

A banner with a blue and white abstract background featuring glowing circles and lines. The text is centered and reads:

CAPPS HR/PAYROLL
End-User Training (EUT)

EUT Course - 99
FUNDAMENTALS

PeopleSoft 9.2
March, 2016

Table of Contents

99 Fundamentals	1
Section 1. Introduction	1
Introduction to CAPPS HR/Payroll.....	1
Signing In to the System	3
Forgotten Password, Password Reset.....	7
Section 2. Navigation Overview	11
Universal Navigation Elements.....	11
Using Personal Preferences.....	26
Section 3. Using Keys and Search Pages	28
Understanding Keys	28
Understanding Search Pages	33
Using Operators and Wildcards	43
Section 4. Working with Pages.....	49
Recognizing Page Controls.....	49
Using CAPPS Grids	55
Using the Find Feature of Your Browser	62
Section 5. Adding and Updating Data.....	64
Understanding Action Types.....	65
Categories of Effective-Dated Rows.....	72
Adding a New High-Level Key	81
Using Update/Display	88
Using Include History	90
Using Correct History	94
Glossary	99

Fundamentals

This course (99 Fundamentals) covers basic **CAPPS HR/Payroll** navigation and system functionality. It is intended for all CAPPS HR/Payroll users, and is a pre-requisite for other CAPPS HR/Payroll application classes.

The CAPPS (Centralized Accounting and Payroll/Personnel System) HR/Payroll system is a PeopleSoft Enterprise Human Capital Management 9.2 system. This course includes an introduction to CAPPS, an overview of page navigation, a discussion on how to use keys and search pages, a discussion on working with pages, and an overview on how to add and update data. CAPPS HR/Payroll applications use a browser-based interface to view or manipulate data.

Upon completion of this course, you will be able to:

- Describe basic navigation elements used in CAPPS HR/Payroll applications.
- Describe key fields and use search pages.
- Work with pages.
- Add and update data.

Section 1. Introduction

Section 1 - Introduction

This section provides an introduction to ProjectONE and CAPPS HR/Payroll, shows how to sign in to the system, and discusses how to reset a password.

Introduction to CAPPS HR/Payroll

Section 1 - Exercises - Lesson 1: Introduction to CAPPS HR/Payroll

This lesson provides a brief overview of ProjectONE, CAPPS HR/Payroll, and legacy systems that will be replaced.

It shows integration points between old and new systems, and gives examples of typical kinds of transactions in the CAPPS HR/Payroll system.

Procedure

This lesson introduces CAPPS HR/Payroll.

CAPPS HR/PAYROLL

EUT Course



Step	Action
1.	<p>A brief overview of ProjectONE.</p> <p>ProjectONE is the name of the project that will:</p> <ul style="list-style-type: none">- Implement CAPPS for deploying agencies- Replace disparate computer systems with ONE centralized system- Provide ONE set of books for the state. <p>ONE stands for Our New Enterprise.</p>
2.	<p>A brief overview of CAPPS (Centralized Accounting and Payroll/Personnel System).</p> <ul style="list-style-type: none">- CAPPS includes both Financial and HR/Payroll modules (or applications).- It is more cost effective over time than current agency and statewide systems.- CAPPS will improve accuracy and functionality.
3.	<p>Statewide Systems Integration.</p> <p>Several systems will pass information back and forth with CAPPS.</p> <p>This includes: USAS, SPRS, SPA, TINS, USPS, and TX SmartBuy systems.</p>
4.	<p>CAPPS HR/Payroll integrates with:</p> <ul style="list-style-type: none">- CAPPS Financials (for accounting)- ERS (for Leave Balances and Terminations)- TINS (for payments)- SPRS and ERS (Financial Data)- USAS and Treasury
5.	<p>Core Modules include: Position Management, Time & Labor, Payroll, Human Resources, and Benefits.</p> <p>Future Modules include Recruiting Solutions, Learning Management, and Performance Management.</p>
6.	<p>An integrated system makes time reporting easy.</p> <p>Time entries come from both Timesheet Entries and Scheduled Time, and will update a CAPPS database table. After processing the Reported Time Table, the Time entries are ready to integrate with Payroll.</p>

Step	Action
7.	<p>An Integrated System Simplifies Data Entry</p> <p>Integration allows Payroll to use data stored in both the HR module and the Time & Labor module to automatically build pay sheets, and accurately calculate employee payments. These payments will comply with statutory and CPA payroll policy requirements.</p> <p>This eliminates the need to enter duplicate information into two systems.</p>
8.	<p>Congratulations! You have successfully completed the Introduction to CAPPS HR/Payroll lesson.</p> <p>End of Procedure.</p>

Signing In to the System

Procedure

This lesson shows you how to log into the CAPPS Enterprise Portal and the CAPPS HR/Payroll system. It also shows you your menu options and choices.

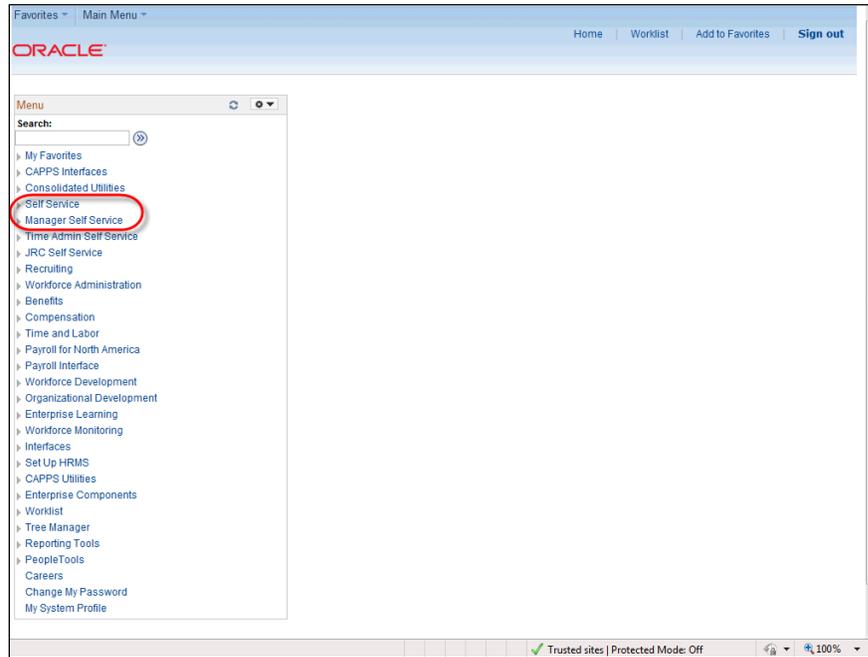
Step	Action
1.	<p>This Login page is the gateway to the CAPPS Enterprise Portal and the CAPPS HR/Payroll system as well as other CAPPS PeopleSoft applications.</p> <p>It is recommended that you save this URL as a Favorite in your Internet browser.</p>
2.	<p>The Login page is where you will enter your User ID and Secure Password in the appropriate fields.</p> <p>If you do not have this information, please contact your agency password support personnel.</p> <p>The Secure Password is Case Sensitive. As you enter your password, the system will mask your entry with asterisks.</p>
3.	<p>Once you have entered the User ID and Secure Password you will click the Sign In button.</p>
4.	<p>This page contains the CAPPS Enterprise Portal. The views on the Portal will vary according to individual security roles.</p> <p>Next you will take a look at each of the components within the Enterprise Portal.</p>

CAPPS HR/PAYROLL

EUT Course



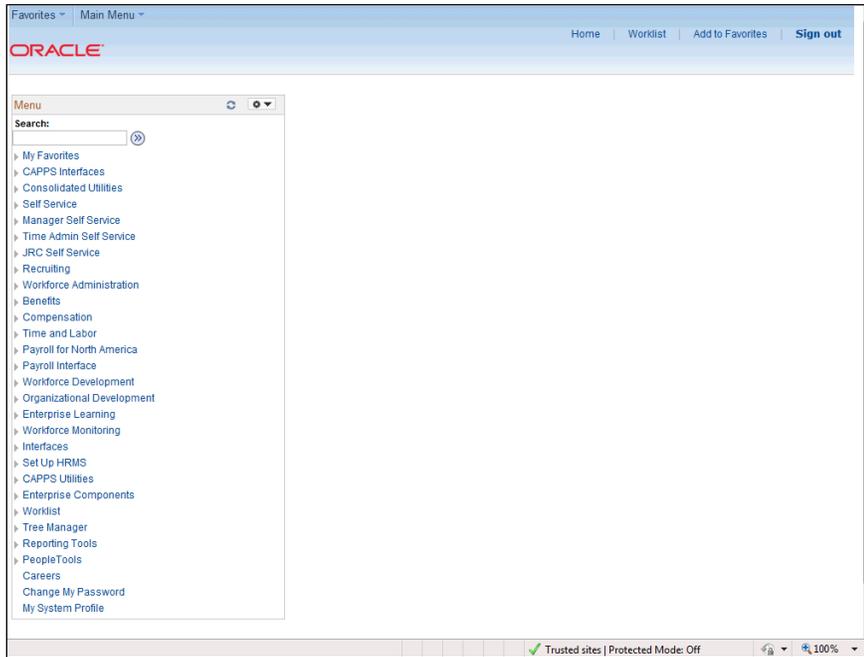
Step	Action
5.	<p>This is the CAPPS HR/Payroll Application Link. This link takes you to the PeopleSoft Menu with choices and options based on (1) your role in the system and (2) your security access to the system.</p> <p>If you are a user with access to both HR/Payroll and Finance applications then you will also see a FIN Application Link further down the page.</p>
6.	<p>Below the HR/Payroll application link are the Employee Self-Service and Manager Self-Service links.</p> <p>The Self-Service options are available to all employees.</p>
7.	<p>The Manager Self-Service links are available to any employee with a role as a Manager in the system.</p> <p>Remember the application links will appear according to the user profile.</p>
8.	<p>The Worklist will only appear for users that have Worklist items.</p> <p>In this example, the user has an HR/Payroll Worklist.</p>
9.	<p>Common Links are static and will appear for everyone.</p> <p>Notice the link to Change Password.</p>
10.	<p>Other Portal Links are for users specifically granted access to UAT, Maintenance, and Sandbox.</p>
11.	<p>New Content Pagelets appear in this area by suite (HR/Payroll and/or FIN).</p> <p>They will contain information about downtime, scheduled maintenance, and timely reminders.</p>
12.	<p>Next you will see how the Main Menu can be used as an alternate way to access the same information.</p>
13.	<p>The CAPPS HR Portal also displays a Main Menu with choices and options based on your role and security in the system.</p> <p>This is an alternate way to navigate to information in the system.</p>
14.	<p>You can access Employee Self-Service from here as well.</p>
15.	<p>After selecting the HR/Payroll link, you will see the CAPPS HR/Payroll Menu options.</p>



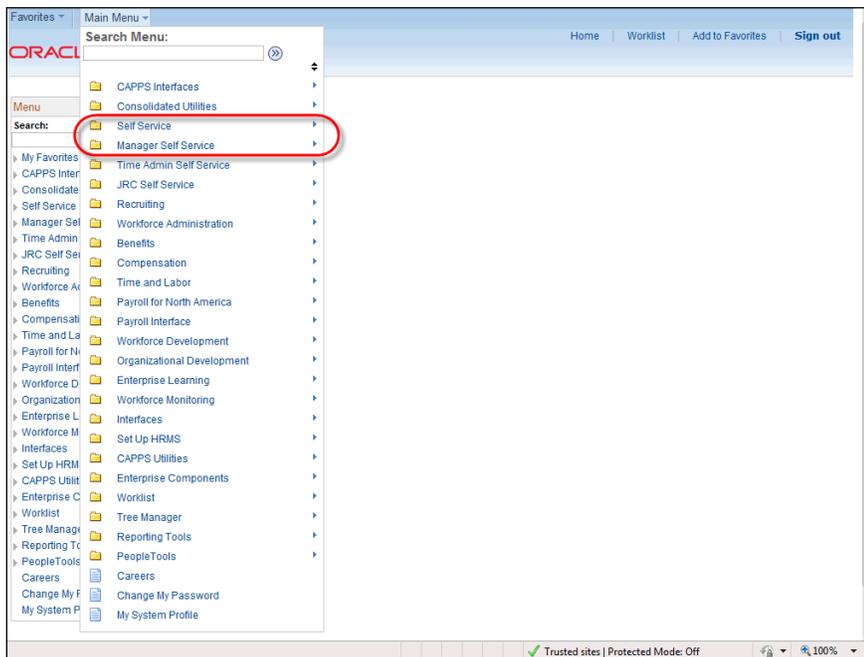
Step	Action
16.	<p>The system now displays the CAPPS HR/Payroll Application Main Menu.</p> <p>Please note that in addition to accessing ESS or MSS from the portal (the previous screen shots), you can also navigate to (Employee) Self Service or Manager Self Service from this Menu.</p>

CAPPS HR/PAYROLL

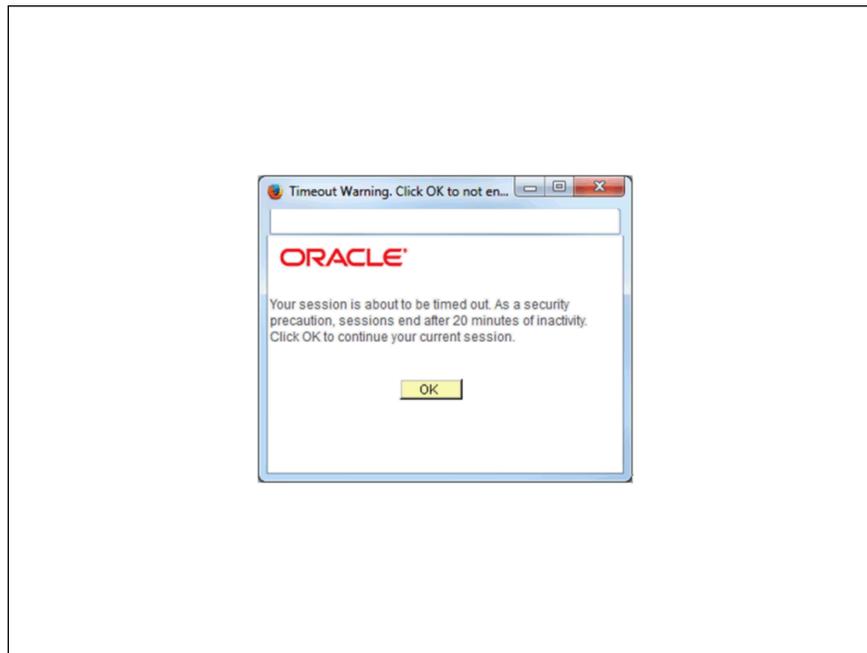
EUT Course



Step	Action
17.	Click the Main Menu button to see the same list of menu options and choices. <div style="border: 1px solid red; padding: 2px; display: inline-block;">Main Menu</div>



Step	Action
18.	<p>Note that you can go to (Employee) Self Service or Manager Self Service from this Main Menu list as well.</p> <p>Most employees will see a limited number of choices when they login to the CAPPS HR/Payroll system.</p>



Step	Action
19.	<p>Because of security requirements, CAPPS logs you out of your application after a period of inactivity.</p> <p>A few minutes prior to timing out, the system provides a popup warning telling you that your browser session is about to end.</p> <p>If you click OK, though, the timer is reset, and your current session continues.</p>
20.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Forgotten Password, Password Reset Procedure

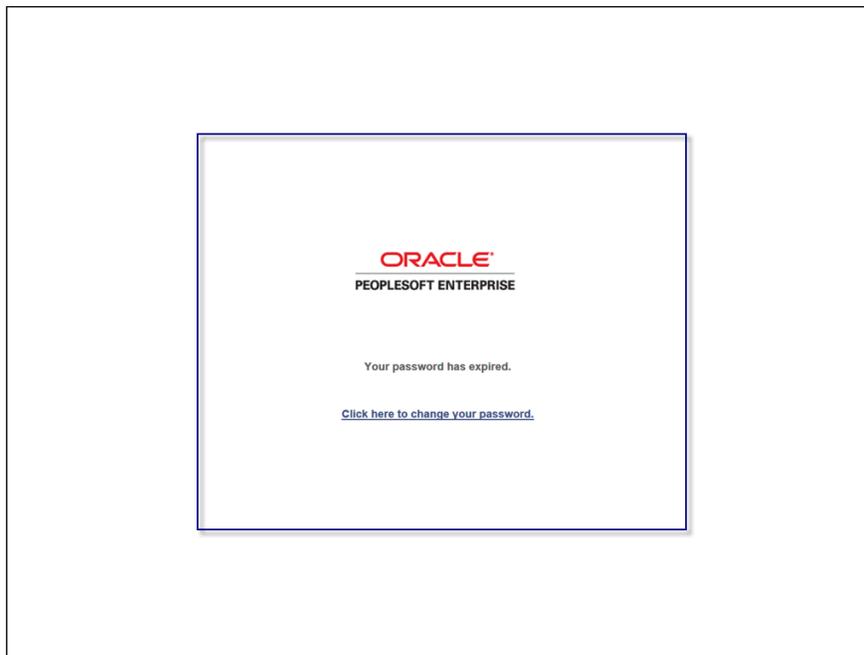
CAPPS HR/PAYROLL

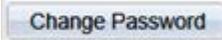
EUT Course



This lesson shows you how to reset a forgotten password, how to change a password, and how to set up a Password Hint.

Step	Action
1.	CAPPS HR/Payroll Password Reset If you have forgotten your password, contact your agency password support personnel. You will be sent a temporary password.
2.	You will receive a temporary password in an email.
3.	Enter your User ID and temporary Password to start the process of changing your password. In this example, you have entered your User ID and Secure Password already.



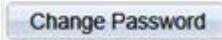
Step	Action
4.	<p>The system tells you that your temporary password has expired.</p> <p>Click on the link to change your password.</p> <p>Click the Change Password link.</p> <p>Click here to change your password.</p>
5.	<p>Enter the temporary password (the one you received in an email) in the *Current Password field.</p> <p>Enter a *New Password, and enter it again in the *Confirm Password field.</p> <p>Click the Change Password link.</p> 
6.	<p>The system confirms that your password has been changed.</p>
7.	<p>How to Set Up Password Hints</p> <p>In CAPPS HR/Payroll you can set up a password hint so that you can reset your own password.</p> <p>On the Portal page, you would select the Maintain Password Hint link under the Common Links section.</p>
8.	<p>The system asks you to select a question from the drop down list.</p> <p>In this example, your question will be <i>"What was the name of your first pet?"</i> You may use the drop down arrow to select a different question. The Response must be at least 5 characters long.</p> <p>After selecting your question, entering your response information, you will click the Save button.</p>
9.	<p>Manual Password Reset</p> <p>You can also manually reset your own password. This method assumes that you are already logged into the CAPPS Enterprise Portal.</p> <p>You would click the Change Password link near the bottom under Common Links.</p>

CAPPS HR/PAYROLL

EUT Course



Step	Action
10.	<p>Enter your current password in the *Current Password field.</p> <p>Enter a *New Password, and enter it again in the *Confirm Password field.</p> <p>Click the Change Password link.</p> 
11.	<p>The system confirms that your password has been changed.</p>
12.	<p>How to use "I forgot/Change my password."</p> <p>If you have forgotten your password and you have set up a password hint, you can have a temporary password sent to you in an email. The system uses the email address stored in your User ID account.</p> <p>NOTE: You may have an email address on file in the system, but the system will only use a specific email address from the email field labeled "Business" in your User ID profile. If you do not receive the temporary password email, contact your agency password support personnel.</p>
13.	<p>To begin, click the I forgot/Change my password link on the CAPPS login page.</p>
14.	<p>Enter your User ID, and then click on the Continue button.</p>
15.	<p>The system asks you for the Response to your Password Hint that you previously set up.</p> <p>You then click on the Email New Password button.</p>
16.	<p>If your Response is valid, the system will email you (to the email address on file) a temporary password.</p> <p>NOTE: You may have an email address on file in the system, but the system will only use a specific email address from the email field labeled "Business" in your User ID profile. If you do not receive the temporary password email, contact your agency password support personnel.</p>
17.	<p>The system sends you an email.</p>
18.	<p>Enter your User ID and temporary Password to start the process of changing your password.</p> <p>In this example, we have entered your User ID and Secure Password already.</p>

Step	Action
19.	<p>The system tells you that your temporary password has expired.</p> <p>Click on the link to change your password.</p> <p>Click the Change Password link.</p> <p>Click here to change your password.</p>
20.	<p>Enter the temporary password (the one you received in the email) in the *Current Password field.</p> <p>Enter a *New Password, and enter it again in the *Confirm Password field.</p> <p>Click the Change Password link.</p> 
21.	The system confirms that your password has been changed.
22.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Section 2. Navigation Overview

Section 2 - Navigation Overview

After completing this section, you will be able to:

- Recognize universal navigation elements
- Use Personal Preference

Universal Navigation Elements

Section 2 - Exercises - Lesson 1: Universal Navigation Elements

This lesson discusses some of the basic **navigation elements** common to all CAPPS HR/Payroll applications. Some navigation elements may or may not be available based on your security settings and application implementation.

The elements discussed in this lesson include:

- Home page
- Universal navigation header items
- Favorites menu
- Cascading menus (Main Menu)

CAPPS HR/PAYROLL

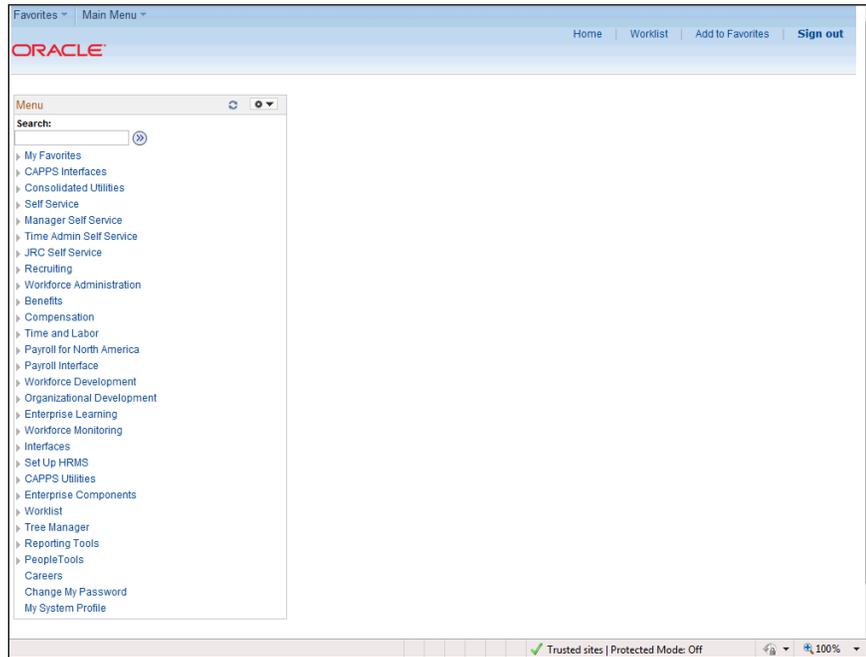
EUT Course



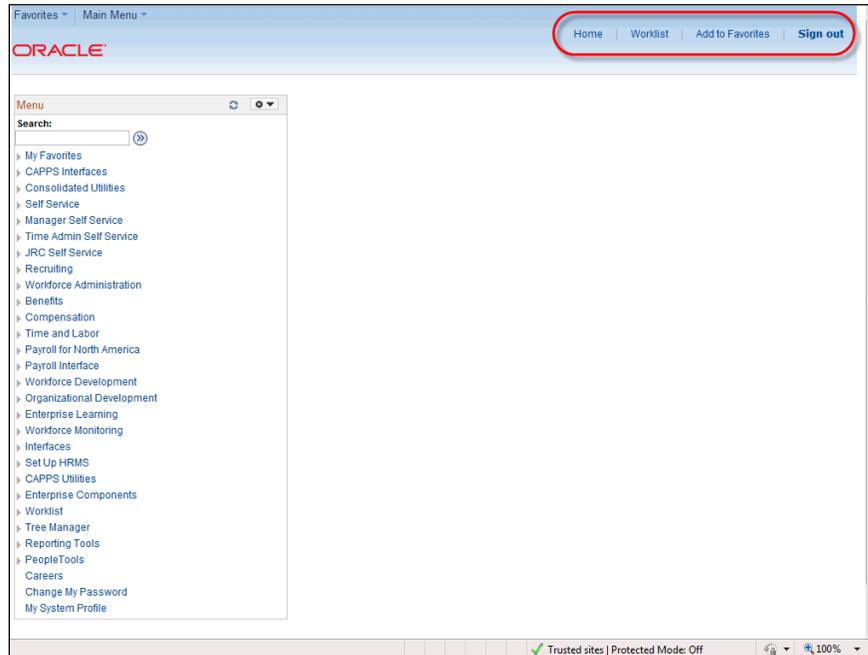
- General navigation elements within a component (tabs, links)

Procedure

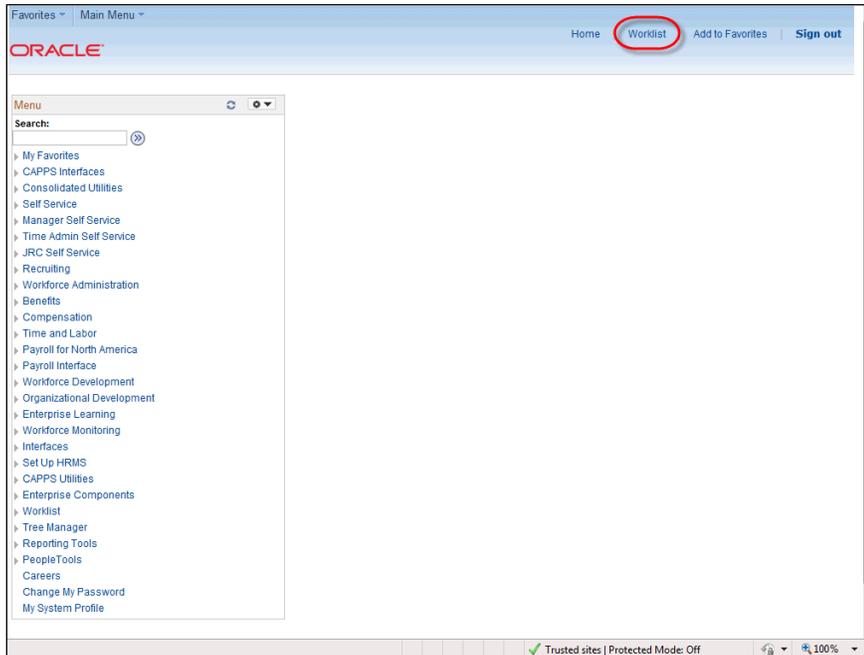
This lesson highlights some common navigation elements in the CAPPS HR/Payroll application.



