

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.

Copyright

Copyright © 2020 University of Illinois System – Office of Business Services. All rights reserved. No part of this publication may be reproduced or used in any form or by any means—graphic, electronic or mechanical, including photocopying, recording, taping or in information storage and retrieval systems—without written permission of University of Illinois System.

Trademarks

Banner® is a trademark of Ellucian Company L.P. or its affiliates and is registered in the U.S and other countries.

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 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.

Welcome To:

Overview and Navigation Course

Estimated Time: 1 HOUR

UNIT
1

Click Next to
continue

< PREV

NEXT >



ADOBES CAPTIVATE™



Appropriate Use and Security of Confidential and Sensitive Information



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.

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.

Click Next to
continue

< PREV

NEXT >



CHAPTER	YOU WILL LEARN ABOUT
1 – The Home Page	<ul style="list-style-type: none"> Information displayed on the Home Page How to use the Home Page to navigate through the HR Front End Application
2 – Employee Search	<ul style="list-style-type: none"> The interface of the Employee Search feature How to perform an Employee Search
3 – Inboxes and Outboxes	<ul style="list-style-type: none"> The interface of the Inbox/Outbox feature The functionality of the Inbox/Outbox feature How to use the Inboxes/Outboxes
4 – Transactions	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> The interface of the Timeline View in the HR Front End Application How to access and use the Timeline View
9 – Course Review	<ul style="list-style-type: none"> You will be given a short series of questions that review the material that was covered in this course

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

Introduction To The HR Front End

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**

Click Next to
continue

< PREV

NEXT >



Ch. 1 - The Home Page

The screenshot displays the HR Front End Home Page. At the top is a navigation bar with links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this is a section titled 'ALERTS & MESSAGES' with sub-sections for HR and SYSTEM. A yellow callout box is overlaid on the HR section, containing the text 'You will learn about:' followed by two bullet points: 'Information displayed on the Home Page' and 'How to use the Home Page to navigate throughout the Front End'. Below the callout is a 'QUICK SEARCH' section with a 'UIN' input field and a 'Search' button. At the bottom is a 'RESOURCES' section with links to 'Employee Self Service', 'Human Resources Applications', and 'OBFS - Payroll'. A green callout box in the bottom right corner says 'Click Next to continue'. The bottom of the page features a navigation bar with '< PREV', 'NEXT >', and a 'TOC' button. The Adobe Captivate logo is visible in the bottom right corner.

Home Page

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

ALERTS & MESSAGES

HR

SYSTEM

QUICK SEARCH

UIN Search

RESOURCES

Employee Self Service
Human Resources Applications
OBFS - Payroll

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

< PREV NEXT >

TOC

ADOBE CAPTIVATE

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.

URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

Enterprise Application Login

(Important: DO NOT include "@uillinois.edu", "@uiuc.edu", "@uic.edu" or "@uis.edu" when entering your EnterpriseID)

1 EnterpriseID:

Password:

2

ATTENTION: FIRST-TIME USERS
of UI Enterprise applications! You must obtain your EnterpriseID and set up your Enterprise Password before you can use the applications.

Change Your Password

- [If you know your password, but would like to change it.](#)

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/UIUC & UIS) or (312) 996-4806 (UIC).

You can also e-mail the AITS Help Desk at helpdesk2@uillinois.edu

Enterprise Application Service, Version 2.0

Click Next to
continue

< PREV

NEXT >



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.

The screenshot shows the HR Front End Home Page. At the top is a navigation bar with the following links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below the navigation bar, there is a section for ALERTS & MESSAGES, a section for HR, a section for SYSTEM, a section for QUICK SEARCH with a UIN input field, and a section for RESOURCES with links to Employee Self Service, Human Resources App, and OBFS - Payroll. A yellow callout box points to the navigation bar and contains the following text:

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)

A green button labeled "Click Next to continue" is located at the bottom right of the callout box. The bottom of the screen shows a navigation bar with a "< PREV" button and a "NEXT >" button. The bottom right corner of the screen shows the Adobe Captivate logo.

In addition to the Navigation bar, the Home Page in the HR Front End contains additional elements to assist users.

The screenshot shows the HR Front End Home Page. At the top is a navigation bar with links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below the navigation bar is the main content area. On the left side of the main content area, there is a sidebar with the following sections: ALERTS & MESSAGES (containing HR and SYSTEM), QUICK SEARCH (with a UIN input field and a Search button), and RESOURCES (with links to Employee Self Service, Human Resources Applications, and OBFS - Payroll). A callout box points to the left-hand side of the screen and contains the following text:

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

At the bottom right of the main content area, there is a green button that says "Click Next to continue". At the bottom of the page, there is a navigation bar with buttons: < PREV, NEXT >, and a set of icons for navigation (back, forward, search, etc.). The Adobe Captivate logo is also visible in the bottom right corner.

CH.1 - Review Page

The screenshot displays the HR Front End Home Page interface. At the top, a navigation bar includes links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, the main content area is divided into sections: ALERTS & MESSAGES (with HR and SYSTEM subsections), QUICK SEARCH (with a UIN input field and a Search button), and RESOURCES (with links for Employee Self Service, Human Resources Applications, and OBFS - Payroll). A yellow callout box is overlaid on the ALERTS & MESSAGES section, containing the text: "In this chapter, you learned about information pertaining to:" followed by a bulleted list: "• The interface of the Home Page in the HR Front End" and "• The functionality of the Home Page in the HR Front End". A green callout box in the bottom right corner of the interface says "Click Next to continue". The bottom of the screen features a navigation bar with "< PREV" and "NEXT >" buttons, and a media control bar with icons for play, pause, and volume, along with the text "ADOBE CAPTIVATE™".

Home Page

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

ALERTS & MESSAGES

HR

SYSTEM

QUICK SEARCH

UIN Search

RESOURCES

[Employee Self Service](#)
[Human Resources Applications](#)
[OBFS - Payroll](#)

UNIVERSITY OF CALIFORNIA

Click Next to continue

< PREV NEXT >

ADOBE CAPTIVATE™

Ch. 2 - Employee Search

Employee Search

UN:	LAST NAME:	FIRST NAME:	USERID:	SSN:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

COA:
* - All

DEPARTMENT:
* - All

CAMPUS:
* - All

☒ INCLUDE TERMINATED EMPLOYEES

You will learn about:

- The interface of the Employee Search Feature
- How to perform an Employee Search

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

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

UIN:	LAST NAME:	FIRST NAME:	USERID:	SSN:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

COA:	COLLEGE:
* - All	* - All

DEPARTMENT:	ORGANIZATION:
* - All	* - All

CAMPUS:	EMPLOYEE GROUP:
* - All	* - All

☒ INCLUDE TERMINATED EMPLOYEES

Click Next to
continue

< PREV

NEXT >



Searching For Individuals

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

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

COA:
* - All

DEPARTMENT:
* - All

CAMPUS:
* - All

☒ INCLUDE TERMINATED EMP

Search Reset

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

< PREV

NEXT >



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.

The form is titled "Employee Search" and contains several input fields and drop-down menus. The fields are: UIN, LAST NAME, FIRST NAME, USERID, and SSN. Below these are four drop-down menus: COA, COLLEGE, DEPARTMENT, and ORGANIZATION. Each of these four drop-down menus is highlighted with a red rectangular border. Below these are two more drop-down menus: CAMPUS and EMPLOYEE GROUP, which are also highlighted with red rectangular borders. At the bottom left of the form is a checkbox labeled "INCLUDE TERMINATED EMPLOYEES" which is checked. Below the checkbox are two buttons: "Search" and "Reset". A green callout box with a pointer to the highlighted drop-down menus contains the text: "Hover your mouse over the outlined drop-down lists to see examples of what types of items will be displayed."

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

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.

The screenshot shows the 'Employee Search' form. At the top, there are input fields for UIN, LAST NAME, FIRST NAME, USERID, and SSN. Below these are four drop-down menus: COA, COLLEGE, ORGANIZATION, and EMPLOYEE GROUP. The COA menu is open, showing a list of options: '* - All', '1 - University of Illinois - Urbana', '2 - University of Illinois - Chicago', '4 - University of Illinois - Springfield', '7 - University of Illinois - Global', and '9 - University of Illinois - Admin'. The COLLEGE, ORGANIZATION, and EMPLOYEE GROUP menus are also visible, each with a red outline. A green callout box with a pointer to the COA menu contains the text: 'Hover your mouse over the outlined drop-down lists to see examples of what types of items will be displayed.' At the bottom of the form, there is a checkbox for 'INCLUDE TERMINATED EMPLOYEES' and two buttons: 'Search' and 'Reset'.

Employee Search

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

COA: COLLEGE:

* - All
1 - University of Illinois - Urbana
2 - University of Illinois - Chicago
4 - University of Illinois - Springfield
7 - University of Illinois - Global
9 - University of Illinois - Admin

* - All

ORGANIZATION:

* - All

EMPLOYEE GROUP:

* - All

☒ INCLUDE TERMINATED EMPLOYEES

Search Reset

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

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

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.

The form is titled "Employee Search" and contains several input fields and dropdown menus. The fields are: UIN:, LAST NAME:, FIRST NAME:, USERID:, and SSN:. Below these are four dropdown menus: COA:, COLLEGE:, DEPARTMENT:, and ORGANIZATION:. The DEPARTMENT: dropdown is open, showing a list of departments including "335 - Education Administration", "418 - Bureau Educational Research", "541 - Council Teacher Ed Admin", "570 - Special Education", "613 - Curriculum and Instruction", "616 - Educational Psychology", "617 - Education General Expen", "640 - Educational Policy Studies", "674 - Ed Organization and Leadership", "676 - Center for Study of Reading", and "760 - Human Resource Education". A callout box with a green background and black text points to the DEPARTMENT: dropdown, stating: "over the outlined drop-down of what types of items will be displayed." There is also a red box around the "EMPLOYEE GROUP:" dropdown, which has a value of "* - All".

Employee Search

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

COA: * - All

COLLEGE: * - All

DEPARTMENT: * - All

335 - Education Administration
418 - Bureau Educational Research
541 - Council Teacher Ed Admin
570 - Special Education
613 - Curriculum and Instruction
616 - Educational Psychology
617 - Education General Expen
640 - Educational Policy Studies
674 - Ed Organization and Leadership
676 - Center for Study of Reading
760 - Human Resource Education

ORGANIZATION: * - All

EMPLOYEE GROUP: * - All

over the outlined drop-down of what types of items will be displayed.

Click Next to
continue

< PREV

NEXT >



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.

The image shows a screenshot of the 'Employee Search' form. The form includes input fields for UIN, LAST NAME, FIRST NAME, USERID, and SSN. Below these are several drop-down menus for filtering: COA, COLLEGE, DEPARTMENT, ORGANIZATION, CAMPUS, and EMPLOYEE GROUP. The 'CAMPUS' drop-down menu is open, showing a list of options: '* - All', 'C - UIC Chicago', 'G - UIC Global', 'S - UIS Springfield', and 'U - UIUC Urbana / Champaign'. A red box highlights the 'CAMPUS' drop-down menu, and a green callout box points to it with the text: 'Over the outlined drop-down lists to see examples of what types of items will be displayed.'

UNIV
of
ILLINOISClick Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

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.

The form is titled "Employee Search" and contains several input fields and dropdown menus. The fields are: UIN, LAST NAME, FIRST NAME, USERID, and SSN. Below these are three dropdown menus: COA, DEPARTMENT, and CAMPUS, each with a red border and a dropdown arrow. The COA dropdown is currently set to "* - All". The DEPARTMENT dropdown is also set to "* - All". The CAMPUS dropdown is set to "* - All". Below these is a checkbox labeled "INCLUDE TERMINATED EMPLOYEES" which is checked. There are "Search" and "Reset" buttons. To the right of the dropdowns is a list of colleges, each preceded by a code: KL - Agr Consumer & Env Sciences, KM - College of Business, KN - Education, KP - Engineering, KR - Fine & Applied Arts, KS - Graduate College, KT - College of Media, KU - Law, KV - Liberal Arts & Sciences, KW - Division of General Studies, KY - Applied Health Sciences, LB - Medicine at UIUC, LC - Veterinary Medicine, LD - Armed Forces, LE - Institute of Aviation, LF - Public Safety, LG - Labor & Industrial Relations, LH - Beckman Institute, and LJ - Inst for Environ Studies. A green callout box with the text "Hover your mouse over the dropdown lists to see examples" points to the dropdown menus. Another green callout box with the text "Click Next to continue" points to the "NEXT >" button.

Employee Search

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

COA: * - All

DEPARTMENT: * - All

CAMPUS: * - All

☒ INCLUDE TERMINATED EMPLOYEES

Search Reset

COLLEGE:

- * - All
- KL - Agr Consumer & Env Sciences
- KM - College of Business
- KN - Education
- KP - Engineering
- KR - Fine & Applied Arts
- KS - Graduate College
- KT - College of Media
- KU - Law
- KV - Liberal Arts & Sciences
- KW - Division of General Studies
- KY - Applied Health Sciences
- LB - Medicine at UIUC
- LC - Veterinary Medicine
- LD - Armed Forces
- LE - Institute of Aviation
- LF - Public Safety
- LG - Labor & Industrial Relations
- LH - Beckman Institute
- LJ - Inst for Environ Studies

UNIVERSITY OF ILLINOIS

Click Next to continue

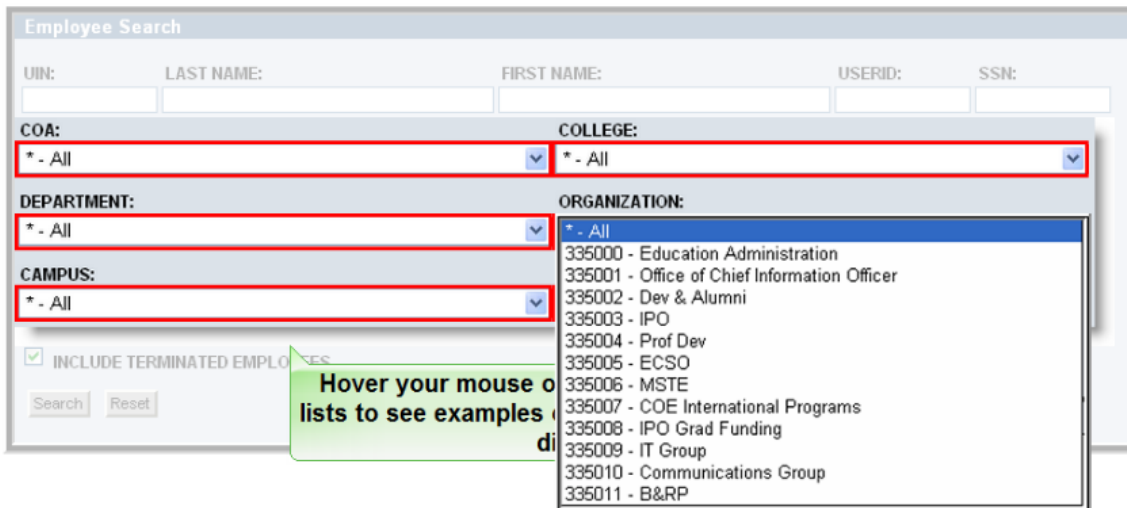
< PREV

NEXT >



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.



The form is titled "Employee Search" and contains several input fields and dropdown menus. Red boxes highlight the "COA:", "COLLEGE:", "DEPARTMENT:", and "CAMPUS:" dropdown menus, all of which are currently set to "* - All". A green callout box with the text "Hover your mouse over these lists to see examples of departments" points to the "DEPARTMENT:" dropdown. Another green callout box with the text "Click Next to continue" points to the "NEXT >" button at the bottom right. The "ORGANIZATION:" dropdown is open, showing a list of departments with their IDs. A checkbox labeled "INCLUDE TERMINATED EMPLOYEES" is checked. "Search" and "Reset" buttons are located at the bottom left of the form.

Field	Value
UIN:	
LAST NAME:	
FIRST NAME:	
USERID:	
SSN:	
COA:	* - All
COLLEGE:	* - All
DEPARTMENT:	* - All
CAMPUS:	* - All
INCLUDE TERMINATED EMPLOYEES	<input checked="" type="checkbox"/>
Search	Reset

ORGANIZATION:

- * - All
- 335000 - Education Administration
- 335001 - Office of Chief Information Officer
- 335002 - Dev & Alumni
- 335003 - IPO
- 335004 - Prof Dev
- 335005 - ECSO
- 335006 - MSTE
- 335007 - COE International Programs
- 335008 - IPO Grad Funding
- 335009 - IT Group
- 335010 - Communications Group
- 335011 - B&RP

< PREV

NEXT >



ADOBE CAPTIVATE™

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.

The screenshot shows the 'Employee Search' form with several fields and drop-down menus. Red boxes highlight the 'COA:', 'COLLEGE:', 'DEPARTMENT:', 'ORGANIZATION:', and 'CAMPUS:' drop-down menus, all of which are currently set to '* - All'. A green callout box with the text 'Hover your mouse over these lists to see examples' points to the 'EMPLOYEE GROUP:' drop-down menu, which is open and displays a list of employee groups: A - Faculty and Other Academics, B - Academic Professionals, C - Civil Service Web/Dpt Tm Entry, D - Civil Service Time Rpt Feeder, E - Civil Service Extra Help, G - Grads and Predoc Fellows, H - Academic Hourly & Grad Hourly, L - Lump Sum, M - Summer, P - Postdoc Fellow/ResAssoc/Intm, R - Residents, S - Student, T - Retiree/Annuitant, U - Unpaid, V - Virtual, and W - One-time. Another green callout box with the text 'Next to the next button' points to the 'NEXT >' button. The form also includes input fields for 'UIN:', 'LAST NAME:', 'FIRST NAME:', 'USERID:', and 'SSN:', a checkbox for 'INCLUDE TERMINATED EMPLOYEES', and 'Search' and 'Reset' buttons. Navigation buttons '< PREV' and 'NEXT >' are at the bottom of the form.

