Add a Job

HR FRONT END TRAINING

HOW-TO GUIDE
APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.

You are responsible for any activity that occurs using your logon

- Do not share your passwords or store them in an unsecured manner.
- Do not leave your workstation unattended while logged on to administrative information systems.

You have access to very sensitive personal information

- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Any violation could subject you to disciplinary action.
HR Front End Add a Job Quick View

1. Locate the employee’s record and initiate an Add a Job transaction

2. Complete the Employee Class Determination screen

3. Complete the Job Dates screen

4. Select position and complete the Position Data screen

5. Complete the Job Data screen

6. Review Employee Record View

7. Transaction is routed and applied to Banner
Add a Job

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Add a Job

**Introduction**

This guide will help you understand and process Add a Job transactions in the HR Front End. It includes an explanation of the Add a Job transaction and gives general guidelines about when it is appropriate to use the Add a Job transaction type. It also provides instructions on how to complete Add a Job transactions.

**Assumptions**

This guide assumes that you have completed the *HR Front End Overview and Navigation* online course. This prerequisite helps acquaint you with the general functionality of and navigation in the HR Front End. Material presented in the *HR Front End Overview and Navigation* course is not repeated in this guide.

Before processing an Add a Job transaction, ensure that prior approvals have been obtained where applicable.

**What is an Add a Job Transaction?**

Add a Job transactions are used in the HR Front End any time a new job is added to an existing employee with an active status. Some examples of when the Add a Job transaction would be used include:

- Adding a secondary job
- Adding a lump sum job
- Adding a stipend job

Note that when you need to add a job previously held by the employee (same Position Number and Suffix) you must use a Reappointment transaction.

**Conventions Used in this Guide**

- Indicates a **Note** or additional information that might be helpful to you.
- Indicates a **Hint** such as a tip, shortcut, or additional way to do something.
- Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.
Adding a Job

The Add a Job transaction is completed through a wizard that guides you through a series of screens. Once all of the screens in the wizard are complete, you are brought back the Employee Record View to review the proposed change and route the transaction on to be reviewed and applied to Banner.

Initiating an Add a Job Transaction

To initiate an Add a Job transaction, you must first open the employee’s record.

1. Click Employee Search in the navigation bar at the top of the screen.
   
   The Employee Search screen appears.

   ![Figure 1: Employee Search screen](image)

   2. Type or select the search criteria in the available fields and click Search.

   The search results appear in a table at the bottom of the screen.

   3. Highlight the desired employee in the results list and click Select.

   The Employee Record View for the selected employee appears.
Figure 2: Employee Record View

4. From the **Transactions** menu, select **Add a Job**.

   The **Employee Class Determination** screen of the **Add a Job** wizard appears.
**Determining the Job Employee Class**

Use the **Employee Class Determination** screen to establish the Employee Class for the job being added. The screen automatically refreshes and populates questions based on the Employee Group selected and the previous questions answered.

![Employee Class Determination screen](image)

**Figure 3: Employee Class Determination screen**

5. Select the appropriate **Employee Group** for the job you are adding.
6. Complete the fields displayed based on the Employee Group selected.

**NOTE**: Refer to Table 1: Employee Group Determination Questions for more information on the questions that appear for each Employee Group.

7. Click **Continue**.

   *The Job Dates screen of the wizard appears.*
<table>
<thead>
<tr>
<th>Employee Group</th>
<th>Determination Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A – Faculty</td>
<td>• Does the Employee hold a J1, J2, F1, or F2 Visa?</td>
</tr>
<tr>
<td></td>
<td>• Total % Employed</td>
</tr>
<tr>
<td></td>
<td>• Length of Academic Contract</td>
</tr>
<tr>
<td></td>
<td>• Service Begin and End Dates (Contracts less than 9 months)</td>
</tr>
<tr>
<td></td>
<td>• Pay Basis (Contracts 9 months or greater)</td>
</tr>
<tr>
<td>B – Academics</td>
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<td>C – Civil Service Web Dept</td>
<td>• Does the Employee hold a J1, J2, F1, or F2 Visa?</td>
</tr>
<tr>
<td>Time Entry D – Civil Service Time Report Feeder</td>
<td>• Total % Employed</td>
</tr>
<tr>
<td></td>
<td>• Work Week Hours</td>
</tr>
<tr>
<td></td>
<td>• Status (Exempt or Non-Exempt)</td>
</tr>
<tr>
<td></td>
<td>• Exempt Type (if exempt)</td>
</tr>
<tr>
<td></td>
<td>• Is this person a Flex year or Seasonal employee?</td>
</tr>
<tr>
<td></td>
<td>• Non-work period begin and end dates (Flex year or seasonal employees only)</td>
</tr>
<tr>
<td>E – Civil Service Extra Help</td>
<td>• Is this position seasonal?</td>
</tr>
<tr>
<td>H – Academic Hourly / Grad Hourly</td>
<td>• Is the employee an Academic or a Grad Hourly?</td>
</tr>
<tr>
<td>S – Students</td>
<td>• No Additional Information Required</td>
</tr>
<tr>
<td>T – Retiree / Annuitant U – Unpaid</td>
<td></td>
</tr>
<tr>
<td>V – Virtual</td>
<td></td>
</tr>
</tbody>
</table>

