HRFE Overview and Navigation
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

Course ID: HRFE Overview and Navigation
Date: October 10, 2020
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.
Users are responsible for any activity that occurs during their logon. The HR Front End 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.

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## HR Front End Overview and Navigation Course

### Course Introduction

<table>
<thead>
<tr>
<th>CHAPTER</th>
<th>YOU WILL LEARN ABOUT</th>
</tr>
</thead>
</table>
| 1 – The Home Page | • Information displayed on the Home Page  
                      • How to use the Home Page to navigate through the HR Front End Application |
| 2 – Employee Search | • The interface of the Employee Search feature  
                      • How to perform an Employee Search |
| 3 – Inboxes and Outboxes | • The interface of the inbox/Outbox feature  
                      • The functionality of the inbox/Outbox feature  
                      • How to use the Inboxes/Outboxes |
| 4 – Transactions | • The different types of transactions in the HR Front End Application  
                      • How to navigate to the Transactions in the HR Front End Application |
| 5 – Admin Tools | • The interface of the Admin Tools in the HR Front End Application  
                      • How to use the different tools that you will encounter in the Admin Tools feature |
| 6 – Online Help | • The interface of the Online Help tool in the HR Front End Application  
                      • How to access and use the Online Help feature |
| 7 – Employee Record View | • The interface of the Employee Record View in the HR Front End Application  
                      • How the Employee Record View is interrelated with other features in the HR Front End Application |
| 8 – Timeline View | • The interface of the Timeline View in the HR Front End Application  
                      • How to access and use the Timeline View |
| 9 – Course Review | • You will be given a short series of questions that review the material that was covered in this course |
University data integrity standards and transaction processing flows are the basis of the HR Front End. It is a "smart interface" that contains business and validation rules designed to increase data integrity.

The HR Front End was created to simplify the processing of hr transactions that take place via Banner. It sits on top of Banner and draws all necessary components for HR transactions together in one location so that users will no longer have to jump from form to form. It will not be replacing DART. It will, however, be replacing two applications that are currently performed in DART:

- Creating a New Hire | Changing Employee Group [which will be two separate transactions in the HR Front End]
- Separation
Ch. 1 - The Home Page

You will learn about:

- Information displayed on the Home Page
- How to use the Home Page to navigate throughout the Front End

Click Next to continue
In order to log in to the HR Front End, you will encounter this screen. You will need to enter your EnterpriseID and Password in order to access the Application.

Enterprise Application Login

1. Enter your Enterprise ID (for this course, you will not need your password)
2. Click the Login button

For access problems, questions, or comments, contact the AITS Help Desk at (217) 333-3102 (Illinois/NIC & UIS) or (312) 996-4906 (UC).

You can also e-mail the AITS Help Desk at helpdesk@illinois.edu

Enterprise Application Service, Version 2.0
The Home Page is the initial page that you will see when you log in to the HR Front End. Located at the top of this screen is the Navigation Bar, which allows users to navigate to different areas of the application.

From the Navigation Bar, you can click the following links (which will take you to different features of the application):

1. Home (accesses the Home Page)
2. Employee Search (accesses the Employee Search Feature)
3. In/Outboxes (accesses the Inboxes and Outboxes)
4. Transactions (accesses various Transaction types)
5. Admin Tools (accesses the Admin Tools where you can view your securities and customize certain settings)
6. Help (accesses the Online Help tool)
7. Logout (logs you out of the application)
In addition to the Navigation bar, the Home Page in the HR Front End contains additional elements to assist users.

The left-hand side of the screen contains:

- **Alerts & Messages**: Messages of importance to users will appear in this region of the Home Page.
- **Quick Search**: This feature allows users to enter a UIN to search for an employee from the Home Page.
- **Resources**: This region contains links to external resources for users.

Click Next to continue.
In this chapter, you learned about information pertaining to:

- The interface of the Home Page in the HR Front End
- The functionality of the Home Page in the HR Front End
Ch. 2 - Employee Search

You will learn about:

- The interface of the Employee Search Feature
- How to perform an Employee Search
The Employee Search feature allows users to search for both individuals and groups of individuals who are employed with the University of Illinois and allows them to view and/or edit their employee records. In this chapter, you will learn about the functionality and features of the Employee Search feature and perform an Employee Search.

### Employee Search

<table>
<thead>
<tr>
<th>Field</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNI</td>
<td></td>
</tr>
<tr>
<td>LAST NAME</td>
<td></td>
</tr>
<tr>
<td>FIRST NAME</td>
<td></td>
</tr>
<tr>
<td>USERID</td>
<td></td>
</tr>
<tr>
<td>SSN</td>
<td></td>
</tr>
<tr>
<td>COA:</td>
<td>* - All</td>
</tr>
<tr>
<td>COLLEGE:</td>
<td>* - All</td>
</tr>
<tr>
<td>DEPARTMENT:</td>
<td>* - All</td>
</tr>
<tr>
<td>ORGANIZATION:</td>
<td>* - All</td>
</tr>
<tr>
<td>CAMPUS:</td>
<td>* - All</td>
</tr>
<tr>
<td>EMPLOYEE GROUP:</td>
<td>* - All</td>
</tr>
</tbody>
</table>

- **INCLUDE TERMINATED EMPLOYEES**

[Click Next to continue]
Searching For Individuals

One type of search that users can perform is by searching for individuals employed by the University of Illinois.

