

# Employee Search and Online Help HR FRONT END TRAINING HOW-TO GUIDE



## Acknowledgements

Portions of this manual are based on Ellucian Banner System, Release 9.3.0.1.

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## Course Information

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Version: 1.0

### **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 Employee Search and Online Help Quick View

1

- Using the UIN Quick Search

2

- Employee Search Screen

3

- Employee Search User Preferences

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## ***Introduction***

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This training guide covers the Employee Search feature of the HR Front End system, and setting Employee Search User Preferences. Employee Search is a tool used to locate employee records using a variety of criteria, such as the UIN, Name, or College of the employee.

## ***Conventions Used in this Guide***

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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.

## **Locating an Employee Record – UIN Quick Search**

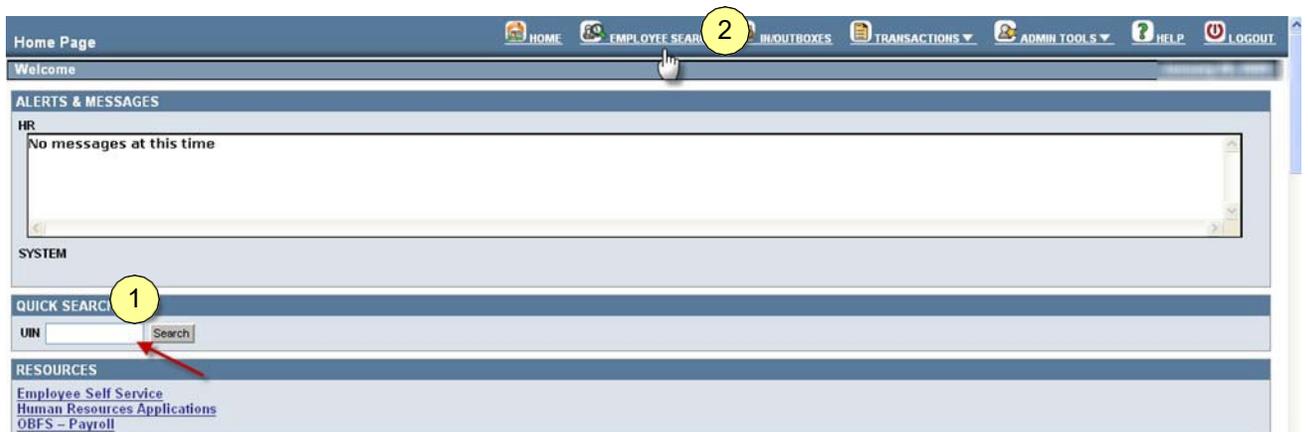
There are several ways that users can locate individual employee records in the HR Front End. Users can locate an employee record by:

1. Click **HOME** link on the Menu Bar.
2. Entering the employee UIN in the **UIN Quick Search** feature
3. Click **Search**

*Employee Record View is displayed.*



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



**Figure 1: Searching for an Employee**

## **Locating an Employee Record – Employee Search**

Use the Employee Search screen to locate employee records using the UIN or other search criteria, such as Name, User ID, or Home Org information.

1. Click **Employee Search** from the Menu Bar.
2. Enter the desired search criteria in the appropriate fields.
  - 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
  - COA - Chart of Account
  - College
  - Department
  - Organizations
  - Campus
  - Employee Group
3. Check / Uncheck the **Include Terminated Employees** box.
4. Click **Search**

*Search results are displayed.*

**Figure 2: Employee Search**



**NOTE:** When using the Employee Search, you must specify

- COA and College **OR**
- UIN, Last Name, First Name, UserID, and/or SSN

If a value is entered in the UIN field, the system will only search for the UIN.



**HINT: To erase the search criteria and results and begin a new search, click Reset.**

The screenshot shows the 'Employee Search' web application. At the top, there is a navigation bar with links for HOME, EMPLOYEE SEARCH, INBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this is the search form with the following fields and options:

- UIN: [text input]
- LAST NAME: [text input]
- FIRST NAME: [text input]
- USERID: [text input]
- SSN: [text input]
- COA: \* - All (dropdown)
- COLLEGE: \* - All (dropdown)
- DEPARTMENT: \* - All (dropdown)
- ORGANIZATION: \* - All (dropdown)
- CAMPUS: \* - All (dropdown)
- EMPLOYEE GROUP: \* - All (dropdown)
- INCLUDE TERMINATED EMPLOYEES
- Buttons: Search, Reset

Below the form, a message states 'Query returned 1 rows.' A table with the following data is displayed:

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

A red arrow points to the UIN '000123456' in the first row of the table. A 'Select' button is located to the left of the table.

**Figure 3: Employee Search Results Screen**

5. Click on the desired row, then click **Select**.  
*Employee Record is displayed for desired employee.*

## **Employee Search User Preferences**

User Preferences in the HR Front End allow users to customize certain settings as they relate to Employee Search. This section will cover setting user preferences for Employee Search Defaults and Employee Search Columns.