**Table 1: Employee Group Determination Questions**
**Entering Job Dates**

The **Job Dates** screen of the Add a Job wizard confirms the employee class for the new job and allows you to enter the date the new job record begins and ends (if applicable). Note that some employee classes require a job end date, while this field is optional for others. If the **Job End Date** field is left blank when it is required, an error message appears.

![Figure 4: Job Dates Screen](image)

8. Verify that the correct employee class appears in the **Job Employee Class** field.

   **NOTE**: If the Job Employee Class is incorrect, click the **E-Class** link in the breadcrumb to navigate back the **Employee Class Determination** screen.

9. Enter the **Job Begin Date** and the **Job End Date** (if applicable).

10. Click **Continue**.

    *The Position Selection screen of the wizard appears.*
**Selecting the Position**

The next step in the Add a Job Wizard is the **Position Selection** screen. This screen offers one to three methods of specifying a position number depending on the Employee Class and your permissions:

- Directly enter a position number
- Search for a position
- Create a new position

Figure 5: Position Selection screen
Option 1: Entering a Position Number

If you know the position number, you can enter it directly in the I Have a Position Number field (see Figure 5).

1. Enter the position number in the I Have a Position Number field
2. Click Continue.

The Position Data screen of the wizard appears.

Option 2: Searching for a Position

If you do not have a position number, you can search for possible positions. This search returns any vacant or pooled positions that match the employee’s job employee group, as well as all available Lump Sum positions, within a specified organization. Position searches are restricted to the chart of accounts and organizations within your security permissions.

NOTE: The Search option is not available for Civil Service and Extra-Help employee groups.

1. Select the COA and ORG in which you want to search (see Figure 5).
2. Click Search.

The matching search results are displayed.
3. Highlight the desired position.
4. Click Continue.

The Position Data screen of the wizard appears.

NOTE: Single positions that are currently occupied, but have an end date within 30 days of the current date will show in the search results.

Position Selection Option Message

The Position Selection Option Message screen appears if the employee currently holds or has previously held the position entered or selected.

1. Select the radio button next to one of the following options and click Continue.
   a. Go to the Reappointment Wizard to reactivate this job.
      The Reappoint/Reactivate Job Wizard appears. Refer to the Reappointment guide for more information on this transaction type.
   b. Return to Position Selection Page
      Returns you to the Position Selection screen to enter a different position number.
   c. Add a new job with this Position Number and a new Suffix
      Continues to the Position Data screen of the wizard.
**Option 3: Creating a New Position**

If you cannot find a position that meets your needs using the search, you also can create a new position.

> **NOTE:** The Create New Position option is not available for Civil Service and Extra-Help employee groups.

1. Select the **Campus** for the new position (see Figure 5).
2. Click **Create New Position**.

   *The Position Data screen of the wizard appears.*
3. Complete the necessary fields on the **Position Data** screen.

> **NOTE:** For more information on Creating New Positions, see the Position Creation and Maintenance guide.

**Editing Position Data**

Once you select a position, the next step in the Add a Job Wizard is the **Position Data** screen. This screen allows you to edit existing data for a Single position or create a new position. (For information on editing Pooled positions see the Position Creation and Maintenance guide.) Fields that can be edited for an existing position include: Position Class, Position Title, Position Employee Class, Type, PAPE Number, Job Progression, Position Descriptors, Budget Profile, Budget COA, Budget ORG, and Position Labor Distribution. The ability to edit Position Data is based on the Employee Group your permissions.
11. Review the **Position Data** screen.