Employee Search

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

COA: * - All

COLLEGE: * - All

DEPARTMENT: * - All

ORGANIZATION: * - All

CAMPUS: * - All

EMPLOYEE GROUP: * - All

A - Faculty and Other Academics
B - Academic Professionals
C - Civil Service Web/Dpt Tm Entry
D - Civil Service Time Rpt Feeder
E - Civil Service Extra Help
G - Grads and Predoc Fellows
H - Academic Hourly & Grad Hourly
L - Lump Sum
M - Summer
P - Postdoc Fellow/ResAssoc/Intm
R - Residents
S - Student
T - Retiree/Annuitant
U - Unpaid
V - Virtual
W - One-time

☒ INCLUDE TERMINATED EMPLOYEES

Search Reset

< PREV

NEXT >

Hover your mouse over these lists to see examples

Next to the next button

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.

Employee Search

UIN:	LAST NAME:	FIRST NAME:	USERID:	SSN:
	<input type="text" value="Enter Last Name"/>	<input type="text" value="Enter First Name"/>		

COA:	COLLEGE:
2- University of Illinois - Chicago	FM - Healthcare System, UIC - DSCC

DEPARTMENT:	ORGANIZATION:
496 - Div of Specializ Care for Chil	496000 - Div of Specializ Care for Chil

CAMPUS:	EMPLOYEE GROUP:
* - All	* - All

☐ INCLUDE TERMINATED EM

Enter the following information in the text fields:

Last Name:
First Name:

Click the **Search** button to continue

UNIVERSITY OF ILLINOIS
SCHOOL OF COMMUNITY & SOCIAL SERVICES

< PREV

NEXT >

ADOBIE® CAPTIVATE™

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

Employee Search

UIN: 111111111 LAST NAME: FIRST NAME: USERID: SSN: 222222222

COA: 2 - University of Illinois - Chicago COLLEGE: CHS - Healthcare Center HS - DSO

DEPARTMENT: 496 - Div of Specializ C

CAMPUS: * - All

☒ INCLUDE TERMINATED

Search Reset

To Select the Employee Record:

- Double-click on the desired search result, or
- Click the desired result and then the Select button.

Select:

UIN	Last Name	First Name	E-Class	Emp Status	Home ORG	Trans
111111111			CA - CS 75H/pay N/E Ben Elg	A	C-2-496000 - Div of Specializ Care for Chil	No

UNIVERSITY OF ILLINOIS

< PREV

NEXT >

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.

Employee Record View

111111111	1499008 A/TS ITPC	ECLS: BA	Total FTE: 0.870	Base Salary: \$30,903.75	Total Salary: \$30,903.75
-----------	-------------------	----------	------------------	--------------------------	---------------------------

Full View: No Transaction: Readonly: BioDemoAccess: JobAccess: [U22218 00]

DATE: View

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

EMPLOYEE GENERAL INFORMATION

JOBS

U22218-09: TRAINING SPEC	ECLS: BA	TS ORG: 9-699008	TYPE: P	FTE: 0.870	MTHLY: \$2,575.31	BEGIN: 6/4/2007	END: 5/30/2008	BGT PRO: X	STATUS: A
--------------------------	----------	------------------	---------	------------	-------------------	-----------------	----------------	------------	-----------

UNIVERSITY OF CALIFORNIA

Click Next to continue

< PREV NEXT >

ADOBIE CAPTIVATE

Ch. 2 - Review Page

Employee Search

UIN:	LAST NAME:	FIRST NAME:	USERID:	SSN:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
COA:				<input type="text"/>
* - All				<input type="text"/>
DEPARTMENT:				<input type="text"/>
* - All				<input type="text"/>
CAMPUS:				<input type="text"/>
* - All				<input type="text"/>
<input checked="" type="checkbox"/> INCLUDE TERMINATED EMPLOYEES				
<input type="button" value="Search"/> <input type="button" value="Reset"/>				

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

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

Ch. 3 - Inboxes and Outboxes

The screenshot shows a web application titled "Transactions". At the top, there are four radio buttons: "MY INBOX", "GROUP INBOXES", "MY OUTBOX", and "GROUP OUTBOXES". Below this, there are two sections: "PERSONAL PRESET IN USE:" and "CRITERIA FOR LISTED TRANSACTIONS:". The "PERSONAL PRESET IN USE:" section has a dropdown menu currently set to "- None -" and a button ">>Show Filter and Preset Chooser<<". The "CRITERIA FOR LISTED TRANSACTIONS:" section has three dropdown menus: "Route Stop Date", "F Ground", and "College". Below these are three buttons: "Refresh List", "Take Ownership", and "Release". At the bottom left, there are three buttons: "Select", "Tran ID", and "Stop ID". At the bottom right, there are two buttons: "Owned By" and "Completed". A yellow callout box is overlaid on the center of the interface, containing the text "You will learn about information pertaining to:" followed by a bulleted list.

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

< PREV

NEXT >



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 screenshot shows the 'Transactions' interface. At the top, there are four radio buttons: 'MY INBOX', 'GROUP INBOXES', 'MY OUTBOX', and 'GROUP OUTBOXES'. Below these, a 'PERSONAL PRESET IN USE:' dropdown menu is set to '- None -'. A button '>>Show Filter and Preset Chooser<<' is next to it. Below the dropdown, there are three buttons: 'Refresh List', 'Take Ownership', and 'Release C'. At the bottom left, there are three buttons: 'Select', 'Tran ID', and 'Stop ID'. On the right side, there is a table with two columns: 'Owned By' and 'Completed'. A yellow callout box is overlaid on the interface, containing the text 'The Inbox and Outbox views provide users with an efficient way to:' followed by a bulleted list of five points.

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

< PREV

NEXT >



In/Outbox Radio Buttons

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.

The screenshot displays the HR Front End interface. At the top, there are four radio buttons: **MY INBOX**, **GROUP INBOXES**, **MY OUTBOX**, and **GROUP OUTBOXES**. The **MY INBOX** and **MY OUTBOX** buttons are highlighted with red boxes. Below these buttons, there are two sections: "PERSONAL PRESET IN USE:" and "CRITERIA FOR LISTED TRANSACTIONS:". The "PERSONAL PRESET IN USE:" section includes a dropdown menu set to "- None -" and a button labeled ">>Show Filter and Preset Chooser<<". The "CRITERIA FOR LISTED TRANSACTIONS:" section contains several dropdown menus: "Route Stop Role:", "Route Stop Level:", "Transaction Type:", "E-Group:", "Campus:", "COA:", "College:", "Department:", and "Organization:". Below these sections, there are buttons for "Refresh List", "Take Ownership", "Release Ownership", and "Select". A table with various columns is visible, including "Select", "Tran ID", "Stop ID", "Route Stop", "Tran Type", "UIN", "Last Name", "First Name", "Empl Group", "Home Org", "Owned By", and "Completed". A green callout box with red text says: "Hover your mouse over the outlined Inbox and Outbox radio buttons."

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

In/Outbox Radio Buttons

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.

The screenshot displays the HR Front End interface. At the top, there are four radio buttons: **MY INBOX**, **GROUP INBOXES**, **MY OUTBOX**, and **GROUP OUTBOXES**. The **MY INBOX** and **MY OUTBOX** buttons are highlighted with red boxes. Below these buttons is a yellow callout box that says "My Inbox: Displays the transactions which a user owns and has permissions". To the right of this callout are dropdown menus for "College:", "Department:", "COA:", and "Organization:". Below these are buttons for "Refresh List", "Take Ownership", "Release Ownership", and "Select". A table with the following columns is visible: **Select**, **Tran ID**, **Stop ID**, **Route Stop**, **Tran Type**, **UIN**, **Last Name**, **First Name**, **Empl Group**, **Home Org**, **Owned By**, and **Completed**. A green callout box at the bottom of the interface says "Hover your mouse over the outlined Inbox and Outbox radio buttons."

Click Next to
continue

< PREV

NEXT >



100



ADOBE CAPTIVATE™

In/Outbox Radio Buttons

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.

Click Next to
continue

< PREV

NEXT >



In/Outbox Radio Buttons

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.

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

In/Outbox Radio Buttons

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.

The screenshot displays the HR Front End interface. At the top, there are four radio buttons: **MY INBOX**, **GROUP INBOXES**, **MY OUTBOX**, and **GROUP OUTBOXES**. The **GROUP INBOXES** and **GROUP OUTBOXES** buttons are highlighted with red boxes. Below the radio buttons, there is a section for "PERSONAL PRESET IN USE:" with a dropdown menu set to "- None -". To the right, there is a section for "CRITERIA FOR LISTED TRANSACTIONS" with dropdowns for "Route Stop Role:", "Route Stop Level:", and "Transaction Type:". Below these are buttons for "Refresh List", "Take Ownership", "Release Ownership", and "Select". A table is visible with columns for "Select", "Tran ID", "Stop ID", "Route Stop", and "Tran Type". A yellow callout box titled "Group Outboxes:" explains that this view allows users to see the status of all transactions processed by themselves or other users with the same security permissions. It lists two types of transactions: those the user worked on (had ownership of) and those that were in the Group Inbox at one time but the user did not "own". A green callout box at the bottom of the interface says "Hover your mouse over the outlined Inbox and Outbox radio buttons."

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"

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

Click Next to
continue

< PREV

NEXT >



ADOBE CAPTIVATE™

In/Outbox Presets

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

The screenshot displays the 'Transactions' interface with the following elements:

- Navigation Tabs:** MY INBOX, GROUP INBOXES, MY OUTBOX, GROUP OUTBOXES.
- PERSONAL PRESET IN USE:** A dropdown menu currently showing '- None -'.
- >>Show Filter and Preset Chooser<<** A button to toggle the filter/preset panel.
- CRITERIA FOR LISTED TRANSACTIONS:** A grid of filter criteria:

Route Stop Role: *	E-Group: *	College: *
Route Stop Level: *	Campus: *	Department: *
Transaction Type: *	COA: *	Organization: *
- Action Buttons:** Refresh List, Take Ownership, Release Ownership, Select.
- Table Headers:** Select, Tran ID, Stop ID, Route Stop, Tran Type, UIN, Last Name, First Name, Empl Group, Home Org, Owned By, Completed.

A green callout box with red text states: "Hover your mouse over the outlined Filter and Preset items".

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

In/Outbox Presets

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

The screenshot shows a web application interface for managing transactions. At the top, there are radio buttons for 'MY INBOX', 'GROUP INBOXES', 'MY OUTBOX', and 'GROUP OUTBOXES'. Below these, there are two main sections: 'PERSONAL PRESET IN USE:' and 'CRITERIA FOR LISTED TRANSACTIONS:'. The 'PERSONAL PRESET IN USE:' section has a dropdown menu currently set to '- None -' and buttons for '>>Show Filter and Preset Cho...', 'Refresh List', and 'Take Ownersh...'. The 'CRITERIA FOR LISTED TRANSACTIONS:' section contains several dropdown menus for 'Route Stop Role', 'Route Stop Level', 'E-Group', 'Campus', 'College', and 'Department'. A yellow callout box titled 'Personal Preset in Use:' explains that users can select from a list of presets to filter transactions. Below the filters is a table with columns: 'Select', 'Tran ID', 'Stop ID', 'Org', 'Owned By', and 'Completed'. The table is currently empty. A green callout box at the bottom of the interface says 'Hover your mouse over the outlined Filter and Preset items'.

Select	Tran ID	Stop ID	Org	Owned By	Completed
--------	---------	---------	-----	----------	-----------

Click Next to
continue

< PREV

NEXT >



In/Outbox Presets

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

The screenshot displays the 'Transactions' interface with the following elements:

- Navigation Tabs:** MY INBOX, GROUP INBOXES, MY OUTBOX, GROUP OUTBOXES.
- PERSONAL PRESET IN USE:** A dropdown menu currently showing '- None -'.
- CRITERIA FOR LISTED TRANSACTIONS:** A table with the following fields:

Route Stop Role: *	E-Group: *	College: *
Route Stop Level: *	Campus: *	Department: *
Transaction Type: *	COA: *	Organization: *
- Buttons:** '>>Show Filter and Preset Chooser<<', 'Refresh List', and 'Take'.
- Table Headers:** Select, Tran ID, [unclear], [unclear], Home Org, Owned By, Completed.

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

< PREV

NEXT >



ADOBE® CAPTIVATE™

In/Outbox Presets

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

The screenshot shows the 'Transactions' interface with the following components:

- Navigation:** MY INBOX, GROUP INBOXES, MY OUTBOX, GROUP OUTBOXES.
- PERSONAL PRESET IN USE:** A dropdown menu currently set to '- None -'.
- CRITERIA FOR LISTED TRANSACTIONS:** A table of filters:

Route Stop Role: *	E-Group: *	College: *
Route Stop Level: *	Campus: *	Department: *
Transaction Type: *	COA: *	Organization: *
- Buttons:** Refresh List, Take Ownership, Release Ownership, Select.
- Table Headers:** First Name, Empl Group, Home Org, Owned By, Completed.

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.

Click Next to
continue

< PREV

NEXT >



In/Outbox Presets

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

The screenshot displays the 'Transactions' interface with the following elements:

- Navigation Tabs:** MY INBOX, GROUP INBOXES, MY OUTBOX, GROUP OUTBOXES.
- PERSONAL PRESET IN USE:** A dropdown menu currently set to '- None -'.
- CRITERIA FOR LISTED TRANSACTIONS:** A table of filter criteria:

Route Stop Role:	*	E-Group:	*	College:	*
Route Stop Level:	*	Campus:	*	Department:	*
Transaction Type:	*	COA:	*	Organization:	*
- Action Buttons:** Refresh List, Take Ownership, Release Ownership, Select.
- Table Headers:** Select, Tran ID, Stop ID, Route Stop.

A yellow callout box states: **Criteria for listed transactions:** This displays the preset criteria that is currently being used to filter the list of displayed transactions.

A green callout box at the bottom states: **Hover your mouse over the outlined Filter and Preset items**

Click Next to
continue

< PREV

NEXT >



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.

The screenshot displays the 'Transactions' interface with various filter and preset controls. At the top, there are radio buttons for 'MY INBOX', 'GROUP INBOXES', 'MY OUTBOX', and 'GROUP OUTBOXES'. Below this, a 'PERSONAL PRESET IN USE:' dropdown is set to '- None -'. To the right, a table lists 'CRITERIA FOR LISTED TRANSACTIONS:' with fields for Route Stop Role, E-Group, College, Route Stop Level, Campus, Department, Transaction Type, COA, and Organization, all set to '*'. A 'SELECT A PRESET:' dropdown is also set to '- None -'. Next to it is a 'PRESET NAME:' field and a 'MAKE DEFAULT' checkbox. A row of buttons includes 'Add as Preset', 'Save Updated', 'Delete Preset', 'Filter List', and 'Reset Filter'. Below these are several dropdown menus for 'TRANS TYPE:', 'ROUTE STOP ROLE:', 'ROUTE STOP ACTION:', 'ROUTE STOP LEVEL:', 'E-GROUP:', 'CAMPUS:', 'COA:', 'COLLEGE:', 'DEPARTMENT:', and 'ORGANIZATION:', all set to '* - All'. A green callout box with the text 'Hover your mouse over the outlined Filter and Preset items' points to the 'Filter List' and 'Reset Filter' buttons. At the bottom right, another green callout box says 'Click Next to continue'. The interface includes a 'UNIV' logo and navigation buttons like '< PREV' and 'NEXT >'. The bottom of the screen shows a presentation control bar with 'ADOBE CAPTIVATE' branding.

Transactions

MY INBOX GROUP INBOXES MY OUTBOX GROUP OUTBOXES

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

CRITERIA FOR LISTED TRANSACTIONS:

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

SELECT A PRESET:
- None -

PRESET NAME: ☐ MAKE DEFAULT

Add as Preset Save Updated Delete Preset Filter List Reset Filter

TRANS TYPE: * - All ROUTE STOP ROLE: * - All ROUTE STOP ACTION: * - All ROUTE STOP LEVEL: * - All E-GROUP: * - All UIN:

CAMPUS: * - All COA: * - All COLLEGE: * - All DEPARTMENT: * - All ORGANIZATION: * - All

Hover your mouse over the outlined Filter and Preset items

Click Next to continue

< PREV NEXT >

ADOBE CAPTIVATE™

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.

The screenshot displays the 'Transactions' page in the HR Front End. At the top, there are radio buttons for 'MY INBOX', 'GROUP INBOXES', 'MY OUTBOX', and 'GROUP OUTBOXES'. Below this, the 'PERSONAL PRESET IN USE:' section shows a dropdown menu currently set to '- None -'. To the right, the 'CRITERIA FOR LISTED TRANSACTIONS:' section contains a table of filter criteria:

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

Below the criteria table, there is a 'SELECT A PRESET:' dropdown menu, also set to '- None -'. To its right is a 'PRESET NAME:' text field and a 'MAKE DEFAULT' checkbox. Further right are several buttons: 'Add as Preset', 'Save Updated', 'Delete Preset', 'Filter List', and 'Reset Filter'. A yellow callout box points to the 'SELECT A PRESET:' dropdown with the text: 'Select a Preset: This drop-down allows users to select a preset that has been previously created and apply it as a filter to the transaction list.' A green callout box points to the 'Filter List' and 'Reset Filter' buttons with the text: 'Hover your mouse over the outlined Filter and Preset items'. In the bottom right corner, a green callout box says: 'Click Next to continue'. The page footer includes navigation buttons '< PREV' and 'NEXT >', a progress bar, and the Adobe Captivate logo.

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.