**NOTE:** For instructions on User Preferences for In/Outboxes, see the In/Outbox guide.

### **Setting User Preferences for Employee Search**

1. Select **Admin Tools** in the menu bar

2. Click **User Preferences**

*User Preferences window is displayed.*

3. Select Employee Search

*Employee Search User Preferences are displayed.*



**Figure 4: User Preferences- Employee Search**

4. Select the default value for each of the following fields:

- **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 drop down control contains all the 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.

User Preferences

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

Emp Search

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.	2 - University of Illinois - Chicago
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.	C - UIC Chicago
DEFAULT VIEW	ERV or Timeline after employee search.	ERV

Save Cancel Restore Defaults

**Figure 5: 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

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

Emp Search Columns

**AVAILABLE COLUMNS**

Middle  
User ID  
Last 4 SSN  
Trans

1

2

**SELECTED COLUMNS**

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

3

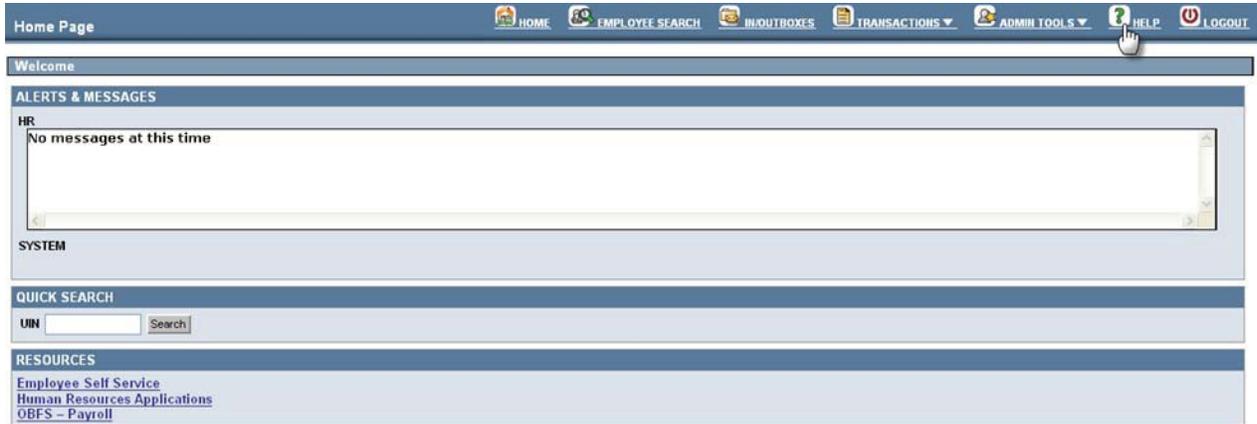
UIN	Last Name	First Name	E-Class	Emp Status	Home ORG
123456789	Doe	John	EC - EClass	A	U-9-904001 - AVP Human Resources/Shared
987654321	Smith	Jane	EC - EClass	A	U-9-699002 - AITS ADSD
123454321	Johnson	Mike	EC - EClass	A	U-9-615000 - Presidents Office

