CAPPS HR/PAYROLL
End-User Training (EUT)

EUT Course - 130

Human Resource Management

PeopleSoft 9.2

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CAPPS HR

CAPPS Human Resources

Section 2: Hiring Activities

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Creating an Employee and Assigning a Position

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

Procedure

In this lesson, you will learn how to use the CAPPS Custom Hire to add a New Hire and use Job Data to assign a position and compensation.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the New Hire button.

Step 4. The CAPPS Custom Hire process begins with this screen. You will enter the National ID, Company, and Hire date for New Hires and Rehires.

Step 5. The National ID number is the employee's Social Security Number.

You are entering the social security number for the new hire, Eddie Train091.

Enter the desired information into the National ID field. Enter "091991653".

Step 6. 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.

Step 7. Since it did not find a record of previous employment, those fields remain blank for now.

Step 8. Whenever you see a Search icon beside a field, you can click on the icon if you know the field value then you can type it in the field.

Step 9. Enter the desired information into the Company field. Enter "091".

Step 10. Click in the Hire Date field.

Step 11. Enter the desired information into the Hire Date field. Enter "09012019".

Step 12. The date has to be in a MMDDYYYY format or it will error.

Step 13. You can choose to use the Calendar button to select a date as well.

Step 14. Press [Tab].

Step 15. The date will format.

Step 16. Before you click Continue, double-check the National ID and Hire Date.

Step 17. Click the Continue button.

Step 18. Click the Activity Guide Navigation Area button.

Step 19. 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.

Step 20. Since no previous record was found, your next task is to enter the required personal information about the new hire.

Step 21. Real names are not used in the training environment, so for this example, the new employee is Eddie Train091.

Step 22. Click the Add Name button.

Step 23. Click in the First Name field.

Step 24. Enter the desired information into the First Name field. Enter "Eddie".

Step 25. Press [Tab].

Step 26. Press [Tab].

Step 27. Enter the desired information into the Last Name field. Enter "Train091".

Step 28. Click the Refresh Name button.

Step 29. The Refresh button will display the name as it will appear in CAPPS.

Step 30. Tip: Before moving on, double check the spelling, and make sure the first and last names aren't reversed.

Step 31. Click the OK button.

Step 32. Click in the Date of Birth field.

Step 33. Enter the desired information into the Date of Birth field. Enter "09041967".

Step 34. Click in the Birth State field.

Step 35. Click the Look up Birth State (Alt+5) button.

Step 36. Click the scrollbar.

Step 37. Click the MI link.

Step 38. Click the Commissioned Peace Officer option.

Step 39. When an employee is a Commissioned Peace Officer, the Info Release Indicators are automatically designated as Release None and the Protect Indicator field is defaulted.

Step 40. This employee is not a Commission Peace Officer so you will deselect this checkbox.

Step 41. Click the Commissioned Peace Officer option.

Step 42. Click the OK button.

Step 43. Click the Release All option.

Step 44. Click the Protect Indicator list.

Step 45. This is the list of Protector Indicators and what triggers each to be set:

- Not Protected

01 – Protected by Statute

02 – Current/Former Commissioned Peace Officer Only

03 – Current/Former Protected Agency (i.e. All the Courts, Texas Military Dept)

04 – CPO + Protected Agency

05 – Other Protection – Employment (i.e. Any Elected Official and Protected Department/Job Code)

Note: The only protect indicator that can be selected by the end user is Protect Indicator 01 – Protected by Statute.

Step 46. Click the Not Protected list item.

Step 47. Click the Gender list.

Step 48. Click the Male list item.

Step 49. Click the Highest Education Level list.

Step 50. Click the Master's Level Degree list item.

Step 51. Click the Marital Status list.

Step 52. Click the Married list item.

Step 53. Click the scrollbar.

Step 54. National ID, at the bottom of the page, has been filled in from the previous screen.

Step 55. Double-check to make sure that the ID number is correct before moving on.

Step 56. Next, you will enter information of the Contact Information page.

Step 57. There is a Contact Information Link here and also a Contact Information Tab at the top of the page.

Step 58. No scrolling from here when you use this link.

Step 59. Click the Contact Information link.

Step 60. The Contact Information tab holds Address, Phone, and Email information.

Step 61. Click the Add Address Detail link.

Step 62. Click the Add Address link.

Step 63. Enter Eddie's address into the Address 1 field.

Step 64. Enter the desired information into the Address 1 field. Enter "1122 Train St".

Step 65. Press [Tab].

Step 66. Press [Tab].

Step 67. Enter the desired information into the City field. Enter "Austin".

Step 68. Click in the State field.

Step 69. Enter the desired information into the State field. Enter "TX".

Step 70. Click in the Postal field.

Step 71. Enter the desired information into the Postal field. Enter "78711".

Step 72. Use the Lookup icon to find the County code.

Step 73. Click the Look up County (Alt+5) button.

Step 74. Click the Search by list.

Step 75. Click the Description list item.

Step 76. Enter the desired information into the begins with field. Enter "travis".

Step 77. Click the Search button.

Step 78. Click the Travis County link.

Step 79. Click the OK button.

Step 80. The address you just entered displays in the Address History field.

Step 81. Click the Phone Type list.

Step 82. Click the Personal Cell list item.

Step 83. Enter the desired information into the Telephone field. Enter "5129900000".

Step 84. Do not enter a Business email as part of the CAPPS Custom Hire process. This information will be updated via the business email interface.

Step 85. If the employee chooses to have a Home email on file, they can add it using Employee Self Service.

Step 86. Click the scrollbar.

Step 87. Do not enter a business or personal email address as part of the CAPPS Custom Hire.

Step 88. This information will be updated via the Business Email Interface.

Step 89. The employee can enter their Home email via Employee Self Service.

Step 90. Click the Regional link.

Step 91. The Regional tab holds information related to Ethnicity, Citizenship, Military Status, etc.

Step 92. You will select the Ethnicity for the employee.

Step 93. Click the Ethnic Group button.

Step 94. Click the Black link.

Step 95. This employee is not a Veteran.

Step 96. Click the Military Status button.

Step 97. Click the Not a Veteran list item.

Step 98. Click the scrollbar.

Step 99. Click the Organizational Relationships button.

Step 100. 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.

Step 101. Notice, also that the Person ID still says "NEW".

Step 102. An Empl ID has not yet been issued.

Step 103. Do NOT proceed to the next step unless you have double-checked that your National ID and Hire Date are correct.

