

Additional Elements HR FRONT END TRAINING HOW-TO GUIDE



Acknowledgements

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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 login

- 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 Additional Elements Quick View

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2	<ul style="list-style-type: none">• Attaching Documentation to a Transaction
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Introduction

Assumptions

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 Multiple Transaction Components to an Employee Record

There might be times when users will perform multiple transaction types on an employee at the same time. This can be done by adding additional components to a transaction. The example being shows what would happen when a user needs to perform an Employee Job Record Change after an Employee Data Change has been initiated and saved.

Upon initiating and saving the first transaction type, the Proposed Changes accordion will populate the Employee Record View. This tells users about the transaction type(s) that are being applied to the employee's record. If an additional component is to be added (in this case, an Employee Job Record Change), type has after the first transaction been saved:

1. Under the Proposed Changes accordion, click the **Add Change** button.

Proposed Changes Accordion

The screenshot displays the 'Employee Record View' interface. At the top, there is a navigation bar with links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, a summary bar shows employee details: 9-699008-AITS ITPC, ECLS: [icon], Total FTE: 1.000, Base Salary: \$47,278.13, Total Salary: \$47,278.13. A full view summary line reads: Full View: Transaction (1676:4340) EMPDATA (5438): Owner-Yes ([icon]): Not Completed: Editable: BioDemoAccess: JobAccess-[U22218-00], Stop: DEPT: Default: Initiate B U-9-AB-699-699008 (1676:4340). A date field shows 1/23/2009 with a View button. On the right, there are buttons for Limited ERV and Timeline View.

The 'PROPOSED CHANGES' accordion is expanded, showing a table with the following columns: ID, Change Date, Personnel Date, Job, TS Org, Job Change Reason, Change Type, and a Delete button. The table contains one row with ID 5438, Change Date 01/23/2009, and Change Type EMP. Below the table is an 'Add Change' button, which is highlighted with a red box.

Below the accordion, there are tabs for GENERAL INFO, BIO / DEMO, MEMOS, ATTACHMENTS, and AUDIT TRAIL. The 'GENERAL INFO' tab is selected, showing 'EMPLOYEE GENERAL INFORMATION'. Below this, there are buttons for Route, Save, Cancel, Release Ownership, Send To, Send FYI, and Print Friendly View.

The 'JOBS' section is also visible, showing a job record for U22218-00: [icon] ECLS: [icon] TS ORG: 9-904001 TYPE: P FTE: 1.000 MTHLY: \$3,939.84 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: [icon]. Below this, there are buttons for Route, Save, Cancel, Release Ownership, Send To, Send FYI, and Print Friendly View.

Figure 1: Proposed Changes Accordion

Once the screen refreshes along with the Transactions menu,

2. Enter the View Date and
3. Select another transaction type (the example chosen in the image is the Employee Job Record Change transaction).

The screenshot displays the 'Employee Record View' interface. At the top, there is a navigation bar with links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS (selected), ADMIN TOOLS, HELP, and LOGOUT. Below this, a summary bar shows employee details: 9-699008-AITS ITPC, ECLS: [icon], Total FTE: 1.000, Base Salary: \$17,278.13. A 'Full View' section provides transaction details: Transaction (1676:4340) EMPDATA (5438):Owner-Yes, DEPT:Default:Initiate B U-9-AB-699.699008 (1676:4340). A 'DATE:' field is set to 1/23/2009, with a 'View' button circled in yellow and labeled '2'. Below this is a 'PROPOSED CHANGES' table with columns: ID, Change Date, Personnel Date, Job, TS Org, and Job. The table contains one row: ID 5438, Change Date 01/23/2009. To the right of the table is a 'Change Type' dropdown menu set to 'EMP'. A dropdown menu is open from the 'TRANSACTIONS' button, showing options: Transaction History, Initiate New Hire, Position Creation and Maintenance, Delete Entire Transaction, Add a Job, Employee Job Record Change (circled in yellow and labeled '3'), Historical Job Change, Job End Date, Labor Distributions, and Reappoint/Reactivate Job. Below the table are tabs: GENERAL INFO (selected), BIO / DEMO, MEMOS, ATTACHMENTS, and AUDIT TRAIL. The 'GENERAL INFO' tab shows 'EMPLOYEE GENERAL INFORMATION'. Below this is a 'JOBS' section with a table showing job details for U22218-00: ECLS: [icon], TS ORG: 9-904001, TYPE: P, FTE: 1.000, MTHLY: \$3,939.84, BEGIN: 6/4/2007, END: 5/30/2009, BGT PRO: X, STATUS: A. There are 'Print Friendly View' buttons for both the 'EMPLOYEE GENERAL INFORMATION' and 'JOBS' sections.

Figure 2: Selecting Additional Transaction Component

The screen will refresh and the appropriate fields for the selected transaction will be editable.

4. Expand the appropriate accordion and enter the information needed for the transaction that was selected
5. Click the **Save** button when finished

The screen will refresh once again. Both components will be under the **Proposed Changes** accordion. At this point, the user may do any of the following:

- View the changes made by clicking the **View** link under the Proposed Changes accordion
- Add another component by clicking the **Add Change** button
- Delete a component by clicking the respective **Delete** button

Employee Record View

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Transaction: 9-699008 AITS ITPC ECLS: Total FTE: 1.000 Base Salary: \$48,000.00 Total Salary: \$48,000.00

Full View: Transaction (1676:4340) JOBCHANGE (5461): Owner=Yes (p...): Not Completed: Editable: BioDemoAccess: JobAccess=[U22218-00], Stop: DEPT: Default: Initiate B U 9 AB 699 699008 (1676:4340)

DATE: 1/23/2009 View Limited ERV Timeline View

PROPOSED CHANGES

ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type	View
5438	01/23/2009					EMP	Delete
5461	01/23/2009	01/23/2009	U22218-00 VST TRAINING SPEC II	9-904001 AVP Human Resources/Shared	SA010, Pay Change	ERC	Delete

Add Change

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE GENERAL INFORMATION

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

JOBS

Expand All

Job ID	ECLS	TS Org	Type	FTE	Mthly	Begin	End	BGT Pro	Status
U22218-00		9-904001	P	1.000	\$4,000.00	6/4/2007	5/30/2009	X	

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

Figure 3: Multiple Components on an Employee Record

Once all necessary information has been added to the transaction, users will be able to:

- Route** the transaction
- Send an **FYI** (a read-only copy of the transaction)
- Perform a **Send-To** (sending the transaction to a user/group inbox that exists outside of the pre-determined routing path)
- Cancel** the transaction (closing the transaction with all changes made prior to the last save of the transaction)

Attaching Documentation to a Transaction

The HR Front End allows users to attach supporting documentation, such as offer and acceptance letters, to transactions. These documents will only be viewable by the HR Front End users that have permissions to that transaction. In addition, the person who attaches the documents may deem the documents viewable only by certain orgs by setting the viewable orgs flag. When this is done, the document is only viewable to users with the same or higher permissions as the original user. Attached documentation is stored in Banner Xtender Service (BXS) and once the transaction has been applied, the document will also be viewable by Central Human Resources through the Document Management System (DMS) in BXS through normal BXS security permissions.



NOTE: For a list of acceptable document types, see the Appendix.

Attaching Documentation

1. After entering all transaction data, from the Employee Record View screen, click the **Attachments** tab.
2. Click the **Add Attachment** button.

The Attach Documents screen appears.

Employee Record View

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

9-699008-AITS ITPC ECLS: Total FTE: 1.000 Base Salary: \$48,000.00 Total Salary: \$48,000.00

Full View: Transaction (1676:4340) JOBCHANGE (5461): Owner=Yes (); Not Completed: Editable: BioDemoAccess: JobAccess=[U22218-00], Stop: DEPT: Default: Initiate B U 9-AB-699-699008 (1676:4340)

DATE: 1/23/2009 View Limited ERV Timeline View

PROPOSED CHANGES

GENERAL INFO BIO / DEMO MEMOS **ATTACHMENTS** AUDIT TRAIL

1

Title	Doc Type	Description	Viewable Orgs
Add Attachment Save			

2

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

JOBS

Expand All

U22218-00: ECLS: TS ORG: 9-904001 TYPE: P FTE: 1.000 MTHLY: \$4,000.00 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

Figure 4: Attachments Tab

In the Attach Document screen:

1. Select the **Browse** button to locate the document to be attached
2. In the File Upload window, **click on the Document** to be uploaded
3. In the File Upload window, click the **Open** button
4. Click the **Add** button to add the button to the **Attachments to be Uploaded** section.

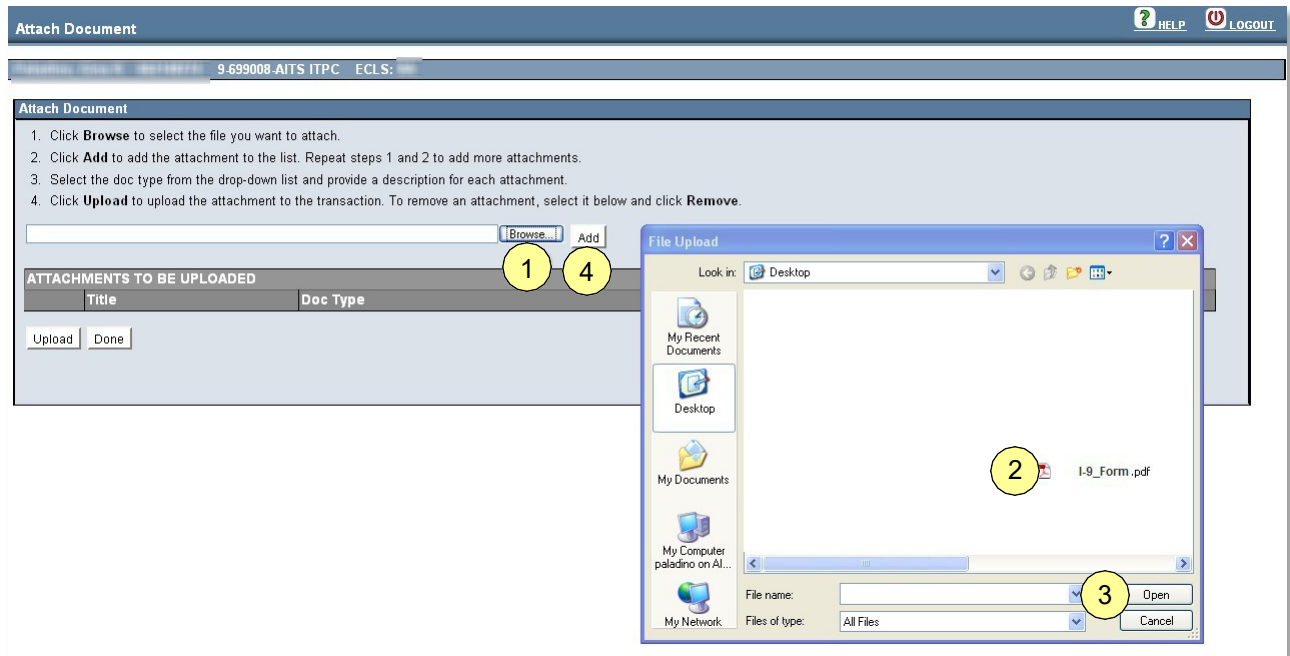


Figure 5: Selecting Documentation to Attach

5. Once the screen refreshes:
 - a. Select the correct **Document Type** from the list provided
 - b. Enter a **Description** in the text field
 - c. Click the **Upload** button to upload the documentation



NOTE: Clicking the **Remove** button will remove the document from the Attachments to be Uploaded section. **Repeat** Steps 1-3 to attach additional documentation. Click the **Done** button when finished uploading documents.