4
Save
Cancel
Restore Defaults

**Figure 6: User Preferences – Employee Search Columns**

## ***Using the Online Help Feature***

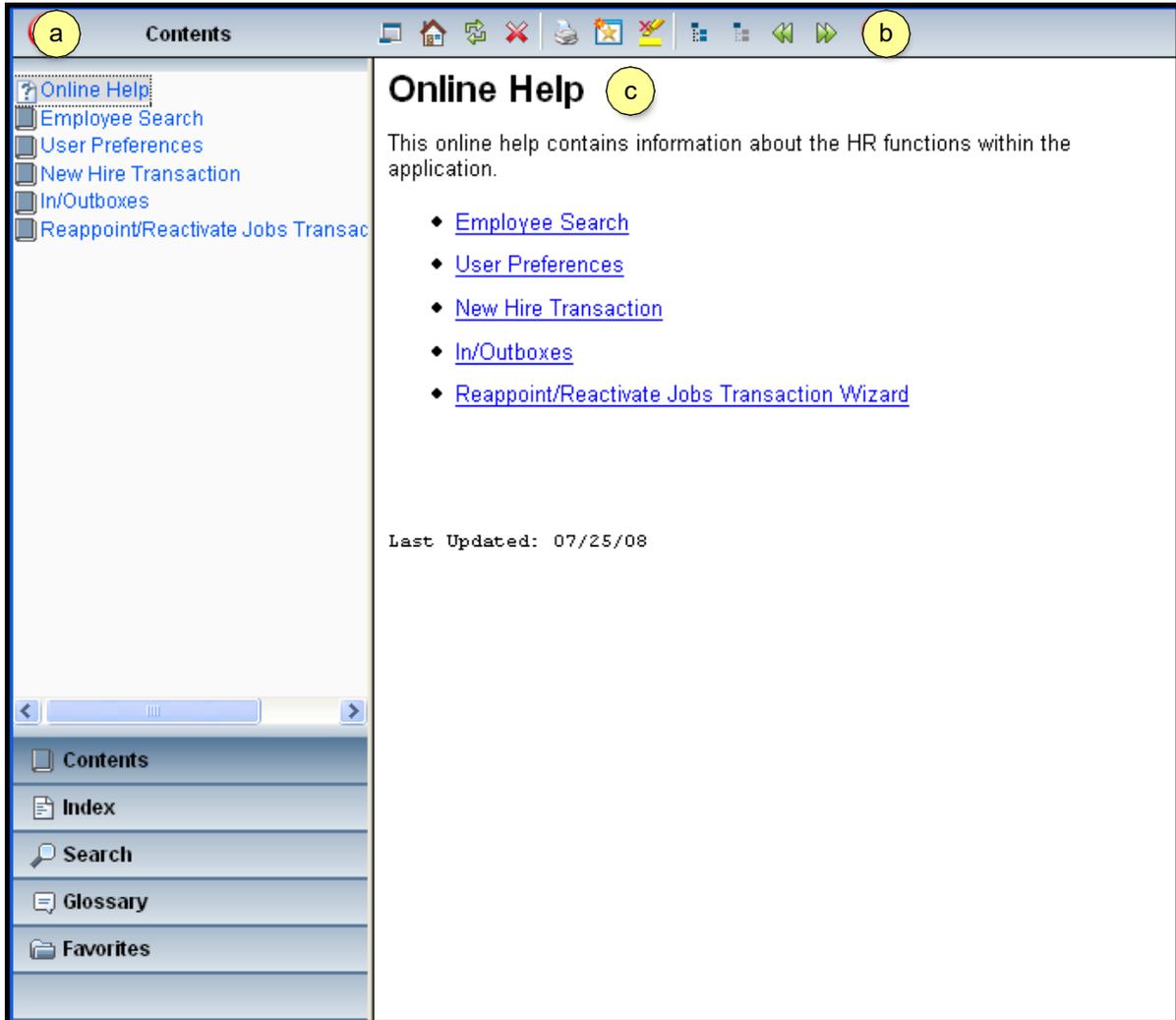
The **Online Help** feature houses information pertaining to the many functions of the HR Front End. The **Online Help** feature is accessible to users by simply clicking the **Help** link in the navigation menu.