The screenshot displays the 'Transactions' interface with various filter and preset controls. A red box highlights the 'SELECT A PRESET:' dropdown menu, which currently shows '- None -'. Another red box highlights the 'MAKE DEFAULT' checkbox. A yellow callout box points to the 'MAKE DEFAULT' checkbox with the text: 'Once users have selected or created a preset, they can check this box to enable a particular preset to be the default setting for the In/Outbox transaction list.' A green callout box points to the 'Filter List' and 'Reset Filter' buttons with the text: 'Hover your mouse over the outlined Filter and Preset items'. A green callout box at the bottom right says 'Click Next to continue'. The interface includes tabs for 'MY INBOX', 'GROUP INBOXES', 'MY OUTBOX', and 'GROUP OUTBOXES'. Below these are sections for 'PERSONAL PRESET IN USE' and 'CRITERIA FOR LISTED TRANSACTIONS'. The 'CRITERIA' section includes a table with filters for Route Stop Role, E-Group, College, Route Stop Level, Campus, Department, Transaction Type, COA, and Organization. The 'PERSONAL PRESET' section includes a dropdown for 'SELECT A PRESET:' and a 'MAKE DEFAULT' checkbox. The 'CRITERIA' section also includes a 'MAKE DEFAULT' checkbox. The 'TRANSACTIONS' list shows a table with columns for TRANS TYPE, ROUTE STOP ROLE, ROUTE STOP, CAMPUS, and COA. The bottom of the screen features a navigation bar with 'PREV' and 'NEXT' buttons, and a footer with 'UNIV' and 'ADOBE CAPTIVATE' logos.

Transactions

MY INBOX GROUP INBOXES MY OUTBOX GROUP OUTBOXES

PERSONAL PRESET IN USE:

- None -

>>Hide Filter and Preset Chooser<<

CRITERIA FOR LISTED TRANSACTIONS:

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

SELECT A PRESET:

- None -

PRESET NAME:

☐ MAKE DEFAULT

Add as Preset Save Updated Delete Preset Filter List Reset Filter

Make Default:

Once users have selected or created a preset, they can check this box to enable a particular preset to be the default setting for the In/Outbox transaction list.

Hover your mouse over the outlined Filter and Preset items

Click Next to continue

UNIV

ADOBE CAPTIVATE

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.

The screenshot displays the 'Transactions' page in the HR Front End. At the top, there are radio buttons for 'MY INBOX', 'GROUP INBOXES', 'MY OUTBOX', and 'GROUP OUTBOXES'. Below this, the 'PERSONAL PRESET IN USE:' section shows a dropdown menu currently set to '- None -'. To the right, the 'CRITERIA FOR LISTED TRANSACTIONS:' section contains a table with filter criteria:

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

Below the criteria table, there is a 'SELECT A PRESET:' dropdown menu, also set to '- None -'. To its right is a 'PRESET NAME:' text field and a 'MAKE DEFAULT' checkbox. Further right are several buttons: 'Add as Preset', 'Save Updated', 'Delete Preset', 'Filter List', and 'Reset Filter'. A yellow callout box points to the 'Add as Preset' button with the text: 'Add as Preset: Once users have selected the desired criteria that will serve as a filter, they can add those particular settings as a preset by clicking this button.' A green callout box points to the 'Filter List' button with the text: 'Click Next to continue'. At the bottom of the page, there are navigation buttons: '< PREV' and 'NEXT >'. The Adobe Captivate logo is visible in the bottom right corner.

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.

Transactions

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

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

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

SELECT A PRESET:
 - None -

PRESET NAME:

☐ MAKE DEFAULT

TRANS TYPE: * - All

CAMPUS: * - All

GROUP: All

UIN:

DEPARTMENT:

ORGANIZATION: * - All

UNIVERSITY OF ILLINOIS - GLOBAL

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

< PREV NEXT >

ADOBES CAPTIVATE™

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.

Transactions

MY INBOX GROUP INBOXES MY OUTBOX GROUP OUTBOXES

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

CRITERIA FOR LISTED TRANSACTIONS:

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

SELECT A PRESET:
- None -

PRESET NAME: ☐ MAKE DEFAULT

Add as Preset Save Updated Delete Preset Filter List Reset Filter

TRANS TYPE: * - All

CAMPUS: * - All

COA: * - All

COLLEGE: * - All

DEPARTMENT: * - All

ORGANIZATION: * - All

UIN:

UNIV

Click Next to continue

< PREV NEXT >

ADOBE CAPTIVATE™

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.

The screenshot shows the 'Transactions' interface with several annotations:

- SELECT A PRESET:** A red box highlights the dropdown menu showing '- None -'.
- MAKE DEFAULT:** A red box highlights the checkbox and label.
- Filter List:** A yellow callout box with the text: "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:** A green callout box with red text pointing to the 'Filter List' and 'Preset Name' areas.
- Click Next to continue:** A green callout box with red text pointing to the 'NEXT >' button.

The interface includes tabs for 'MY INBOX', 'GROUP INBOXES', 'MY OUTBOX', and 'GROUP OUTBOXES'. It also features a 'PERSONAL PRESET IN USE:' dropdown, a 'CRITERIA FOR LISTED TRANSACTIONS:' table, and a 'PRESET NAME:' field. The table lists criteria such as Route Stop Role, E-Group, College, Route Stop Level, Campus, Department, Transaction Type, COA, and Organization. The 'Filter List' button is located next to the 'Preset Name' field.

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.

The screenshot shows the 'Transactions' interface with several annotations:

- SELECT A PRESET:** A red box highlights the dropdown menu showing '- None -'.
- MAKE DEFAULT:** A red box highlights the 'MAKE DEFAULT' button.
- Reset Filter:** A yellow callout box points to the 'Reset Filter' button, stating: 'Users can click this button to reset all of the search criteria categories to their default settings.'
- Hover your mouse over the outlined Filter and Preset items:** A green callout box points to the filter and preset selection areas.
- Click Next to continue:** A green callout box points to the 'NEXT >' button.

The interface includes sections for 'PERSONAL PRESET IN USE:', 'CRITERIA FOR LISTED TRANSACTIONS:', and a list of transactions with filters for TRANS TYPE, ROUTE STOP ROLE, ROUTE STOP AC, CAMPUS, and COA. The bottom of the screen features navigation buttons like '< PREV' and 'NEXT >', and a status bar with 'ADOBE CAPTIVATE'.

Selecting Filter Criteria

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

Transactions

MY INBOX GROUP INBOX

PERSONAL PRESET IN USE:

- None -

>>Hide Filter and Preset Chooser<<

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

SELECT A PRESET: PRESET NAME:

- None -

☐ MAKE DEFAULT Add as Preset Save Updated Delete Preset Filter List Reset Filter

TRANS TYPE:	ROUTE STOP ROLE:	ROUTE STOP ACTION:	ROUTE STOP LEVEL:	E-GROUP:	UIN:
* - All	* - All	* - All	* - All	* - All	

CAMPUS:	COA:	COLLEGE:	DEPARTMENT:	ORGANIZATION:
* - All	* - All	* - All	* - All	* - All
	1 - University of Illinois - Urbana			
	2 - University of Illinois - Chicago			
	4 - University of Illinois - Springfield			
	7 - University of Illinois - Global			

Click Next to continue

< PREV

NEXT >



ADOBE CAPTIVATE™

Selecting Filter Criteria

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.

Transactions

MY INBOX GROUP INBOX

PERSONAL PRESET IN USE:

- None -

>>Hide Filter and Preset Chooser<<

Route Stop Role: * E-Group: * College: *

Route Stop Level: * Campus: * Department: *

Transaction Type: * COA: * Organization: *

SELECT A PRESET: PRESET NAME:

- None -

☐ MAKE DEFAULT Add as Preset Save Updated Delete Preset Filter List Reset Filter

TRANS TYPE:	ROUTE STOP ROLE:	ROUTE STOP ACTION:	ROUTE STOP LEVEL:	E-GROUP:	UIN:
* - All	* - All	* - All	* - All	* - All	

Trans Type:

Allows users to choose from a list of transaction types

COLLEGE:	DEPARTMENT:	ORGANIZATION:
* - All	* - All	* - All

Hover your mouse over the outlined Filter and Preset items

Click Next to continue

< PREV

NEXT >



ADOBE CAPTIVATE™

Selecting Filter Criteria

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

Transactions

MY INBOX GROUP INBOX

PERSONAL PRESET IN USE:

- None -

>>Hide Filter and Preset Chooser<<

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

SELECT A PRESET: PRESET NAME:

- None -

☐ MAKE DEFAULT Add as Preset Save Updated Delete Preset Filter List Reset Filter

TRANS TYPE:	ROUTE STOP ROLE:	ROUTE STOP ACTION:	ROUTE STOP LEVEL:	E-GROUP:	UIN:
* - All	* - All	* - All	* - All	* - All	

CAMPUS:	COA:
* - All	* - All
	1 - University of Illinois
	2 - University of Illinois
	4 - University of Illinois
	7 - University of Illinois

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

< PREV

NEXT >



Selecting Filter Criteria

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

Transactions

MY INBOX GROUP INBOX

PERSONAL PRESET IN USE:

- None -

>>Hide Filter and Preset Chooser<<

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

SELECT A PRESET: PRESET NAME:

- None -

☐ MAKE DEFAULT Add as Preset Save Updated Delete Preset Filter List Reset Filter

TRANS TYPE:	ROUTE STOP ROLE:	ROUTE STOP ACTION:	ROUTE STOP LEVEL:	E-GROUP:	UIN:
* - All	* - All	* - All	* - All	* - All	

CAMPUS:	COA:	E-Group:	ORGANIZATION:
* - All	* - All		

1 - University of Illinois - Urbana
2 - University of Illinois - Chicago
4 - University of Illinois - Springfield
7 - University of Illinois - Global Campus

Allows users to choose from a list of employee groups

Click Next to continue

< PREV

NEXT >



Selecting Filter Criteria

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

Transactions

MY INBOX GROUP INBOX

PERSONAL PRESET IN USE:

- None -

>>Hide Filter and Preset Chooser<<

Route Stop Role: * E-Group: * College: *

Route Stop Level: * Campus: * Department: *

Transaction Type: * COA: * Organization: *

SELECT A PRESET: PRESET NAME:

- None -

MAKE DEFAULT Add as Preset Save Updated Delete Preset Filter List Reset Filter

TRANS TYPE:	ROUTE STOP ROLE:	ROUTE STOP ACTION:	ROUTE STOP LEVEL:	E-GROUP:	UIN:
* - All	* - All	* - All	* - All	* - All	

CAMPUS:	COA:	COLLEGE:	DEPARTMENT:	UIN:
* - All	* - All	* - All	* - All	
	1 - University of Illinois - Urbana			
	2 - University of Illinois - Chicago			
	4 - University of Illinois - Springfield			
	7 - University of Illinois - Global			

Allows user to enter a UIN

Click Next to continue

< PREV

NEXT >

UNIVERSITY OF ILLINOIS

ADOBE CAPTIVATE™

Selecting Filter Criteria

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

Transactions

MY INBOX GROUP INBOX

PERSONAL PRESET IN USE:

- None -

>>Hide Filter and Preset Chooser<<

Route Stop Role: * E-Group: * College: *

Route Stop Level: * Campus: * Department: *

Transaction Type: * COA: * Organization: *

SELECT A PRESET: PRESET

- None -

TRANS TYPE: ROUTE STOP

* - All * - All

CAMPUS: COA: COLLEGE: DEPARTMENT: ORGANIZATION:

* - All * - All

1 - University of Illinois - Urbana

2 - University of Illinois - Chicago

4 - University of Illinois - Springfield

7 - University of Illinois - Global

GROUP: UIN:

All

Updated Delete Preset Filter List Reset Filter

Click Next to continue

< PREV NEXT >

ADOBE® CAPTIVATE™

Outbox Display Options

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.

Inf/Outboxes

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

☐ 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<<

Refresh List Select

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

Hover your mouse over the outlined Filter and Preset items

Click Next to continue

<< PREV

NEXT >



ADOBE CAPTIVATE™

Outbox Display Options

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.

Inf/Outboxes

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

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

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

PERSONAL PRE: - None -

>>Show Filter and Preset Chooser<<

Refresh List Select

Select Tran ID Stop ID Route Stop Tran Type UIN Last Name First Name Empl Group Home Org Owned By Completed

Hover your mouse over the outlined Filter and Preset items

Click Next to continue

< PREVIOUS

NEXT >



Outbox Display Options

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.

Inf/Outboxes

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

☐ 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 TR
Route Stop Role:
Route Stop Level:
Transaction Type:

Refresh List Select

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
--------	---------	---------	------------	-----------	-----	-----------	------------	------------	----------	----------	-----------

Click Next to continue

< PREV

NEXT >



ADOBE CAPTIVATE™

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.

In/Outboxes

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Transactions

MY INBOX GROUP

PERSONAL PRESET IN USE: - None -

>> Show Filter and Preset Chooser <<

Refresh List Take Ownership Release Ownership Select

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 type="checkbox"/>	59	142	DEPT:Default:Initiate B U-1-ZZ-102-102000 (59:142)	NEWHIRE	*322353235	Deyoung	Janice	B	U-1-102000	Public, John	No
<input type="checkbox"/>	269	696	DEPT:Default:Initiate B U-1-ZZ-101-101000 (269:696)	NEWHIRE	532532532	Junior	Sammydavis	B	U-1-101000	Public, John	No
<input type="checkbox"/>	416	1009	CAMPUS:Default:Initiate B U-9-AB-904-904001 (416:1009)	SEPARATION	232565232	Jones	Patricia	B	U-9-904001	Public, John	No
<input type="checkbox"/>	417	1013	CAMPUS:Default:Apply B *-9-*.*. (417:1013)	SEPARATION	232565231	Smith	Patricia	B	U-9-904001	Public, John	No

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV

NEXT >



Activity: Filtering a List of Transactions

The screenshot shows the 'In/Outboxes' section of the HR Front End. The 'Transactions' tab is active, and the 'MY INBOX' radio button is selected. The 'PERSONAL PRESET IN USE' dropdown is set to '- None -'. The 'CRITERIA FOR LISTED TRANSACTIONS' section includes filters for 'Route Stop Role' (E-Group), 'Route Stop Level' (Campus), and 'Transaction Type' (GG). A red box highlights the 'Filter List' button, with a green callout bubble stating: 'Click on the Filter List button to continue'.

Below the filters, the 'SELECT A PRESET' section shows a dropdown for '- None -' and a 'PRESET NAME' field. The 'TRANS TYPE' is set to '1 - NEWHIRE', 'ROUTE STOP ROLE' is '* - All', 'ROUTE STOP ACTION' is '1 - Initiate', 'ROUTE STOP LEVEL' is '4 - DEPT', and 'E-GROUP' is 'B - Academic Professionals'. The 'CAMPUS' dropdown is set to '* - All', and the 'COLLEGE' dropdown is set to '* - All'. The 'DEPARTMENT' and 'ORGANIZATION' dropdowns are also set to '* - All'.

The 'Route Stop' table is visible, showing columns for 'Select', 'Tran ID', 'Stop ID', and 'Route Stop'. The table contains the following data:

Select	Tran ID	Stop ID	Route Stop
<input type="checkbox"/>	59	142	DEPT:Default:Initiate B U-1-ZZ-102-102000 (59:142)
<input type="checkbox"/>	269	696	DEPT:Default:Initiate B U-1-ZZ-101-101000 (269:696)
<input type="checkbox"/>	416	1009	CAMPUS:Default:Initiate B U-9-AB-904-904001 (416:1009)
<input type="checkbox"/>	417	1013	CAMPUS:Default:Apply B *9-*-* (417:1013)

A yellow callout bubble states: '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: ***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.*

The page includes navigation buttons: '< PREV' and 'NEXT >'. The footer shows the University of Illinois logo and the Adobe Captivate watermark.

Activity: Filtering a List of Transactions

Once the temporary filter has been applied, the transaction list will configure accordingly with the declared criteria.

In/Outboxes

Transactions

MY INBOX GROUP INBOXES MY OUTBOX GROUP OUTBOXES

PERSONAL PRESET IN USE: - None -

CRITERIA FOR LISTED TRANSACTIONS:

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

SELECT A PRESET: - None -

PRESET NAME:

TRANS TYPE: 1 - NEWHIRE

ROUTE STOP ROL: * - All

CAMPUS: * - All

COA: * - All

1 - University
2 - University
4 - University
7 - University

Select the transaction by:

- Double-clicking on the highlighted results, or
- Clicking the highlighted results and then the Select button.

Refresh List Take Ownership Release Ownership **Select**

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
<input type="checkbox"/>	59	142	DEPT:Default:Initiate B U-1-ZZ-102-102000 (59:142)	NEWHIRE	*322353235	Deyoung	Janice	B	U-1-102000	Public, John	No
<input type="checkbox"/>	269	696	DEPT:Default:Initiate B U-1-ZZ-101-101000 (269:696)	NEWHIRE	532532532	Junior	Sammydavis	B	U-1-101000	Public, John	No

UNIVERSITY OF ILLINOIS

< PREV

NEXT >

ADOBE CAPTIVATE

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.