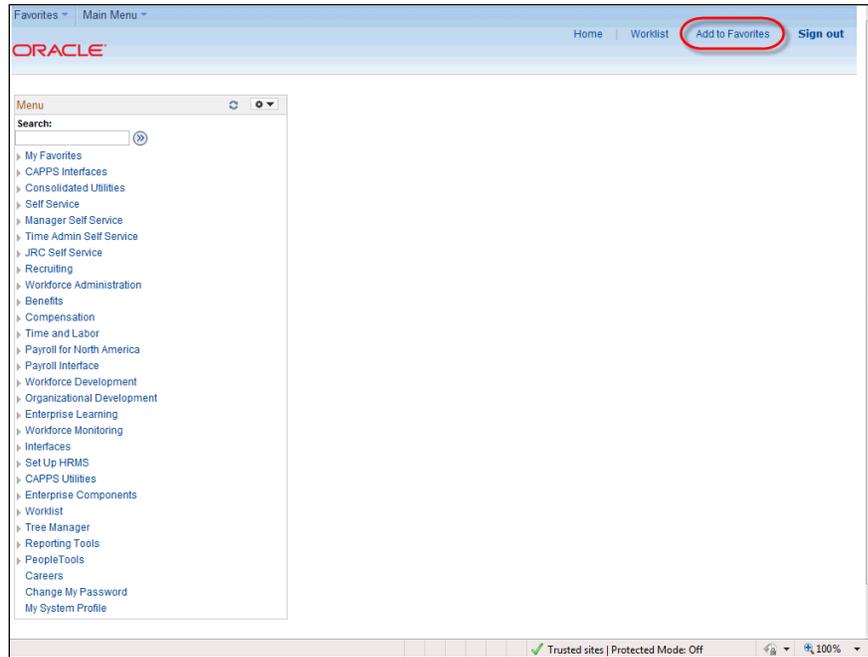
Step	Action
1.	The CAPPS HR/Payroll browser-based interface contains navigation elements that are the same as those found in other CAPPS applications. After you sign in to CAPPS, your Home page appears.



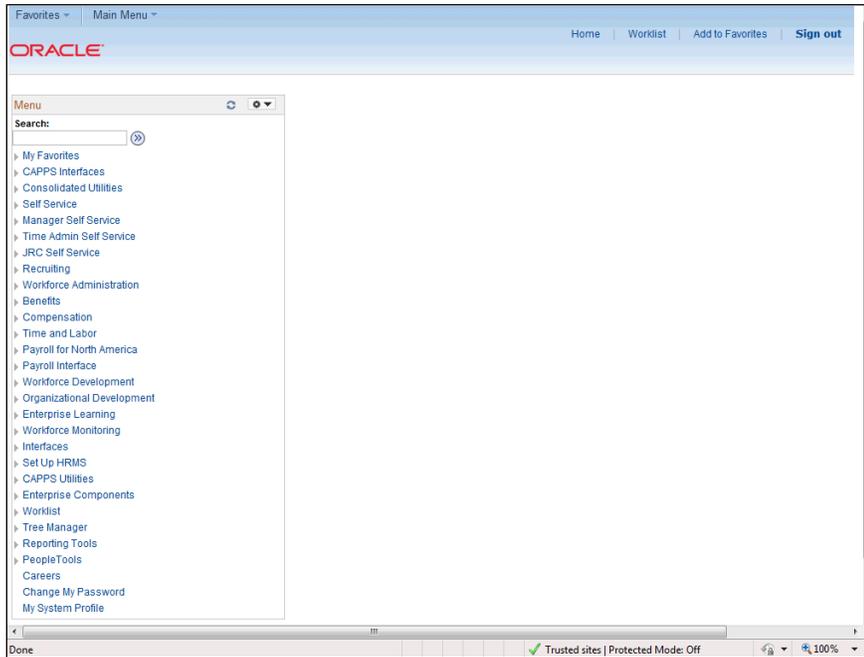
Step	Action
2.	<p>The system usually displays a universal navigation header at the top of every page. This header might contain the following links:</p> <ul style="list-style-type: none"> • Home • Worklist • Add to Favorites • Sign out <p>Some links might not be available to a user; the presence or absence of a link is based on user security settings, as well as application implementation rules.</p>



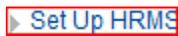
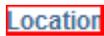
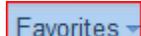
Step	Action
3.	<p>The Worklist link tells the system to go to your worklist page.</p> <p>A worklist is an organized list of items waiting for your attention. The system automatically generates your worklist when you use a workflow-enabled application.</p> <p>The Worklist page provides summary information about all items on your personal worklist.</p> <p>The Worklist page also provides links for you to view additional details about an item, navigate to a page where you can perform an action (such as Approve) on an item, and (optionally) reassign a work item to someone else.</p>
4.	<p>If you are involved in approving items, those approvals will be worked from the Worklist.</p>



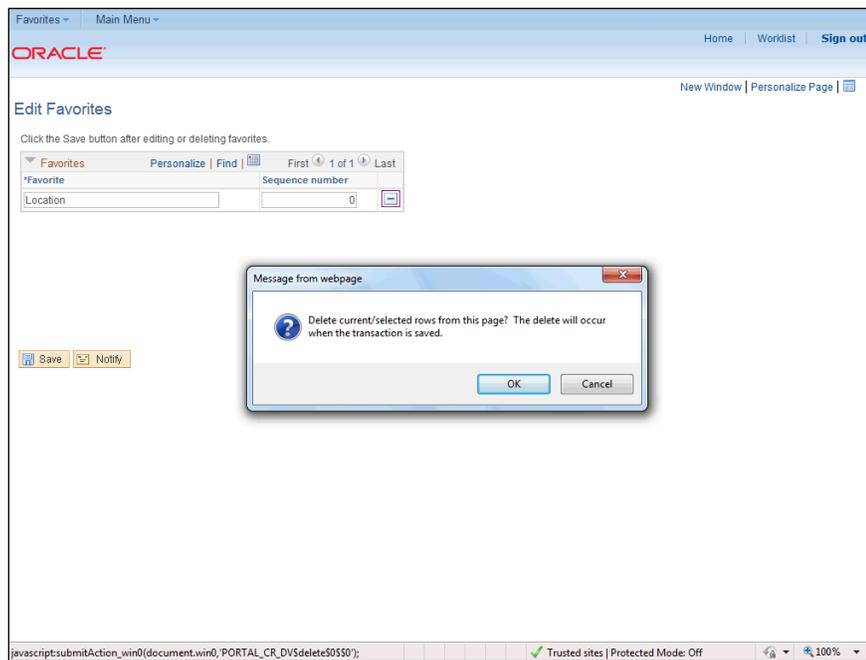
Step	Action
5.	<p>Add to Favorites is a feature similar to a browser bookmark; use it for frequently used folders and content pages.</p> <p>Use Add to Favorites to add the current page to your list of favorites; Favorites can be accessed from the Favorites menu in the upper right corner of this page.</p>



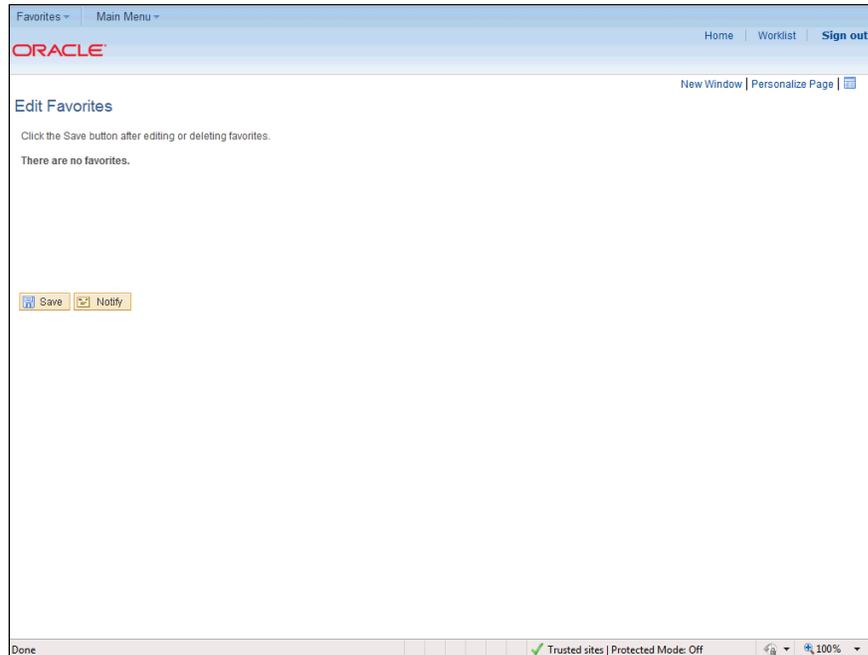
Step	Action
6.	<p>The Favorites menu grants quick access to frequently used pages that you have added to My Favorites; the system also maintains a list of Recently Used pages in this location.</p> <p>Clicking a link from the Favorites menu is a direct path to the page, and will bypass menu navigation.</p> <p>Click the Favorites button.</p> 
7.	<p>The Favorites menu has two sections. The top section will list Recently Used pages. This example shows that you recently accessed the Location page.</p> <p>You can go directly to the Location page without menu navigation. This can save time because you don't have to remember where a page is located in the menu structure.</p> <p>Click the Location menu item.</p> 
8.	<p>The system takes you directly to the Location page.</p> <p>You did not use the menu structure to get to this page, but the system still leaves "breadcrumbs" across the top of the page.</p>

Step	Action
9.	Click the Home link to return to the Home page. 
10.	In the next example, you will see how to add the Location page to the Favorites menu in the My Favorites section. Navigate to the Location page by clicking the Set Up HRMS link. 
11.	Click the Foundation Tables link. 
12.	Click the Organization link. 
13.	Click the Location link. 
14.	The system opens the Location search page. Click the Add to Favorites link. 
15.	Either accept the default Description , or enter your own description for this page. In this example, accept the default description of Location . Click the OK button. 
16.	The system displays a message telling you that the favorite has been saved. Click the OK button. 
17.	Click the Favorites button to see if Location was added to your list of favorites. 
18.	Location has been added to the My Favorites section of the Favorites menu.
19.	You can optionally change the name of a Favorite. You can also delete it from this list. Click the Edit Favorites menu item. 

Step	Action
20.	To edit the name of a Favorite, simply replace the entry 'Location' with one of your own choosing, and then hit the Save button.
21.	To delete a favorite, click the minus sign (-) next to the favorite to be deleted. Click the Delete row 1 button. 



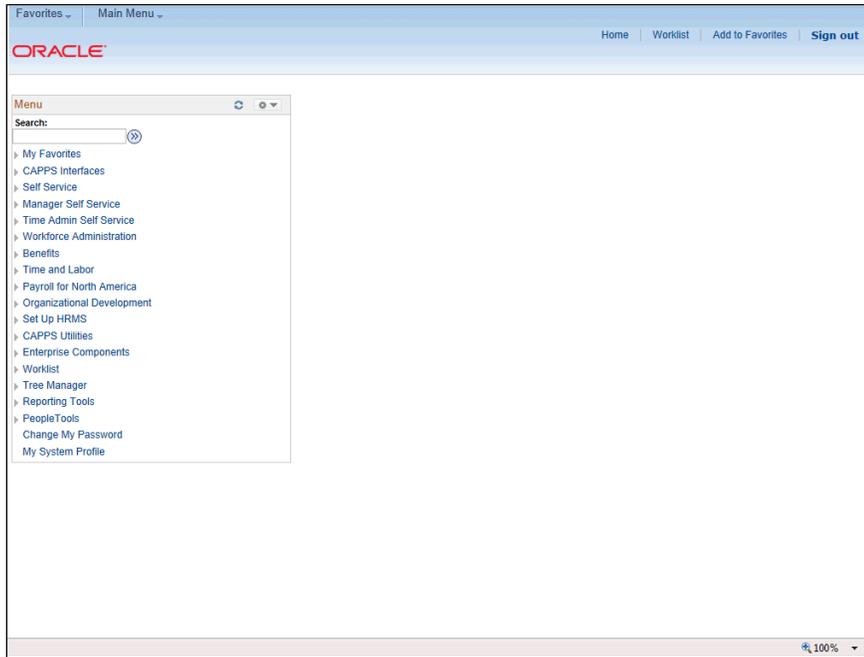
Step	Action
22.	The system asks you to confirm your deletion. You have the option, of course, to cancel this deletion. Confirm deletion by clicking the OK button. 



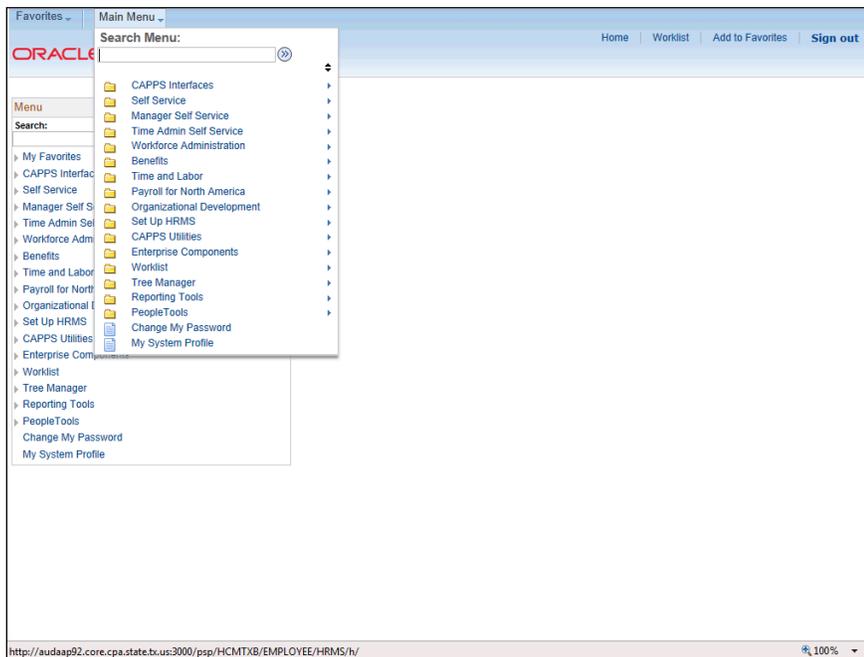
Step	Action
23.	<p>Save your work. This tells the system to "complete" the transaction.</p> <p>Click the Save button.</p> 
24.	<p>You will see that Location was removed from the My Favorites list.</p> <p>Click the Favorites button.</p> 
25.	<p>Location is no longer listed under My Favorites.</p> <p>(Note that Location still appears on the Recently Used list; that's because the system maintains the Recently Used section of the Favorites menu.)</p>

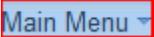
CAPPS HR/PAYROLL

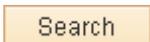
EUT Course



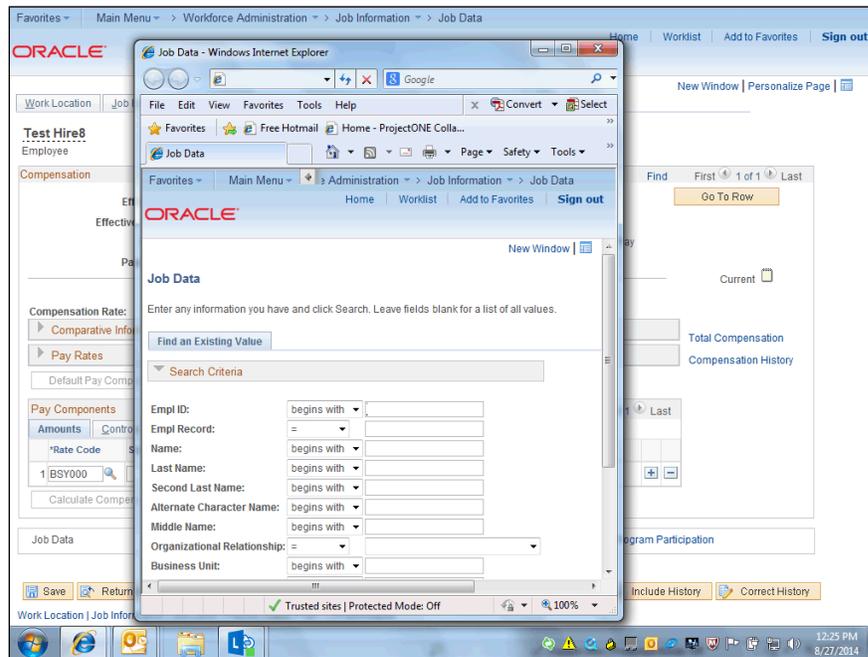
Step	Action
26.	Click the Main Menu button. 



Step	Action
27.	<p>You may have noticed that the sort order for the Menu structure is not alphabetical. If you want to sort your menu alphabetically, there is a setting on this screen that you can change.</p> <p>Click the Sort Menu button.</p> 
28.	<p>Now the menu is sorted from A to Z.</p> <p>If you click the icon again, it reverses the sort.</p> <p>Click the Sort Menu button.</p> 
29.	<p>You can see that the menu is now sorted from Z to A.</p> <p>Click the icon again to restore the menu to its original order.</p> <p>Click the Sort Menu button.</p> 
30.	<p>When you are through using the system, click the Sign out link to sign out of the application.</p> <p>The system will log you out, and return you to the Sign In page.</p>
31.	<p>Now we will learn how to navigate to components and pages. In this example, we will navigate to the Job Data component.</p> <p>Click the Main Menu button.</p> 
32.	<p>Click the Workforce Administration menu.</p> 
33.	<p>Click the Job Information menu.</p> 

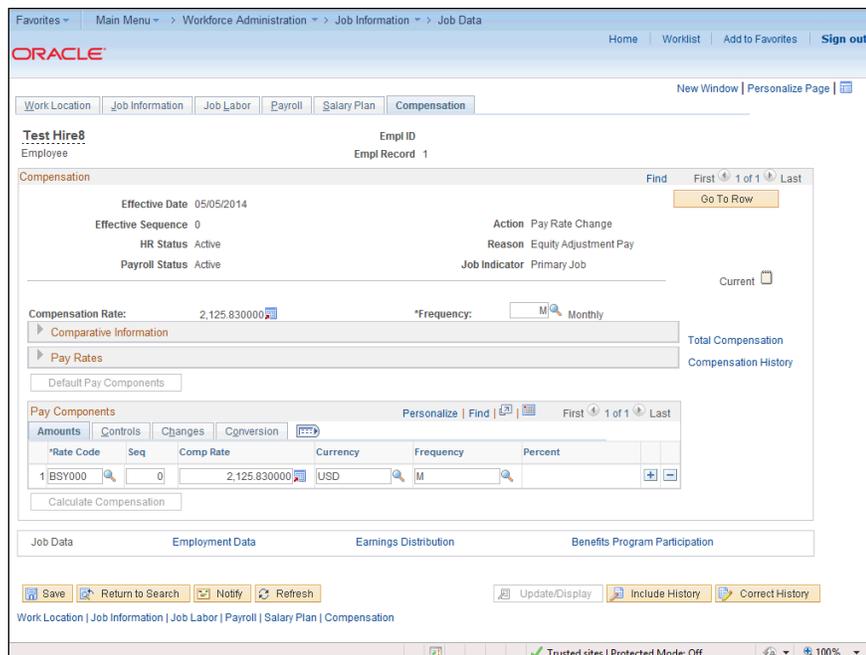
Step	Action
34.	<p>CAPPS uses cascading menus to display menu choices.</p> <p>The menu structure is composed of hierarchical folders (or submenus) as well as component (or page) references to navigate to a specific application page.</p> <p>Folders are yellow, and look like a tabbed manila folder. A folder will always generate more choices.</p> <p>A component (or page) reference is blue, and looks like a sheet of paper.</p> <p>Click the Job Data link.</p> 
35.	<p>On a Search Criteria page you can enter a value in any of the fields.</p>
36.	<p>Click the Search button.</p> 
37.	<p>The system displays the Job Data component.</p> <p>Notice how there are several tabs across the top.</p>
38.	<p>A Component has several pages (tabs) in the same window. These pages are related, and sometimes need to be completed in order.</p> <p>In this example of the Job Data component, the tabs are Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation.</p> <p>Click the Compensation tab.</p> 
39.	<p>In this window, the tabs near the top of the page are also links at the bottom of the page.</p> <p>Other examples of component links might include links for Go to or More (not displayed here).</p>
40.	<p>Below the universal navigation header sits the pagebar, a series of links and buttons, such as New Window, Personalize Page, etc.</p> <p>Depending on security settings or application implementation rules, not all options may be available on a particular page.</p>

Step	Action
41.	<p>Use the New Window link to open a new browser window (or depending on your browser settings, a new tab). The new window (tab) is known as a child window.</p> <p>The child window typically replicates the same page from which you clicked New Window (in other words, in the same place in the system). From this new window, you can view or enter data. You can also navigate to anywhere else you need to go in CAPPS HR/Payroll.</p> <p>You can open as many child windows as needed using the New Window link.</p> <p>NOTE: Do not use the browser's File, New Window (or File, New Tab) feature. CAPPS does not support this type of functionality.</p> <p>Click the New Window link.</p> <p>New Window</p>

