>
11.	Select Termination from the Action list. Termination
12.	Notice that as soon as you select Termination for your Action , the Last Date Physically Worked is automatically filled in as one day before the Effective Date of the termination.
13.	Next, enter the Reason Code for the termination. Click the Look up Reason Code (Alt+5) button. 
14.	Select the Reason Code of Retirement from the list. Click the 068 link. 068
15.	Scroll to the bottom of the screen to save your work.
16.	Click the Save button. 
17.	Other types of Terminations would be entered the same way, with some minor variations. Remember that there may be other Agency-specific business process steps required for a termination, which do not take place in CAPPS. These outside processes are not covered in this CAPPS-specific training.
18.	Congratulations! You have successfully completed this lesson. End of Procedure.

Job Data Management

Section 3: Job Data Management

Objectives:

- Search for an employee by name or National ID
- Change a Name, Address, Phone Number, or other Personal Data
- View the BRP Indicator

- View Time Reporter Information
- Enter a promotion or reclassification
- Enter a Merit Increase or Equity Adjustment
- Make retro-active or future-dated changes
- Predict and mitigate the impact of changes on Time & Labor

Please note that this training is specific to the CAPPS Human Resources system, and only covers the part of business processes that are performed in the system. Some processes may be affected by outside process steps, documentation requirements, or Agency-specific policies and procedures that are not covered in this training.

Searching for an Employee by Name or National ID

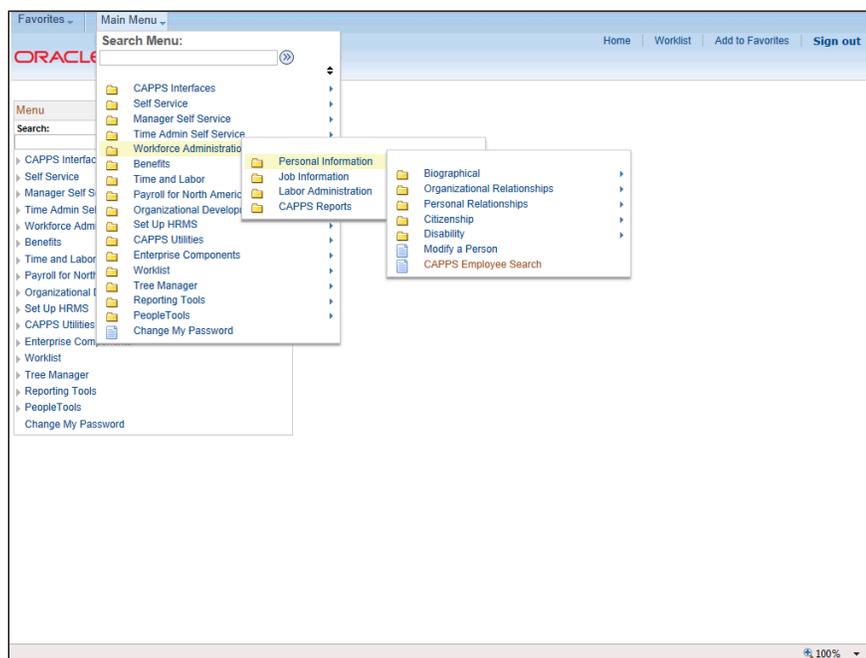
Section 3 Exercises, Lesson 1: Updating Personal Information

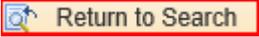
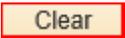
Scenario 1: Searching for an Employee by Name or National ID

Procedure

The customized CAPPS Employee Search can be used to search for an Employee by Empl ID, First Name, Last Name, National ID, or User ID.

This lesson will demonstrate the use of this tool.



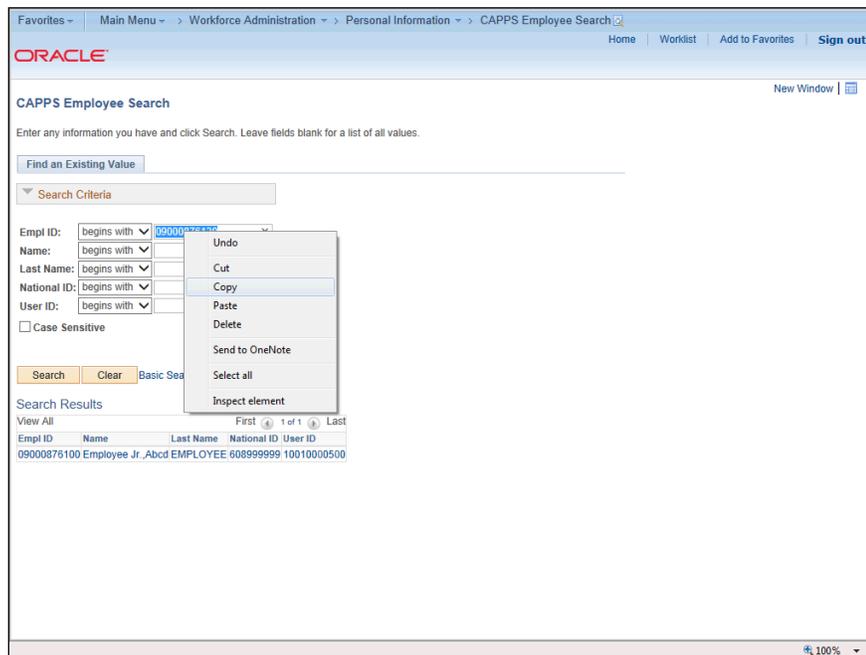
Step	Action
1.	<p>Begin by navigating to the CAPPS Employee Search page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Personal Information > CAPPS Employee Search.</p> 
2.	<p>Let's start by searching for an employee by last name.</p> <p>Click in the Last Name field.</p> 
3.	<p>We're going to search for one of our test people. His last name is "Employee".</p> <p>Enter "Employee" into the Last Name field.</p> 
4.	<p>Click the Search button.</p> 
5.	<p>Everyone with that last name will be listed in the Search Results. Clicking on any piece of data will take you to a summary form for that employee.</p> <p>Click the 09000876100 link.</p> 
6.	<p>This summary gives some basic information about the Employee, which you can use to access other records in CAPPS. We now know Mr. Employee's Employee ID, User ID, and National ID.</p> <p>Information retrieved will be specific to companies you are allowed to access.</p> <p>Click the Return to Search button.</p> 
7.	<p>When you return to the Search screen, Mr. Employee's Empl ID is already displayed. To search for a different person, you must first clear out this information.</p> <p>Click the Clear button.</p> 
8.	<p>Let's search for someone by SSN.</p> <p>Click in the National ID field.</p> 

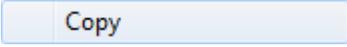
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Step	Action
9.	<p>We know our target's National ID number begins with 6089, but we don't remember the rest.</p> <p>Enter "6089" into the National ID field.</p> <p>National ID: begins with ▾ <input type="text" value="6089"/></p>
10.	<p>Click the Search button.</p> <p><input type="button" value="Search"/></p>
11.	<p>There's only one employee who matches that criteria, so the system takes us there automatically.</p> <p>Click the Return to Search button.</p> <p><input type="button" value="Return to Search"/></p>
12.	<p>Now that we have Mr. Employee's Empl ID, let's copy that number so we can use elsewhere in the system.</p> <p>Double-click in the Empl ID field.</p> <p><input type="text" value="09000876100"/></p>
13.	<p>Right-click in the Empl ID field.</p> <p><input type="text" value="09000876100"/></p>



Step	Action
14.	Click the Copy menu. 
15.	The Employee ID can now be pasted in another application.
16.	Congratulations! You have successfully completed this lesson. End of Procedure.

Changing an Employee's Name and Marital Status

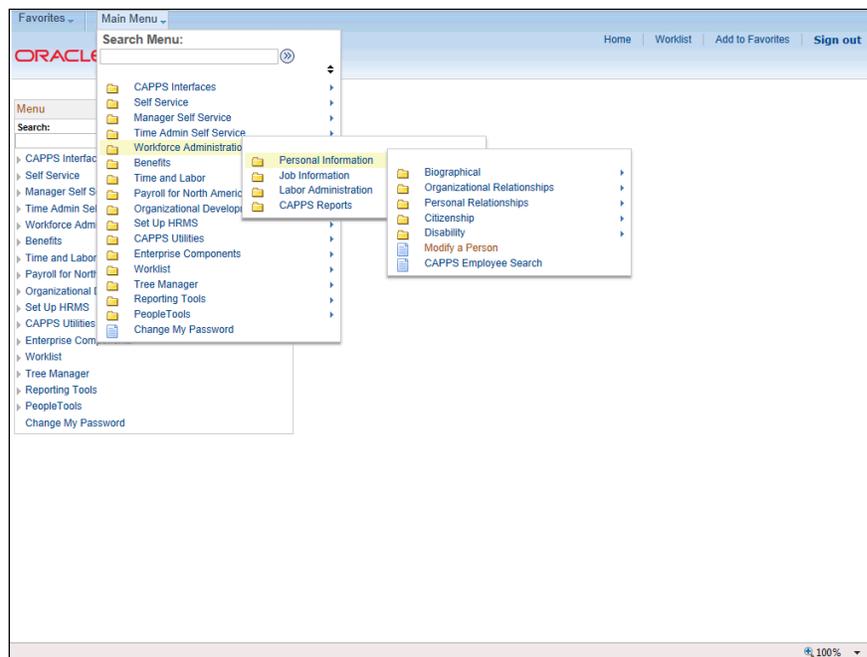
Section 3 Exercises, Lesson 1: Updating Personal Information

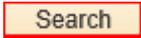
Scenario 2: Changing an Employee's Name and Marital Status

Procedure

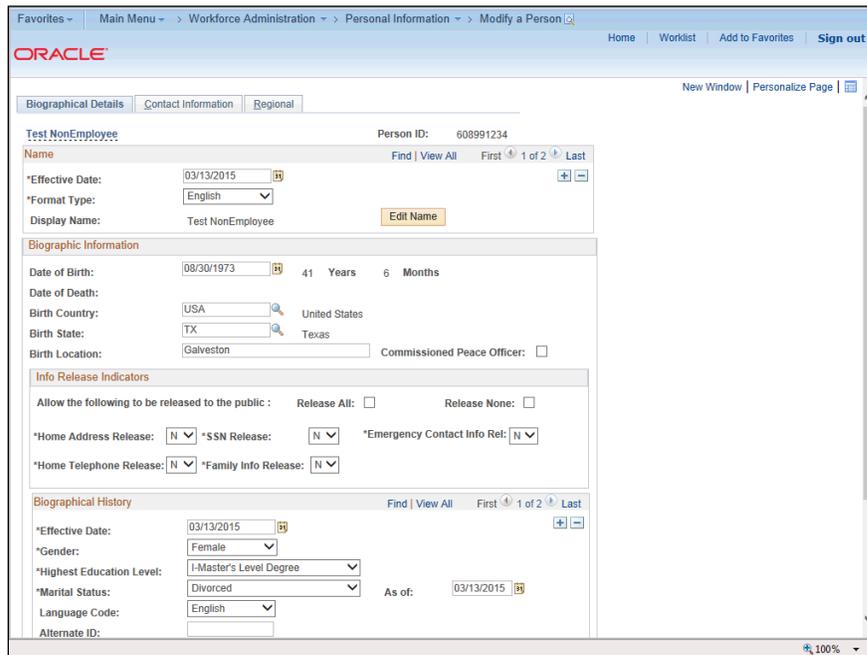
When an employee needs to have their legal name changed in the system, they must submit the proper paperwork to Human Resources. One occasion on which this might happen is when an employee gets married or divorced.

In this lesson, you will learn how to update an employee's name and marital status.



Step	Action
1.	<p>Begin by navigating to the Modify a Person page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Personal Information > Modify a Person.</p> 
2.	<p>Ms. Contingent just married Mr. Non-Employee, and chose to take his name.</p> <p>Click in the Last Name field.</p> 
3.	<p>You can enter all or part of the current last name.</p> <p>Enter "cont" into the Last Name field.</p> 
4.	<p>Click the Search button.</p> 
5.	<p>Click the 608991234 link.</p> 
6.	<p>Since this is a change to existing data, you must first add a new row to the database for the update. This preserves the data history.</p> <p>Click the Add a new row button.</p> 
7.	<p>The displayed name cannot be edited from this screen.</p> <p>Click the Edit Name button.</p> 
8.	<p>Click in the Last Name field.</p> 
9.	<p>Clear out the old value by clicking the X in the Last Name field.</p> 
10.	<p>Enter the employee's new name into the Last Name field.</p> <p>Enter "NonEmployee".</p> 

Step	Action
11.	Click the Refresh Name button to update the display. 
12.	Click the OK button. 



The screenshot shows the Oracle HR/Payroll interface for 'Modify a Person'. The person's name is 'Test NonEmployee' and their Person ID is '608991234'. The 'Name' section includes fields for *Effective Date (03/13/2015), *Format Type (English), and Display Name (Test NonEmployee). The 'Biographic Information' section includes Date of Birth (08/30/1973), Date of Death, Birth Country (USA), Birth State (TX), and Birth Location (Galveston). The 'Info Release Indicators' section has several checkboxes and dropdown menus for releasing information to the public. The 'Biographical History' section includes *Effective Date (03/13/2015), *Gender (Female), *Highest Education Level (I-Master's Level Degree), *Marital Status (Divorced), Language Code (English), and As of (03/13/2015). The 'Marital Status' field is highlighted as being near the bottom of the screen.

Step	Action
13.	The Marital Status field is near the bottom of the screen. Click the scroll bar to move down.

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[Favorites](#) > [Main Menu](#) > [Workforce Administration](#) > [Personal Information](#) > [Modify a Person](#)

[Home](#) | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

ORACLE

Biographic Information

Date of Birth: 08/30/1973 41 Years 6 Months
 Date of Death:
 Birth Country: USA United States
 Birth State: TX Texas
 Birth Location: Galveston Commissioned Peace Officers:

Info Release Indicators

Allow the following to be released to the public: Release All: Release None:
 *Home Address Release: N *SSN Release: N *Emergency Contact Info Rel: N
 *Home Telephone Release: N *Family Info Release: N

Biographical History Find | View All First 1 of 1 Last

*Effective Date: 03/11/2015
 *Gender: Female
 *Highest Education Level: I-Master's Level Degree
 *Marital Status: Divorced As of: 03/11/2015
 Language Code: English
 Alternate ID: Full-Time Student

National ID Personalize | Find | View All First 1 of 1 Last

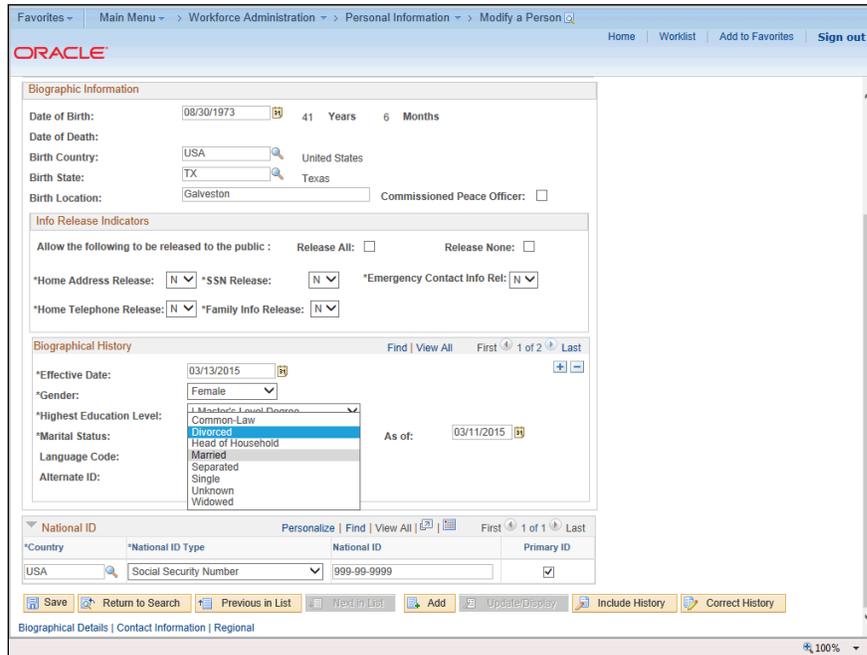
*Country: USA *National ID Type: Social Security Number National ID: 999-99-9999 Primary ID:

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

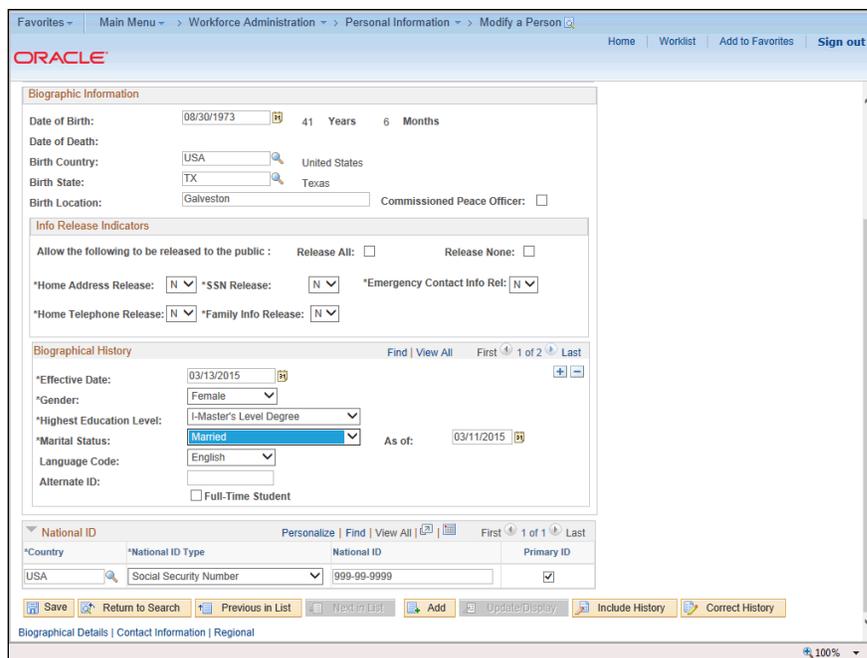
Biographical Details | Contact Information | Regional

ievascripts:submitAction_win0(document.win0,'SICField4\$news0\$S0');

Step	Action
14.	Again, you're making a change to existing data, and the history must be preserved. Click the Add a new row button. 
15.	Click the Marital Status list. *Marital Status: 



Step	Action
16.	Select Married . <div style="border: 1px solid gray; padding: 2px; display: inline-block; background-color: #f0f0f0;">Married</div>



Step	Action
17.	Click the Save button. 
18.	Congratulations, both to you and to the happy couple! You have successfully completed this lesson. End of Procedure.

Changing an Address or Phone Number

Section 3 Exercises, Lesson 1: Updating Personal Information

Scenario 3: Changing an Address or Phone Number

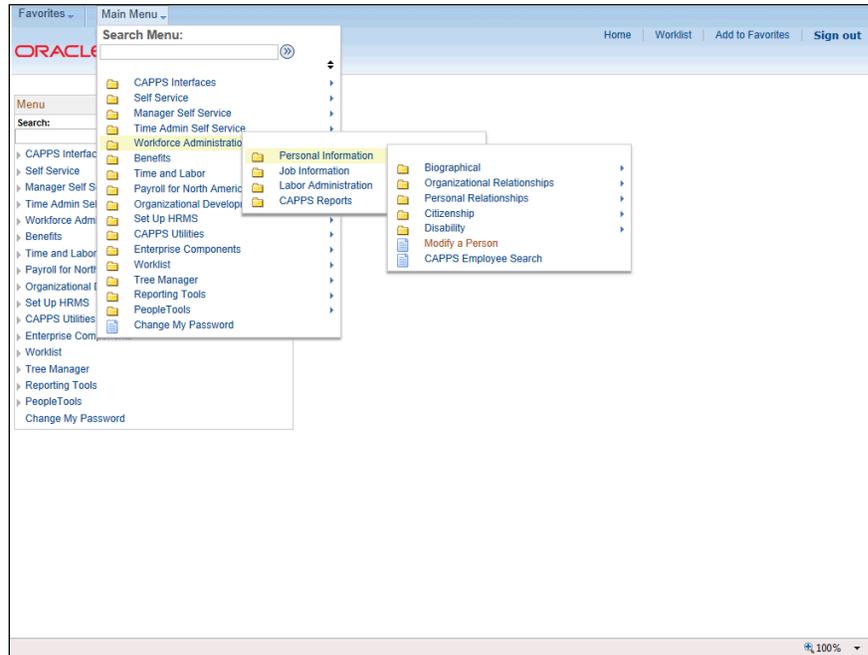
Most changes to personal information such as Address and phone number can be made by the employees themselves through the Employee Self-Service portal. However, occasionally it may be necessary for Human Resources to make these updates for an employee. This lesson demonstrates how those changes can be made in HR.

Procedure

This lesson demonstrates how to make changes to an employee's personal information, if for some reason they cannot be made by the employee through the Employee Self Service portal.

Note that address changes made in CAPPS are not sent to the Employee's Retirement System.

In this lesson, we will update an address and phone number.