Users can enter one or all of the following data into the fields to perform a search for an individual:

- UIN [which overrides all other data entered]
- Last Name
- First Name
- USERID
- SSN

Click Next to continue
The drop-down lists allow users to filter their search criteria. Each drop-down list for which they select a criterion will help to narrow down the search results.

Hover your mouse over the outlined drop-down lists to see examples of what types of items will be displayed.

Click Next to continue
Searching For Groups Of Individuals

The drop-down lists allow users to filter their search criteria. Each drop-down list for which they select a criterion will help to narrow down the search results.

Employee Search

- COA:
  - All
  - University of Illinois - Urbana
  - University of Illinois - Chicago
  - University of Illinois - Springfield
  - University of Illinois - Global
  - University of Illinois - Admin

- COLLEGE:
  - All
  - Organization:
    - All

- ORGANIZATION:
  - All

- EMPLOYEE GROUP:
  - All

Hover your mouse over the outlined drop-down lists to see examples of what types of items will be displayed.

Click Next to continue.
The drop-down lists allow users to filter their search criteria. Each drop-down list for which they select a criterion will help to narrow down the search results.

- Click Next to continue
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Click Next to continue
Searching For Groups Of Individuals

The drop-down lists allow users to filter their search criteria. Each drop-down list for which they select a criterion will help to narrow down the search results.

Employee Search

- COA:
  - * - All
- DEPARTMENT:
  - * - All
- CAMPUS:
  - * - All

INCLUDE TERMINATED EMPLOYEES

Hover your mouse over the next options to see examples.

Click Next to continue.
Searching For Groups Of Individuals

The drop-down lists allow users to filter their search criteria. Each drop-down list for which they select a criterion will help to narrow down the search results.

Hover your mouse over the drop-down lists to see examples of different values.

Click Next to continue.
The drop-down lists allow users to filter their search criteria. Each drop-down list for which they select a criterion will help to narrow down the search results.
Employee Search Activity

This activity is representative of an actual employee search in the HR Front End. The drop-down lists have been pre-populated for you and the directions are given below.

Enter the following information in the text fields:

Last Name:
First Name:

Click the Search button to continue.
Once the user clicks the search button, the results will appear that reflect the search criteria that they selected.

To Select the Employee Record:
- Double-click on the desired search result, or
- Click the desired result and then the Select button.
By selecting an Employee Record from the list in the Employee Search users arrive at the Employee Record View. The Employee Record View will be covered in detail later on in this course.
In this chapter, you learned about information pertaining to:

- The interface of the Employee Search Feature
- The functionality of the Employee Search Feature
- How to perform an Employee Search
Ch. 3 - Inboxes and Outboxes

You will learn about information pertaining to:

- The interface of the Inbox/Outbox feature
- The functionality of the Inbox/Outbox feature
- How to use the Inboxes/Outboxes

Click Next to continue
HR Front End Overview and Navigation Course

As transactions travel along a route path in the system, they are modified and reviewed. At each stop in the route path, you need to know if a transaction is available for you to work. The In/Outboxes are where you will find transactions that are already in progress. In this chapter, we will explore the many facets of the In/Outboxes.

The Inbox and Outbox views provide users with an efficient way to:

- View transactions that they own
- View transactions that have been sent to them
- View transactions processed directly by them
- View transactions processed by others within the same permission group
- Identify transactions which they can access

Click Next to continue
The Inbox and Outbox radio buttons allow users to transition from lists of transactions that they own, have had sent to them by another user, processed by them directly, or processed by others within the same permission group.

Hover your mouse over the outlined Inbox and Outbox radio buttons.

Click Next to continue
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Group Inboxes:
Displays the transactions that are available to a group of individuals with similar security permissions. Items in the Group Inboxes allow users to take ownership of a transaction in order that they can work on it.

Hover your mouse over the outlined Inbox and Outbox radio buttons.

Click Next to continue
The Inbox and Outbox radio buttons allow users to transition from lists of transactions that they own, have had sent to them by another user, processed by them directly, or processed by others within the same permission group.

My Outbox:

Allows users to view the statuses of transactions that have moved out of their inbox. The My Outbox contains:

Transactions users have previously owned and worked on that they have sent on the predetermined routing path with a Route command. Those transactions meet the above criteria and are still in the system.

Hover your mouse over the outlined Inbox and Outbox radio buttons.

Click Next to continue.
The Inbox and Outbox radio buttons allow users to transition from lists of transactions that they own, have had sent to them by another user, processed by them directly, or processed by others within the same permission group.