Attach Document HELP LOGOUT

9.699008.AITS ITPC ECLS: BA

Attach Document

1. Click **Browse** to select the file you want to attach.
2. Click **Add** to add the attachment to the list. Repeat steps 1 and 2 to add more attachments.
3. Select the doc type from the drop-down list and provide a description for each attachment.
4. Click **Upload** to upload the attachment to the transaction. To remove an attachment, select it below and click **Remove**.

ATTACHMENTS TO BE UPLOADED			
	Title	Doc Type	Description
<input type="button" value="Remove"/>	I-9_Form.pdf	<div style="border: 1px solid black; padding: 2px;"> PLEASE SELECT PLEASE SELECT ADDRESS CHO ADMIN LEAVE AGREEMENTS APPLICATION BACKGROUND CHECK BEN 403B ACCT APPLICATION BEN 403B OTHER BEN 403B SAL REDUCT BEN ACTION FORM BEN CHILD SUPPORT ORDER BEN CMS BEN CHOICE BEN CMS BILLING/DISCREP BEN CMS CHANGE OF STATUS BEN CMS COORD OF BENEFIT BEN CMS CORRECTION FORM BEN CMS DCAP ENROLLMENT BEN CMS DEFERRED COMP BEN CMS DEPENDENT DOCUMENTATION BEN CMS DOMESTIC PARTNER ENROLL </div>	<input type="text"/>

Figure 6: Uploading the Documentation

Editing the Viewable Orgs

By default, any HR Front End user that has permissions to view a transaction can also view the documents attached to the transaction. If a document contains sensitive information, a user can limit the viewing of a document by Org.



NOTE: Users will only be able to edit Viewable Orgs when the transactions routing path involves multiple orgs.

From the Employee Record View screen under the Attachments tab, users can:

- View the attachment by clicking the **View** button
- Delete the attachment by clicking the **Delete** button
- Edit the document type by selecting from the **Doc Type** list
- Edit the description in the **Description** text area
- Edit the **Viewable Orgs** by selecting/deselecting the associated check boxes
- Save the attachments by clicking the **Save** button

Figure 7: Editing Options

Accessing Transactions from the In/Outboxes

The In/Outboxes are where users will be able to locate transactions and their statuses. In order to access the In/Outboxes, users will click the **In/Outboxes** link on the **Home Page** in the HR Front End.

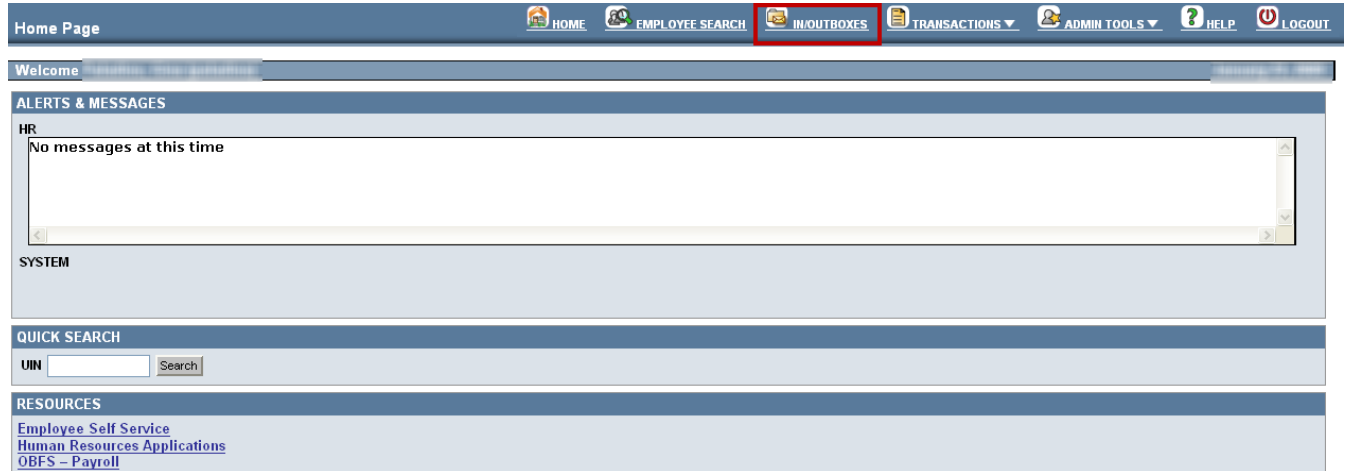


Figure 8: Accessing the In/Outboxes

Upon clicking the In/Outboxes link, the screen will refresh and the users will be presented with four different locations as to where they can access transactions:

- My Inbox
- Group
- Inboxes My
- Outbox
- Group Outboxes

My Inbox

My Inbox contains transactions that the user has ownership of (either by initiating the transaction himself or herself, taking ownership of it, or another user sent the transaction directly to them)

In order to access transactions in **My Inbox**:

1. Access the My Inbox, by selecting the **My Inbox** radio button
2. Select the transaction by clicking on it once (which will highlight the transaction)
3. Click the **Select** button

The screen will refresh and will take users to the Employee Record View where they can review/edit the transaction.

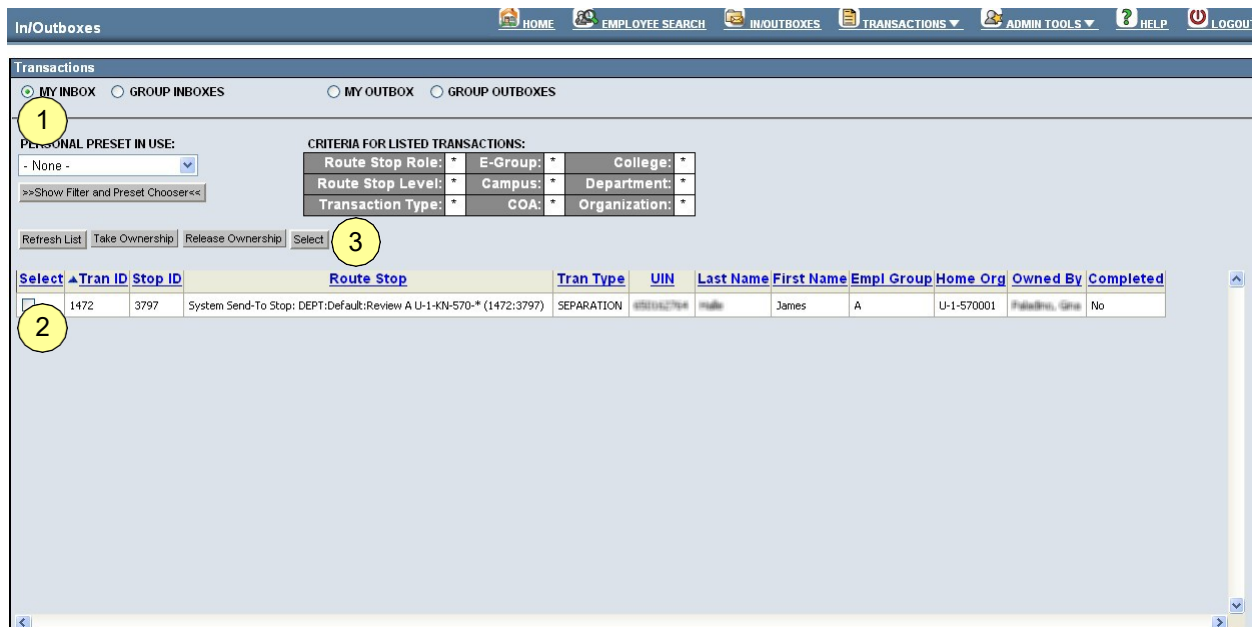


Figure 9: Accessing Transactions from My Inbox

Group Inboxes

Group Inboxes contain transactions that have been routed/sent to a group of individuals with similar security permissions. In order to access transactions from the **Group Inboxes**, users must take ownership of them.

In order to access and take ownership of transactions in **Group Inboxes**:

1. Access the Group Inboxes, by selecting the **Group Inboxes** radio button
2. Select the transaction by clicking on it once (which will highlight the transaction)
3. Click the **Take Ownership** button



NOTE: From this point, users may navigate to the My Inbox to locate the transaction.

Select	Tran ID	ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
<input checked="" type="checkbox"/>	472	3797	System Send-To Stop: DEPT:Default:Review A U-1-KN-570-* (1472:3797)	SEPARATION	1472:3797	male	James	A	U-1-570001	Faladino, Gina	No

Figure 10: Accessing Transactions from Group Inboxes

Filter and Preset Chooser

The **Filter and Preset Chooser** in the In/Outboxes allows users to both create filters for the transactions that are displayed in the In/Outboxes and create presets that they can apply at any time that they choose.

The following fields will be displayed to let users know what is currently being displayed in their In/Outboxes:

- **Personal Preset in Use** – this area allows users to see if they currently are applying a preset to the list of displayed transactions.
- **Criteria for Listed Transactions** – this area allows users to see which criteria are being shown for the transactions that are listed.

Showing and Hiding the Filter and Preset Chooser

In order to show the Filter and Preset Chooser:

- Click the **Show** Filter and Preset Chooser button In order to hide the Filter and Preset Chooser
- Click the **Hide** Filter and Preset Chooser button (which appears when the Filter and Preset Chooser is being displayed)

The screenshot shows the 'In/Outboxes' interface. At the top is a navigation bar with links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this is the 'Transactions' section. It has radio buttons for 'MY INBOX', 'GROUP INBOXES', 'MY OUTBOX', and 'GROUP OUTBOXES'. Two red boxes highlight specific areas: the 'PERSONAL PRESET IN USE' section, which shows '- None -' and a '>>Show Filter and Preset Chooser<<' button; and the 'CRITERIA FOR LISTED TRANSACTIONS' section, which contains a grid of filters: Route Stop Role, E-Group, College, Route Stop Level, Campus, Department, Transaction Type, COA, and Organization. Below these are buttons for 'Refresh List', 'Take Ownership', 'Release Ownership', and 'Select'. A table displays transaction data with columns: Select, Tran ID, Stop ID, Route Stop, Tran Type, UIN, Last Name, First Name, Empl Group, Home Org, Owned By, and Completed. The first row shows a transaction with Tran ID 1472, Stop ID 3797, and a description 'System Send-To Stop: DEPT:Default:Review A U-1-KN-570-* (1472:3797)'.

Figure 11: In/Outbox Fields

If the **Filter and Preset Chooser** button is clicked and the **Filter and Preset Chooser** is displayed, users have the option of using one or more of the following criteria to serve as a filter for the transaction list:

- **Transaction**
- **Type Route**
- **Stop Role**
- **Route Stop**
- **Action Route**
- **Stop Level E-**
- **Group**
- **UIN**
- **Campus**
- **COA**
- **College** – to select more than one, hold down the CTRL key when selecting
- **Department** – to select more than one, hold down the CTRL key when selecting
- **Organization** – to select more than one, hold down the CTRL key when selecting

The **Filter List** button will allow users to use the current filter settings to apply a temporary filter to the transaction list.

The **Reset Filter** button will reset the filter choices to the default settings.

Figure 12: In/Outbox Filter

Users are also able to create and use presets for the transaction list in the In/Outboxes.