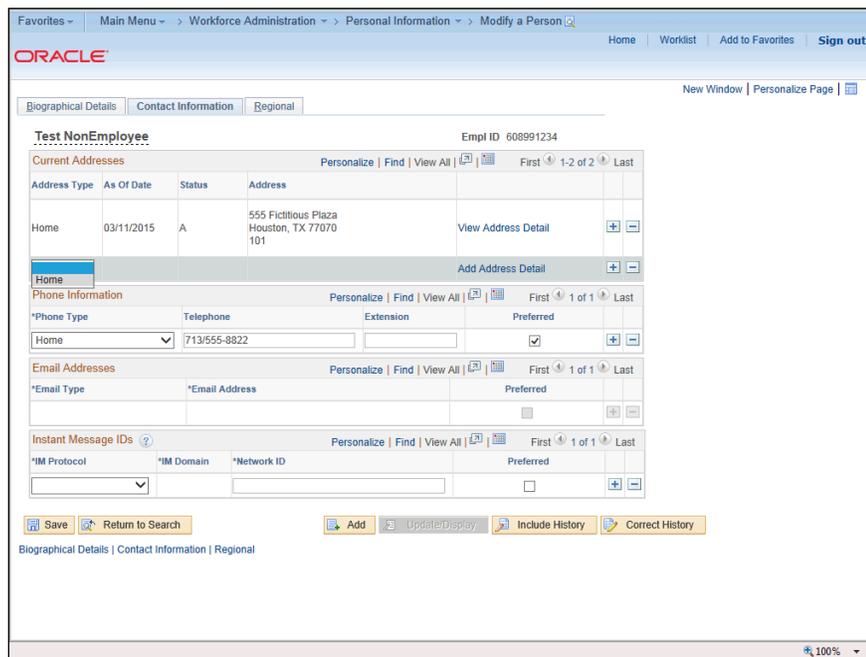
Step	Action
1.	<p>Begin by navigating to the Modify a Person page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Personal Information > Modify a Person.</p> 
2.	<p>Ms. NonEmployee has moved and changed her phone number. Search for her by last name to find her records.</p> <p>Click in the Last Name field.</p> 
3.	<p>Enter at least the first few letters of her last name in the Last Name field.</p> <p>Enter "non".</p> 
4.	<p>Press Enter or click the Search button.</p> 

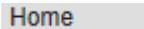
CAPPS HR/PAYROLL

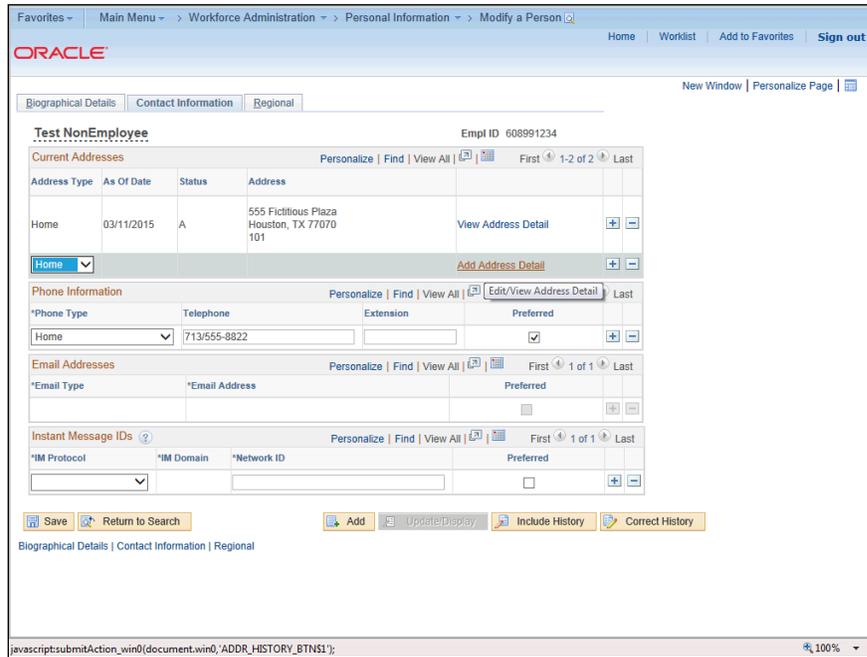
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Step	Action
5.	<p>Ms. NonEmployee's Personal Data page is displayed.</p> <p>Addresses and phone numbers are found on the Contact Information tab.</p> <p>Click the Contact Information tab.</p> 
6.	<p>Add a new row to the table to enter the new information.</p> <p>Click the Add a new row(Alt+7) button.</p> 
7.	<p>On the new row, open the Address Type list.</p> 



Step	Action
8.	<p>Click the Home list item.</p> 



The screenshot shows the Oracle HR/Payroll interface for modifying a person's information. The user is logged in as 'Test NonEmployee' with Empl ID 608991234. The 'Current Addresses' section is active, showing a table with one address: Home, As Of Date 03/11/2015, Status A, Address 555 Fictitious Plaza, Houston, TX 77070 101. The 'Add Address Detail' link is highlighted in red in the original image.

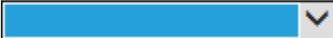
Step	Action
9.	Click the Add Address Detail link. Add Address Detail
10.	Click in the Country field. Country <input type="text"/>
11.	Enter " usa " into the Country field. Country <input type="text"/>
12.	Press [Tab] .
13.	The Add Address link is easy to overlook, so if you click OK by accident and end up on the previous screen with no address entered, you're not alone! Click the Add Address link. Add Address
14.	Click in the Address 1 field. Address 1 <input type="text"/>
15.	Enter " 123 Address Change Street " into the Address 1 field. Address 1 <input type="text"/>
16.	Click in the City field. City <input type="text"/>

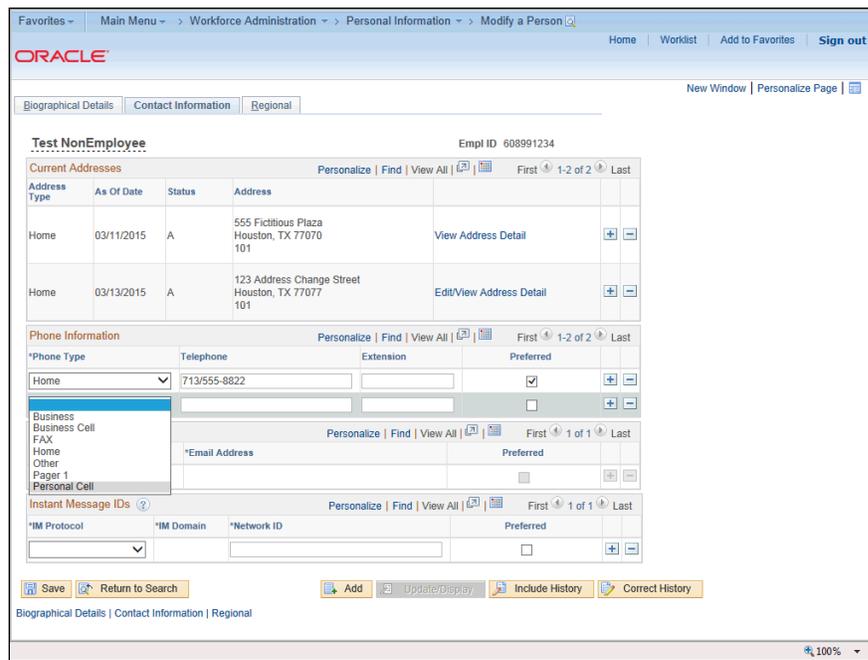
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Step	Action
17.	Enter " Houston " into the City field. City <input type="text"/>
18.	Click in the State field. State <input type="text"/>
19.	Enter " TX " into the State field. State <input type="text"/>
20.	Click in the Postal field. Postal <input type="text"/>
21.	Enter the zip code into the Postal field. Enter " 77077 ". Postal <input type="text"/>
22.	Click in the County field. *County <input type="text"/>
23.	If you know the County Code for Houston, enter it here. If not, click the Look up County (Alt+5) button. 
24.	Houston is located in Harris County. We're going to search for Harris County in the Description field. Click in the Description field. Description: <input type="text" value="begins with"/> <input type="text"/>
25.	Enter " Harris " into the Description field. Description: <input type="text" value="begins with"/> <input type="text"/>
26.	Click the Look Up button. <input type="button" value="Look Up"/>
27.	Click the 101 link to select Harris County. <input type="button" value="101"/>
28.	Click the OK button. <input type="button" value="OK"/>
29.	Double-check the address that appears on the right, and then click the OK button. <input type="button" value="OK"/>

Step	Action
30.	Notice that the address you just entered appears on the second row with a current As Of Date , above, and that the old address is saved for historical purposes.
31.	Next, we're going to add a cell phone number. Click the Add a new row (Alt+7) button. 
32.	Click the Phone Type list. 

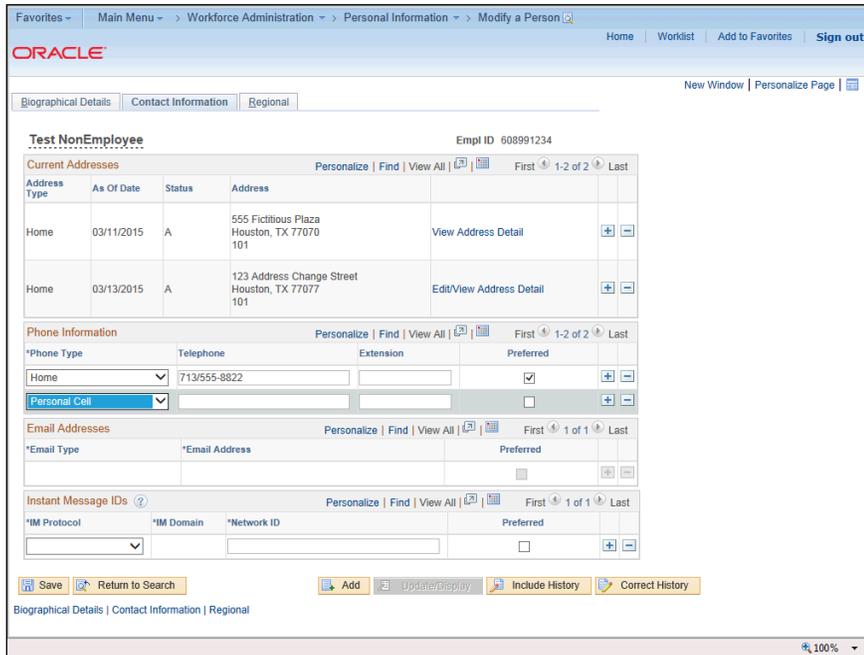


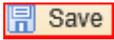
The screenshot shows the Oracle HR/Payroll system interface. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Personal Information > Modify a Person. The page title is "Test NonEmployee" with Empi ID 608991234. The "Current Addresses" table has two rows:

Address Type	As Of Date	Status	Address	Actions
Home	03/11/2015	A	555 Fictitious Plaza Houston, TX 77070 101	View Address Detail
Home	03/13/2015	A	123 Address Change Street Houston, TX 77077 101	Edit/View Address Detail

The "Phone Information" section is active, showing a dropdown for "Phone Type" with a list of options: Business, Business Cell, FAX, Home, Other, Pager 1, and Personal Cell. The "Personal Cell" option is highlighted.

Step	Action
33.	Click the Personal Cell list item. 



Step	Action
34.	Click in the Telephone field. <input type="text"/>
35.	Enter " 2815552255 " into the Telephone field.
36.	Ms. NonEmployee prefers to be contacted by cell phone. Click the Preferred option. <input type="checkbox"/>
37.	Other fields can be updated as needed, following these same guidelines. Click the Save button. 
38.	Congratulations! You have successfully completed this lesson. End of Procedure.

Updating the Information Release Indicator

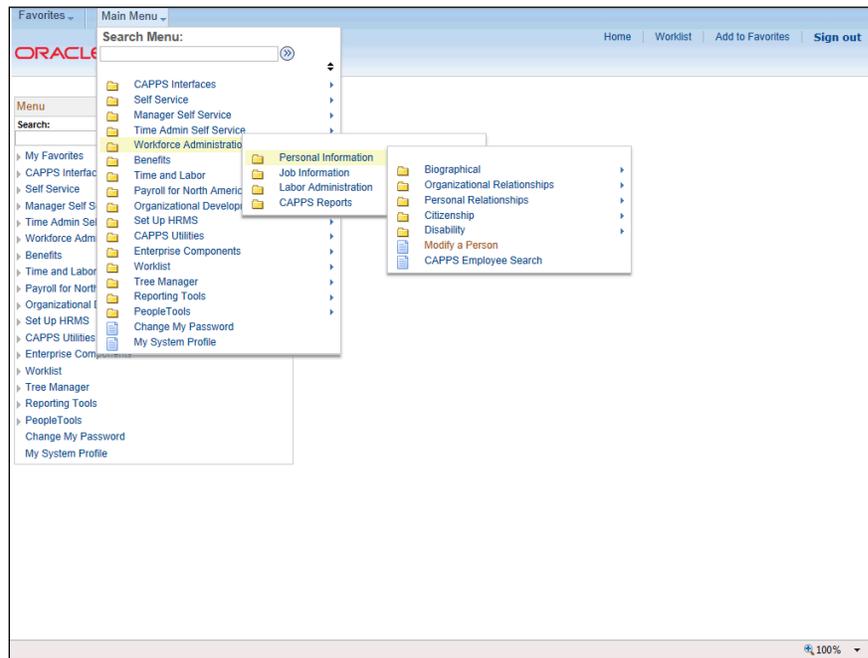
Section 3 Exercises, Lesson 1: Updating Personal Information

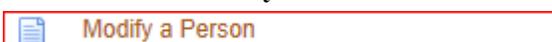
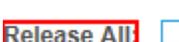
Scenario 4: Updating the Information Release Indicator

Procedure

The Information Release Indicators record whether the employee has authorized the release of certain personal information. They should be set to "Yes" when the employee is hired, but can be changed at the employee's request, or by the employee through Employee Self Service.

This exercise will demonstrate where to find these indicators and how to update them.



Step	Action
1.	<p>Begin by navigating to the Modify a Person page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Personal Information > Modify a Person.</p> <p></p>
2.	<p>Search for the person you're updating.</p> <p>Enter "0000000012" into the Empl ID field, and press Enter.</p> <p>Empl ID: begins with ▼ </p>
3.	<p>There is a separate indicator for each type of information to be released or protected. HR should set this value to the "Release All" option. Employees can change their own individual settings in Employee Self Service.</p> <p>Click the Release All option.</p> <p></p>

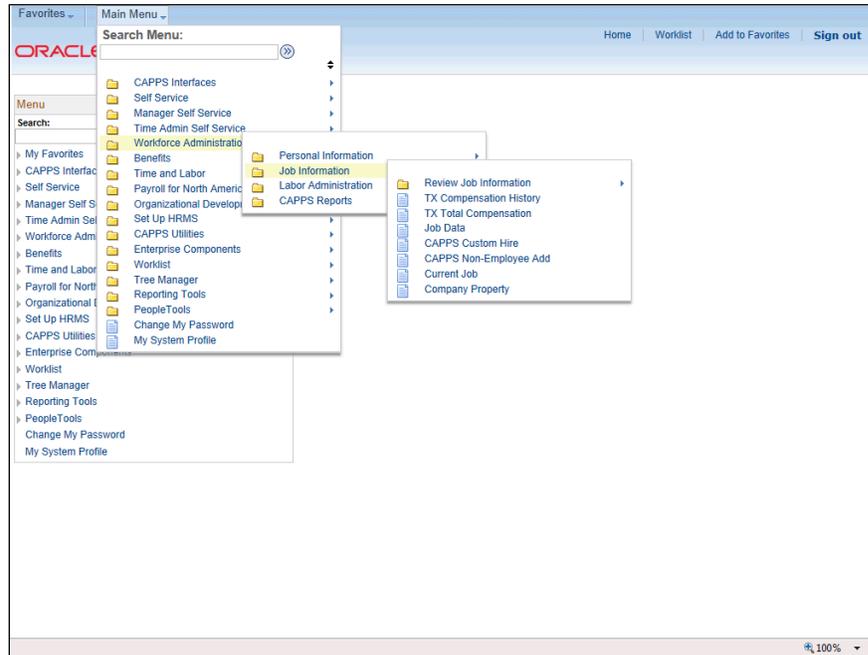
Step	Action
4.	All the indicators are now set to "Y", which means information may be released. Click the Release None option. Release None: 
5.	All of the indicators are now set to "N". No information will be released.
6.	Notice the checkbox for the Commissioned Peace Officer . If this box is checked, no information should ever be released.
7.	Be sure to save your updates before you leave. The Save button is at the bottom of the screen. Click the scrollbar.
8.	Click the Save button. 
9.	You'll know your changes were successfully saved when you see this confirmation.
10.	Click the Home link to return to the Main Menu. 
11.	Congratulations! You have successfully completed this lesson. End of Procedure.

Viewing the BRP Indicator and Time Reporter Data

Section 3 Exercises, Lesson 2: Viewing the BRP Indicator and Time Reporter Information

Procedure

Links to the Benefit Replacement Pay (BRP) Indicator and the Time Reporter Data screen are found together on the same page. This exercise will demonstrate where to find these links and what information they hold.



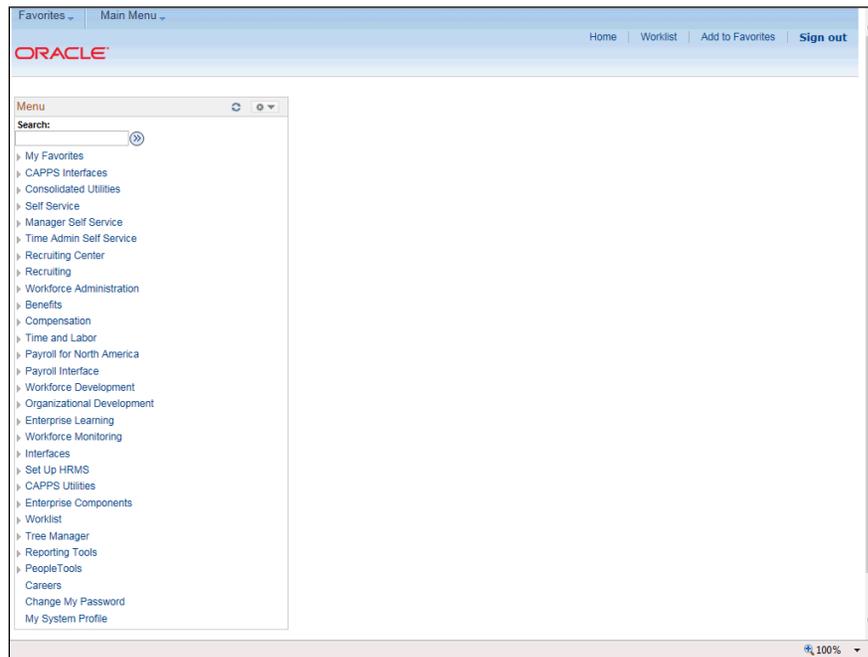
Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data.</p> 
2.	<p>Many options are available when searching for the employee. For example, if you know the last part of the Empl ID but not the first, you can change the search parameters.</p> <p>Click the Empl ID list.</p> <p>Empl ID: </p>
3.	<p>"Contains" means that the value you give can be anywhere within the ID.</p> <p>Click the contains list item.</p> 
4.	<p>Click in the Empl ID field.</p> <p>Empl ID: </p>

Step	Action
5.	<p>You know that the Empl ID ends with 0001.</p> <p>Enter "0001" into the Empl ID field.</p> <p>Empl ID: contains ▼ <input type="text" value="0001"/></p>
6.	<p>Click the Search button.</p> <p><input type="button" value="Search"/></p>
7.	<p>Search results appear below. You may have to scroll down to find them if you're using a smaller monitor.</p> <p>Click the 0000000001 link.</p> <p><input type="text" value="0000000001"/></p>
8.	<p>The indicators we're looking for are on the Employment Data screen.</p> <p>Click the Employment Data link at the very bottom of the page. Scroll down to it if necessary.</p> <p>Employment Data</p>
9.	<p>Notice that both the Time Reporter Data link and the Employee BRP Indicator link are located on the right, near the middle of the page.</p> <p>Click the Time Reporter Data link.</p> <p><input type="text" value="Time Reporter Data"/></p>
10.	<p>Time Reporter Data tells you how the employee is set up in the Time & Labor module. This screen is for reference only, and cannot be edited from here.</p> <p>For more information about this data, see the Time & Labor training materials.</p>
11.	<p>Click the scroll bar to scroll downward.</p>
12.	<p>Click the OK button.</p> <p><input type="button" value="OK"/></p>
13.	<p>Click the Employee BRP Indicator link.</p> <p><input type="text" value="Employee BRP Indicator"/></p>
14.	<p>The current BRP setting is displayed on this screen. This screen is also view-only, and cannot be changed here.</p>
15.	<p>Click the OK button.</p> <p><input type="button" value="OK"/></p>
16.	<p>Click the Home link if you wish to exit.</p> <p><input type="text" value="Home"/></p>

Step	Action
17.	Congratulations! You have successfully completed this lesson. End of Procedure.