Step 104. The Personal Data record will be saved in the next step, creating a permanent record for that ID number and hire date.

Step 105. To save the record and generate the Empl ID,

Step 106. Click the Add Relationship button.

Step 107. The Empl ID number now appears, and the employee record has been saved.

Step 108. Next you will enter the position information for the new employee.

Step 109. Notice that the Effective Date and Action code are already entered and cannot be changed.

Step 110. Both of these values came from the CAPPS Custom Hire page.

Step 111. Click the Action Reason Code button.

Step 112. 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.

Step 113. 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.

Step 114. Click the 010 link.

Step 115. The Position record has been set up in advance and contains most of the information the system needs for Mr. Eddie.

Step 116. Click in the Position Number field.

Step 117. Eddie has been hired as an Executive Assistant III.

Step 118. Enter the desired information into the Position Number field. Enter "00006278".

Step 119. When you press the tab key, the system will verify the position number and import position information into various fields.

Step 120. Press [Tab].

Step 121. Notice that the Position information automatically populates.

Step 122. Click the Job Information tab.

Step 123. Verify that the Job Information has populated correctly, including description, Supervisor level, and standard hours.

Step 124. The Job Labor tab is not being used.

Step 125. Click the Payroll tab.

Step 126. Verify that the correct Pay Group has been selected or select the appropriate value, if your Agency has more than one option.

Step 127. Verify that Employee Type is selected.

Step 128. Click the Salary Plan tab.

Step 129. The Salary Plan and Grade also came from the Position record.

Step 130. Verify that they are correct.

Step 131. Click the Compensation tab.

Step 132. The actual rate of Eddie's compensation must be entered manually.

Step 133. Comp Rate is always entered on a Monthly or Semi-Monthly basis.

Step 134. Click the scrollbar.

Step 135. Click the scrollbar.

Step 136. Eddie will be paid $4,023.61 per month.

Step 137. Click in the Comp Rate field.

Step 138. Enter the desired information into the Comp Rate field. Enter "4023.61".

Step 139. The Calculate Compensation button must be clicked prior to saving the record.

Step 140. Click the Calculate Compensation button.

Step 141. The calculated compensation rate is now displayed.

Step 142. Click the OK button.

Step 143. The system returns you to the Organizational Relationship screen. The initial hiring process is complete.

Step 144. The hire is now saved. Any changes to Personal or Job Data must be made in the applicable core Job Data Pages.

Step 145. Do not try to rehire to make data changes.

Step 146. Congratulations! You have completed this lesson.

New Hire Profile: Emergency Contact Information

Section 1 Exercises, Lesson 2: New Hire Profile: Emergency Contact Information

Procedure

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

Employees are able to update this information in Employee Self-Service.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the Personal Data button.

Step 4. Click the Emergency Contact link.

Step 5. You will enter the employee ID for the employee. In this case, the employee is Eddie Train091.

Step 6. Enter the desired information into the Empl ID field. Enter "70911000662".

Step 7. Click the scrollbar.

Step 8. Click the Search button.

Step 9. Click the Activity Guide Navigation Area button.

Step 10. The Emergency Contact name is Edith Train091.

Step 11. Click in the Contact Name field.

Step 12. Enter the desired information into the Contact Name field. Enter "Edith Train091".

Step 13. Click the Primary Contact option.

Step 14. Click the Same Address as Employee option.

Step 15. Click the scrollbar.

Step 16. Click the Relationship to Employee list.

Step 17. Click the Spouse list item.

Step 18. Click the scrollbar.

Step 19. Click the scrollbar.

Step 20. Click in the Phone field.

Step 21. Enter the desired information into the Phone field. Enter "5121110000".

Step 22. Click the Save button.

Step 23. Congratulations! You have completed this lesson.

Section 3: Transfers, Moves, and Terminations

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Transferring to a Different Agency

Section 3 Exercises, Lesson 1: Transferring to a Different Agency

Procedure

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

In this lesson, you will learn how to terminate an employee that is transferring from your agency and see how the employee is transferred/hired into a different agency.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. Nicole Train091 is transferring to a different agency.

Step 5. Enter the desired information into the Empl ID field. Enter "70911000668".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Add a new row at row 1 (Alt+7) button.

Step 10. The effective date of the transfer is the current date 5/11/2020.

Step 11. In order to transfer Ms. Train091 to another agency, you must first terminate her from your current agency and coordinate with the gaining agency to make sure the rehire is entered for the correct Effective Date.

Step 12. Note: The agency that she is transferring to should not rehire her until after the termination is entered by the other agency.

Step 13. Open the Action list.

Step 14. Click the Action list.

Step 15. Click the Termination list item.

Step 16. Click the Look up Reason Code (Alt+5) button.

Step 17. Click the 065 link.

Step 18. Click the scrollbar.

Step 19. Click the Save button.

Step 20. Once the system has completed processing the termination, the hiring agency (068), will hire Ms. Train091 in her new position, effective the same day as the termination.

Step 21. Let's walk through the steps the hiring agency takes to process the transfer.

Step 22. Click the Workforce Administration button.

Step 23. Click the New Hire button.

Step 24. When an employee is transferring into your agency, you begin your part of the process by Rehiring them.

Step 25. 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.

Step 26. Rehires are performed through the CAPPS Custom Hire page.

Step 27. Enter the Social Security Number for the transferring employee.

Step 28. Enter the desired information into the National ID field. Enter "01991659".

Step 29. If CAPPS recognizes this National ID number, it will fill in the Empl ID and the Name right away.

Step 30. Enter the desired information into the Company field. Enter "068".

Step 31. Click the Calendar Hire Date (Alt+5) button.

Step 32. The hire date will be the same as the termination effective date used at the other agency.

Step 33. Click the 11 button.

Step 34. Click the Continue button.

Step 35. Click the OK button.

Step 36. Click the Activity Guide Navigation Area button.

Step 37. You will update any personal information that may have changed on each of the tabs.

Step 38. You can reselect the Info Release Indicators. The employee can choose to change them.

Step 39. Click the Release None option.

Step 40. Click the Contact Information tab.

Step 41. You can change their phone number or address, if applicable.

Step 42. Click the Organizational Relationships tab.

Step 43. Click the Add Relationship button.

Step 44. Now you can finish up the transfer/hire in Job Data.

Step 45. Click the Look up Reason Code (Alt+5) button.

Step 46. The code for this transfer is Inter-Agency Transfer In (012).

Step 47. Click the 012 link.