**Figure 7: 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

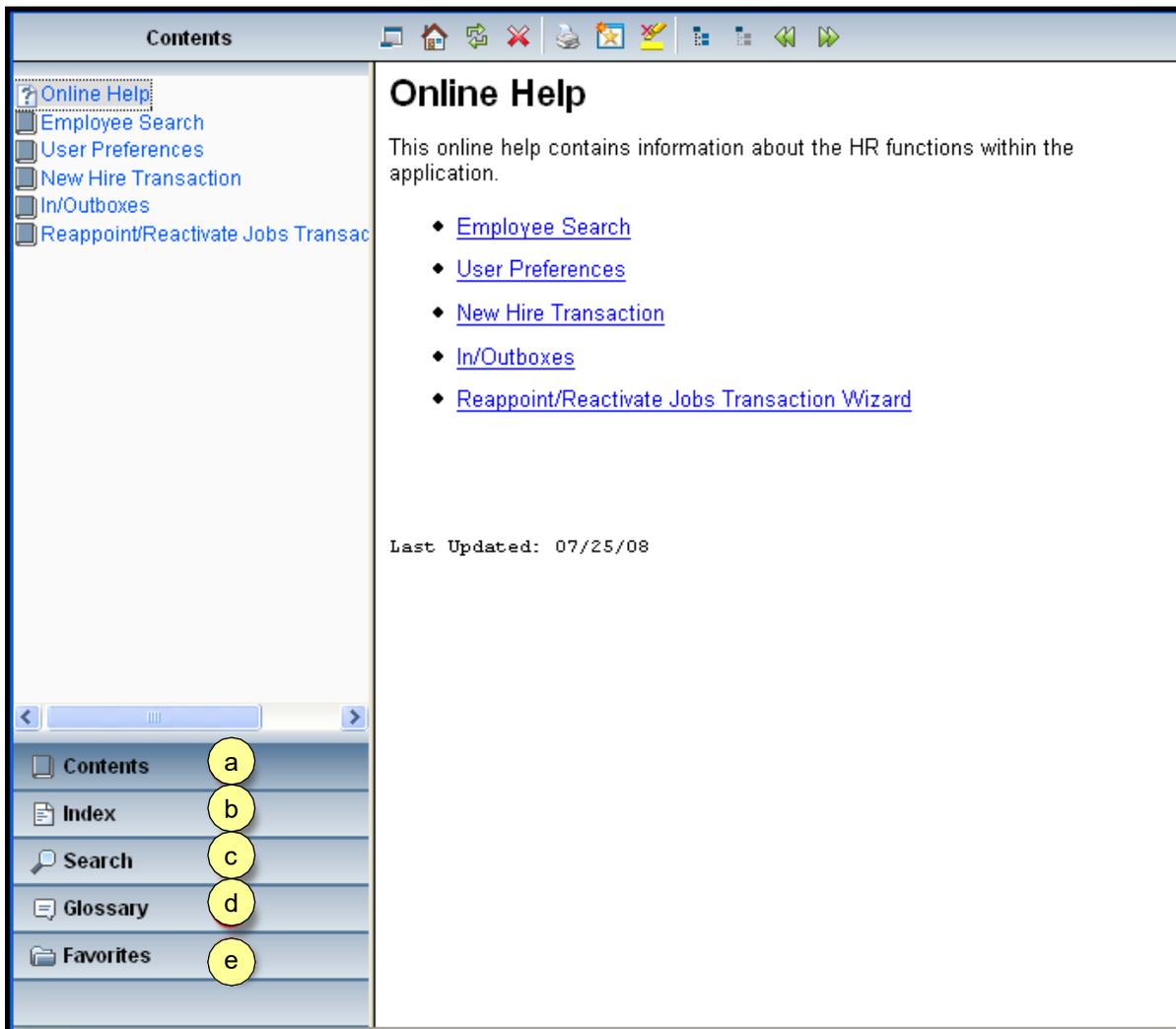


**Figure 8: Online Help Sections**

## ***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:

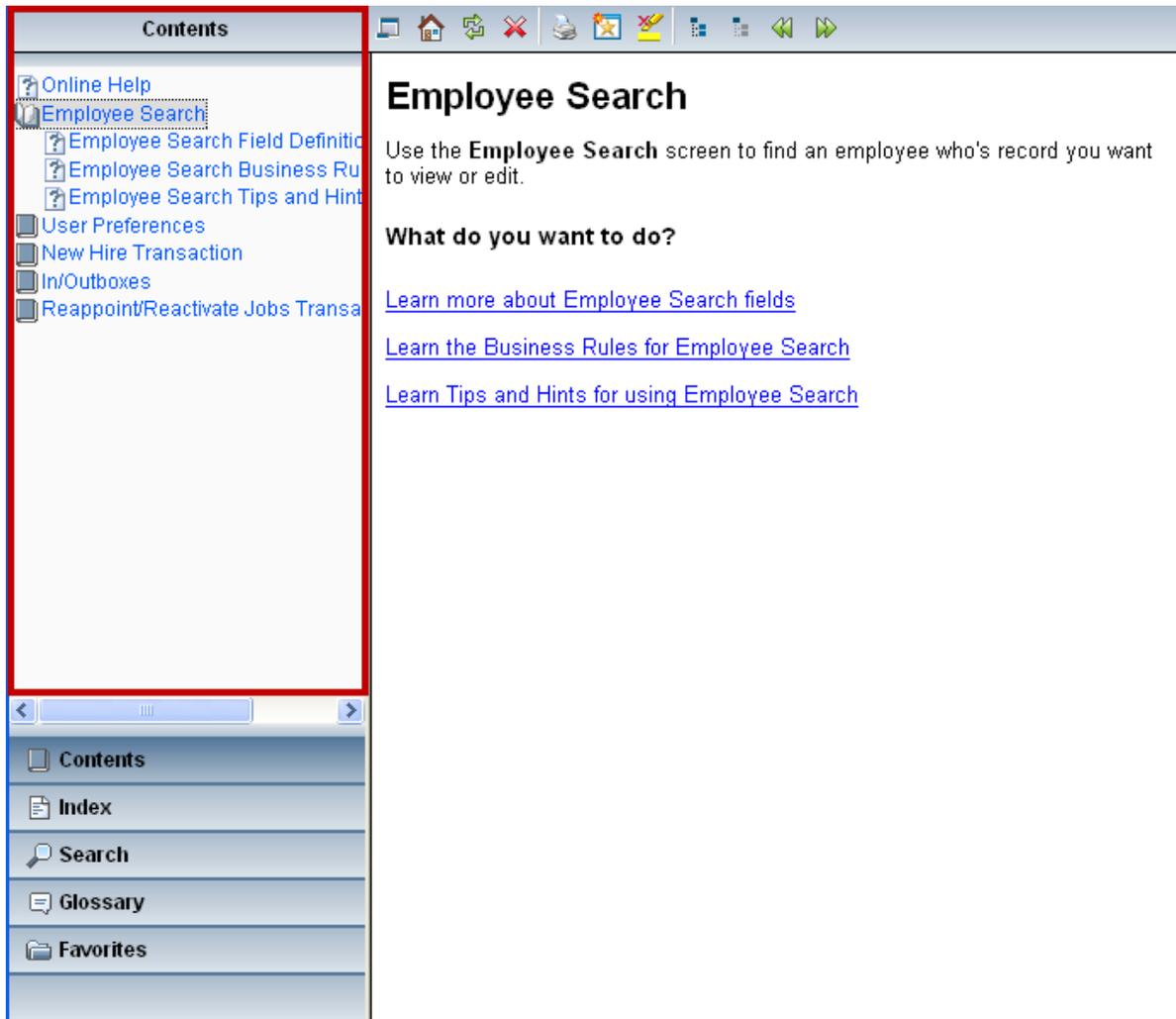
- a. **Contents** – displays contents that users will encounter in the HR Front End
- b. **Index** – provides a topical index to content in the HR Front End
- c. **Search** – allows users to search for HR Front End content within the Online Help Tool
- d. **Glossary** – provides a glossary of terms that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



**Figure 9: 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 10: 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.