12. Make any necessary changes in the editable fields. If creating a new position, complete all required fields.

13. Click **Continue**.

   *The Job Data screen of the wizard appears.*

   **NOTE:** For more information on Creating New Positions, see the Position Creation and Maintenance guide.

   **NOTE:** Position Data is not editable for Civil Service, Extra Help, and Student positions.
**Editing Job Data**

The final step in the Add a Job Wizard is the **Job Data** screen. This screen is used to capture the most important information related to an employee’s job. The majority of the fields on this screen populate based on the **Position Data** screen. Fields that can be edited for Job Data are dependent on the E-Class and may include: Suffix, Job Title, Job FTE, Pay Rate, Job Change Reason, Timesheet COA and ORG, Time Entry Method, Leave Category, Accrue Leave, job Labor Distributions, and Job Comments.

![Job Data Screen](image)

*Figure 8: Job Data Screen*
1. Review the **Job Data** screen.
2. Edit any fields that require changes.
3. Click **Continue**.

   *The Employee Record View appears.*

   **WARNING:** When adding 9/12 jobs, be sure to validate that all Pay Rate fields have calculated correctly. Under certain circumstances, these fields will need to be manually calculated and entered.

### Adding Job Comments

Comments entered in the Job Comments section will feed to Banner and become a permanent part of the employee job record.

1. Enter comments in the **Job Comments** field.
2. Click **Add Comment**.

   *The Job Comment is saved.*
3. Click **Continue**.

   *The Employee Record View appears.*

#### Figure 9: Adding Job Comments
Completing the Add a Job

After the last screen of the wizard is completed, the Employee Record View displays the state of the employee as of the Job Begin Date entered into the wizard.

![Employee Record View after Add a Job Wizard](image)

**Figure 10: Employee Record View after Add a Job Wizard**

Routing the Transaction

To move the transaction to the next stop on the route path:

1. Click **Route**.

   Any informational or error messages are displayed in the yellow message area in the Employee Record View. If transaction is routed successfully, message will display showing the routing destination.
Figure 11: Success Routing Message – Add a Job Transaction
Appendix A: Screenshots from HRFE Video

Welcome to the:

Add a Job

course
This course will help to equip you when working with Add a Job transactions in the HR Front End Application.

<table>
<thead>
<tr>
<th>CHAPTER</th>
<th>YOU WILL LEARN ABOUT</th>
</tr>
</thead>
</table>
| 1 – Common Terminology | • Common Terminology  
| | • What an Add a Job transaction is  
| | • Add a Job Quick View |
| 2 – Initiating and Navigating the Add a Job Wizard | • How to initiate an Add a Job transaction  
| | • How to enter the Add a Job Wizard  
| | • How to determine the Employee Class  
| | • How to enter the Job Dates  
| | • How to select and update a position  
| | • How to add a job  
| | • How to enter a Comment |
| 3 – Reviewing the Add a Job Transaction in Employee Record View | • About the proposed changes accordion  
| | • How to Route |
| 4 – Course Review | • You will participate in activities that will assess your understanding of the content covered in this course |
Appropriate Use and Security of Confidential and Sensitive Information

Users are responsible for any activity that occurs during their logon. The HR Front End Application allows users to access confidential and sensitive information. Guidelines have been created to help users manage their responsibility.

- Do NOT share passwords or store them in an unsecured manner
- Do NOT leave workstation unattended while logged on to administrative information systems
- Do NOT share confidential and sensitive information with anyone, including colleagues, unless there is a business reason
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view
- Secure reports containing confidential and sensitive information (e.g. FERPA, EEO, or HIPAA protected data)
- Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.
Chapter 1

Common Terminology

In this Chapter, you will learn:

- Common Terminology
- What an Add a Job transaction is
- Add a Job Quick View
### Add a Job Transaction - Button Functionality

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>FUNCTIONALITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply</td>
<td>The <strong>Apply</strong> feature completes the transaction and applies the data to Banner. The User must have <strong>Apply</strong> permissions for this button to be active.</td>
</tr>
<tr>
<td>Close</td>
<td>The <strong>Close</strong> button enables the user to exit the transaction.</td>
</tr>
<tr>
<td>Continue</td>
<td>The <strong>Continue</strong> button is used to proceed through the screens of a Wizard.</td>
</tr>
<tr>
<td>Delete Transaction</td>
<td>The <strong>Delete Transaction</strong> button is used to delete a transaction from the system.</td>
</tr>
<tr>
<td>Print Friendly View</td>
<td>The <strong>Print Friendly View</strong> button opens a separate window that will align the data from the current screen in a format that can be easily printed.</td>
</tr>
<tr>
<td>Route</td>
<td>The <strong>Route</strong> feature sends the transaction on to the next stop in the predetermined routing for the transaction.</td>
</tr>
<tr>
<td>Save</td>
<td>The <strong>Save</strong> button is used to save the transaction to be worked on at a time in the future. Saved transactions can be accessed in the User’s Inbox (My Inbox).</td>
</tr>
<tr>
<td>Send To</td>
<td>The <strong>Send To</strong> feature allows the transaction to be sent to a user that is not in the predetermined routing for the transaction.</td>
</tr>
</tbody>
</table>