Step 48. This employee will transfer to an Executive Assistant III position. In this example, its the same position title as the old agency however the Position Number will change to those assigned to your agency.

Step 49. Enter the desired information into the Position Number field. Enter "00005623".

Step 50. Press [Tab].

Step 51. Click the Job Information tab.

Step 52. Click the Compensation tab.

Step 53. Click the scrollbar.

Step 54. Click the scrollbar.

Step 55. The compensation for this employee is $4023.61.

Step 56. Enter the desired information into the Comp Rate field. Enter "4023.61".

Step 57. Click the Calculate Compensation button.

Step 58. Click the OK button.

Step 59. This is telling you that the Agency Transfer From field was not entered. So go back and fill it in.

Step 60. Click the OK button.

Step 61. Click the scrollbar.

Step 62. Click the Job Data link.

Step 63. Click the scrollbar.

Step 64. Click the scrollbar.

Step 65. You must enter the agency number that this employee transferred from.

Step 66. Enter the desired information into the Agency Transfer From field. Enter "091".

Step 67. Click the scrollbar.

Step 68. Click the OK button.

Step 69. The transfer is complete.

Step 70. Congratulations! You have completed this lesson.

Prior State Service Row Insertion

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

Procedure

Whenever an employee transfers from one agency to another or leaves an agency and comes back later, a row must be added in Prior State Service 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.

In this lesson, you will learn how to enter Prior State Service.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. You will enter the Empl ID for Jeff Train04.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000042".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. To view or enter Prior State Service rows, you will go to the Employment Data page.

Step 10. The link for Employment Data is at the bottom of the Job Data page.

Step 11. Click the scrollbar.

Step 12. Click the Employment Data link.

Step 13. Click the Prior State Service tab.

Step 14. The Prior State Service shows that Jeff Train04 has not worked for any other agencies. However, not all service may appear immediately following the hire.

Step 15. A daily process inserts the most recent prior period of employment in CAPPS.

Step 16. If the most recent period of service was outside of CAPPS Central, then the Agencies must validate and manually insert that period of service.

Step 17. 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.

Step 18. This employee doesn't have any existing Prior State Service rows therefore you can begin entries on the first row.

Step 19. Jeff worked for the TXDOT (601) from January 1, 2019 to March 31, 2019.

Step 20. Enter the desired information into the Agency field. Enter "601".

Step 21. Click in the Hire Date field.

Step 22. Enter the desired information into the Hire Date field. Enter "01012019".

Step 23. Click in the Term Date field.

Step 24. Enter the desired information into the Term Date field. Enter "03312019".

Step 25. Click the scrollbar.

Step 26. Note: If there was an existing row for Prior State Service, you would have added a new row to make this entry.

Step 27. Never type over information that is existing. It will delete the history for the employee's record.

Step 28. Click the scrollbar.

Step 29. Click the Save button.

Step 30. Notice that the Total Prior State Service row updated when the record was saved.

Step 31. Congratulations! You have completed this lesson.

Moving within the Same Agency

Section 3 Exercises, Lesson 3: Moving within the Same Agency

Procedure

When an employee moves from one position to another within the same agency, it is considered a Move.

In this lesson, you will learn how to process an employee moving into another position with the same job title in a different department. There is no change in salary.

Step 1.	Click the Employee Self Service button.
Step 2.	Click the Workforce Administration menu.
Step 3.	Click the HR Administration button.
Step 4.	The Accountant III within this agency has resigned and Richard Train064 has been chosen to move into the position.
Step 5.	Enter the desired information into the Empl ID field. Enter "70641000049".
Step 6.	Click the scrollbar.
Step 7.	Click the Search button.
Step 8.	Click the Activity Guide Navigation Area button.
Step 9.	Click the Add a new row at row 1 (Alt+7) button.
Step 10.	This Move will be effective on 5/1/2020.
Step 11.	Click the Calendar Effective Date (Alt+5) button.
Step 12.	Click the list.
Step 13.	Click the May list item.
Step 14.	Click the 1 button.
Step 15.	Click the Action list.
Step 16.	Click the Data Change list item.
Step 17.	In this example, the Reason Code that you will use is X38 - Employee Transfer Initiated. You will use the first four digits of the same job title, so only the dpt and location will change for this position.
Step 18.	Click the Look up Reason Code (Alt+5) button.
Step 19.	Click the scrollbar.

Step 20. Click the X38 - Transfer Employee Initiated link.

Step 21. Click in the Position Number field.

Step 22. The new job code ha the same first four digits of the same job title.

Step 23. Enter the desired information into the Position Number field. Enter "00006020".

Step 24. The employee is currently in Dpt 2000.

Step 25. Press [Tab].

Step 26. Now, the employee is in Dept. 1000 - Executive Administration.

Step 27. Nothing else should be changed, but you should still validate the position attributes on the other tabs.

Step 28. Click the Job Information tab.

Step 29. Verify that the Payroll information is correct.

Step 30. Click the Salary Plan tab.

Step 31. The Plan and Grade did not change for this move. Verify that the data on the Salary Plan tab are correct.

Step 32. Click the Compensation tab.

Step 33. Click the scrollbar.

Step 34. Click the scrollbar.

Step 35. There is no change in compensation in this case.

Step 36. Click the Save button.

Step 37. Congratulations! You have completed this lesson.

Entering a Termination

Section 3 Exercises, Lesson 4: Entering a Termination

Procedure

When entering a termination, the basic steps followed are the same for each termination type. However, the Action Reason Code may differ.

In this lesson, you will learn how to enter a termination for an employee that is retiring.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. Brian Train064 has decided to retire from the agency.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000059".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Add a new row at row 1 button.

Step 10. The termination will be effective May 1st and the last day worked was 4/31.

Step 11. For other termination types, the Effective Date selected should be one day after the last day for which they are paid.

Step 12. Click the Calendar Effective Date button.

Step 13. Click the list.

Step 14. Click the May list item.

Step 15. Click the 1 button.

Step 16. Click the Action list.

Step 17. Click the Termination list item.

Step 18. Click the Look up Reason Code (Alt+5) button.

Step 19. Click the 068 link.

Step 20. Click the scrollbar.

Step 21. Notice the last date physically worked populates for you. Be sure to check this before saving to ensure you used the correct effective date.

Step 22. Click the Save button.

Step 23. Congratulations! You have completed this lesson.