Viewing Total Compensation Procedure

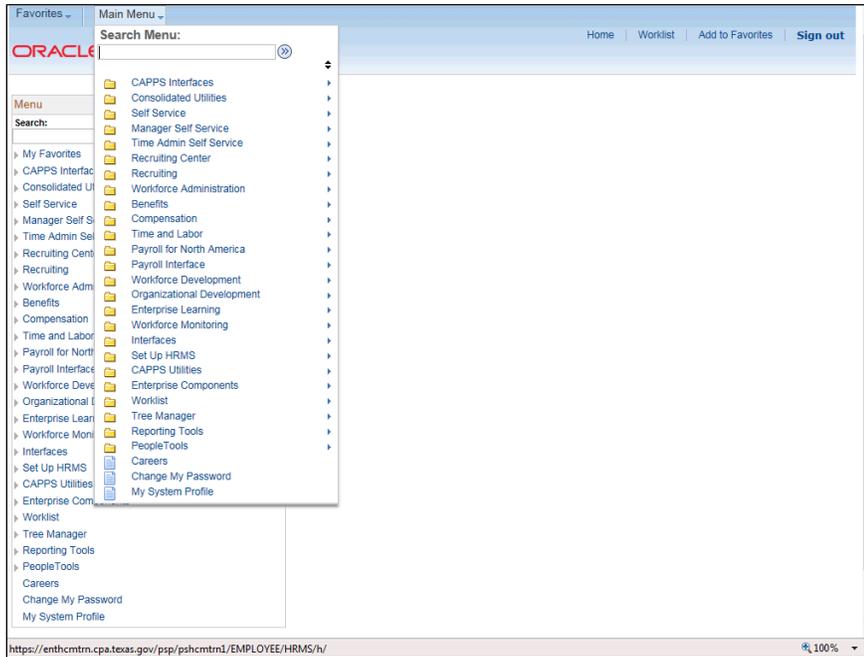
In the lesson you will learn how to view an employee's Total Compensation.

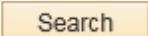


Step	Action
1.	Click the Main Menu link. Main Menu

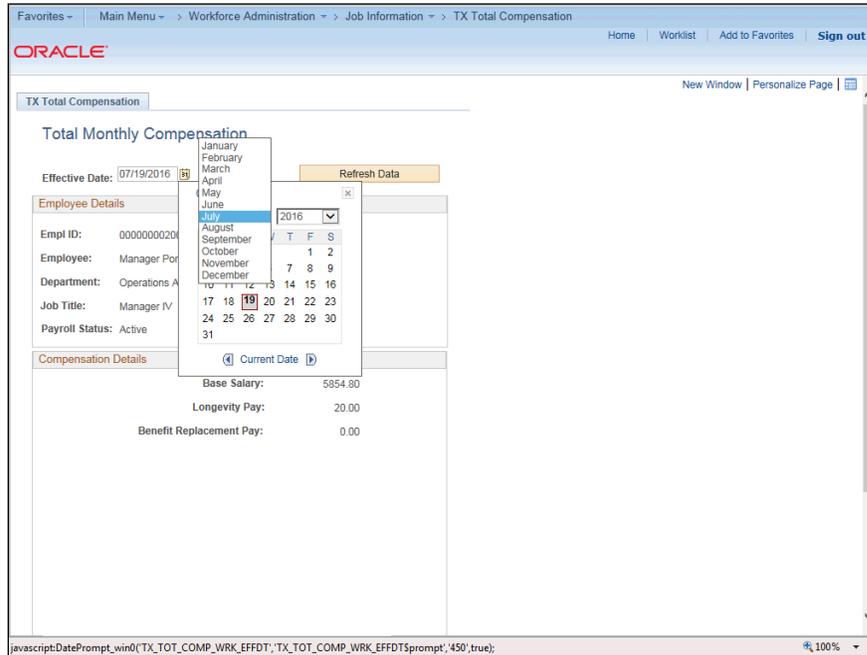
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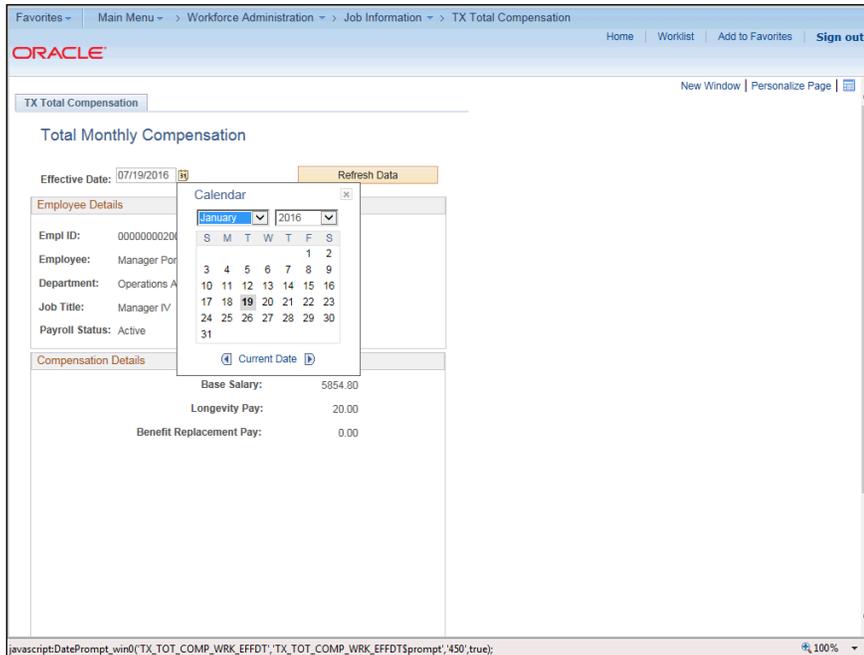


Step	Action
2.	Click the Workforce Administration menu. 
3.	Click the Job Information menu. 
4.	Click the TX Total Compensation menu. 
5.	In this example, you are searching by the Employee ID. Enter the desired information into the begins with field. Enter " 0000000200 ". begins with <input data-bbox="467 1461 745 1497" type="text"/>
6.	Click the Search button. 
7.	The date will default to the current date. You may change it as needed. For this example, you will use 1/1/2016. Click the Choose a date (Alt+5) button. 

Step	Action
8.	Click the list. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> July ▼ </div>



Step	Action
9.	Click the January list item. January



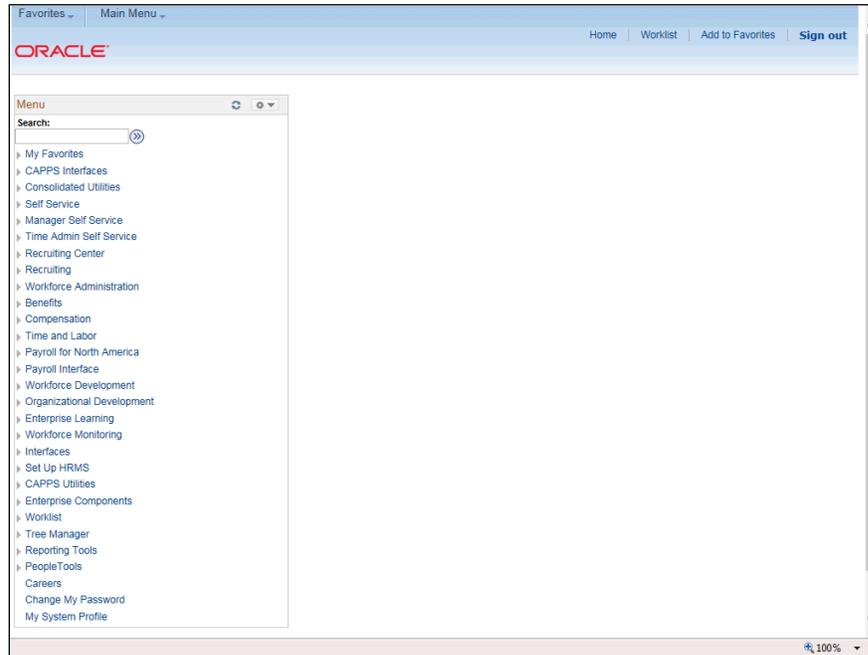
Step	Action
10.	Click the 1 link. 
11.	Click the Refresh Data button. 
12.	Click the Vertical Scrollbar .
13.	The Total Compensation will change based on the date selected. As an example, a different longevity amount may be calculated based on what the employee is eligible for based on the effective date selected. In addition, a promotion and/or salary change would result in a different base salary depending on the effective date selected.
14.	Congratulations! You have successfully completed this lesson. End of Procedure.

Viewing Compensation History

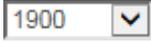
Procedure

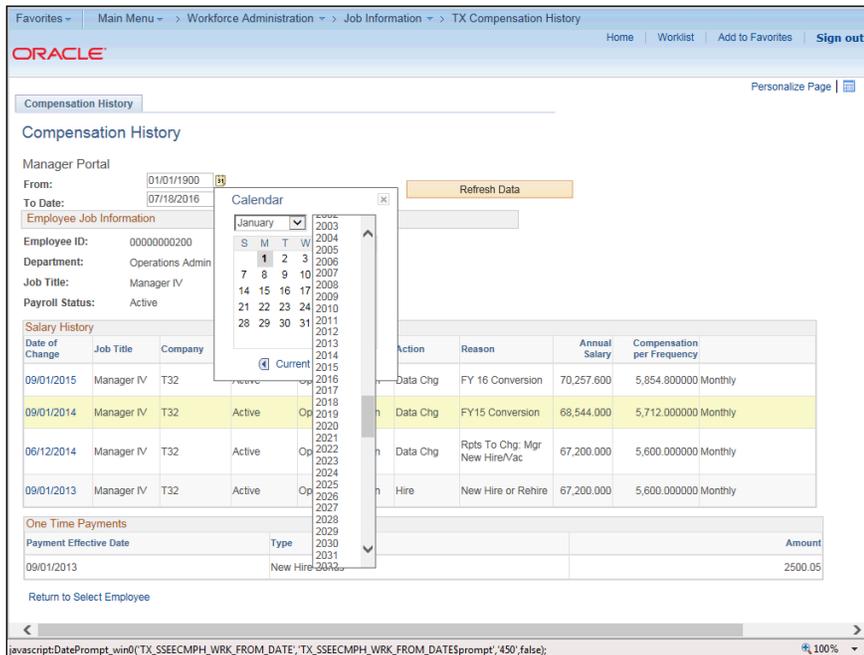
A core HR user may be required to view an employee's compensation history.

This lesson shows you how to view **Compensation History**.



Step	Action
1.	Click the Main Menu button. 
2.	Click the Workforce Administration menu. 
3.	Click the Job Information menu. 
4.	Click the TX Compensation History menu. 
5.	Enter the desired information into the begins with field. Enter " 0000000200 ". begins with <input data-bbox="565 1507 841 1541" type="text"/>
6.	Click the Search button. 
7.	The Salary History box shows Date of Change, Job Title, Company, Empl Status, Department, Action, Reason, Annual Salary and Compensation per Frequency . The bottom of the page also shows One Time Payments , as applicable.

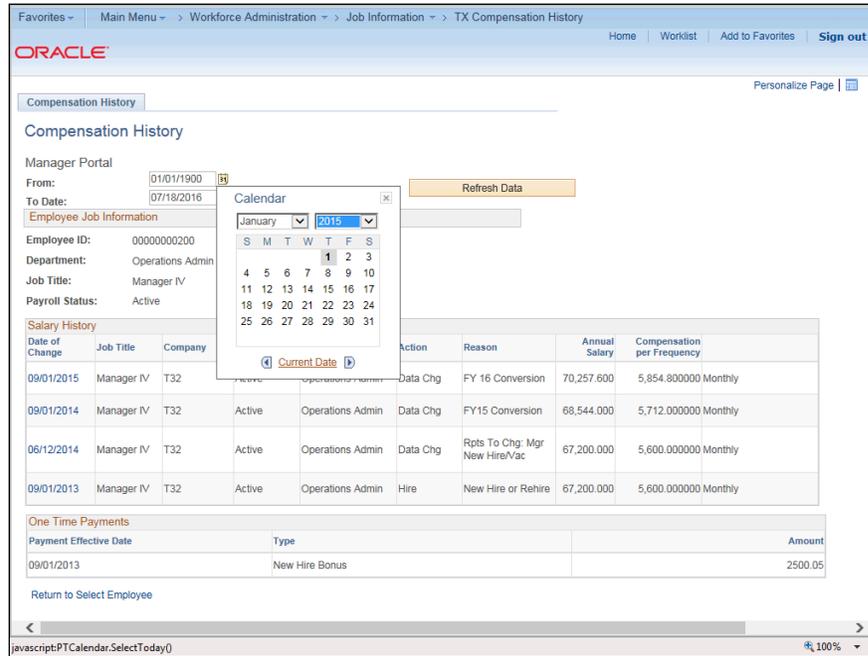
Step	Action
8.	The From and To Dates default on this page. These dates can be changed to reflect a specific time period.
9.	Change the date range to view Compensation History From 1/1/2015 to Date 12/31/2015. In this field you will select 1/1/2015. Click the Choose a date (Alt+5) button. 
10.	Click the list. 
11.	Click the Vertical Scrollbar . 



The screenshot shows the Oracle CAPPS HR/PAYROLL interface. The main content area is titled 'Compensation History'. It includes a 'Manager Portal' section with fields for 'From' (01/01/1900) and 'To Date' (07/18/2016). Below this is the 'Employee Job Information' section, which lists details for Employee ID 0000000200, Department Operations Admin, and Job Title Manager IV. The 'Salary History' table is the primary focus, showing records for various dates and compensation amounts. A calendar pop-up is overlaid on the 'From' date field, with the year 2015 selected. The table below shows the following data:

Date of Change	Job Title	Company	Action	Reason	Annual Salary	Compensation per Frequency
09/01/2015	Manager IV	T32	Data Chg	FY 16 Conversion	70,257.600	5,854.800000 Monthly
09/01/2014	Manager IV	T32	Data Chg	FY15 Conversion	68,544.000	5,712.000000 Monthly
06/12/2014	Manager IV	T32	Data Chg	Rpts To Chg: Mgr New Hire/Vac	67,200.000	5,600.000000 Monthly
09/01/2013	Manager IV	T32	Hire	New Hire or Rehire	67,200.000	5,600.000000 Monthly

Step	Action
12.	Click the 2015 list item. 



Step	Action
13.	Click the 1 link. 
14.	In the To Date you will select 12/31/2015. Click the Choose a date (Alt+5) button. 
15.	Click the list. 

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Oracle Compensation History interface showing a calendar dropdown menu. The calendar is open for December 2016, with the 18th selected. The main table displays compensation history for Employee ID 0000000200, including data changes and a new hire.

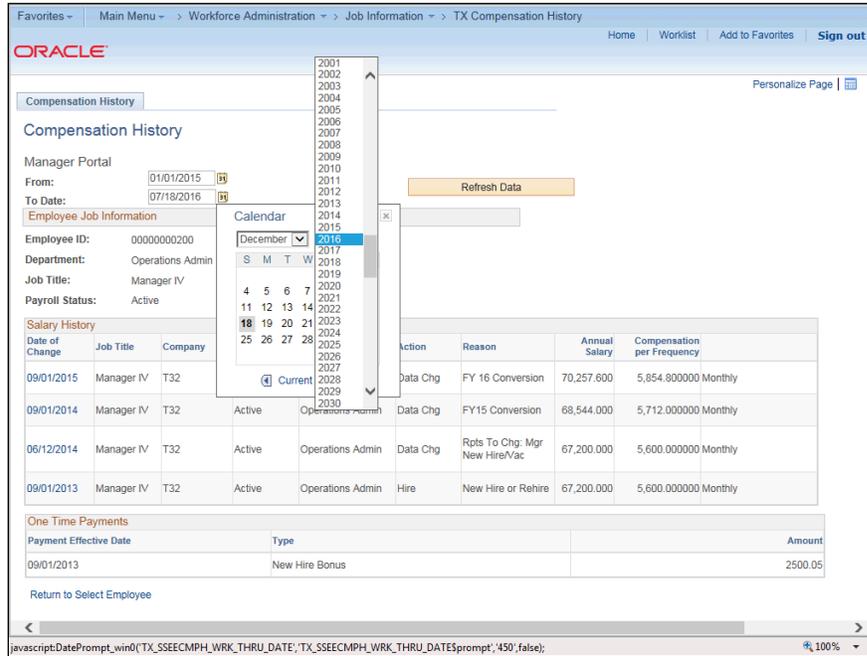
Date of Change	Job Title	Company	Action	Reason	Annual Salary	Compensation per Frequency		
09/01/2015	Manager IV	T32	Data Chg	FY 16 Conversion	70,257.600	5,854.800000 Monthly		
09/01/2014	Manager IV	T32	Active	Operations Admin	Data Chg	FY15 Conversion	68,544.000	5,712.000000 Monthly
06/12/2014	Manager IV	T32	Active	Operations Admin	Data Chg	Rpts To Chg: Mgr New Hire/Vac	67,200.000	5,600.000000 Monthly
09/01/2013	Manager IV	T32	Active	Operations Admin	Hire	New Hire or Rehire	67,200.000	5,600.000000 Monthly

Step	Action
16.	Click the December list item.

Oracle Compensation History interface showing a calendar dropdown menu. The calendar is open for December 2016, with the 18th selected. The main table displays compensation history for Employee ID 0000000200, including data changes and a new hire.

Date of Change	Job Title	Company	Action	Reason	Annual Salary	Compensation per Frequency		
09/01/2015	Manager IV	T32	Data Chg	FY 16 Conversion	70,257.600	5,854.800000 Monthly		
09/01/2014	Manager IV	T32	Active	Operations Admin	Data Chg	FY15 Conversion	68,544.000	5,712.000000 Monthly
06/12/2014	Manager IV	T32	Active	Operations Admin	Data Chg	Rpts To Chg: Mgr New Hire/Vac	67,200.000	5,600.000000 Monthly
09/01/2013	Manager IV	T32	Active	Operations Admin	Hire	New Hire or Rehire	67,200.000	5,600.000000 Monthly

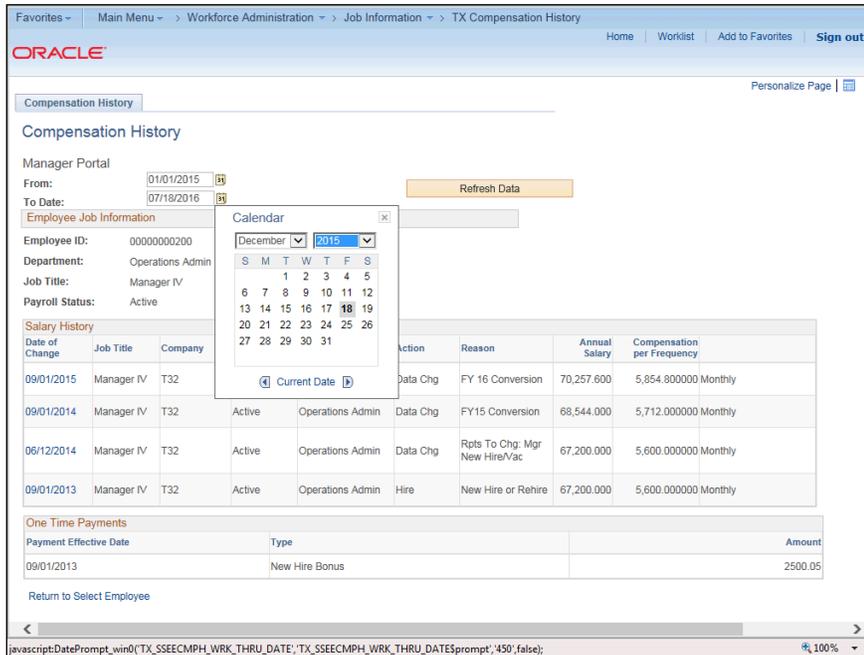
Step	Action
17.	Click the list. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> 2016 ▼ </div>



Oracle Compensation History page showing a calendar dropdown for 2016 and a table of compensation history.

Date of Change	Job Title	Company	Action	Reason	Annual Salary	Compensation per Frequency
09/01/2015	Manager IV	T32	Data Chg	FY 16 Conversion	70,257.600	5,854.800000 Monthly
09/01/2014	Manager IV	T32	Data Chg	FY15 Conversion	68,544.000	5,712.000000 Monthly
06/12/2014	Manager IV	T32	Data Chg	Rpts To Chg: Mgr New Hire/Vac	67,200.000	5,600.000000 Monthly
09/01/2013	Manager IV	T32	Hire	New Hire or Rehire	67,200.000	5,600.000000 Monthly

Step	Action
18.	Click the 2015 list item. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> 2015 </div>



The screenshot shows the Oracle CAPPS HR/PAYROLL system interface. The main content area is titled "Compensation History". It includes a "Manager Portal" section with date pickers for "From:" (01/01/2015) and "To Date:" (07/18/2016), and a "Refresh Data" button. Below this is the "Employee Job Information" section with fields for Employee ID, Department, Job Title, and Payroll Status. The "Salary History" section contains a table with columns for Date of Change, Job Title, Company, Action, Reason, Annual Salary, and Compensation per Frequency. A calendar pop-up is open over the table, showing the month of December 2015, with the 31st highlighted. The "One Time Payments" section shows a table with columns for Payment Effective Date, Type, and Amount.

Step	Action
19.	Click the 31 link. 
20.	You must use the Refresh Data button to refresh the Salary History according to the date range entered. Click the Refresh Data button. 
21.	The Salary History list has changed accordingly. More details can be viewed by selecting the Date of Change. Click the 09/01/2015 link. 
22.	After reviewing the Salary Change details, you must close this page. Click the Close button. 
23.	Click the Home link. 

Step	Action
24.	Congratulations! You have successfully completed this lesson. End of Procedure.

