

Colorado State University

Human Resource Management System User Guide

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Unit 1: HRMS Basics

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How this Guide is Organized

Welcome to Colorado State University's training guide for the Human Resource Management System.

This guide is designed to be used as an on-the-job reference. It is divided into eleven units and an appendix. At the beginning of each unit is a list of the topics covered in the unit. The major units in this guide are outlined below.

Unit 1: Oracle Basics

Unit 1 provides you with a list of tools for navigating in the HR system, data entry standards, toolbar icons, and keyboard shortcuts. It also explains how to log in to the HR system and change your password.

Unit 2: DateTracking

This unit defines DateTracking and explains how to complete tasks such as updating and correcting information and viewing DateTrack history.

Unit 3: Hiring a New CSU Employee

Unit 3 takes you through the steps required to hire a new employee.

Unit 4: Electronic Approvals

This unit explains the steps involved in electronically approving assignment actions in the HR system. It also explains how to check the status of a pending approval.

Unit 5: Maintaining Existing CSU Employees

Here, we explain how to complete tasks that are related to maintaining existing employees at CSU. This includes transferring and promoting employees, creating new concurrent assignments, changing a salary, and terminating an employee. It also covers other miscellaneous data maintenance tasks, such as updating addresses and correcting SSNs.

Unit 6: Summer Session Appointments

This unit provides detailed information on creating, reactivating, and editing summer session appointments and labor schedules.

Unit 7: Labor Distribution

Unit 7 provides instructions on setting up a labor schedule, creating a labor redistribution, and viewing an employee's past distributions.

Unit 8: Time Entry, Timeclock Software, and Timecard Approvals

Unit 8 explains how to enter and submit time for payroll. It also covers using timeclock software to allow hourly employees to clock in and out of jobs using a PC and how the timeclock supervisors approve time entered via timeclocks and timeclock software.

Unit 9: Performance Evaluation Module

This unit describes the use of the Performance Evaluation module for State Classified employees.

Unit 10: Sick and Annual Leave Module

Here, you'll learn how to record employee absences in the Oracle Leave Module and print reports which provide information such as employee leave balances.

Unit 11: Data Views and Folders

This unit explains how to gather data on employees in your department using pre-defined reports in the HR system.

Appendix

The appendix includes sample forms and quick help guides

Keyboard Shortcuts

Many actions that can be performed with the mouse can also be accomplished using function keys on the keyboard. The following is a list of keyboard shortcuts.

Table 1-1: Keyboard Shortcuts

Key	Action
F4	Close Current Form
Ctrl-F4	Close Top Form
Shift-F5	Duplicate Field
F6	Delete Unsaved Record
Shift-F6	Duplicate Record
Shift-F7	Next Primary Key
F8	Clear Form
F11	Enter Query
Ctrl-F11	Execute Query
Tab	Next Field
Shift-Tab	Previous Field
Page Down	Scroll Down
Shift-Page Down	Next Block
Page Up	Scroll Up
Shift-Page Up	Previous Block
Down Arrow	Next Record
Ctrl-Down Arrow	Insert Blank Record
Up Arrow	Previous Record
Ctrl-Up Arrow	Delete Current Record
Shift-Ctrl-E	Display Error

Table 1-1: Keyboard Shortcuts

Key	Action
Ctrl-K	Show Shortcut Keys
Ctrl-L	Display List of Values
Ctrl-P	Print Current Form
Ctrl-S	Save
Ctrl-U	Update Record

Data Entry Standards

Before using Oracle Applications, familiarize yourself with the following formats for data entry:

Table 1-2: Data Entry Standards

Data	Format
Text	Text is case-sensitive; use upper- and lower-case letters
Name	Do not use any special characters except - and ‘
Telephone Numbers	Enter telephone numbers as follows: (xxx) xxx-xxxx
Dates	Enter dates as follows: dd-mmm-yyyy (01-JAN-2005). Some fields permit an abbreviation: dmmmyy.
Social Security Numbers	Enter social security numbers as follows: xxx-xx-xxxx

Logging on to the HR System

- 1. With the cursor in the Username field, enter your user name. (This field is not case sensitive.)**
- 2. Enter your password in the next field.**
- 3. Click the Login button or press Enter.**

Updating Your Password

For security purposes, your password will automatically expire every 120 days, although you can change your password at any time. Your password must contain a minimum of five characters and should consist of letters, numbers, and symbols.

- 1. Choose Edit -> Preferences -> Change Password... from the drop-down menu at the top of the screen.**

2. In the Old Password field, type your old password.
3. In the New Password field, type your new password.
4. In the Re-enter New Password field, re-type your new password.
5. Click OK.