Section 4: Personal, Position and Job Data Changes

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Searching for an Employee by National ID

Section 4 Exercises, Lesson 1: Searching for an Employee by Name and National ID

Procedure

In this lesson, you will learn how to search for an employee using their National ID Number (Social Security Number).

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the CAPPS Employee Search button.

Step 4. You are searching for the national ID number for Joe Train064. You can search for him by entering a few characters of his last name.

Step 5. Click in the Last Name field.

Step 6. Enter the desired information into the Last Name field. Enter "train".

Step 7. Click the Search button.

Step 8. There are quite a few employees within this agency that begin with the last name "Train".

Step 9. Click the scrollbar.

Step 10. In this example, you are looking for Joe Train064.

Step 11. Click the 70641000042 link.

Step 12. The employee's Empl Id, Social Security Number and certain job information displays.

Step 13. Click the Return to Search button.

Step 14. We can also look up Joe Train064 by using his national ID number.

Step 15. Click the Clear button.

Step 16. Enter the national ID number for Jeff Train064.

Step 17. Click in the National ID field.

Step 18. Enter the desired information into the National ID field. Enter "064991034".

Step 19. Click the Search button.

Step 20. The social security number is for Jeff Train064. Jeff's Empl Id, Social Security Number and HR information is listed.

Step 21. Congratulations! You have completed this lesson.

Changing an Employee's Name and Marital Status

Section 4 Exercises, Lesson 2: Changing an Employee's Name and Marital Status

Procedure

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

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the Personal Data button.

Step 4. You will update the last name and marital status for Jada Train064.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000046".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. You must add a new row before entering the new name. This preserves the history of information.

Step 10. Click the Add a new row at row 1 (Alt+7) button.

Step 11. The effective date for the change is 4/1/2020.

Step 12. Click the Calendar Effective Date (Alt+5) button.

Step 13. Click the 1 button.

Step 14. Click the Edit Name button.

Step 15. Click in the Last Name field.

Step 16. Click the (x) to clear out the Last Name field.

Step 17. Click in the Last Name field.

Step 18. Enter the desired information into the Last Name field. Enter "Trainchange064".

Step 19. Click the Refresh Name button.

Step 20. Make sure that the name displays correctly.

Step 21. Click the OK button.

Step 22. Click the scrollbar.

Step 23. The Biographic History section is where the Marital Status updated. It is separate from the Name section above, therefore you will add new row here as well to preserve the Biographical History.

Step 24. Click the Add a new row at row 1 (Alt+7) button.

Step 25. Click the Calendar Effective Date (Alt+5) button.

Step 26. Click the 1 button.

Step 27. Click the Marital Status list.

Step 28. Click the Married list item.

Step 29. When Marital Status is changed, the As of Date will automatically update to the Biographical History effective date.

Step 30. This field will update after the record is saved.

Step 31. Click the scrollbar.

Step 32. Click the Save button.

Step 33. Congratulations! You have completed this lesson.

Changing an Address and Phone Number

Section 4 Exercises, Lesson 3: Changing an Address or Phone Number

Procedure

In this lesson, you will learn how to update an employee's address and phone number.

Note: Employees are expected to make updates themselves using Employee Self-Service. In some cases, HR may need to assist.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the Personal Data button.

Step 4. You are going to update the address and phone number for Jada Trainchange064.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000046".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Contact Information tab.

Step 10. Click the Add a new row at row 1 (Alt+7) button.

Step 11. Click the Address Type list.

Step 12. Click the Home list item.

Step 13. Click the Add Address Detail link.

Step 14. Click the Calendar Effective Date (Alt+5) button.

Step 15. Click the 1 button.

Step 16. 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!

Step 17. Click the Add Address link.

Step 18. Enter the desired information into the Address 1 field. Enter "123 Change Street".

Step 19. Click in the City field.

Step 20. Enter the desired information into the City field. Enter "Austin".

Step 21. Click in the State field.

Step 22. Enter the desired information into the State field. Enter "TX".

Step 23. Click in the Postal field.

Step 24. Enter the desired information into the Postal field. Enter "78711".

Step 25. Click the Look up County (Alt+5) button.

Step 26. Click in the Description field.

Step 27. Enter the desired information into the Description field. Enter "travis".

Step 28. Click the Search button.

Step 29. Click the 227 link.

Step 30. Click the OK button.

Step 31. Double-check the address that appears.

Step 32. Click the OK button.

Step 33. Notice that the address you just entered appears on the second row with a current As Of Date and the previous address was saved for historical purposes.

Step 34. Next, we're going to add a phone number.

Step 35. Since there are no phone types entered, there is no need to add a new row.

Step 36. Click the Phone Type list.

Step 37. Click the Personal Cell list item.

Step 38. Click in the Telephone field.

Step 39. Enter the desired information into the Telephone field. Enter "5121111111".

Step 40. Click the Preferred object.

Step 41. Click the Preferred option.

Step 42. Click the scrollbar.

Step 43. Click the Save button.

Step 44. Congratulations! You have completed this lesson.

Updating the Information Release Indicator

Section 4 Exercises, Lesson 4: Updating the Information Release Indicator

Procedure

In this lesson, you will learn how to update the Information Release Indicators.

Depending on your agency policy, the indicators should be set to 'Yes' when the employee is hired but can be changed by the employee through Employee Self Service.

In some instances, HR may need to make these changes.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the Personal Data button.

Step 4. You will update the Information Release Indicators for Thea Train064.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000048".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the scrollbar.

Step 10. There is a separate indicator for each type of release option. Depending on your agency policy, the 'Release All' option will be checked.

Step 11. Employees can change these settings in Employee Self Service.

Step 12. Thea Train064 does not want any of her information released.

Step 13. Click the Release None option.

Step 14. The Protect Indicator field is used for Commissioned Peace Officers.

Step 15. Click the Protect Indicator list.

Step 16. Thea Train064 is not protected by Statute therefore the selection should remain 'Not Protected'.

Step 17. Click the Not Protected list item.

Step 18. Click the scrollbar.

Step 19. Click the Save button.

Step 20. Congratulations! You have completed this lesson.

Viewing the BRP Indicator and Time Reporter Data

Section 4 Exercises, Lesson 5: Viewing the BRP Indicator and Time Reporter Information

Procedure

In this lesson, you will learn how to view the BRP Indicator and Time Reporter Data for an employee.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. You will be viewing the information for Thea Train064.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000048".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. The Time Reporter Data and BRP indicator links are located on the Employment Data screen.

Step 10. Click the scrollbar.