Employee Record View

000123456 1-101000-Control - CBFS Financial Services ECLS: BA Total FTE: 1.000 Base Salary: \$35,000.00 Total Salary:

Full View: Transaction (269-596) NEWHIRE (626) Owner-Yes (public); Not Completed-Editable: BioDemoAccess-JobAccess-[UA0016-00], Stop:
DEPT: Default Initiate B U 1 ZZ 101-101000 (269-596)

DATE: 8/28/2008 View Linked ERV Timeline View

PROPOSED CHANGES

ID	Change Date	Personnel Date	Job	TS Org	Job Change Reason	Change Type
View Wizard 626	08/28/2008	08/28/2008	UA0016-00 SPECIALIST II	1-101000 Control - CBFS Financial Services	HR001, New Hire	NEW

[Add Change](#)

[GENERAL INFO](#) [BIO / DEMO](#) [MEMOS](#) [ATTACHMENTS](#) [AUDIT TRAIL](#)

EMPLOYEE GENERAL INFORMATION

[Route](#) [Return](#) [Save](#) [Cancel](#) [Release Ownership](#) [Send To](#) [Send FYI](#) [Print Friendly View](#)

JOBS **NEWHIRE FORMS** Expand All

UA0016-00: SPECIALIST II ECLS: BA TS ORG: 1-101000 TYPE: P FTE: 1.000 MTHLY: \$2,916.66 BEG: 8/28/2008 STATUS: A

Click Next to
continue

Ch. 3 - Review Page

Transactions

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

PERSONAL PRESET IN USE:
- None -

>>Show Filter and Preset Chooser<<

Refresh List Take Ownership Release

CRITERIA FOR LISTED TRANSACTIONS:

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

Select Tran ID Stop ID

Owned By Completed

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

Click Next to
continue

< PREV

NEXT >



Ch. 4 - Transactions

The screenshot displays the 'Employee Record View' interface. At the top, there is a navigation bar with links for HOME, EMPLOYEE SEARCH, RESULTS, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, the employee record details are shown, including a table with columns for ID, NAME, POSITION, and STATUS. A dropdown menu for 'TRANSACTIONS' is open, showing options like 'Transaction History', 'Initiate New Hire', 'Position Creation Maintenance', and 'Add a Job'. A yellow callout box with the text 'You will learn about:' contains a bulleted list of topics. A green button with the text 'Click Next to continue' is located in the bottom right corner of the interface. The bottom of the screen features a navigation bar with 'PREV' and 'NEXT' buttons, and a status bar with various icons and the text 'ADOBE CAPTIVATE'.

Employee Record View

TRANSACTIONS

Transaction History
Initiate New Hire
Position Creation Maintenance
Add a Job

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

Click Next to continue

PREV NEXT

ADOBE CAPTIVATE

The Transactions option provides users with a list of transaction types which they can perform on an employee.

The screenshot shows the HR Front End interface. At the top, there's a navigation bar with links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS (selected), ADMINISTRATION, HELP, and LOGOUT. Below this is a 'Welcome' message. On the left, there's a sidebar with 'ALERTS & MESSAGES', 'QUICK SEARCH' (with a UIN field and a search button), and 'RESOURCES' (listing Employee Self Service, Human Resources Application, and OBFS - Payroll). The main content area displays a list of transactions. A yellow callout box points to this list, stating: '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:'. Below this text is a bulleted list: 'Initiate New Hire' and 'Position Creation Maintenance'. A green button in the bottom right corner says 'Click Next to continue'. At the very bottom, there are navigation controls: '< PREV', 'NEXT >', and a set of media controls (refresh, play, stop, volume, etc.) with an 'ADOBE CAPTIVATE' logo.

Home Page

TRANSACTIONS

Initiate New Hire

Position Creation Maintenance

Welcome

ALERTS & MESSAGES

QUICK SEARCH

UIN Search

RESOURCES

Employee Self Service

Human Resources Application

OBFS - Payroll

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

< PREV

NEXT >

ADOBE CAPTIVATE

The screenshot displays the 'Employee Record View' interface. At the top, a navigation bar includes links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, a header section shows employee details: 111111111, 9.699008 A/ITS ITPC, ECLS: BA, Total FTE: 1.000, Base Salary: 35,900.00, and Total Salary: 35,900.00. A 'Full View: No Transaction: Readonly: BioDemoAccess: JobAccess: [U22218-00]' link is present. A 'DATE: 9/4/2008' field with a 'View' button is also visible. On the right, 'Linked ERV' and 'Timeline View' buttons are shown. The main content area has tabs for GENERAL INFO, BIO / DEMO, MEMOS, ATTACHMENTS, and AUDIT TRAIL. The 'EMPLOYEE GENERAL INFORMATION' tab is active. A yellow callout box with the text '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.' is overlaid on the 'JOBS' section. The 'JOBS' section shows a job entry 'U22218-00: VST TRAIN' with a 'PRO: X STATUS: A' indicator. A 'Print Friendly View' button is located to the right of the job entry. A green bubble with the text 'Click Next to continue' is positioned at the bottom right. The interface also features a '< PREV' button on the bottom left and a 'NEXT >' button on the bottom right. The Adobe Captivate logo is visible in the bottom right corner.

Employee Record View

111111111 9.699008 A/ITS ITPC ECLS: BA Total FTE: 1.000 Base Salary: 35,900.00 Total Salary: 35,900.00

Full View: No Transaction: Readonly: BioDemoAccess: JobAccess: [U22218-00]

DATE: 9/4/2008 View

Linked ERV Timeline View

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE GENERAL INFORMATION

JOBS

U22218-00: VST TRAIN PRO: X STATUS: A

Print Friendly View

Expand All

Print Friendly View

Click Next to continue

< PREV NEXT >

ADOBE CAPTIVATE™

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.

The screenshot shows the 'TRANSACTIONS' dropdown menu open. A green callout box on the left says 'Hover your mouse over each transaction item for descriptions.' A red box highlights the 'Continue' link next to 'Transaction History'. A green callout box on the right says 'Click here to continue'.

Employee Record View: EPC: ECLS: BA Total FTE: 1.000 Raw
Access Job Access: [022218 00]
DATE: []

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS ALERT TRAIL

EMPLOYEE GENERAL INFORMATION

JOBS

022218-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-599008 TYPE: P FTE: 1.000 MTHLY:

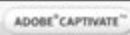
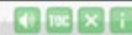
Transaction History Continue
Initiate New Hire
Position Creation Maintenance
Add a Job
Employee Data
Employee Job Record Change
Job End Date
Historical Job Change
Labor Distributions
Reappoint Reactivate Job
Separation

Post Friendly View
Expand All
BGT PROC: X STATUS: A
Post Friendly View

UNIVERSITY OF ILLINOIS

< PREV

NEXT >



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.

The screenshot shows the 'TRANSACTIONS' dropdown menu open. The menu items are: Transaction History, Initiate New Hire, Position Creation Maintenance, Add a Job, Employee Data, Employee Job Record Change, Job End Date, Historical Job Change, Labor Distributions, Reappoint Reactivate Job, and Separation. A red box highlights the 'Continue' button next to 'Transaction History'. A yellow callout box points to the 'Transaction History' menu item with the text: 'Transaction History: This will allow users to view the history of transactions performed on an employee.' A green callout box points to the 'Continue' button with the text: 'Click here to continue'. Another green callout box points to the 'Transaction History' menu item with the text: 'Hover your mouse over each transaction for description'. The background shows the 'Employee Record View' page with fields for 'Full View', 'DATE', and 'EMPLOYEE GENERAL INFORMATION'. The 'JOBS' section shows a job record for 'U22218-09: VST TRAINING SPEC'.

UNIVERSITY OF ILLINOIS

< PREV

NEXT >



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.

The screenshot shows the 'TRANSACTIONS' section of the HR Front End. A dropdown menu is open, listing various transaction types: Transaction History, Initiate New Hire, Position Creation Maintenance, Add a Job, Employee Data, Employee Job Record Change, Job End Date, Historical Job Change, Labor Distributions, Reappoint Reactivate Job, and Separation. A red box highlights the 'Continue' link next to 'Transaction History'. A green callout box points to the 'Continue' link with the text 'Click here to continue'. Another green callout box points to the 'Initiate New Hire' link with the text 'Hover your mouse over each transaction item for description'. A yellow callout box provides a definition for 'Initiate New Hire': 'A transaction that allows users to initiate a new hire transaction to hire an individual. It also allows users to rehire a former employee.'

TRANSACTIONS

- Transaction History [Continue](#)
- Initiate New Hire
- Position Creation Maintenance
- Add a Job
- Employee Data
- Employee Job Record Change
- Job End Date
- Historical Job Change
- Labor Distributions
- Reappoint Reactivate Job
- Separation

Initiate New Hire:
A transaction that allows users to initiate a new hire transaction to hire an individual. It also allows users to rehire a former employee.

UNIVERSITY OF ILLINOIS

< PREV

NEXT >



ADOBE CAPTIVATE™

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.

The screenshot shows the 'TRANSACTIONS' menu on the HR Front End. A red box highlights the 'Continue' link next to 'Transaction History'. A green callout box says 'Click here to continue'. A yellow callout box titled 'Position Creation Maintenance:' explains that it is a transaction for creating or maintaining positions. A green callout box says 'Hover your mouse over each transaction item for descriptions.' The background shows the 'Employee Record View' for employee 022218-00, with tabs for 'GENERAL INFO' and 'JOBS'.

TRANSACTIONS

- [Transaction History](#) **Continue**
- [Initiate New Hire](#)
- [Position Creation Maintenance](#)
- [Add a Job](#)
- [Employee Data](#)
- [Employee Job Record Change](#)
- [Job End Date](#)
- [Historical Job Change](#)
- [Labor Distributions](#)
- [Reappoint Reactivate Job](#)
- [Separation](#)

Position Creation Maintenance:
A transaction that allows users to create or maintain single or pooled positions in the University.

Hover your mouse over each transaction item for descriptions.

Click here to continue

Employee Record View: 022218-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-009008 TYPE: P FTE: 1.000 MTHLY: [Details]

GENERAL INFO | BIO / DEMO

EMPLOYEE GENERAL INFORMATION

JOBS

022218-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-009008 TYPE: P FTE: 1.000 MTHLY: [Details]

Print Friendly View

Expand All

BGT PROC: X STATUS: A

Print Friendly View

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.

The screenshot shows the 'TRANSACTIONS' dropdown menu open. The menu items are: Transaction History, Initiate New Hire, Position Creation Maintenance, Add a Job, Employee Data, Employee Job Record Change, Job End Date, Historical Job Change, Labor Distributions, Reappoint Reactivate Job, and Separation. A red box highlights the 'Continue' link next to 'Transaction History'. A green callout box points to the 'Continue' link with the text 'Click here to continue'. Another green callout box points to the 'Transaction History' item with the text 'Hover your mouse over each transaction item for descriptions.' A yellow callout box points to the 'Add a Job' item with the text 'Add A Job: Allows users to add new jobs to an employee's record.' The background shows the 'Employee Record View' for employee U22218-09, with tabs for GENERAL INFO, BIO / DEMO, and JOBS. The JOBS tab is active, showing details for job U22218-09: VST TRAINING SPEC, ECLS: BA, TS ORG: 9-599008, TYPE: P, FTE: 1.000, MTHLY.

TRANSACTIONS

- Transaction History [Continue](#)
- [Initiate New Hire](#)
- [Position Creation Maintenance](#)
- [Add a Job](#)
- [Employee Data](#)
- [Employee Job Record Change](#)
- [Job End Date](#)
- [Historical Job Change](#)
- [Labor Distributions](#)
- [Reappoint Reactivate Job](#)
- [Separation](#)

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

Hover your mouse over each transaction item for descriptions.

Click here to continue

UNIVERSITY OF ILLINOIS

[PREV](#)[NEXT](#)

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.

The screenshot shows the 'TRANSACTIONS' dropdown menu open. A green callout box points to the menu items with the text: 'Hover your mouse over each transaction item for descriptions.' A red box highlights the 'Continue' link next to 'Transaction History'. Another green callout box points to this link with the text: 'Click here to continue'. A yellow callout box points to the 'Employee Data' item in the menu with the text: 'Employee Data: This transaction allows users to make changes to employee data.' The background shows the 'Employee Record View' for employee U22218-00, with tabs for GENERAL INFO, BIO / DEMO, MEMOS, ATTACHMENTS, and ABOUT THIS.

TRANSACTIONS

- Transaction History **Continue**
- Initiate New Hire
- Position Creation Maintenance
- Add a Job
- Employee Data
- Employee Job Record Change
- Job End Date
- Historical Job Change
- Labor Distributions
- Reappoint Reactivate Job
- Separation

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.

The screenshot shows the 'TRANSACTIONS' dropdown menu open. A green callout box points to the menu items with the text: 'Hover your mouse over each transaction item for descriptions.' A red box highlights the 'Continue' link next to 'Transaction History'. Another green callout box points to this link with the text: 'Click here to continue'. A yellow callout box points to the 'Employee Job Record Change' item in the menu with the text: 'Employee Job Record Change: This transaction allows users to make changes to an employee's job record.' The background shows the 'Employee Record View' page with various tabs and a list of jobs.

TRANSACTIONS

- Transaction History [Continue](#)
- Initiate New Hire
- Position Creation Maintenance
- Add a Job
- Employee Data
- Employee Job Record Change
- Job End Date
- Historical Job Change
- Labor Distributions
- Reappoint Reactivate Job
- Separation

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

UNIVERSITY OF ILLINOIS

< PREV

NEXT >



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.

The screenshot shows the 'TRANSACTIONS' dropdown menu on the HR Front End. The menu items are: Transaction History, Initiate New Hire, Position Creation Maintenance, Add a Job, Employee Data, Employee Job Record Change, Job End Date, Historical Job Change, Labor Distributions, Reappoint/Reactivate Job, and Separation. A red box highlights the 'Continue' link next to 'Transaction History'. A green callout box points to the 'Continue' link with the text 'Click here to continue'. Another green callout box points to the 'Transaction History' menu item with the text 'Hover your mouse over each transaction item for descriptions.' A yellow callout box points to the 'Job End Date' menu item with the text 'Job End Date: This transaction allows users to add, change, or remove a job end date to a job record.' The background shows the 'Employee General Information' page for employee U22218-09.

Hover your mouse over each transaction item for descriptions.

Click here to continue

Job End Date:
This transaction allows users to add, change, or remove a job end date to a job record.

UNIVERSITY OF ILLINOIS

< PREV

NEXT >



ADOBE CAPTIVATE™

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.

The screenshot shows the 'TRANSACTIONS' menu on the HR Front End. The menu items are: Transaction History, Initiate New Hire, Position Creation Maintenance, Add a Job, Employee Data, Employee Job Record Change, Job End Date, Historical Job Change, Labor Distributions, Reappoint Reactivate Job, and Separation. A red box highlights the 'Continue' link next to 'Transaction History'. A green callout box points to the 'Continue' link with the text 'Click here to continue'. Another green callout box points to the 'Transaction History' menu item with the text 'Hover your mouse over each transaction item for descriptions.' A yellow callout box points to the 'Historical Job Change' menu item with the text 'Historical Job Change: This transaction allows users to make changes to an employee's job personnel date after a payout has been applied.' The background shows the 'Employee Record View' page with various tabs and fields.

Hover your mouse over each transaction item for descriptions.

Click here to continue

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

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.

The screenshot shows the 'TRANSACTIONS' dropdown menu open. The menu items are: Transaction History, Initiate New Hire, Position Creation Maintenance, Add a Job, Employee Data, Employee Job Record Change, Job End Date, Historical Job Change, Labor Distributions, Reappoint Reactivate Job, and Separation. A red box highlights the 'Continue' button next to 'Transaction History'. A green callout box points to the 'Continue' button with the text 'Click here to continue'. Another green callout box points to the 'Transaction History' menu item with the text 'Hover your mouse over each transaction item for descriptions.' A yellow callout box points to the 'Labor Distributions' menu item with the text 'Labor Distribution: This transaction allows users to make changes to an employee's labor distribution or add an additional labor distribution.'

Hover your mouse over each transaction item for descriptions.

Click here to continue

Labor Distribution:
This transaction allows users to make changes to an employee's labor distribution or add an additional labor distribution.

UNIVERSITY OF ILLINOIS

< PREV

NEXT >



ADOBE CAPTIVATE™

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.

The screenshot shows the 'TRANSACTIONS' dropdown menu open. A red box highlights the 'Continue' link next to 'Transaction History'. A green callout box points to the 'Continue' link with the text 'Click here to continue'. Another green callout box points to the 'Transaction History' link with the text 'Hover your mouse over each transaction item for descriptions.' A yellow callout box titled 'Reappoint/Reactivate Job:' provides a definition: 'This transaction allows users to reappoint an employee's job or reactivate a job that has ended.' The background shows the 'Employee Record View' for employee U22218-00.

Hover your mouse over each transaction item for descriptions.

Click here to continue

Reappoint/Reactivate Job:
This transaction allows users to reappoint an employee's job or reactivate a job that has ended.

UNIVERSITY OF ILLINOIS

< PREV

NEXT >



ADOBE CAPTIVATE™

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.

The screenshot shows the 'TRANSACTIONS' dropdown menu open on the 'Employee Record View' page. The menu lists various transaction types: Transaction History, Initiate New Hire, Position Creation Maintenance, Add a Job, Employee Data, Employee Job Record Change, Job End Date, Historical Job Change, Labor Distributions, Reappoint Reactivate Job, and Separation. A red box highlights the 'Continue' link next to 'Transaction History'. A green callout box points to the 'Transaction History' menu item with the text: 'Hover your mouse over each transaction item for descriptions.' Another green callout box points to the 'Continue' link with the text: 'Click here to continue'. A yellow callout box at the bottom left of the menu area contains the text: 'Separation: This transaction allows users to separate an employee from the University.'