Fields:

- **Select a Preset** – allows users to select from a previously created preset to apply to the transaction list
- **Preset name** – allows users to create a new preset with the filter fields and enter a specific preset name that they can apply at a latertime
- **Make default** – allows users to declare a certain preset to be the default setting for the In/Outbox transaction list

Buttons:

- **Add as Preset** – allows users to add a filter as a preset that they can access later
- **Save updated** – allows users to make updates to a preset that they have
- **Delete Preset** – allows users to delete any presets that they wish to remove

Figure 13: In/Outbox Preset Chooser

My Outbox

My Outbox allows users to view the statuses of all transactions that have moved out of their My Inbox. **My Outbox** contains:

- Transactions on which the users has previously owned and worked
- Transactions which the users has sent down the approval path with a Route
- command Transactions meeting the above criteria that are still in the system

In order to access transactions in **My Outbox**:

1. Access the My Outbox, by selecting the **My Outbox** radio button
2. Select the transaction by clicking on it once (which will highlight the transaction)
3. Click the **Select** button (which takes users to a read-only version of the transaction)

Transactions for **My Outbox**

☐ MY INBOX
 ☐ GROUP INBOXES
 ☒ MY OUTBOX
 ☐ GROUP OUTBOXES

Show Completed Transactions in Outbox for: 30 days. [Apply to List](#) [Set as Default](#)

PERSONAL PRESET IN USE: - None - [»Show Filter and Preset Chooser«](#)

CRITERIA FOR LISTED TRANSACTIONS:

Route Stop Role:	E-Group:	College:
Route Stop Level:	Campus:	Department:
Transaction Type:	COA:	Organization:

[Refresh List](#) [Select](#)

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
<input checked="" type="checkbox"/>	1472	3797	System Send-To Stop: DEPT:Default:Review A U-1-KN-570-* (1472:3797)	SEPARATION		James		A	U-1-570001		No

Figure 14: Accessing Transactions from My Outbox

Group Outboxes

Group Outboxes allow users to view the statuses of all transactions that have been processed by themselves or others with the same security permissions group. **Group Outboxes** contain:

- Transactions on which the user worked (had ownership of)
- Transactions on which the user could have worked (was in the Group Inbox at one time but they did not "own")

In order to access transactions in **Group Outboxes**:

1. Access the Group Outboxes, by selecting the **Group Outboxes** radio button
2. Select the transaction by clicking on it once (which will highlight the transaction)
3. Click the **Select** button (which takes users to a read-only version of the transaction)

Transactions for **GROUP OUTBOXES**

☐ MY INBOX
 ☐ GROUP INBOXES
 ☒ MY OUTBOX
 ☒ GROUP OUTBOXES

Show Completed Transactions in Outbox for: 30 days.

PERSONAL PRESET IN USE:
 - None -
 >>Show Filter and Preset Chooser<<

CRITERIA FOR LISTED TRANSACTIONS:

Route Stop Role: *	E-Group: *	College: *
Route Stop Level: *	Campus: *	Department: *
Transaction Type: *	COA: *	Organization: *

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
<input checked="" type="checkbox"/>	172	3797	System Send-To Stop: DEPT:Default:Review A U-1-KN-570-* (1472:3797)	SEPARATION		James		A	U-1-570001		No

Figure 15: Accessing Transactions from Group Outboxes

Adding Memos to a Transaction

The HR Front End allows users to add **memos** to transactions. This feature is especially helpful to users if they desire to add additional information that will be of use to other individuals along the pre- determined routing path of transactions.

Once in the transaction, users will need to do the following in order to add a memo to a transaction:

1. Click the **Memos** tab.
2. Enter text (the memo) in the **Memo** text area.
3. Click the **Add** button.



WARNING: Memos will not be applied/saved to Banner. They are only stored with the transaction in the HR Front End.

Employee Record View

9.699008.AITS ITPC ECLS: Total FTE: 1.000 Base Salary: \$48,000.00 Total Salary: \$48,000.00

Full View:Transaction (1676:4340) JOBCHANGE (5461):Owner-Yes ();Not Completed:Editable:BioDemoAccess:JobAccess-[U22218.00], Stop: DEPT:Default:Initiate B U 9 AB 699 699008 (1676:4340)

DATE: 1/23/2009 View Limited ERV Timeline View

PROPOSED CHANGES

GENERAL INFO BIO / DEMO **1** MEMOS ATTACHMENTS AUDIT TRAIL

Transaction Memos

Memo	UserID	Date
2 3		01-23-2009

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

JOBS

Expand All

U22218-00: ECLS: TS ORG: 9-904001 TYPE: P FTE: 1.000 MTHLY: \$4,000.00 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

Figure 16: Adding Memos to a Transaction

Once the memo has been added, the changes will reflect as such in the Memos tab.



NOTE: The USERID and Date will automatically populate once the user clicks the Add button. This feature keeps a timestamp of when memos were added and by whom they were added.

Employee Record View

9.699008.AITS ITPC ECLS: BA Total FTE: 1.000 Base Salary: \$48,000.00 Total Salary: \$48,000.00

Full View:Transaction (1676:4340) JOBCHANGE (5461):Owner-Yes ();Not Completed:Editable:BioDemoAccess:JobAccess-[U22218.00], Stop: DEPT:Default:Initiate B U 9 AB 699 699008 (1676:4340)

DATE: 1/23/2009 View Limited ERV Timeline View

PROPOSED CHANGES

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

Transaction Memos

Memo	UserID	Date
Insert the memo here		1-23-2009
		01-23-2009

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

JOBS

Expand All

U22218-00: ECLS: TS ORG: 9-904001 TYPE: P FTE: 1.000 MTHLY: \$4,000.00 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Route Save Cancel Release Ownership Send To Send FYI Print Friendly View

Figure 17: Memos tab reflects memos added

Using the Send-To and Send FYI Features

At times, there are instances when a transaction needs to be sent to an individual or group of individuals that exist outside of the pre-determined routing path. When users perform a Send-To, they can send a transaction to:

- An Individual (**Person**)
- A Group of Individuals (**Group Inbox**)

Send-To Group Inbox

Upon clicking the **Send-To** button in the Employee Record View, users will:

1. Select the **Group Inbox** radio button
2. Select from one or more of the lists:
 - a. **COA**
 - b. **College**
 - c. **Department**
 - d. **Organization**
 - e. **Campus**
3. Click the **Send-To** button

A message will appear at the top of the screen indicating success performing the Send-To to the Group Inbox.

The screenshot shows the 'Send-To' form in the HR system. The form has a header bar with navigation links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below the header, the 'Send-To' section has two radio buttons: 'Person' and 'Group Inbox'. The 'Group Inbox' radio button is selected and highlighted with a yellow circle labeled '1'. Below the radio buttons is the 'Group Attributes' section, which contains five dropdown menus: 'COA' (set to '1 - University of Illinois - Urbana'), 'COLLEGE' (set to '* - All'), 'DEPARTMENT' (set to '* - All'), 'ORGANIZATION' (set to '* - All'), and 'CAMPUS' (set to 'U - UIUC Urbana / Champaign'). The 'CAMPUS' dropdown is highlighted with a yellow circle labeled '2'. At the bottom right of the form, there are two buttons: 'Back to ERV' and 'Send-To'. The 'Send-To' button is highlighted with a yellow circle labeled '3'.

Figure 18: Performing a Send-To to a Group Inbox

Send-To Person

Upon clicking the **Send-To** button in the Employee Record View, users will:

1. Select the **Person** radio button.
2. Enter a UIN or USER ID and/select from one or more of the lists:
 - a. **COA**
 - b. **College**
 - c. **Department**
 - d. **Organization**
 - e. **Campus**
3. Click the **Refresh List** button.

Send-To

Send-To: ☒ Person ☐ Group Inbox

Person Search

UIN: USERID:

COA: COLLEGE:

DEPARTMENT: ORGANIZATION:

CAMPUS:

Refresh List

Back to ERY Send-To

Figure 19: Performing a Send-To to an Individual

Once the screen refreshes with the list of individuals from which the user can choose:

4. Click the desired result (which will highlight the result).
5. Click the **Send-To** Button.

A message will appear at the top of the screen indicating success performing the Send-To to the individual.



NOTE: Clicking the Back to ERV button will take users back to the Employee Record View.

Send-To

Send-To TO: ☒ Person ☐ Group Inbox

Person Search

UIN: USERID:

COA: COLLEGE:

DEPARTMENT: ORGANIZATION:

CAMPUS:

[Refresh List](#)

UIN	Enterprise ID	Campus	COA	College	Dept	Org
000123456	dktrump	*	1	NB	593	*

[Back to ERV](#) [Send-To](#)

Figure 20: Send-To Results list

Send FYI - Group Inbox

Upon clicking the **Send FYI** button in the Employee Record View, users will:

1. Select the **Group Inbox** radio button
2. Select from one or more of the lists:
 - a. **COA**
 - b. **College**
 - c. **Department**
 - d. **Organization**
 - e. **Campus**
3. Click the **Send FYI** button

Figure 21: Send FYI - Group Inbox

Send FYI - Person

Upon clicking the **Send FYI** button in the Employee Record View, users will:

1. Select the **Person** radio button
2. Enter a UIN or USER ID and/select from one or more of the lists:
 - a. **COA**
 - b. **College**
 - c. **Department**
 - d. **Organization**
 - e. **Campus**
3. Click the **Refresh List** button

Send FYI

Send FYI ☒ Person ☐ Group Inbox

Person Search

UIN: USERID:

COA: COLLEGE:

DEPARTMENT: ORGANIZATION:

CAMPUS:

Refresh List

Back to ERV Send-FYI

Figure 22: Send FYI - Individual

Once the screen refreshes with the list of individuals from which the user can choose:

4. Click the desired result (which will highlight the result)
5. Click the **Send FYI** Button

A message will appear at the top of the screen indicating success performing the Send FYI to the individual.

Send FYI

Send FYI ☒ Person ☐ Group Inbox

Person Search

UIN: USERID:

COA: COLLEGE:

DEPARTMENT: ORGANIZATION:

CAMPUS:

Refresh List

UIN	Enterprise ID	Campus	COA	College	Dept	Org
000123456	dktrump	*	1	NB	593	*

Back to ERV Send-To

Figure 23: Send FYI – Selecting Individual

Performing an Employee Search

There are several ways that users can locate individual employee records in the HR Front End. Users can locate an employee record by:

1. Entering the employee UIN in the **UIN Quick Search** feature, **OR**
2. Clicking the **Employee Search** link in the menu bar



HINT: Entering a UIN in the UIN Quick Search will take users directly to the Employee Record View.