Hover your mouse over the outlined Inbox and Outbox radio buttons.

Click Next to continue.

- Group Outboxes:
  - Allow users to view the statuses of all transactions that have been processed by themselves or other users with the same security permissions. The Group Outboxes view contains:
    - All transactions on which you worked (had ownership of)
    - All transactions that were in the Group Inbox at one time but you did not "own"
The Inbox and Outbox Presets allow users to refine the list of displayed transactions based on user-declared settings.
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The Inbox and Outbox Presets allow users to refine the list of displayed transactions based on user-declared settings.

**Show Filter and Preset Chooser:**

When users click this button, the filter and preset chooser will display. This allows users to either create a filter or a preset to narrow down transaction criteria.

**Hover your mouse over the outlined Filter and Preset items**

**Click Next to continue**
The Inbox and Outbox Presets allow users to refine the list of displayed transactions based on user-declared settings.

**Personal Preset Noise:**
- None

**Criteria for Listed Transactions:**
- Route Step Role
- E Group
- College
- Route Step Level
- Campus
- Department
- Transaction Type
- COA
- Organization

**Refresh List:** Users click this button to refresh the list of displayed transactions. The list will remain as originally viewed until a user clicks this button (which will enable them to view new transactions as well).

**Take/Release Ownership:** Once users select a transaction, they can either take ownership of it (in order that they can work on it) or release ownership (in order that another user can work on it).

**Select:** Once a user clicks on a transaction, they can open it to work on it by clicking the select button.
The Inbox and Outbox Presets allow users to refine the list of displayed transactions based on user-declared settings.

Hover your mouse over the outlined Filter and Preset items

Click Next to continue
Locating a transaction can become cumbersome once the list begins to grow. Filters allow users to easily locate transactions on which they need to work by choosing from different criteria by which they can set the filter(s). When users create Presets, they are available to them at any time. Users can select a Preset to apply it to the current transaction list.
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Save Updated:

If a user selects a preset and then makes changes to the filter criteria, they can click this button if they desire to update the filter criteria for the particular preset.

Click Next to continue.
Selecting Presets

Locating a transaction can become cumbersome once the list begins to grow. Filters allow users to easily locate transactions on which they need to work by choosing from different criteria by which they can set the filter(s). When users create Presets, they are available to them at any time. Users can select a Preset to apply it to the current transaction list.
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Filter List:
Rather than users selecting a preset, users can use the filter list option as a temporary filter. They can first select the filter criteria and then click the filter list button.

Hover your mouse over the outlined Filter and Preset items

Click Next to continue
Locating a transaction can become cumbersome once the list begins to grow. Filters allow users to easily locate transactions on which they need to work by choosing from different criteria by which they can set the filter(s). When users create Presets, they are available to them at any time. Users can select a Preset to apply it to the current transaction list.
There are various criteria which users can choose when creating either a filter or a preset. This is done by selecting criteria from the menus in the Filter and Preset Chooser.
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Hover your mouse over the outlined Filter and Preset items

Click Next to continue
There are various criteria which users can choose when creating either a filter or a preset. This is done by selecting criteria from the menus in the Filter and Preset Chooser.

Hover your mouse over the outlined Filter and Preset items.

- Route Stop Role: The role where the transaction is located along the routing path
- Route Stop Action: The action a user takes at a route stop
- Route Stop Level: Organization level at which the associated role acts

Click Next to continue.
There are various criteria which users can choose when creating either a filter or a preset. This is done by selecting criteria from the menus in the Filter and Preset Chooser.

Hover your mouse over the outlined Filter and Preset items

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Hover your mouse over the outlined Filter and Preset items

Click Next to continue
There are various criteria which users can choose when creating either a filter or a preset. This is done by selecting criteria from the menus in the Filter and Preset Chooser.

Hover your mouse over the outlined Filter and Preset items

The remaining lists allow you to filter by Campus, COA, College, Department, and Organization.

Click Next to continue
Another way that users can configure what type of transactions that are in their outboxes is by declaring transactions that were completed within a specific time frame. This allows for the user to determine the amount of transactions that are within the outboxes.

Hover your mouse over the outlined Filter and Preset items

Click Next to continue
Another way that users can configure what type of transactions that are in their outboxes is by declaring transactions that were completed within a specific time frame. This allows for the user to determine the amount of transactions that are within the outboxes.

Show Completed Transactions in Outbox for: 30 days. Apply to List. Set as Default.

This allows users to limit the amount of transactions displayed by the completion date of a transaction.

Hover your mouse over the outlined Filter and Preset items.

Click Next to continue.
Another way that users can configure what type of transactions that are in their outboxes is by declaring transactions that were completed within a specific time frame. This allows for the user to determine the amount of transactions that are within the outboxes.

Hover your mouse over the outlined Filter and Preset items

Click Next to continue
Activity: Filtering a List of Transactions

While this example demonstrates the Filter and Preset Chooser for My Inbox, its functionality is the same in all of the Inboxes and Outboxes. The following activity will allow users to apply a temporary filter to a list of transactions.