Employee Record View

TRANSACTIONS

- Transaction History [Continue](#)
- Initiate New Hire
- Position Creation Maintenance
- Add a Job
- Employee Data
- Employee Job Record Change
- Job End Date
- Historical Job Change
- Labor Distributions
- Reappoint Reactivate Job
- Separation

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

UNIVERSITY OF ILLINOIS

[PREV](#)[NEXT](#)

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

Click Next to continue

Transaction History

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

Transaction History

View DRV Back

History of HR Front End Transactions for: UIN: 33333333

Transaction History	Effective Date	Trans Id
2008-09-02 09:43:10.0	579	
2008-09-02 09:43:10.0	1369	
2008-09-02 09:43:10.0	579	1370

Component History - Trans ID: 579

Component History	Effective Date	Trans Id	Component Id
2008-09-02 09:43:10.0	579	1370	

Audit Trail - Trans ID: 579 - Component ID: 1369

Transaction	Effective Date	Trans Id	Component Id	Changes/Notes
APPLIED: JOBCCHANGE (1370)	2008-09-02 09:43:03.0			Successfully applied JobAssignment.
APPLIED: JOBCCHANGE (1369)	2008-09-02 09:42:32.0			Successfully applied JobAssignment.
DATA CHANGE: JOBCCHANGE (1370)	2008-09-02 09:41:20.0			Changed 'HOURLY' from ' ' to '22.176117'
DATA CHANGE: JOBCCHANGE (1370)	2008-09-02 09:41:20.0			Changed 'ANNUAL' from ' ' to '946,125.00'
DATA CHANGE: JOBCCHANGE (1370)	2008-09-02 09:41:20.0			Changed 'FutureDateComponent' from ' ' to 'true'
DATA CHANGE: JOBCCHANGE (1370)	2008-09-02 09:41:20.0			Changed 'FutureDateComponent' from ' ' to 'true'
DATA CHANGE: JOBCCHANGE (1370)	2008-09-02 09:41:20.0			Changed 'FutureDateComponent' from ' ' to 'true'
DATA CHANGE: JOBCCHANGE (1369)	2008-09-02 09:41:20.0			Changed 'FutureDateComponent' from ' ' to 'true'
CREATE TRANSACTION (579)	2008-09-02 09:41:20.0			Created Transaction
DATA CHANGE: JOBCCHANGE (1369)	2008-09-02 09:41:06.0			Changed 'PERSONNEL DATE' from '9/18/2008' to '9/2/2008'
DATA CHANGE: JOBCCHANGE (1369)	2008-09-02 09:41:03.0			Changed 'CHG REASON' from '1' to 'FT001'
DATA CHANGE: JOBCCHANGE (1369)	2008-09-02 09:39:36.0			Changed 'ANNUAL' from '\$30,903.75' to '946,125.00'

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

Click Next to continue

< PREV

NEXT >

Transaction History

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

Transaction History

View Entry Back

History of HR Front End Transactions for: UIN: 55555555

SELECT	COMPLETED DATE	COMPONENT TYPE	DATE	USER	TRANSACTION	EFFECTIVE DATE	TRANS ID
Select	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Public, John	Applied to Banner	11-9-699008	579

Component History - Trans ID: 579

SELECT	COMPLETED DATE	COMPONENT TYPE	DATE	USER	TRANSACTION	EFFECTIVE DATE	TRANS ID	COMPONENT ID
Select	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Public, John	Applied to Banner	11-9-699008	579	1369
Select	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Public, John	Applied to Banner	11-9-699008	579	1370

Audit Trail - Trans ID: 579 - Component: 1369

TRANSACTION	DATE	USER	DESCRIPTION
APPLIED: JOBCHANGE (1370)	2008-09-02 09:43:03.0	Public, John	Successfully applied JobAssignment.
APPLIED: JOBCHANGE (1369)	2008-09-02 09:42:32.0	Public, John	Successfully applied JobAssignment.
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:20.0	Public, John	Changed HOURLY from " " to "22.176117"
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:20.0	Public, John	Changed ANNUAL from " " to "\$46,125.00"
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:20.0	Public, John	Changed FutureCaledComponent from " " to "true"
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:20.0	Public, John	Changed FutureCaledComponent from " " to "true"
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:20.0	Public, John	Changed FutureCaledComponent from " " to "true"
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:41:06.0	Public, John	Changed PERSONNEL DATE from 9/18/2008 to 9/2/2008
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:41:03.0	Public, John	Changed CHG REASON from 0 to FT001
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:39:36.0	Public, John	Changed ANNUAL from \$30,903.75 to \$46,125.00

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

Click Next to continue

PREV NEXT

ADOBE CAPTIVATE

Transaction History

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

Transaction History

View ERV Back

History of HR Front End Transactions for: IDIN: 1111111111

PERSONAL	Transaction Date	Transaction Type	Transaction Date	Status	Home Org	Effective Date	Trans Id
Select	2008-09-02 09:43:10.0	ERC	2008-09-02 09:41:07.0	Applied to Banner	9-699008		579

Component History - Trans ID: 579

PERSONAL	Component Date	Component Type	Transaction Date	Status	Home Org	Effective Date	Trans Id	Component Id
Select	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
Select	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2009-05-30 00:00:00.0	579	1370

Audit Trail - Trans ID: 579 - Component ID: 1369

PERSONAL	Transaction Date	Transaction Type	Transaction Date	Status	Home Org	Effective Date	Trans Id	Component Id
APPLIED: JOBCHANGE (1370)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
APPLIED: JOBCHANGE (1369)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2009-05-30 00:00:00.0	579	1370
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2009-05-30 00:00:00.0	579	1370
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2009-05-30 00:00:00.0	579	1370
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
CREATE TRANSACTION (579)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2009-05-30 00:00:00.0	579	1370
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2009-05-30 00:00:00.0	579	1370
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
DATA CHANGE: JOBCHANGE (1369)	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2009-05-30 00:00:00.0	579	1370

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

< PREV

NEXT >



ADOBE CAPTIVATE™

Transaction History

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

Transaction History

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Click the Select button to view the Component History of the transaction.

Select	Completed Date	Trans type	Initiated Date	Status	Home Org	Effective Date	Trans Id
Select	2008-09-02 09:43:10.0	ERC	2008-09-02 09:41:07.0	Applied to Banner	U-9-699008		579

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE® CAPTIVATE™

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.

Transaction History

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

View ERV Back

History of HR Front End Transactions for: 111111111

Transaction History

Select	Completed Date	Tran Type	Initiated Date	Status	Home Org	Effective Date	Trans Id
Select	2008-09-02 09:43:10.0	ERC	2008-09-02 09:41:07.0	Applied to Banner	U-9-699008		579

Component History - Trans ID: 579

Select	Completed Date	Component Type	Initiated Date	Status	Home Org	Effective Date	Trans Id	Component Id
Select	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369
Select	2008-09-02 09:43:10.0	JOBCHANGE	2008-09-02 09:41:07.0	Applied to Banner	9-699008	2009-05-30 00:00:00.0	579	1370

Click the Select button to view the Audit Trail.

UNIVERSITY OF ILLINOIS
SCHOOL OF BUSINESS • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBES CAPTIVATE™

Transaction History

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

View ERV Back

Let's view the Employee Record View for this Transaction. Click the View ERV button.

Initiated Date	Status	Home Org	Effective Date	Trans Id
2008-09-02 09:41:07.0	Applied to Banner	U-9-699008		579

Initiated Date	Status	Home Org	Effective Date	Trans Id	Component Id
2008-09-02 09:41:07.0	Applied to Banner	9-699008	2008-09-02 00:00:00.0	579	1369

Audit Trail - Trans ID: 579 - Component ID: 1369

Action	Action Timestamp	Stop	Owner	Changes/Notes
RELEASE OWNERSHIP	2008-09-02 09:43:10.0	CAMPUS:Default:Apply B U-9-*.*. (579:1369)		
APPLIED: JOBCHANGE (1370)	2008-09-02 09:43:03.0		Public, John	Successfully applied JobAssignment.
APPLIED: JOBCHANGE (1369)	2008-09-02 09:42:00.0			and JobAssignment.
TAKE OWNERSHIP	2008-09-02 09:42:00.0			
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:00.0			from " to '22.176117'
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:00.0			from " to '\$46,125.00'
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:00.0			atedComponent' from " to 'true'
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:00.0			from " to '1.0'
DATA CHANGE: JOBCHANGE (1370)	2008-09-02 09:41:20.0		Public, John	Changed 'MONTHLY' from " to '\$3,843.75'
ROUTED	2008-09-02 09:41:20.0	CAMPUS:Default:Apply B U-9-*.*. (579:1369)		

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.

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™

Historical Employee Record View

111

Historical Employee Step: CAMPUS Data

DATE: 5/30/2009

Since the data for this transaction has already been applied to Banner, the Historical Employee Record View is displayed.

ID	Change Date	Effective Date	WFO	TS Org	Job Change Reason	Change Type
1369	09/02/2008	09/02/2008	U22218-00 VST TRAINING SPEC	9-699008 AITS ITPC	FT001, FTE Change	ERC
1370	05/30/2009	05/30/2009	U22218-00 VST TRAINING SPEC	9-699008 AITS ITPC	EJ001, End Job	ERC

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE GENERAL INFORMATION

JOBS

U22218-00: VST TRAINING SPEC ECLS: BA TS C

007 END: 5/30/2009 BGT PRD: X STATUS: T

Expand All

Print Friendly View

Click Next to continue

UN

IS

PREV

NEXT

ADOBE CAPTIVATE

Ch. 4 - Review Page

Employee Record View

111111111 9439088, AITS (TPC - ECLS: BA - Total FTE: 1.000 - Base Sal: 35,500.00

Full View: No Transaction Ready to Sign: No Access: Job Access: 022218-00

DATE: 04/2008 View

Transaction History
Initiate New Hire
Position Creation Maintenance
Add a Job

GENERAL INFO BIO / DEMO MEMBERS ATTACHMENTS AUDIT TRAIL

EMPLOYEE GENERAL INFO

JOBS

022218-00: VST TRAINING

Print Friendly View

Expand All

PRO: X STATUS: A

Print Friendly View

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

UNIVERSITY OF ILLINOIS

< PREV

NEXT >



ADOBE CAPTIVATE™

Ch. 5 - Admin Tools

The screenshot shows the HR Front End interface. At the top is a navigation bar with links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this is a 'Home Page' section with a 'Welcome' message and a 'User Preferences' link. The main content area is divided into sections: 'ALERTS & MESSAGES', 'QUICK SEARCH' (with a UIN input field and a Search button), and 'RESOURCES' (with links to Employee Self Service, Human Resources Applications, and OBFS - Payroll). A yellow callout box is overlaid on the center of the screen, containing the text 'You will learn about:' followed by two bullet points: '• The interface of the Admin Tools in the HR Front End' and '• How to use the different tools that you will encounter in the Admin Tools feature'. In the bottom right corner, there is a green button with the text 'Click Next to continue'. The bottom of the screen features a navigation bar with '< PREV' and 'NEXT >' buttons, and a footer with a progress bar, a volume icon, a 'TUC' icon, a close icon, an information icon, and the text 'ADOBE® CAPTIVATE™'.

Home Page

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Welcome

User Preferences

ALERTS & MESSAGES

QUICK SEARCH

UIN Search

RESOURCES

[Employee Self Service](#)
[Human Resources Applications](#)
[OBFS - Payroll](#)

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

< PREV NEXT >

ADOBE® CAPTIVATE™

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

The screenshot displays the HR Front End interface. At the top, a navigation bar includes links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, and a user profile icon. Below this, a 'Welcome' message is shown. A sidebar on the left contains sections for 'ALERTS & MESSAGES', 'QUICK SEARCH' (with a UIN field and a Search button), and 'RESOURCES' (listing Employee Self Service, Human Resources Applications, and OBFS - Payroll). The main content area features a menu with 'User Preferences' and 'User Security' links. A red box highlights the 'User Preferences' link, with a green callout bubble stating 'Click the User Preferences link to continue'. A yellow callout bubble explains that the menu is generated based on user security permissions and lists the visible items: 'User Preferences and' and 'User Security'. It also notes that administrators will see additional items. The footer includes a 'UNIVERSITY OF ILLINOIS' logo and navigation buttons for '< PREV' and 'NEXT >'. The bottom of the screen shows a video player interface with controls and an 'ADOBE CAPTIVATE' logo.

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*

UNIVERSITY OF ILLINOIS
Urbana • Champaign • Carbondale • Springfield

< PREV NEXT >

ADOBE CAPTIVATE™

User Preferences allows users to customize certain features of the HR Front End application.

User Preferences

EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

- Select One

- Select One

Emp Search Columns

Employee Search

In/Outbox Columns

Click the Employee Search Columns dropdown choice to continue.

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

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

UNIVERSITY OF ILLINOIS
Urbana-Champaign • Champaign • Springfield

< PREV

NEXT >



ADOBE® CAPTIVATE™

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.

User Preferences

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

Emp Search Columns

AVAILABLE COLUMNS

Middle
User ID
Last 4 S
Trans

SELECTED COLUMNS

UIN
Last Name

Under Available Columns, click on the outlined Middle criteria.

UIN	Last Name	First Name	E-Class	Emp Status	Home ORG
123456789	Doe	John	EC - EClass	A	U-9-904001 - AWP Human Resources/Shared

Save Cancel Restore Defaults

UNIVERSITY OF ILLINOIS
Urbana-Champaign • Chicago • Springfield

< PREV NEXT >

ADOBE CAPTIVATE™

User Preferences

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Pref

Emp Sear

Notice how the choice that was selected is now highlighted in blue.

AVAILABLE COLUMNS

Middle
User ID
Last 4 SSN
Trans

SELECTED COLUMNS

UIIN
Last Name
First Name
E-Class

In order to move the item from Available Columns to Selected Columns, click the outlined arrow.

UIIN	Last Name	First Name	E-Class	Home ORG
123456789	Doe	John	EC - EClass	A
U-9-904001 - AYP Human Resources/Shared				

Save Cancel Restore Defaults

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™

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.

User Preferences

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

Emp Search Columns

AVAILABLE COLUMNS

- User ID
- Last 4 SSN
- Trans

SELECTED COLUMNS

- UIN
- Last Name
- First Name
- E-Class
- Emp Status
- Home_ORG
- Middle

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

UIN	Last Name	First Name	E-Class	Emp Status	Home_ORG	Middle
123456789	Doe	John	EC - EClass	A	U-9-904001 - AWP Human Resources/Shared	S

Save Cancel Restore Defaults

Click Save to continue

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™

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

User Preferences

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

- Select One -

- Select One -

Emp Search Columns

Employee Search

In/Outbox Columns

Click the Employee Search drop-down choice to continue.

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™

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.

Label	Description
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.
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.
DEPARTMENT	This drop down control contains all the departments in the selected COA above. Select the department that you want to set as your default search criteria. The selected department will filter the Organization drop down.
ORGANIZATION	This drop down control contains all the organizations in the selected COA above. Select the organization that you want to set as your default search criteria. The selected organization will filter the Employee Group drop down.
EMPLOYEE GROUP	This drop down control contains all the employee groups in the selected COA above. Select the employee group that you want to set as your default search criteria. The selected employee group will filter the Display Terminated drop down.
DISPLAY TERMINATED	Select the display criteria for terminated employees. Always, Never, or Only.
MAX ROWS	Max rows that can be returned.
CAMPUS	This drop down control contains all the campuses. Select the campus that you want to set as your default search criteria.
DEFAULT VIEW	ERV or Timeline after employee search.

Save Cancel

UNIV

Click Next to continue

< PREV

NEXT >

ADOBE CAPTIVATE™

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

Save Cancel

UNIVERSITY OF ILLINOIS - SPRINGFIELD

< PREV

NEXT >

ADOBE CAPTIVATE™

Label	Description
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.
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.
DEPARTMENT	This drop down control contains all the departments in the selected COA above. Select the department that you want to set as your default search criteria. The selected department will filter the Organization drop down.
ORGANIZATION	This drop down control contains all the organizations in the selected COA above. Select the organization that you want to set as your default search criteria. The selected organization will filter the Employee Group drop down.
EMPLOYEE GROUP	This drop down control contains all the employee groups in the selected COA above. Select the employee group that you want to set as your default search criteria. The selected employee group will filter the Display Terminated drop down.
DISPLAY TERMINATED	Select display terminated employees. Always
MAX ROWS	Max rows that can be returned.
CAMPUS	This drop down control contains all the campuses. Select the campus that you want to set as your default search criteria.
DEFAULT VIEW	ERV or Timeline after employee search.

* - All
1 - University of Illinois - Urbana
2 - University of Illinois - Chicago
4 - University of Illinois - Springfield
7 - University of Illinois - Global
9 - University of Illinois - Admin

* - A

* - A

* - All

250

* - All

ERV

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

Save Cancel

UNIVERSITY OF CALIFORNIA

< PREV

NEXT >

ADOBE CAPTIVATE

Label	Description
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.
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.
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.
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. The selected organization will filter the Employee Group drop down.
EMPLOYEE GROUP	This drop down control contains all the employee groups in the selected organization above. Select the employee group that you want to set as your default search criteria. The selected employee group will filter the Display Terminated drop down.
DISPLAY TERMINATED	Select display terminated employees.
MAX ROWS	Max rows that can be returned.
CAMPUS	This drop down control contains all the campuses. Select the campus that you want to set as your default search criteria.
DEFAULT VIEW	ERV or Timeline after employee search.

* - All

AA - Executive Offices
AB - Ofc Planning & Administration
AD - University Audits
AF - Business & Financial Services
AH - VP for Academic Affairs
AJ - VP Technology & Economic Dev
AL - Capital Prgms/Real Estate Svcs
AM - UIF and Alumni Association
AN - University Ethics Office
AP - VP Chief Financial Officer
AX - University Wide Units
AY - UA - Utilities Administration
AZ - UA General Use
ZZ - Control - Organizations

250

* - All

ERV

User Preferences

HOME

User Preferences

Employee Search

Label	Description
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.
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.
DEPARTMENT	This drop down control contains all the departments in the selected COA above. Select the department that you want to set as your default search criteria. The selected department will filter the Organization drop down.
ORGANIZATION	This drop down control contains all the organizations in the selected COA above. Select the organization that you want to set as your default search criteria. The selected organization will filter the Employee Group drop down.
EMPLOYEE GROUP	This drop down control contains all the employee groups in the selected COA above. Select the employee group that you want to set as your default search criteria. The selected employee group will filter the search results.
DISPLAY TERMINATED	Select whether to display terminated employees. Always
MAX ROWS	Max rows that can be returned.
CAMPUS	This drop down control contains all the campuses. Select the campus that you want to set as your default search criteria.
DEFAULT VIEW	ERV or Timeline after employee search.

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

* - All

* - A

* - All

375 - Illinois Connection

391 - Secretarys Office Board of Trustees

550 - University Counsel

615 - Presidents Office

693 - Ofc of Governmental Relations

868 - Ofc for University Relations

* - All

250

* - All

ERV

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.