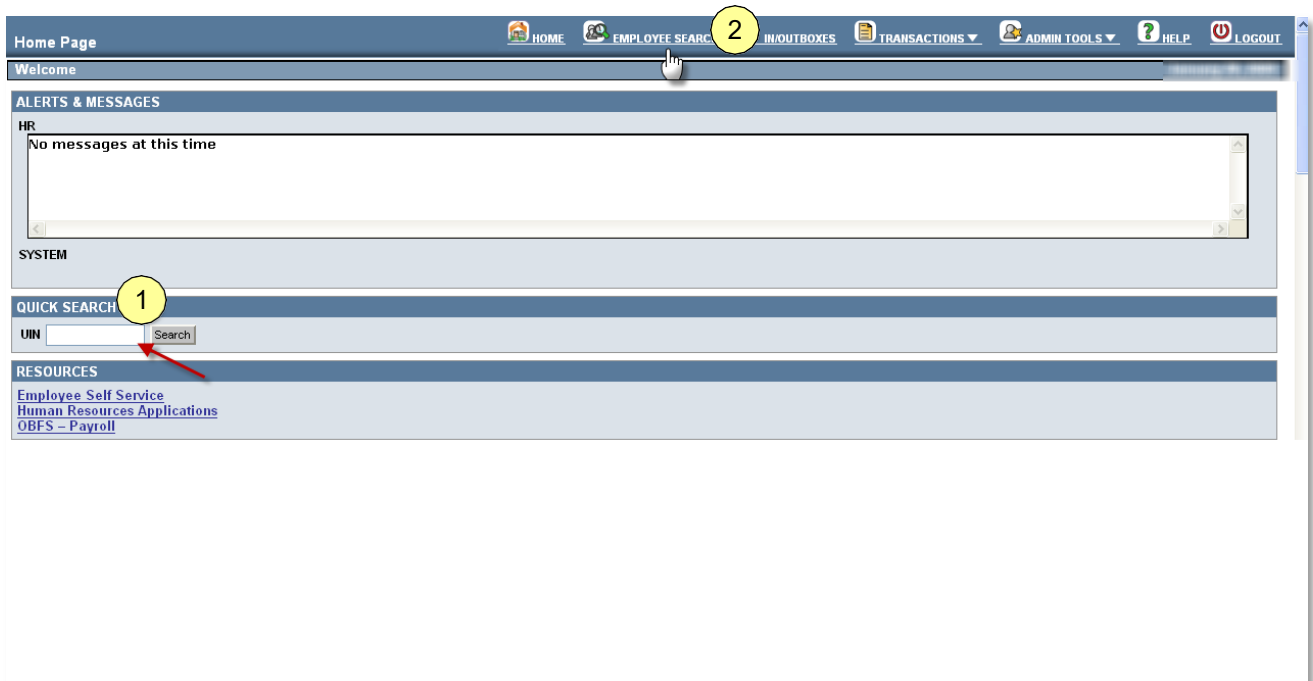


Figure 24: Searching for an Employee Record

Employee Search Feature

If the user clicks the Employee Search link in the menu bar, the screen will refresh and they will be taken to the Employee Search feature. This feature allows users to be broad or specific in their search. A user can search several ways for an employee:

1. Users can: Enter information in the text areas:

- UIN - University Identification Number
 - Last Name – employee's last name-
 - First Name – employee's first name
 - USERID – employee's user id
 - SSN – employee's social security number



NOTE: If you enter only a name (First Name and Last Name) , the application will find the results.

2. Users can also filter the search by the lists provided:

- a. COA (Chart of Accounts)
- b. College
- c. Department
- d. Organizations
- e. Campus
- f. Employee Group

Figure 25: Employee Search Feature

- Once the search criteria have been entered, users will click the **Search** button.



NOTE: Checking the **Include Terminated Employees** box will include terminated employees to populate the employee search results. Clicking the **Reset** button will reset the search criteria to the system default settings.

- Once the screen refreshes with the search results, highlight the desired results and then click the **Select** button.

Employee Search

UIN: LAST NAME: FIRST NAME: USERID: SSN:

COA: COLLEGE:

DEPARTMENT: ORGANIZATION:

CAMPUS: EMPLOYEE GROUP:

☐ INCLUDE TERMINATED EMPLOYEES

Search Reset

Select Query returned 1 rows.

UIN	Last Name	First Name	E-Class	Emp Status	Home ORG
000123456	Trump	Donald	BA - Acad/Pro 12mth Ben Elig	A	S-9-699008 - AITS.ITPC

Figure 26: Employee Search Results Screen

- Once the screen refreshes, users will be taken to the Employee Record View.

User Preferences

User Preferences in the HR Front End allow users to customize certain settings. There are four areas in the HR Front End that allow users to customize settings. These areas are:

- Employee Search
- Employee Search
- Columns In/Outboxes
- In/Outbox Columns

In order to access User Preferences, users will:

1. Hover their mouse over **Admin Tools** in the menu bar
2. Click **User Preferences**



Figure 27: Selecting User Preferences from Home Page

Once the screen refreshes, users will be taken to the User Preferences screen. From this point, they can select from the list provided.

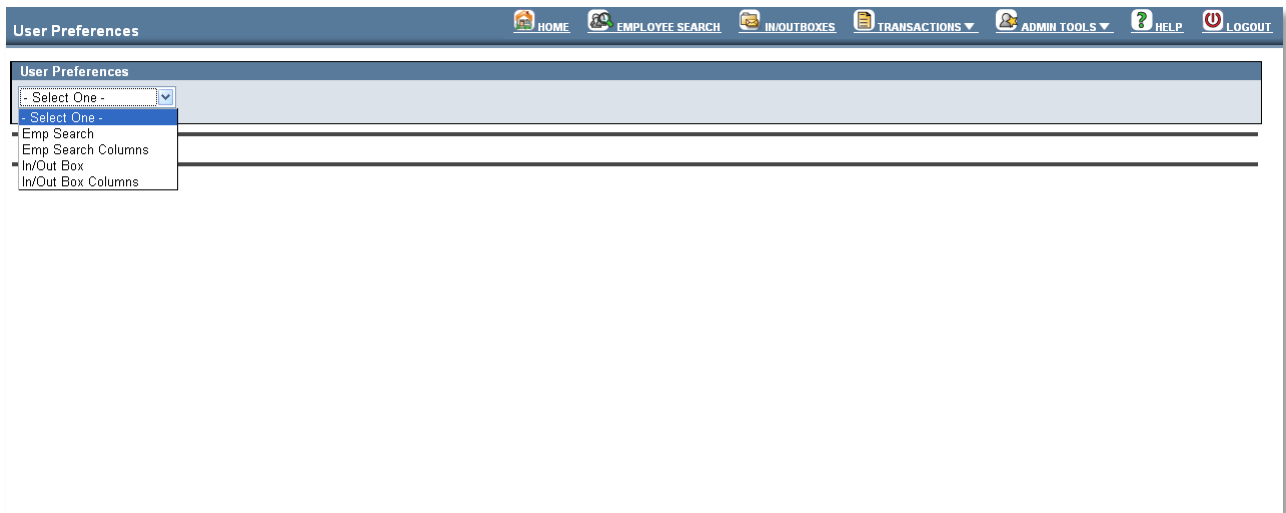


Figure 28: Selecting from the User Preferences List

User Preferences – Employee Search

If the Employee Search option is selected, users will have several fields that they are able to customize for their Employee Search settings:

- **COA** - (Chart of Accounts) Selecting a COA will filter the college drop down to be all colleges in the selected chart.
- **College** – This drop down control contains all the colleges in the selected COA above. The selected college will filter the Department drop down.
- **Department** – This dropdown control contains all departments in the selected college above. The selected department will filter the Organization drop down.
- **Organization** – This drop down control contains all the organizations in the selected department above.
- **Employee Group** – This drop down control contains all employee groups. Select the employee group that you want to set as your default search criteria.
- **Display Terminated** – If the check box is selected, it will always display terminated employees.
- **Max Rows** – Maximum amount of rows that can be returned.
- **Campus** – This drop down control contains all the campuses.
- **Default View** – Employee Record View (ERV) or Timeline after selecting record from Employee Search.
- **Refresh Always** – If box is checked, Employee Search will always refresh search results when entering screen.

Label	Description	Setting
COA	Select the COA (Chart of Accounts) that you want to set as your default search criteria. The selected COA will filter the college drop down to be all colleges in the selected chart.	1 - University of Illinois - Urbana
COLLEGE	This drop down control contains all the colleges in the selected COA above. Select the college that you want to set as your default search criteria. The selected college will filter the Department drop down.	* - All
DEPARTMENT	This drop down control contains all the departments in the selected college above. Select the department that you want to set as your default search criteria. The selected department will filter the Organization drop down.	* - All
ORGANIZATION	This drop down control contains all the organizations in the selected department above. Select the organization that you want to set as your default search criteria.	* - All
EMPLOYEE GROUP	This drop down control contains all employee groups. Select the employee group that you want to set as your default search criteria.	* - All
DISPLAY TERMINATED	Select the checkbox if you want the search results to always display terminated employees.	<input checked="" type="checkbox"/>
MAX ROWS	Max rows that can be returned.	250
CAMPUS	This drop down control contains all the campuses. Select the campus that you want to set as your default search criteria.	U - UIUC Urbana / Champaign
DEFAULT VIEW	ERV or Timeline after employee search.	ERV
REFRESH ALWAYS	Always refresh search results when entering screen.	<input type="checkbox"/>

Save Cancel Restore Defaults

Figure 29: User Preferences – Employee Search

Once the presets have been selected, users can:

- Click the **Save** button – which will save the settings they have selected, or
- Click the **Cancel** button – which will cancel the changes that they have made, or Click the **Restore Defaults** button – which will restore to the
- system default settings.

Once the changes have been made, users can view the changes by navigating to the Employee Search feature.

User Preferences – Employee Search Columns

If the Employee Search Columns option is selected, the screen will refresh and users will be able to choose which columns will be displayed in the Employee Search.

The **Available Columns** contains columns that are not currently displayed in the Employee Search. The **Selected Columns** contains columns that are currently being displayed.

In order to move items from **Available Columns** to **Selected Columns**:

1. Click the item(s) under **Available Columns** to be moved (to select more than one item, hold the CTRL key on the keyboard when selecting the items).
2. Click the arrow button to move the items
3. Once the items have been moved from **Available Columns** to **Selected Columns**, the up and down directional arrows can be used to order the items in Selected Columns accordingly.
4. Click the:
 - a. **Save** button to save changes that have been made
 - b. **Cancel** button to cancel the changes that have been made
 - c. **Restore Defaults** button to restore to the system default settings



NOTE: The UIN and Last Name cannot be moved from the selected columns.

User Preferences

Emp Search Columns

AVAILABLE COLUMNS

- Middle
- User ID
- Last 4 SSN
- Trans

SELECTED COLUMNS

- UIN
- Last Name
- First Name
- E-Class
- Emp Status
- Home ORG

UIN	Last Name	First Name	E-Class	Emp Status	Home ORG
123456789	Doe	John	EC - EClass	A	U-9-904001 - AVP Human Resources/Shared
987654321	Smith	Jane	EC - EClass	A	U-9-699002 - AITS ADSD
123454321	Johnson	Mike	EC - EClass	A	U-9-615000 - Presidents Office

Save Cancel Restore Defaults

Figure 30: User Preferences – Employee Search Columns

User Preferences – In/Outbox

The In/Outboxes, over time, will begin to populate with a great deal of transactions. As users scroll down the list of transactions, they will be able to apply a particular setting that allows the column headers to be locked in place when the In/Outboxes are accessed.

The screenshot shows the 'In/Outboxes' application interface. At the top, there is a navigation bar with links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, the 'Transactions' section is active, showing radio buttons for MY INBOX, GROUP INBOXES, MY OUTBOX, and GROUP OUTBOXES. A 'PERSONAL PRESET IN USE' dropdown is set to '- None -'. A 'CRITERIA FOR LISTED TRANSACTIONS' section includes filters for Route Stop Role, E-Group, College, Route Stop Level, Campus, Department, Transaction Type, COA, and Organization. Below the filters are buttons for Refresh List, Take Ownership, Release Ownership, and Select. The main area displays a table of transactions with the following column headers: Select, Tran ID, Stop ID, Route Stop, Tran Type, UIN, Last Name, First Name, Empl Group, Home Org, Owned By, Completed, and Tran Enabled Date. The table contains 15 rows of transaction data.