Selecting a Responsibility

A responsibility is equivalent to a department or college. Responsibilities are used to restrict access to employment information. Each Oracle user has at least one responsibility, any number of users can share the same responsibility, and a user can have access to any number of responsibilities. To select a responsibility, use one of the following methods:

1. After logging on to the HR system, users who have access to more than one responsibility will be given a list to select from.

If you have access to only a single responsibility, you will be taken directly to the Navigator screen.

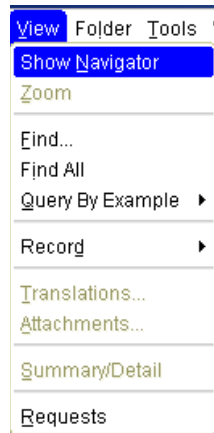
2. Select the desired responsibility by clicking on its name. A processing window opens. You can minimize this window, but it must remain open while you are using the HR system.
3. The Navigator screen opens next. This is the point from which all your work in the HR system will start.

Oracle Menu and Toolbar

At the top of the Oracle window is a list of pull-down menus called the main menu bar. You can use these menus to navigate around a form, edit or retrieve data, or perform various other actions.

File Edit View Folder Tools Window Help

To open a menu, you can either click the menu name or press the Alt key and the letter that is underlined in the menu name. For example, to access the View menu, either click on View or press Alt-V.



The pull-down menus contain several commands to choose from. To choose one of these commands, click the command name.

In addition to using keyboard shortcuts and the menu bar, you can perform functions by choosing icons from the toolbar which appears below the main menu bar in the main window. Each button performs a specific function when you click on it.

Table 1-3: Application Toolbar Functions















Icon	Function	Description
	Navigate To	Returns to the Navigator
	Zoom	Navigates to the defined zoom form
	Save	Saves changes
	Close form	Closes top form or window
	Print	Prints the record/form
	Find	Displays Find window
	New Record	Inserts a new record
	Delete Record	Deletes current record from database

Table 1-3: Application Toolbar Functions

Icon	Function	Description
	List of Values (LOV)	Displays a list of valid values for the current field
	DateTrack	Opens Alter Effective Date window
	DateTrack History	Displays changes made to a DateTracked record
	Cut	Moves the selected text to the clipboard for pasting to another location
	Copy	Copies the selected text to the clipboard for copying to another location
	Paste	Places the contents of the clipboard at the cursor position

Using the Navigator

The Navigator window is the point from which you open forms to accomplish specific tasks. The window is always present during your Oracle session and displays your current responsibility (department) in its title bar. The forms that you can navigate to are displayed in a list on the left side of the Navigator window.

The list is organized in a hierarchy system, where you can expand items preceded by a plus sign (+) to sub-levels until you find the form you wish to navigate to. Sub-levels appear indented below the items from which they are expanded. Items that are expanded are preceded by a minus sign (-).

1. To expand or collapse an entry to its next sub-level, choose one of the following methods:

- Double-click on the entry, or
- Select the entry and click Open, or
- Select the entry and click one of the following buttons:



2. To expand or collapse several entries at once, click one of the following buttons:



Creating a “Top Ten” List

On the right side of the Navigator window is an area which can be customized with a list of up to ten forms or windows you use frequently.

1. To add a form to your list, highlight the desired form in the list on the left side of the Navigator window and click the Add button on the right side.
2. To remove a form from your list, highlight the form in the customized list and click the Remove button.

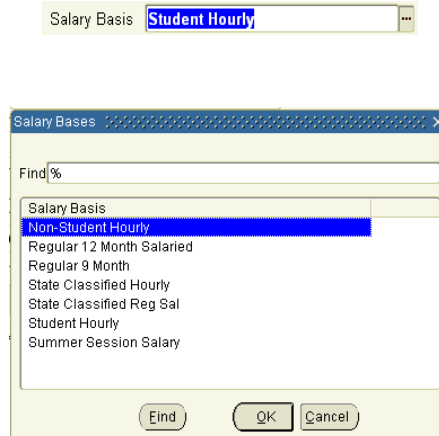
The “Top Ten” list displays your forms numerically so you can select them by typing the number of the entry. For example, to jump directly to your approvals list, type 5 on your keyboard.



Using a List of Values

A List of Values (LOV) exists for many fields in HR and lists the values that can be used to populate a particular field. To determine if an LOV exists, place the cursor in the field you wish to populate. A list of values is available for a field when the LOV icon (an ellipsis “…”) appears at the right side of the field. When you open an LOV, the values appear in a window with a title that describes the contents. Choose the appropriate value from the list.

The Salary Basis field on the Assignment screen has the following LOV.



To quickly select the appropriate value for a field, you can type in the first few letters and press Tab. If there is only one matching value, the field will automatically populate with that value. If there is more than one possible value, a list of those values will display.

For example, to enter "Student Hourly" in the Salary Basis field above, type "stu" and press Tab. If you typed only "st", you would be given a choice of two "State Classified" bases and "Student".