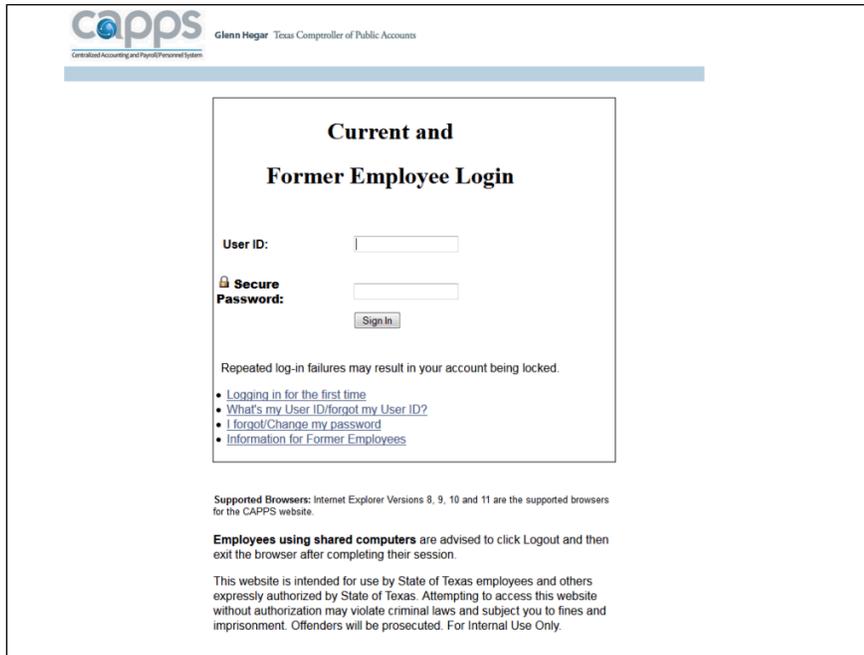


Step	Action
42.	<p>The system opens a new browser window on the Job Data search page.</p> <p>Click the Maximize/Restore button.</p> 

Step	Action
43.	<p>Click the Close button when you have finished using the new window. This action returns you to the original window.</p> <p>Click the Close button.</p> 
44.	<p>You can change your browser settings so that it opens a new tab in your browser instead of a new window.</p> <p>In Internet Explorer, the path is Tools > Internet Options > Tabs Settings > Always open pop-ups in a new tab (<i>note: depending on your version of Internet Explorer, or Safari, or Google Chrome, or Firefox, your path to these settings may vary</i>).</p> <p>For more help on this feature, contact the IT Help Desk.</p>
45.	<p>Now, each time you click the New Window link, a new tab is displayed at the top of the page instead of a new window.</p> <p>In this example, there are three Job Data tabs instead of three separate windows.</p>



Step	Action
46.	<p>A dotted line under a field (in this example, the employee name Test Hire8) indicates that there is a mouse-over pop-up image associated with this field.</p> <p>As you hover the mouse over a dotted line field, a page pops up near the cursor, and remains until you move the cursor away from that field.</p> <p>Point to the Test Hire8 Employee Name.</p> <p>Test Hire8 -----</p>
47.	<p>More information is displayed in this pop-up page about this employee: Title, Department, Manager, etc.</p> <p>Moving the cursor away from the dotted line field causes the pop-up page to disappear.</p>
48.	<p>If you make changes to the data on a page, you must click the Save button in order for the system to commit your changes to the database.</p> <p>Pages in a component are treated as a single entity when you try to save data. If you have not entered all required fields, the system prompts you to enter additional data, even when required fields are not currently visible (in other words, a required field MIGHT be on another tab in this component).</p> <p>Click the Save button.</p> 
49.	<p>When you have finished using CAPPS, you should sign out of the system before you close your browser window. This tells the system to close out your session, and the system can do various clean-up procedures to securely log you out of the CAPPS system.</p> <p>Click the Sign out link.</p> <p>Sign out</p>
50.	<p>The system logs you off and returns you to the Sign In page.</p>



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

Using Personal Preferences

Section 2 - Exercises - Lesson 2: Using Personal Preferences

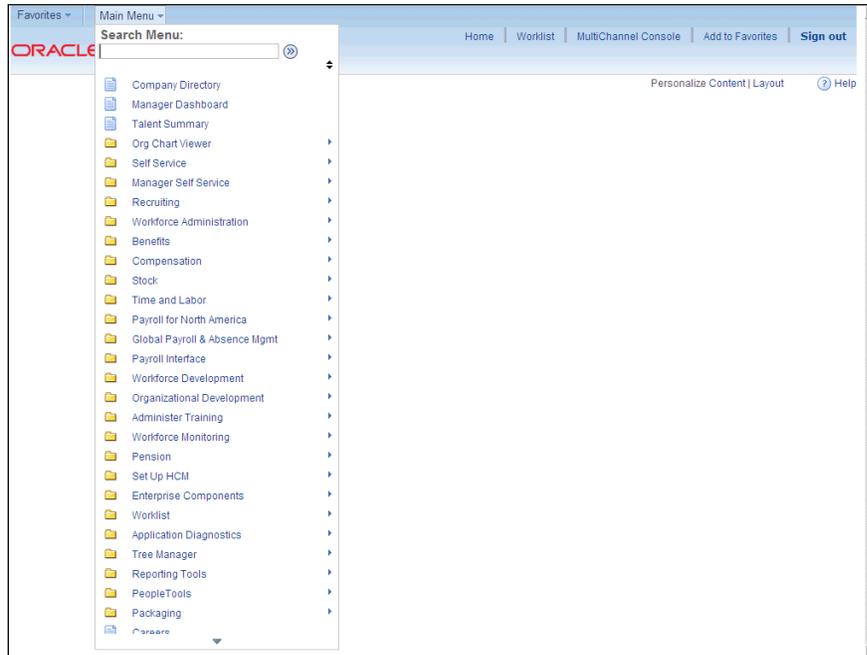
In CAPPS HR /Payroll, you can set some **personal preferences** to use in the system.

To set personal preferences, use these links located at the bottom of the **Main Menu**:

- Change my password
- My System Profile

Procedure

This lesson covers how to use Personal Preferences in the CAPPS HR/Payroll system.



Step	Action
1.	<p>CAPPS HR/Payroll lets you personalize your workspace based on your needs, style of work, preference for mouse or keyboard, and other options.</p> <p>Begin by navigating to the Change Password page.</p> <p>Point to the Scroll Down button on the Main Menu.</p>
2.	<p>Click the Change My Password menu item.</p>  Change My Password
3.	Use the Change Password page to reset your PeopleSoft password.
4.	Your administrator may implement specific password controls, such as a minimum number of characters, as well as a mix of types of characters, which could result in additional requirements for password changes.
5.	You must click the Change Password button to save your changes.
6.	<p>Navigate to the General Profile Information page.</p> <p>Click the Main Menu link.</p> 
7.	<p>Click on the Scroll Down button on the Main Menu.</p> 

Step	Action
8.	Click the My System Profile menu item.  My System Profile
9.	Use the General Profile Information page to set general profile preferences. Options include changing your password, setting up or changing your password hints, choosing your preferred language and currency code, assigning an alternate user for your workflow or messaging while you are away, workflow attributes, and your primary email address. Some of these options might not be available to all users, depending on security settings and job role responsibilities in CAPPS HR/Payroll.
10.	Congratulations! You have successfully completed this lesson. End of Procedure.

Section 3. Using Keys and Search Pages

Section 3 - Using Keys and Search Pages

This section provides an overview of **keys** and **search pages**, and describes how to use **search pages** to retrieve the data you need.

Upon completion of this section, you will be able to:

- Describe how keys are used to perform a search
- Perform a Basic and Advanced search
- Use an operator to perform a search
- Use a wildcard to perform a search

Understanding Keys

Section 3 - Exercises - Lesson 1: Understanding Keys

This lesson is a brief introduction to **keys** and **key fields**.

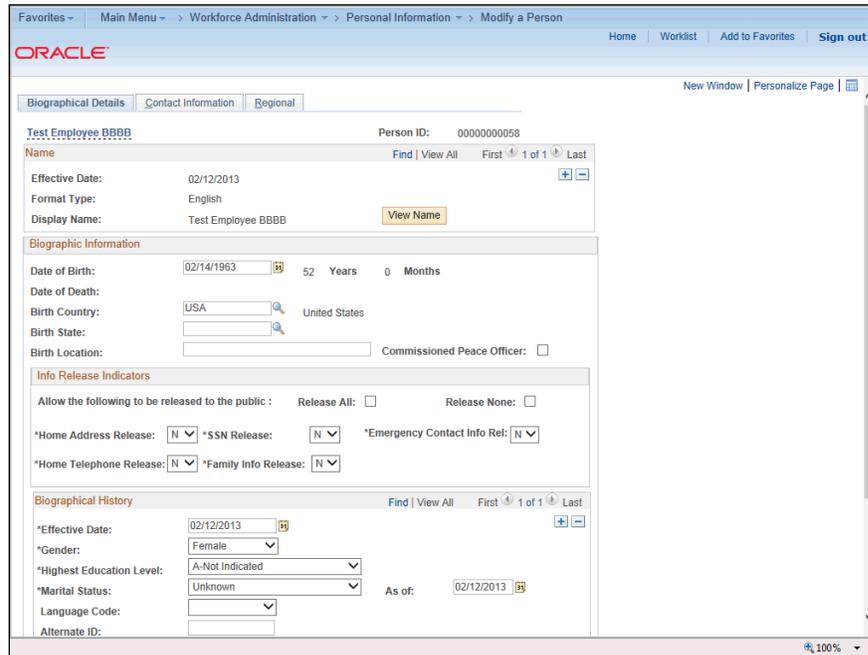
A field -- or a combination of fields -- that uniquely identifies your data is called a **key**. For example, the Employee ID field (**Empl ID**) uniquely identifies an employee record, so **Empl ID** is a **key field**.

As another example, if your employees enroll in training classes, then the combination of Employee ID, Course Code, and Course Start Date uniquely identifies an enrollment request. In this case, those three fields are the **key fields** for a particular enrollment request.

Whenever you open a page or component in CAPPS HR/Payroll, a search page typically appears, allowing you to search using the keys needed to locate the data you need.

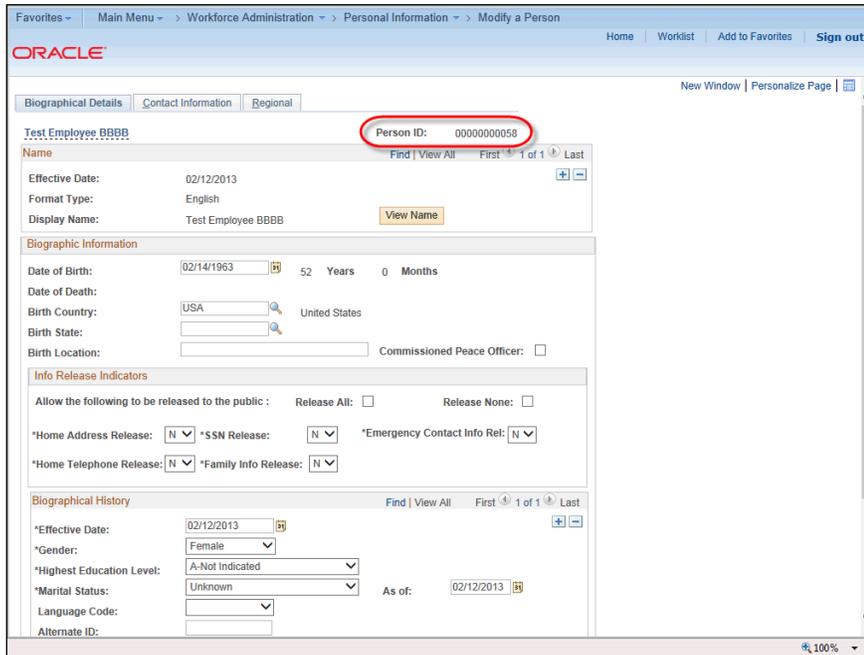
Procedure

This lesson is a brief introduction to keys and key fields.



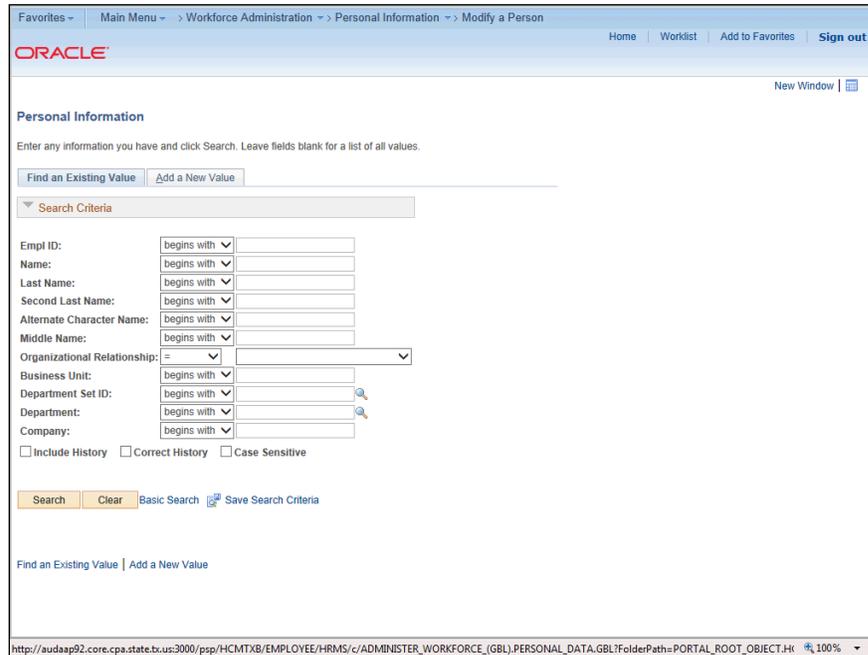
The screenshot shows the Oracle HR/Payroll interface for modifying a person's information. The breadcrumb trail is: Favorites -> Main Menu -> Workforce Administration -> Personal Information -> Modify a Person. The page title is 'ORACLE' and the user is signed out. The main content area is divided into several sections: 'Biographical Details' (with sub-tabs for Contact Information and Regional), 'Biographic Information', 'Info Release Indicators', and 'Biographical History'. The 'Biographical Details' section shows the person's name, effective date, format type, and display name. The 'Biographic Information' section includes date of birth, date of death, birth country, birth state, and birth location. The 'Info Release Indicators' section contains checkboxes for releasing information to the public and dropdown menus for specific release types. The 'Biographical History' section shows the effective date, gender, highest education level, marital status, language code, and alternate ID.

Step	Action
1.	A field – or a combination of fields – uniquely identifies every row in a table in the CAPPS HR/Payroll database. For example, a Person ID uniquely identifies each row in the Personal Information table.
2.	<p>Most transaction pages or components have search records associated with them. If you select other pages that have a common search record (such as pages within a component, or an associated link), you will not be asked to enter search criteria again.</p> <p>You are prompted for new search keys only when you select a new page outside of a component, and the new page uses different keys.</p>



The screenshot shows the Oracle HR/Payroll system interface for 'Modify a Person'. The 'Person ID' field is highlighted with a red circle. The page displays biographical details for 'Test Employee BBBB', including effective date (02/12/2013), birth date (02/14/1963), and biographical history.

Step	Action
3.	<p>Fields that uniquely identify your data are called keys. To display a page, you enter the search key(s) on the search page so that the system can retrieve the correct row of data.</p> <p>For example, if you want to review a summary of absence history for your employees, you must specify or search for the data by using a Person ID.</p>
4.	<p>A search record is the list of defined search keys that help you locate data. The search keys are the fields you are prompted for on a search page.</p> <p>For example, you can search for an employee by using one or a combination of the keys displayed on this page.</p>



Step	Action
5.	<p>Let's look at searching for someone using key fields.</p> <p>We will use the Personal Information Search Criteria page as our example.</p> <p>Use the Find an Existing Value tab to look up someone. Narrow your search by entering search criteria in more than one field. Full or partial values may be entered in any of the search criteria fields.</p> <p>You are not sure of the exact employee ID but know that it begins with zero.</p> <p>Enter 0 into the Empl ID begins with field.</p> <input data-bbox="440 1430 711 1465" type="text"/>
6.	<p>There could be hundreds (or thousands) of employee IDs beginning with zero.</p> <p>The more search criteria you enter, the more specific your search will be.</p> <p>In this example you are going to use a name that begins with 'test,' so enter test in the Name field.</p> <input data-bbox="440 1703 711 1738" type="text"/>

Step	Action
7.	<p>You know that the last name contains the letters 'rp.'</p> <p>Click the begins with for Last Name drop-down list.</p> <p><input type="text" value="begins with"/></p>
8.	<p>Click the contains list item.</p> <p><input type="text" value="contains"/></p>
9.	<p>Enter rp into the Last Name contains field.</p> <p><input type="text"/></p>
10.	<p>Click the Search button to find the record(s) that match these values.</p> <p><input type="button" value="Search"/></p>
11.	<p>The system retrieves nine (9) records matching your search criteria, and displays them in the Search Results grid.</p> <p>In this example, all nine records have an Empl ID that begins with 0, a Name that begins with TEST, and a Last Name that contains RP.</p>
12.	<p>The values in the Search Results grid are all links because we are on an Advanced Search page.</p> <p>In the next lesson (Understanding Search Pages), you will learn the difference between an Advanced Search page and a Basic Search page.</p> <p>To open the Personal Information component for a particular result, click on a link in that particular row.</p> <p>Click the 00000000193 link.</p> <p>00000000193</p>
13.	<p>The system displays the Personal Information component for Test BRP1, who has a Person ID of 00000000193.</p> <p>The component displays the Biographical Details tab; the Contact Information and Regional tabs provide additional details for this Person.</p>
14.	<p>At the bottom of the page, Previous in List and Next in List allow you to view adjacent records without going back to the Search Results page.</p> <p>Previous in List is grayed out since this is the first record in the Search Results grid.</p>
15.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Understanding Search Pages

Section 3 - Exercises - Lesson 2: Understanding Search Pages

This lesson introduces you to Searching in CAPPS HR/Payroll.

When you open a page or component, a search page appears, prompting you for the search keys needed to locate the data. To help you easily find the data you are looking for, especially when there are many rows of data, CAPPS provides a Search feature. Search **operators** enable you to search using limited amounts of information.

There are two types of **search pages**:

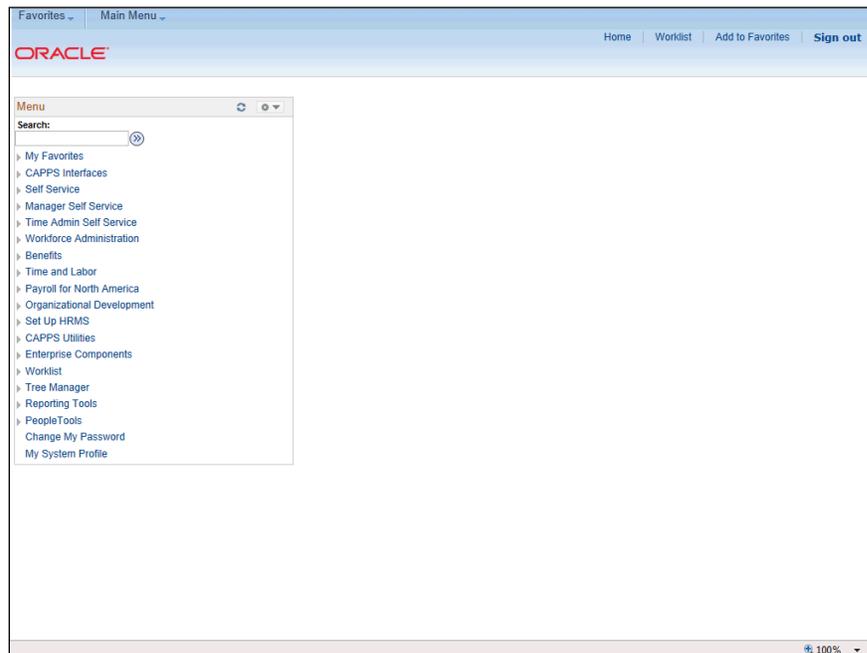
1. **Basic Search** pages, and
2. **Advanced Search** pages

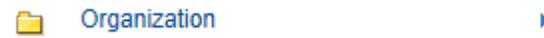
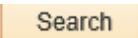
A **Basic Search** page lets you search by just one field at a time. If the data you are looking for has more than one search field, select the appropriate field from the Search drop-down list box. You can perform a search using a partial string or a full value.

On an **Advanced Search** page, you can easily filter your results and narrow your search by searching on more than one field at a time.

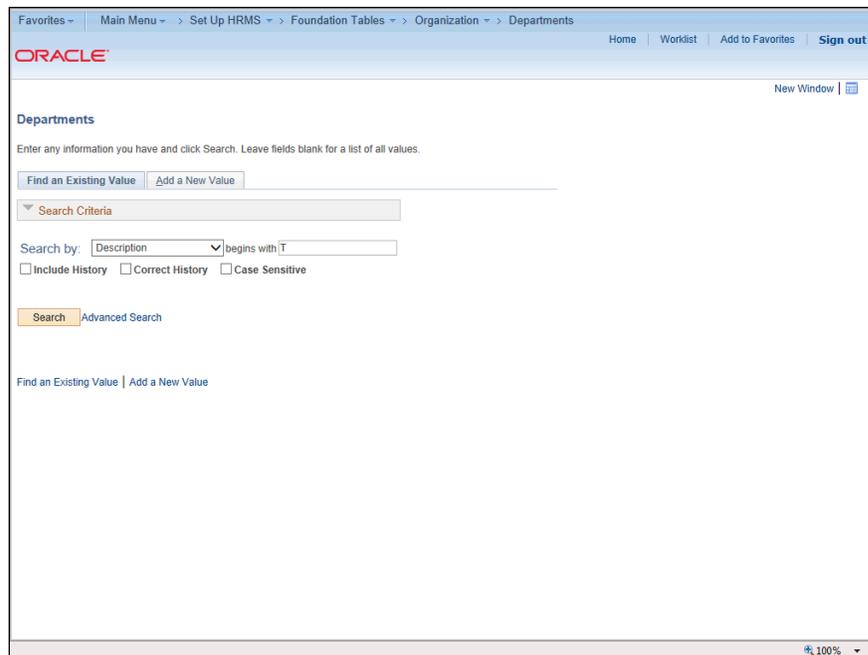
Procedure

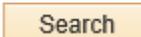
This lesson introduces you to Search functionality in CAPPS HR/Payroll.