Save Cancel

UNIV

Click Next to continue

< PREV

NEXT >

⏮ ⏪ ⏩ ⏭

🔊 🔇 🔍 ⓘ

ADOBE CAPTIVATE™

User Preferences

Employee Search

Label	Description
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.
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.
DEPARTMENT	This drop down control contains all the departments in the selected COA above. Select the department that you want to set as your default search criteria. The selected department will filter the Organization drop down.
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. The selected organization will filter the Employee Group drop down.
EMPLOYEE GROUP	This drop down control contains all the employee groups in the selected organization above. Select the employee group that you want to set as your default search criteria. The selected employee group will filter the search results.
DISPLAY TERMINATED	Select whether to display terminated employees. Always
MAX ROWS	Max rows that can be returned.
CAMPUS	This drop down control contains all the campuses. Select the campus that you want to set as your default search criteria.
DEFAULT VIEW	ERV or Timeline after employee search.

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

* - All

* - A

* - A

* - All
375000 - Illinois Connection

* - All

250

* - All

ERV

Save Cancel

UNIVERSITY OF ILLINOIS

Click Next to continue

< PREV

NEXT >

ADOBE CAPTIVATE™

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

Label	Description
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.
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.
DEPARTMENT	This drop down control contains all the departments in the selected COA above. Select the department that you want to set as your default search criteria. The selected department will filter the Employee Group drop down.
ORGANIZATION	This drop down control contains all the organizations in the selected COA above. Select the organization that you want to set as your default search criteria. The selected organization will filter the Employee Group drop down.
EMPLOYEE GROUP	This drop down control contains all the employee groups in the selected COA above. Select the employee group that you want to set as your default search criteria. The selected employee group will filter the Employee Search results.
DISPLAY TERMINATED	Select whether to display terminated employees. Always
MAX ROWS	Max rows that can be returned.
CAMPUS	This drop down control contains all the campuses. Select the campus that you want to set as your default search criteria.
DEFAULT VIEW	ERV or Timeline after employee search.

- * - All
- A - Faculty and Other Academics
- B - Academic Professionals
- C - Civil Service Web/Dpt Trn Entry
- D - Civil Service Time Rpt Feeder
- E - Civil Service Extra Help
- G - Grads and Predoc Fellows
- H - Academic Hourly & Grad Hourly
- L - Lump Sum
- M - Summer
- P - Postdoc Fellow/ResAssoc/Intrn
- R - Residents
- S - Student
- T - Retiree/Annuitant
- U - Unpaid
- V - Virtual
- W - One-time

User Preferences

HOME

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

Label	Description
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.
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.
DEPARTMENT	This drop down control contains all the departments in the selected COA above. Select the department that you want to set as your default search criteria. The selected department will filter the Organization drop down.
ORGANIZATION	This drop down control contains all the organizations in the selected COA above. Select the organization that you want to set as your default search criteria. The selected organization will filter the Employee Group drop down.
EMPLOYEE GROUP	This drop down control contains all the employee groups in the selected COA above. Select the employee group that you want to set as your default search criteria. The selected employee group will filter the search results.
DISPLAY TERMINATED	Select whether to display terminated employees. Always
MAX ROWS	Max rows that can be returned.
CAMPUS	This drop down control contains all the campuses. Select the campus that you want to set as your default search criteria.
DEFAULT VIEW	ERV or Timeline after employee search.

*- All

*- A

*- A

*- A

*- All

250

*- All
 C - UIC Chicago
 G - UIC Global
 S - UIS Springfield
 U - UIUC Urbana / Champaign

Save Cancel

UNIVERSITY OF ILLINOIS

Click Next to continue

< PREV

NEXT >

⏮ ⏪ ⏩ ⏭

🔊 🔍 ⓘ

ADOBE® CAPTIVATE™

99

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.

2 - University of Illinois - Chicago

FP - Education

208 - Education

208000 - Education

B - Academic Professionals

250

C - UIC Chicago

ERV

Save Cancel Restore Defaults

UNIVERSITY OF ILLINOIS
Urbana-Champaign • Chicago • Springfield

< PREV NEXT >

ADOBE CAPTIVATE™

The screenshot displays the HR Front End Admin Tools interface. At the top, a navigation bar includes links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS (highlighted), HELP, and LOGOUT. Below this, the Employee Search form is visible, featuring fields for UIN, LAST NAME, FIRST NAME, COA (set to 2 - University of Illinois - Chicago), COLLEGE (set to FP - Education), DEPARTMENT (set to 208 - Education), ORGANIZATION (set to 208000 - Education), CAMPUS (set to C - UIC Chicago), and EMPLOYEE GROUP (set to B - Academic Professionals). A checkbox for INCLUDE TERMINATED EMPLOYEES is present, along with Search and Reset buttons. A green callout box with red text states: "Let's return to User Preferences. Click the User Preferences link." This callout points to the Admin Tools menu, which is open, showing links for User Preferences (highlighted with a red box) and User Security. Below the form, a text box reads: "After the changes have been made, those settings are now the default settings for the Employee Search feature." The footer includes the University of Illinois logo and navigation buttons for PREV and NEXT. The bottom of the screen shows a standard presentation control bar with navigation icons and the Adobe Captivate logo.

Employee Search

UIN: LAST NAME: FIRST NAME:

COA: 2 - University of Illinois - Chicago COLLEGE: FP - Education

DEPARTMENT: 208 - Education ORGANIZATION: 208000 - Education

CAMPUS: C - UIC Chicago EMPLOYEE GROUP: B - Academic Professionals

☐ INCLUDE TERMINATED EMPLOYEES

Search Reset

Let's return to User Preferences. Click the User Preferences link.

User Preferences

User Security

After the changes have been made, those settings are now the default settings for the Employee Search feature.

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™

Now that we have customized the Employee Search feature, let's customize the In/Outbox column settings.

User Preferences



EMPLOYEE SEARCH



IN/OUTBOXES



TRANSACTIONS ▾



ADMIN TOOLS ▾



HELP



LOGOUT

User Preferences

- Select One - ▾
- Select One -
- Emp Search Columns
- Employee Search
- In/Outbox Columns

Click the In/Outbox Columns link to continue.

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV

NEXT >



ADOBE® CAPTIVATE™

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

User Preferences

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

In/Outbox Columns

AVAILABLE COLUMNS

- Middle Name
- Ownership Date
- Routed By
- FYI
- Send To
- Tran Enabled Date
- Name Suffix
- Initiated By
- Initiated DateTime
- Received DateTime

SELECTED COLUMNS

Select

Tran ID

Home Org

Under Available Columns, click on the outlined Middle Name criteria.

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
<input type="checkbox"/>	1	3	CAMPUS:Default:Apply C U-1-*-* (1:3)	EMPDATA	123456789	Doe	Jane	B	U-9-615000	1111111111	No

Save Cancel Restore Defaults

UNIVERSITY OF ILLINOIS
Urbana-Champaign • Champaign • Springfield

< PREV NEXT >

ADOBE CAPTIVATE™

Notice that the selection that was made in the Available Columns is now highlighted.

User Preferences

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

In/Outbox Columns

AVAILABLE COLUMNS

- Middle Name
- Ownership DateTime
- Routed By
- FYI
- Send To
- Tran Enabled Date
- Name Suffix
- Initiated By
- Initiated DateTime
- Received DateTime

SELECTED COLUMNS

- Select
- Tran ID
- Stop ID
- Route Stop

To move the item from Available Columns to Selected Columns, click the outlined arrow.

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Last Name	First Name	Empl Group	Home Org	Owned By	Completed
<input type="checkbox"/>	1	3	CAMPUS:Default:Apply C U-1-*.**.* (1:3)	EMPDATA	123456789	Doe	Jane	8	U-9-615000	1111111111	No

Save Cancel Restore Defaults

UNIVERSITY OF ILLINOIS
CHICAGO • CHAMPAIGN • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVITE™

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.

User Preferences

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

User Preferences

In/Outbox Columns

AVAILABLE COLUMNS

- Ownership DateTime
- Routed By
- FYI
- Send To
- Tran Enabled Date
- Name Suffix
- Initiated By
- Initiated DateTime
- Received DateTime

SELECTED COLUMNS

- Select
- Tran ID
- Stop ID
- Route Stop
- Tran Type
- UIN
- Middle Name
- Last Name
- First Name
- Empl Group

Click the Save button to continue

Select	Tran ID	Stop ID	Route Stop	Tran Type	UIN	Middle Name	Last Name	First Name	Empl Group	Completed
<input type="checkbox"/>	1	3	CAMPUS:Default:Apply C U-1-*.** (1:3)	EMPDATA	123456789	Z	Doe	Jane	B	

Save Cancel Restore Defaults

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™

The next feature of Admin Tools that we will visit is User Security.

The screenshot displays the HR Front End Admin Tools interface. At the top, a navigation bar includes links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS (selected), HELP, and LOGOUT. Below this, a 'Welcome' message is followed by an 'ALERTS & MESSAGES' section. A 'QUICK SEARCH' section contains a 'UIN' input field and a 'Search' button. The 'RESOURCES' section lists links for Employee Self Service, Human Resources Applications, and OBFS - Payroll. A red box highlights the 'User Security' link in the ADMIN TOOLS dropdown menu, with a green callout bubble stating 'Click the User Security link to continue'. The footer of the interface includes a 'UNIVERSITY OF ILLINOIS' logo and a navigation bar with '< PREV' and 'NEXT >' buttons. The bottom of the screen shows a video player interface with playback controls and an 'ADOBE CAPTIVATE' logo.

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.

User Security																																								
<input type="checkbox"/> SHOW EXPIRED																																								
APPLICATION USER			ACTIONS/ROUTES STOPS		ORG CODES				EMPLOYEE GROUPS																TRANSACTIONS				MASK	DATES										
UIN	Name	Enterprise ID	Role	Action	Campus	COA	Coll	Dept	Org	A	B	C	D	E	G	H	I	M	P	R	S	T	U	ALL	NEW	ERC	LD	HJC	REA	ADD	SEP	EMP	PCM	WKS	ALL	SSN	From	Thru		
1111111111	Smith, Joe	smh2	Default	Review	*	1	NB	593	*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6/27/2008	8/15/2008

The following may appear under the Actions column:

Action

Initiate

Review

Apply

- 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

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

Ch. 5 - Review Page

The screenshot shows the HR Front End interface. At the top, there is a navigation bar with links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, there is a 'Welcome' section and a 'User Preferences' link. The main content area is divided into sections: ALERTS & MESSAGES, QUICK SEARCH (with a UIN field and a Search button), and RESOURCES (listing Employee Self Service, Human Resources Application, and OBFS - Payroll). A yellow callout box is overlaid on the center of the screen, containing the following text:

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

At the bottom right, there is a green button that says 'Click Next to continue'. The bottom of the screen features a navigation bar with '< PREV' and 'NEXT >' buttons, and a footer with a progress bar and 'ADOBE CAPTIVATE' logo.

Ch. 6 - Online Help

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 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 servicedesk@uillinois.edu

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

[HRFE Front End](#)

[New Hire](#)

[Add a](#)

[Employee](#)

[Labor](#)

[Employee](#)

[Job En](#)

[Reapp](#)

[Separ](#)

[Employee Group/Class 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 Application](#)

[Overview](#)

[HRFE Training](#)

[Help & Support](#)

[Knowledgebase](#)

You will learn about:

- The HR Front End Online Help Page

Click Next to
continue

< PREV

NEXT >



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.

The screenshot displays the HR Front End interface. At the top, a navigation menu includes links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, and HELP. The HELP link is highlighted with a red box. A green callout box with red text points to the HELP link, stating: "Click the Help link to access the Online Help feature." Below the navigation menu, the main content area shows a "Welcome" message, "ALERTS & MESSAGES", a "QUICK SEARCH" section with a "UIN" field and a "Search" button, and a "RESOURCES" section with links to "Employee Self Service", "Human Resources Applications", and "OBFS - Payroll". The footer of the interface includes the University of Illinois logo and the text "UNIVERSITY OF ILLINOIS" and "ADOBE CAPTIVATE".

Home Page **HR Front End Training** **TOOLS** **HELP** **LOGOUT**

Welcome

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 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 serviceskiffs@uillinois.edu

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.

Additional resources

- [HR Front End Application](#)
- [Overview](#)
- [HRFE Training](#)
- [Help & Support](#)
- [Knowledgebase](#)
- [Metrics & Release Content](#)
- [Steering Team](#)

RESOURCES

- [Employee S](#)
- [Human Res](#)
- [OBFS - Pay](#)

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

Reappointments - No Sound

Separations - No Sound

Employee Group/Class 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.

Click Next to continue

UN **IS**

PREV **NEXT**

ADOBE CAPTIVATE

Ch. 6 - Review Page**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 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 service@skits@guilford.edu

NOTE: Please check with your campus HR representative regarding which of the following courses are

[HRFE Overview](#)
[Front End. S](#)

[New Hire - N](#)

[Add a Job - N](#)

[Employee Jo](#)

[Labor Distri](#)

[Employee D](#)

[Job End Date](#)

[Reappointm](#)

[Separations](#)

[Employee Group/class 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 Application](#)

[Overview](#)

[HRFE Training](#)

[Help & Support](#)

[e Content](#)

In this chapter, you learned about information pertaining to:

- The Online HR Front End Help page

Click Next to
continue

< PREV

NEXT >



ADOBE® CAPTIVATE™

Ch. 7 - Employee Record View

The screenshot displays the 'Employee Record View' interface. At the top, a navigation bar includes links for HOME, EMPLOYEE SEARCH, ROUTING SLIP, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, a header section shows 'Full View: No 10' and a 'DATE:' field. A yellow callout box is overlaid on the center of the screen, containing the text 'You will learn about:' followed by two bullet points. The background interface shows a sidebar with 'GENERAL INFO', 'EMPLOYEE GEN', and 'JOBS' sections. The main content area displays employee details for 'U22218-00: VST TRAINING SPEC' with various attributes like ECLS, BA, TS, ORG, TYPE, FTE, MTHLY, BEGIN, END, BGT PRO, and STATUS. A 'Print Friendly View' link is visible at the bottom right of the main content area. A green callout box at the bottom right of the screen says 'Click Next to continue'. The bottom of the screen features a navigation bar with '< PREV', 'NEXT >', and a set of media control icons (play, pause, stop, etc.) and an 'ADOBE CAPTIVATE' logo.

Employee Record View

HOME EMPLOYEE SEARCH ROUTING SLIP TRANSACTIONS ADMIN TOOLS HELP LOGOUT

Full View: No 10

DATE:

Timeline View

GENERAL INFO

EMPLOYEE GEN

JOBS

U22218-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-699008 TYPE: P FTE: 1.000 MTHLY: \$3,939.84 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: K STATUS: A

Print Friendly View

Click Next to continue

< PREV NEXT >

ADOBE CAPTIVATE

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.

Employee Record View

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

UIN: 111111111 9-699008 AITS ITPC ECLS: BA Total FTE: 1.000 Base Salary: \$47,278.13 Total Salary: \$47,278.13

Full View: No Transaction: Readonly: BioDemoAccess: JobAccess-[U22218-00]

DATE: View Limited ERV Timeline View

GENERAL INFO

EMPLOYEE GENERAL

JOBS

U22218-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-699008 TYPE: P FTE: 1.000 MTHLY: \$3,939.84 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Print Friendly View

Expand All

Print Friendly View

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.

Click Next to continue

< PREV

NEXT >

Aside from the Last Name, First Name, UIN, Home Org, E-Class, FTE, and Base Salary, users will find additional information.

The screenshot shows the 'Employee Record View' interface. At the top, a navigation bar includes links for HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, a summary bar displays employee details: UIN: 111111111 9 699008 AITS ITPC ECLS: BA Total FTE: 1.000 Base Salary: \$47,278.13 Total Salary: \$47,278.13. A red box highlights the 'Full View: No Transaction: Readonly: BioDemoAccess: JobAccess-[U22218-00]' section. Below this, there are tabs for GENERAL INFO, BIO / DEMO, and JOBS. The JOBS tab is selected, showing a job record for 'U22218-00: VST TRAINING SP'. A callout box titled 'Users will also see' lists the following information:

- 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

At the bottom right, a green button says 'Click Next to continue'. The interface also includes a 'Print Friendly View' link and a 'BGT PRO: X STATUS: A' status indicator. Navigation buttons for '< PREV' and 'NEXT >' are at the bottom.

BUTTON	DESCRIPTION	BUTTON	DESCRIPTION
Add Change	After users have saved a transaction, they can add the change(s) that appear under the proposed changes accordion bar by clicking the add change button.	Route	Clicking this button will route the transaction on to the next stop in the pre-determined routing path.
Cancel	Users are able to cancel the transaction by clicking the cancel button.	Save	Clicking this button will save the information that has been entered thus far on a transaction.
Expand All	When users desire to see an expanded/collapsed view of the employee's job record, they can do so by clicking either the expand all or collapse all button.	Send FYI	Sends a read-only copy of the transaction.
Collapse All		Send To	Sends the transaction to individuals that exist outside of the pre-determined routing path.
Limited ERV	Clicking the Limited ERV button provides users with a very limited version of the Employee Record View. Clicking the Full ERV button will provide users with a complete view of an employee's record.	Request Access	When a user is in Limited ERV, they can request access to view Full ERV by clicking this button.
Full ERV		Timeline View	Accesses the Timeline View of the Employee's Record.
Print Friendly View	Provides a print-friendly view of the elements on the screen in order that the user can obtain a printable, hard copy.	View	Clicking this button will display information pertaining to a specific date which the user indicates in the res...
Release Ownership	Clicking Release Ownership will make it possible for other individuals in their permissions group to work on the transaction. Clicking Take Ownership allows the individual to have ownership of a transaction so they can edit it.		
Take Ownership			
Return	Returns the transaction to the previous stop in the routing path.		

Click Next to continue

< PREV

NEXT >



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.