To display the Filter and Preset Chooser, Click the Show Filter and Preset Chooser button.
Activity: Filtering a List of Transactions

Click on the Filter List button to continue.

Once the Filter and Preset Chooser appears, you can choose from a variety of criteria. Notice that the following choices have been made for you:

Transaction Type, Route Stop Action, Route Stop Level, and E-Group

*Note, if we were creating a preset, rather than click the Filter List button, we would type a name in the Preset Name box and then click the Add as Preset button.
Once the temporary filter has been applied, the transaction list will configure accordingly with the declared criteria.

Select the transaction by:

- Double-clicking on the highlighted results, or
- Clicking the highlighted results and then the Select button.
By selecting a transaction from the transaction list in the Inboxes/Outboxes users can navigate to the Employee Record View. This is yet another way to access an Employee Record View.

<table>
<thead>
<tr>
<th>ID</th>
<th>Change Date</th>
<th>Personnel Date</th>
<th>Job</th>
<th>TS Org</th>
<th>Job Change Reason</th>
<th>Change Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>09/28/2008</td>
<td>09/29/2008</td>
<td>UA0016-00 SPECIALIST II</td>
<td>1-101000 Control - OBFS Financial Services</td>
<td>HR001, New Hire</td>
<td>NEW</td>
</tr>
</tbody>
</table>

Click Next to continue.
In this chapter, you learned about information pertaining to:

- The interface of the Inbox/Outbox feature
- The functionality of the Inbox/Outbox feature
- How to use the Inboxes/Outboxes
Ch. 4 - Transactions

You will learn about:

- The different types of transactions in the HR Front End
- How to navigate to the transactions in the HR Front End
The Transactions option provides users with a list of transaction types which they can perform on an employee.

The list of transactions will change once you enter the Employee Record View. When on the Home Page in the HR Front End, the available transactions are:

- Initiate New Hire
- Position Creation Maintenance

Click Next to continue
Users will be able to see a complete list of transactions once they have navigated to the Employee Record View. The following screens will give a general overview of transactions in the HR Front End.
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Hover your mouse over each transaction item for descriptions.

Click here to continue.
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Transaction History

This will allow users to view the history of transactions performed on an employee.

Hover your mouse over each transaction for description.

Click here to continue
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.
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Position Creation Maintenance:
A transaction that allows users to create or maintain single or pooled positions in the University.
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Hover your mouse over each transaction item for descriptions.

Add A Job:
Allows users to add new jobs to an employee's record.

Click here to continue
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Hover your mouse over each transaction item for descriptions.

Employee Data:
This transaction allows users to make changes to employee data.
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Employee Job Record Change:
This transaction allows users to make changes to an employee's job record.

Hover your mouse over each transaction item for descriptions.

Click here to continue.
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Hover your mouse over each transaction item for descriptions.

Click here to continue
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Historical Job Change:
This transaction allows users to make changes to an employee’s job personnel date after a payout has been applied.

Hover your mouse over each transaction item for descriptions.
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Hover your mouse over each transaction item for descriptions.

Click here to continue
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

- Hover your mouse over each transaction item for descriptions.
- Click here to continue.
This page gives a basic definition of each transaction. Transaction History will be covered in this chapter. Additional Transactions will be explored in-depth in other courses.

Hover your mouse over each transaction item for descriptions.

Separation:
This transaction allows users to separate an employee from the University.

Click here to continue.
When the Transaction History is accessed from the Transactions menu, the screen below will appear.

To see a detailed description of each item, hover your mouse over the outlined items in this Transaction History Screen.
When the Transaction History is accessed from the Transactions menu, the screen below will appear.

The Transaction History allows users to view a list of transactions that have been performed on an employee. Users can see the completed date, transaction type, the date the transaction was initiated, its status, the employee's home org, the effective date, and the transaction id.

To see a detailed description of each item, hover your mouse over the outlined items in this Transaction History Screen.

Click Next to continue.
When the Transaction History is accessed from the Transactions menu, the screen below will appear.

The Component History allows users to view specific components within a particular transaction. The completed date, component type, date it was initiated, status, home org, effective date, transaction id, and component id are all available for users to view.

To see a detailed description of each item, hover your mouse over the outlined items in this Transaction History Screen.

Click Next to continue.
**Transaction History**

When the Transaction History is accessed from the Transactions menu, the screen below will appear.

**Component History - Trans ID: 579**

Once users have selected a component and the screen refreshes, they can view the audit trail for that particular component. This allows them to view specific changes that occurred within a transaction.

To see a detailed description of each item, hover your mouse over the outlined items in this Transaction History Screen.

Click Next to continue...
Upon viewing the list of transactions in the Transaction History, you are able to select a transaction to view its Component History.