The screenshot shows a web application interface with a navigation pane on the left and a main content area on the right. The navigation pane is titled "Index" and contains a list of topics including Active, Banner, Begin Date, Business Rules, Campus, COA, College, criteria, Defaults, Demographic, Department, Effective Date, Employee, Employee Group, Employee Search, End Date, Filter, filters, Group, ICard, Inbox, Job Change Reason, Job Details, Job E-Class, and Job End Date. Below the list are buttons for Contents, Index, Search, Glossary, and Favorites. The main content area is titled "Active Employee Found" and contains the following text:

The New Hire **Active Employee Found** screen appears if you select an active employee from the search results page.

You have three options to select from on this screen:

1. **Proceed to [ERV](#).**
2. **Return to the search screen to perform a new search.**
3. **Exit the New Hire Wizard.**

At this point a transaction has not yet been created, so if you decide to close the New Hire Transaction [wizard](#), nothing will be saved to your Inbox.

[Click here to view the Active Employee Found screen.](#)

Item	Action
Proceed to ERV...	Select this option to use the selected active employee name. Your security profile will be verified to determine your access rights within the view.
Return to the Search screen...	Select this option to return to your new hire search. The results from your previous search will still remain in the page.
Exit the New Hire Wizard	Select this option to return to the home page.
Continue	Continues the transaction with the action selected above.
Save	Saves the transaction to your Inbox.
Close	Closes the wizard without saving any changes and returns you to the homepage.
Delete Transaction	This button is disabled on this screen.

**Figure 11: 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.

The screenshot shows the application's search interface. On the left, a search box contains 'Employee Search' and a search button. Below it is a table of search results:

Rank	Item
1	User Preferences - Employee Search
2	Employee Search Field Definitions
3	Employee Search
4	Employee Search Business
5	Employee Search Tips and
6	New Hire Search
7	User Preferences
8	Reappoint/Reactivate Jobs
9	New Hire Employee Class &
10	User Preferences Tips and
11	User Preferences Business
12	Online Help
13	Active Employee Found
14	New Hire Search
15	New Hire Demographic Info
16	Employee Class and Benefi
17	Employee Class Description

The right pane displays the help page for 'User Preferences - Employee Search'. It includes the following sections:

**User Preferences - Employee Search**  
The **User Preferences** screen allows you to customize some default **Employee Search** features in the application.

**Employee Search Columns**  
The **Emp Search Columns** preferences allow you to customize the order in which the fields appear in the **Employee Search** results table.  
[Click here to view the User Preferences for the search results column display](#)