**Unit 1: Click the Next button to continue.**
What is an Add a Job Transaction?

Add a Job transactions are used in the HR Front End any time a new job is added to an existing employee with an active status. Some examples of when the Add a Job transaction would be used include:

- Adding a secondary job
- Adding a lump sum job
- Adding a stipend job

Note that when you need to add a job previously held by the employee (same Position Number and Suffix) you must use a Reappointment transaction.
Add a Job Quick View

1. Locate the employee’s record and initiate an Add a Job transaction
2. Complete the Employee Class Determination screen
3. Complete the Job Dates screen
4. Select position and complete the Position Data screen
5. Complete the Job Data screen
6. Review Employee Record View
7. Transaction is routed and applied to Banner

Click the Next button to continue.
Chapter 1 Review

In this Chapter, you have learned:

- Common Terminology
- What an Add a Job transaction is
- Add a Job Quick View
Chapter 2

Initiating and Navigating the Add a Job Wizard

In this Chapter, you will learn:

• How to initiate an Add a Job transaction
• How to enter the Add a Job Wizard
• How to determine the Employee Class
• How to enter the Job Dates
• How to select and update a position
• How to add a job
• How to enter a Comment
To initiate the transaction click **Add a Job** from the Transactions Menu.

To begin an Add a Job Transaction, you must first open the employee's record. Once you have selected a UIN that you have permissions to, you will be taken to the Employee Record View.
You have chosen to Add a New Job. This section will help determine the appropriate employee class. Please complete the required information and click Continue.

Select the appropriate Employee Group from the list below.

Employee Group:
- Select One
- Select One
- Faculty and Other Academics
- Academic Professionals
- Civil Service Web/Doc Team
- Civil Service Time Report Feed
- Civil Service Extra Help
- Grads and Predocs Fellows
- Academic Hourly & Grad Hrs
- Lump Sum
- Summer
- Postdoc Fellow/ResAssoc/Hr
- Residents
- Student
- Unpaid
- Virtual

Select A - Faculty and Other Academics.

Use the Employee Class Determination screen to establish the Employee Class for the job being added. The screen automatically refreshes and populates questions based on the Employee Group selected and the previous questions answered.
End a Job Transaction - HR Front End

You have chosen to Add a New Job. This section will help determine the appropriate employee class. Please complete the required information and click Continue.

Select the appropriate Employee Group from the list below.

**EMPLOYEE GROUP**
- A - Faculty and Other Academics

Please answer the questions below.

Does the Employee hold a J1, J2, F1, or F2 Visa?
- [ ] Yes
- [ ] No

**TOTAL % EMPLOYED**
- 100

What is the length of the academic contract?
- [ ] Greater than or equal to 9 months

What is the pay basis?
- [ ] 9/12

---

The Employee Group you select determines the questions that are asked.

Note that the highlighted fields have been answered for you.

For a complete list of questions that will appear according to Employee Group click the Employee Group button below.

< Employee Group Question List

---

Click the Next button to continue
# Employee Group Determination Questions

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<td>G – Grad's / Pre-Doc Fellows</td>
<td>• Length of Academic Contract</td>
</tr>
<tr>
<td>P – Post Doc Fellows, Research Associates, and Interns</td>
<td>• Service Begin and End Dates (Contracts less than 9 months)</td>
</tr>
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<td>R – Residents</td>
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<td>C – Civil Service Web Dept Time Entry</td>
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<tr>
<td>H – Academic Hourly / Grad Hourly</td>
<td>• Status (Exempt or Non-Exempt)</td>
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<td>S – Students</td>
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<td>• Is this person a Flex or Seasonal employee?</td>
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<tr>
<td>V – Virtual</td>
<td>• Is the employee an Academic or a Grad Hourly?</td>
</tr>
<tr>
<td></td>
<td>• No Additional Information Required</td>
</tr>
</tbody>
</table>
You have chosen to Add a New Job. This section will help determine the appropriate Employee Group and other information and click Continue.