Step 11. Click the Employment Data link.

Step 12. Click the scrollbar.

Step 13. Click the Time Reporter Data link.

Step 14. 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.

Step 15. Click the Close button.

Step 16. Click the Employee BRP Indicator link.

Step 17. The current BRP setting is displayed and the effective date.

Step 18. Click the OK button.

Step 19. Congratulations! You have completed this lesson.

Viewing History and Total Compensation

Section 4 Exercises, Lesson 6: Viewing Compensation History and Total

Procedure

In the lesson, you will learn how to view an employee History and Total Compensation.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. Click the Compensation button.

Step 5. Click the Compensation History link.

Step 6. You are viewing Compensation information for Richard Train064.

Step 7. Enter the desired information into the begins with field. Enter "70641000049".

Step 8. Click the Search button.

Step 9. Click the Activity Guide Navigation Area button.

Step 10. The Salary History box shows Date of Change, Job Title, Company, Empl Status, Department, Action, Reason, Annual Salary and Compensation per Frequency.

Step 11. The bottom of the page also shows One Time Payments, as applicable.

Step 12. The To Date will default to the current date. You may change it as needed. For this example, you will use from 01/01/2019 to 12/31/2019.

Step 13. Click in the From field.

Step 14. Click the (x) to clear the field.

Step 15. Click in the From field.

Step 16. Enter the desired information into the From field. Enter "01012019".

Step 17. Click in the To Date field.

Step 18. Click in the To Date field.

Step 19. Enter the desired information into the To Date field. Enter "12312019".

Step 20. You must use the Refresh Data button to refresh the Salary History according to the date range entered.

Step 21. Click the Refresh Data button.

Step 22. Click the scrollbar.

Step 23. Click the scrollbar.

Step 24. More details can be viewed by selecting the Date of Change.

Step 25. Click the 09/01/2019 link.

Step 26. Click the scrollbar.

Step 27. Click the Return to Compensation History link.

Step 28. Click the Activity Guide Navigation Area button.

Step 29. Click the Total Compensation button.

Step 30. Click the Activity Guide Navigation Area button.

Step 31. In this example, you will use 1/1/2020 for the effective date.

Step 32. Click the Calendar button.

Step 33. Click the Month list.

Step 34. Click the January list item.

Step 35. Click the 1 button.

Step 36. Click the Refresh Data button.

Step 37. 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.

Step 38. In addition, a promotion and/or salary change would result in a different base salary depending on the effective date selected.

Step 39. Click the Workforce Administration button.

Step 40. Congratulations! You have completed this lesson.

Promoting an Employee

Section 4 Exercises, Lesson 7: Promoting an Employee

Procedure

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

In this lesson, you will learn how to process a promotion.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. James Train064 has earned a promotion!

Step 5. Enter the desired information into the Empl ID field. Enter "70641000050".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Add a new row at row 1 (Alt+7) button.

Step 10. James Train064 promotion will be effective May 1, 2020.

Step 11. Click the Calendar Effective Date (Alt+5) button.

Step 12. Click the list.

Step 13. Click the May list item.

Step 14. Click the 1 button.

Step 15. Click the Action list.

Step 16. Click the Promotion list item.

Step 17. Click the Look up Reason Code (Alt+5) button.

Step 18. Click the 020 link.

Step 19. Click the OK button.

Step 20. James Train064 is being promoted to a HR Specialist IV (Position Number - 6028).

Step 21. You can enter the new Position Number in the field or search for it.

Step 22. Click the Look up Position Number (Alt+5) button.

Step 23. Click the scrollbar.

Step 24. Click the 00006028 link.

Step 25. Information about the new position will populate when you press the Tab key.

Step 26. Press [Tab].

Step 27. Click the Job Information tab.

Step 28. Verify that the new Job Information has been entered correctly.

Step 29. Click the Payroll tab.

Step 30. Verify that the Payroll setup is correct.

Step 31. Click the Salary Plan tab.

Step 32. Verify the Salary Plan information, and make a note of the Plan and Grade level.

Step 33. Click the Compensation tab.

Step 34. Click the scrollbar.

Step 35. Click the scrollbar.

Step 36. 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.

Step 37. Click in the Comp Rate field.

Step 38. Click the (x) to clear the field.

Step 39. Click in the Comp Rate field.

Step 40. Enter the desired information into the Comp Rate field. Enter "5250".

Step 41. You must click the Calculate Compensation button or the compensation will not be correctly calculated and saved.

Step 42. Click the Calculate Compensation button.

Step 43. Click the Save button.

Step 44. Click the OK button.

Step 45. Congratulations! You have completed this lesson.

Demoting an Employee

Section 4 Exercises, Lesson 8: Demoting an Employee

Procedure

In this lesson, you will learn how to process a demotion.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. Penny Train064 is being demoted to a different position and lower compensation rate.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000051".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Add a new row at row 1 (Alt+7) button.

Step 10. The effective date for this demotion is May 1 2020.

Step 11. Click in the Effective Date field.

Step 12. Enter the desired information into the Effective Date field. Enter "05012020".

Step 13. Click the Action list.

Step 14. Click the Demotion list item.

Step 15. Click the Look up Reason Code (Alt+5) button.

Step 16. Click the 021 link.

Step 17. Click the OK button.

Step 18. Click in the Position Number field.

Step 19. Click the (x) to clear the field.

Step 20. Click in the Position Number field.

Step 21. Enter the desired information into the Position Number field. Enter "00006020".

Step 22. Press [Tab].

Step 23. Click the Compensation tab.

Step 24. Click the scrollbar.

Step 25. Click the scrollbar.

Step 26. The new rate will be $3,100.

Step 27. Click in the Comp Rate field.

Step 28. Click the (x) to clear the Comp Rate field.

Step 29. Click in the Comp Rate field.

Step 30. Enter the desired information into the Comp Rate field. Enter "3100".

Step 31. Click the Calculate Compensation button.

Step 32. Click the Save button.

Step 33. Congratulations! You have successfully completed this lesson.

Temporary Assignments

Section 4 Exercises, Lesson 9: Temporary Assignments

Procedure

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.

In this lesson, you will learn how to place an employee on a Temporary Assignment and end the Temporary Assignment.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. Cynthia Train064 is going to be working a Temporary Assignment as an Acct IV.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000047".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Add a new row at row 1 (Alt+7) button.

Step 10. The Temp Assignment will start on 4/1/2020.

Step 11. Click the Calendar Effective Date (Alt+5) button.