<table>
<thead>
<tr>
<th>Select</th>
<th>Completed Date</th>
<th>Trans Type</th>
<th>Initiated Date</th>
<th>Status</th>
<th>Home Org</th>
<th>Effective Date</th>
<th>Trans Id</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2006-09-02 09:43:10.0</td>
<td>ERC</td>
<td>2006-09-02 09:41:07.0</td>
<td>Applied to Banner</td>
<td>U-9-699008</td>
<td></td>
<td>579</td>
</tr>
</tbody>
</table>

Click the Select button to view the Component History of the transaction.
Once the transaction is selected, the Component History will display below the selected transaction. From this point, you can select a particular component to view the Audit Trail.

Click the Select button to view the Audit Trail.
Let’s view the Employee Record View for this Transaction. Click the View ERV button.

You are able to view the Audit Trail within the Transaction History. In the Audit trail, you are able to view the changes that have been made to the transaction.
Since the data for this transaction has already been applied to Banner, the Historical Employee Record View is displayed.

The Employee Record View will be covered in detail in the Employee Record View chapter in this course.
In this chapter, you learned about information pertaining to:

- Transactions users will encounter in the HR Front End
- An overview of Transactions in the HR Front End
Ch. 5 - Admin Tools

You will learn about:

- The interface of the Admin Tools in the HR Front End
- How to use the different tools that you will encounter in the Admin Tools feature

Click Next to continue
The Admin Tools allow users to customize settings within the application.

Click the User Preferences link to continue.

This menu will be generated according to user security permissions. Users will see:

- User Preferences and
- User Security

"Administrators will see additional items"
User Preferences allows users to customize certain features of the HR Front End application.

Click the Employee Search Columns drop-down choice to continue.

Once in User Preferences, you will have the option to customize:

- Employee Search Columns
- Employee Search
- In/Outbox Columns
The Employee Search Columns allow users to customize the appearance of the columns in the Employee Search feature. Users will select the Employee Search Columns from the drop-down menu in the User Preferences.

Under Available Columns, click on the outlined Middle criteria.
Notice how the choice that was selected is now highlighted in blue.

In order to move the item from Available Columns to Selected Columns, click the outlined arrow.
Notice how the Middle criterion now appears under Selected Columns and simultaneously appears in the sample Employee Search Columns below. Once an item is in Selected Columns, if it is not greyed out, you can use the arrows to move items up and down to organize the Columns layout.

From this point, you can click: Save (saves current settings), Cancel, or Restore Defaults (restores to original default settings).

Click Save to continue
Now that we have customized the Employee Search Columns, let's customize the Employee Search settings.

Click the Employee Search drop-down choice to continue.
Each drop-down criteria in the Employee Search is described in detail on this page.
The drop-down lists in this section allow you to establish custom settings that appear when you access the Employee Search feature.

Hover your mouse over the drop-down options to see a sample of options from which you can choose to use as settings for the Employee Search feature.

Click Next to continue.
The drop-down lists in this section allow you to establish custom settings that appear when you access the Employee Search feature.

Hover your mouse over the drop-down options to see a sample of options from which you can choose to use as settings for the Employee Search feature.

Click Next to continue.
Hover your mouse over the drop-down options to see a sample of options from which you can choose to use as settings for the Employee Search feature.
The drop-down lists in this section allow you to establish custom settings that appear when you access the Employee Search feature.

Hover your mouse over the drop-down options to see a sample of options from which you can choose to use as settings for the Employee Search feature.

Click Next to continue.
The drop-down lists in this section allow you to establish custom settings that appear when you access the Employee Search feature.

Hover your mouse over the drop-down options to see a sample of options from which you can choose to use as settings for the Employee Search feature.

Click Next to continue.
The drop-down lists in this section allow you to establish custom settings that appear when you access the Employee Search feature.

Hover your mouse over the drop-down options to see a sample of options from which you can choose to use as settings for the Employee Search feature.

Click Next to continue.
The drop-down lists in this section allow you to establish custom settings that appear when you access the Employee Search feature.

Hover your mouse over the drop-down options to see a sample of options from which you can choose to use as settings for the Employee Search feature.

Click Next to continue.
Hover your mouse over the drop-down options to see a sample of options from which you can choose to use as settings for the Employee Search feature.
The drop-down options here have been pre-selected for you. Once the choices have been selected, you can either click:

- **Save** (saves the settings that you have chosen and applies them to the Employee Search)
- **Cancel** (cancels the changes that you have made to the Employee Search)
- **Restore Defaults** (restores the Employee Search settings to the default system settings)

First click the **Save** button to save the settings, and then click the Employee Search link to see that the changes have been applied.
Let's return to User Preferences. Click the User Preferences link.

After the changes have been made, those settings are now the default settings for the Employee Search feature.
Now that we have customized the Employee Search feature, let's customize the In/Outbox column settings.

Click the In/Outbox Columns link to continue.
The In/Outbox Columns (similar to Employee Search Columns) allow you to customize the appearance of the columns in the In/Outbox feature.

Under Available Columns, click on the outlined Middle Name criteria.
Notice that the selection that was made in the Available Columns is now highlighted.