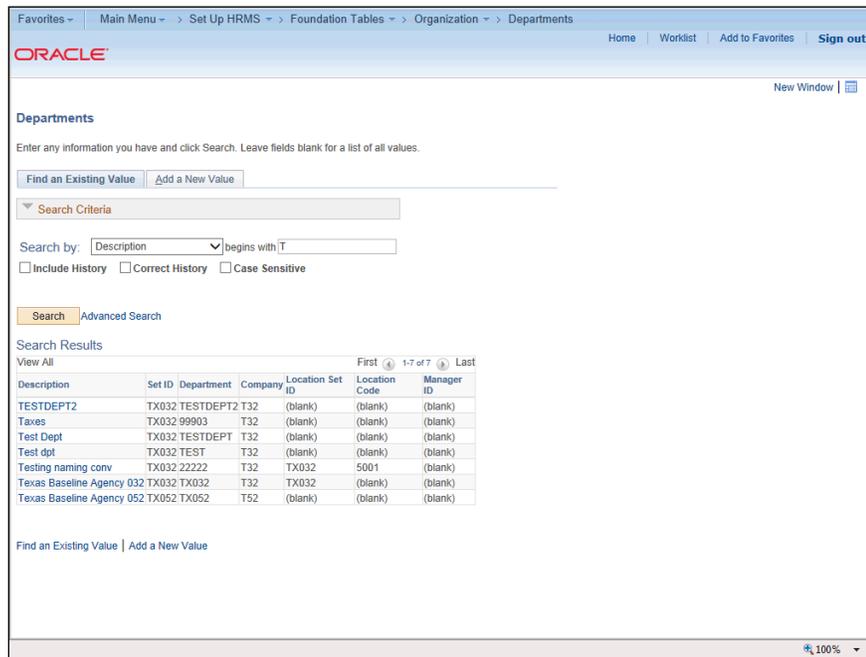
Step	Action
1.	<p>In this lesson, you will learn about basic and advanced searches using keys and operators.</p> <p>Begin by navigating to the Location page.</p> <p>Click the Main Menu button.</p> 
2.	<p>Click the Set Up HRMS menu.</p> 
3.	<p>Click the Foundation Tables menu.</p> 
4.	<p>Click the Organization menu.</p> 
5.	<p>Click the Location link.</p> 
6.	<p>When you select a page such as Location, the system often displays a Find an Existing Value tab (or something similar) that lets you search for a particular value or values.</p> <p>In this example, the default search page is an Advanced Search page because multiple fields (Location Code, Description, Geog Location Code, etc.) are available for searching.</p>
7.	<p>There are significant differences between an Advanced Search and a Basic Search.</p> <p>Click the Basic Search link.</p> 
8.	<p>Typically, a Basic Search page offers one field (or at most two fields) with which you may search for data.</p> <p>The drop-down list (which in this example shows SetID) allows you to pick which key field you want to search.</p> <p>In this example you will use the Basic search feature to search on SetID = TX032.</p> <p>Click the Search button.</p> 
9.	<p>The system displays 10 rows of results in the Search Results grid. These 10 locations are stored in the SetID = TX032.</p>

Step	Action
10.	<p>Here is another example of a Basic Search page, but this time you are looking up a Department.</p> <p>On a Basic Search page, you have the option of changing the search criteria.</p> <p>The Search by drop-down list lets you select a different search key (a different field) to search against. You can enter full or partial values for the key field.</p> <p>For example, assume that you do not know the SetID of the Department, but you do know that the Description begins with T.</p> <p>Click the button to the right of the Search by field.</p> 
11.	<p>Click the Description list item.</p> 
12.	<p>Enter "T" into the Description begins with field.</p>



Step	Action
13.	<p>Click the Search button.</p> 

Step	Action
14.	<p>The system shows all rows matching your search criteria in the Search Results grid.</p> <p>In this example, these 7 departments all have a Description that begins with T. You are looking for the Texas Baseline Agency 032.</p>

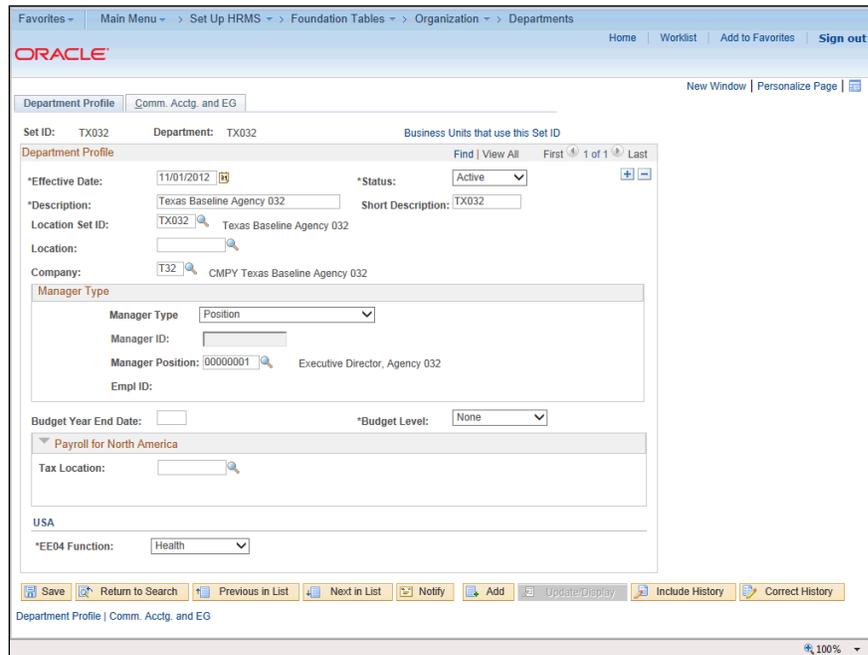


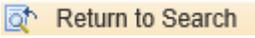
Search Results

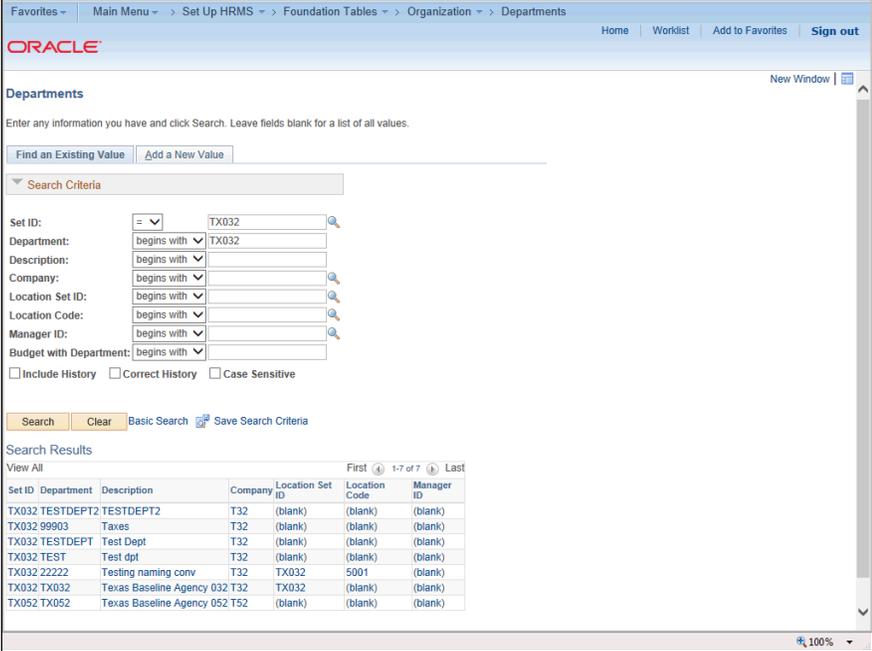
Description	Set ID	Department	Company	Location Set ID	Location Code	Manager ID
TESTDPT2	TX032	TESTDPT2	T32	(blank)	(blank)	(blank)
Taxes	TX032	99903	T32	(blank)	(blank)	(blank)
Test Dept	TX032	TESTDPT	T32	(blank)	(blank)	(blank)
Test dept	TX032	TEST	T32	(blank)	(blank)	(blank)
Testing naming conv	TX032	22222	T32	TX032	5001	(blank)
Texas Baseline Agency 032	TX032	TX032	T32	TX032	(blank)	(blank)
Texas Baseline Agency 052	TX052	TX052	T52	(blank)	(blank)	(blank)

Step	Action
15.	<p>Another significant difference between a Basic Search and an Advanced Search: on a basic search page, <i>only the first column</i> in the Search Results grid is displayed as a link.</p> <p>Click the Texas Baseline Agency 032 link.</p> <p>Texas Baseline Agency 032</p>
16.	<p>The system displays the Departments component; the first tab is the Department Profile page for the Texas Baseline Agency 032 department.</p> <p>Note: The Key Fields from the search page appear at the top of this page as display-only fields:</p> <p>SetID = TX032, and Department [Code] = TX032</p>

Step	Action
17.	The system has two useful buttons at the bottom of the page. Previous in List goes to the previous item from the Search Results grid we saw earlier.
18.	Next in List takes you to the next item from the Search Results Grid.



Step	Action
19.	If you want to start a new Search, click the Return to Search button. Click the Return to Search button. 



Departments

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Set ID: [dropdown] TX032

Department: begins with [dropdown] TX032

Description: begins with [dropdown]

Company: begins with [dropdown]

Location Set ID: begins with [dropdown]

Location Code: begins with [dropdown]

Manager ID: begins with [dropdown]

Budget with Department: begins with [dropdown]

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

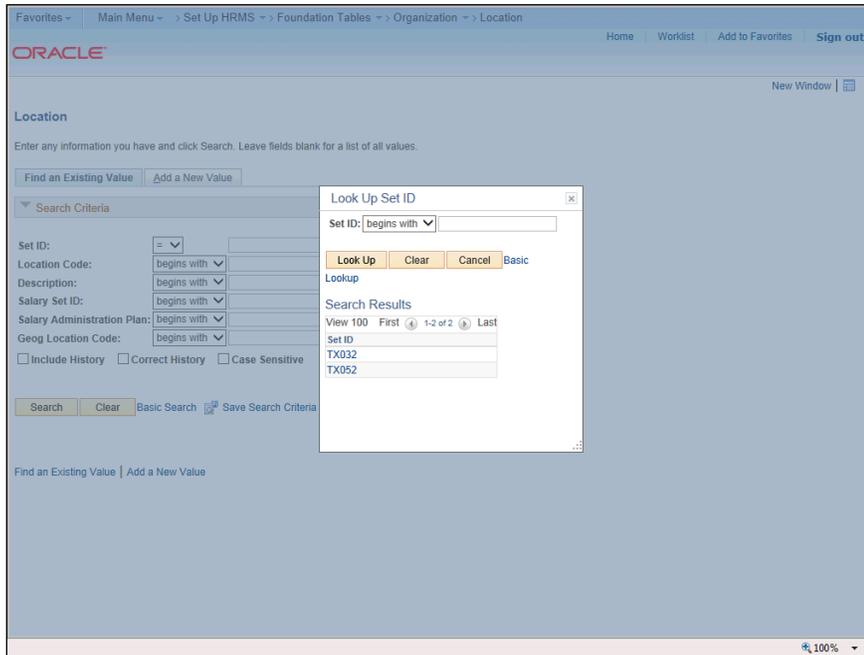
Search Results

View All First 1-7 of 7 Last

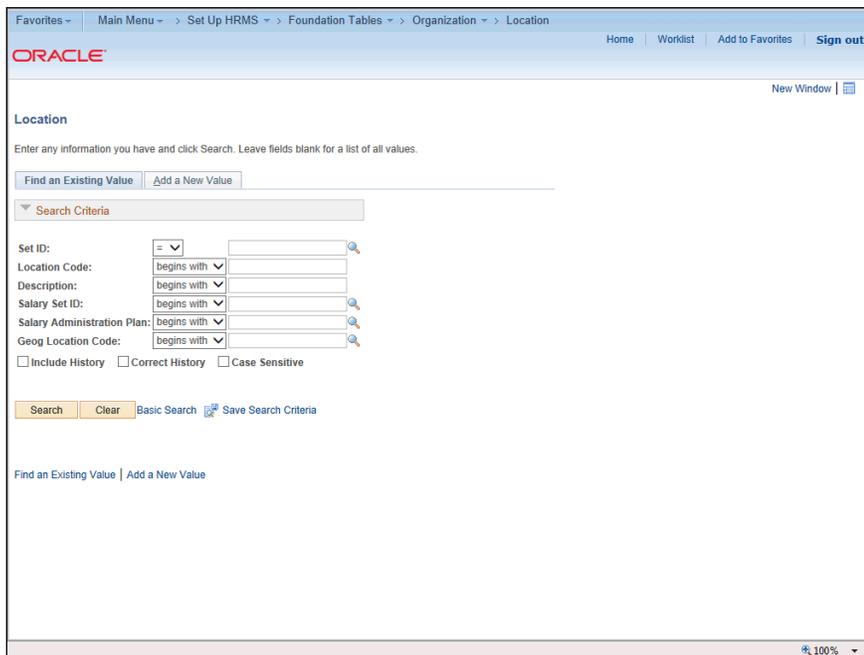
Set ID	Department	Description	Company	Location Set ID	Location Code	Manager ID
TX032	TESTDEPT2	TESTDEPT2	T32	(blank)	(blank)	(blank)
TX032	99903	Taxes	T32	(blank)	(blank)	(blank)
TX032	TESTDEPT	Test Dept	T32	(blank)	(blank)	(blank)
TX032	TEST	Test dpt	T32	(blank)	(blank)	(blank)
TX032	22222	Testing naming conv	T32	TX032	5001	(blank)
TX032	TX032	Texas Baseline Agency 032	T32	TX032	(blank)	(blank)
TX052	TX052	Texas Baseline Agency 052	T52	(blank)	(blank)	(blank)

Step	Action
20.	<p>The system takes you back to the Advanced Search page, displaying the previous search's criteria and results.</p> <p>To search again with new criteria, use the Clear button.</p> <p>Click the Clear button.</p> <p>Clear</p>
21.	<p>In many cases, a Search requires at least one field with some criteria entered.</p> <p>Click the Search button.</p> <p>Search</p>
22.	<p>In this example (searching for a Location), the SetID field is required in order to do a search on the Location page.</p> <p>The system usually highlights the required field in red, and the error message is telling you that you must enter a value in this empty field.</p> <p>Click the OK button.</p> <p>OK</p>
23.	<p>Enter "TX032" into the SetID field.</p> <p><input style="border: 2px solid red;" type="text"/></p>

Step	Action
24.	Click the Search button. 
25.	There is a functional limitation to the Search Results in CAPPS. If the system finds 300 results, it will stop searching any further, and will present those 300 rows in the Search Results grid. The limitation is built in for efficiency and performance reasons. This, of course, forces you to narrow your search using various criteria.
26.	Typically, the system displays the first 100 rows of results on this first page, and navigation buttons let you view the remaining entries in the Search Results grid.
27.	Use the browser's Vertical Scrollbar to scroll down through the first 100 rows of data in the Search Results grid.
28.	Click the right arrow (the Show next rows button) at the top of the grid to view the next set of listings (for this example, we mean rows 101 - 200). Click the Show next rows button. 
29.	The system displays the second page of results.
30.	Sometimes, you may not remember the appropriate values for a field. You can use the Lookup icon (the magnifying glass icon) next to any field to see the possible values that can go into that field. Click the Lookup button. 
31.	The system opens up a modal pop-up window, and displays the Look Up SetID page. In this example, there are 2 SetID's listed: TX032 and TX052.



Step	Action
32.	Click the Cancel button. <div style="text-align: center; margin-top: 10px;">  </div>

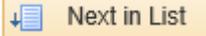
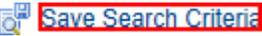
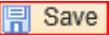


Step	Action
33.	<p>You can narrow a search by using a key (or combination of keys) with full or partial values.</p> <p>For example, you know that the location you are looking for is associated with SetID = TX032, and the Location Code begins with 5.</p> <p>Enter "TX032" into the SetID field.</p> <div style="border: 1px solid red; width: 150px; height: 15px; margin-left: 20px;"></div>
34.	<p>Enter "5" into the Location Code field.</p> <div style="border: 1px solid red; width: 150px; height: 15px; margin-left: 20px;"></div>
35.	<p>Click the Search button.</p> <div style="background-color: #f4b084; padding: 2px 5px; display: inline-block; margin-left: 20px;">Search</div>
36.	<p>The system returns 5 rows that match these criteria, and displays them in the Search Results grid.</p>
37.	<p>On an Advanced Search page, all the columns in the Search Results grid list will have values displayed as links.</p> <p>Click the 5002 link in the Description column.</p> <div style="border: 1px solid #ccc; padding: 2px; margin-left: 20px;"> 5002 - 12451 Twinkle Toes Cir </div>
38.	<p>The system displays the Location Address page (of the Location component) for the 5002 Location.</p> <p>The system provides Search List Navigation buttons to help you process your search results. These buttons are below the informational area of the page.</p>
39.	<p>The Return to Search button returns you to the search page for this particular transaction type.</p>
40.	<p>The Previous in List button displays data for the previous item in your Search Results grid seen earlier.</p> <p>(This button will be grayed out if the data displayed is the first row in the Search Results grid.)</p>
41.	<p>The Next in List button displays data for the previous item in your Search Results grid seen earlier.</p> <p>(This button will be grayed out if the data displayed is the last row in the Search Results grid.)</p>

CAPPS HR/PAYROLL

EUT Course



Step	Action
42.	<p>The Search Results grid had 5 rows of data.</p> <p>Click the Next in List button.</p> 
43.	<p>The next Location record from the Search Results grid is for the 5003 location.</p> <p>You can continue to use the Next in List and Previous in List buttons to look at all the rows from your Search Results grid.</p>
44.	<p>You can also return to the search page for additional searches.</p> <p>Click the Return to Search button.</p> 
45.	<p>If you plan to use these search criteria again, you can save them.</p> <p>Click the Save Search Criteria link.</p> 
46.	<p>Name your search.</p> <p>Enter "TX032 Loc 5" into the Name of Search field.</p> <input data-bbox="347 1115 721 1157" type="text"/>
47.	<p>Click the Save button.</p> 
48.	<p>The system confirms that it saved your search.</p> <p>Click the Return to Advanced Search link.</p> 
49.	<p>A new field appears just under the Search Criteria header: Use Saved Search. You can select a saved search from this drop-down list.</p> <p>Once a search has been saved, that specific search record is available for use in this page (as well as other search pages as long as they use the same search record).</p>
50.	<p>You can also delete a saved search by using the Delete Saved Search link.</p>

Step	Action
51.	<p>For any criteria, you can use the Case Sensitive option. Select this option by clicking the checkbox next to it.</p> <p>This forces the search results to match the case you enter in the criteria fields</p> <p>Case Sensitive refers to upper-case letters (A, B, C, etc.) and lower-case letters (a, b, c, etc.).</p> <p>Case Sensitive means that <i>test</i> is NOT the same as <i>Test</i>.</p>
52.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Using Operators and Wildcards

Section 3 - Exercises - Lesson 3: Using Operators and Wildcards

To help you easily find the data you are looking for, especially when there may be many rows of data to search, CAPPS provides the Search feature. Search functionality lets you search using limited amounts of information, such as a partial string of numbers for an employee ID, using search **Operators**. Operators include filter criteria such as:

- begins with
- contains
- > (*greater than*)
- < (*less than*)
- *etc.*

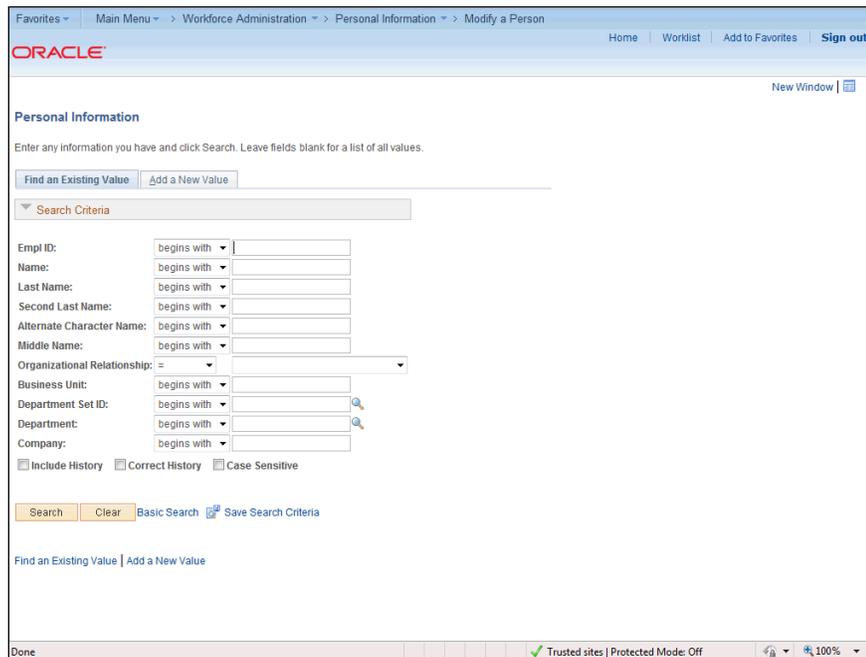
On an **Advanced Search** page, you can narrow your search by searching on more than one field at a time and by using a variety of search operators.

A **wildcard** is a special symbol that can stand for one or more characters. Wildcards are useful in retrieving data when you are unsure of the possible values. Wildcards only work with the operators 'begins with' and 'contains.'

Procedure

This lesson introduces using **Operators** and **Wildcards** while searching in CAPPS HR/Payroll.

Step	Action
1.	<p>Recall that you saw Search pages in the lesson Understanding Search Pages CAPPS HR/Payroll.</p> <p>Take a closer look at the Personal Information Search Criteria page. This is an Advanced Search page, because multiple fields are available for use as criteria in narrowing down a search.</p>



The screenshot shows the Oracle CAPPS HR/Payroll interface for the 'Personal Information' search criteria page. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Personal Information > Modify a Person. The page title is 'Personal Information' and it includes a 'New Window' button. Below the title, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' dropdown menu is expanded, showing a list of search criteria fields. Each field has a dropdown menu set to 'begins with' and a text input field. The fields are: Empl ID, Name, Last Name, Second Last Name, Alternate Character Name, Middle Name, Organizational Relationship (set to '='), Business Unit, Department Set ID, Department, and Company. Below the fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom of the search criteria section are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search criteria section are the same two buttons: 'Find an Existing Value' and 'Add a New Value'. The browser status bar at the bottom shows 'Done', 'Trusted sites | Protected Mode: Off', and a zoom level of 100%.

Step	Action
2.	<p>You can narrow your search by entering criteria in more than one field, and by entering a variety of search Operators. In this example, the displayed operators are "begins with" and "=". (You will see a more complete list of operators shortly.)</p> <p>On an Advanced Search page, you can use different operators, in multiple fields.</p> <p>You want to look up Personal information for an employee, but you have limited information to use for searching. You don't know the employee ID, but you do know that it begins with zero.</p> <p>Enter 0 into the Empl ID begins with field.</p> <p>Empl ID: <input type="text" value="begins with"/> <input style="border: 2px solid red;" type="text" value="0"/></p>

Step	Action
3.	<p>There could be hundreds (or thousands) of Empl IDs (Employee IDs) beginning with zero.</p> <p>You know the employee's Name begins with test; enter test into the Name field.</p> <p>Name: <input type="text" value="begins with"/> <input style="border: 2px solid red;" type="text"/></p>
4.	<p>Click the begins with for Last Name dropdown list.</p> <p><input type="text" value="begins with"/></p>
5.	<p>Here is a complete list of Operators for use in searching a field; not all operators are appropriate for all types of fields.</p> <p>begins with: search a <i>text field</i> using a string of alpha and/or numeric characters; the system finds values that match the string at the <i>beginning</i> of the field.</p> <p>contains: search a <i>text field</i> using a string of alpha and/or numeric characters; the system finds values that match the string as long as the field <i>contains</i> the string of characters, anywhere in the field.</p>
6.	<p>= (Equals): search <i>any field</i> for an exact match using a string of characters; the system finds values that <i>exactly</i> match the string of characters.</p> <p>not = (not equal to): search <i>any field</i> using a string of characters; the system finds values that <i>do NOT</i> exactly match the string of characters.</p>
7.	<p>< (less than): search <i>any field</i> using a string of characters; the system finds values that are less than the string of characters.</p> <p><= (less than or equal to): search <i>any field</i> using a string of characters; the system finds values that are less than or equal to the string of characters.</p> <p>> (greater than): search <i>any field</i> using a string of characters; the system finds values that are greater than the string of characters.</p> <p>>= (greater than or equal to): search <i>any field</i> using a string of characters; the system finds values that are greater than or equal to the string of characters.</p>
8.	<p>between: when choosing <i>between</i>, the system opens two criteria fields; enter a minimum value in the first field, and a maximum value in the second field; search <i>any field</i> using a string of characters; the system finds values that are between the search criteria strings.</p> <p>in: when choosing <i>in</i>, the system allows you to enter a comma separated <i>list</i> of values; search <i>any field</i> using a string of characters; input multiple comma separated strings; the system finds values that are in your list.</p>

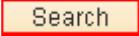
Step	Action
9.	<p>You know that the last name contains the letters "rp."</p> <p>Click the contains list item.</p> <p>contains</p>
10.	<p>Enter rp into the Last Name contains field.</p> <p>Last Name: <input type="text" value="contains"/> <input type="text"/></p>
11.	<p>Your search criteria are:</p> <ul style="list-style-type: none"> Empl ID begins with '0' Name begins with 'test' Last Name contains 'rp' <p>Click the Search button to find the record(s) that match these values.</p> <p><input type="button" value="Search"/></p>
12.	<p>9 (nine) records are displayed in the Search Results grid matching these search criteria.</p>
13.	<p>If the search criteria you just entered are for a search that you might want to use again, you can save the search.</p> <p>Click the Save Search Criteria link.</p> <p><input type="button" value="Save Search Criteria"/></p>
14.	<p>The system displays the Save Search As page. Note that this page lists the criteria that will be saved for this search.</p> <p>Give the search a meaningful name.</p> <p>Enter Personal Info 0 TEST RP into the Name of Search: field.</p> <p><input type="text"/></p>
15.	<p>Click the Save button.</p> <p><input type="button" value="Save"/></p>
16.	<p>The system will confirm that it saved your search.</p> <p>Click the Return to Advanced Search link.</p> <p><input type="button" value="Return to Advanced Search"/></p>
17.	<p>A Use Saved Search field appears just under the Search Criteria header; you can select a saved search from this drop-down list.</p> <p>Once a search has been saved, that specific search record is available for use in this page (as well as other search pages as long as they use the same search record).</p>

Step	Action
18.	You can also delete any saved search by first selecting it in the Use Saved Search field, and then clicking on the Delete Saved Search link.
19.	To clear all fields of any search criteria, click the Clear button.
20.	In addition to operators , searching in CAPPS HR/Payroll supports wildcards. Wildcard characters can only be used in text fields, and will only work with the first two operators: begins with and contains .
21.	Two wildcard characters can help you find information by "standing for" one or more characters in your search string. % (percent sign) : use the percent sign as a wildcard for one or many characters. _ (underscore) : use the underscore as a wildcard for only one character.
22.	For example, using the underscore character, you could search for this string: "st_ve" and the system might find the values: Steve stove
23.	If you used the percent sign character, you could search for this string: "st%" and the system might find the values: Steve stove Stephanie ST Notice that the last value, ST, is found because the % character can also mean "no characters."
24.	You are looking up Personal Information for an employee, and you know that the Empl ID begins with '0' and also contains '99' but your are not sure of any intervening digits. Enter 0%99 into the Empl ID field. Empl ID: <input type="text" value="begins with"/> <input type="text"/>

CAPPS HR/PAYROLL

EUT Course



Step	Action
25.	Click the Search button. 
26.	The system finds three rows of data: Empl ID 0000000099 and Empl ID 0000000199 and Empl ID 0000000299 . The system retrieved 3 rows into the Search Results grid, because each begins with '0' and each contains the characters '99' somewhere after the initial 0.
27.	While the percent sign matches one or more characters, the underscore wildcard matches a single character only. Enter 0_99 into the Empl ID field. Empl ID: <input type="text" value="begins with"/> 
28.	Click the Search button. 
29.	We searched for an Empl ID where the four-digit value begins with '0,' has any character in the second position, and ends with '99.' The system returns the message " No matching values were found. "
30.	Enter 00000002_1 into the Empl ID field. Empl ID: <input type="text" value="begins with"/> 
31.	Click the Search button. 
32.	Click the Vertical Scrollbar to scroll down the page.
33.	The system found 6 (six) rows of data. 00000000201 00000000211 00000000211 (it found this value twice, because this Empl ID exists in two separate Business Units) 00000000221 00000000251 00000000261 In all cases, there is a single digit between '000000002' and '1' in the Empl ID .
34.	Congratulations! You have successfully completed the this lesson. End of Procedure.