**Field Definitions**

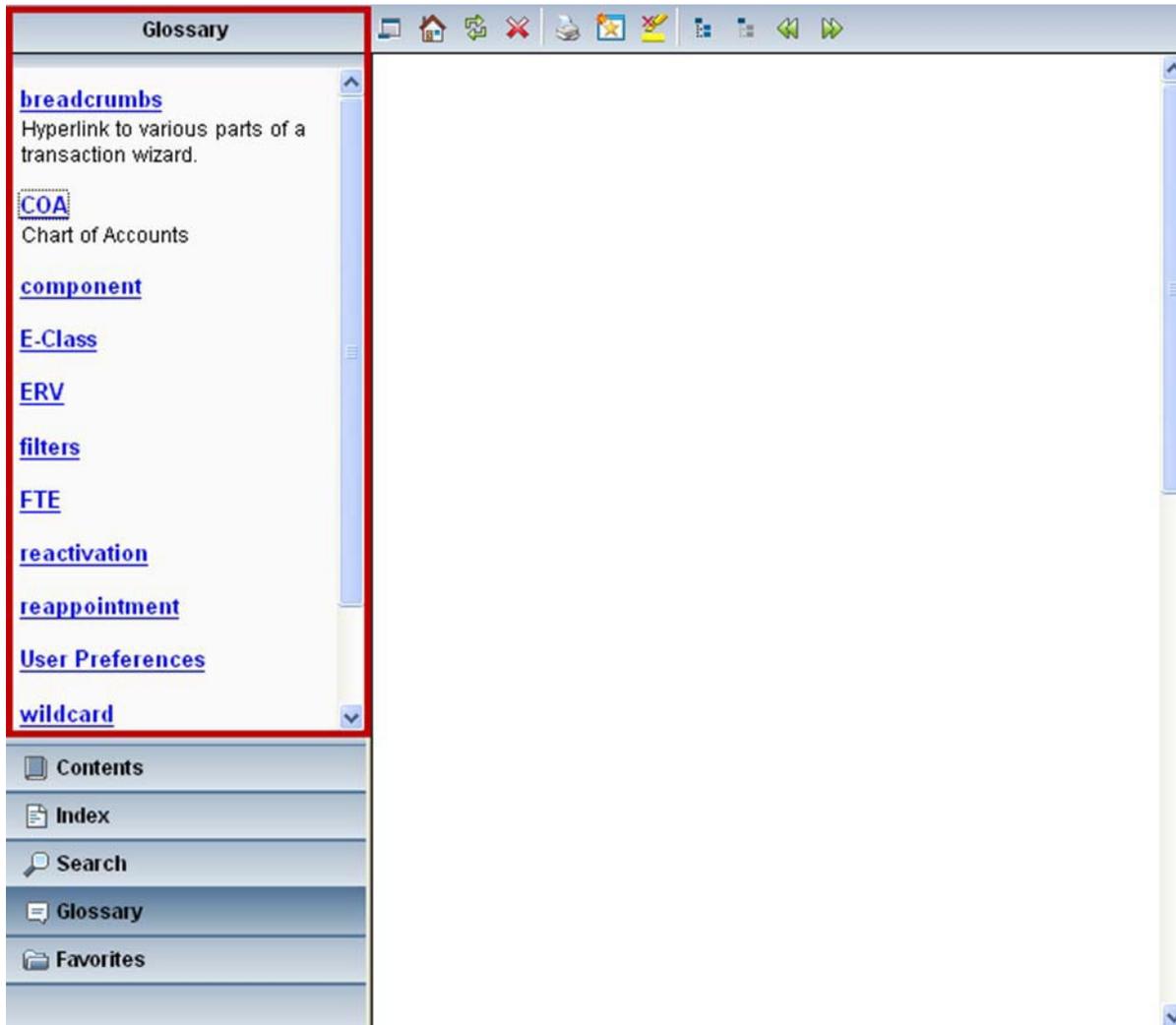
Item	Action
Available Columns	Columns available for display in the <b>search</b> results table. Highlight a column name and click the right-arrow to move the column to the Selected Columns list.
Selected Columns	Columns selected for display in the <b>search</b> results table. Highlight a column name and click the up or down arrow to move the column in the list. Click the left-arrow to move the column to the Available Columns list.
Preview Display	Display of the Selected Columns list. The table previews how your Selected Columns will appear in the <b>search</b> results list on the <b>Employee Search</b> screen.
Save	Click to save your default preferences for the <b>Employee Search</b> .
Cancel	Exits the screen without saving your changes.
Restore Defaults	Restores the preferences to the original settings for the system.

At the bottom of the left pane, there is a navigation menu with the following items: Contents, Index, Search, Glossary, and Favorites.