Step 12. Click the 1 button.

Step 13. The Action Code for a Temporary Assignment is Data Change.

Step 14. Click the Action list.

Step 15. Click the Data Change list item.

Step 16. Click the Look up Reason Code (Alt+5) button.

Step 17. Click the 041 link.

Step 18. Click the OK button.

Step 19. Now you must change the Position Number to the one for the temporary assignment. You will use 00006021.

Step 20. Click the Look up Position Number (Alt+5) button.

Step 21. Click the scrollbar.

Step 22. Click the 00006021 link.

Step 23. Press [Tab].

Step 24. Click the Compensation tab.

Step 25. Click the scrollbar.

Step 26. Click the scrollbar.

Step 27. This temporary assignment comes with an increase in the rate.

Step 28. Click in the Comp Rate field.

Step 29. Enter the desired information into the Comp Rate field. Enter "4000".

Step 30. Click the Calculate Compensation button.

Step 31. Click the Save button.

Step 32. Click the OK button.

Step 33. When the assignment is over, another row should be added to end the temporary assignment and place Cynthia back into her previous position.

Step 34. Click the Workforce Administration button.

Step 35. Cynthia Train064 temporary assignment effective end date is 5/1/2020.

Step 36. 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.

Step 37. Click the HR Administration button.

Step 38. Enter the desired information into the Empl ID field. Enter "70641000047".

Step 39. Click the scrollbar.

Step 40. Click the Search button.

Step 41. Click the Activity Guide Navigation Area button.

Step 42. Add a new row to end the Temporary Assignment.

Step 43. Click the Add a new row at row 1 (Alt+7) button.

Step 44. The End Date for a temporary assignment works just like terminations. The Temporary Assignment End Day is the last day paid through plus one day.

Step 45. Click in the Effective Date field.

Step 46. The last date paid in this assignment is 4/30/2020 therefore the effective end date is 5/1/2020.

Step 47. Enter the desired information into the Effective Date field. Enter "05012020".

Step 48. Click the Look up Reason Code (Alt+5) button.

Step 49. Click the OK button.

Step 50. Click the 042 link.

Step 51. Click the OK button.

Step 52. You will enter their previous Position Number.

Step 53. Click in the Position Number field.

Step 54. Click in the Position Number field.

Step 55. Enter the desired information into the Position Number field. Enter "00005571".

Step 56. Press [Tab].

Step 57. Click the Compensation tab.

Step 58. Click the scrollbar.

Step 59. Click the scrollbar.

Step 60. You will put their salary back to their former rate.

Step 61. Click in the Comp Rate field.

Step 62. Click in the Comp Rate field.

Step 63. Enter the desired information into the Comp Rate field. Enter "2748".

Step 64. Click the Calculate Compensation button.

Step 65. Click the Save button.

Step 66. Congratulations! You have completed this lesson.

Entering a Leave of Absence

Section 4 Exercises, Lesson 10: Entering a Leave of Absence

Procedure

Leave of Absence transactions can be entered within Manager Self-Service (Full), if that function is available to your Agency. If not, an HR user can process Leave of Absence transactions.

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

In this lesson, you will learn how to put an employee on Leave of Absence and Return From Leave.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. Jason Train064 is going on a Leave of Absence effective April 1, 2020.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000053".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Add a new row at row 1 (Alt+7) button.

Step 10. Click the Calendar Effective Date (Alt+5) button.

Step 11. Click the 1 button.

Step 12. Click the Action list.

Step 13. Click the Leave of Absence list item.

Step 14. Click the Look up Reason Code (Alt+5) button.

Step 15. 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:

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

Step 16. Note that for FMLA and Parental Leave are no longer entered in Job Data. An event should be created and the FMLA Event ID will be tracked on the Timesheet. The FMLA Plan IDs that are tracked on the timesheet are: FML, MCL, and PAR.

Step 17. Click the 043 link.

Step 18. Click the scrollbar.

Step 19. Click the Save button.

Step 20. When the Leave of Absence comes to an end, it must be entered in CAPPS as well.

Step 21. Click the Workforce Administration button.

Step 22. Click the HR Administration button.

Step 23. Enter the desired information into the Empl ID field. Enter "70641000053".

Step 24. Click the scrollbar.

Step 25. Click the Search button.

Step 26. Click the Activity Guide Navigation Area button.

Step 27. Click the Add a new row at row 1 (Alt+7) button.

Step 28. Click in the Effective Date field.

Step 29. Enter the desired information into the Effective Date field. Enter "05012020".

Step 30. Click the Action list.

Step 31. Click the Return from Leave list item.

Step 32. Click the Look up Reason Code (Alt+5) button.

Step 33. Click the 043 link.

Step 34. Click the scrollbar.

Step 35. Click the Save button.

Step 36. Congratulations! You have completed this lesson.

Entering a Reclassification

Section 4 Exercises, Lesson 11: Entering a Reclassification

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 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 update the employee's reclassified position.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. You will reclassify the position for Jada Train064 from a Director III to Director IV.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000046".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. 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.

Step 10. HR must synchronize the data.

Step 11. Click the Add a new row at row 1 (Alt+7) button.

Step 12. Click in the Effective Date field.

Step 13. The Effective Date for this reclassification must be the same as the effective date used by Position Management when the Job Code was changed. The effective date in Position Management is 5/1/2020.

Step 14. Enter the desired information into the Effective Date field. Enter "05012020".

Step 15. Press [Tab].

Step 16. Notice that the description of the Position has already changed from Director III to IV.

Step 17. The new row you just added contains the updated information in the Position Number field.

Step 18. Click the Action list.

Step 19. Click the Job Reclassification list item.

Step 20. Click the Look up Reason Code (Alt+5) button.

Step 21. Click the 022 link.

Step 22. Click the OK button.

Step 23. Click the Job Information tab.

Step 24. Notice that the current Job Code is 1622. The Position Number will not change, but the Job Code will.

Step 25. Click the Salary Plan tab.

Step 26. Notice also that the current Salary Plan and Grade is B-28.

Step 27. The Grade will change for this position as well.

Step 28. Click the scrollbar.

Step 29. You will use a technique named toggling in order to update the job information for the reclassification.

Step 30. You will clear the Position Number field, enter the same Position Number in the field, and tab out of the field.

Step 31. The job title already changed for the position and now you need the Job Code and related fields to update as well.

Step 32. Clear the Position Number.

Step 33. Click in the Position Number field.