To move the item from Available Columns to Selected Columns, click the outlined arrow.
Notice that the selection that was made in the Available Columns is now highlighted. Once an item is in Selected Columns, if it is not greyed out, you can use the arrows to move items up and down to organize the Columns layout.

Click the Save button to continue.
The next feature of Admin Tools that we will visit is User Security.

Click the User Security link to continue.
User Security allows users to view their current security permissions within the HR Front End. They can view information pertaining to the user (UIN, Name, Enterprise ID), what actions/route stops, org codes, employee groups, transaction types, and dates which these permissions are active. Permissions are indicated by checks in the boxes.

The following may appear under the Actions column:

- **Initiate** - indicates that the user will have security permissions to initiate a transaction
- **Review** - indicates that the user will have security permissions to review a transaction
- **Apply** - indicates that the user will have security permissions to apply a transaction
In this chapter, you learned about information pertaining to:

- The interface of the Admin Tools in the HR Front End
- The functionality of the Admin Tools feature
The HR Front End has an online help feature to assist users. Accessing this online help feature is done by clicking the help link located in the navigation menu. Wherever a user is at in the HR Front End, the Online Help will configure itself to access content pertaining to that particular section.

Click the Help link to access the Online Help feature.
HR Front End Overview and Navigation Course

HR Front End Training

The following online courses are interactive and allow users to train as if they were actually in the HR Front End. Please select the appropriate course to begin training. NOTE: You will need Adobe Flash Player installed on your computer in order to take these courses. You can download the latest version of Adobe Flash Player at http://get.adobe.com/flashplayer. Contact your network administrator for this download if you are not an administrator of your machine.

For questions or problems with the online courses, please email personnelsupport@bullhorn.net

NOTE: Please check with your campus HR representative regarding which of the following courses are required for HRFE Security access.

HRFE Overview and Navigation - This course provides individuals with an understanding of the HR Front End. SOUND ENABLED.

New Hire - No Sound
Add a Job - No Sound
Employee Job Record Changes - No Sound
Labor Distribution Only Changes - No Sound
Employee Data Changes - No Sound
Job End Date - No Sound
Reassignments - No Sound
Separations - No Sound
Employee Group Change - No Sound
Historical Job Change - No Sound
Position Creation and Maintenance - No Sound
HRFE Foundations Course - Provides individuals with an understanding of the relationship from Banner to the HR Front End.

Additional resources:
- HR Front End Navigation
  - Overview
- HRFE Details
  - Help & Support
  - Knowledge Base
  - Version & Release Content
  - Status Team

Click Next to continue
In this chapter, you learned about information pertaining to:

- The Online HR Front End Help page
Ch. 7 - Employee Record View

You will learn about:

- The Interface of the Employee Record View in the HR Front End
- How the Employee Record View is interrelated with other features in the HR Front End
The Employee Record View (ERV) provides, on one screen, all information pertaining to an employee and the jobs that they hold at the University of Illinois. Information is presented in a tabbed layout with expandable accordions.

The View Date field, in particular, will allow users to navigate to specific date(s) on an employee's record. This will help when there are records either in the past or the future that users want to view. This can also be the effective date of a transaction once it is initiated.

Information is in a tabbed layout in two sets. The first set of tabs contains employee information (Information contained in PEAEMPL records in Banner). The second set of tabs contains Job information (Information contained in NBAJOBS records in Banner). Information within the tabs is organized in a condensed, accordion format. We will explore the accordions throughout this chapter.
Aside from the Last Name, First Name, UIN, Home Org, E-Class, FTE, and Base Salary, users will find additional information.

Users will also see:
- Full/Limited View - Type of view that users have
- Transaction - displays the transaction type if there is one
- Transaction ID - this number will display immediately after the transaction type (if a transaction has been initiated)
- Component ID - this number will display immediately after the Transaction ID number
- Job Access - will display which Orgs have access to this employee's job records