Figure 12: Navigation Pane - Search

## ***Online Help - Navigation Pane - Glossary***

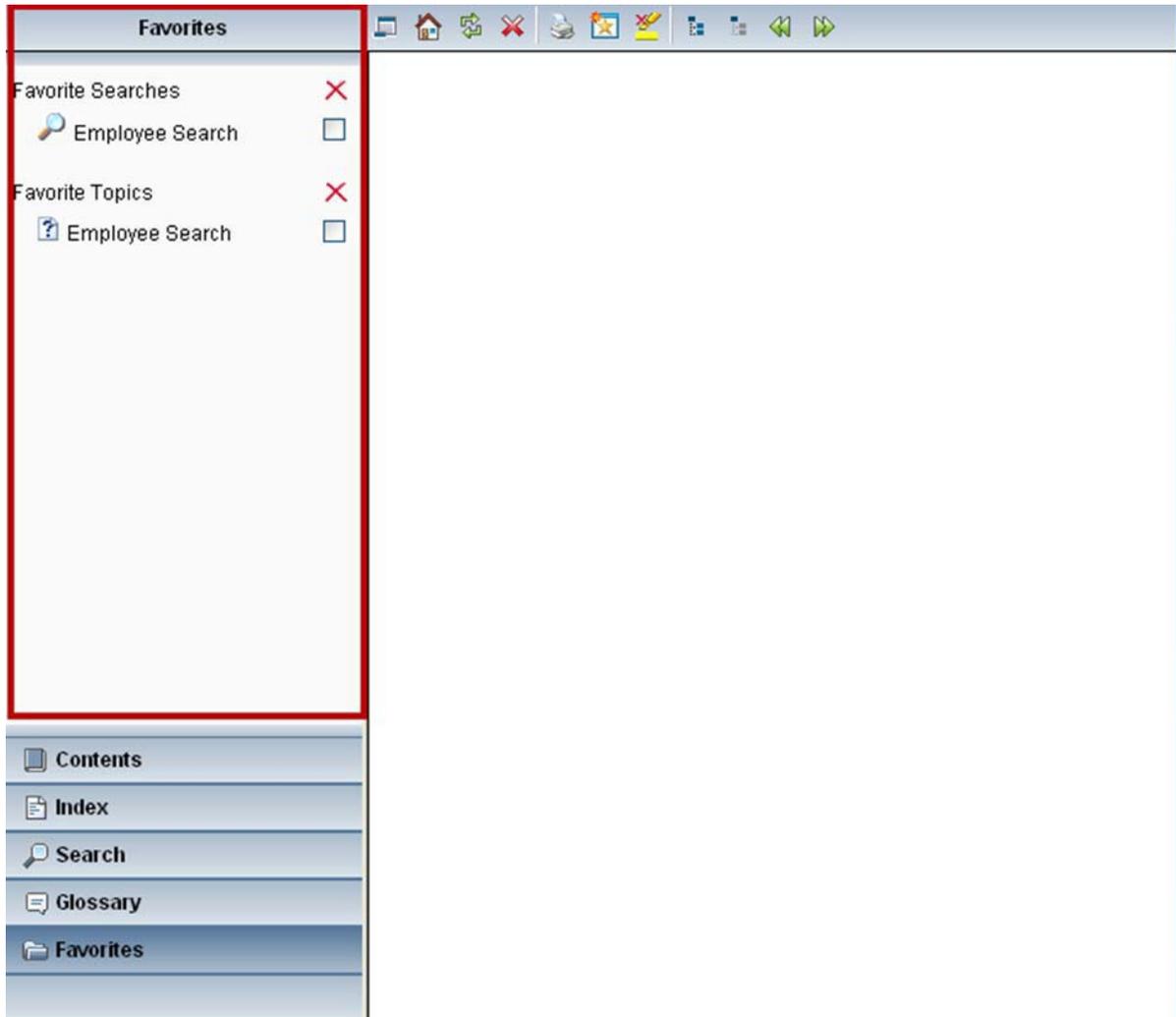
The **Glossary** section contains terms that users will encounter in the HR Front End application and their definitions. Unlike previous features mentioned. The terms selected in the glossary will remain contained in the left-hand pane of the Online Help feature.



**Figure 13: 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'.



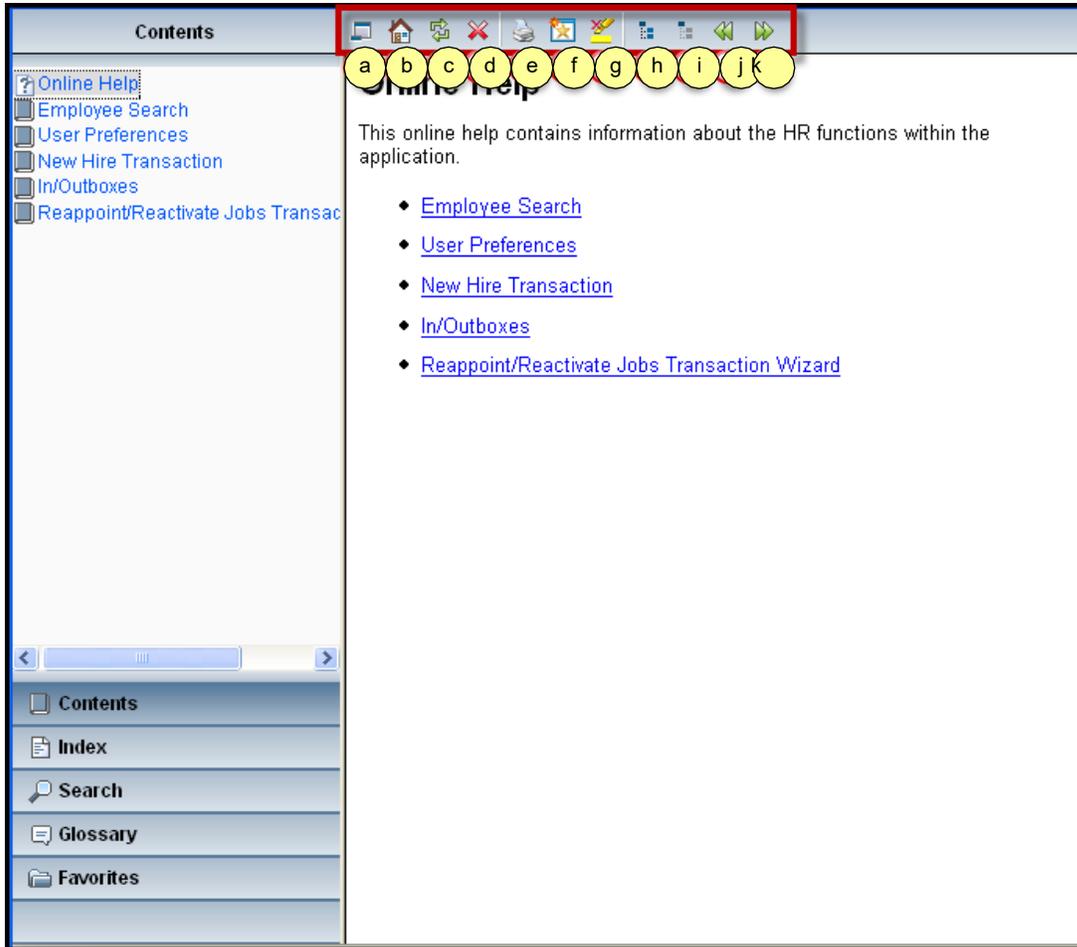
**Figure 14: Navigation Pane - Favorites**