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed	Tran Enabled Date
<input type="checkbox"/>	3	4	DEPT:Default:Initiate A G-9-ZZ-110-110004 (3:4)	NEWHIRE			Qanek	A	G-9-110004		No	
<input type="checkbox"/>	5	8	DEPT:Default:Initiate A S-9-AB-699-699000 (5:8)	NEWHIRE			Qalgt	A	S-9-699000		No	
<input type="checkbox"/>	7	16	DEPT:Default:Initiate A U-1-KL-698-698001 (7:16)	JOBEENDDATE			Elizabeth	A	U-1-698001		No	
<input type="checkbox"/>	8	405	CAMPUS:Default:Apply C U-1-*.*. (8:405)	NEWHIRE			Applyerr	C	U-1-580000		No	
<input type="checkbox"/>	10	22	DEPT:Default:Initiate A S-9-AZ-862-862000 (10:22)	NEWHIRE			Qatlg	A	S-9-862000		No	
<input type="checkbox"/>	11	28	System Send-To Stop: COLLEGE:Default:Review B S-4-PE-*. (11:28)	EGC/ECC-JOBEENDDATE			Ronald	B	S-4-441000		No	
<input type="checkbox"/>	12	25	DEPT:Default:Apply B C-9-AB-699-*. (12:25)	PCM				B	C-9-699002		No	
<input type="checkbox"/>	13	27	DEPT:Default:Initiate A S-9-AF-879-879003 (13:27)	NEWHIRE			Qaxvl	A	S-9-879003		No	
<input type="checkbox"/>	14	29	DEPT:Default:Initiate A U-9-AM-637-637002 (14:29)	NEWHIRE			Qagcb	A	U-9-637002		No	
<input type="checkbox"/>	17	37	CAMPUS:Default:Apply E U-1-*.*. (17:37)	ERC			Adrienne	E	U-1-262007		No	
<input type="checkbox"/>	18	38	DEPT:Default:Initiate A U-9-AH-512-512009 (18:38)	NEWHIRE			Qapuq	A	U-9-512009		No	
<input type="checkbox"/>	21	69	CAMPUS:Default:Apply B U-1-*.*. (21:69)	ERC			Dede	B	U-1-979000		No	

Figure 31: In/Outbox Column Headers

When the In/Outbox option is selected under User Preferences, the screen will refresh and users will be able to indicate as to whether or not they want fixed headers on the In/Outboxes. In order to do this, users will:

1. Check/uncheck the box under the **Setting** column to indicate whether or not they want fixed headers
2. Once the user has made the selection, they will:
 - a. Click the **Save** button to save the changes made
 - b. Click the **Cancel** button to cancel the changes made
 - c. Click the **Restore Defaults** button to restore to the system default settings

Label	Description	Setting
FIXED HEADER	Select the checkbox if you want fixed headers on the inbox screen. This will slow down the display of the Inbox screen.	<input type="checkbox"/>

Figure 32: User Preferences – In/Outbox

User Preferences – In/Outbox Columns

If the In/Outbox Columns option is selected, the screen will refresh and users will be able to choose which columns will be displayed in the In/Outboxes.

- The **Available Columns** contains columns that are not currently displayed.
- The **Selected Columns** contains columns that are currently being displayed.

In order to move items from **Available Columns** to **Selected Columns**:

1. Click the item(s) under **Available Columns** to be moved (to select more than one item, hold the CTRL key on the keyboard when selecting the items).
2. Click the arrow button to move the items
3. Once the items have been moved from **Available Columns** to **Selected Columns**, the up and down directional arrows can be used to order the items in Selected Columns accordingly.
4. Click the:
 - a. **Save** button to save changes that have been made
 - b. **Cancel** button to cancel the changes that have been made
 - c. **Restore Defaults** button to restore to the system default settings



NOTE: The Select, Tran ID, Stop ID, Route Stop, Tran Type, and UIN cannot be moved from the Selected Columns.

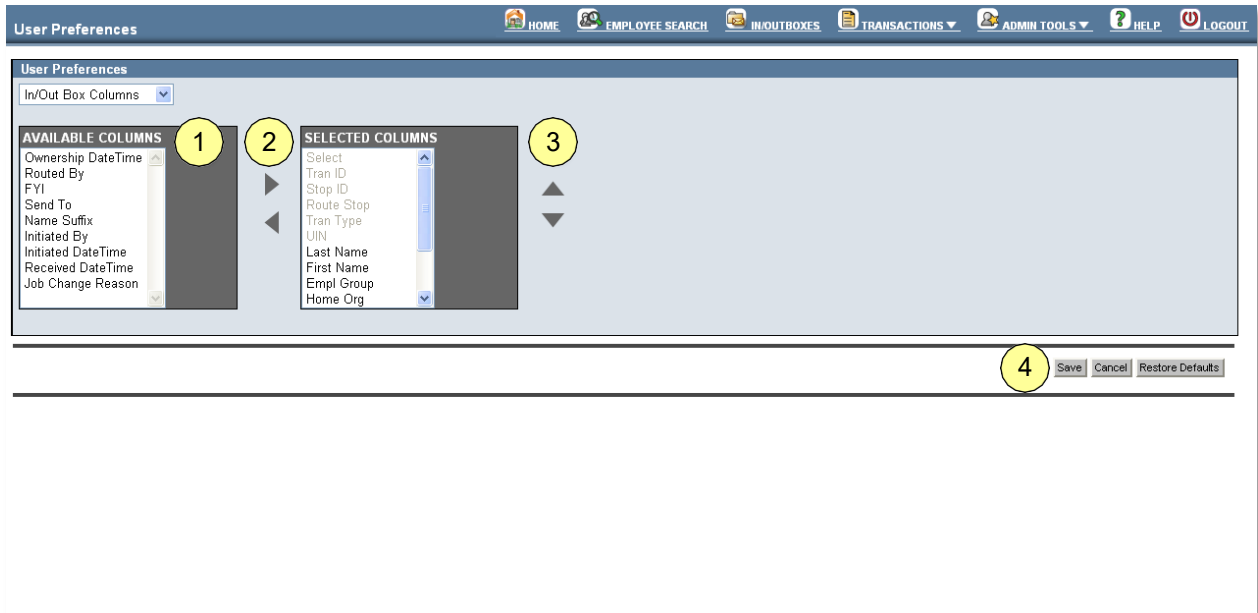


Figure 33: User Preferences – In/Outbox Columns

Using the Online Help Feature

The **Online Help** feature houses information pertaining to the many functions of the HR Front End. The **Online Help** feature is accessible to users by simply clicking the **Help** link in the navigation menu.

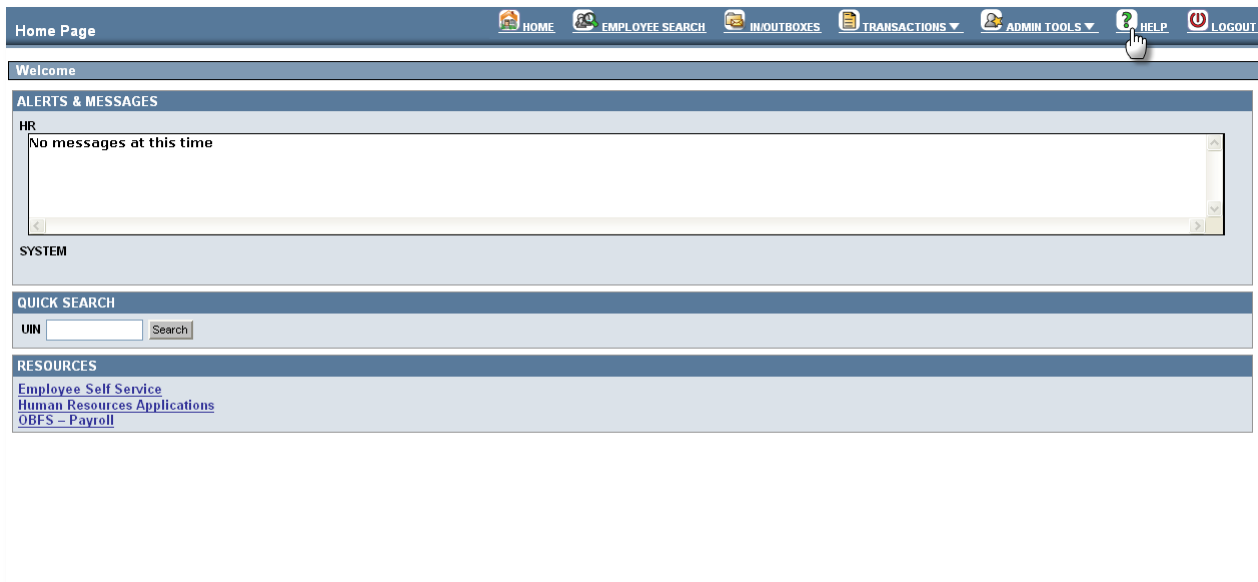


Figure 34: Accessing Online Help

Once the **Help** link is clicked the **Online Help** tool appears. Online Help is divided into three sections:

- a. Navigation Pane
- b. Toolbar
- c. Content Pane

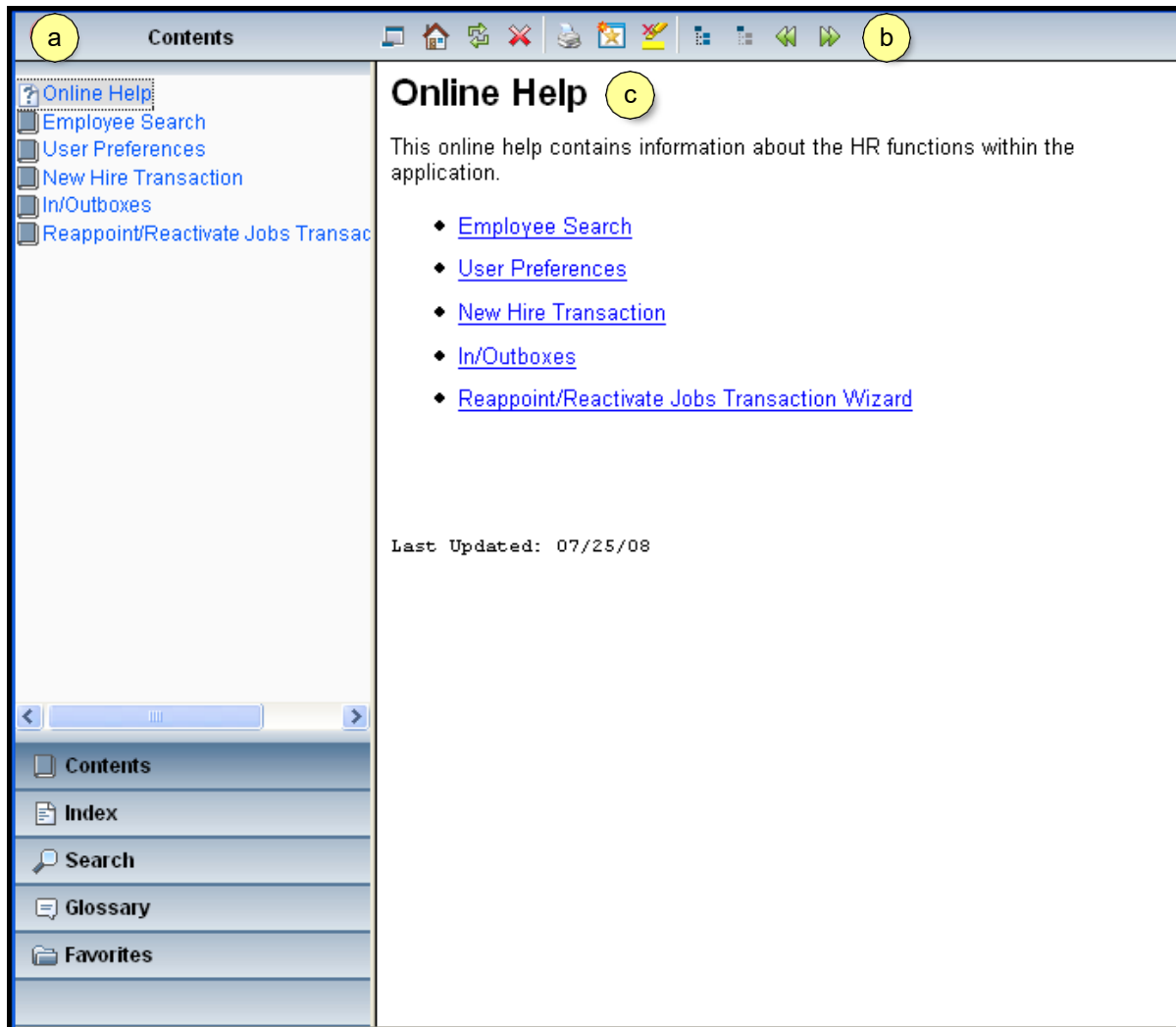


Figure 35: Online Help Sections

Online Help - Navigation Pane

The **Navigation Pane** allows users to navigate to and from different sections of the Online Help feature. The **Navigation Pane** contains:

- a. **Contents** – displays contents that users will encounter in the HR Front End
- b. **Index** – provides a topical index to content in the HR Front End
- c. **Search** – allows users to search for HR Front End content within the Online Help Tool
- d. **Glossary** – provides a glossary of terms that are encountered in the HR Front End
- e. **Favorites** – houses the item(s) that a user declares as a favorite for quick reference

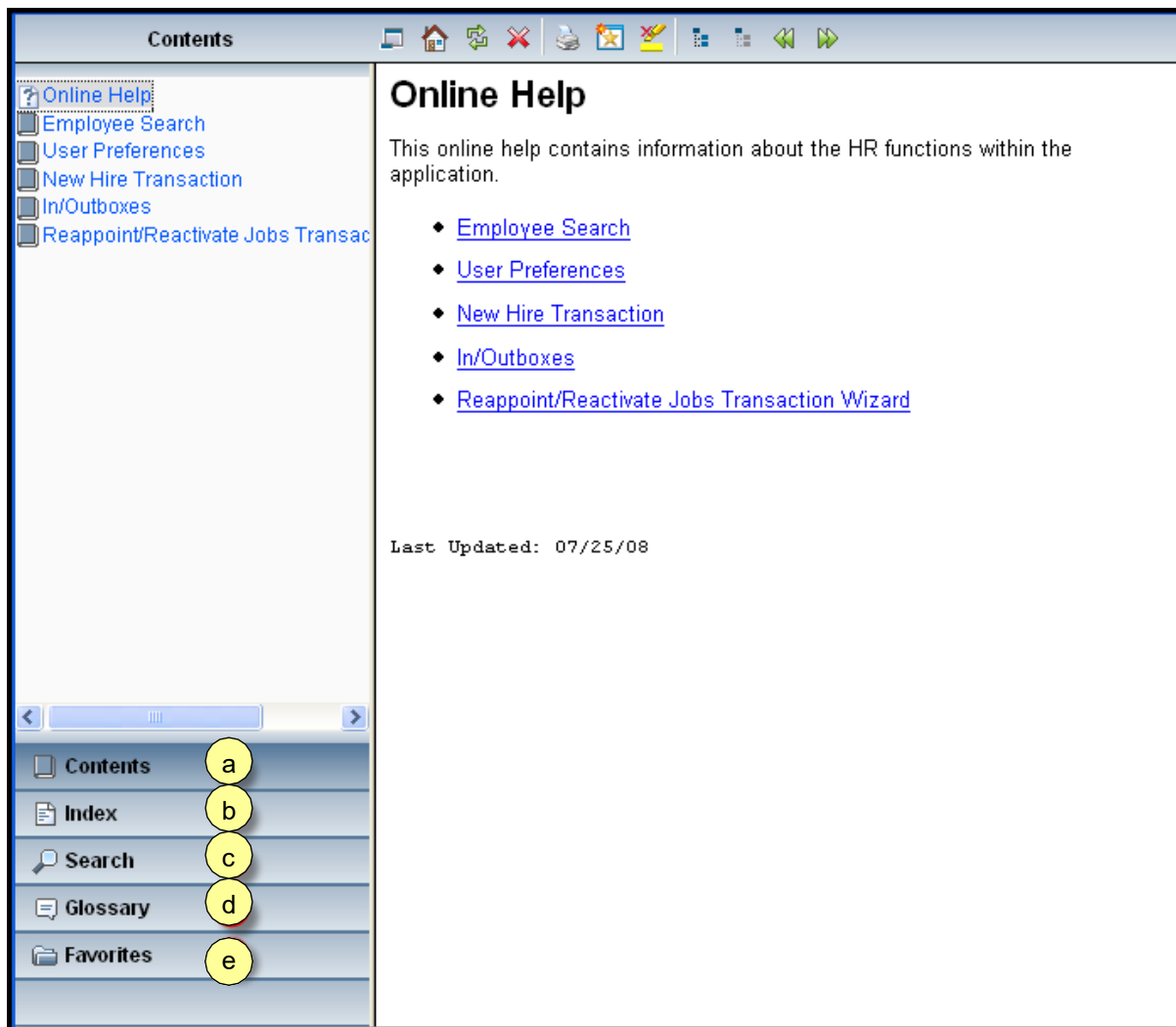


Figure 36: Navigation Pane

Online Help - Navigation Pane - Contents

The **Contents** section in the Navigation Pane contains information pertaining to the section in the HR Front End that is being accessed. The contents will be listed in the left-hand pane. Once the user clicks on a particular content item, it will be displayed in detail in the right-hand pane.

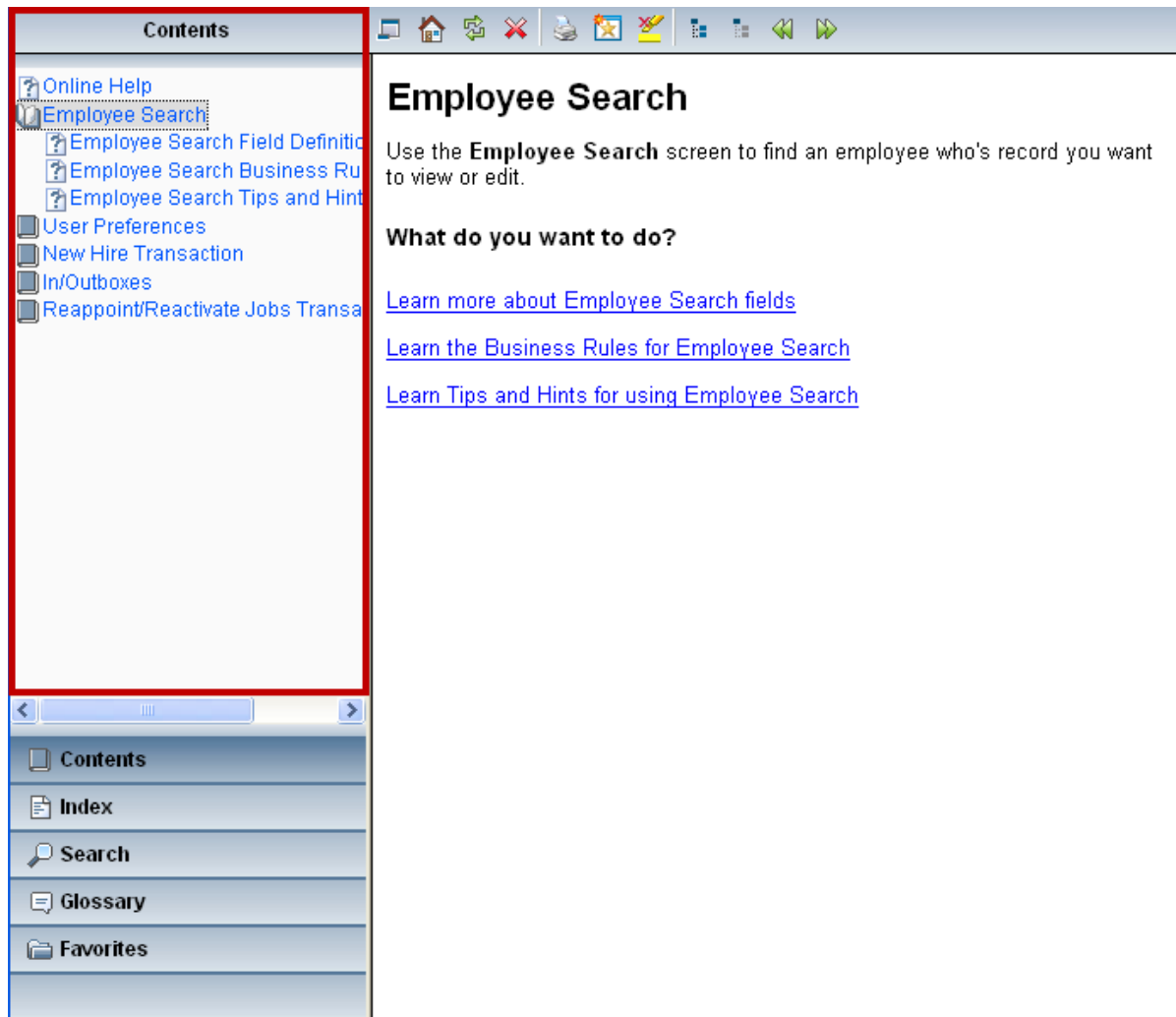


Figure 37: Navigation Pane - Contents

Online Help - Navigation Pane - Index

The **Index** section contains a substantial list of topics that pertain to the HR Front End application. If the user needs to search for a particular topic, they may do so by typing the term(s) in the text box to search for that topic within the Index feature. Once the topic of choice has been located and selected in the left-hand pane, the topic(s) is displayed in detail in the right-hand pane.