Promoting an Employee

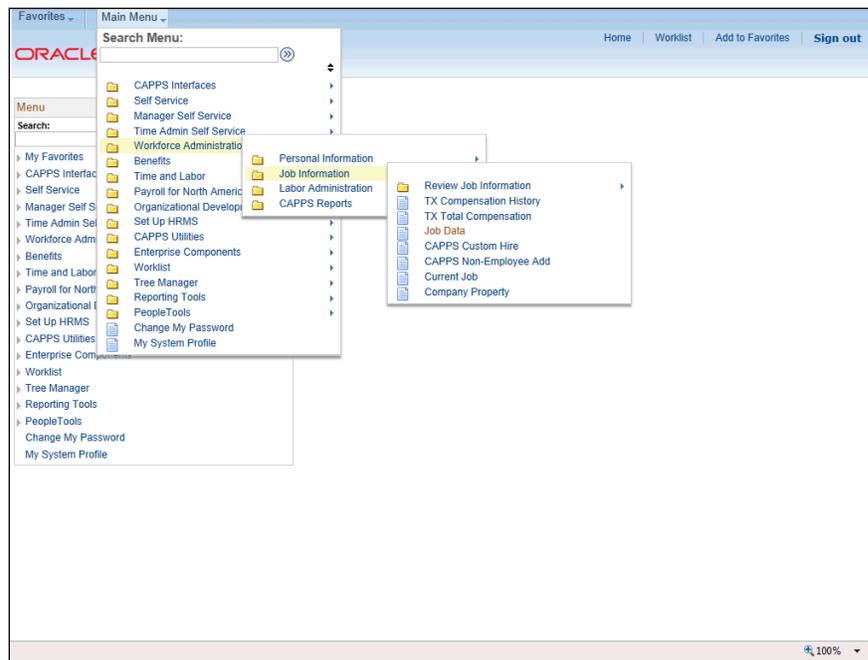
Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 1: Promoting an Employee

Procedure

When an employee gets promoted, HR changes their position number and compensation.

This lesson demonstrates the process for promoting an employee and changing their compensation.



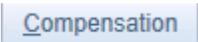
Step	Action
1.	Begin by navigating to the Job Data page. The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data.  Job Data

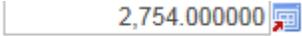
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Step	Action
2.	<p>Ms. Temp Orary has earned a promotion! Let's look her up by Employee ID number.</p> <p>Click in the Empl ID field.</p> <p>Empl ID: <input type="text" value="begins with"/> <input type="text"/></p>
3.	<p>Enter "0000000259" into the Empl ID field.</p> <p>Empl ID: <input type="text" value="begins with"/> <input type="text"/></p>
4.	<p>Click the Search button.</p> <p><input type="button" value="Search"/></p>
5.	<p>Ms. Orary's Job Data displays.</p> <p>Insert a new Effective Dated row to record the change to her Job Data.</p> <p>Click the Add a new row (Alt+7) button.</p> <p><input type="button" value="+"/></p>
6.	<p>Ms. Orary's promotion will be effective April 1, 2015.</p> <p>Click the Choose a date (Alt+5) button.</p> <p><input type="button" value="31"/></p>
7.	<p>Open the Month list and select April.</p> <p><input type="text" value="April"/></p>
8.	<p>Click the 1 link.</p> <p><input type="text" value="1"/></p>
9.	<p>The Effective Date is displayed.</p> <p>Next, select the Action and Reason for this change.</p> <p>Click the Action list.</p> <p>Action: <input type="text" value="Data Change"/></p>
10.	<p>Select Promotion from the Action list.</p> <p><input type="text" value="Promotion"/></p>
11.	<p>Click the Look up Reason Code (Alt+5) button.</p> <p><input type="button" value="🔍"/></p>

Step	Action
12.	Select the code for Promotion . Click the 020 link. 
13.	Then, change the Position Number . Click in the Position Number field. Position Number: 
14.	To clear the old data out of the Position Number field, click on the X. Position Number: 
15.	Enter " 00005478 " into the Position Number field. Position Number: 
16.	Information about the new position will populate when you press the Tab key. Press [Tab] .
17.	Notice that the new position information has been populated. Click the Job Information tab. 
18.	Verify that the new Job Information has been entered correctly. Click the Payroll tab. 
19.	Verify that the Payroll setup is correct. Click the Salary Plan tab. 
20.	Verify the Salary Plan information, and make a note of the Plan and Grade level. Click the Compensation tab. 

Step	Action
21.	<p>Verify that the salary you are about to enter falls within the range of the Plan and Grade for this position, and then enter the monthly salary in the Compensation field.</p> <p>Click in the Comp Rate field.</p> 
22.	Enter " 3000 " into the Comp Rate field.
23.	<p>You must click the Calculate Compensation button or the compensation will not be correctly calculated and saved.</p> <p>Click the Calculate Compensation button.</p> 
24.	<p>Click the Save button.</p> 
25.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Demoting an Employee

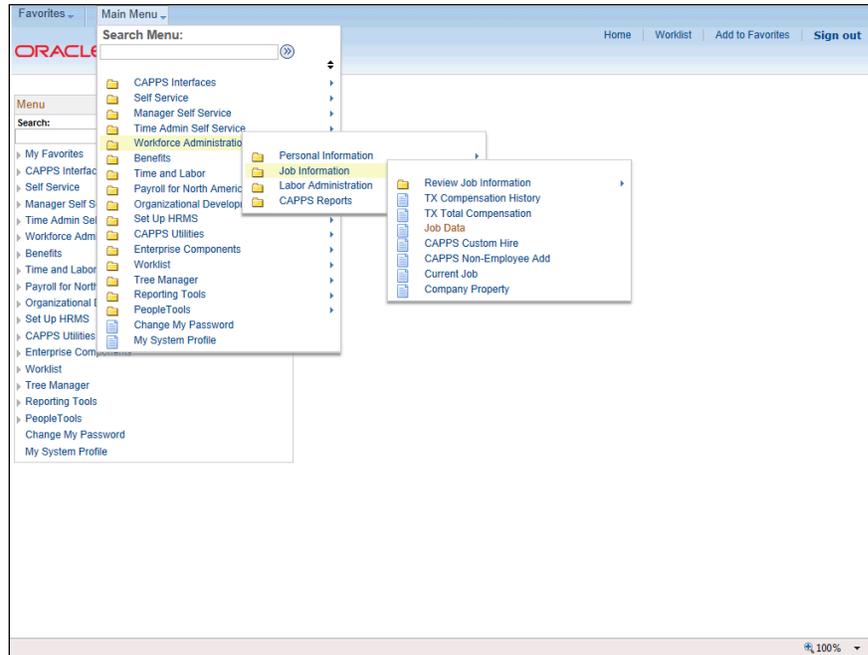
Section 3 Exercises, Lesson 3: Position and Job Data Changes

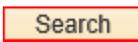
Scenario 2: Demoting an Employee

Procedure

The process for demoting an employee is similar to that for promoting. It involves changing to a position number with a different Job Code and compensation rate.

This lesson will demonstrate entering a demotion.

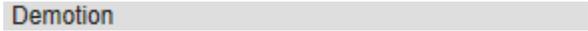
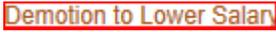


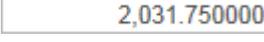
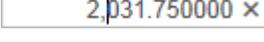
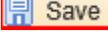
Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data</p> 
2.	<p>Test Employee T is being demoted to a different position and lower compensation rate. Search for the employee by ID number.</p> <p>Enter "0000000012" into the Empl ID field.</p> <p>Empl ID: begins with ▼ </p>
3.	<p>Click the Search button.</p> 
4.	<p>The employee's Job Data is displayed.</p> <p>Add a new row for the change you're about to enter.</p> <p>Click the Add a new row (Alt+7) button.</p> 

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Step	Action
5.	<p>This demotion will take effect on April 1, 2015.</p> <p>Click the Choose a date (Alt+5) button.</p> 
6.	<p>Open the month list.</p> 
7.	<p>Select April.</p> 
8.	<p>Click the 1 link.</p> 
9.	<p>The Effective Date is displayed.</p> <p>Next, select the appropriate Action and Reason codes.</p> <p>Click the Action list.</p> <p>Action: </p>
10.	<p>Select Demotion from the Action list.</p> 
11.	<p>Click the Look up Reason Code (Alt+5) button.</p> 
12.	<p>Select the Demotion to Lower Salary Reason code.</p> 
13.	<p>Next, update the Position Number.</p> <p>Click in the Position Number field.</p> <p>Position Number: </p>
14.	<p>Click the X in the Position Number field to clear out the previous value.</p> <p>Position Number: </p>
15.	<p>Enter the new Position Number into the Position Number field.</p> <p>Enter "00005253".</p> <p>Position Number: </p>

Step	Action
16.	Data about the new position will populate the Work Location tab as soon as you press the Tab key. Press [Tab] .
17.	Verify that the Job Data has populated correctly, and then click the Job Information tab. 
18.	Verify the data on the Job Information tab and then click the Payroll tab. 
19.	Verify the information on the Payroll tab, and then go to the Salary Plan tab. 
20.	Make a note of the Salary Plan and Grade , and then click the Compensation tab. 
21.	Validate that the salary amount you are about to enter falls within the range for the Salary Plan and Grade , and then click in the Comp Rate field. 
22.	Click the X in the Comp Rate field to clear out the existing data. 
23.	Enter the new compensation into the Comp Rate field. Enter " 2000 ".
24.	As always, click the Calculate Compensation button before saving your work. 
25.	Click the Save button. 
26.	Congratulations! You have successfully completed this lesson. End of Procedure.

Temporary Assignments

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 4: Temporary Assignments

Procedure

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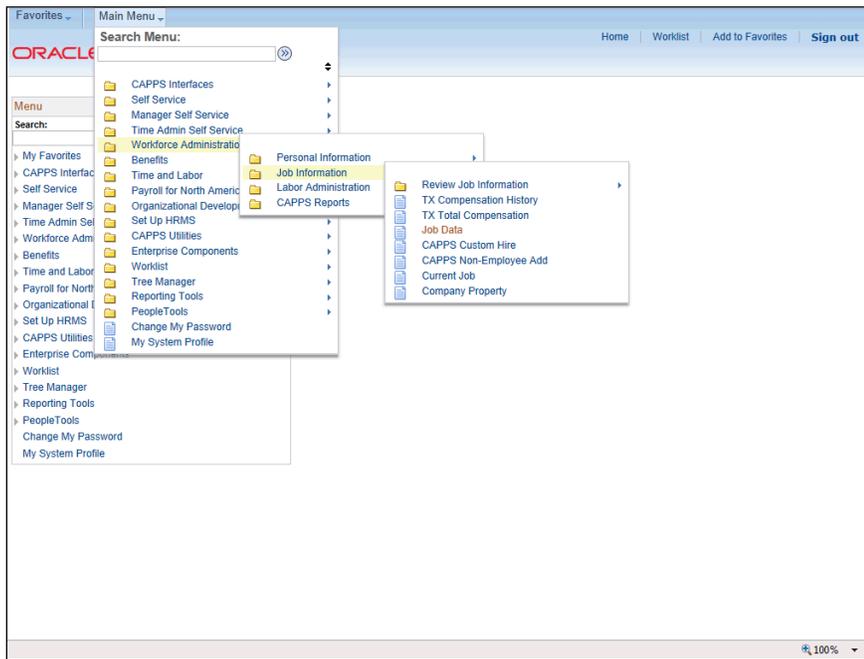
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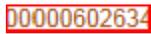
When an employee is put on Temporary Assignment, a row is entered to change their position at the beginning of the assignment and again at the end.

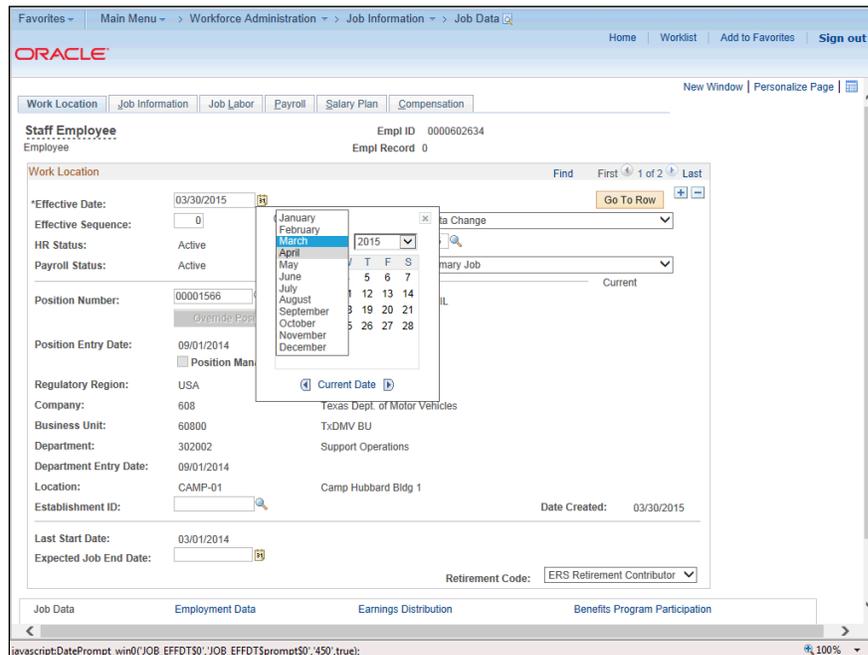
The entries for a temporary assignment are basically the same as other assignment changes, such as a transfer to another Agency or a move to a different position. For each of these changes, the Action and Reason Code indicate what type of transaction is being entered.

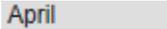
In this lesson, you will learn how to enter a row for the beginning and for the end of a Temporary Assignment.

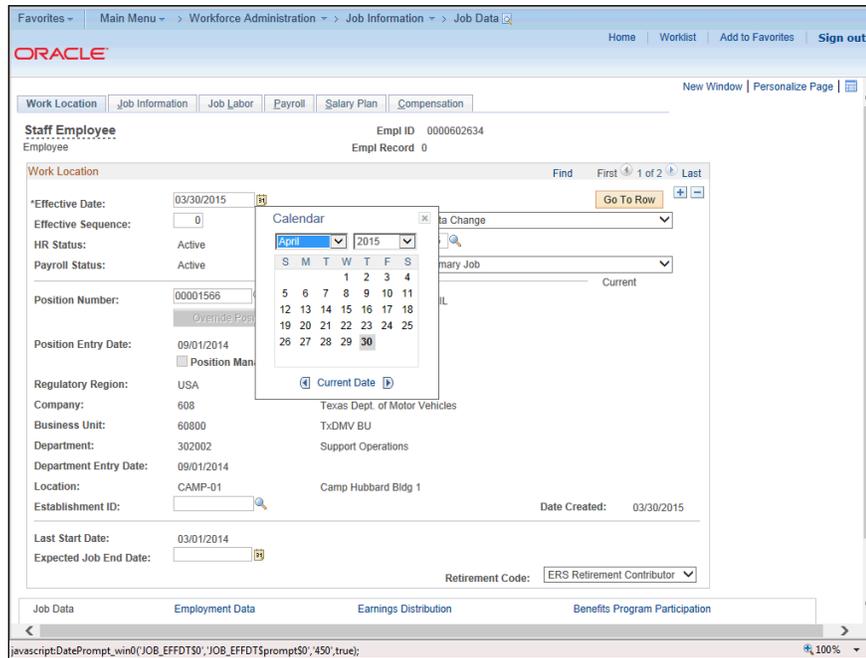


Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data.</p> 
2.	<p>Mr. Staff Employee is currently an Administrative Assistant II, and he will be filling in for another employee who is going on leave for a month. Search for Mr. Employee by last name.</p> <p>Click in the Last Name field.</p> <p>Last Name: begins with ▼ </p>

Step	Action
3.	Enter " Employee " into the Last Name field, and press [Enter] . 
4.	Search Results appear at the bottom of the screen. Click the scrollbar.
5.	Click the 0000602634 link to select Staff Employee. 
6.	Each change must be entered on a new row, to maintain the history of the employee. Click the Add a new row (Alt+7) button. 
7.	The temporary assignment is scheduled to begin on April 1, 2015. Click the Choose a date (Alt+5) button. 
8.	Open the Month list. 



Step	Action
9.	Select April . 



Step	Action
10.	Click the 1 link. 
11.	The Effective Date is displayed. Next, we will select the appropriate Action and Reason Code . The Action Code for a Temporary Assignment is Data Change . By default, the screen displays the last action taken on this employee's record, which also happens to be a Data Change. So this time, we don't need to change the Action . Click the Look up Reason Code (Alt+5) button. 
12.	Select Temporary Assignment Start from the Reason list. 

Step	Action
13.	<p>Next, we will change Mr. Employee's Position Number to reflect the temporary assignment.</p> <p>Click in the Position Number field.</p> <p>Position Number: <input type="text" value="00001566"/></p>
14.	<p>Click the X in the Position Number field to clear the current value.</p> <p>Position Number: <input type="text" value="00001566"/> X</p>
15.	<p>Enter "00001560" into the Position Number field.</p> <p>Position Number: <input type="text"/></p>
16.	<p>Position information will update when you press the Tab key.</p> <p>Press [Tab].</p>
17.	<p>Notice that the Position Description has changed to Administrative Assistant V, and that other position data has been updated.</p>
18.	<p>Click the Job Information tab.</p> <p><input type="button" value="Job Information"/></p>
19.	<p>Verify that the information on each tab has defaulted in correctly.</p> <p>Click the Payroll tab.</p> <p><input type="button" value="Payroll"/></p>
20.	<p>Verify that the Pay Group and other information is correct.</p> <p>Click the Salary Plan tab.</p> <p><input type="button" value="Salary Plan"/></p>
21.	<p>Note the Salary Plan and Grade, and then click the Compensation tab.</p> <p><input type="button" value="Compensation"/></p>
22.	<p>Verify that the compensation rate you are about to enter falls within the range for that Salary Plan and Grade, seen on the previous tab.</p> <p>Click in the Comp Rate field.</p> <p><input type="text" value="2,703.000000"/></p>
23.	<p>Click the X in the Comp Rate field to clear the current value.</p> <p><input type="text" value="2,703.000000"/> X</p>

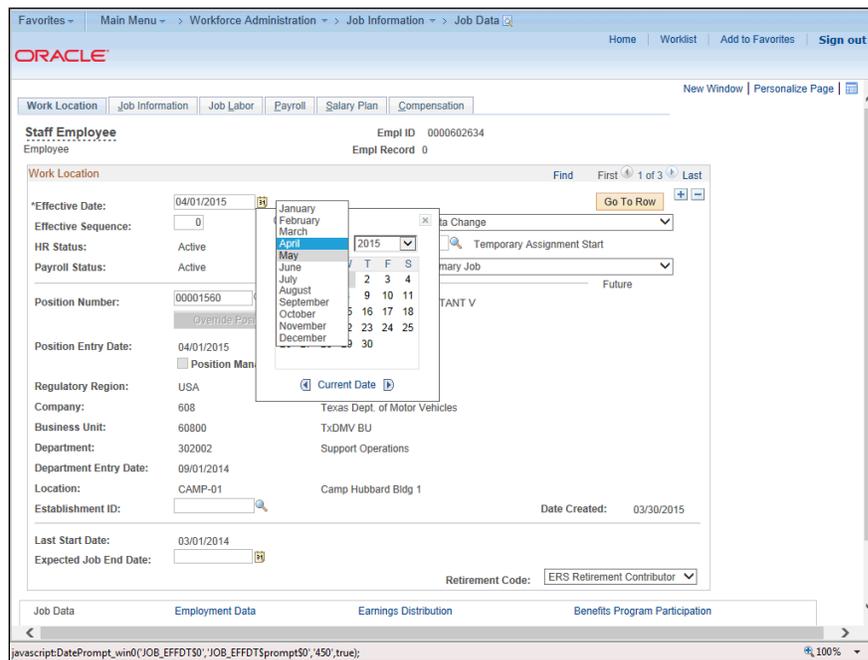
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Step	Action
24.	Enter the new temporary rate into the Comp Rate field. Enter " 3200 ".
25.	Always click the Calculate Compensation button before saving. 
26.	Click the Save button. 
27.	Click the Work Location tab. 
28.	Mr. Employee's Temporary Assignment is now in effect, as of April 1, 2015. Note that there are background processes that track the duration of a temporary assignment. The employee's manager will be notified when the temporary assignment is approaching or exceeds the six-month statutory limit.
29.	When the assignment is over, another row should be added to change him back to his previous position. Click the Home link to go back to the beginning. 
30.	As before, begin by navigating to the Job Data page. The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data Click the Job Data menu. 
31.	Click in the Last Name field. 
32.	Enter " employee " into the Last Name field. 
33.	Press [Enter] .
34.	Scroll down to see the search results.
35.	Click the Staff Employee link. 

Step	Action
36.	Add a new row for the Temporary Assignment End. Click the Add a new row (Alt+7) button. 
37.	The assignment will end on May 1, 2015. Click the Choose a date (Alt+5) button. 
38.	Open the month list. 



Step	Action
39.	Select May . 