Step 34. Enter the same Position Number in the Position Number field.

Enter the desired information into the Position Number field. Enter "00005577".

Step 35. Press [Tab].

Step 36. Click the Job Information tab.

Step 37. The Job Code has been updated from 1622 to 1623.

Step 38. Click the Salary Plan tab.

Step 39. Salary Plan and Grade have updated as well.

Step 40. Click the Compensation tab.

Step 41. Click the scrollbar.

Step 42. Click the scrollbar.

Step 43. Good news! Jada is getting a raise!

Step 44. Click in the Comp Rate field.

Step 45. Click the (x) to clear the field.

Step 46. Click in the Comp Rate field.

Step 47. Enter the desired information into the Comp Rate field. Enter "7699.16".

Step 48. Click the Calculate Compensation button.

Step 49. Click the Save button.

Step 50. At this point, the Position Data and Job Data for this employee are back in sync, and the reclassification is complete.

Step 51. Sometimes 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.

Step 52. Congratulations! This lesson is complete.

Syncing Job and Position Data

Section 4 Exercises, Lesson 12: Syncing Job and Position Data

Procedure

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

In this lesson, you will learn what must be done by HR to keep both sides of the position in aligned.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. HR will reclass the Director position for Jada Trainchange064 in order to meet the payroll deadline.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000046".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Jada Trainchange064's position has been reclassified, from Director III to IV. We want to get the Job Code changed right away to meet a Payroll deadline.

Step 10. So we've decided to make the changes directly in Job Data rather than waiting for Position Management to initiate the process.

Step 11. Click the Salary Plan tab.

Step 12. Notice that the current Salary Plan and Grade is B-28.

Step 13. Go back to the Work Location tab.

Step 14. Click the scrollbar.

Step 15. Click the Work Location tab.

Step 16. Click the Add a new row at row 1 (Alt+7) button.

Step 17. The change will be effective April 29, 2020. In this scenario, it is the current date.

Step 18. Click the Action list.

Step 19. Click the Job Reclassification list item.

Step 20. Click the Look up Reason Code (Alt+5) button.

Step 21. Click the 022 link.

Step 22. Click the OK button.

Step 23. The Job Code field is normally locked and cannot be edited, so that it stays in sync with Position Management.

Step 24. But an HR SuperUser with the right Security Role can use the Override Position Data button to unlock this field.

Step 25. Click the Override Position Data button.

Step 26. Notice that the label on the button has changed to Use Position Data. We'll leave it that way for now. (That will be important later.)

Step 27. In addition, all the fields are now available for editing.

Step 28. Click the Job Information tab.

Step 29. Click in the Job Code field.

Step 30. Click the (x) to clear the field.

Step 31. Click in the Job Code field.

Step 32. Enter the desired information into the Job Code field. Enter "1623".

Step 33. Press [Tab].

Step 34. The Job Code Description updated right away.

Step 35. Click the Salary Plan tab.

Step 36. The Salary Grade has been updated.

Step 37. Click the Compensation tab.

Step 38. Click the scrollbar.

Step 39. Click the scrollbar.

Step 40. A raise comes along with the reclassification (which is why we wanted to beat the Payroll deadline).

Step 41. Click in the Comp Rate field.

Step 42. Click the (x) to clear the field.

Step 43. Click in the Comp Rate field.

Step 44. Enter the desired information into the Comp Rate field. Enter "7699.16".

Step 45. Click the Calculate Compensation button.

Step 46. Click the Save button.

Step 47. The CAPPS system will automatically send a notification to Position Management alerting them of the changes that you just made. They will correct Position Data on their side.

Step 48. Once they have updated the Position Data, they will contact you so that you can perform the final step in the process.

Step 49. Click the Workforce Administration button.

Step 50. Position Management has informed you that they have updated the position on their end.

Step 51. Now you will perform one final step in order for HR to be in sync with Position Management.

Step 52. Click the HR Administration button.

Step 53. Enter the Empl ID for Jada Trainchange064.

Step 54. Enter the desired information into the Empl ID field. Enter "70641000046".

Step 55. Click the scrollbar.

Step 56. Click the Search button.

Step 57. Click the Activity Guide Navigation Area button.

Step 58. 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.

Step 59. 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.

Step 60. But the button is currently disabled and can't be clicked.

Step 61. To complete this transaction, we need to go into Corrections mode, and reset that button, on the same Effective Dated row as before.

Step 62. Click the scrollbar.

Step 63. Click the Correct History button.

Step 64. The Use Position Data button is now available.

Step 65. Click the Use Position Data button.

Step 66. Click the scrollbar.

Step 67. Click the Save button.

Step 68. Your update has been saved, and your Position and Job Data are back in sync.

Step 69. Congratulations! You have completed this lesson.

Entering a Merit Increase

Section 4 Exercises, Lesson 13: Entering a Merit Increase

Procedure

CAPPS allows you to make retroactive and future-dated transactions.

In this lesson, you will learn how to enter a Merit Increase using a past date.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. Jenny Train064 has done a great job and deserves a Merit increase.

Step 5. Enter the desired information into the Empl ID field. Enter "70641000055".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Add a new row at row 1 (Alt+7) button.

Step 10. The effective date for this demotion is March 1, 2020.

Step 11. Click in the Effective Date field.

Step 12. Enter the desired information into the Effective Date field. Enter "03012020".

Step 13. Click the Action list.

Step 14. Click the Pay Rate Change list item.

Step 15. Click the Look up Reason Code (Alt+5) button.

Step 16. Click the 025 link.

Step 17. Click the OK button.

Step 18. Click the Compensation tab.

Step 19. Click the scrollbar.

Step 20. Click the scrollbar.

Step 21. Click the Changes button.

Step 22. Changes to the Compensation Rate can be made by entering a dollar amount or by entering a percentage.

Step 23. If you want to enter a flat dollar amount, you would use the Comp Rate field.

Step 24. This employee is going to receive a 5% raise.

Step 25. Click in the Change Percent field.

Step 26. Enter the desired information into the Change Percent field. Enter "5".

Step 27. Click the Calculate Compensation button.

Step 28. The monthly change to the employee's salary will be $465.80.

Step 29. Click the Save button.

Step 30. This message window appears to remind you about important agency policies regarding merit increases.

Step 31. Click the OK button.

Step 32. This retroactive Merit Increase has now been entered and will be reflected in the employee's next paycheck.

Step 33. Congratulations! You have completed this lesson.