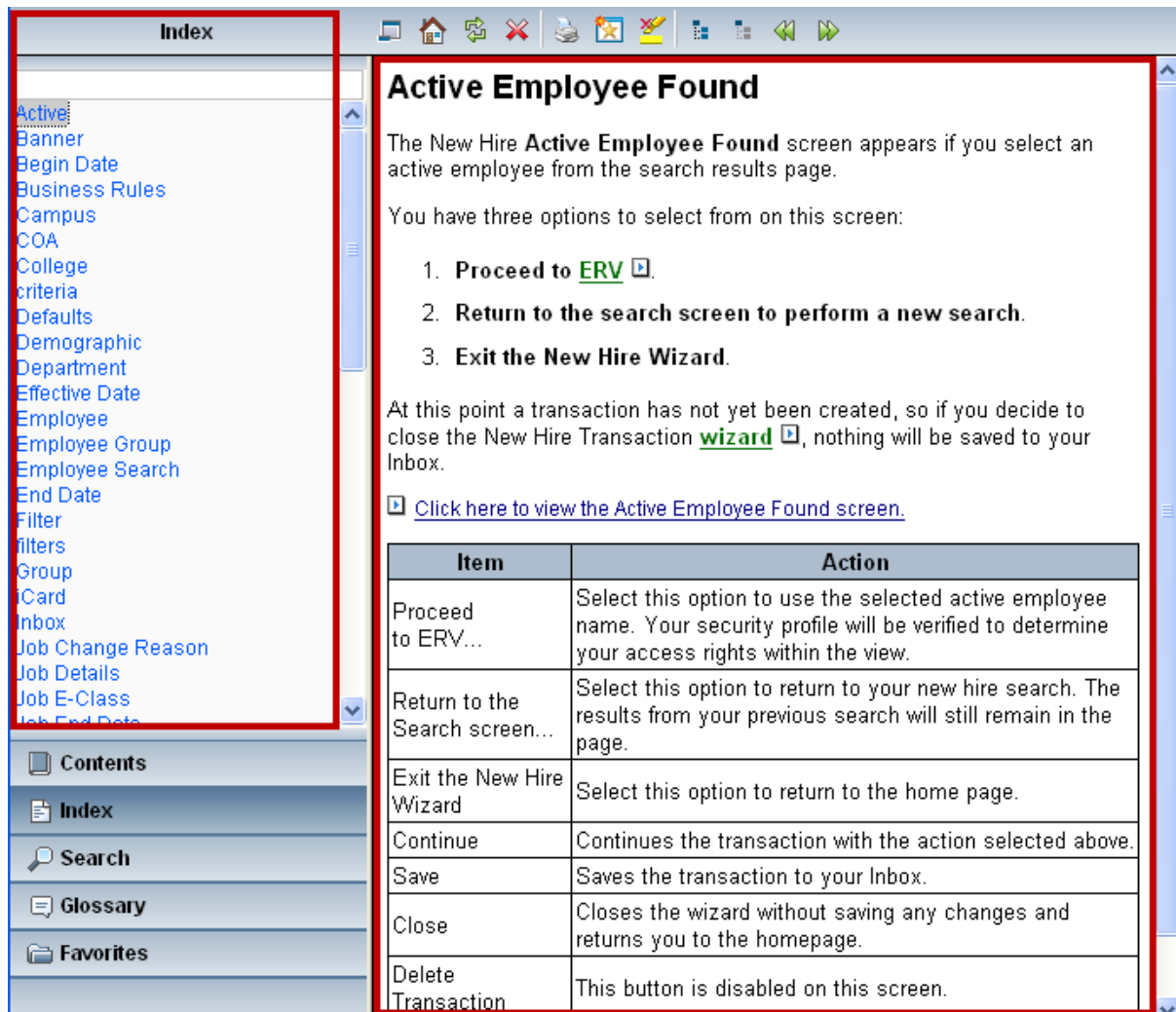


Figure 38: Navigation Pane - Index

Online Help - Navigation Pane - Search

The **Search** section allows users to search for a specific topic(s) pertaining to the HR Front End application. Once the user enters the search criteria into the text box and clicks the search button, the results will populate in the left-hand pane. The items listed will be ranked by relevance. To access any of these topics in detail, the user will click the item in order to populate the right-hand pane with details pertaining to the topic(s) selected.

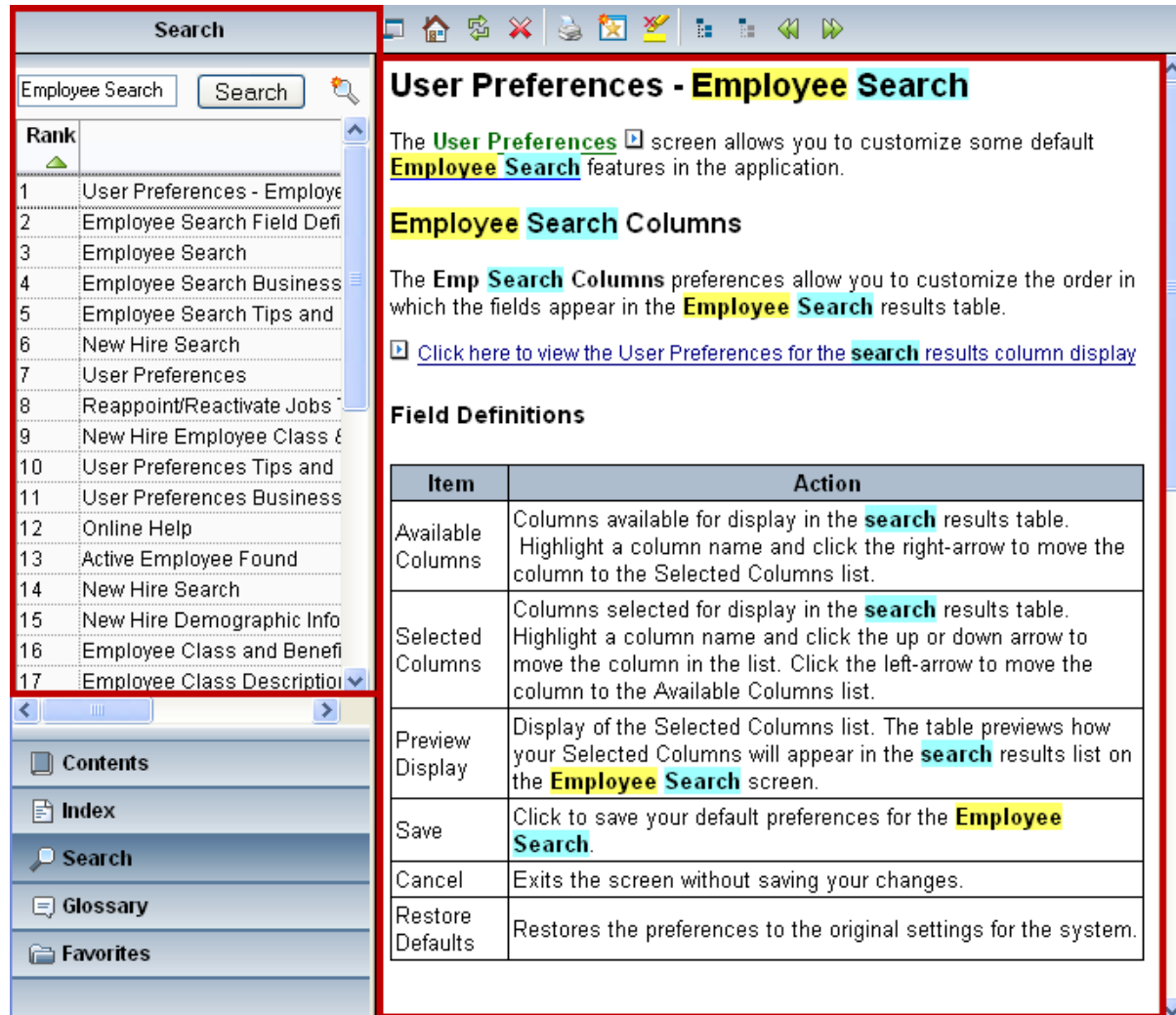


Figure 39: Navigation Pane - Search

Online Help - Navigation Pane - Glossary

The **Glossary** section contains terms that users will encounter in the HR Front End application and their definitions. Unlike previous features mentioned. The terms selected in the glossary will remain contained in the left-hand pane of the Online Help feature.

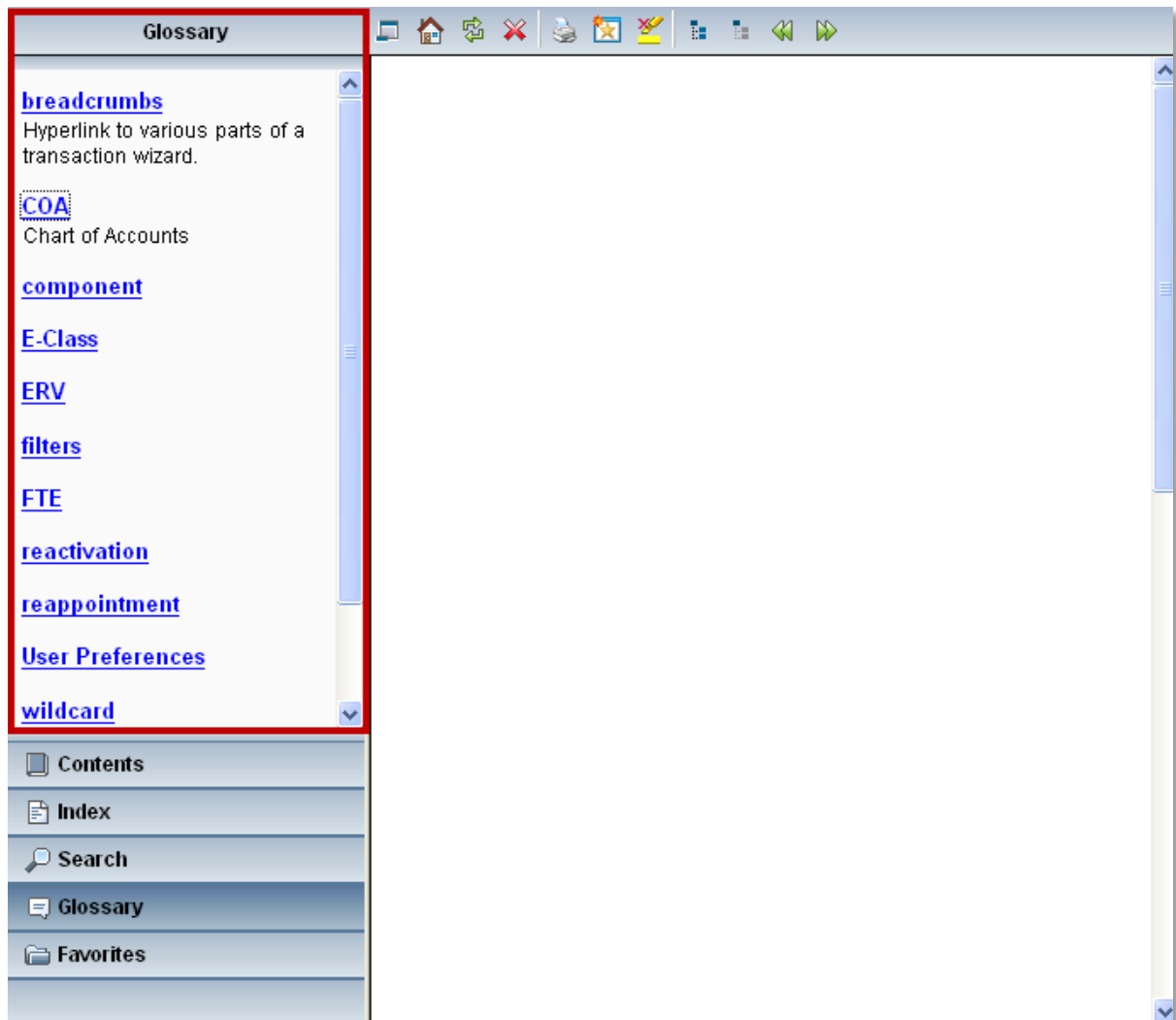


Figure 40: Navigation Pane - Index

Online Help - Navigation Pane - Favorites

The **Favorites** section allows users to view any searches or topics that they have marked as favorites while using the Online Help tool. In order to delete a favorite topic or favorite search, users simply need to check to the box next to the topic/search that they wish to delete, and then click the red 'X'.