Select the appropriate Employee Group from the list below.

**Employee Group**
- Faculty and Other Academics

Please answer the questions below:

- Does the Employee hold a J1, J2, F1, or F2 Visa?
  - Yes
  - No

**Total %:**

100

What is the length of the academic contract?

- Greater than or equal to 9 months

**Click Continue.**
Add a Job Transaction - HR Front End

You have chosen to Add a New Job. Please complete the information below.

JOB EMPLOYEE CLASS: AA - Acad Std Benefit Elig
JOB BEGIN DATE: 1/1/2010
JOB END DATE: 

Click Continue to select position information.

Enter Job Begin date of 1/1/2010. Then click Continue.

The Job Dates screen of the Add a Job wizard confirms the employee class for the new job and allows you to enter the date the new job record begins and ends (if applicable). Note that some employee classes require a job end date, while this field is optional for others. If the Job End Date field is left blank when it is required, an error message appears.
Enter Position Number S96331, click Continue then click Next.

The next step in the Add a Job Wizard is the Position Selection screen. This screen offers one to three methods of specifying a position number depending on the Employee Class and your permissions:

- Directly enter a position number
- Search for a position
- Create a new position

Normally by clicking Continue you would be taken to the Position Data screen, however in this example we want to show you both options of entering a position number and searching for a position number.

To learn more about each option visit the Position Creation and Maintenance course.
For this example, we are going to search for a position.
If you want to reuse a position, click ‘Search’, select from the list of positions returned, and click ‘Continue’. If you want to create a new position, click the ‘Create New Position’ button.

Search may take some time, please wait.

For Campus: C - UIC Chicago

Click Continue.
Once you select a position, the next step in the Add a Job Wizard is the Position Data screen. This screen allows you to edit existing data for a Single position or create a new position. (For information on editing Pooled positions see the Position Creation and Maintenance Course). Fields that can be edited for an existing position include: Position Class, Position Title, Position Employee Class, Type, PAPE Number, Job Progression, Position Descriptors, Budget Profile, Budget COA, Budget ORG, and Position Labor Distribution. The ability to edit Position Data is based on the Employee Group and your permissions.

Click the Next button to continue.
Once necessary changes are made, we are ready to continue.

Click Continue.
The final step in the Add a Job Wizard is the Job Data screen. This screen is used to capture the most important information related to an employee’s job. The majority of the fields on this screen populate based on the Position Data screen. Fields that can be edited for Job Data are dependent on the E-Class and may include: Suffix, Job Title, Job FTE, Pay Rate, Job Change Reason, Timesheet COA and ORG, Time Entry Method, Leave Category, Accrue Leave, job Labor Distributions, and Job Comments.

Enter 0.0 in the Job FTE field.

Click the Next button to continue.
1. Enter "test" into the Comments field.
2. Click Add Comment.

Comments entered in the Job Comments section will feed to Banner and become a permanent part of the employee job record.
Add a Job Transaction - HR Front End

The comment you entered will have both your UserID and a time and date stamp. You cannot delete the comment once entered.

Click the **Next** button to continue.
Chapter 2 Review

In this Chapter, you have learned:

- How to initiate an Add a Job transaction
- How to enter the Add a Job Wizard
- How to determine the Employee Class
- How to enter the Job Dates
- How to select and update a position
- How to add a job
- How to enter a Comment
Chapter 3

Reviewing the Add a Job Transaction in Employee Record View

In this Chapter, you will learn:

- About the proposed changes accordion
- How to Route

Click the Next button to continue
The Proposed Changes accordion summarizes all of the changes proposed in this transaction. If there are multiple components for the transaction, click the View link. Click the Wizard link to make changes in the wizard.

Click either Route button to continue.
Success messages will appear each time the transaction has been successfully routed to a different stop. As the transaction travels along the routing path, users will be able to retrieve the transaction from their inboxes so that they can take ownership of it, review it, and send it to the next stop in the routing path.

This will happen all the way to the Apply stop in the routing path.
Chapter 3 Review

In this Chapter, you have learned:

- About the proposed changes accordion
- How to Route
You have reached the conclusion of the Add a Job Course. Feel free to navigate to any section of this course. In order to certify your completion of this course, please click the COMPLETE COURSE button below.