Click Next to continue.
<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Change</td>
<td>After users have saved a transaction, they can add the change(s) that appear</td>
<td>Route</td>
<td>Clicking this button will route the transaction on to the next stop in the</td>
</tr>
<tr>
<td></td>
<td>under the proposed changes accordion bar by clicking the add change button.</td>
<td></td>
<td>pre-determined routing path.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Users are able to cancel the transaction by clicking the cancel button.</td>
<td>Save</td>
<td>Clicking this button will save the information that has been entered thus</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>far on a transaction.</td>
</tr>
<tr>
<td>Expand All</td>
<td>When users desire to see an expanded/collapsed view of the employee’s job</td>
<td>Send FYI</td>
<td>Sends a read-only copy of the transaction.</td>
</tr>
<tr>
<td>Collapse All</td>
<td>record, they can do so by clicking either the expand all or collapse all</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited ERV</td>
<td>Clicking the limited ERV button provides users with a very limited version of</td>
<td>Sina To</td>
<td>Sends the transaction to individuals that exist outside of the pre-determined</td>
</tr>
<tr>
<td>Full ERV</td>
<td>the Employee Record View. Clicking the Full ERV button will provide users</td>
<td></td>
<td>routing path.</td>
</tr>
<tr>
<td>Print Friendly View</td>
<td>Provides a print-friendly view of the elements on the screen in order that</td>
<td>Request Access</td>
<td>When a user is in Limited ERV, they can request access to view Full ERV by</td>
</tr>
<tr>
<td></td>
<td>the user can obtain a printable, hard copy.</td>
<td></td>
<td>clicking this button.</td>
</tr>
<tr>
<td>Release Ownership</td>
<td>Clicking Release Ownership will make it possible for other individuals in</td>
<td>Timeline View</td>
<td>Accesses the Timeline View of the Employee’s Record.</td>
</tr>
<tr>
<td>Take Ownership</td>
<td>their permissions group to work on the transaction. Clicking Take Ownership</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Return</td>
<td>Returns the transaction to the previous stop in the routing path.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Clicking this button will display information pertaining to a specific date</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Under the General Info tab, users will find the Employee General Information accordion. This accordion contains information such as: dates relevant to their employment, employee class, citizenship information, etc.

Now let’s explore the Bio/Demo tab. Click this tab to continue.

Once you have clicked on General Info tab and the Employee General Information accordion has been expanded, you will see general information/data pertaining to the employee displayed.
The Bio/Demo tab contains biographical and demographical information that the employee entered via Nessie New Hire. Notice that the elements under the Bio/Demo tab are in accordion format. When in the HR Front End, you can expand one or more accordion bars when necessary. The following screens will explore the elements under the Bio/Demo tab.

Click the Employee Bio/Demo information accordion.
This accordion contains basic biographical and demographical information such as SSN (which is masked for security purposes), Birthdate, Gender, and more.

Now click the Addresses accordion.
The Addresses accordion contains not only physical addresses, but also email addresses and phone numbers where they can be reached.

Now let's click the Emergency Contact Information accordion.
The Emergency Contact Information accordion contains emergency contacts that the employee entered via Nessie New Hire.

Now let's click the Education accordion.
Now let's click the Work History accordion.
The Work History accordion contains a detailed work history record of the employee.

Now let's click the Licenses accordion.
The Licenses accordion contains information pertaining to any specific licenses that the employee may hold.

Now let's click the Certifications accordion.
Now let's click the Drivers Licenses accordion.

<table>
<thead>
<tr>
<th>CERTIFICATIONS</th>
<th>Title</th>
<th>Number</th>
<th>Date Acquired</th>
<th>Renewal Date</th>
<th>Expiration Date</th>
<th>State</th>
<th>Nation</th>
<th>Issuing Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Drivers Licenses accordion contains information pertaining to Drivers Licenses that the employee may hold.

Now let's click the Languages accordion.
The Languages accordion contains information pertaining to languages that the employee can read, speak, write, translate, teach, and whether or not the language is their native language.

Now let’s explore the remaining three tabs in this section. Click the Next button to continue.
The second section of the Employee Record View chapter will focus on Transaction Information. We will explore information under the following tabs:

- Memos
- Attachments
- Audit Trail

Let’s explore the Memos feature. Click on the Memos tab.
The Memos tab allows you to enter memos that other users along the routing path of the transaction can read.

Enter the following text as a memo:

I can add a memo to a transaction.

Click Add to add the memo.
Notice that the memo is now included under the Memos tab. Users can add multiple memos if desired.

Now let’s explore the Attachments feature. Click the Attachments tab.
The Attachments feature allows you to upload documentation to a transaction. The next few slides will simulate an actual document attachment in the HR Front End.

Click the Add Attachment button.
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, click the **Delete** button.

**ATTACHMENTS TO BE UPLOADED**

<table>
<thead>
<tr>
<th>Title</th>
<th>Doc Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload</td>
<td>Done</td>
<td></td>
</tr>
</tbody>
</table>

To browse for documentation to attach, click the **Browse** button.
While in the File Upload window, click the selected document and then click the Open button.
Attach Document

1. Click **Browse** to select the file you want to attach.
2. Click **Add** to add the attachment to the list. Repeat this step for each file you want to attach.
3. Select the doc type from the drop-down list and provide a description in the text box below and click **Remove**.
4. Click **Upload** to upload the attachment to the training site.

**ATTACHMENTS TO BE UPLOADED**

<table>
<thead>
<tr>
<th>Title</th>
<th>Doc Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click the ADD button to add the documentation.
1. Click the highlighted Doc Type
2. Enter the word APPLICATION in the Description text box
3. Click the Upload button
If the upload was a success, a message appears at the top of the screen stating as such.

File (CCCApplication.doc) has been uploaded.

Click the Done button to continue.
Once you are taken back to the Employee Record View, you can see that the attachment has been successfully uploaded and you have several options of which you are able to View, Delete, or Add another attachment.