Section 4. Working with Pages

Section 4 - Working with Pages

Viewing data on pages is how you use CAPPS HR/Payroll (PeopleSoft) applications.

The system presents data in a variety of ways, including reports, grids, fields, and tables. You should recognize and understand the methods for working with **pages**, since you will use pages in most CAPPS HR/Payroll applications.

Upon completion of this lesson, you will be able to:

- Describe page controls.
- Use CAPPS HR/Payroll grids.
- Use the Find feature in PeopleSoft grids.

Recognizing Page Controls

Section 4 - Exercises - Lesson 1: Recognizing Page Controls

Page controls include several types of **data entry fields**, designed to offer different ways to enter and maintain information. Recognizing each type of data entry field helps you use the system more efficiently.

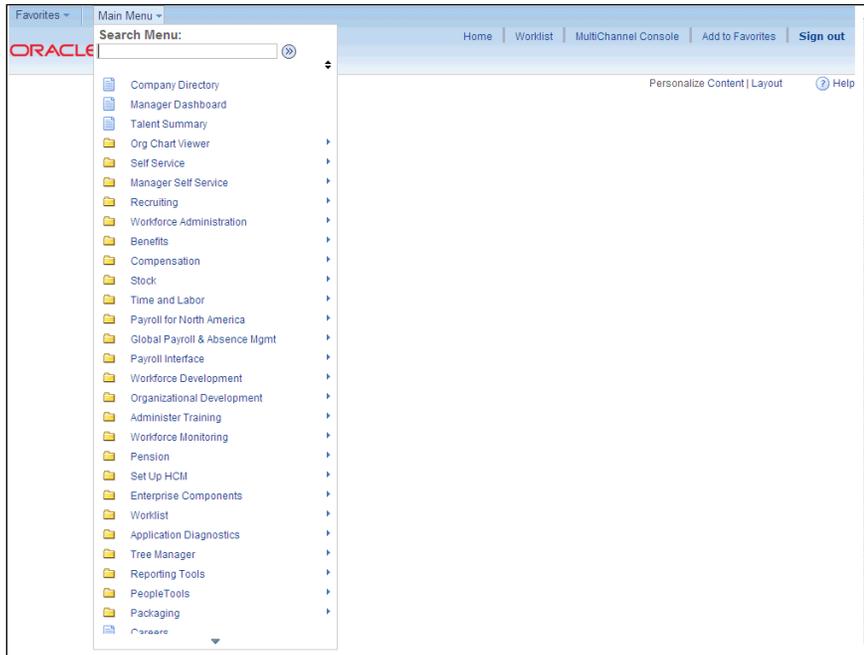
In this lesson, one of your employees is taking a leave for one month in order to volunteer for a local organization. You will update the **Volunteer Activities** page with her information.

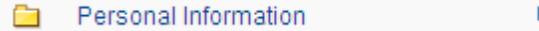
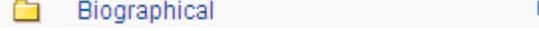
Procedure

This lesson introduces various types of fields and page controls in CAPPS HR/Payroll.

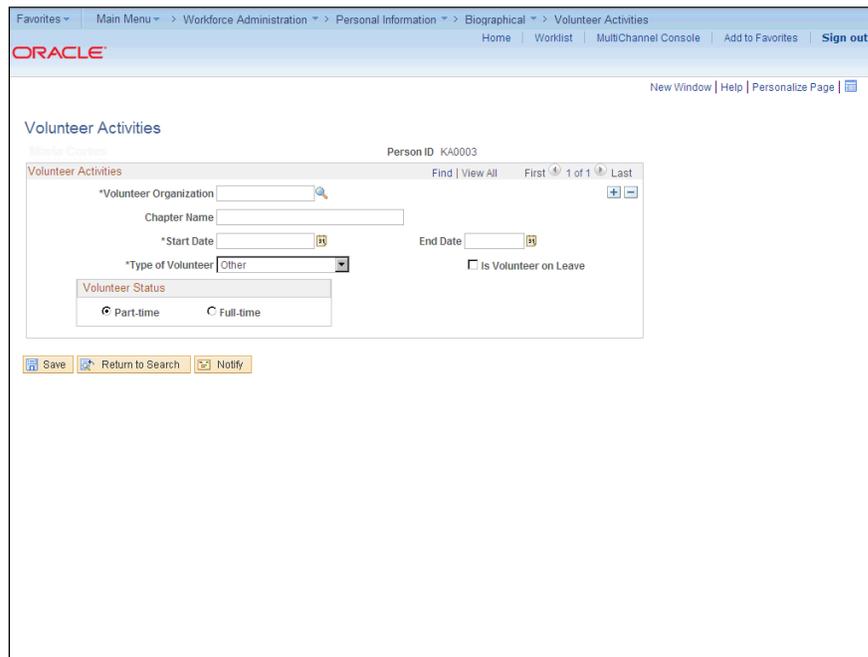
CAPPS HR/PAYROLL

EUT Course



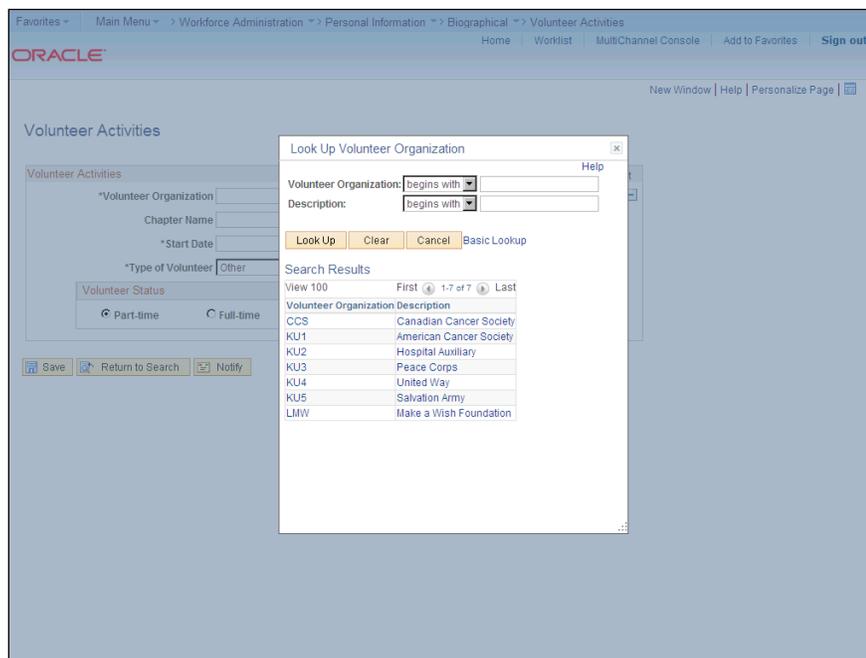
Step	Action
1.	<p>Begin by navigating to the Volunteer Activities page.</p> <p>NOTE: This lesson shows you various types of fields on a typical page in CAPPS HR/Payroll.</p> <p>Click the Workforce Administration menu.</p> <p></p>
2.	<p>Click the Personal Information menu.</p> <p></p>
3.	<p>Click the Biographical menu.</p> <p></p>
4.	<p>Click the Volunteer Activities menu item.</p> <p></p>
5.	<p>Enter "KA3003" into the Empl ID field.</p>
6.	<p>Click the Search button.</p> <p></p>

Step	Action
7.	<p>Take a look at the Volunteer Activities page.</p> <p>On many pages, one or more fields are required. You must enter a valid value in a required field before you can save the page. A required field is usually marked with an asterisk (*).</p> <p>Asterisks next to Volunteer Organization, Start Date, and Type of Volunteer indicate that these are required fields on this particular page.</p>
8.	<p>Take a closer look at the *Volunteer Organization field.</p> <p>This field is an edit box with prompt button. If you know the value you want to use here, you can enter it by typing it into the edit box.</p> <p>This field also has a Look up button, which looks like a magnifying glass. The button can be used to look up a valid value for this field.</p>



Step	Action
9.	<p>Click the Look up button.</p> 

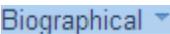
Step	Action
10.	<p>The system opens up a special type of popup window, a modal prompt.</p> <p>A Modal prompt is a child window that requires your input before you can return to the originating page.</p> <p>In this example, the popup window is the Look Up Volunteer Organization modal prompt. There are two columns of data: Volunteer Organization, and Description.</p>



Step	Action
11.	<p>The Look Up Volunteer Organization page displays a list of all valid values for the *Volunteer Organization field. In this example, there are seven (7) volunteer organizations in the database. Emplo TestE will be volunteering at the Make a Wish Foundation.</p> <p>Click the Make a Wish Foundation link.</p> <p>Make a Wish Foundation</p>
12.	<p>Once you select a value from the modal prompt, the system returns you to the original page, and enters the appropriate information into the field.</p> <p>In this example, LMW is the Volunteer Organization, and Make a Wish Foundation is the description next to the field.</p>

Step	Action
13.	<p>Chapter Name is an edit box field. This type of field is also known as a "free-form text" field.</p> <p>An edit box is a rectangular box into which you enter data. The number of characters you can enter is usually determined by the length of the field.</p> <p>An edit box will typically accept any alpha, numeric, or special characters, and usually there is no validation of data in a free-form text field like this.</p>
14.	<p>In this example, add the chapter name for the organization. Note that this is an optional field on this page.</p> <p>Enter "Belmont County" into the Chapter Name field.</p>
15.	<p>The *Start Date field is a typical date field in CAPPS HR/Payroll.</p> <p>A date field has a special date prompt button, which looks like a calendar page icon. Clicking this button opens a small calendar modal prompt that displays the current month and day. If you click on a specific day in the calendar, that value will be entered in this field.</p> <p>A shortcut to entering today's date is to type the character 't' or 'T' or to type the word 'today' into the date field. When you tab out of the date field, or save this page, the system will convert any of those three shortcut values into the current system date in the correct date format.</p>
16.	<p>Click the Choose Date button.</p> 
17.	<p>In this example, you want to select a start date of July 2, 2013.</p> <p>Click the Month dropdown list.</p> <p>June </p>
18.	<p>Click on the July list item.</p> <p>July</p>
19.	<p>Click the 2 link.</p> <p></p>
20.	<p>When you selected the day (2) from the modal prompt calendar for July 2013, the system closed the popup calendar window, and entered the properly formatted date into the *Start Date field.</p>

Step	Action
21.	<p>The *Type of Volunteer field is a list box, or combobox.</p> <p>This kind of field has a dropdown list which can be shown by clicking on the downward-facing triangle icon on the far right of this box.</p> <p>A list box is similar to an edit box with prompt button. Click the down arrow to display a list of values from which you can select a single option.</p>
22.	<p>In this example, Emplo's volunteer work is administrative.</p> <p>Click the Type of Volunteer dropdown list.</p> 
23.	<p>Usually, a list box will have a limited number of choices (in this example, only five (5) choices are possible).</p> <p>Click the Administrative list item.</p> <p><i>Administrative</i></p>
24.	<p>A checkbox is a small square box that turns an option On or Off.</p> <p>Select the box by clicking on it, and the system adds a check mark to the box, and turns this option ON. Click on the box again, and the system removes the check mark, and turns the option OFF.</p> <p>Sometimes, the default value for a checkbox is ON, so the system will display the page with the box already checked.</p> <p>Each checkbox on a page operates independently: in other words, you can select one, many, or all checkboxes, because they each control an on/off switch for a different option or setting.</p>
25.	<p>In this example, the Is Volunteer on Leave checkbox option is off, and you want to turn it on.</p> <p>Click the Is Volunteer on Leave option.</p> 
26.	<p>Radio buttons are NOT independent of one another <i>within a group</i>.</p> <p>A radio button is a small round button representing one option in a group of mutually exclusive options. Only one radio button in a group can be selected (or ON) at a time.</p> <p>The Volunteer Status group box has two radio buttons: Part-time, and Full-time.</p>

Step	Action
27.	<p>In this example, change the Volunteer Status to Full-time.</p> <p>Click the Full-time option.</p> 
28.	<p>The only way to tell the CAPPS HR/Payroll system that you are finished is to Save your work.</p> <p>NOTE: There is no Auto-Save functionality (like the Auto-Save found in MS Word or Excel) in CAPPS HR/Payroll. If you do not save your work, it will not be saved to the system.</p> <p>Click the Save button.</p> 
29.	<p>You have successfully used several page controls to update a record in a CAPPS HR/Payroll application.</p> <p>Now let's look at a long edit box.</p> <p>Navigate to the General Comments page to see a long edit box. In the breadcrumbs (navigation path) at the top of the page, find the name of the appropriate menu item, and click it to display its cascading menu.</p> <p>Click the Biographical link.</p> 
30.	<p>Click the General Comments menu item.</p> 
31.	<p>The Comment field is a multi-line free-form text box. You can enter lengthy text into these types of fields.</p>
32.	<p>If you enter more lines than can be displayed in the default size of the box, a vertical scroll bar will appear on the right side of the box. You can continue entering text up to the character limit of the field, which in some cases is quite large.</p> <p>Use the scroll bar to move through the text.</p>
33.	<p>Congratulations! You have successfully completed this lesson. End of Procedure.</p>

Using CAPPS Grids

Section 4 - Exercises - Lesson 2: Using CAPPS Grids

CAPPS HR/PAYROLL

EUT Course



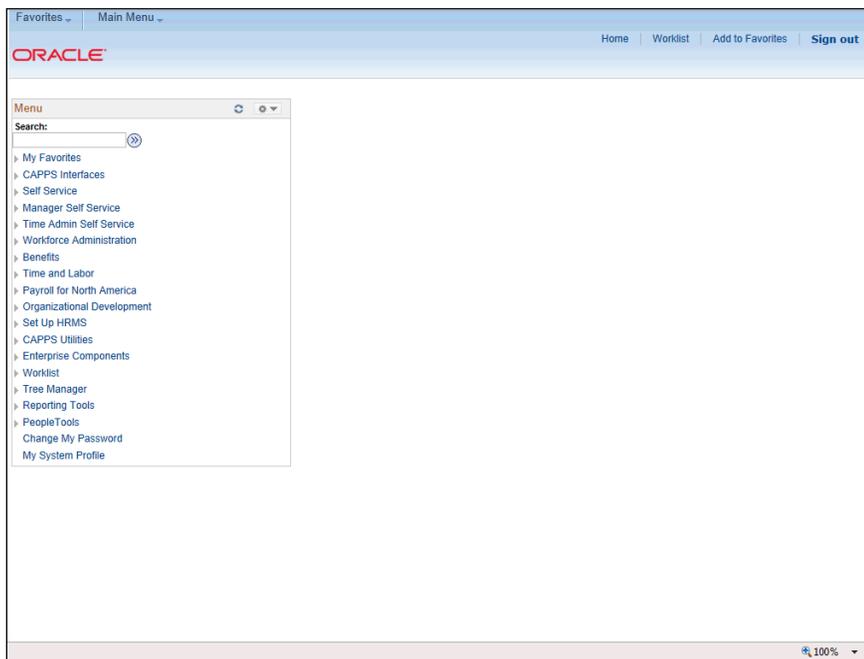
In **grids**, fields appear as columns, and are similar to columns in a spreadsheet. Fields in a grid belong to one table in your database.

Each row of data in the grid represents one record from that table, and is similar to a row in a spreadsheet.

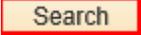
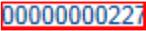
Grids let you look at and distinguish rows of data. A grid may also let you add, edit, and view multiple occurrences of data for a group of fields on a page.

Procedure

This lesson introduces grids as a method of presenting data in CAPPS HR/Payroll.

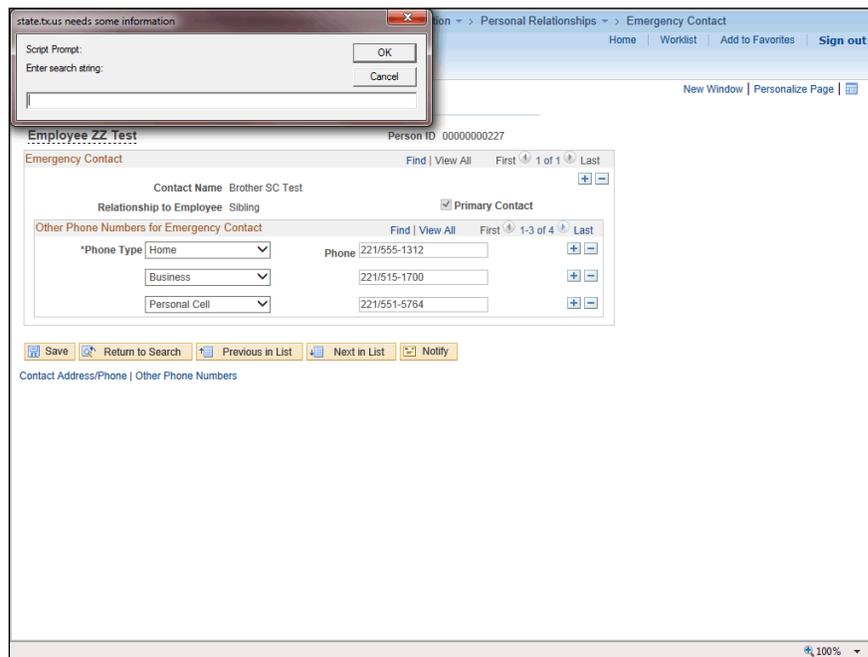


Step	Action
1.	Begin by navigating to the Emergency Contact page. Click the Main Menu button. 
2.	Click the Workforce Administration menu. 
3.	Click the Personal Information menu. 

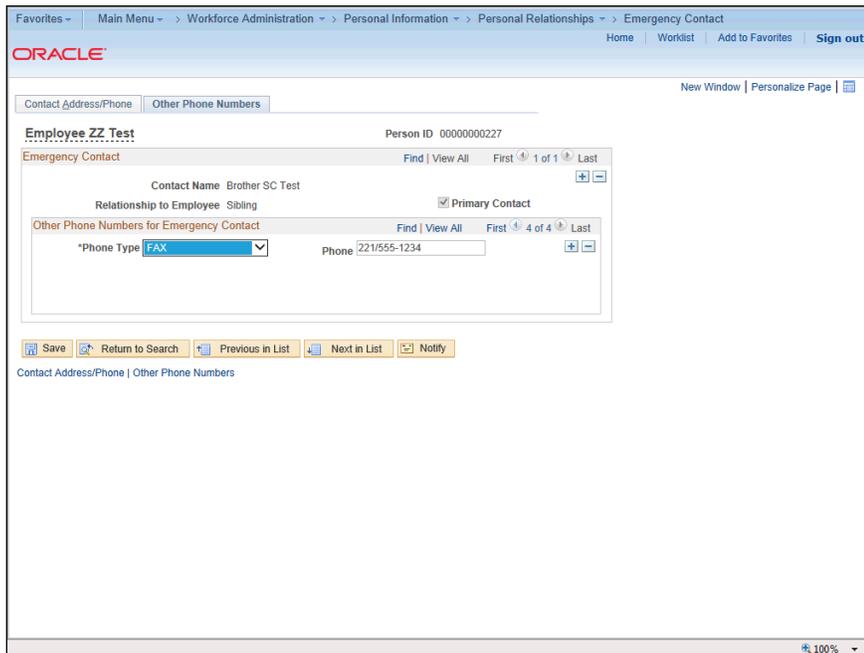
Step	Action
4.	Click the Personal Relationships menu. 
5.	Click the Emergency Contact menu item. 
6.	Enter " Test " into the Last Name field. Last Name: begins with ▼ <input type="text"/>
7.	Enter " Em " into the Name field. Name: begins with ▼ <input type="text"/>
8.	Click the Search button. 
9.	Click the Vertical Scrollbar to scroll down the page.
10.	Click the 0000000227 link. 
11.	A dashed underline indicates a mouseover popup page. In this example, the system will display more information about Employee ZZ Test if we move the cursor over this name.
12.	Point to the Employee ZZ Test link. 
13.	If Mouseover Popup Event is turned on, the system will display a popup window with additional information when you hover over a dash-underlined subject. The popup window disappears when you move the mouse.
14.	The Other Phone Numbers page (or tab) in the Emergency Contact component contains a grid area. Click the Other Phone Numbers tab. 

Step	Action
15.	<p>Sometimes, the system will show multiple rows of data for the same type of information. It allows you to enter more than one row of data at a time for the same column heading.</p> <p>Grids are similar to a spreadsheet, and will usually have column headings, rows, and fields. The fields are similar to cells in a spreadsheet.</p> <p>Fields within a grid may be edit boxes, drop-down list boxes, check boxes, and radio or prompt buttons.</p>
16.	<p>Rows of data in a grid always share the same high-level keys.</p> <p>For example, for the Other Phone Numbers page, you may have multiple rows for the different phone types. If you have multiple rows (and in this example, there are four such rows and three are in view), each of these rows has the same key fields: the Person ID is 0000000227, and the Contact Name is 'Brother SC Test.'</p> <p>If you insert (that is, add) a new row, the system will automatically copy the shared key data into this new row.</p>
17.	<p>Instead of using a scrollbar to scroll through rows of data in a grid, PeopleSoft uses navigation buttons and hyperlinks.</p> <p>Often, you will find these buttons and hyperlinks in the navigation header for each area.</p>
18.	<p>This is the navigation header for the Emergency Contact area.</p> <p>There is only one row of data. In other words, Employee ZZ Test has one Emergency Contact: Brother SC Test.</p>
19.	<p>This is the navigation header for the Other Phone Numbers for Emergency Contact area.</p> <p>Brother SC Test has four (4) rows of data, or 4 phone numbers. Only three (3) are visible right now.</p>
20.	<p>Insert Row and Delete Row buttons are used to add a new row or delete an existing row, respectively, in the appropriate area.</p>
21.	<p>For example, to add a new Emergency Contact (for example, Employee ZZ's husband Spouse AA), you would click on Insert Row in the Emergency Contact area.</p>
22.	<p>On the other hand, if you needed to add an additional phone number for Brother SC Test, you would click on any of the three Insert Row buttons in the Other Phone Numbers for Emergency Contact area.</p>

Step	Action
23.	<p>If your grid has more rows than can be seen on this first page, use the View All link to see all the rows of data.</p> <p>Click the View All link.</p> <p>View All</p>
24.	<p>To restore the original view, click on the View 3 link.</p> <p>Click the View 3 link.</p> <p>View 3</p>
25.	<p>Many times, there are significantly more rows of data than in this simple example. IF, for example, this grid had 285 rows of data, it would take a long time to scroll through all the rows.</p> <p>If you want to find an entry in any grid quickly, the Find link lets you search for a specific text string.</p> <p>Click the Find link.</p> <p>Find</p>



Step	Action
26.	Enter " Fax " into the field.
27.	Click the OK button. 
28.	The system finds your data quickly.