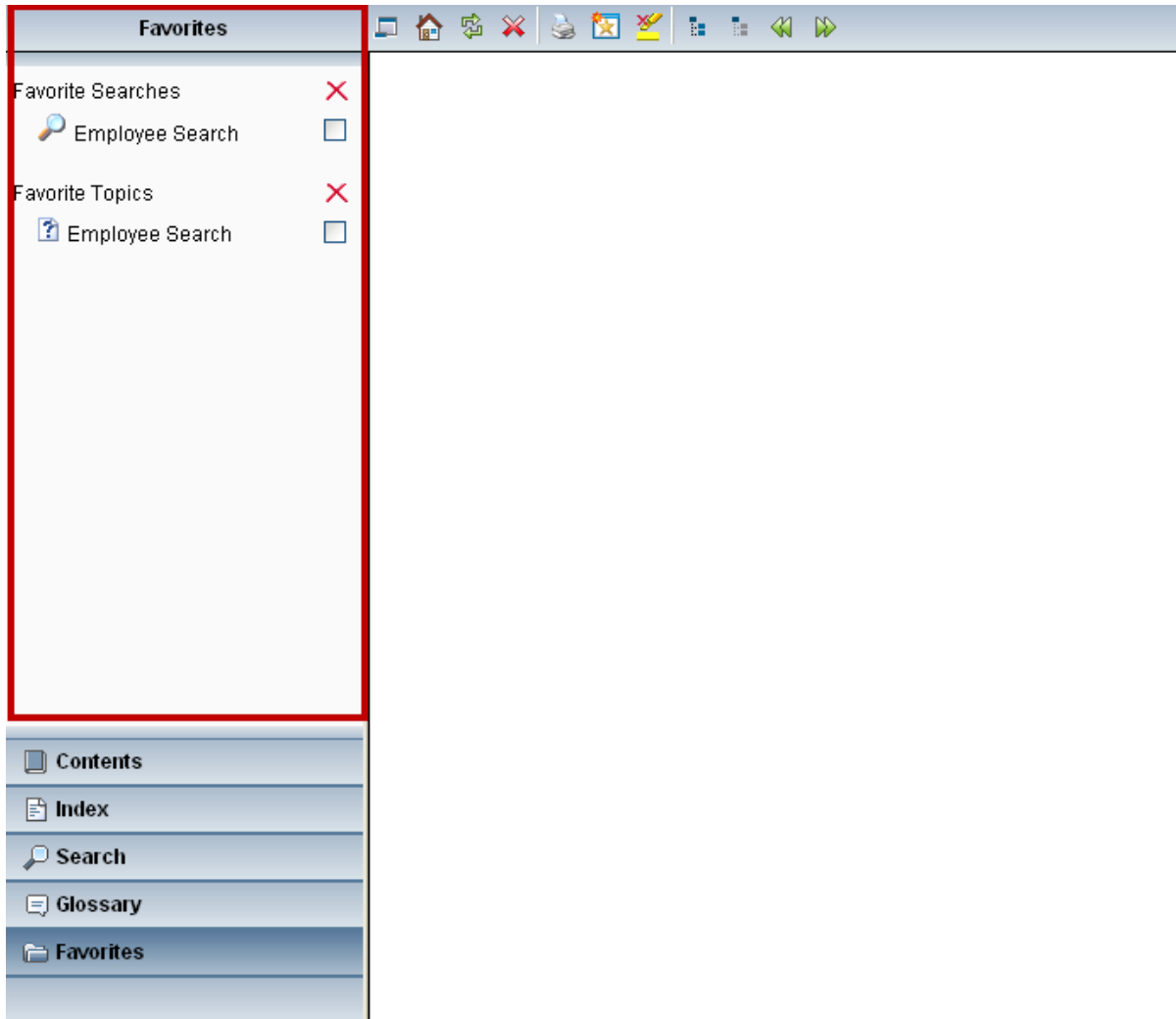


Figure 41: Navigation Pane - Favorites

Online Help – Toolbar

The **Toolbar** provides additional tools for the user's assistance while using the Online Help tool. Users will encounter the following items on the toolbar:

- a. **Hide/Show Navigation Area** – clicking this icon will either hide or show the navigation area
- b. **Go to Home Page** – clicking this icon will take users to the home page in Online Help
- c. **Refresh** – clicking this icon will refresh the contents displayed
- d. **Stop** – clicking this icon will stop the action that is currently being performed
- e. **Print** – clicking this icon will allow users to print the information that is being displayed
- f. **Add Topic to Favorites** – clicking this icon will add the displayed topic to the favorites section
- g. **Add/Remove Search Highlighting** - clicking this icon will add or remove search highlighting (which highlights a specific term(s) in the Online Help tool)
- h. **Show Expanding Text Effects** – clicking this icon will display
- i. **Hide Expanding Text Effects** – clicking this icon will display
- j. **Back** – clicking this icon will take users back one screen
- k. **Forward** – clicking this icon will take users forward one screen

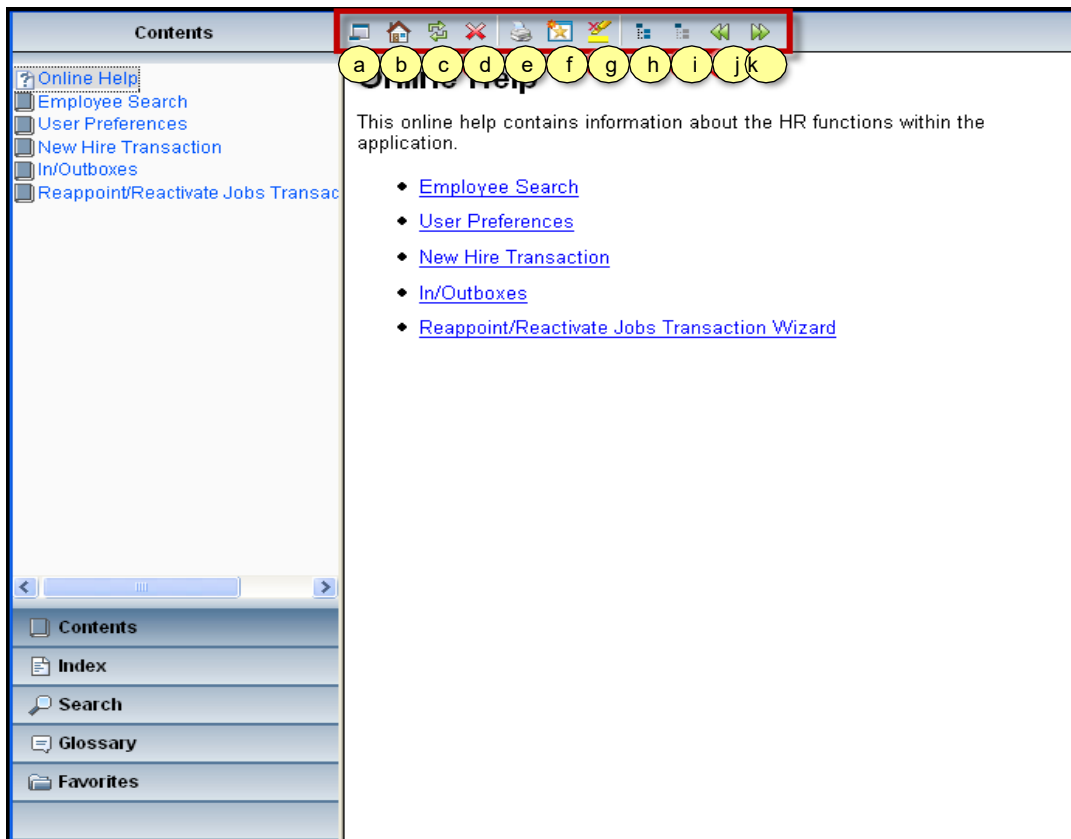


Figure 42: Online Help - Toolbar

Online Help – Content Pane

The **Content Pane** will populate with the selected item(s) that the user selected in the Navigation Pane. This content will change as the user changes the content chosen in the Navigation Pane.

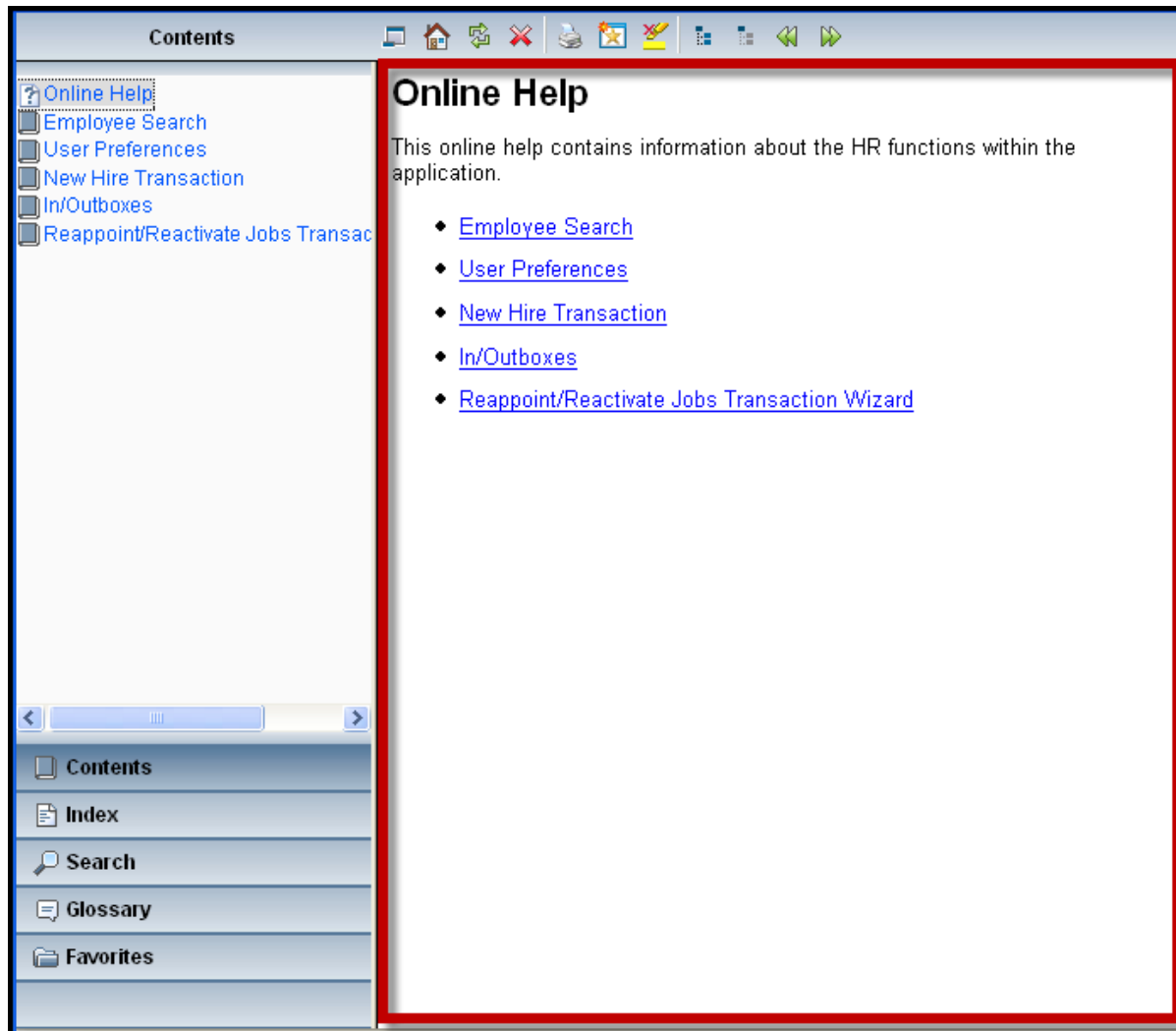


Figure 43: Online Help – Content Pane

Appendix – Doc Attach: Acceptable Doc Types

By default, files not natively supported by WX (for example, files other than TIFF, Windows bitmaps, TGA, RTF, JPEG, GIF, PCX, and DCX) are imported as foreign files. WX pages that have been imported as foreign files are represented in WX by an icon, and require a third-party viewer (or activation of foreign file export using the KeyView Viewer) to display the contents of the page.

For example, if a user adds a Microsoft Word document to WX as a new document, a Word icon would appear as the WX page. Users would then double-click the icon to launch Microsoft Word and to view the document. PDF support is available with WX, but users must download the WebXtender Adobe Component to view PDF documents in their native format.



Note:

- If you are having trouble viewing a document using Acrobat 6.0, try opening Acrobat 6.0 manually once before retrieving the document using WX. By default, text pages are imported as foreign files.
- WX does not support progressive JPEGs. Importing a progressive JPEG into WX will result in the file being imported as a foreign file.

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