User can limit who can see this document by checking/unchecKing the box(es) under Viewable Orgs.

Click the Save button to continue.
Now that we have explored the Attachments feature, we will move on to the Audit Trail feature.

Let's explore the Audit Trail feature. Click the Audit Trail tab.
The Audit Trail feature allows you to track the changes that have been made along the routing path of a transaction.

You are able to see:
- What action was taken (Action)
- When it took place (Action Timestamp)
- Where the transaction has been, and where it will travel along the routing path (Stop)
- Who worked on the transaction (Owner)
- What changes took place (Changes/Notes)
One additional tab that might appear in the Employee Record View.
This tab contains information pertaining to the Federal Work Study.

<table>
<thead>
<tr>
<th>Award Year</th>
<th>Status</th>
<th>Offered</th>
<th>Accepted</th>
<th>Paid</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>1100WS, Federal Work Study</td>
<td>Accepted</td>
<td>$3,000.00</td>
<td>$3,000.00</td>
<td>0.00</td>
<td>$3,000.00</td>
</tr>
</tbody>
</table>

This tab contains information pertaining to the following:
- Aid Year associated with the Federal Work Study
- Awards associated with the Federal Work Study
- Jobs associated with the Federal Work Study
The Jobs tab provides information pertaining to jobs to which the employee holds at the University of Illinois. Similar to the Employee Information, Job information is condensed in an accordion layout. This is in order that users can expand one or more accordions to view particular data.

Let’s explore the Job Detail. Click the Job Detail accordion.
The first accordion under the Jobs tab is the Job Detail accordion. This accordion displays detailed information pertaining to an employee’s job at the University of Illinois.

Click the Job Labor Distribution accordion.
The second accordion under the Jobs tab is the Job Labor Distributions accordion. This accordion displays the labor distributions for the job listed.

Click the Position Data accordion.
The third accordion under the Jobs tab is the Position Data accordion. This accordion displays information pertaining to the position that an employee holds at the University of Illinois.

Click the Work Schedules accordion.
The fourth accordion under the Jobs tab is the Work Schedules accordion. This accordion displays information pertaining to a Civil Service employee’s work schedule for their job.

Click the Service Dates and Contract Parameters accordion.
The fifth accordion under the Jobs tab is the Service Dates & Contract Parameters accordion. This accordion displays the service dates and any contract parameters active on the selected date for the Employee Record.

Click the Default Earnings accordion.
The sixth accordion under the Jobs tab is the Default Earnings accordion. Initially, when a job is created, the earn codes tied to that job employee class will default. However, it does not re-default if the employee class is changed on the position or on the job. Therefore, it would have to be updated manually.

Click the Faculty Rank & Tenure accordion.
The seventh accordion under the Jobs tab is the Faculty Rank & Tenure accordion. This accordion displays information pertaining to faculty rank and tenure. If the employee were a faculty member, the Faculty Rank & Tenure Accordion would populate with information such as is displayed below.
You learned about information pertaining to:

- The Interface of the Employee Record View in the HR Front End
- The interrelatedness of other features in the application and the Employee Record View
Ch. 8 - Timeline View

You will learn about:

- The Interface of the Timeline View in the HR Front End
- How to access and use the Timeline View
In this chapter, we will explore how to utilize the Timeline View feature in the HR Front End. The Timeline View allows users to view an employee’s record over a period of time.

Click the Timeline View button to access the Timeline View feature.
Activity: Accessing Job information in the Timeline View

Users can view specific records by indicating so in the check boxes. Users can also use the <Previous and Next> links to navigate the Timeline View. Notice that the check boxes have been pre-selected. Follow the instructions below.

- Enter a Start Date of 08/16/2008
- Click the Refresh button to see results
Since the "Jobs I own" and "Job Changes" boxes were checked, the results appear that contain that information. Information that is displayed is dependent upon which boxes are checked.

Hover your mouse over the highlighted items to see the Job records in greater detail.

Double-click the green line to see a specific calendar date within the record.
Since the "Jobs I own" and "Job Changes" boxes were checked, the results appear that contain that information. Information that is displayed is dependent upon which boxes are checked.

Hover your mouse over the highlighted items to see the Job records in greater detail.

Double-click the green line to see a specific calendar date within the record.
Since the "Jobs I own" and "Job Changes" boxes were checked, the results appear that contain that information. Information that is displayed is dependent upon which boxes are checked.

Hover your mouse over the highlighted items to see the Job records in greater detail.

Double-click the green line to see a specific calendar date within the record.
When a date is selected, a pop-up box will appear that displays the date that was selected. Users can either click the ERV button to view the Employee Record View or click the Back button to return to the Timeline View.
You learned about information pertaining to:

- The Interface of the Timeline View in the HR Front End
- The functionalities of the Timeline View

Click Next to continue
You have reached the conclusion of the HR Front End Overview and Navigation Course. Feel free to review the quiz information and/or navigate to any section of this course. In order to certify your completion of this course, please click the COMPLETE COURSE button below.