Employee Record View

Full View No Transaction Readonly Bio/Demo Access Job Access [U22218 00]

DATE: View United DRV Timeline View

GENERAL INFO BIO/DEMO MEMOS ATTACHMENTS ALERT TRAIL

EMPLOYEE GENERAL INFORMATION

URN: 111111111

NAME: LAST: MIDDLE: EMPLOYEE STATUS:

HOME CHART ORG: COA: ORGANIZATION: CAMPUS:

9 - University of Illinois - Admin 699008 - AITS ITPC U - UIUC Urbana / Champaign

HIRE DATES: CURRENT: 6/4/2007 ORIGINAL: 6/4/2007 SERVICE DATES: ADJ SERVICE: 6/4/2007 AWARD: 6/4/2007 TERMINATION: LAST WK DAY: TERM DATE: REASON:

E-CLASS: BA - Acad/Pro 12mth Ben Elig BENEFIT CATEGORY: M1 - FT Monthly All Benefits RETIREMENT CODE: RP

CITIZENSHIP: US - Citizen

Print Friendly View Expand All BGT PRO: X STATUS: A Print Friendly View

UNIVERSITY OF ILLINOIS

< PREV NEXT >

ADOBE CAPTIVATE

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.

EMPLOYEE BIO-DEMO INFORMATION

WORK HISTORY

LICENSES

CERTIFICATIONS

DRIVERS LICENSES

LANGUAGES

Print Friendly View

UNIVERSITY OF ILLINOIS

PREV NEXT

ADOBE CAPTIVATE™

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

Employee Record View

TOOLS ? HELP LOGOUT

UIN: 111111111 9.699008 AITS ITPC ECLS: BA Total FTE: 1.000 Base Salary: \$47,278.13 Total Salary: \$47,278.13

Full View: No Transaction: Readonly: BioDemoAccess: JobAccess: [U22218.00]

DATE: View

Limited ERV Timeline View

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE BIO DEMO INFORMATION

SSN:	BIRTH DATE:	AGE:	GENDER:	ETHNICITY:	MARITAL STATUS:
*****	01/01/****	58	Male	5	U

VETERAN CATEGORY:

☐ SPECIAL DISABLED VETERAN

Print Friendly View

Expand All

6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Print Friendly View

ADDRESSES

Now click the Addresses accordion.

COURSES

CERTIFICATIONS

DRIVERS LICENSES

LANGUAGES

UNIVERSITY OF ILLINOIS
CHICAGO

< PREV

NEXT >



ADOBE CAPTIVATE™

Employee Record

Full View/No. Transa

DATE: View

Limited ERV Timeline View

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE BIO-DEMO INFORMATION

ADDRESSES

EMAIL

Type	Address	Preferred
U		Y

ADDRESSES

Type	Address 1	Address 2	Address 3	City	State	Zip Code	County	Nation	From Date
C1	123 First St., Suite			UIUC Campus Mail	IL	00001			4/18/2007

PHONES

Type	Number	Number Type	Intl Access
MA	217-5551234	Y	

EMERGENCY CONTACT INFORMATION

Now let's click the Emergency Contact Information accordion.

UNIVERSITY OF ILLINOIS

ADDITIONAL INFORMATION

Print Friendly View

Expand All

ID: 5/30/2009 BGT PRG: X STATUS: A

Print Friendly View

PREV NEXT

ADOBE CAPTIVATE

Employee Record View

UIN: 111111111 9

Full View: No Transaction: Readonly

DATE: View

7,278.13

Tools HELP LOGOUT

Limited ERV Timeline View

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE BIO-DEMO INFORMATION

ADDRESSES

EMERGENCY CONTACT INFORMATION

Name	Address Type	Address	Phone	Relationship	Nation	Priority
John Doe	Permanent	132 Fourth Avenue	217-5551235			1

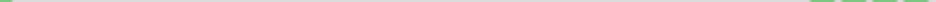
EDUCATION

Now let's click the Education accordion.

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™


 ADOBE® CAPTIVATE™

Employee Record View

UIN: 111111111 9.65% / \$47,278.13

Full View: No Transaction: Readonly: E

DATE: View

ADMIN TOOLS HELP LOGOUT

GENERAL INFO BIO / DEMO

EMPLOYEE BIO-DEMO INFORMATION

ADDRESSES

EMERGENCY CONTACT INFORMATION

EDUCATION

WORK HISTORY

LICENSES

LICENSES

Title	Number	Date Acquired	Renewal Date	Expiration Date	State	Nation	Issuing Agency
NONE							

CERTIFICATIONS

Print Friendly View

Expand All

BGT PRO: X STATUS: A

Print Friendly View

Now let's click the Certifications accordion.

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™

Employee Record View

UIN: 111111111 9 499
Full View: No Transaction: Readonly: 1
DATE: View

ADMIN TOOLS HELP LOGOUT
Salary: \$47,278.13
Limited ERV Timeline View

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE BIO DEMO INFORMATION
ADDRESSES
EMERGENCY CONTACT INFORMATION
EDUCATION
WORK HISTORY
LICENSES
CERTIFICATIONS

CERTIFICATIONS

Title	Number	Date Acquired	Renewal Date	Expiration Date	State	Nation	Issuing Agency
NONE							

DRIVERS LICENSES

Now let's click the Drivers Licenses accordion.

Print Friendly View
Expand All
TPRO: X STATUS: A
Print Friendly View

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

ADOBE CAPTIVATE™

Employee Record View

UIN: 111111111 9

Full View: No Transaction: Read Only

DATE: View

TOOLS ? HELP LOGOUT

7/27/13

United ERV Timeline View

GENERAL INFO BIO/DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE BIO/DEMO INFORMATION

ADDRESSES

EMERGENCY CONTACT INFORMATION

EDUCATION

WORK HISTORY

LICENSES

CERTIFICATIONS

DRIVERS LICENSES

DRIVERS LICENSE

Class	Status	License Number	State	Nation	Effective Date	Expiration Date
Passenger Driver's License	Current	P435291*****	Illinois	United States of America	3/9/2005	3/16/2009

LANGUAGES

Now let's click the Languages accordion.

UNIVERSITY OF ILLINOIS

< PREV NEXT >

ADOBE CAPTIVATE™

Employee Record View

UIN: 111111111 9

Full View: No Transaction: Read on

DATE: View

TOOLS ? HELP LOGOUT

17,278.13

Print Friendly View

Timeline View

GENERAL INFO BIO / DEMO MEMOS ATTACHMENTS AUDIT TRAIL

EMPLOYEE BIO / DEMO INFORMATION

ADDRESSES

EMERGENCY CONTACT INFORMATION

EDUCATION

WORK HISTORY

LICENSES

CERTIFICATIONS

DRIVERS LICENSES

LANGUAGES

LANGUAGES

Language Read Write Speak Translate Teach Native

NONE

Print Friendly View

Expand All

1,939.84 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Print Friendly View

Now let's explore the remaining three tabs in this section.

Click the Next button to continue.

< PREV

NEXT >

Adobe CAPTIVATE™

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.

Employee Record View

UIN: 111111111.9

Full View No Transaction Header

DATE: View

Linked ERV Timeline View

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

EMPLOYEE GENERAL INFORMATION

Print Friendly View

Expand All

U22218-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-699006 TYPE: P FTE: 1.000 MTHLY: \$3,939.84 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Print Friendly View

UNIVERSITY OF ILLINOIS

PREV NEXT

ADOBE CAPTIVATE

The Memos tab allows you to enter memos that other users along the routing path of the transaction can read.

Employee Record View

HOME EMPLOYEE SEARCH REQUEST BOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

IDN: 111111111 9-099008-AITS-ITPC ECLS: BA Total ETE: 1.000 Base Salary: \$47,278.13 Total Salary: \$47,278.13

Full View No Transaction: Readonly: BioDemoAccess: JobAccess: [022218.00]

DATE: View Limited DRV Timeline View

GENERAL INFO BIO / DEV MEMOS ATTACHMENTS ALERT TRAIL

Transaction Memos

Memo	UserID	Date
I can add a memo to a transaction.	public	09-11-2008 10:12:42

Add

Print Friendly View

Expand All

1/30/2009 BGT PRO: X STATUS: A

Print Friendly View

UNIVERSITY OF ILLINOIS

< PREV NEXT >

ADOBE CAPTIVATE

Enter the following text as a memo:

I can add a memo to a transaction.

Click Add to add the memo.

HR Front End Overview and Navigation Course

Ch7. Employee Record View

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

Employee Record View

HOME EMPLOYEE SEARCH INQUIRIES TRANSACTIONS ADMIN TOOLS HELP LOGIN

URL: 111111111 3.629008 AITS ITPC ECLS: BA Total FTE: 1.000 Base Salary: \$47,278.12 Total Salary: \$47,278.12

Full View No Transaction Readonly BioDemo Access Job Access [022218 00]

DATE: [] View Limited BioV Timeline View

GENERAL INFO BIO / DES MEMOS **ATTACHMENTS** []

Transaction Memos

Memo	User ID
I can add a memo to a transaction.	public
	public

Add

REGRE 07/07/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Print Friendly View Expand All

Print Friendly View

UNIVERSITY OF ILLINOIS
CHICAGO

< PREV NEXT >

ADOBE CAPTIVATE

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.

Employee Record View

UIN: 111111111 9-699008 AITS: ITPC ECLS: BA Total FTE: 1.000 Base Salary: \$47,278.13 Total Salary: \$47,278.13

Full View No Transaction: Readonly Bio Demo Access: Job Access: [U22218 00]

DATE: View United EPV Timeline View

GENERAL INFO BIO / DEMO MEMOS **ATTACHMENTS** BUDGET TRACK

Title	Doc Type	Description	Viewable Orgs
<input type="button" value="Add Attachment"/> <input type="button" value="Save"/>			
<input type="button" value="Print Friendly View"/>			
<input type="button" value="Expand All"/>			
<input type="button" value="Print Friendly View"/>			

U22218 BA TS ORG: 9-699008 TYPE: P FTE: 1.000 MTHLY: \$2,939.84 BEGR: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

< PREV NEXT >

ADOBE CAPTIVATE

Attach Document

HELPLOGOUT

1111111119-699008-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, click the **Remove** button.

BrowseAdd

ATTACHMENTS TO BE UPLOADED

Title	Doc Type	Description

UploadDone

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

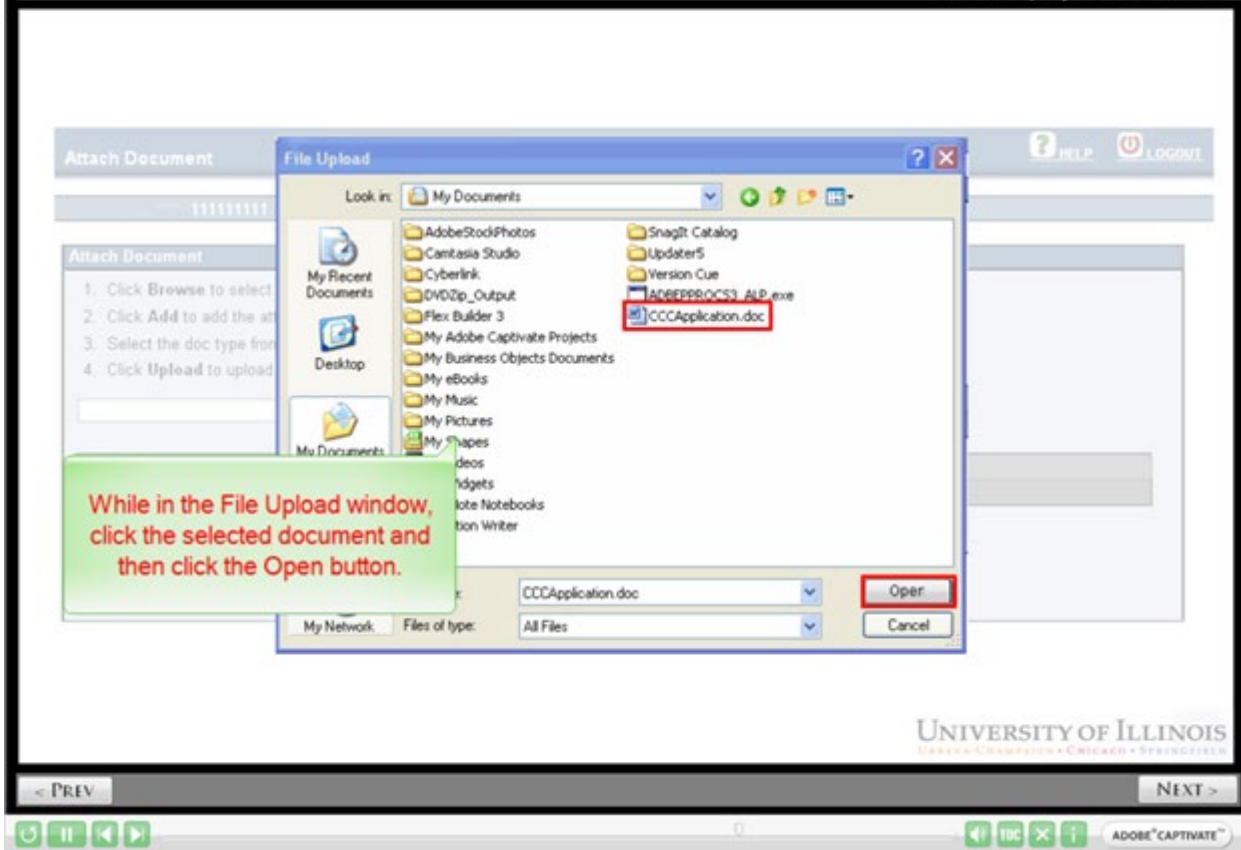
< PREVNEXT >

0

TBC

ADOBE CAPTIVATE™

To browse for documentation to attach, click the Browse button.



Attach Document

HELP LOGOUT

111111111 9.699008 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 for each additional document.
3. Select the doc type from the drop-down list and press the **Enter** key.
4. Click **Upload** to upload the attachment to the system.



below and click **Remove**.

C:\Documents and Settings\public\My Documents\CCCApplication.doc

ATTACHMENTS TO BE UPLOADED		
Title	Doc Type	Description
<input type="button" value="Upload"/> <input type="button" value="Done"/>		

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV NEXT >

  ADOBE CAPTIVATE™

Attach Document

 HELP
 LOGOUT

111111111 9.699008 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.

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 **Remove**.

	Title	Doc Type	Description
Remove	CCCApplication.doc	PLEASE SELECT	Application

3
Upload
Done

1

ATTACHMENTS TO BE UPLOADED

	Title	Doc Type	Description
Remove	CCCApplication.doc	PLEASE SELECT	Application

PLEASE SELECT

BEN CMS BENEF CHOIC
 BEN CMS BENEFICIARY
 BEN CMS BUDGET RES
BEN CMS CHANGE OF STATUS
 BENEFIT NEW ENROLL
 BENEFITS ACTION FORM
 BENEFITS CHILD SUPPORT
 CIVIL SERV. SENIORITY ADJUST. UPDATES
 CIVIL SERV. TRANSFER SCORES

< PREV
NEXT >

ADOBE CAPTIVATE™

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.

Attach Document

• File (CCCApplication.doc) has been uploaded

111111111 9.699008 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

Title	Type	Description
-------	------	-------------

Click the Done button to continue

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV

NEXT >



ADOBE CAPTIVATE™

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.

Employee Record View

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

UIN: 111111111 9-699008 AITS 11PC ECLS: BA Total FTE: 1.000 Base Salary: \$47,278.13 Total Salary: \$47,278.13

Full View No Transaction: Readonly: BioDemoAccess: JobAccess: [U22218-00]

DATE: View Limited DRV Timeline View

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

EMPLOYEE GENERAL INFORMATION

JOBS

U22218-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-699008 TYPE: P FTE: 1.000 MTHLY: \$3,939.84 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

UNIVERSITY OF ILLINOIS

< PREV NEXT >

ADOBE CAPTIVATE

The Audit Trail feature allows you to track the changes that have been made along the routing path of a transaction.

Employee Record View

HOME EMPLOYEE SEARCH IN/OUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

UIN: 111111111 5-699008-AITS ITPC ECLS: BA Total FTE: 1.000 Base Salary: \$47,278.13 Total Salary: \$47,278.13

Full View/No Transaction/Readonly/BioDemoAccess/JobAccess-[U22218-00]

DATE: View Linked ERV Timeline View

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

Action	Action Timestamp	Stop	Owner	Changes/Notes
TAKE OWNERSHIP	2008-09-11 10:12:37.0	CAMPUS.Default:Initiate B U-9-AB-699-699008 (1760-4222)	Public, John	
CREATE TRANSACTION (1760)	2008-09-11			
ROUTED	2008-09-11			
DATA CHANGE: EMPDATA (4000)	2008-09-11			Changed "SUFFD" from "I" to "II"

U22218-00: VST TRAINING SPEC ECLS

2009 BGT PRO: X STATUS: A

Print Friendly View

UN IS

Click Next to continue

< PREV NEXT >

ADOBE CAPTIVATE

One additional tab that might appear in the Employee Record View.
This tab contains information pertaining to the Federal Work Study.