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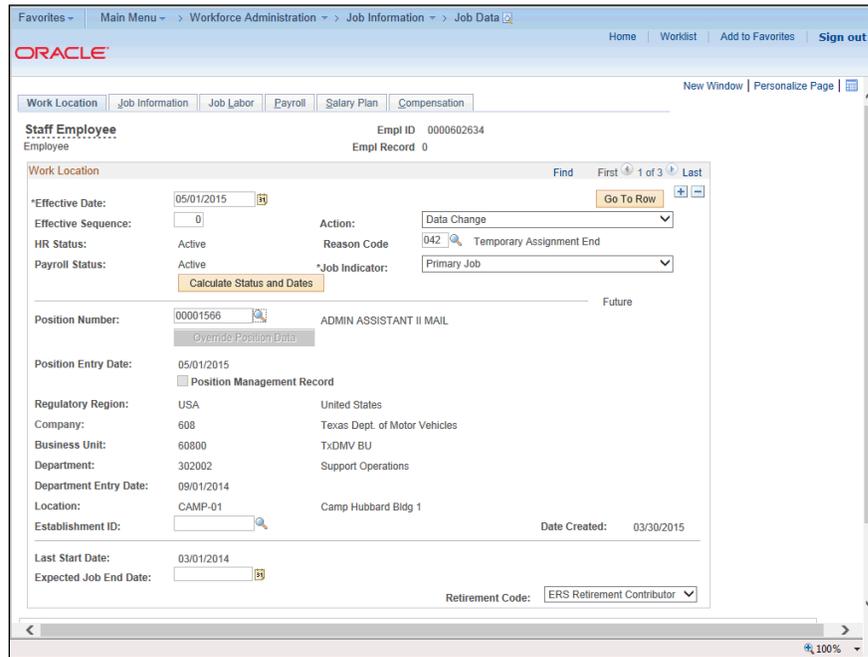
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The screenshot shows the Oracle HR/Payroll system interface. The main form is for a Staff Employee with Empl ID 0000602634. The Effective Date is 04/01/2015. A calendar pop-up is displayed over the Effective Date field, with the number 1 highlighted in a red box. The Position Number is 00001560. The form also includes fields for Company, Business Unit, Department, Location, and Establishment ID. A 'Look up Reason Code' button is visible on the right side of the form.

Step	Action
40.	Click the 1 link.
41.	The Effective Date is displayed. Again, the Action Code for this entry is Data Change . Since that is already displayed, you don't have to change that field. Click the Look up Reason Code (Alt+5) button.
42.	Select Temporary Assignment End from the Reason Code list.
43.	Next, we will return Mr. Employee to his former position. Click in the Position Number field. Position Number:
44.	Click the X in the Position Number field to clear out the current value. Position Number:
45.	Enter " 00001566 " into the Position Number field. Position Number:

Step	Action
46.	Press [Tab] to see the position information update.

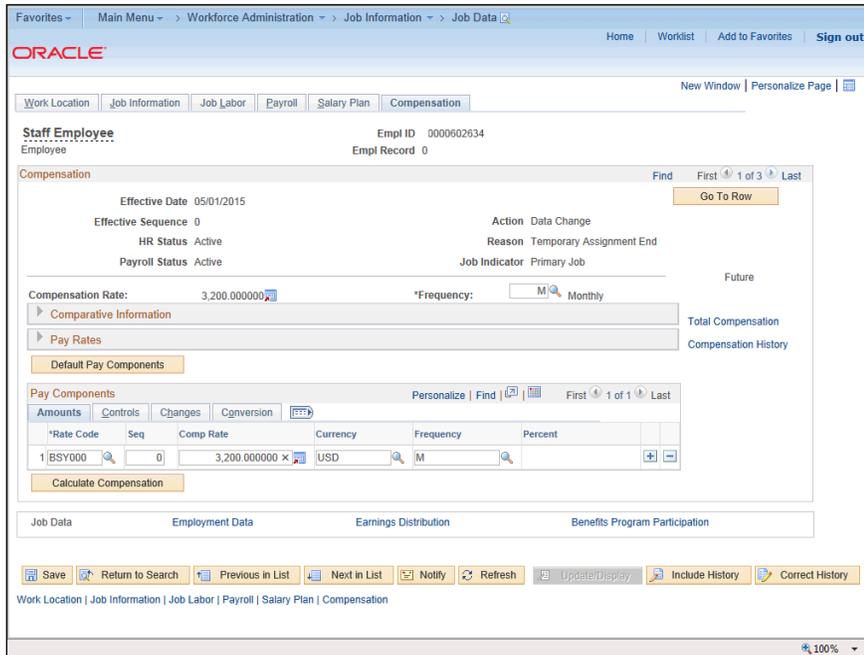


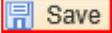
The screenshot shows the Oracle HR/Payroll interface. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Job Information > Job Data. The Oracle logo is at the top left. Below the breadcrumb trail are links for Home, Worklist, Add to Favorites, and Sign out. A navigation bar contains tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The main content area is titled 'Staff Employee' with 'Empl ID 0000602634' and 'Empl Record 0'. Below this is a 'Work Location' section with a 'Find' button and 'First 1 of 3 Last' navigation. The form fields include:

- *Effective Date: 05/01/2015
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Position Number: 00001566
- Position Entry Date: 05/01/2015
- Regulatory Region: USA
- Company: 608
- Business Unit: 60800
- Department: 302002
- Department Entry Date: 09/01/2014
- Location: CAMP-01
- Establishment ID: [empty]
- Last Start Date: 03/01/2014
- Expected Job End Date: [empty]
- Retirement Code: ERS Retirement Contributor

Step	Action
47.	Review the information on the screen, and then click the Compensation tab.

Compensation



Step	Action
48.	Click the X in the Comp Rate field to clear out the current value. 
49.	Enter Mr. Employee's former rate, " 2703 ". into the Comp Rate field.
50.	As always, click the Calculate Compensation button. 
51.	Click the Save button. 
52.	Congratulations! You have successfully completed this lesson. End of Procedure.

Leave of Absence

Section 3 Exercises, Lesson 3: Position and Job Data Changes

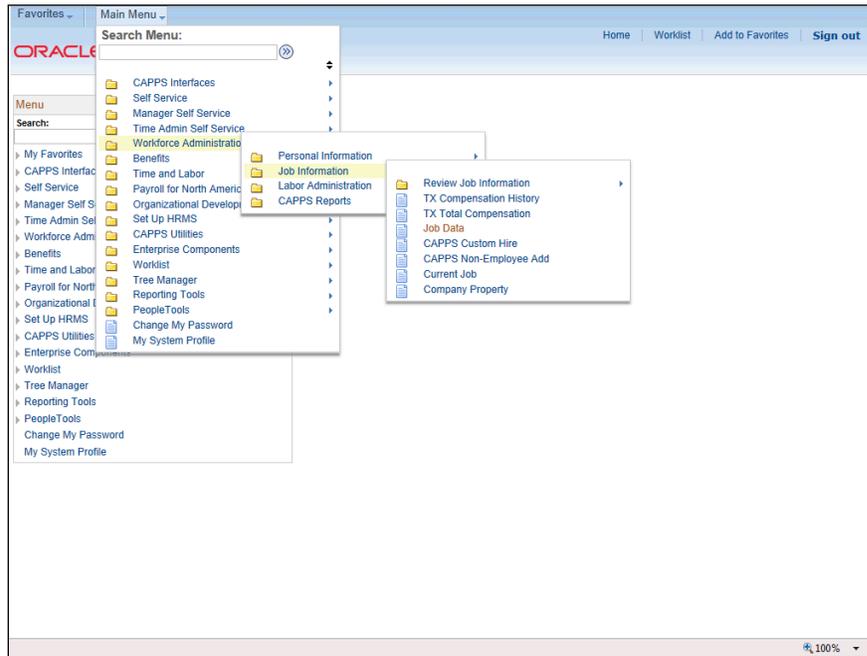
Scenario 5: Leave of Absence

Procedure

Leave of Absence transactions can be entered in Manager Self Service, if that function is available to your Agency. However, HR can serve as a backup for this function.

Leaves of Absence are entered when the leave period will be one calendar month or more. Otherwise, use the timesheet to record intermittent leave.

This lesson will demonstrate how to put an employee on Leave of Absence, change their Leave reason while on leave, and enter their Return From Leave.

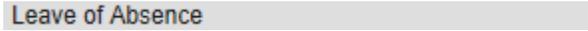


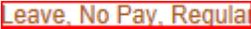
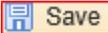
Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data</p> <p>Click the Job Data menu.</p> 
2.	<p>Test Employee ABC is going on Leave of Absence, effective May 1, 2015.</p> <p>Click in the Name field to search for this employee.</p> <p>Name: begins with ▼ <input type="text"/></p>
3.	<p>Enter "test" into the Name field.</p> <p>Name: begins with ▼ <input type="text"/></p>
4.	<p>Press [Enter].</p>
5.	<p>Click the scrollbar to find Test Employee ABC.</p>

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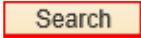
Step	Action
6.	Click the 0000000123 link. 
7.	As with most transactions, a Leave of Absence needs to be entered on a new Effective Dated row. Click the Add a new row (Alt+7) button. 
8.	Click the Choose a date (Alt+5) button. 
9.	Click the list. 
10.	Click the May list item. 
11.	Click the 1 link. 
12.	The Effective Date is displayed. Next, select the Action and Reason Code . Click the Action list. Action: 
13.	Click the Leave of Absence list item. 
14.	Click the Look up Reason Code (Alt+5) button. 

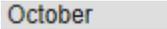
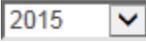
Step	Action
15.	<p>Notice the different Reason Codes displayed in the list. The process for entering each type of Leave is the same, with a different Reason Code selected for each:</p> <p>043 - Leave, No Pay, Regular M43 - Leave, No Pay, Military W43 - Leave, No Pay, Worker's Comp X43 - Leave, No Pay, Disciplinary Y43 - Leave, No Pay, Parental Z43 - Leave, No Pay, FMLA</p> <p>Note that for FMLA or Parental Leave, additional steps are required to establish the FMLA Event. This is covered in Course 140 - Benefits Administration.</p>
16.	<p>This employee is going on Regular Leave, with no pay.</p> <p>Click the Leave, No Pay, Regular link.</p> <p></p>
17.	<p>Click the scrollbar.</p>
18.	<p>Save your work.</p> <p>Click the Save button.</p> <p></p>
19.	<p>The employee's Leave of Absence has been entered, and will become effective on May 1, 2015.</p> <p>Click the scrollbar.</p>
20.	<p>Sometimes the reason for an employee being on leave changes during the leave period.</p> <p>For example, an employee might use up all of her allowable FMLA Leave, but she might still need to be on leave.</p> <p>When events like this occur, the Reason Code for the Leave should be changed in CAPPS.</p> <p>Click the Home link.</p> <p></p>
21.	<p>Navigate back to Job Data page, and then search for Test Employee ABCD.</p> <p>Click in the Name field.</p> <p>Name: begins with  <input data-bbox="943 1814 1222 1850" type="text"/></p>

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Step	Action
22.	Enter "test" into the Name field. 
23.	Click the Search button. 
24.	Click the scrollbar.
25.	Click the 0000000122 link. 
26.	This employee is currently on FMLA Leave, but her FMLA leave has been used up. She needs to be switched over to Regular Leave. But what date did her original Leave become effective? Click the scrollbar.
27.	To find the Effective Date of the current Leave, click the Include History button. This will allow you to review past Effective Dated rows. Click the Include History button. 
28.	Notice that there are now 8 records to display, where previously there was just one. Click the Show next row (Alt+.) button. 
29.	Record 2 of 8 shows us that the Effective Date of the current Leave was 7/01/2014. The Employee's FMLA Leave was used up after 3 months. So she needs to be switched over to Regular Leave as of 10/01/2014. Click the Add a new row (Alt+7) button. 
30.	Change the Effective Date to October 1, 2014. Click the Choose a date (Alt+5) button. 
31.	Click the list. 

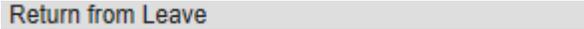
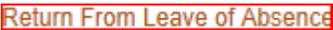
Step	Action
32.	Click the October list item. 
33.	Click the list. 
34.	Click the 2014 list item. 
35.	Click the 1 link. 
36.	The Action for this entry is Data Change . Click the Action list. Action: 
37.	Click the Data Change list item. 
38.	Click the Look up Reason Code (Alt+5) button. 
39.	You are changing her Leave to Regular with No Pay, so click the Ch Leave, No Pay, Regular link. 
40.	Click the scrollbar.
41.	Click the Save button. 
42.	Click the scrollbar.
43.	As of 10/01/2014, this employee is now on Regular Leave instead of FMLA. Now let's go back to the beginning and bring her back to work. Click the Home link. 
44.	You can navigate to the Job Data page by using the Menu region rather than the breadcrumb trail at the top. Click the Workforce Administration link. 

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Step	Action
45.	<p>This screen follows the same navigation as the breadcrumb trail we've used previously, but organizes it into sections in a table.</p> <p>In the Job Information section, click the Job Data link.</p> <p>Job Data</p>
46.	<p>Click in the Empl ID field.</p> <p>Empl ID: begins with ▼ <input type="text"/></p>
47.	<p>Enter the desired information into the Empl ID field. Enter "0000000122".</p> <p>Empl ID: begins with ▼ <input type="text"/></p>
48.	<p>Click the Search button.</p> <p>Search</p>
49.	<p>Click the Add a new row (Alt+7) button.</p> <p>+</p>
50.	<p>Ms. ABCD is returning to work effective November 17, 2014.</p> <p>Click the Choose a date (Alt+5) button.</p> <p>31</p>
51.	<p>Click the list.</p> <p>April ▼</p>
52.	<p>Click the November list item.</p> <p>November</p>
53.	<p>Click the list.</p> <p>2015 ▼</p>
54.	<p>Click the 2014 list item.</p> <p>2014</p>
55.	<p>Click the 17 link.</p> <p>17</p>
56.	<p>The Effective Date is displayed.</p> <p>Next, select the Action and Reason Code.</p> <p>Click the Action list.</p> <p>Action: <input type="text" value="Data Change"/> ▼</p>

Step	Action
57.	Click the Return from Leave list item. 
58.	Click the Look up Reason Code (Alt+5) button. 
59.	Click the Return From Leave of Absence link. 
60.	Click the scrollbar.
61.	Click the Save button. 
62.	Congratulations! You have successfully completed this lesson. End of Procedure.

Reclassifications

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 6: Reclassifications

Procedure

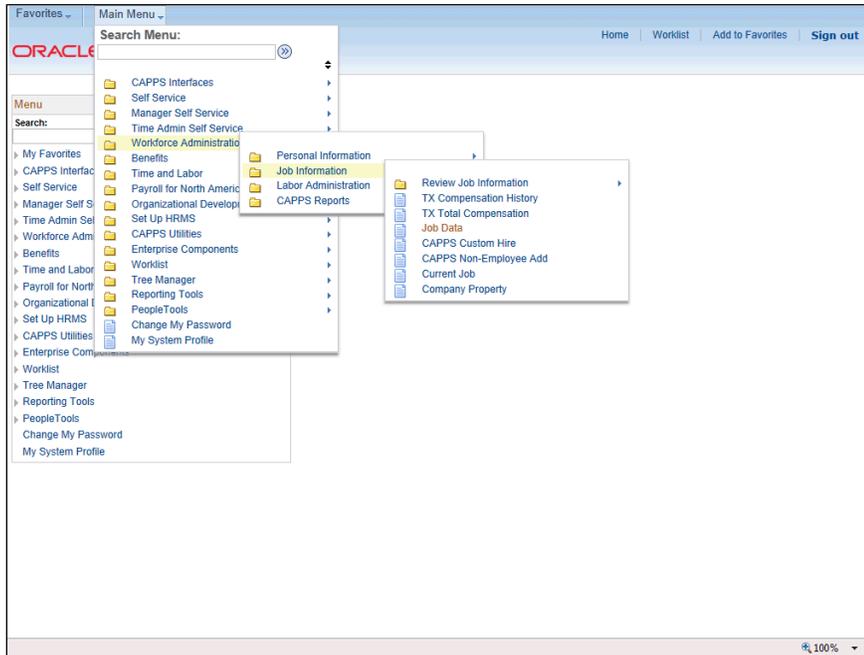
When a position is Reclassified, the changes made in Position Management will not automatically flow through to Job Data. Instead, an HR Super User with the Position Override role must bring the changes over on a new Effective Dated row.

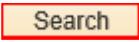
Position Management and HR must work together to coordinate transactions such as these.

In this lesson, you will learn how to use the Position Override function to update a Reclassified position.

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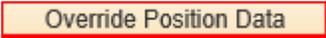
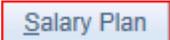
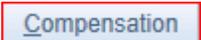
Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data.</p> 
2.	<p>Enter "0000000072" into the Empl ID field.</p> 
3.	<p>Click the Search button.</p> 
4.	<p>Click the 0000000072 link.</p> 
5.	<p>This employee is currently a Network Specialist III. However, his position has been reclassified as a Network Specialist IV.</p> <p>Position Management has already changed the Job Code in the position record. But the changes to Position Data do not automatically pass through to Job Data. HR must use the Override Position Data button to synchronize the data.</p>
6.	<p>Click the Add a new row (Alt+7) button.</p> 

Step	Action
7.	Notice that the description of the Position has already changed from Network Specialist III to IV. The new row you just inserted contains the updated information for this field.
8.	The Effective Date for this reclassification must be the same as the effective date used by Position Management when they changed the Job Code. Click in the Effective Date field. *Effective Date: <input type="text" value="04/15/2015"/>
9.	Position Management made the changes effective 4/02/2015. Enter " 040215 " into the Effective Date field. *Effective Date: <input type="text"/>
10.	Press [Tab] .
11.	Click the Action list. Action: <input type="text" value="Data Change"/>
12.	Click the Job Reclassification list item. <input type="text" value="Job Reclassification"/>
13.	Click the Look up Reason Code (Alt+5) button. 
14.	Click the Reclass, Higher Grade link. <input type="text" value="Reclass. Higher Grade"/>
15.	Click the Job Information tab. <input type="text" value="Job Information"/>
16.	Notice that the current Job Code is 0289 . The Position Number will not change, but the Job Code will.
17.	Click the Salary Plan tab. <input type="text" value="Salary Plan"/>
18.	Notice also that the current Salary Plan and Grade are B-20 . These are about to change as well.
19.	Click the Work Location tab. <input type="text" value="Work Location"/>

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Step	Action
20.	<p>The Override Position button opens the Position fields for editing.</p> <p>Click the Override Position Data button.</p> 
21.	<p>The label on the button has changed to Use Position Data. Clicking on this button again will retrieve the updated Position Data from Position Management, and enter it into the appropriate fields.</p> <p>Click the Use Position Data button.</p> 
22.	<p>Click the Job Information tab.</p> 
23.	<p>The Job Code has been updated from 0289 to 0290.</p>
24.	<p>Click the Salary Plan tab.</p> 
25.	<p>Salary Plan and Grade have updated as well.</p>
26.	<p>Click the Compensation tab.</p> 
27.	<p>Good news! He's getting a raise!</p> <p>Click in the Comp Rate field.</p> 
28.	<p>Click the X in the Comp Rate field to clear out the current value.</p> 
29.	<p>Enter the new monthly rate, "4301.16", into the Comp Rate field.</p>
30.	<p>Press [Tab].</p>
31.	<p>Click the Calculate Compensation button.</p> 
32.	<p>Click the Save button.</p> 

Step	Action
33.	<p>At this point, the Position Data and Job Data for this employee are back in sync, and the reclassification is complete.</p> <p>Sometimes, however, changes to a position originate in HR instead of Position Management. Please continue to the next lesson, Syncing Job and Position Data, to learn more.</p>
34.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Syncing Job and Position Data

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 7: Syncing Job and Position Data

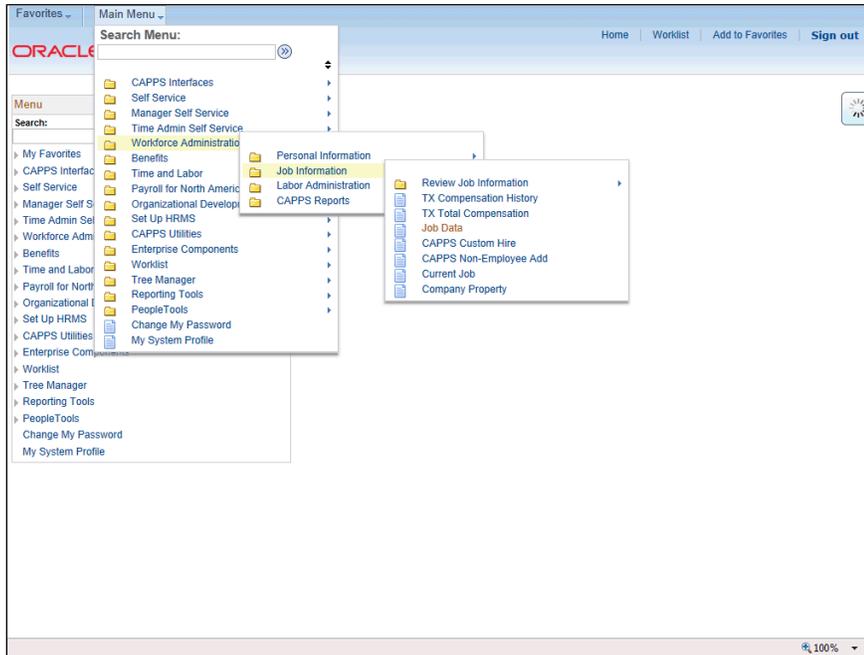
In most situations, changes to Position Data originate in Position Management. Occasionally, however, changes will originate in HR, when the HR Super User uses the Override Position function to make the change directly in the Job Data page. When this happens, however, Position and Job Data are no longer in sync. The system will generate an email to Position Management, informing them of the change, and the Audit Exception Positions Report will show the discrepancy. Position Management will make the changes in the Position, and then contact HR to re-synchronize Position and Job Data.

This lesson demonstrates that process, from the HR perspective.

Procedure

When changes to a position are entered first in HR instead of Position Management, the Position and Job Data are out of sync.

This lesson demonstrates what must be done in HR to keep the two sides of the Position aligned.



Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data</p> <p>Click the Job Data menu.</p> 
2.	<p>Enter "0000000089" into the Empl ID field.</p> <p>Empl ID: begins with ▼ </p>
3.	<p>Press [Enter].</p>
4.	<p>Test Employee DDDA's position has been reclassified, from Administrative Assistant IV to V. We want to get the Job Code changed right away, to meet a Payroll deadline.</p> <p>So we've decided to make the changes directly in Job Data, rather than waiting for Position Management to initiate the process.</p>
5.	<p>Click the Salary Plan tab.</p> 

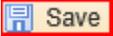
Step	Action
6.	<p>Notice that the current Salary Plan and Grade is A-15.</p> <p>Go back to the Work Location tab.</p> 
7.	<p>The change will be made on a new Effective Dated row. The Effective Date will be April 1, 2015.</p> <p>Click the Add a new row (Alt+7) button.</p> 
8.	<p>Click the Choose a date (Alt+5) button.</p> 
9.	<p>Click the 1 link.</p> 
10.	<p>Click the Action list.</p> <p>Action: </p>
11.	<p>Click the Job Reclassification list item.</p> 
12.	<p>Click the Look up Reason Code (Alt+5) button.</p> 
13.	<p>Click the Reclass, Hgh Sal Grp up to 6.8 link.</p> 
14.	<p>The Job Code field is normally locked and cannot be edited, so that it stays in sync with Position Management.</p> <p>But an HR SuperUser with the right Security Role can use the Override Position Data button to unlock this field.</p> <p>Click the Override Position Data button.</p> 
15.	<p>Notice all the fields that are now available for editing.</p> <p>Also, the label on the button has changed to Use Position Data. We'll leave it that way for now. (That will be important later.)</p>
16.	<p>Click the Job Information tab.</p> 

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Step	Action
17.	Click in the Job Code field. *Job Code <input type="text" value="0156"/>
18.	Click the X in the Job Code field to clear out the existing value. *Job Code <input type="text" value="0156"/> x
19.	Enter the reclassified Job Code, " 0158 ", in the Job Code field. *Job Code <input type="text"/>
20.	Press [Enter] .
21.	The Job Code Description updated right away.
22.	Click the Salary Plan tab. <input type="button" value="Salary Plan"/>
23.	The Plan and Grade have been updated from A-15 to A-17 . Click the Compensation tab. <input type="button" value="Compensation"/>
24.	A raise comes along with the reclassification (which is why we wanted to beat the Payroll deadline). Click in the Comp Rate field. <input type="text" value="4,202.400000"/>
25.	Click the X in the Comp Rate field to clear it. <input type="text" value="4,202.400000"/> x
26.	Enter the desired information into the Comp Rate field. Enter " 4300 ".
27.	Don't forget to click the Calculate Compensation button. <input type="button" value="Calculate Compensation"/>
28.	Click the Save button, and you're done. (For now, at least.) <input type="button" value="Save"/>
29.	The CAPPS system will automatically send a notification to Position Management at this point, alerting them to the changes that you just made, so that they can correct the Position Data on their side. Once they have updated the Position Data, they will contact you so that you can perform the final step in the process.

Step	Action
30.	Navigate back to the Job Data menu. 
31.	Look the employee up again. Enter " 0000000089 " into the Empl ID field. Empl ID: begins with ▼ 
32.	Press [Enter] .
33.	DO NOT ADD a new Effective Dated row for this part of the transaction. We're still working with the same row we entered earlier.
34.	Remember how the label on the Override button changed earlier? It now says Use Position Data . Clicking on this button will reset the link between Position Data and Job Data that was broken when we clicked Override . But the button is currently disabled and can't be clicked. To complete this transaction, we need to go into Corrections mode, and reset that button, on the same Effective Dated row as before.
35.	Click the scrollbar.
36.	Click the Correct History button. 
37.	The Use Position Data button is now available. Click the Use Position Data button. 
38.	Click the scrollbar.
39.	Click the Save button. 
40.	Your update has been saved, and your Position and Job Data are back in sync.
41.	Congratulations! You have successfully completed this lesson. End of Procedure.

Entering Merit Increases and Equity Adjustments

Section 3 Exercises, Lesson 4: Entering Merit Increases or Equity Adjustments

Merit Increases and Equity Adjustments are entered in the system by creating a new Effective Dated row for the change.

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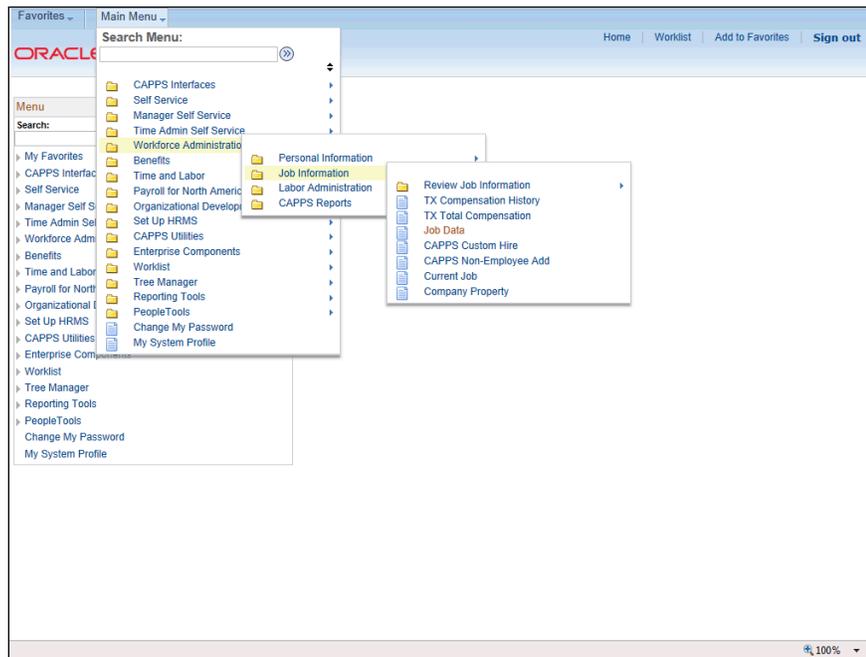
CAPPS allows you to make future-dated and retroactive transactions by entering an Effective Date on a new row. It is very important to understand the impact those changes might have, especially when entering retroactive changes. CAPPS edits allow for a retroactive transaction when the date is in the current calendar month or one calendar month in the past. If the retroactive change is valid past that timeframe, then a Letter of Authorization for Data Change must be submitted.

Future or current-dated changes are preferred, as they ensure that the changes are made in a timely manner and allow for better planning.

Procedure

CAPPS allows you to make future-dated and retroactive transactions by entering an Effective Date on a new row.

This lesson will demonstrate how to enter a Merit Increase or Equity Adjustment for a past or future date.



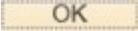
Step	Action
1.	<p>Begin by navigating to the Job Data page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Job Information > Job Data.</p> <p>Click the Job Data menu.</p> 
2.	<p>We need to enter a Merit Increase for one employee and an Equity Adjustment for another. The first should have taken effect on March 1, and the second will take effect on May 1. (For this scenario, that's in the future.)</p> <p>Enter the Empl ID for the first employee into the Empl ID field.</p> <p>Enter "0000000016".</p> <p>Empl ID: <input type="text" value=""/> begins with <input type="text" value=""/></p>
3.	<p>The Job Data page for the first employee is displayed.</p> <p>Click the Add a new row (Alt+7) button.</p> 
4.	<p>The Effective Date for this entry is March 1, 2015.</p> <p>Click the Choose a date (Alt+5) button.</p> 
5.	<p>Click the 1 link.</p> 
6.	<p>The Effective Date is displayed.</p> <p>Next, select the Action and Reason codes for the entry.</p> <p>Click the Action list.</p> <p>Action: <input type="text" value="Data Change"/></p>
7.	<p>Select Pay Rate Change.</p> 
8.	<p>Click the Look up Reason Code (Alt+5) button.</p> 

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Step	Action
9.	Notice the Reason Code list. The reason code for a Merit Increase is 025 , and the reason code for an Equity Adjustment is 040 .
10.	Click the Merit Increase link. 
11.	The Action and Reason Code are set. Click the Salary Plan tab. 
12.	Note the Salary Plan and Grade (A-06). Click the Compensation tab. 
13.	Be sure that the new compensation rate falls within the range for the Plan and Grade seen on the previous slide. In FY15, the range for A-06 is \$1725.50 - \$2457.00 monthly.
14.	Changes to the Compensation Rate can be made by entering a dollar amount, or by entering a percentage. If you want to enter a flat dollar amount, you would use the Comp Rate field.
15.	A Change Percent field is available on the Change tab. Click the Changes link. 
16.	Click in the Change Percent field. 
17.	This employee is going to receive a 5% raise. Enter the number " 5 " into the Change Percent field.
18.	Press [Tab] .
19.	Click the Calculate Compensation button to calculate the Change Amount . 
20.	The monthly change to the employee's salary will be \$87.95.

Step	Action
21.	Click the Save button. 
22.	This message window appears to remind you about important agency policies regarding merit increases. Click the OK button. 
23.	If a Salary Change is made after payroll has processed, you will see this Warning message. This is a reminder that you will need to contact Payroll to ensure that the employee's retroactive increase gets paid correctly. Click the OK button. 
24.	This retroactive Merit Increase has now been entered, and will be reflected in the employee's next paycheck. Now let's enter the future-dated Equity Adjustment for the second employee.
25.	There are two ways to get back to the Job Data Search page from here. One way is to click Job Data in the breadcrumb trail at the top of the screen.

[Favorites](#) | [Main Menu](#) > [Workforce Administration](#) > [Job Information](#) > [Job Data](#)
Home | Worklist | Add to Favorites | Sign out

ORACLE
New Window | Personalize Page |

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Test Employee KKB Empl ID 0000000016
 Employee Empl Record 0

Compensation Find First 1 of 1 Last
[Go To Row](#)

Effective Date 03/01/2015
 Effective Sequence 0 Action Pay Rate Change
 HR Status Active Reason Merit Increase
 Payroll Status Active Job Indicator Primary Job

Current

Compensation Rate: 2,000.000000 *Frequency: M Monthly

Total Compensation
Compensation History

Personalize | Find | First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1BSY000	0	2,000.000000	USD	M	

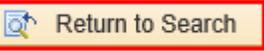
Calculate Compensation

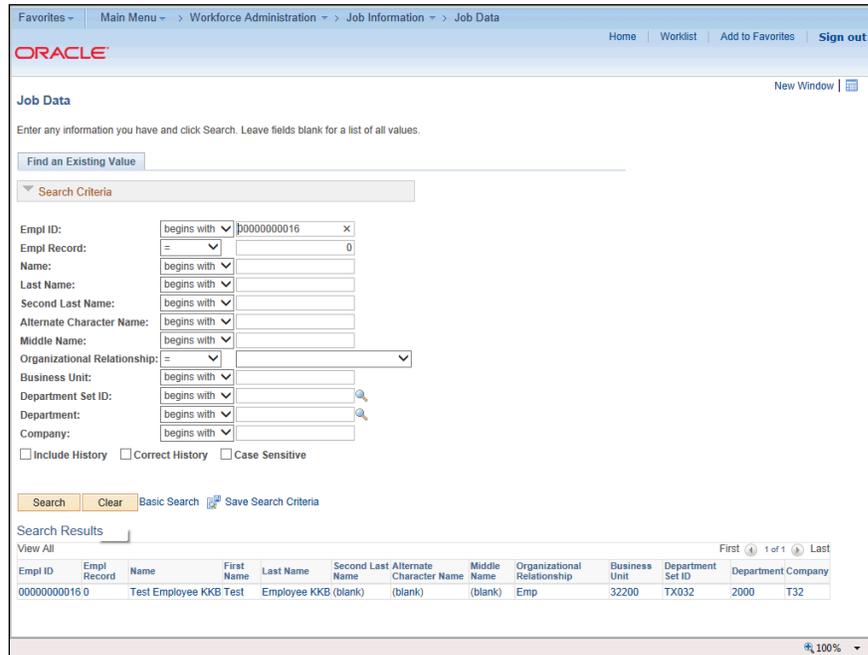
[Job Data](#) | [Employment Data](#) | [Earnings Distribution](#) | [Benefits Program Participation](#)

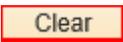
[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#) | [Update Display](#) | [Include History](#) | [Correct History](#)

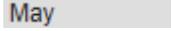
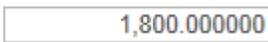
[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

100%

Step	Action
26.	<p>The other method is to click the Return to Search button at the bottom of the screen.</p> <p>Click the Return to Search button.</p> <div style="border: 2px solid red; padding: 5px; display: inline-block;">  </div>



Step	Action
27.	<p>If you select the Return to Search button, the Search Criteria field will be auto-populated with the Empl ID for the last person you were looking at.</p> <p>Click the Clear button to search for a different user.</p> <p></p>
28.	<p>Enter the second employee's ID, "00000000086", into the Empl ID field.</p> <p>Empl ID: begins with ▼ </p>
29.	<p>Press [Enter].</p>
30.	<p>Since you were last looking at the Compensation tab before you clicked Return to Search, the system returns you to that tab for the new user.</p> <p>This saves some clicking if you are looking at the same information for multiple employees.</p> <p>Click the Work Location tab.</p> <p></p>
31.	<p>Enter a new row for the Equity Adjustment.</p> <p>Click the Add a new row (Alt+7) button.</p> <p></p>

Step	Action
32.	<p>The Effective Date for this increase will be May 1, 2015.</p> <p>Click the Choose a date (Alt+5) button.</p> 
33.	<p>Open the month list.</p> 
34.	<p>Select May.</p> 
35.	<p>Click the 1 link.</p> 
36.	<p>The Effective Date is displayed.</p> <p>Now we will select the appropriate Action and Reason Code.</p> <p>Click the Action list.</p> <p>Action: </p>
37.	<p>Select Pay Rate Change.</p> 
38.	<p>Click the Look up Reason Code (Alt+5) button.</p> 
39.	<p>Click the Equity Adjustment Pay link.</p> 
40.	<p>Click the Salary Plan tab.</p> 
41.	<p>Note the Plan and Grade for this position, which is A-05.</p>
42.	<p>Click the Compensation tab.</p> 
43.	<p>Click in the Comp Rate field.</p> 
44.	<p>Click the X in the Comp Rate field to clear out the current value.</p> 

Step	Action
45.	Remember that the new Compensation Rate must fall within the range for this positions Salary Plan and Grade, A-05. For 2015, that range is \$1648.08 to \$2344.75 monthly. Enter the new rate, "1950", into the Comp Rate field.
46.	Click the Calculate Compensation button. 
47.	Click the Save button. 
48.	Remember to watch for this indicator that your file has saved successfully. If you do not see this message, there may have been an error that prevented your change from being processed. The Saved bubble only appears briefly, and then goes away.
49.	Click the Home link. 
50.	Congratulations! You have successfully completed this lesson. End of Procedure.

Knowledge Check 1

Labor Relations

Section 4: Labor Relations

Objectives:

- Learn how to record a Disciplinary Action
- Learn how to record a Grievance

Please note that this training is specific to the CAPPS Human Resources system, and only covers the part of business processes that are performed in the system. Some processes may be affected by outside process steps, documentation requirements, or Agency-specific policies and procedures that are not covered in this training.

Recording Disciplinary Actions

Section 4 Exercises, Lesson 1: Recording Disciplinary Actions

When a formal disciplinary action has been taken, the specific process steps involved can be tracked in CAPPS HR - Labor Administration.

This functionality may be used at the Agency's discretion.

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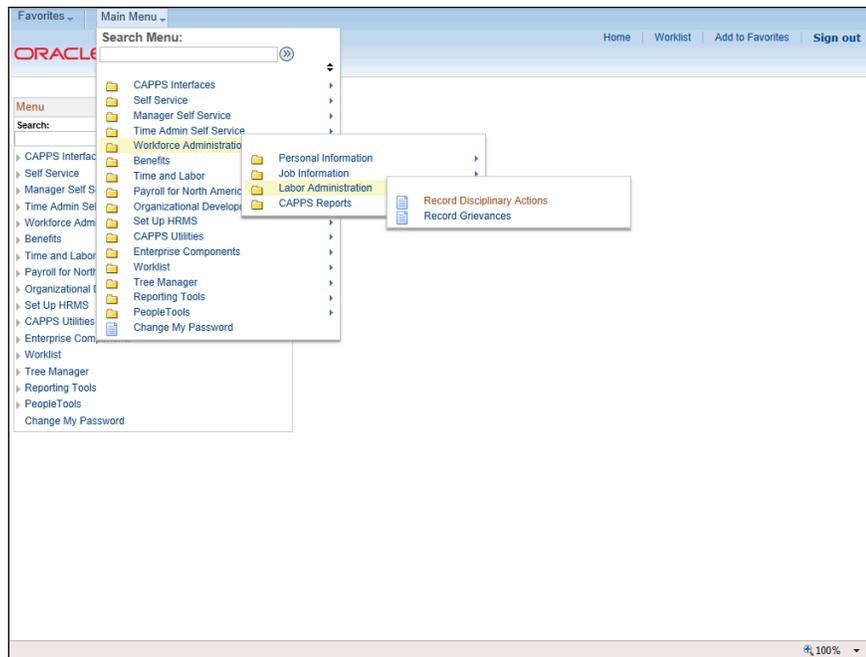
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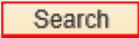


Procedure

When a formal disciplinary action has been taken, the specific process steps involved can be tracked in Labor Administration.

This lesson will demonstrate how the Disciplinary Action can be tracked, should the Agency decided to track the action in CAPPS.



Step	Action
1.	<p>Begin by navigating to the Record Disciplinary Actions page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Labor Administration > Record Disciplinary Actions.</p> <p></p>
2.	<p>Enter all or part of the employee's ID, "00087", into the Empl ID field.</p> <p>Empl ID: begins with  </p>
3.	<p>Click the Search button.</p> <p></p>
4.	<p>Click the 0000876130 link.</p> <p></p>

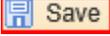
Step	Action
5.	<p>The Disciplinary Action page for the selected employee is displayed.</p> <p>The first tab contains information about the cause for the Disciplinary Action.</p> <p>Click the Look up Type (Alt+5) button.</p> 
6.	<p>Select the appropriate Disciplinary Type from the list.</p> <p>Click the Work Rule Violation link.</p> 
7.	<p>The Reported Date defaults to the current date, but can be changed if necessary.</p>
8.	<p>Click in the Description field.</p> <p>*Description </p>
9.	<p>In the Description field, briefly describe the behavior that is involved in this Disciplinary Action.</p> <p>For this example, press <Enter> and the description will be entered for you.</p> <p>*Description </p>
10.	<p>Click the Look up Supervisor ID (Alt+5) button.</p> 
11.	<p>Click in the Last Name field.</p> <p>Last Name: begins with ▼ </p>
12.	<p>Enter the Supervisor's last name into the Last Name field.</p> <p>Enter "worker".</p> <p>Last Name: begins with ▼ </p>
13.	<p>Click the Look Up button.</p> 
14.	<p>Click the 000061245 link.</p> 

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Step	Action
15.	Click the Action Taken tab. 
16.	The second tab describes the Disciplinary Action being taken. Click the Look up Disciplinary Step (Alt+5) button. 
17.	Click the 2nd Level Reminder link. 
18.	Click the Look up Step Resolution (Alt+5) button. 
19.	When the step has been resolved, you can record that here. For now, click the Cancel button. 
20.	Click in the Discussed With field. 
21.	Enter the name of the person who discussed this action with the employee. Enter " HR, Representative " into the Discussed With field. 
22.	Click in the Comment field. 
23.	Enter any comments about the discussion in the Comment field. For this example, press <Enter> and the comment will be entered for you. 
24.	Click the Disciplinary Resolution tab. 

Step	Action
25.	When the action is resolved, the resolution can be entered on the third tab. For now, click the Save button to save your work. 
26.	Congratulations! You have successfully completed this lesson. End of Procedure.

Recording a Grievance

Section 4 Exercises, Lesson 2: Recording a Grievance

When an employee has been dismissed and files a Grievance, the information about that Grievance can be tracked in CAPPS HR - Labor Administration.

This functionality may be used at the Agency's discretion.

Procedure

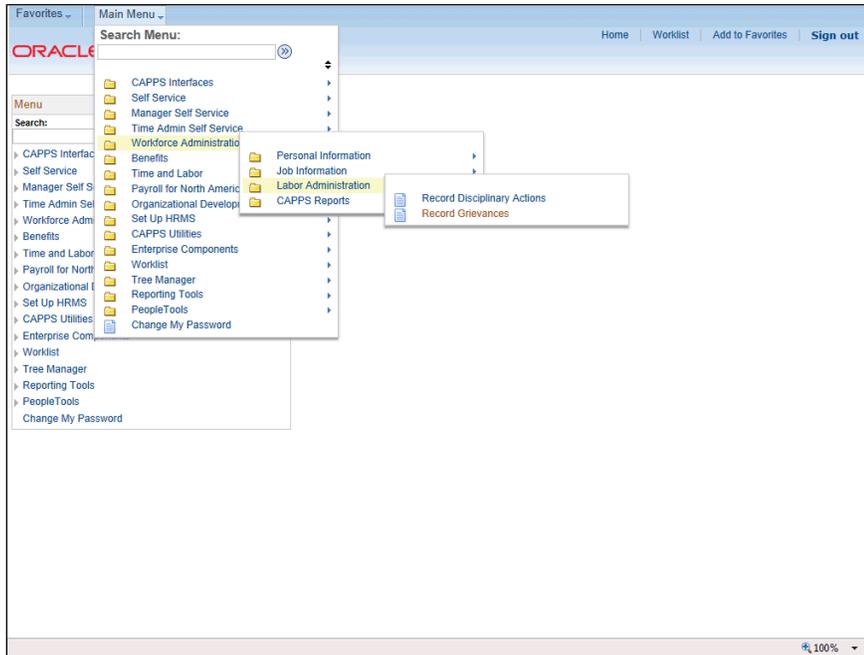
When an employee has been dismissed and files a Grievance, the resolution process can be tracked in **CAPPS HR - Labor Administration**.