Step	Action
29.	There are other useful buttons and links in the Navigation Header for this grid. Click the Show previous row button (the left-facing triangle). 
30.	Click the Show next row button (the right-facing triangle). 
31.	The First link will show the first several rows of data, and will always include the first row. Click the First link. 

Step	Action
32.	Click the Last link. 
33.	The Last link will take you to the last several rows of data, and will always include the last row. (Notice that rows 2-4 of 4 are in view at this point.)
34.	Another type of data presentation is a tabbed grid . These grids provide a way to view multiple columns of information without using a horizontal scrollbar. In this example, you are looking at the Compensation page (or tab) in the Job Data component; see the breadcrumbs at the top of the screen for navigation.
35.	In the Pay Components area, you see a tabbed grid section. You are looking at the Amounts tab. This tab displays, among other things, *Rate Code , Comp Rate , and Frequency . Click on a different tab to view other columns of data. Click the Controls tab. 
36.	On the Controls tab, we still see *Rate Code , but we also see other data fields, such as Source and Calculated By .
37.	Click the Amounts tab. 
38.	Sometimes, the system "hides" data in an area. The data is there, it is just not being displayed. In this example, the Comparative Information section is currently collapsed. By clicking the right pointing arrow at the far left of the grid heading, you can expand an area that is hidden from view. Click the Expand section button. 
39.	The system displays the data by expanding the Comparative Information area; note that the arrow is now pointing down. You can collapse this area by clicking the down arrow at the far left of the grid heading. Click the Collapse section button. 

Step	Action
40.	<p>One final feature about grids: usually, the rows are sorted by the entries in the first column, from A to Z (or 0 - 9). The system uses the Column Headers as sorting tools, though.</p> <p>Click the Name column header.</p> <p>Name</p>
41.	<p>Now the data is sorted from A to Z by Name.</p> <p>Click the Last Name column header.</p> <p>Last Name</p>
42.	<p>You have sorted the data from A to Z by Last Name.</p> <p>Click the Business Unit column header.</p> <p>Business Unit</p>
43.	<p>Click the Empl ID column header.</p> <p>Empl ID</p>
44.	<p>Click the Empl ID column header a second time.</p> <p>Empl ID</p>
45.	<p>If a column is sorted A to Z, and you click the Column Header a second time, it reverses the sort. In this example, the larger Empl IDs are at the top.</p>
46.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Using the Find Feature of Your Browser

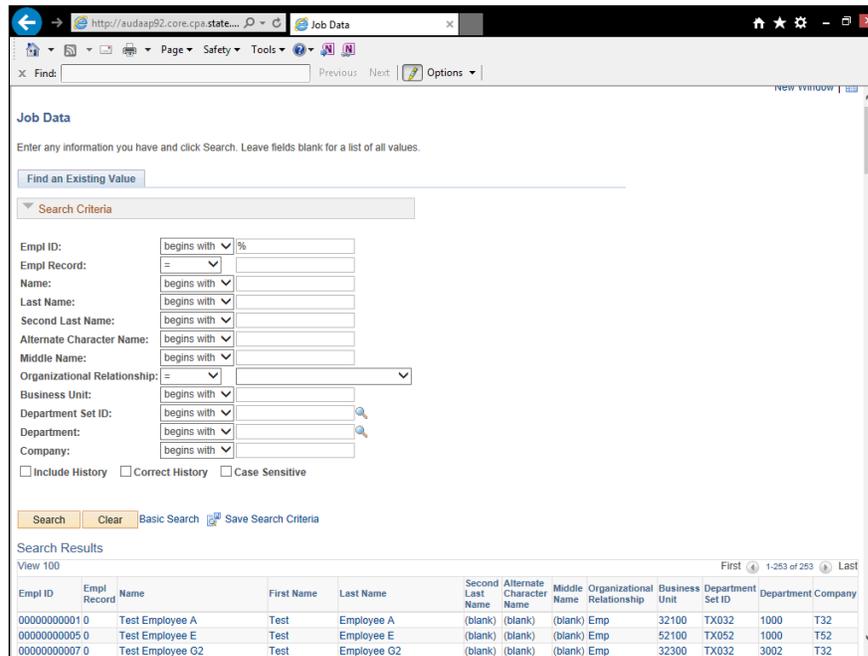
Section 4 - Exercises - Lesson 3: Using the Find Feature of Your Browser

Your browser has a **Find** feature, and it can help you search through rows of data.

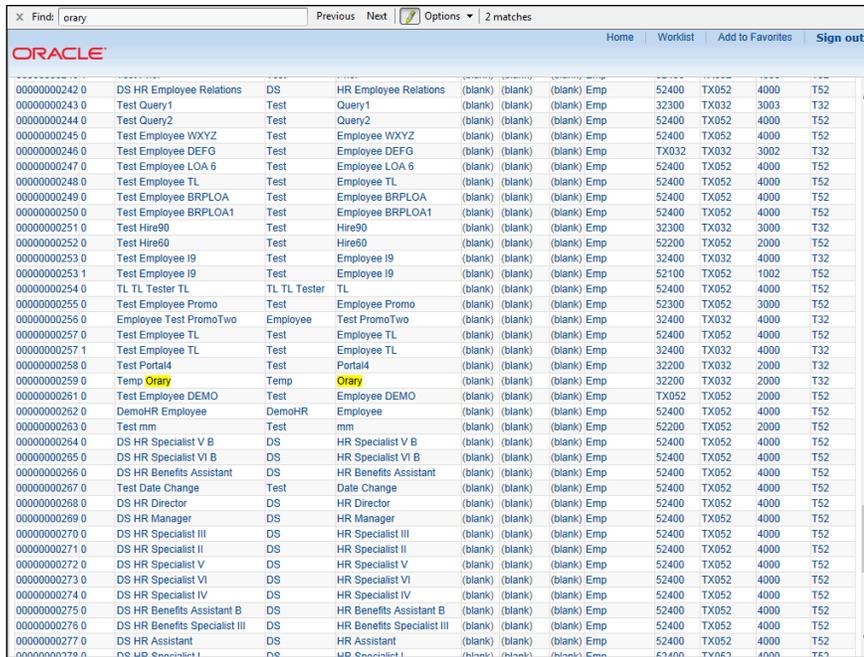
Procedure

This lesson introduces the Find feature of your browser.

Step	Action
1.	<p>Sometimes, there is so much data on the page that it might take some time to manually scroll through many lines of results.</p> <p>In this lesson, you will learn how to use your browser's built-in search feature to find a particular string of characters.</p>
2.	<p>In this example, there are 253 rows of data in the Search Results grid.</p> <p>You can locate a specific row quickly by using the Find feature built into your browser.</p> <p>In Internet Explorer, you would press [Ctrl+F] on your keyboard to open the Find function. In this lesson, you will see it at the top of the screen.</p> <p>NOTE: Not all browsers are the same, but in general, Ctrl+F will bring up a Find dialog box in a web browser. Supported Browsers: Internet Explorer Versions 8, 9, 10, and 11 are the supported browsers for the CAPPS website.</p>



Step	Action
3.	<p>Enter the text string for which you are searching in the Find: field.</p> <p><i>(Note: You also have options - in the Options dropdown to the right - to 'Match whole word only,' and to 'Match case' of the search string.)</i></p> <p>Enter "orary" into the Find field.</p>
4.	In this version of Internet Explorer, the browser dynamically highlights the string when it finds it.



The screenshot shows a search results page in the Oracle HR/Payroll system. The search criteria are 'Find: orary' and '2 matches'. The results table lists various employee records, with the entry for 'Temp Orary' highlighted in yellow. The table columns include employee ID, name, job title, and other details.

Employee ID	Name	Job Title	Other Info
00000000242 0	DS HR Employee Relations	DS HR Employee Relations	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000243 0	Test Query1	Test Query1	(blank) (blank) (blank) Emp 32300 TX032 3003 T32
00000000244 0	Test Query2	Test Query2	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000245 0	Test Employee WXYZ	Test Employee WXYZ	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000246 0	Test Employee DEFG	Test Employee DEFG	(blank) (blank) (blank) Emp TX032 TX032 3002 T32
00000000247 0	Test Employee LOA 6	Test Employee LOA 6	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000248 0	Test Employee TL	Test Employee TL	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000249 0	Test Employee BRPLOA	Test Employee BRPLOA	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000250 0	Test Employee BRPLOA1	Test Employee BRPLOA1	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000251 0	Test Hire90	Test Hire90	(blank) (blank) (blank) Emp 32300 TX032 3000 T32
00000000252 0	Test Hire60	Test Hire60	(blank) (blank) (blank) Emp 52200 TX052 2000 T52
00000000253 0	Test Employee I9	Test Employee I9	(blank) (blank) (blank) Emp 32400 TX032 4000 T32
00000000253 1	Test Employee I9	Test Employee I9	(blank) (blank) (blank) Emp 52100 TX052 1002 T52
00000000254 0	TL TL Tester TL	TL TL Tester TL	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000255 0	Test Employee Promo	Test Employee Promo	(blank) (blank) (blank) Emp 52300 TX052 3000 T52
00000000256 0	Employee Test PromoTwo	Employee Test PromoTwo	(blank) (blank) (blank) Emp 32400 TX032 4000 T32
00000000257 0	Test Employee TL	Test Employee TL	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000257 1	Test Employee TL	Test Employee TL	(blank) (blank) (blank) Emp 32400 TX032 4000 T32
00000000258 0	Test Portal4	Test Portal4	(blank) (blank) (blank) Emp 32200 TX032 2000 T32
00000000259 0	Temp Orary	Temp Orary	(blank) (blank) (blank) Emp 32200 TX032 2000 T32
00000000261 0	Test Employee DEMO	Test Employee DEMO	(blank) (blank) (blank) Emp TX052 TX052 2000 T52
00000000262 0	DemoHR Employee	DemoHR Employee	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000263 0	Test mm	Test mm	(blank) (blank) (blank) Emp 52200 TX052 2000 T52
00000000264 0	DS HR Specialist V B	DS HR Specialist V B	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000265 0	DS HR Specialist VI B	DS HR Specialist VI B	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000266 0	DS HR Benefits Assistant	DS HR Benefits Assistant	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000267 0	Test Date Change	Test Date Change	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000268 0	DS HR Director	DS HR Director	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000269 0	DS HR Manager	DS HR Manager	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000270 0	DS HR Specialist III	DS HR Specialist III	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000271 0	DS HR Specialist II	DS HR Specialist II	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000272 0	DS HR Specialist V	DS HR Specialist V	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000273 0	DS HR Specialist VI	DS HR Specialist VI	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000274 0	DS HR Specialist IV	DS HR Specialist IV	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000275 0	DS HR Benefits Assistant B	DS HR Benefits Assistant B	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000276 0	DS HR Benefits Specialist III	DS HR Benefits Specialist III	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000277 0	DS HR Assistant	DS HR Assistant	(blank) (blank) (blank) Emp 52400 TX052 4000 T52
00000000278 0	DS HR Specialist I	DS HR Specialist I	(blank) (blank) (blank) Emp 52400 TX052 4000 T52

Step	Action
5.	<p>To see Temp Orary's Job Data page, click any of the links on this line.</p> <p>Click the Temp Orary link.</p> <p>Temp Orary</p>
6.	The system displays the Job Data component (page) for employee Temp Orary .
7.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Section 5. Adding and Updating Data

Section 5 - Adding and Updating Data

The CAPPS HR/Payroll system manages your data and informational requirements using database tables. Sometimes, data will require periodic updates, while at other times new data must be added to the system. Adding new data might involve creating a new high-level key for the database table(s) involved in storing the new data.

The ability to manipulate existing data within CAPPS is crucial to keeping accurate records. One technique in keeping data accurate over time is to use effective-dated tables in combination with page action rules.

After completing this section, you will be able to:

- Describe the relationship between page actions and effective-dated rows
- Identify the categories or types of effective-dated rows
- Add a new high-level key to a database
- Add data using the Update/Display page action
- Change data using the Include History page action
- Change historical data using the Correct History page action

Understanding Action Types

Section 5 - Exercises - Lesson 1: Understanding Action Types

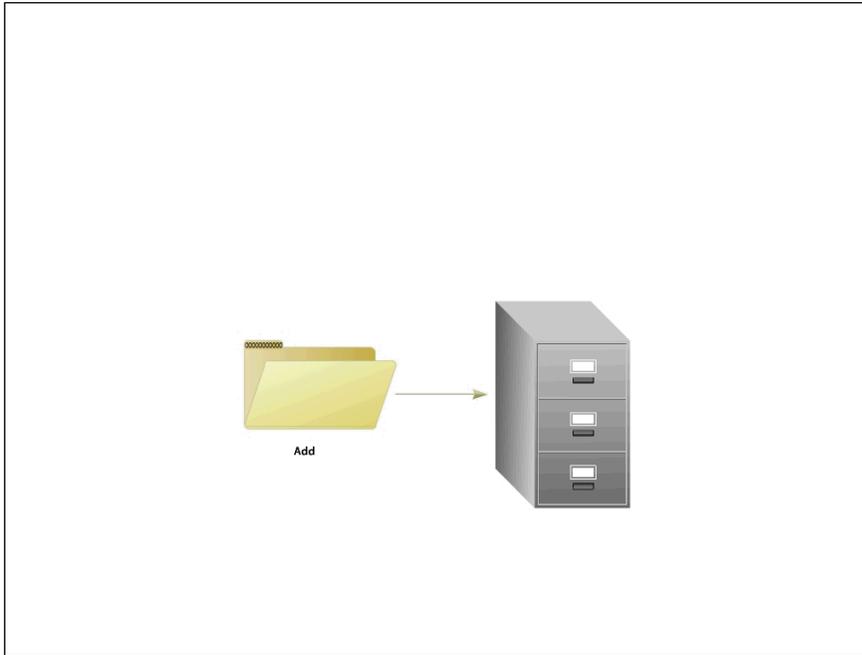
Using and manipulating data in CAPPS HR/Payroll involves **Action types**.

The four action types are:

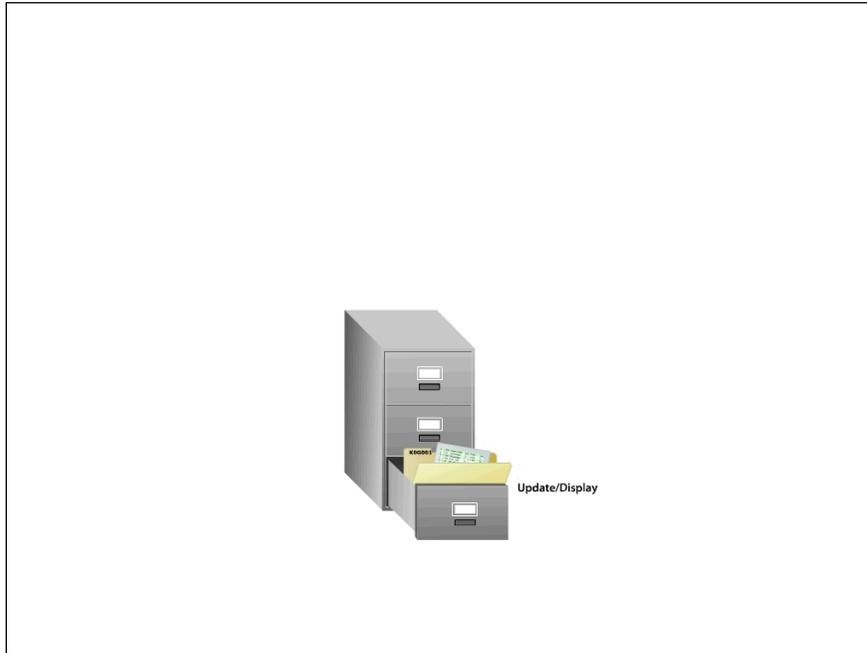
- Add
- Update / Display
- Include History
- Correct History

Procedure

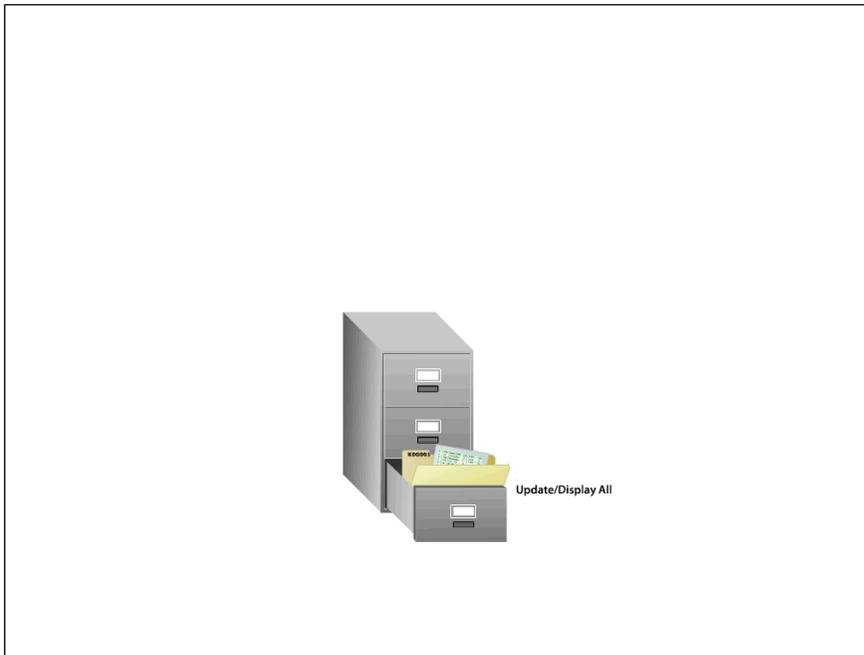
This lesson introduces the four types of action pages in CAPPS HR/Payroll.



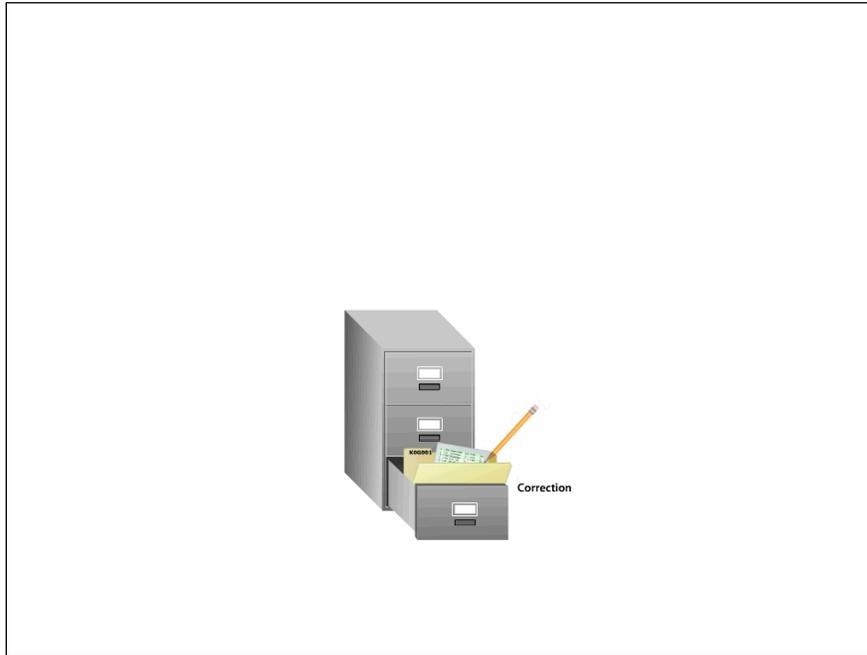
Step	Action
1.	<p>The CAPPS HR/Payroll system is like a file cabinet. The file cabinet is filled with information organized by folders. When you use the Add action type, you are creating a new folder.</p> <p>Your agency has just hired Susan Jones, and her new Employee ID (Empl ID) is 0000000000. Her Empl ID will become a new high-level key in the system. Empl ID is used to differentiate Susan Jones from Anthony Jones (Empl ID 00000000312), who is also employed with the agency.</p>



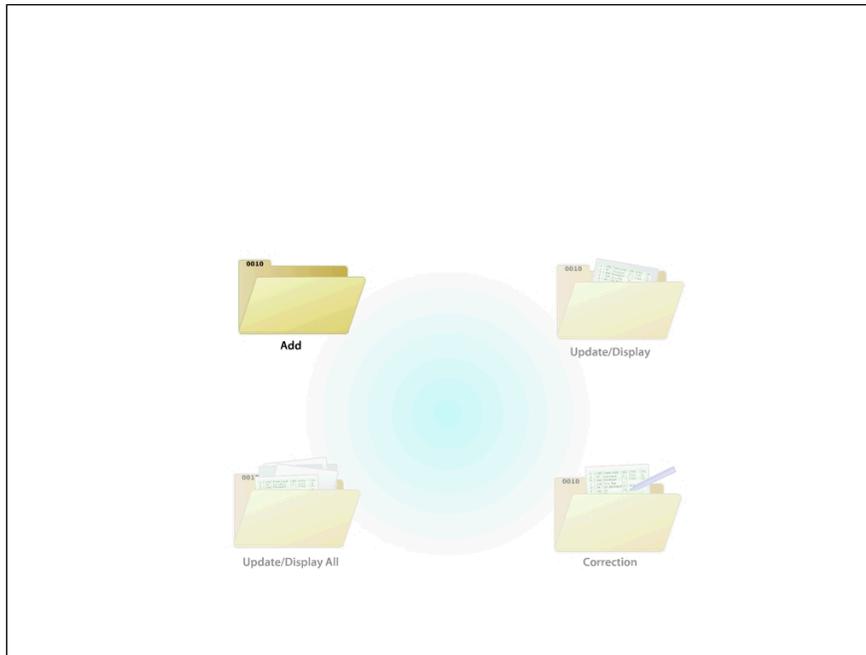
Step	Action
2.	<p>A few days later, you need to update Susan's record with additional information.</p> <p>When you access her file, you would use an action type of Update/Display.</p> <p>Update/Display lets you make updates to existing data by adding a new current row, and will display the current effective-dated row, along with any future-dated rows.</p>



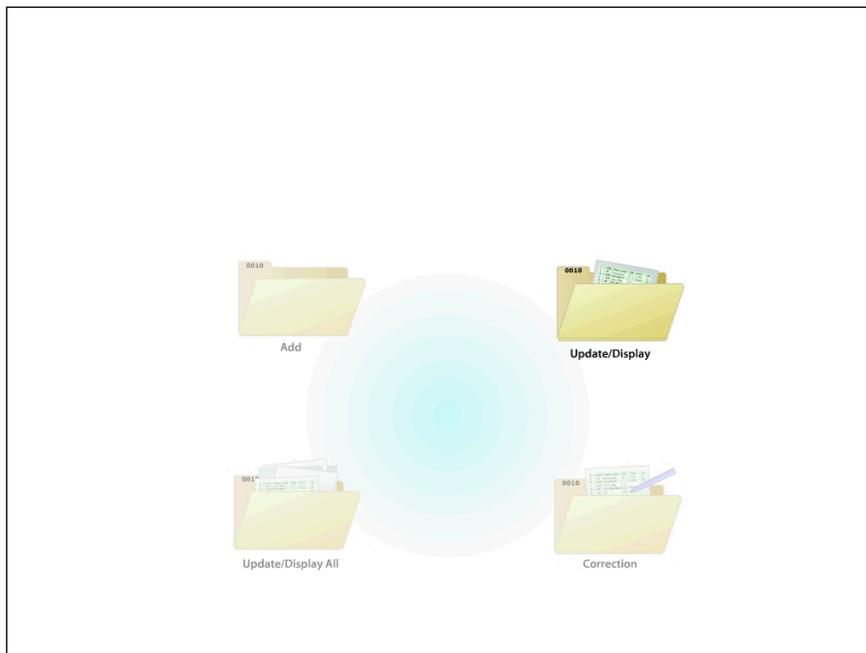
Step	Action
3.	<p>Three years have gone by since Susan was hired. In that time, she has changed jobs, moved twice, and gotten married.</p> <p>The action type Update/Display All will let you retrieve (view) previously entered (historical) data, in addition to current and future rows.</p>