## ***Online Help – Toolbar***

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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:

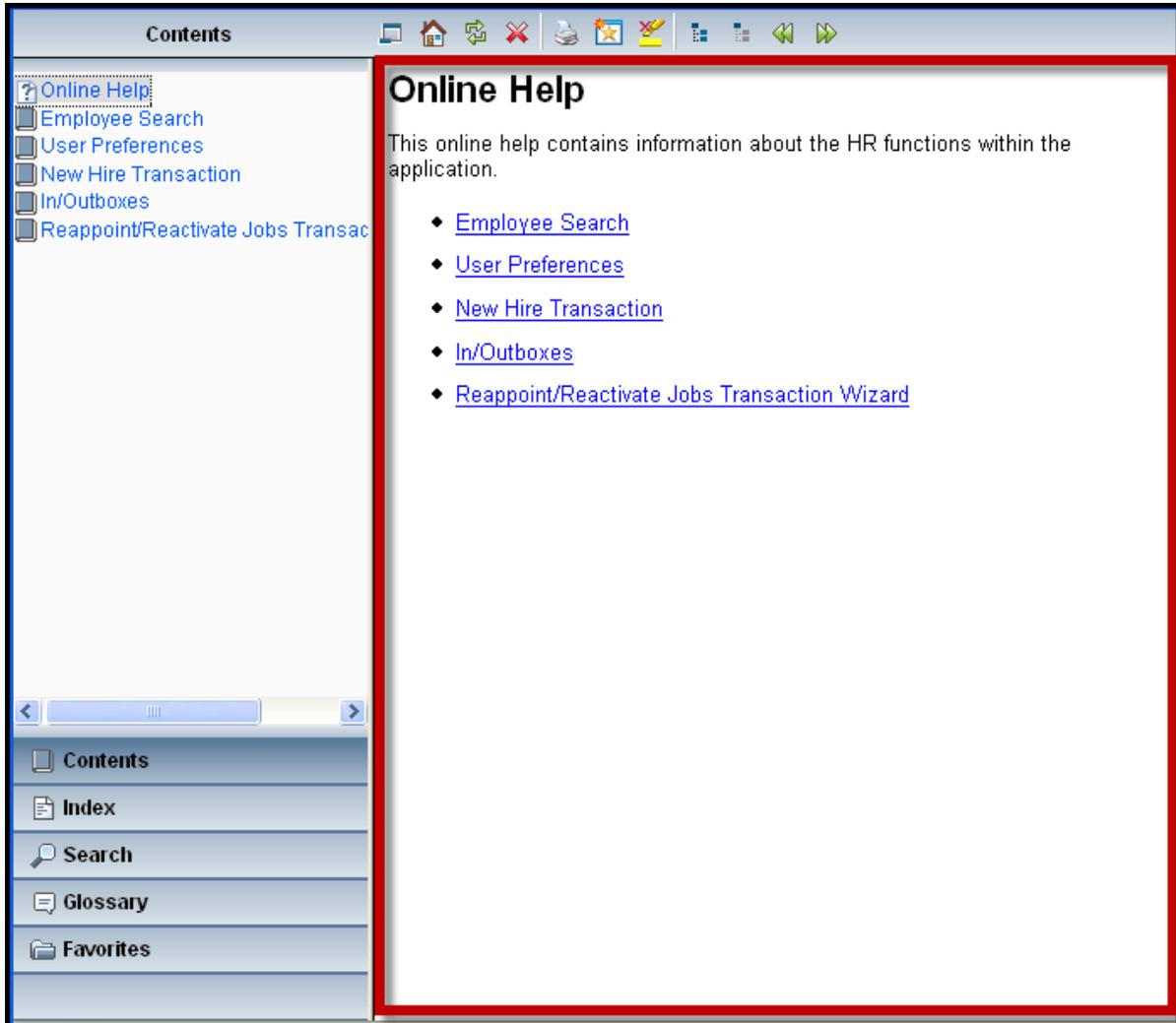
- a. **Hide/Show Navigation Area** – clicking this icon will either hide or show the navigation area
- b. **Go to Home Page** – clicking this icon will take users to the home page in OnlineHelp
- c. **Refresh** – clicking this icon will refresh the contents displayed
- d. **Stop** – clicking this icon 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 15: 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 16: Online Help – Content Pane**

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