Entering an Equity Adjustment

Section 4 Exercises, Lesson 14: Entering Equity Adjustments

Procedure

In this lesson, you will learn how to enter an Equity Adjustment.

Step 1. Click the Employee Self Service button.

Step 2. Click the Workforce Administration menu.

Step 3. Click the HR Administration button.

Step 4. Francie Train064 will be receiving an equity adjustment

Step 5. Enter the desired information into the Empl ID field. Enter "70641000056".

Step 6. Click the scrollbar.

Step 7. Click the Search button.

Step 8. Click the Activity Guide Navigation Area button.

Step 9. Click the Add a new row at row 1 (Alt+7) button.

Step 10. The effective date for the Equity Adjustment will be next month, 5/1/2020.

Step 11. Click in the Effective Date field.

Step 12. Enter the desired information into the Effective Date field. Enter "05012020".

Step 13. Click the Action list.

Step 14. Click the Pay Rate Change list item.

Step 15. Click the Look up Reason Code (Alt+5) button.

Step 16. Click the 040 link.

Step 17. Click the OK button.

Step 18. Click the Compensation tab.

Step 19. Click the scrollbar.

Step 20. Click the scrollbar.

Step 21. Francie's new rate will be $2300.

Step 22. Click in the Comp Rate field.

Step 23. Click the (x) to clear the field.

Step 24. Click in the Comp Rate field.

Step 25. Enter the desired information into the Comp Rate field. Enter "2300".

Step 26. Click the Calculate Compensation button.

Step 27. Click the Save button.

Step 28. Congratulations! You have completed this lesson.

Step 29. End of Procedure.

Section 5: HR Queries & Reports

Section 5: HR Queries & Reports

Running a Query

Section 5 Exercises, Lesson 1: Running a Query

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.

In this lesson, you will learn how to run an HR query.

Step 1. Queries are located within Reporting Tools.

Step 2. Click the NavBar button.

Step 3.	Click the Navigator button.
Step 4.	Click the scrollbar.
Step 5.	Click the Reporting Tools menu.
Step 6.	Click the Query menu.
Step 7.	Click the Query Viewer menu.
Step 8.	There a variety of queries that were created for agencies. Queries for HR begin with the prefix (TX_HR)
Step 9.	Enter the desired information into the begins with field. Enter "tx_hr".
Step 10.	Click the Search button.
Step 11.	All the HR queries that you have access to are displayed and ready to be run.
Step 12.	You will run the TX_HR_AGY_ACTV_EMPL query.
Step 13.	This query can be run in HTML or Excel. XML is not being used. The results will display on your screen and/or Run to Excel for downloading.
Step 14.	Click the HTML link.
Step 15.	Enter the desired information into the Enter Agency Number field. Enter "064".
Step 16.	You can enter a Business Unit as well but skip this field in training.
Step 17.	Click the View Results button.
Step 18.	You have the option to download to Excel and edit this query.
Step 19.	You may want to delete columns that you don't need or possibly sort in a particular order.
Step 20.	Click the Excel Spreadsheet link.
Step 21.	Click the Open button.
Step 22.	The query results opened in a new window.
Step 23.	Click the Close button.
Step 24.	Click the Close Tab (Ctrl+W) button.
Step 25.	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.
Step 26.	Click the scrollbar.

Step 27. Click the Favorite link.

Step 28. The Favorite query will appear at the bottom of the page. However when you navigate back to Query later, it will appear in your Favorites list near the top.

Step 29. Let's walk through that.

Step 30. Click the Home button.

Step 31. Click the NavBar button.

Step 32. Click the Navigator button.

Step 33. Click the Query Viewer menu.

Step 34. Your Favorite Queries list contains the query that you just saved.

Step 35. Congratulations! You have completed this lesson.

Step 36. End of Procedure

Running an HR Report

Section 5 Exercises, Lesson 2: Running an HR Report

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, you will learn how to run the New Hires and Transfers report.

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 1. Click the Reports button.

Step 2. Click the New Hire and Transfers link.

Step 3. If you've run this report before, then you would use the Find Existing Value tab.

Step 4. Click the Add a New Value tab.

Step 5. 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.

Step 6. This Run Control ID only used by you. No one else can see it.

Step 7. The Run Control ID can be up to 30 characters, no spaces, no special characters except for an underscore.

Step 8. Give your Run Control a name that will identify this report for future reference.

Step 9. Enter the desired information into the Run Control ID field. Enter "newhirestrans".

Step 10. Click the Add button.

Step 11. Click the Activity Guide Navigation Area button.

Step 12. Note: There is an asterisk noting the required fields.

Step 13. Now set up the parameters for this Run Control.

Step 14. The first parameter is the Agency.

Step 15. Click in the Company field.

Step 16. Enter the desired information into the Company field. Enter "064".

Step 17. You want to review all hires/transfers from 9/1/2019 - 5/4/2020.

Step 18. Click in the Start Date field.

Step 19. Enter the desired information into the Start Date field. Enter "09012019".

Step 20. Click in the End Date field.

Step 21. Enter the desired information into the End Date field. Enter "05012020".

Step 22. Click the Run button.

Step 23. A report may contain more than one process. This particular report only contains one.

Step 24. Click the OK button.

Step 25. Reports run in the background, so that you can continue working while they run. Everyone within the system running reports and processes are put into a queue, and run according to the priority of the request and the capacity of the processors.

Step 26. Generally, this happens pretty quickly, but sometimes you may need to be patient.

Step 27. Click the Process Monitor link.

Step 28. 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.

Step 29. The most recent requests are on top.

Step 30. Click the scrollbar.

Step 31. The current Run Status is Queued and Distribution is N/A.

Step 32. After waiting a few seconds or minutes, update the screen by clicking the Refresh button.

Step 33. Click the Refresh button.

Step 34. Ok, now it's done! Let's take a look at the results.

Step 35. Click the Details link.

Step 36. The Process Detail screen shows information about the process that just completed.

Step 37. The report we're looking for is part of the Log.

Step 38. Click the View Log/Trace link.

Step 39. The default file format is .pdf, so find the file name that ends with that extension, and click on it.

Step 40. Click the TX_NEW_HIRES.pdf link.

Step 41. This is what the New Hires and Transfers Report looks like for your training agency.

Step 42. There is 1 of 1 page for this report.

Step 43. Click the Close Tab (Ctrl+W) button.

Step 44. Click the Close button.

Step 45. Click the OK button.

Step 46. Congratulations! You have completed this lesson.