Employee Record View

1336000 Intercollegiate Athletics ECLS: SA

Full View: No Transaction:ReadOnly:BioDemoAccess:JobAccess=[U05307.35, U98325.01, U91621.01, U05307.38, U99048.00, U99931.00, U91621.00, U98325.00, U05307.37, U98325.03, U98325.02, U05630.00, U05307.39]

DATE: 5/16/2009 View Limited ERV Timeline View

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

FWS INFORMATION

AID YEAR:
0009

AWARDS:

Fund	Status	Offered	Accepted	Paid	Remaining
1100WS, Federal Work Study	Accepted	\$3,000.00	\$3,000.00	0.00	\$3,000.00

JOB:

Position	Suffix	Placement	Job Title	Status	Pay Rate	Auth Hours	Auth Earnings	Stipend	Auth Start	Auth End	Pay Start	Pay End
U98325	00	On Campus Employment	Technical	Authorized	8.5	88.24	\$750.00	0.00	9/7/2008	5/16/2009	9/7/2008	5/16/2009
U98325	01	On Campus Employment	Technical	Authorized	8.5	88.24	\$750.00	0.00	9/7/2008	5/16/2009	9/7/2008	5/16/2009
U98325	02	On Campus Employment	Technical	Authorized	8.5	88.24	\$750.00	0.00	9/7/2008	5/16/2009	9/7/2008	5/16/2009
U98325	03	On Campus Employment	Technical	Authorized	8.5	88.24	\$750.00	0.00	9/7/2008	5/16/2009	9/7/2008	5/16/2009

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

Click Next to continue

PREV NEXT

ADOBE CAPTIVATE

The screenshot displays the 'Employee Record View' interface for the University of Illinois. At the top, there's a header bar with 'HR Front End Overview and Navigation Course' and 'Ch7. Employee Record View'. Below this, the main content area is titled 'Employee Record View' and shows a summary of an employee's record. A yellow callout box explains that the 'Jobs' tab provides information about jobs held at the University of Illinois, noting that job information is condensed in an accordion layout for expandable viewing.

The 'JOBS' tab is selected, showing a list of job positions. A green callout box instructs the user to 'Let's explore the Job Detail. Click the Job Detail accordion'. The 'JOB DETAIL' accordion is expanded, revealing a table with columns for 'JOB DETAIL', 'BGT PRO: X', and 'STATUS: A'. The table contains several rows of job data. Below the table, there's a section for 'FACULTY RANK & TENURE'.

The interface includes navigation controls at the bottom, such as '< PREV' and 'NEXT >', and a status bar with 'ADOBE CAPTIVATE'.

Employee Record View

HOME EMPLOYEE SEARCH INQUIRIES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

UIN: 11111111

Full View: No Transaction: No

DATE: / /

GENERAL INFO JOB INFO

EMPLOYEE GENERAL INFORMATION

Print Friendly View

Expand All

107 END: 5/30/2009 BGT PRO: X STATUS: A

Print Friendly View

JOBS

002218-00-TRAINING SPEC ECLS: GA TS ORG: 9-00000 TYPE: P FTE: 0.670 MONTHLY: \$2,575.31 BEGIN: 04/2007 END: 5/30/2009 BGT PRO: X STATUS: A

Job Detail

DATES: PERSONNEL DATE: EFFECTIVE DATE: LAST PAID DATE: JOB BEGIN DATE: JOB END DATE:

POSITION: SUBJOB: POSITION CLASS: JOB TITLE: JOB TYPE:

PAY ID: FACTOR: JOB FTE: ADPT % PAY RATE: MONTHLY: ANNUAL: JOB STATUS:

JOB CHANGE REASON: TIME SHEET: COA: ORG: TIME ENTRY METHOD:

JOB EMPLOYEE CLASS: LEAVE CATEGORY: ACCRUE LEAVE:

SALARY: TABLE: GRADE: STEPS PROBATIONARY: PROB PERIOD: BEGIN DATE: END DATE: INCREASE BRIDGE: AMBY DATE:

BUDGET PROFILE CODE: BARGAINING UNIT: HOURS PER DAY:

JOB COMMENTS

Comments	Userid	Date

Job Labor Distributions

Click the Job Labor Distribution accordion.

UNIVERSITY OF ILLINOIS
Urbana-Champaign • Champaign • Springfield

PREV NEXT

ADOBE CAPTIVATE™

143

Employee Record View

HOME EMPLOYEE SEARCH INOUTBOXES TRANSACTIONS ADMIN TOOLS HELP LOGOUT

UN: 111111111 7/27/11

Full View: Transaction Headers

DATE: View

Linked EPV Timeline View

GENERAL INFO JOB / DEMO MEMOS ATTACHMENTS ADJUST TARI

EMPLOYEE GENERAL INFORMATION

Print Friendly View

Expand All

JOB

122210-02 TRAINING SPEC ECL: 04 TS ORG: 3-01003 TYPE: P FTE: 0.070 MTNLY: \$1,575.31 BEGIN: 5/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

JOB INFO

JOB ASSIGN DISTRIBUTIONS

POSITION DATA

CHANGE DATE: POSITION R: POSITION CLASS: POSITION TITLE: POSITION EMPLOYEE CLASS:

TYPE: POSITION BEGIN DATE: PAPER: SALARY GRADE: TABLE: GRADE: STEP: SALARY PAUSE LOW: HIGH: HIRE

BARGAINING UNIT: PROB PERIOD: ACQUIRE SENIORITY: JOB PROGRESSION:

POSITION DESCRIPTIONS:

BUDGET PROFILE: BUDGET CODE: BUDGET ORG:

Click the Work Schedules accordion.

Urban Account Program Activity Location Percent

TOTALS

WORK SCHEDULES

SERVICE DATES & CONTRACT PARAMETERS

DEBULT EARNINGS

FACULTY HIRE & TENURE

UNIVERSITY OF ILLINOIS

PREV NEXT

ADOBE CAPTIVATE

Employee Record View

UIN: 1111111

Full View: No Transaction History

DATE: View

GENERAL INFO | JOB | EMPLOYEE GENERAL INFORMATION

Print Friendly View

Expand All

BGT PRO: X STATUS: A

Print Friendly View

JOBS

U22218-00: TRAINING SPEC ECLS: BA TS ORG: 9-699008 TYPE: P FTE: 0.670 MTHLY: \$2,575.31 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A

JOB DETAIL

JOB LABOR DISTRIBUTIONS

POSITION DATA

WORK SCHEDULES

WORK SCHEDULE: END DATE: DEEMED HOURS: BASE EARNING CODE: BEGIN DAY: EFFECTIVE DATE:

DAY	1	2	3	4	5	6	7	8	9	10	11	12	13	14
SHIFT														
HOURS														

SERVICE DATES & CONTRACT PARAMETERS

BASE EARNINGS

Click the Service Dates and Contract Parameters accordion.

UNIVERSITY OF ILLINOIS

PREV NEXT

ADOBE CAPTIVATE

Employee Record View

UIN: 111111

Full View: No Transaction: R

DATE: / /

GENERAL INFO

EMPLOYEE GENERAL INFORMATION

Print Friendly View

JOBS

U22218.00: TRAINING SPEC ECLS: BA TS ORG: 9-899000 TYPE: P FTE: 0.670 MTBLY: \$2,575.31 BEGIN: 6/4/2007 END: 5/30/2009 BGT PRO: X STATUS: A BGT PRO: X STATUS: A

Expand All

Print Friendly View

JOB DETAIL

JOB LABOR DISTRIBUTIONS

POSITION DATA

WORK SCHEDULES

SERVICE DATES & CONTRACT PARAMETERS

SERVICE DATES

BEGIN: / / END: / /

SALARY COMMITMENT: / /

EFFECTIVE DATE: / /

CONTRACT PARAMETERS: / /

DEFAULT EARNINGS

Click the Default Earnings accordion.

UNIVERSITY OF ILLINOIS

PREV NEXT

ADOBE CAPTIVATE

147

Employee Record View

UIN: 11111111

Full View: No Transaction: Rel

DATE: View

GENERAL INFO BIO / DS

EMPLOYEE GENERAL INFORMATION

JOBS

U22218-00: TRAINING SPEC ECLS: BA TS ORG: 9-699008 TYPE: P FTE: 0.670 MTHLY: \$2,575.31 BEGR: 6/4/2007 END: 5/30/2009 BGT PRI: X STATUS: A

JOB DETAIL

JOB LABOR DISTRIBUTIONS

POSITION DATA

WORK SCHEDULES

SERVICE DATES & CONTRACT PARAMETERS

DEFAULT EARNINGS

FACULTY RANK & TENURE

Rank	Tenure Code	Probationary Year	Tenure Org	Tenure FTE
Professor	Indefinite Tenure	N/A	640 - Educational Policy Studies	1.0

Click Next to continue

< PREV NEXT >

UNIVERSITY OF CALIFORNIA

ADOBE CAPTIVATE™

Ch. 7 - Review Page

The screenshot displays the 'Employee Record View' interface. At the top, a navigation bar includes links for HOME, EMPLOYEE SEARCH, ROUTINGS, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, a header section shows the title 'Employee Record View' and a summary of employee data: ID: 111111111, 9-699008, AITS:TPC, ECLS: BA, Total FTE: 1.000, Base Salary: \$47,278.13, and Total Salary: \$47,278.13. A central yellow overlay box contains the text 'You learned about information pertaining to:' followed by two bullet points: 'The Interface of the Employee Record View in the HR Front End' and 'The interrelatedness of other features in the application and the Employee Record View'. The background interface shows tabs for GENERAL INFO, EMPLOYEE GENERAL INFO, and JOBS. A data row is visible with details: U22218-00: VST TRAINING SPEC, ECLS: BA, TS ORG: 9-699008, TYPE: P, FTE: 1.000, MTHLY: \$3,939.84, BEG: 6/4/2007, END: 5/30/2009, BGT PRG: X, STATUS: A. A green callout bubble in the bottom right corner says 'Click Next to continue'. The bottom of the screen features a navigation bar with '< PREV' and 'NEXT >' buttons, and a footer with a progress bar and 'ADOBE CAPTIVATE' logo.

Employee Record View

HOME EMPLOYEE SEARCH ROUTINGS TRANSACTIONS ADMIN TOOLS HELP LOGOUT

ID: 111111111 9-699008 AITS:TPC ECLS: BA Total FTE: 1.000 Base Salary: \$47,278.13 Total Salary: \$47,278.13

Full View: No Transaction

DATE: [] Unified DRV Timeline View

GENERAL INFO []

EMPLOYEE GENERAL INFO []

JOBS []

U22218-00: VST TRAINING SPEC ECLS: BA TS ORG: 9-699008 TYPE: P FTE: 1.000 MTHLY: \$3,939.84 BEG: 6/4/2007 END: 5/30/2009 BGT PRG: X STATUS: A

Print Friendly View Expand All

Click Next to continue

< PREV NEXT >

ADOBE CAPTIVATE

Ch. 8 - Timeline View

The screenshot shows the HR Front End interface for the Timeline View. At the top, there are several filter checkboxes: ☐ Jobs I Own, ☐ Job Changes, ☐ Labor Distributions, ☐ Work Schedules, ☐ Date & Contract Params, and ☐ Default Earnings. A note states: "* Denotes multiple transactions on the same date." Below these is a "START DATE:" field with a calendar icon. The main area displays a timeline with months "Aug" and "Sep" visible, each with a series of vertical bars representing transactions. Navigation buttons include "<< PREVIOUS", "Aug", "Sep", "0", "NEXT >>", and "ERV". A yellow callout box in the center contains the text "You will learn about:" followed by two bullet points:

- The Interface of the Timeline View in the HR Front End
- How to access and use the Timeline View

At the bottom right, a green button says "Click Next to continue". The bottom of the screen features a navigation bar with "< PREV" and "NEXT >" buttons, and a footer with icons for back, forward, and search, along with the text "ADOBE CAPTIVATE™".

The screenshot displays the 'Employee Record View' page in the HR Front End system. At the top, there are navigation links: HOME, EMPLOYEE SEARCH, IN/OUTBOXES, and LOGOUT. Below these, a header bar contains employee details: UIIN: 111111111 8439908 AITS ITPC ECLS: BA Total FTE: 1.000 Base Salary: Full View: No Transaction: Readonly: BioDemoAccess: JobAccess: [U22218-00]. A 'DATE:' field with a 'View' button is also present. On the right, there are buttons for 'United IDV' and 'Timeline View', with the latter highlighted by a red box and a green callout bubble that says 'Click the Timeline View button to access the Timeline View feature.'

Below the header, there are tabs for GENERAL INFO, BIO / DEMO, MEMOS, ATTACHMENTS, and AUDIT TRAIL. The 'GENERAL INFO' tab is selected, showing 'EMPLOYEE GENERAL INFORMATION'. A yellow callout bubble in the center of the screen states: '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.'

Under the 'JOBS' section, a job record is visible: U22218-00: VST TRAINING SPEC ECLS: BA. To the right of this record, there are buttons for 'Print Friendly View', 'Expand All', and another 'Print Friendly View' button. Further right, there is a status bar showing 'MD: 5/30/2009 BGT PRO: X STATUS: A'.

At the bottom of the page, there are navigation buttons: '< PREV' and 'NEXT >'. The footer includes the 'UNIVERSITY OF ILLINOIS' logo and the text 'CHAMPAIGN • URBANA • SPRINGFIELD'. The bottom of the screen shows a video player interface with standard controls and the 'ADOBE CAPTIVATE' logo.

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.

The screenshot shows the 'Appointment Year' section of the HR Front End. At the top, there are several checkboxes: 'Jobs I Own' (checked), 'Job Changes' (checked), 'Labor Distributions' (unchecked), 'Work Schedules' (unchecked), 'Date & Contract Params' (unchecked), and 'Default Earnings' (unchecked). A note states: '* Denotes multiple transactions on the same date.' Below this is a 'START DATE' field containing '08/16/2008' and a 'Refresh' button. The 'Appointment Year' is set to '2008'. A calendar view shows the months from August to August. A green callout box with red text provides the following instructions:

- Enter a Start Date of 08/16/2008
- Click the Refresh button to see results

The bottom of the screen features a navigation bar with '< PREV' and 'NEXT >' buttons, and a footer with 'UNIVERSITY OF ILLINOIS' and 'ADOBE CAPTIVATE'.

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.

☒ Jobs I Own
 ☒ Job Changes
 ☐ Labor Distributions
 ☐ Work Schedules
 ☐ Date & Contract Params
 ☐ Default Earnings
 * Denotes multiple transactions on the same date.

START DATE: 08/16/2008 Refresh Appointment Year: 2009 Calendar ERY

<< PREVIOUS Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug NEXT >>

JOB	JOB: C89544.00	E-CLASS:	TS CHART/ORG	JOB TYPE:	FTE:	ANNUAL:	MTHLY:	HRLY:	BEGIN:	END:	BGT PRO:	S
	SOC WAIDE 2	CA-CS	2-496000 Div of		1.0			13.030	07/01/2007		BO-Open	

JOB CHANGES: 01/13/2008

TITLE:	FTE:	ANNUAL:	MTHLY:	HRLY:	LAST CHANGE:	PERS DT:	EFF DT:	E
SOC WAIDE 2 (LCDA)	1.0			13.030	Annual Increase	01/13/2008	01/13/2008	0

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.

UNIVERSITY OF ILLINOIS
Urbana-Champaign • Champaign • Springfield

< PREV

NEXT >



ADOBE® CAPTIVATE™

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.

<input checked="" type="checkbox"/> Jobs I Own	<input checked="" type="checkbox"/> Job Changes
START DATE: 08/1/07	JOB: C89544-00 E-CLASS: CA-CS TS CHART/ORG: 2-496000 Div of Specializ Care for GP FTE: 1.0 ANNUAL: Increase MTHLY: 12.670 HRLY: 07/01/2007 BEGIN: 07/01/2007 END: BGT PRO: Range - Grant STATUS: TEN: A
JOB	SOC WAIDE 2 (LCDA)
JOB CHANGES	<div> <div>01/13/2008</div> <div> <div>01/13/2008</div> <div>01/13/2008</div> </div> </div>

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.

☒ Jobs I Own
 ☒ Job Changes
 ☐ Labor Distributions
 ☐ Work Schedules
 ☐ Date & Contract Params
 ☐ Default Earnings
 * Denotes multiple transactions on the same date.

START DATE: 08/16/2008 Refresh Appointment Year: 2009 Calendar ERV

<< PREVIOUS Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug NEXT >>

JOB	JOB ID	E-CLASS:	TS CHART/ORG	JOB TYPE:	FTE:	ANNUAL:	MTHLY:	HRLY:	BEGIN:	END:	BGT PRO:	S
JOB CHANGES	JOB: C89544-00											
	TITLE: (LCDA)	1.0	FTE:	ANNUAL:	MTHLY:	HRLY:	LAST CHANGE:	PERS DT:	EFF DT:	END DT:		
	SOC W AIDE 2 (LCDA)	1.0				13.030	Annual Increase	01/13/2008	01/13/2008	08/13/2009		

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.

UNIVERSITY OF ILLINOIS
Urbana-Champaign • Chicago • Springfield

< PREV

NEXT >



ADOBE® CAPTIVATE™

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.

The screenshot displays the HR Front End Timeline View. A pop-up box titled "Going to ERV" is centered on the screen. Inside the pop-up, a calendar shows the date "01/6/XXXX" selected. Below the calendar, a text box displays "Selected Date: 01/6/XXXX". Two buttons, "ERV" and "Back", are positioned below the text box. The background shows the Timeline View interface with a "START DATE" of "08/16/2008" and a "JOB" entry for "JOB:C89544.00 E-CL". A green callout bubble in the bottom right corner says "Click Next to continue".

Jobs I Own Job Changes Labor

START DATE: 08/16/2008 Refresh

<< PREVIOUS Aug Sep Oct

JOB

JOB:C89544.00 E-CL

SOC WAIDE 2 CA-C

JOB CHANGES

< 01/13/2008

TITLE:

SOC WAIDE 2 (LCDA)

Going to ERV

01/6/XXXX

Today

Selected Date: 01/6/XXXX

ERV Back

Click Next to continue

UN

PREV NEXT

ADOBE CAPTIVATE

Ch. 8 - Review Page

The screenshot shows the HR Front End Timeline View interface. At the top, there are several filter checkboxes: ☐ Jobs I Own, ☐ Job Changes, ☐ Labor Distributions, ☐ Work Schedules, ☐ Date & Contract Params, and ☐ Default Earnings. A note states: "* Denotes multiple transactions on the same date." Below these is a "START DATE:" field with a calendar icon. The main area displays a timeline for August and September, with a "NEXT >>" button on the right. A yellow overlay box in the center contains the following text:

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

< PREV

NEXT >



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.

COMPLETE COURSE

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

< PREV

BEGIN COURSE



ADOBE® CAPTIVATE™