This lesson demonstrates how that is done.

Note: Agencies may decide not to use this functionality in CAPPS.

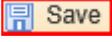
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Step	Action
1.	<p>Begin by navigating to the Record Grievances page.</p> <p>The Navigation is: Main Menu > Workforce Administration > Labor Administration > Record Grievances.</p> 
2.	<p>You can use this page to look up existing Grievance records, or begin a new one.</p> <p>Click the Add a New Value tab.</p> 
3.	<p>The Grievance ID number will be automatically generated when the record is saved.</p> <p>Click the Add button.</p> 
4.	<p>Click in the Employee/Applicant field.</p> 

Step	Action
5.	Enter the Empl ID number of the employee filing the Grievance in the Employee/Applicant field. Enter " 000876130 ". Employee/Applicant <input data-bbox="836 499 1013 537" type="text"/>
6.	The employee's name is displayed. The Grievance Date defaults to the current date, but can be changed if necessary.
7.	Click the Look up Type (Alt+5) button. 
8.	Select the Grievance Type from the list. Click the Dismissal link. Dismissal
9.	Click in the Description field. Description <input data-bbox="532 982 1377 1066" type="text"/>
10.	Enter a description of the Grievance in this field. For this example, press < Enter > and the description will be entered for you. Description <input data-bbox="532 1192 1377 1276" type="text"/>
11.	Click the Grievance Steps tab. Grievance Steps
12.	The Grievance Steps tab allows you to track the steps that are taken to resolve this grievance. Click the Look up Grievance Step (Alt+5) button. 
13.	This is the first entry for a Grievance that has just been received. As you can see from this list, each step in the Grievance process can be tracked. Click the Receive Grievance link. Receive Grievance

Step	Action
14.	Click the Grievance Resolution link. 
15.	When (or if) the Grievance is finally resolved, the resolution and comments can be entered on this tab.
16.	Click the Grievance tab. 
17.	Click the Save button. 
18.	Congratulations! You have successfully completed this lesson. End of Procedure.

HR Reports

Section 5: HR Queries & Reports

Objectives:

- Learn how to view HR Queries
- Learn how to create Run Controls
- Learn how to use Run Controls to run a report

Running a Query

Section 5 Exercises, Lesson 1: Running a Query

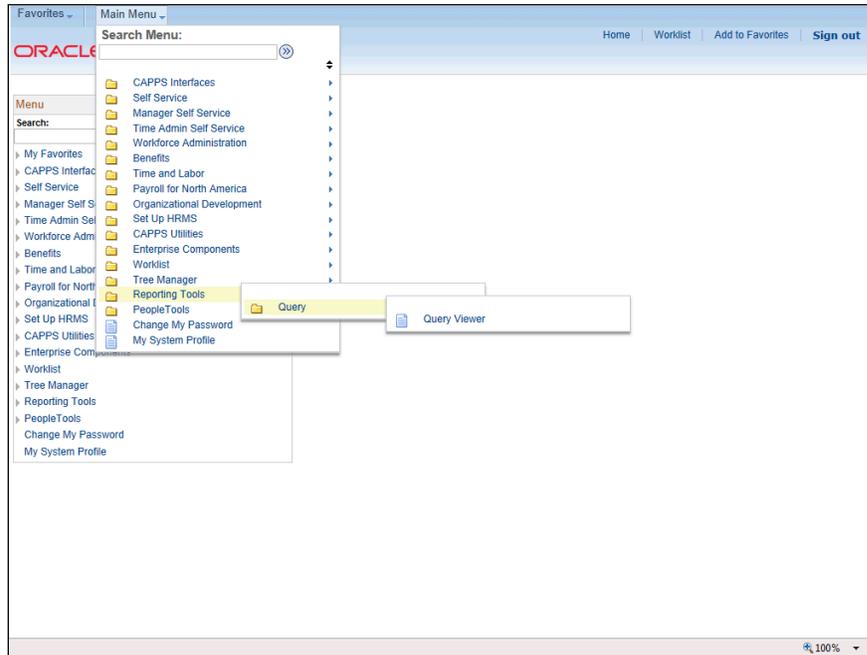
A query is a simple pre-defined reporting process that can be run to retrieve data from the CAPPS tables. A variety of queries are available to most users.

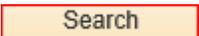
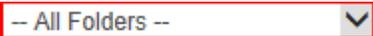
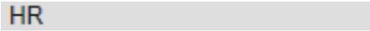
Unlike Reports, parameters for some queries may be predetermined rather than being selected when the query is run. However, a query can be run in Excel format, where the data can be sorted, filtered, and repurposed as needed.

Procedure

A query is a simple pre-defined reporting process that can be run to retrieve data from the CAPPS tables. A variety of queries are available to most users. Some allow parameters to be entered to filter data, and others do not.

This lesson will demonstrate how to select and run a query from the list provided.



Step	Action
1.	<p>Begin by navigating to the Query Viewer page.</p> <p>The Navigation is: Main Menu > Reporting Tools > Query > Query Viewer.</p> 
2.	<p>To see a full list of the available queries, click the search button without entering any parameters.</p> <p>Click the Search button.</p> 
3.	<p>The entire list of queries is displayed. Let's narrow it down a bit.</p> <p>At the top of the Search Results is a dropdown list that divides the queries into folders.</p> <p>Click the Folder View list.</p> <p>*Folder View </p>
4.	<p>Select the folder that will display only the HR reports.</p> <p>Click the HR list item.</p> 

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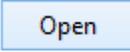
EUT Course

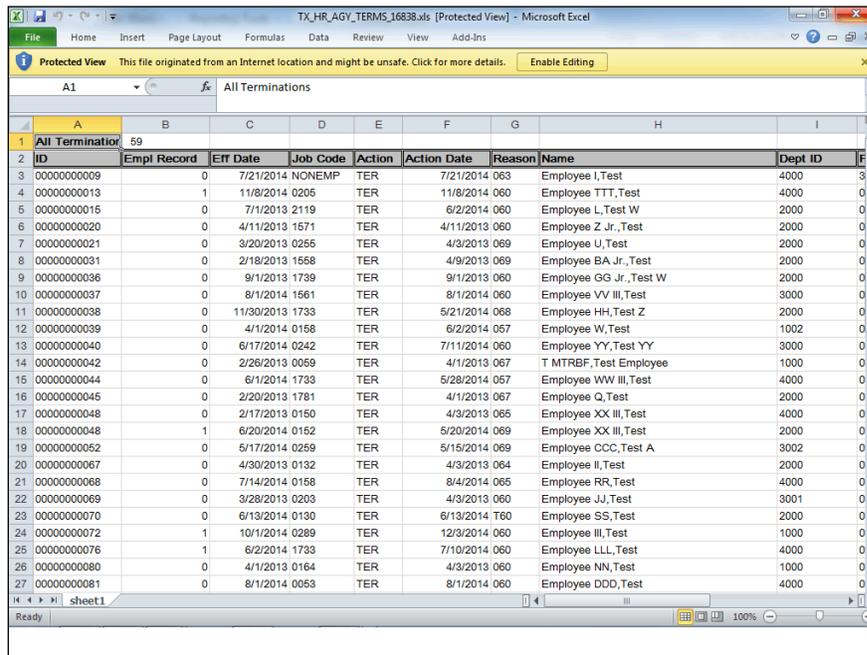


Step	Action
5.	Notice that all of the queries in this folder start with "TX_HR". In the future, you could type "TX_HR" in the Search By field to skip to this point.
6.	All of the queries in the HR folder are listed here, along with a brief description of the information they will return.
7.	By clicking on the appropriate link, you can display the results of each query in HTML, Excel, or XML format.
8.	You can also save it to Favorites if you run the same query regularly.
9.	For this example, let's look at the query titled TX_HR_AGY_TERMS , in Excel format.
10.	Click the Excel link. 

The screenshot shows the Oracle CAPPS Query Viewer interface. At the top, there are navigation links: Favorites, Main Menu, Reporting Tools, Query, and Query Viewer. The Oracle logo is on the left, and Home, Worklist, Add to Favorites, and Sign out are on the right. Below the navigation, there's a search section with a dropdown for "Search By" set to "Query Name" and a "Search" button. The "Search Results" section shows a table of queries in the "HR" folder. The table has columns for Query Name, Description, Owner, Folder, and actions for Run to HTML, Run to Excel, Run to XML, Schedule, and Add to Favorites. The query "TX_HR_AGY_TERMS" is highlighted, and its "Run to Excel" link is active. At the bottom, a dialog box asks "Do you want to open or save TX_HR_AGY_TERMS_16838.xls (27.5 KB) from audaap92.core.cpa.state.tx.us?" with "Open", "Save", and "Cancel" buttons.

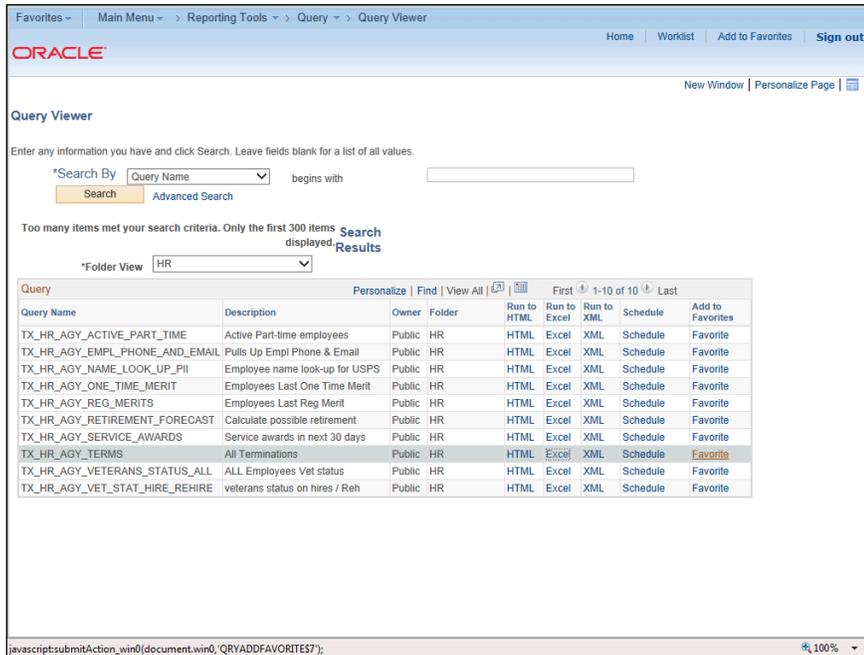
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
TX_HR_AGY_ACTIVE_PART_TIME	Active Part-time employees	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_NAME_LOOK_UP_PII	Employee name look-up for USPS	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_ONE_TIME_MERIT	Employees Last One Time Merit	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_REG_MERITS	Employees Last Reg Merit	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_RETIREMENT_FORECAST	Calculate possible retirement	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_TERMS	All Terminations	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_VETERANS_STATUS_ALL	ALL Employees Vet status	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_VET_STAT_HIRE_REHIRE	veterans status on hires / Reh	Public	HR	HTML	Excel	XML	Schedule	Favorite

Step	Action
11.	<p>You can open the query on your screen, or save it for later use by clicking the appropriate button.</p> <p>Note: This step may vary, depending on your computer setup.</p> <p>Click the Open button.</p> 
12.	The results of your query are displayed in an Excel spreadsheet.



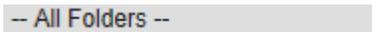
ID	Empl Record	Eff Date	Job Code	Action	Action Date	Reason	Name	Dept ID
0000000009	0	7/21/2014	NONEMP	TER	7/21/2014	063	Employee I,Test	4000
0000000013	1	11/8/2014	0205	TER	11/8/2014	060	Employee TTT,Test	4000
0000000015	0	7/1/2013	2119	TER	6/2/2014	060	Employee L,Test W	2000
0000000020	0	4/11/2013	1671	TER	4/11/2013	060	Employee Z Jr.,Test	2000
0000000021	0	3/20/2013	0255	TER	4/3/2013	069	Employee U,Test	2000
0000000031	0	2/18/2013	1558	TER	4/9/2013	069	Employee BA Jr.,Test	2000
0000000036	0	9/1/2013	1739	TER	9/1/2013	060	Employee GG Jr.,Test W	2000
0000000037	0	8/1/2014	1561	TER	8/1/2014	060	Employee VV III,Test	3000
0000000038	0	11/30/2013	1733	TER	5/21/2014	068	Employee HH,Test Z	2000
0000000039	0	4/1/2014	0158	TER	6/2/2014	057	Employee W,Test	1002
0000000040	0	6/17/2014	0242	TER	7/11/2014	060	Employee YY,Test YY	3000
0000000042	0	2/26/2013	0059	TER	4/1/2013	067	T MTRBF,Test Employee	1000
0000000044	0	6/1/2014	1733	TER	5/28/2014	057	Employee WW II,Test	4000
0000000045	0	2/20/2013	1781	TER	4/1/2013	067	Employee Q,Test	2000
0000000048	0	2/17/2013	0150	TER	4/3/2013	065	Employee XX III,Test	4000
0000000048	1	6/20/2014	0152	TER	5/20/2014	069	Employee XX III,Test	2000
0000000052	0	5/17/2014	0259	TER	5/15/2014	069	Employee CCC,Test A	3002
0000000067	0	4/30/2013	0132	TER	4/3/2013	064	Employee II,Test	2000
0000000068	0	7/14/2014	0158	TER	8/4/2014	065	Employee RR,Test	4000
0000000069	0	3/28/2013	0203	TER	4/3/2013	060	Employee JJ,Test	3001
0000000070	0	6/13/2014	0130	TER	6/13/2014	T60	Employee SS,Test	2000
0000000072	1	10/1/2014	0289	TER	12/3/2014	060	Employee III,Test	1000
0000000076	1	6/2/2014	1733	TER	7/10/2014	060	Employee LLL,Test	4000
0000000080	0	4/1/2013	0164	TER	4/3/2013	060	Employee NN,Test	1000
0000000081	0	8/1/2014	0053	TER	8/1/2014	060	Employee DDD,Test	4000

Step	Action
13.	<p>The query results opened in a new window.</p> <p>Click the Close button to return to CAPPS.</p> 

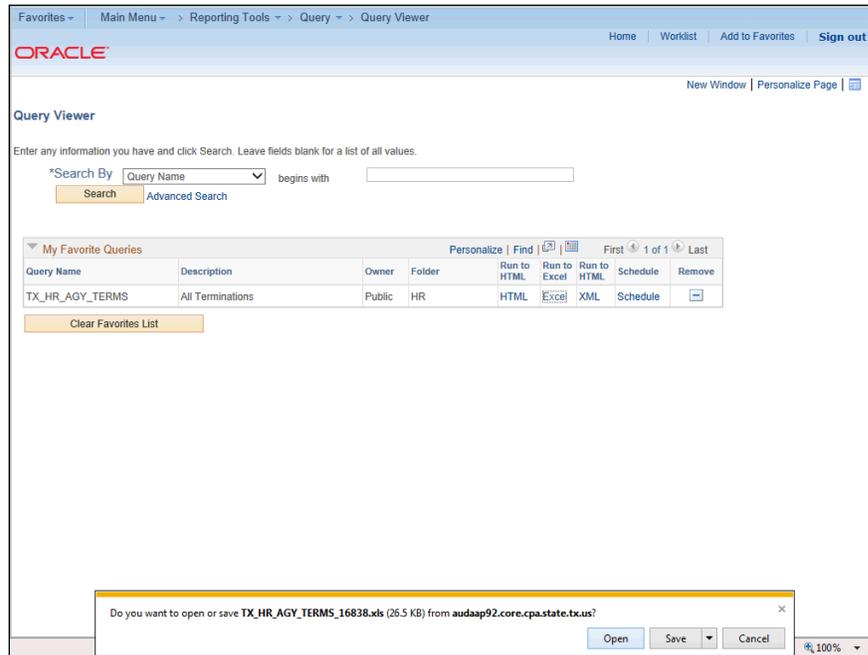


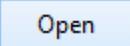
Oracle Query Viewer interface showing a list of queries. The 'Folder View' dropdown is set to 'HR'.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
TX_HR_AGY_ACTIVE_PART_TIME	Active Part-time employees	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_EMPL_PHONE_AND_EMAIL	Pulls Up Empl Phone & Email	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_NAME_LOOK_UP_PII	Employee name look-up for USPS	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_ONE_TIME_MERIT	Employees Last One Time Merit	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_REG_MERITS	Employees Last Reg Merit	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_RETIREMENT_FORECAST	Calculate possible retirement	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_SERVICE_AWARDS	Service awards in next 30 days	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_TERMS	All Terminations	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_VETERANS_STATUS_ALL	ALL Employees Vet status	Public	HR	HTML	Excel	XML	Schedule	Favorite
TX_HR_AGY_VET_STAT_HIRE_REHIRE	veterans status on hires / Reh	Public	HR	HTML	Excel	XML	Schedule	Favorite

Step	Action
14.	<p>If you use the same report on a regular basis, you can add it to your list of Favorites to make it more easily accessible next time.</p> <p>Click the Favorite link.</p> 
15.	<p>When you have queries marked as Favorites, the list appears at the bottom of the screen.</p>
16.	<p>If there is a long list on the screen, your Favorites will still appear at the bottom, so you may need to scroll to find them.</p> <p>Let's go back to the full list, to see how we will find our list of Favorites.</p> <p>Click the Folder View list.</p> 
17.	<p>Click the All Folders list item.</p> 
18.	<p>Scroll down to the bottom to find your Favorites list.</p> <p>Click the scrollbar.</p>
19.	<p>Here it is, at the bottom of the screen below the main list.</p>

Step	Action
20.	Click the scrollbar.
21.	Next time you visit the Query Viewer , your Favorites list will appear on the initial search screen. Click the Main Menu . 
22.	Navigate to the Query Viewer , as before. The Navigation is: Main Menu > Reporting Tools > Query > Query Viewer . 
23.	Your Favorites are already listed at the bottom of the page, so you can run your favorite queries without searching for them. Click the Excel link. 



Step	Action
24.	Click the Open button. 

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TX_HR_AGY_TERMS_16838.xls [Protected View] - Microsoft Excel

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All Terminations

ID	Empl Record	Eff Date	Job Code	Action	Action Date	Reason	Name	Dept ID
0000000009	0	7/21/2014	NONEMP	TER	7/21/2014	063	Employee I,Test	4000
0000000013	1	11/8/2014	0205	TER	11/8/2014	060	Employee TTT,Test	4000
0000000015	0	7/1/2013	2119	TER	6/2/2014	060	Employee L,Test W	2000
0000000020	0	4/11/2013	1571	TER	4/11/2013	060	Employee Z Jr.,Test	2000
0000000021	0	3/20/2013	0255	TER	4/3/2013	069	Employee U,Test	2000
0000000031	0	2/18/2013	1558	TER	4/9/2013	069	Employee BA Jr.,Test	2000
0000000036	0	9/1/2013	1739	TER	9/1/2013	060	Employee GG Jr.,Test W	2000
0000000037	0	8/1/2014	1561	TER	8/1/2014	060	Employee VV III,Test	3000
0000000038	0	11/30/2013	1733	TER	5/21/2014	068	Employee HH,Test Z	2000
0000000039	0	4/1/2014	0158	TER	6/2/2014	057	Employee W,Test	1002
0000000040	0	6/17/2014	0242	TER	7/11/2014	060	Employee YY,Test YY	3000
0000000042	0	2/26/2013	0059	TER	4/1/2013	067	T MTRBF,Test Employee	1000
0000000044	0	6/1/2014	1733	TER	5/28/2014	057	Employee WW III,Test	4000
0000000045	0	2/20/2013	1781	TER	4/1/2013	067	Employee Q,Test	2000
0000000048	0	2/17/2013	0150	TER	4/3/2013	065	Employee XX III,Test	4000
0000000048	1	6/20/2014	0152	TER	5/20/2014	069	Employee XX III,Test	2000
0000000052	0	5/17/2014	0259	TER	5/15/2014	069	Employee CCC,Test A	3002
0000000067	0	4/30/2013	0132	TER	4/3/2013	064	Employee II,Test	2000
0000000068	0	7/14/2014	0158	TER	8/4/2014	065	Employee RR,Test	4000
0000000069	0	3/28/2013	0203	TER	4/3/2013	060	Employee JJ,Test	3001
0000000070	0	6/13/2014	0130	TER	6/13/2014	T60	Employee SS,Test	2000
0000000072	1	10/1/2014	0289	TER	12/3/2014	060	Employee III,Test	1000
0000000076	1	6/2/2014	1733	TER	7/10/2014	060	Employee LLL,Test	4000
0000000080	0	4/1/2013	0164	TER	4/3/2013	060	Employee NN,Test	1000
0000000081	0	8/1/2014	0053	TER	8/1/2014	060	Employee DDD,Test	4000

Step	Action
25.	Click the Close button. 
26.	Congratulations! You have successfully completed this lesson. End of Procedure.