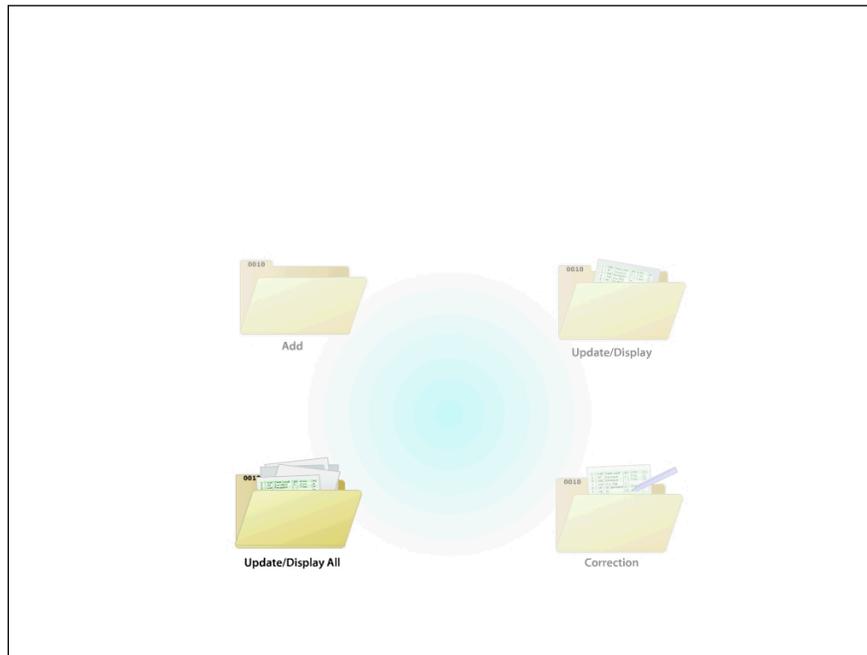
Step	Action
4.	<p>Your agency discovered that an error was made in her records when Susan transferred departments. You can use the action type Correction to make adjustments to errors in the database.</p> <p>The Correction action type is a powerful tool, and not all users will have access to it. No history tracking is saved.</p>



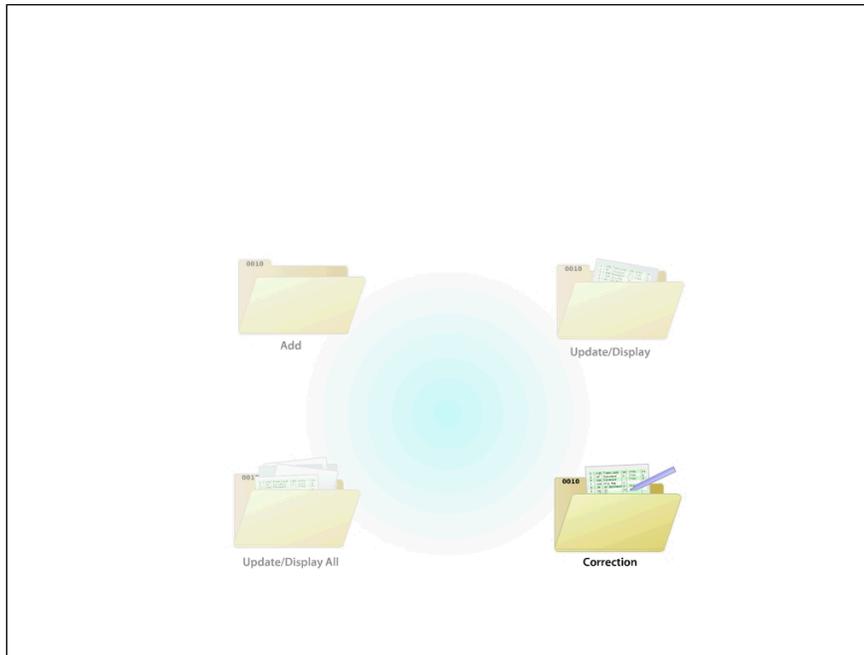
Step	Action
5.	<p>You use four action types to work with CAPPS data.</p> <p>Use Add when a new high-level key is required to complete a transaction.</p>



Step	Action
6.	<p>Use Update/Display when retrieving or updating data on any non-effective-dated database tables.</p> <p>If the table is effective-dated, you can use the Update/Display action to:</p> <ul style="list-style-type: none"> * view current and future rows, * modify future rows only, * insert a new current row, or * insert a future row.



Step	Action
7.	<p>When you view data using Update/Display All, you can view current, future, and history rows of data.</p> <p>If the table is effective-dated, you can use the Update/Display All action to:</p> <ul style="list-style-type: none"> * view current, future, and history rows, * modify future rows only, * insert a new current row, or * insert a future row.



Step	Action
8.	<p>Correction is the most powerful of all the actions. Use it to view, change, or insert rows of data, regardless of the effective date.</p> <p>Only a limited number of users will have security access to this action type, because it is so powerful, and because it does not leave an audit trail.</p>
9.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Categories of Effective-Dated Rows

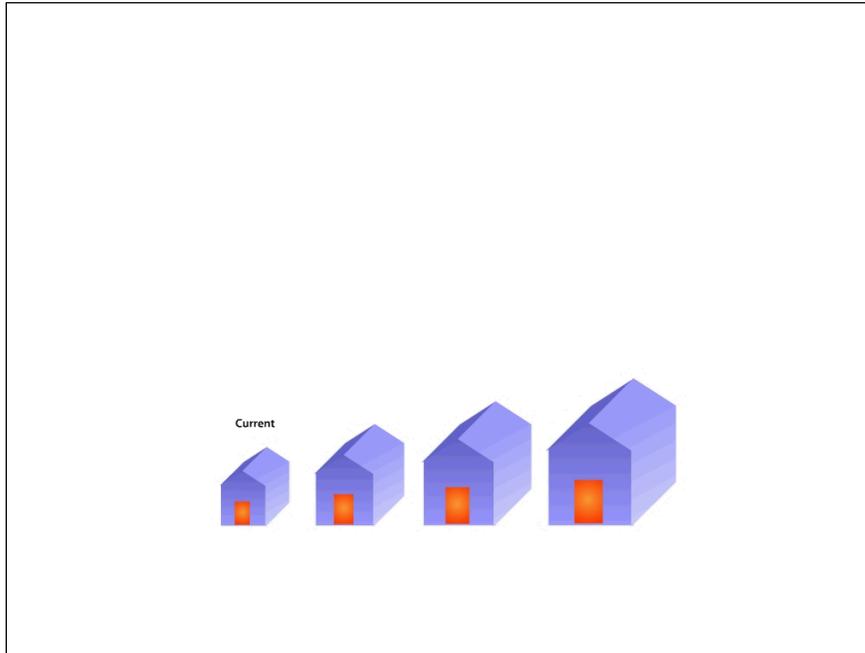
Section 5 - Exercises - Lesson 2: Categories of Effective-Dated Rows

CAPPS uses **effective-dated** rows to retain historical data, view data changes over time, and store future data. Three categories of effective-dated rows are used to accomplish this task:

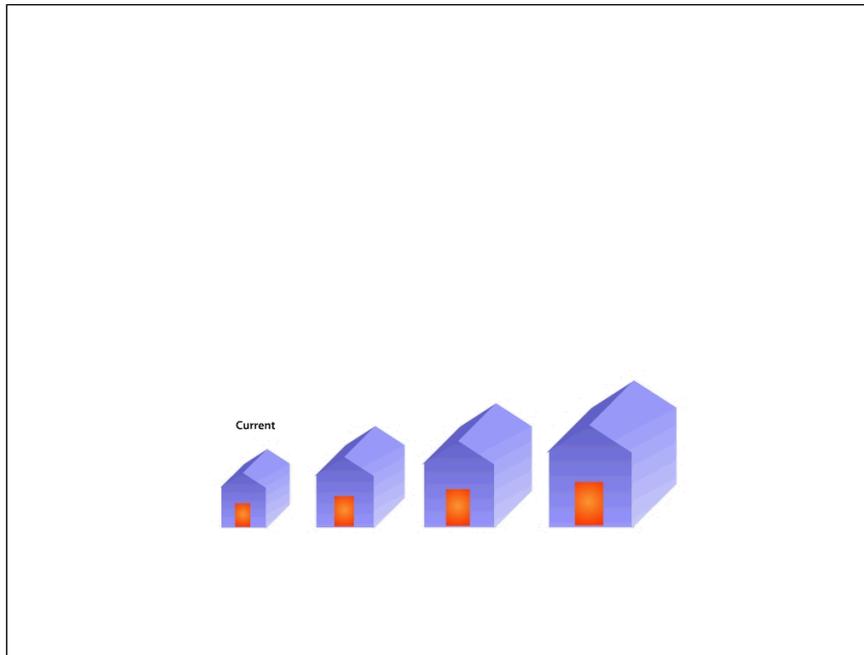
- Current
- History
- Future

Procedure

This lesson introduces the concept of effective-dated rows in CAPPS HR/Payroll.



Step	Action
1.	<p>The rationale behind effective-dating is to maintain an accurate history of information in a database over time. Effective-dating allows you to store historical data, see changes in your data, and enter future data.</p> <p>For example, you may track several events in Tom Sawyer's career: his hire date, a transfer to another department, and a promotion or pay rate change. Each of these events can be recorded by inserting an effective-dated row into the database. The events are stored by Employee ID, by date. In this way, you have a more complete job history for Mr. Sawyer.</p>



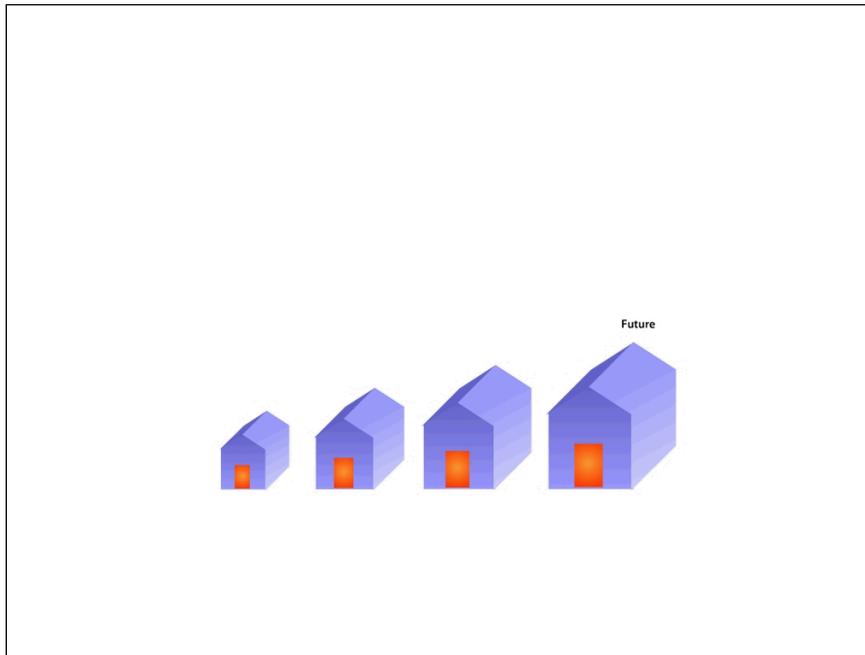
Step	Action
2.	<p>When you enter new information that is related to existing data (in this example about an employee), you do not want to overwrite or change the data already in the system. In order to retain history, add a new data row identified by the date when the new information goes into effect: the <i>effective date</i>.</p> <p>The CAPPS HR/Payroll system classifies effective-dated rows into three basic types: Current, History, and Future.</p>



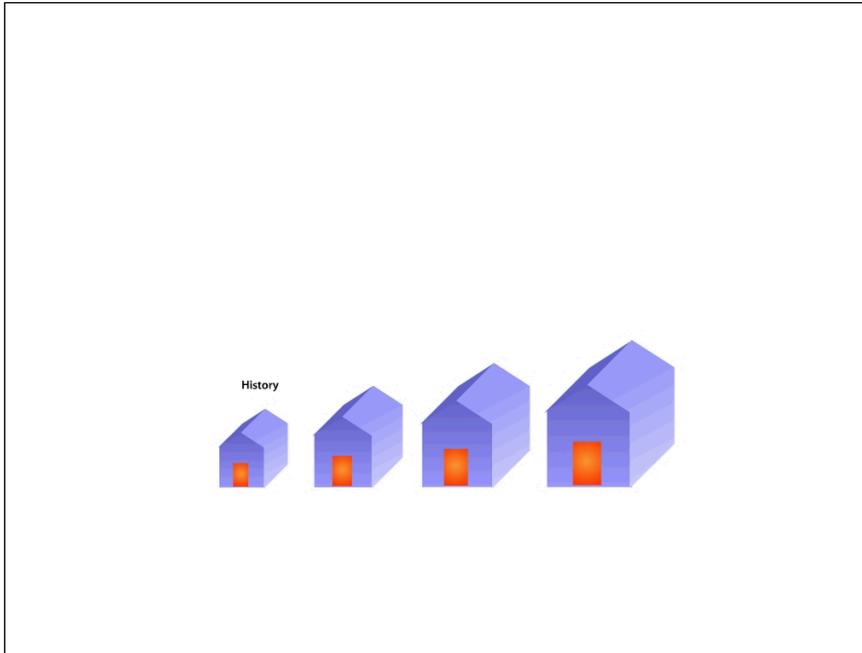
Step	Action
3.	<p>Current: The row with the effective date closest to - but not greater than - the system date (today). <i>Only one row can be the current row.</i></p> <p>History: Row(s) with an effective date earlier than the current data row.</p> <p>Future: Row(s) with an effective date after (later than) the system date.</p> <p>A <i>current</i> row of CAPPS data displays the most up-to-date information available, or what is currently affecting a data change.</p>



Step	Action
4.	<p>John Smith and his bride married on May 12, 2007.</p> <p>Human Resources inserted a new data row in his record, showing a change of status from Single to Married, effective May 12, 2007.</p> <p>If you were to look at Mr. Smith's record today (sometime in 2015), the current row would be effective-dated May 12, 2007. Unless Mr. Smith has a status change in the future, then May 12, 2007 will remain his current data row.</p>



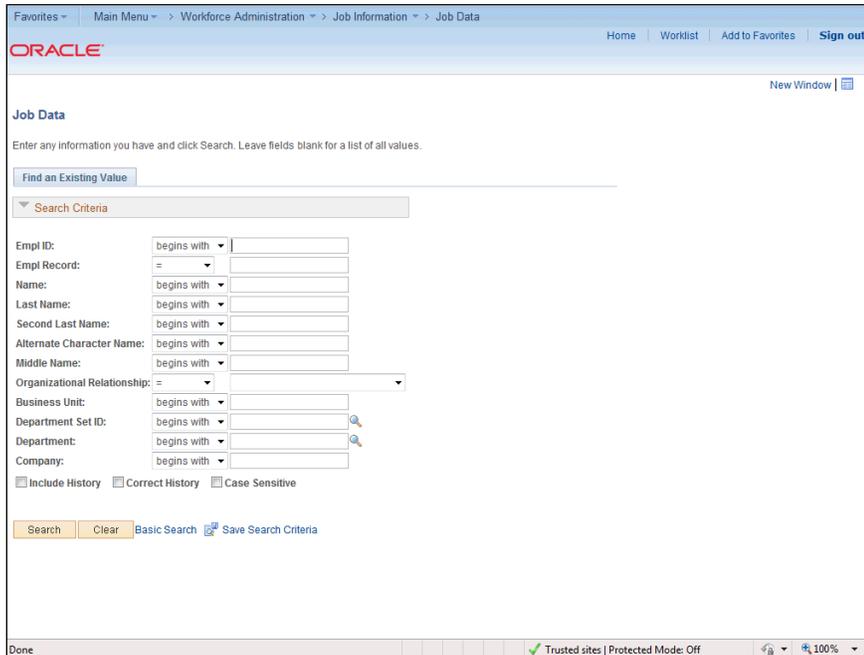
Step	Action
5.	<p>Future rows of data have not yet taken effect. They are future transactions.</p> <p>If Mr. Smith tells Human Resources that he and his wife will be moving to a new address, effective September 30, 2015, then HR could insert a row changing his address, with an effective date of September 30, 2015. Until the effective date gets here, this row would remain in the system as a future data row.</p> <p>On September 30, 2015, the new address would become the current row, and the previous address would become a History row.</p>

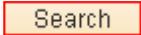


Step	Action
6.	<p>Eventually, current and future rows will become history rows.</p> <p>For example, when Mr. Smith changed his address, a row was inserted to his address field, with an appropriate effective date. The previous address, which had been the current row, would then become a history row.</p> <p>History rows let you maintain an accurate online history of your data. This data can then be used in reports or viewed online.</p> <p>NOTE: <i>Not all tables are effective-dated tables.</i></p>

Page Action Symbol	Action Type	Rows to Retrieve	Rows to Insert	Rows to Update
 Add	Add	n/a	New high-level key	n/a
 Update/Display	Update / Display	Current, Future	New EFFDT > Current Row EFFDT	Future only
 Include History	Update / Display All	History, Current, Future	New EFFDT > Current Row EFFDT	Future only
 Correct History	Correction	History, Current, Future	Any EFFDT	All rows

Step	Action
7.	<p>Action types determine the row(s) of an effective-dated table that can be retrieved and/or changed. The table below displays Page Action Symbols, Action Types associated with the Symbol, and the types of effective-dated rows which can be retrieved, inserted, or updated.</p> <p>For example, on an Update / Display page, you can retrieve the current row (as well as any future row(s) which might also exist), and you can insert a new effective date row on this page, too.</p> <p><i>Note: When you retrieve a row, you are only viewing it. Typically, you can never change or update a view-only row.</i></p>
8.	<p>Now let's view some effective-dated rows in CAPPS. You are looking at the Job Data Search Criteria page.</p> <p>Because the Include History and Correct History checkboxes appear on this page, the system is telling you that you are searching for effective-dated data.</p> <p>If these two checkboxes are not displayed, then you are dealing with a table of data that is not effective-dated.</p>
9.	<p>In order to view historical data, you would click the Include History checkbox on this page, or you could click the Include History button on the job data page.</p>



Step	Action
10.	Enter 0000000001 into the Empl ID field. 
11.	Click the Search button. 
12.	The system displays the Work Location page of the Job Data component. There is only 1 row of data in the Work Location section: it is the current row of data, with an effective date of 5/1/2014.
13.	The action recorded was a Pay Rate Change .
14.	Click the Vertical Scrollbar to scroll down the page.
15.	Click the Include History button to see if there are any records prior to 05/01/2014 for this employee. 
16.	The system updates the numbers of rows from 1 to 4. The current row, effective 05/01/2014, is still displayed since it is the most recent of 4 records.
17.	Click the Show next row button. 

Step	Action
18.	<p>The system displays row 2 of 4 records. The Action was a Data Change with Reason Code F14, effective on 09/01/2013.</p> <p>Click the Show next row button.</p> 
19.	<p>The system displays record 3 of 4. The action was a Data Change with Reason Code 038, effective on 06/01/2013.</p> <p>Click the Show next row button.</p> 
20.	<p>The system displays the last of 4 records. The action was a Hire with Reason Code 010, effective on 02/01/2013.</p> <p>The fourth record is the oldest data.</p>
21.	<p>Congratulations! You have successfully completed this lesson. End of Procedure.</p>

Adding a New High-Level Key

Section 5 - Exercises - Lesson 3: Adding a New High-Level Key

Consider all the data that is entered into the CAPPS system over time. To access the correct data most efficiently, CAPPS uses database tables to categorize the information. To uniquely identify each row of data in the table(s), a **high-level key** is defined.

Procedure

This lesson introduces the concept of adding a new high-level key in CAPPS HR/Payroll.

Employee Information				
Emp ID	Hire Date	Dept	Location	...
0000000000	01/01/2014	9999	Austin	...
1111111111	02/02/2014	8888	Dallas	...
2222222222	03/03/2014	7777	San Antonio	...
3333333333	04/04/2014	6666	Houston	...
:	:	:	:	...

Key Field

Step	Action
1.	<p>The CAPPS HR/Payroll system uses indexes, or keys, to find data in the database the same way that you use an index to find specific information in a book.</p> <p>If an index exists for a specific field in a table, the system can search and quickly find what it needs in order to complete your request.</p> <p>A high-level key is a unique piece of data specific to only one record in the database.</p>

Employee Information				
Emp ID	Hire Date	Dept	Location	...
0000000000	01/01/2014	9999	Austin	...
1111111111	02/02/2014	8888	Dallas	...
2222222222	03/03/2014	7777	San Antonio	...
3333333333	04/04/2014	6000	Houston	...
:	:	:	:	...

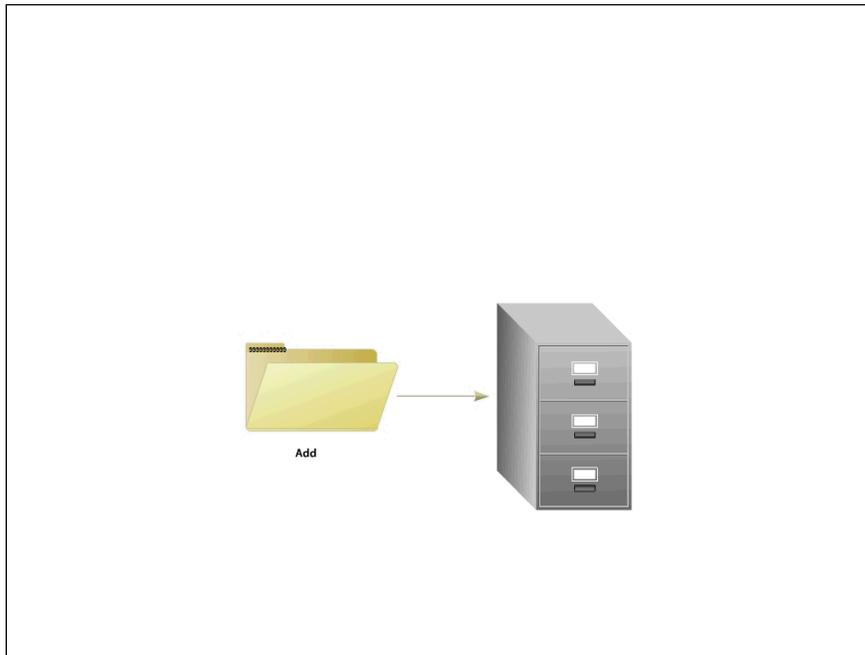
Key Field

Step	Action
2.	<p>For example, an Employee ID (Empl ID) is unique to one employee. Two or more employees may have the same last name, or may have been hired on the same day, or may work in the same Department, but each will have his or her own Empl ID.</p> <p>The key field for data in the Employee Information table below is Empl ID.</p> <p>A search for the key field 0000000000 shows that this employee's Hire Date is 01/01/2014, and her Department is 9999, and her Location is Austin.</p>

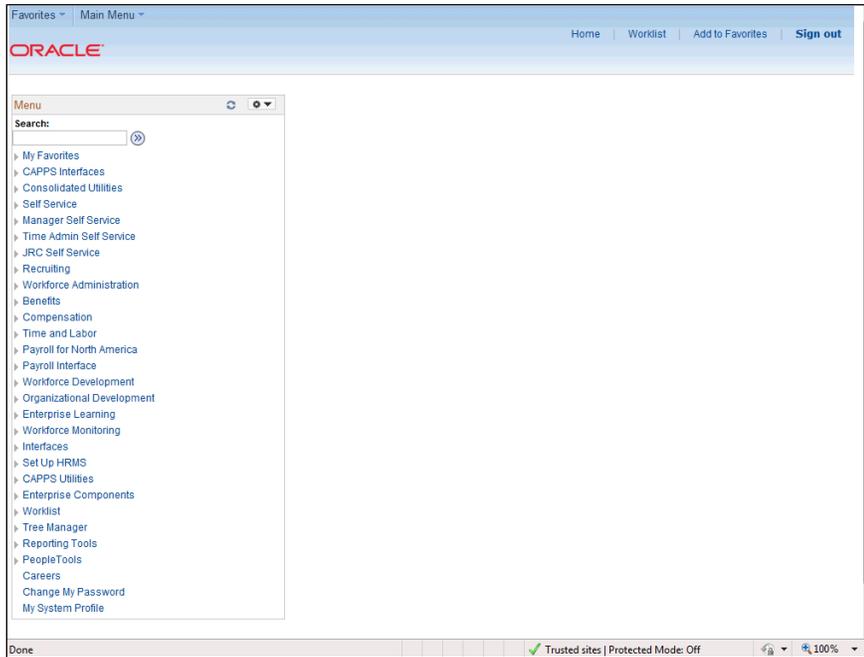
Employee Contact Information				
Emp ID	Contact Name	Relationship	Phone	...
0000000000	Smith, Jane	spouse	555-789-9823	...
1111111111	Agnew, Amanda	spouse	555-946-8722	...
1111111111	Avery, Brian	brother	555-822-4544	...
1111111111	Smythe, Harris	father	555-987-9898	...
1111111111	Penrose, Lynda	mother	555-987-9898	...
1111111111	Jones, Sean	brother	555-232-4545	...
2222222222	Faulkner, Jon	spouse	555-651-9503	...
:	:	:	:	:

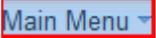
Key Field Key Field
 Multi-part Key

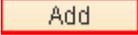
Step	Action
3.	<p>Sometimes, though, using just one key to identify a row of data is not appropriate. In those circumstances, CAPPS allows a multi-part key.</p> <p>In the table below, there are five separate rows of data for Employee 1111111111, because he has five different contacts.</p>
4.	<p>Using Empl ID as the sole key, there is no difference between Amanda Agnew, Brian Avery, Harris Smythe, Lynda Penrose, or Sean Jones. If you queried the database by Empl ID alone, you would receive all five data rows in your results.</p> <p>You can use a multi-part key for these types of queries to get specific results.</p> <p>Searching on the multi-part key Empl ID and Contact Name, you will receive the specific information you need.</p>

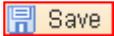


Step	Action
5.	<p>Your agency has entered all current employees into the CAPPS HR/Payroll system. This allows updates to personal information and employee status changes. Each employee in the system has a unique Empl ID.</p> <p>To enter a new high-level key into the database, you use the Add action type. When a new employee is hired by the organization, you add the employee to the system, and the system creates a new high-level key. This key becomes the unique identifier, or Empl ID, and is used to access this employee's record.</p>



Step	Action
6.	<p>You will add a new high-level key to the system.</p> <p>Your agency has created a new department called TESTDEPT2. You will add the Department ID and corresponding department information to the system.</p> <p>Click the Main Menu button to navigate to the Department page.</p> <p></p>
7.	<p>Click the Set Up HRMS menu.</p> <p></p>
8.	<p>Click the Foundation Tables menu.</p> <p></p>
9.	<p>Click the Organization menu.</p> <p></p>
10.	<p>Click the Departments menu item.</p> <p></p>

Step	Action
11.	<p>The system opens the Departments page on the Find an Existing Value tab.</p> <p>Because you are adding a new department, click the Add a New Value tab.</p> 
12.	<p>The system typically defaults in a value for SetID (TX032), based on your security and your job role.</p> <p>Enter TESTDEPT2 into the Department field.</p> <p>(This will be the new high-level key; Department ID is the key field in this database.)</p> <p>Department: <input data-bbox="581 779 743 814" type="text"/></p>
13.	<p>Click the Add button.</p> 
14.	<p>The system opens up the Departments component, on the Department Profile tab.</p> <p>You are in Add mode, and the key fields (SetID = TX032, and Department = TESTDEPT2) are displayed in view (or read-only) mode near the top of the page.</p>
15.	<p>CAPPS will usually default the system date into an Effective Date field. You can change this date, if appropriate.</p> <p>In a date field, you can accept the default date, enter 't' or 'today' for today's date, enter the date directly (using the format <i>mmdyyy</i>), or click on the Choose a date button (the Calendar icon) to select a date.</p>
16.	<p>The default Status is Active when adding a Department.</p>
17.	<p>The asterisk (*) in front of the Description field means that this is a required field. If you leave a required field empty, you will not be able to save the data on this page.</p> <p>Enter "TESTDEPT2" into the Description field.</p> <p>*Description: <input data-bbox="760 1524 1190 1560" type="text"/></p>
18.	<p>Click the Look up Company button (the magnifying glass icon) to show a list of valid agencies to which this department can belong.</p> <p>(In the CAPPS HR/Payroll system, Company is another label for Agency.)</p> 
19.	<p>Click the T32 Texas Baseline Agency 032 link.</p> <p>Texas Baseline Agency 032</p>

Step	Action
20.	<p>Click the EE04 Function dropdown list to show a list of valid values.</p> <p>The EE04 Function (Equal Employment Opportunity 04 Function) value is the functional category for this department, and is used for reporting to the U.S. Federal Government.</p> <p>'EE04 Function: <input type="text" value=""/></p>
21.	<p>Click the Financ Adm list item.</p> <p>Financ Adm</p>
22.	<p>You have entered sufficient information for this new department.</p> <p>Click the Save button.</p> <p></p>
23.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Using Update/Display

Section 5 - Exercises - Lesson 4: Using Update/Display

The **Update/Display** action type, or page, lets you access current and future effective-dated rows in the database. Specifically, you can:

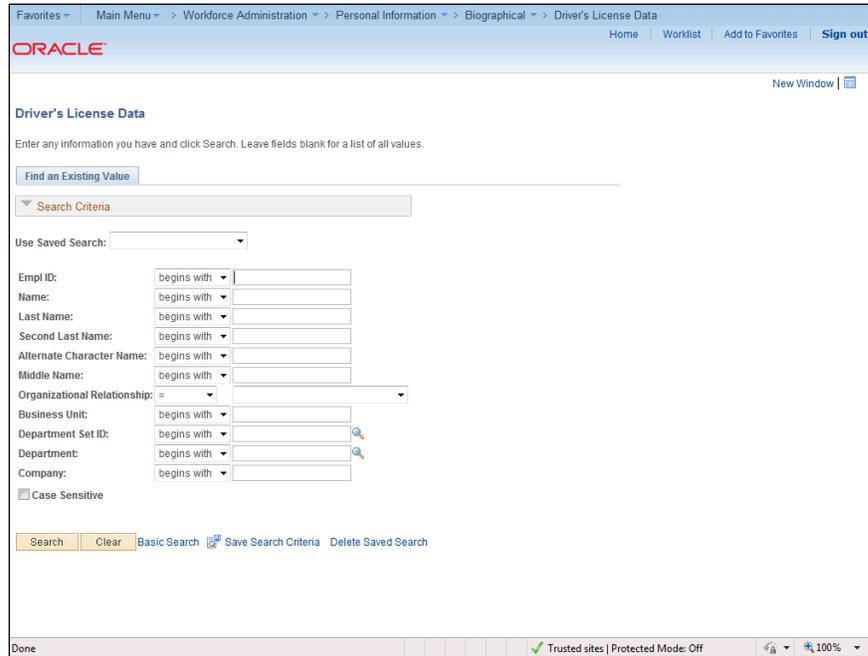
- Insert, change, and delete future rows of data
- View current and future rows of data

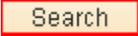
This is also the action type you use to access tables that are not effective-dated.

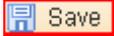
Procedure

This lesson introduces the concept of using **Update/Display mode** in CAPPS HR/Payroll.

Step	Action
1.	<p>In this lesson, you will use Update/Display to retrieve an employee record and add driver's license information.</p> <p>You will notice that the checkboxes for Include History and Correct History are not part of this page. This means that the data is not effective-dated.</p> <p>When using pages that are not effective-dated, the default page action is Update/Display.</p>



Step	Action
2.	Enter 0000000218 into the Empl ID field. 
3.	Click the Search button. 
4.	The system displays the Driver's License Data page. Enter 999999999 into the Driver's License Nbr field. 
5.	Click the Look up State button to display a list of valid values. 
6.	Click the Alaska link. 
7.	Enter 08222012 into the Valid from field. 
8.	Enter 08222019 into the Valid To field. 

Step	Action
9.	Click the Look up License Type button. 
10.	Click the Class C link. Class C
11.	Click the Save button. 
12.	The driver's license information is saved; there is only one driver's license record for this employee (1 of 1). If you need to add an additional driver's license number (perhaps when the employee gets a Texas driver's license to replace his Alaskan one), click on the + (plus) sign to add a new row of data.
13.	Congratulations! You have successfully completed this lesson. End of Procedure.

Using Include History

Section 5 - Exercises - Lesson 5: Using Include History

CAPPS' effective-dating logic enables you to maintain an accurate history of information in the database. Effective-dating allows you to store historical data and track changes over time.

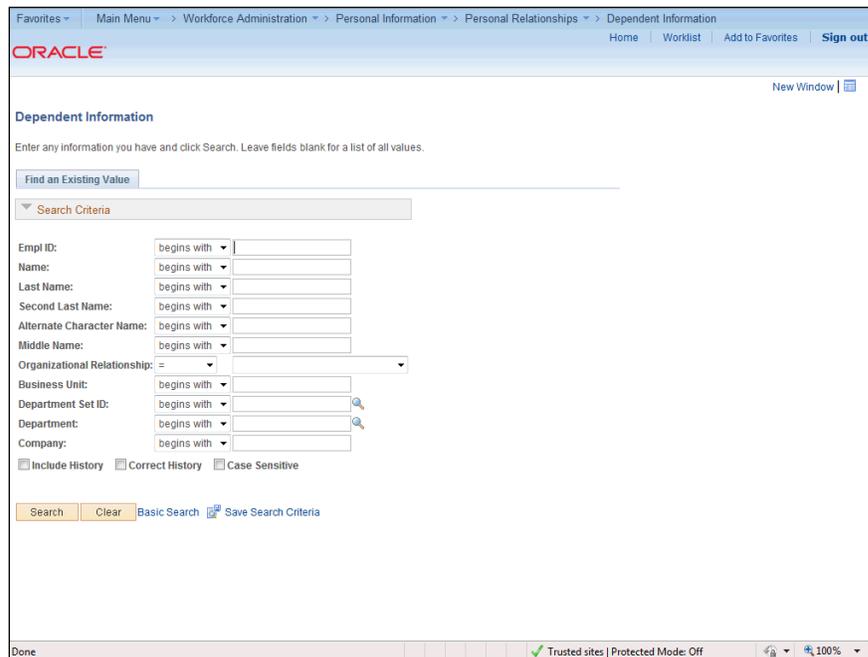
The **Update/Display All** action type is used primarily for **viewing** data within an effective-dated table. You do, however, have the option of using this action type to update certain categories of existing data in the database by selecting the **Include History** page action. This allows you to:

- View history, current, and future rows of data
- Change future rows
- Insert future rows
- Delete future rows

Procedure

This lesson demonstrates the use of **Include History**.

Step	Action
1.	<p>In this lesson, you will use Update History to update current name information for a dependent and also enter a future effective-dated name change due to an upcoming marriage.</p> <p>We have already navigated to the Dependent Information page; notice the breadcrumbs at the top of the page.</p> <p>NOTE: This particular functionality may not be available to all users, because of security restrictions and configuration settings. Please be aware that the lesson is showing you the Include History feature, and is NOT a lesson in how to change Names.</p>
2.	<p>The system displays the Dependent Information Search Criteria page.</p> <p>Notice that the page displays checkbox options for Include History and Correct History.</p> <p>This means that the data you will look at is effective-dated.</p>



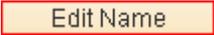
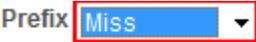
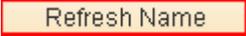
Step	Action
3.	<p>Enter 0000000218 into the Empl ID field.</p> <p>Empl ID: <input type="text" value="begins with"/> <input style="border: 2px solid red;" type="text"/></p>

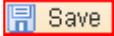
CAPPS HR/PAYROLL

EUT Course



Step	Action
4.	<p>You want to look at all historical, current, and future rows of data. In addition, you may want to update current or future data.</p> <p>Click the Include History checkbox option.</p> <p><input type="checkbox"/> Include History</p>
5.	<p>Click the Search button.</p> <p><input type="button" value="Search"/></p>
6.	<p>The system displays the Name page for employee Test Hire8.</p> <p>In the Dependent /Beneficiaries section, there is only one beneficiary (1 of 1).</p>
7.	<p>In the Name History section, the system defaulted in the Effective Date from the system date. You can change this date if appropriate.</p> <p>Click the Edit Name button to enter a name for this beneficiary.</p> <p><input type="button" value="Edit Name"/></p>
8.	<p>Click the Prefix dropdown list.</p> <p>Prefix <input type="text" value=""/></p>
9.	<p>Click the Miss list item.</p> <p>Miss</p>
10.	<p>Enter Jane into the First Name field.</p> <p>First Name <input type="text" value=""/></p>
11.	<p>Enter Doe into the Last Name field.</p> <p>Last Name <input type="text" value=""/></p>
12.	<p>The Display Name, Formal Name and Name are blank at this point.</p> <p>Click the Refresh Name button.</p> <p><input type="button" value="Refresh Name"/></p>
13.	<p>The system now populates Miss Doe's name data in the Display Name, Formal Name, and Name fields.</p> <p>Click the OK button. (The OK button acts like a Save button.)</p> <p><input type="button" value="OK"/></p>

Step	Action
14.	<p>As of 08/29/14, Jane's name is Jane Doe. In the Name History section, she has only one record (1 of 1).</p> <p>Now add a record for her name change when she gets married next year.</p> <p>Click the Add a new row button.</p> 
15.	<p>In Date fields, you can accept the default current date, or enter 't' for today's date, or enter the date using the format <i>mmdyyy</i> (no punctuation), or click on the Choose a date button (the calendar icon) to select a date.</p> <p>Enter Jane's wedding date of August 29, 2015.</p> <p>Enter 08292015 into the Effective Date field.</p> 
16.	<p>Click the Edit Name button to enter Jane's married name as of 8/29/2015.</p> 
17.	<p>Click the Prefix dropdown list.</p> 
18.	<p>Click the Mrs list item.</p> 
19.	<p>Enter Married-Doe into the Last Name field.</p> 
20.	<p>The names in the red box are still Jane's single name.</p> <p>Click the Refresh Name button.</p> 
21.	<p>The names in the red box now show what Jane's married name will be as of 08/29/2015.</p> <p>Click the OK button.</p> 

Step	Action
22.	<p>There are two records (1 of 2) in the Name History section, because you added Jane's future married name.</p> <p>The first record (1 of 2) is displayed. This is the future name (Jane Married-Doe), effective on 08/29/2015.</p> <p>Click the Show next row button to display the second record.</p> 
23.	<p>The system shows the second record (2 of 2).</p> <p>This is the current record (effective dated 08/29/2014), showing Jane's single name of Jane Doe.</p> <p>Click the First link (or the left-facing arrow) to return to the first record.</p> <p>First</p>
24.	<p>The future name change is displayed; it will take effect on 08/29/2015.</p> <p>Click the Save button.</p> 
25.	<p>Click the Return to Search button.</p> 
26.	<p>To confirm that your changes were saved to the CAPPS database, click the 0000000218 link.</p> <p>0000000218</p>
27.	<p>The system displays the first of 2 records (1 of 2) in the Name History section.</p> <p>This is the future name change row, effective on 08/29/2015.</p> <p>Click the Show next row button to display the second record.</p> 
28.	<p>Record 2 of 2 displays Jane's single name effective from 08/29/2014 until 8/28/2015.</p>
29.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Using Correct History

Section 5 - Exercises - Lesson 6: Using Correct History

The purpose of the **Correction** action type is to correct mistakes in the system. The **Correction** action type can be very effective if it is used appropriately. Likewise, if abused, it can be detrimental to CAPPS data integrity since no audit trail remains. By selecting its associated page action, **Correct History**, you are able to:

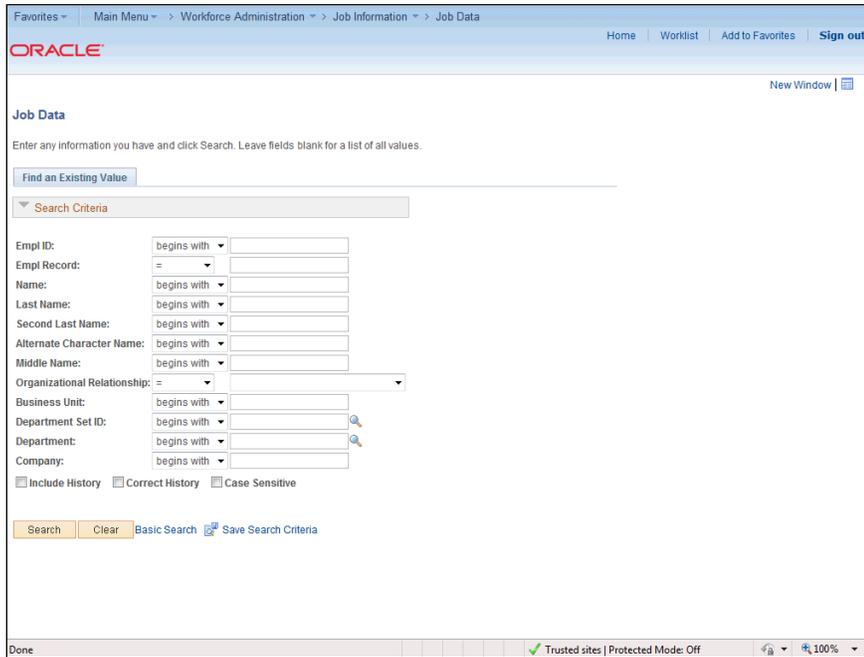
- View history, current, and future rows
- Change history, current, and future rows
- Insert history, current, and future rows

Correct History is not available to all users. Typically, implementation team members and other Super Users are the only people with access to this action type.

Procedure

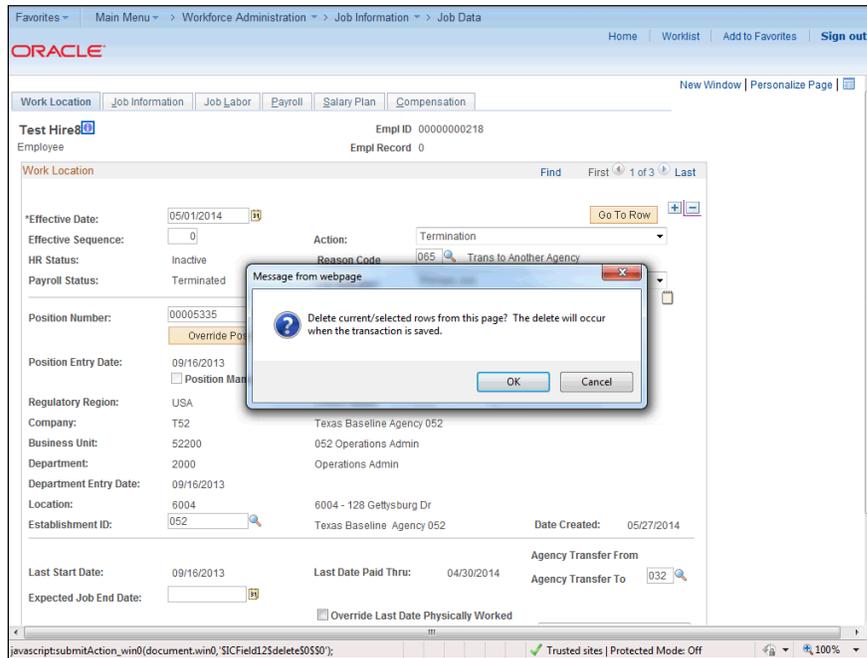
This lesson shows how to use **Correct History**.

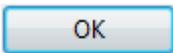
Step	Action
1.	<p>An employee was incorrectly terminated in the database.</p> <p>In this lesson, you are being asked to correct this error by deleting the incorrect termination record from the database using Correct History.</p> <p>NOTE: This particular functionality may not be available to all users, because of security restrictions and configuration settings. Please be aware that the lesson is showing you the Correct History feature.</p>
2.	<p>The types of actions that you can perform on rows of data depend on the data row type. When you retrieve, modify, or insert rows in a table, the Correct History action applies specific rules based on the effective date.</p> <p>Correct History retrieves all rows (Current, Future, and History) and lets you change or correct any row, as well as insert new rows, regardless of the effective date or sequence number.</p> <p>This option will only be available to a limited number of users, based on security settings and job roles in the system, because it changes historical data, and does not leave an audit trail.</p>



Step	Action
3.	<p>We have already navigated to the Job Data page (see the breadcrumbs at the top of the page).</p> <p>Enter 0000000218 into the Empl ID field.</p> <p>Empl ID: <input type="text" value="begins with"/> <input style="border: 2px solid red;" type="text"/></p>
4.	<p>Click the Correct History option.</p> <p><input style="border: 2px solid red;" type="checkbox"/> Correct History</p>
5.	<p>Click the Search button.</p> <p><input style="border: 2px solid red;" type="button" value="Search"/></p>
6.	<p>Click the 0000000218 link.</p> <p>0000000218</p>
7.	<p>The system displays the Job Data page, and is open to the Work Location tab.</p> <p>1 of 3 means that there are 3 rows of data in the system, and this is the most recent row of data.</p>
8.	<p>The action is Termination.</p> <p>This is the incorrect row that needs to be deleted from the database.</p>

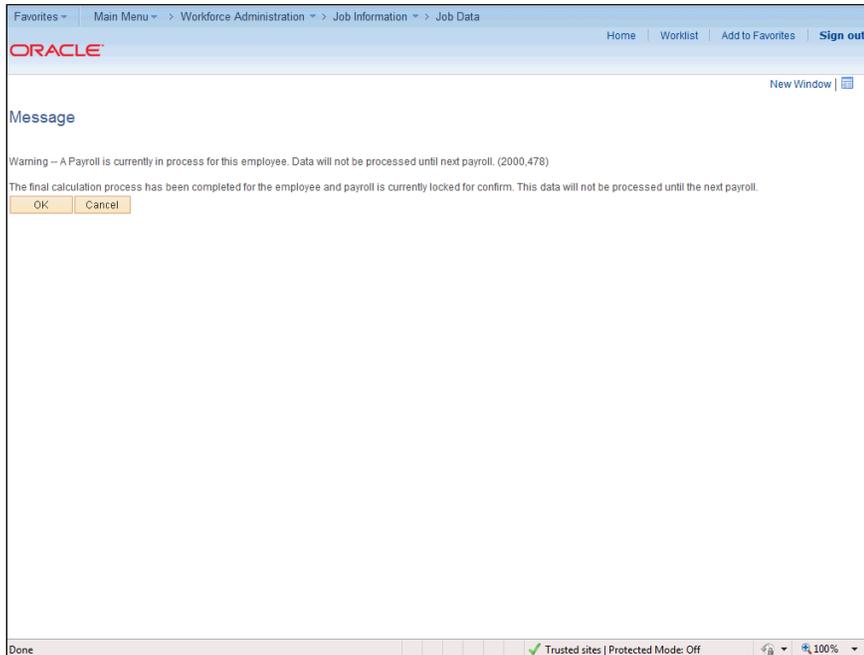
Step	Action
9.	Click the Delete row 1 button. 



Step	Action
10.	Click the OK button to confirm the deletion. When you then click Save , the system will delete this record from the database. There is no audit trail for this deletion. 

CAPPS HR/PAYROLL

EUT Course



Step	Action
11.	<p>The system <i>might</i> display a warning message. In this example, since a payroll is currently in process for this employee, a message warns you that this change will not be processed until the next payroll.</p> <p>Click the OK button.</p> 
12.	<p>Now there are only two rows of Work Location data (instead of 3).</p> <p>The system displays row 1 of 2.</p>
13.	<p>Click the Vertical Scrollbar to scroll down the page.</p>
14.	<p>You are sure that you want to permanently remove the termination row from the database.</p> <p>Click the Save button.</p> 
15.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

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.

Error Message

An error message stops the process due to data entry or process error. It requires the user to correct the problem before continuing.

ESS

ESS stands for Employee Self Service.

Location Code

Location Code defines a physical location of an agency. State reporting regulations require an agency to have at least one location code for each county in which their employees work. More detailed and discrete Location Codes are optional for an agency.

MSS

MSS stands for Manager Self Service.

SetID

SetID is a core value for each agency; it identifies the data-set for that particular agency. A SetID always begins with the letters "TX" followed by the Agency Number (*e.g.*, TX304).

Warning Message

A warning message alerts of a potential data entry error or change. It does, however, allow updates to be saved.

CAPPS HR/PAYROLL

EUT Course



Worklist

A Worklist is an organized list of items which require your attention (e.g., approval of one-time merit pay). The system automatically routes an item to the appropriate manager's (or supervisor's) worklist.