Running an HR Report

Section 5 Exercises, Lesson 2: Running an HR Report

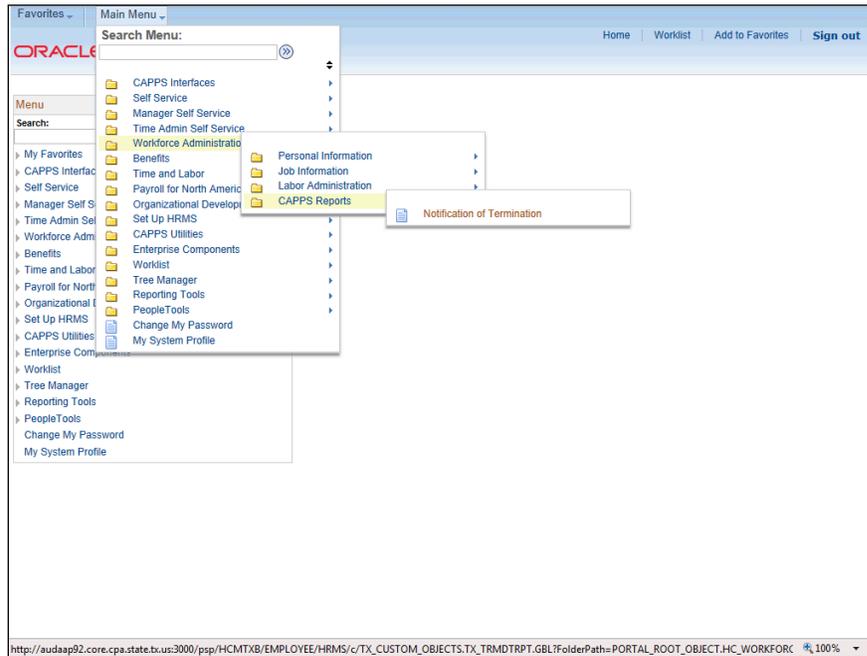
HR Reports are run by means of a Run Control, which is a defined set of parameters that can be saved for future use. These parameter sets are created and saved, and then can be reused as needed to ensure that the report runs consistently each time, or can be changed to meet the current requirements.

Procedure

Reports are run by means of a Run Control, which is a set of parameters that are saved for future use.

In this lesson we will run the Notification of Termination Report, which provides garnishment information for terminated employees.

Please note that the purpose of this lesson is to demonstrate the process of running a report, and does not focus on the content of any specific report. Your access to specific reports depends on the security roles assigned to you.

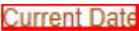


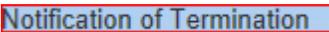
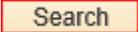
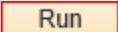
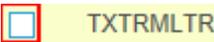
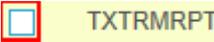
Step	Action
1.	<p>Begin by navigating to the Notification of Termination report.</p> <p>The Navigation is: Main Menu > Workforce Administration > CAPP Reports > Notification of Termination.</p> <p>Click the Notification of Termination menu.</p> 
2.	<p>The first time you run a report, you will need to set up a Run Control, which is a set of parameters used to run a report.</p> <p>Click the Add a New Value tab.</p> 
3.	<p>Click in the Run Control ID field.</p> <p>Run Control ID: </p>

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Step	Action
4.	<p>Give your Run Control a name that will identify this report for future reference.</p> <p>Note: You will only have access to your own Run Controls, so you do not need to include your name or initials.</p> <p>Enter "TermRpt" into the Run Control ID field.</p> <p>Run Control ID: <input type="text"/></p>
5.	<p>Click the Add button.</p> <p></p>
6.	<p>Now set up the parameters for this Run Control.</p> <p>The first parameter is the date range.</p> <p>Click the Choose a date (Alt+5) button.</p> <p></p>
7.	<p>We want to see information about all terminations for the past year, which is the period of March 17, 2014 to March 17, 2015.</p> <p>Open the Month list.</p> <p><input type="text" value="2015"/> </p>
8.	<p>Click the 2014 list item.</p> <p></p>
9.	<p>Click the 17 link.</p> <p></p>
10.	<p>Click the Choose a date (Alt+5) button.</p> <p></p>
11.	<p>Today is March 17, 2015, so you can use the Current Date link to insert that date.</p> <p>Click the Current Date link.</p> <p></p>
12.	<p>Next, select the Company to be included in the report.</p> <p>Click the Look up Company (Alt+5) button.</p> <p></p>
13.	<p>Click the T32 link.</p> <p></p>

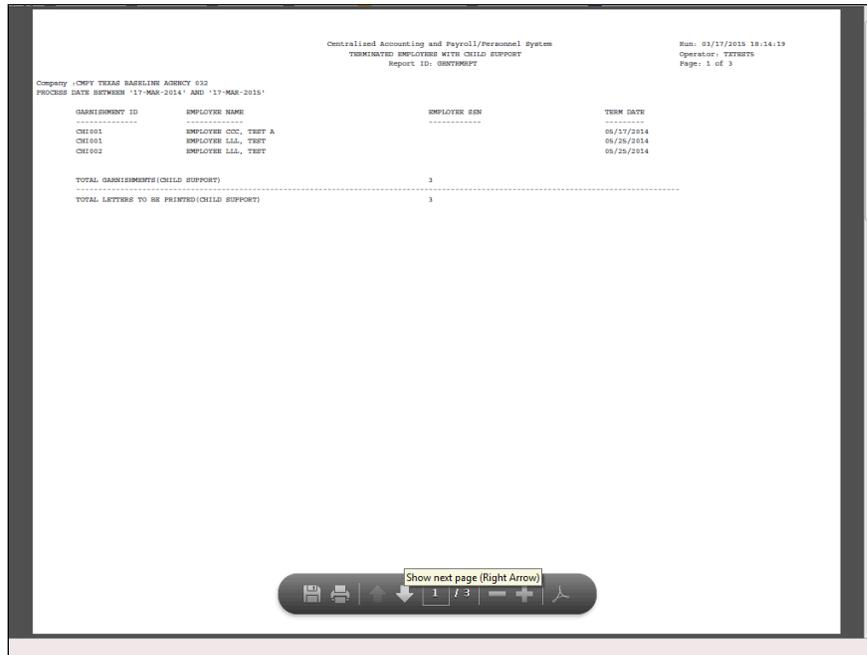
Step	Action
14.	<p>When you have your parameters set, you can save this Run Control for future use.</p> <p>Click the Save button.</p> 
15.	<p>You could go ahead and run this now. But first, let's take a look at how you would find a saved Run Control.</p> <p>Click the Notification of Termination menu to go back to the start.</p> 
16.	<p>Instead of Adding a New Value, this time we're going to Find an Existing Value.</p> <p>Click the Search button to see a list of all Run Controls you have saved.</p> 
17.	<p>You have created three Run Controls to date, and they are all listed here.</p> <p>Click the TermRpt link to run the one you created in this lesson.</p> 
18.	<p>This brings us back to the same Parameters window we were in before. The values you set up and saved in your Run Control are pre-filled for you. You can change these values, or you can run the report as shown.</p>
19.	<p>Click the Run button.</p> 
20.	<p>A report may contain more than one process, as shown here. One process is the Report and the other is the associated Letters. Select either or both, depending on your need.</p> <p>Click the Select option.</p> 
21.	<p>Click the Select option.</p> 
22.	<p>Click the OK button.</p> 

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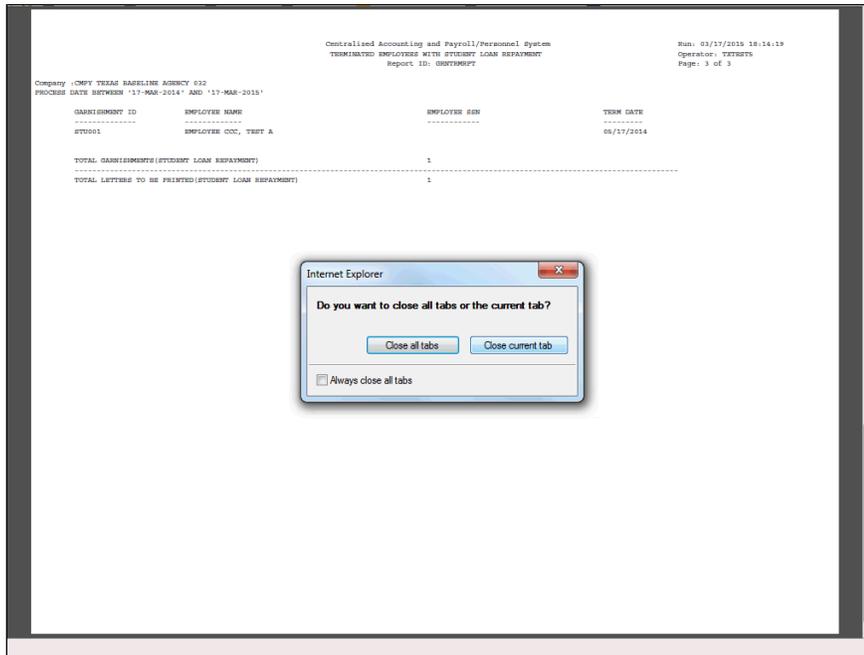
Step	Action
23.	<p>Reports run in the background, so that you can continue working while they run. Your report, reports requested by everyone else in the system, and all of the other processes that the system requires are put into a queue, and run according to the priority of the request and the capacity of the processors.</p> <p>Generally, this happens pretty quickly, but sometimes you may need to be patient.</p> <p>Click the Process Monitor link.</p> <p>Process Monito</p>
24.	<p>The Process Monitor lists your recent requests, both current and past, and allows you to see their status and view the results when they are complete.</p> <p>The most recent requests are on top. As you can see, one of your reports has completed successfully, and the other is still processing.</p>
25.	<p>Note: This screen is not live, and that status will not update automatically, no matter how long you watch it...</p>
26.	<p>After waiting a few seconds or minutes, update the screen by clicking the Refresh button.</p> <p>Refresh</p>
27.	<p>It's still processing.</p> <p>Click the Refresh button again.</p> <p>Refresh</p>
28.	<p>Ok, now it's done! Let's take a look at the results.</p> <p>Click the Details link.</p> <p>Details</p>
29.	<p>The Process Detail screen shows information about the process that just completed.</p> <p>The report we're looking for is part of the Log.</p> <p>Click the View Log/Trace link.</p> <p>View Log/Trace</p>
30.	<p>The default file format is .pdf, so find the file name that ends with that extension, and click on it.</p> <p>Click the txtrm rpt_5492421.PDF link.</p> <p>txtrm rpt_5492421.PDF</p>



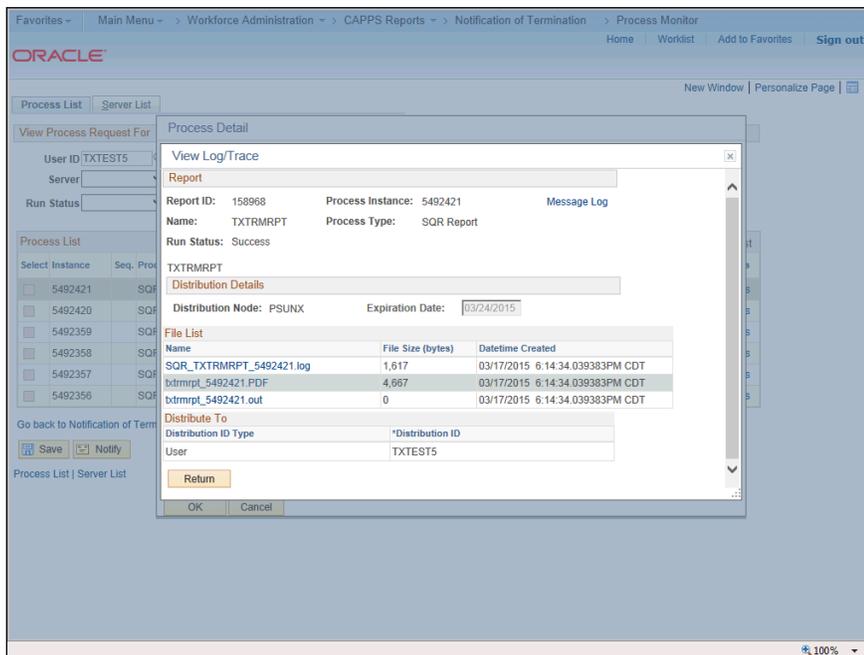
Step	Action
31.	<p>This is what the Terminated Employees report looks like. It lists Terminated Employees who are being garnished for Child Support, Spousal Support, and Student Loan Repayments. Each type of garnishment has its own page. This page shows Child Support.</p> <p>Click the Down Arrow to see the next page.</p> 
32.	<p>This page shows Spousal Support.</p> <p>Click the Down Arrow to see the last page.</p> 
33.	<p>The last page shows Student Loan Repayments.</p>
34.	<p>The report opened in a new window, so you can close it when you're finished reviewing it.</p> <p>Click the Close button.</p> 

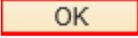
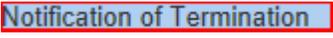
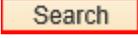
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Step	Action
35.	Click the Close current tab button.

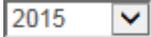
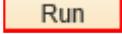
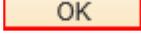
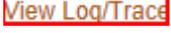


Step	Action
36.	Click the Return button to close the View Log/Trace window. 
37.	Click the OK button to close the Process Detail window. 
38.	What if you want to run your report again, but for a different range of dates? The Run Control that you set up and saved can be reused with different variables. Click the Notification of Termination menu to start over. 
39.	On the Find an Existing Value tab, click in the Run Control ID field. Run Control ID begins with 
40.	Enter the name of your saved Run Control into the Run Control ID field. Enter " TermRpt ". Run Control ID begins with 
41.	Click the Search button. 
42.	The saved parameters are displayed, but can be changed. Let's run the report for the previous year. Click the Choose a date (Alt+5) button. 
43.	Click the list. 
44.	Click the 2013 list item. 
45.	Click the 17 link. 
46.	Click the Choose a date (Alt+5) button. 

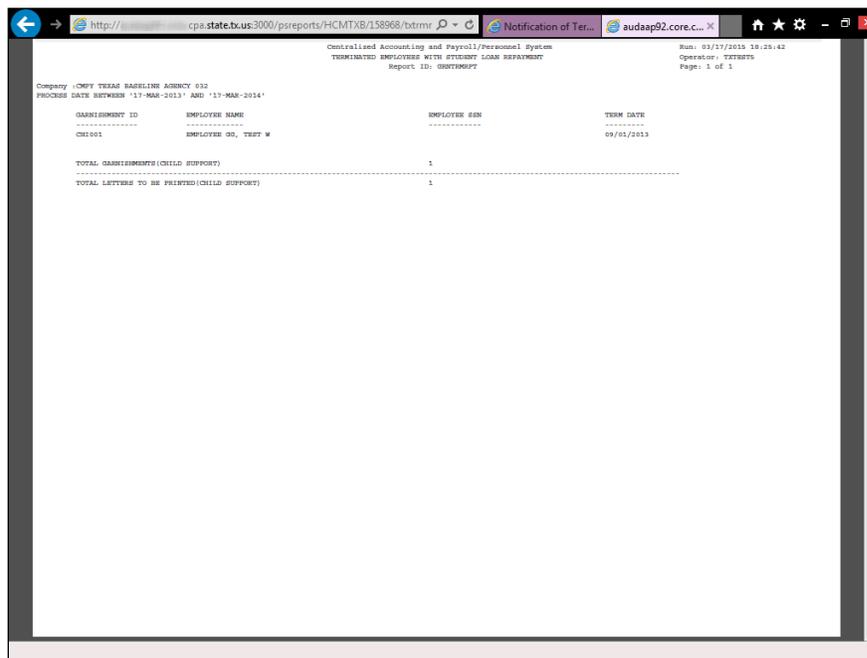
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Step	Action
47.	Click the list. 
48.	Click the 2014 list item. 
49.	Click the 17 link. 
50.	Click the Run button. 
51.	Select the processes you want to run. Click the Select option. 
52.	Click the Select option. 
53.	Click the OK button. 
54.	Now the processes are running, so let's go check on them. Click the Process Monitor link. 
55.	Generally, the sequence of statuses will be Queued, Initiated, Processing, and Success. If the process runs quickly, though, you may not see all of these.
56.	Click the Refresh button to update the status. 
57.	Success! Our report is finished. Click the Details link. 
58.	Remember that our results are in the Log... Click the View Log/Trace link. 

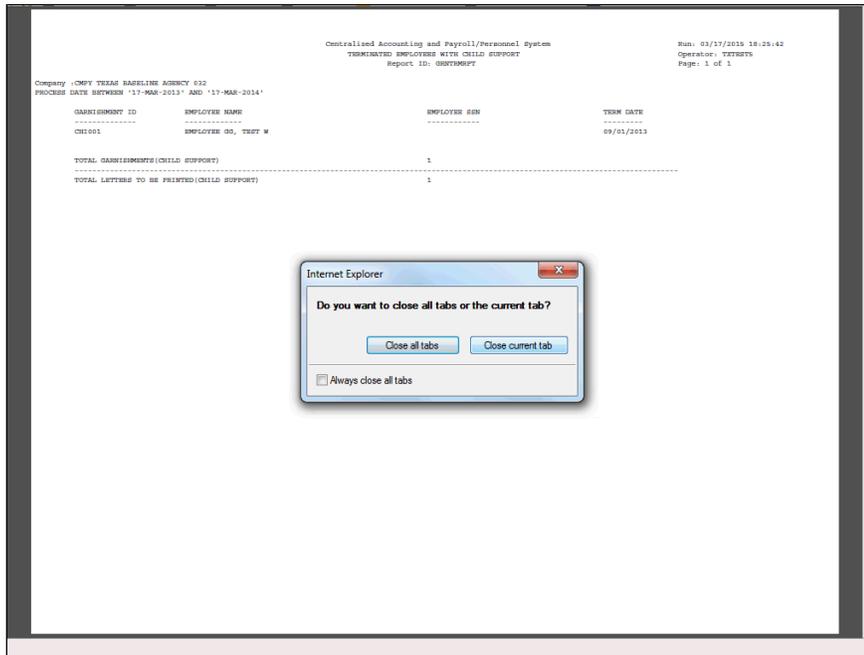
Step	Action
59.	<p>...and that our output is formatted for PDF.</p> <p>Click the txtrmpt_5492425.PDF link.</p> <p>txtrmpt_5492425.PDF</p>
60.	<p>Notice that the date range covered by the report is listed in the header, along with the Company.</p>



Step	Action
61.	<p>Click the Close button.</p> <p></p>

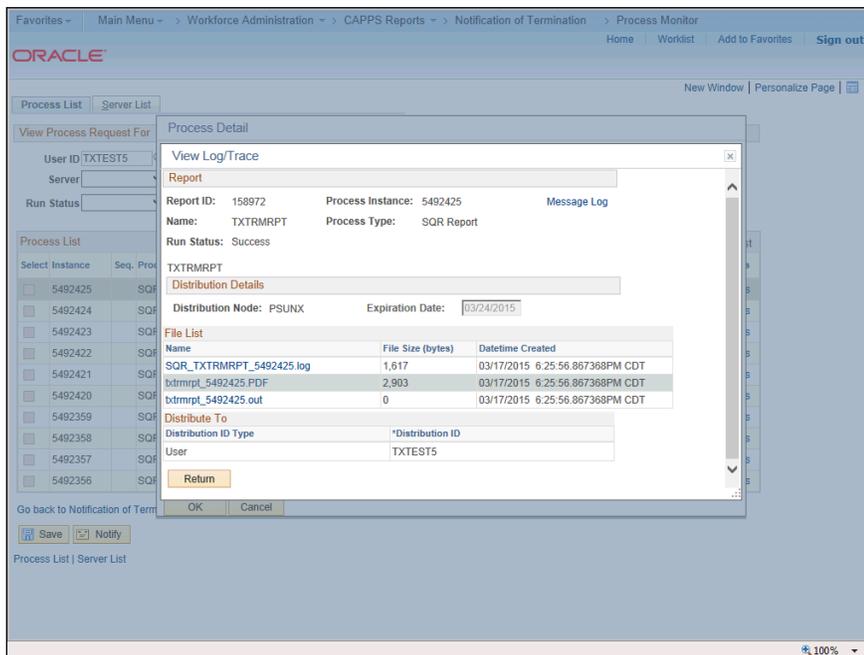
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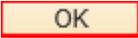
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Step	Action
62.	Click the Close current tab button.

Close current tab



Step	Action
63.	Click the Return button. 
64.	Click the OK button. 
65.	Congratulations! You have successfully completed this lesson. End of Procedure.

Knowledge Check 2

Glossary

Business Unit

Business Unit is a business level between Company (Agency) and Department for reporting and operations.

A Business Unit value is typically the Agency Number appended with two additional characters (*e.g.*, 30400).

Company

Company is a top-level designator. It is equivalent to Agency Number.

Department

A Department in CAPPS continues to identify an operational entity within an agency. Multiple departments can be organized by Business Unit, which is essential for system security as well as position and job information.

HTML

HTML stands for HyperText Markup Language. It is a text description language used for publishing content on an internet web site.

Query

A Query is an interactive tool used to gather information or data from the CAPPS system. Queries are already formulated, and you run them when you need them. The answers are shown in a browser window; alternatively, you can download the data into an Excel spreadsheet.

Run Control ID

A Run Control ID is an identifier that, when paired with a User ID, uniquely identifies a process that is running. The Run Control ID defines parameters or criteria that are used when running the process.

XML

XML stands for Extensible Markup Language. It is a text-based formatting language used to share data on internet and intranet web sites.