PeopleSoft Training

Workforce Administration 9.1 - HCSD

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Table of Contents

Workforce Administration 9.1 - HCSD 1

Manage Positions 1
Create a Position 1
Update Position Data 7
Run a Query 11

Employment Actions 15
Add a Person - Classified 15
Add a Person - Unclassified 35
Record an Employee Data Change 73
Add a Concurrent Job 83
Record a Department Change 97
Record a Leave of Absence 105
Return from Leave of Absence 109
Record an Employee Promotion 111
Record a Pay Rate Change 117
Record an Employee Termination 121
Record an Employee Rehire 123
View Job Summary Information 126

Workforce Administration 9.1 - HCSD

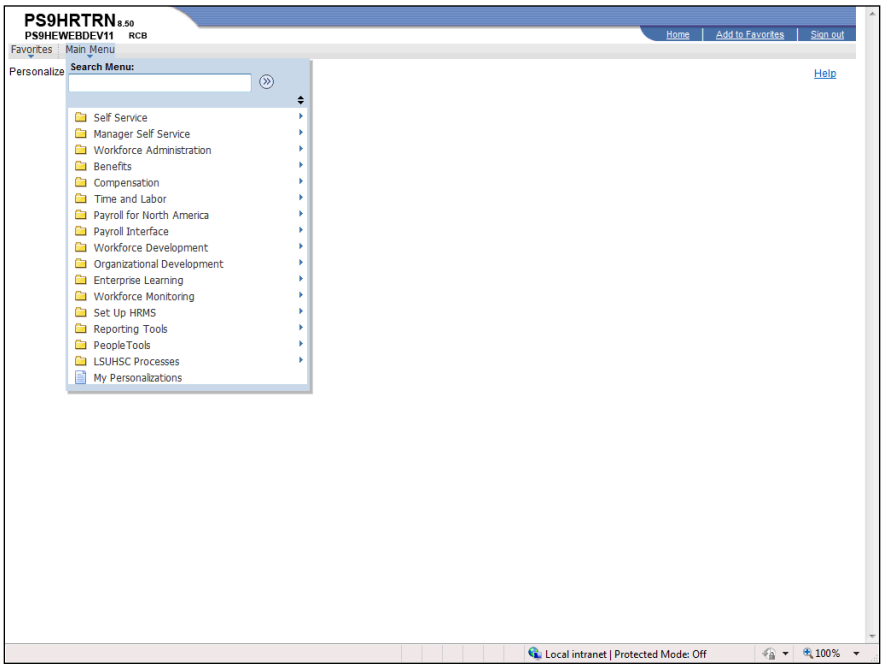
Manage Positions

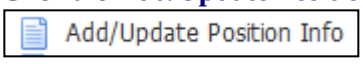
Create a Position

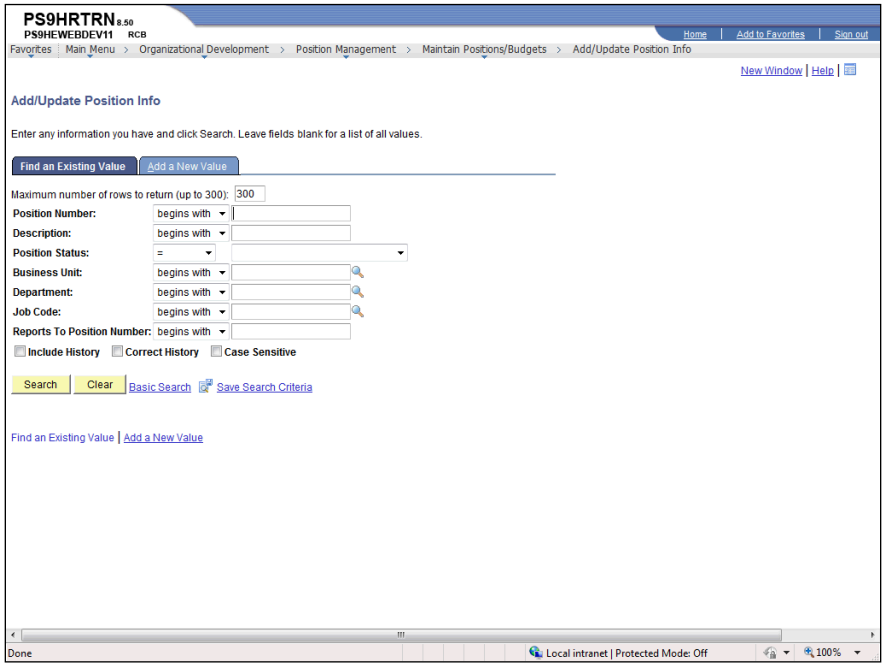
Procedure

In this topic you will learn how to **Create a Position**.

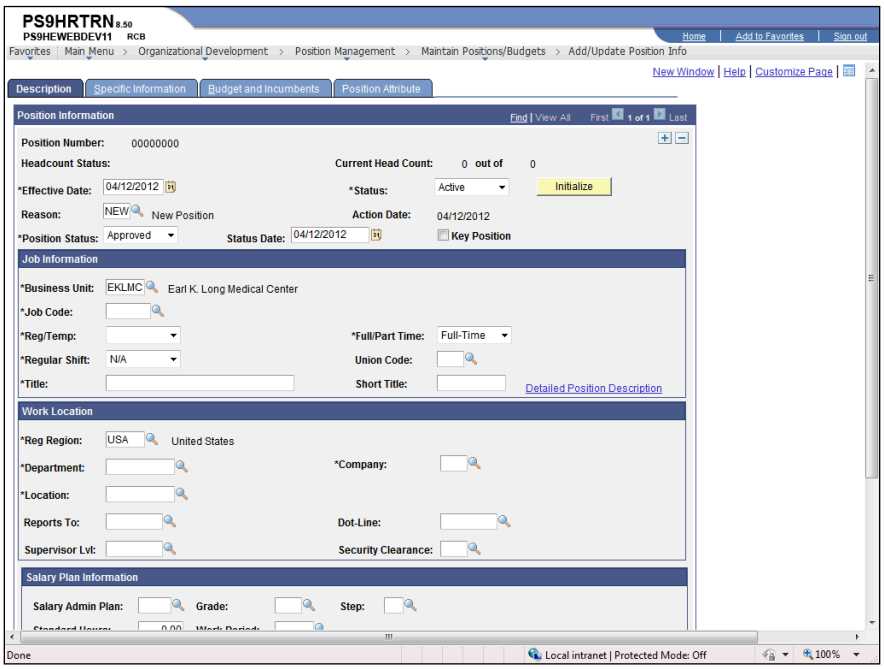
Step	Action
1.	Click the **Main Menu** link.

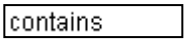


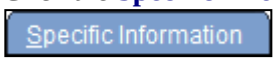
Step	Action
2.	Point to the **Organizational Development** menu.
3.	Point to the **Position Management** menu.
4.	Point to the **Maintain Positions/Budgets** menu.
5.	Click the **Add/Update Position Info** menu. 

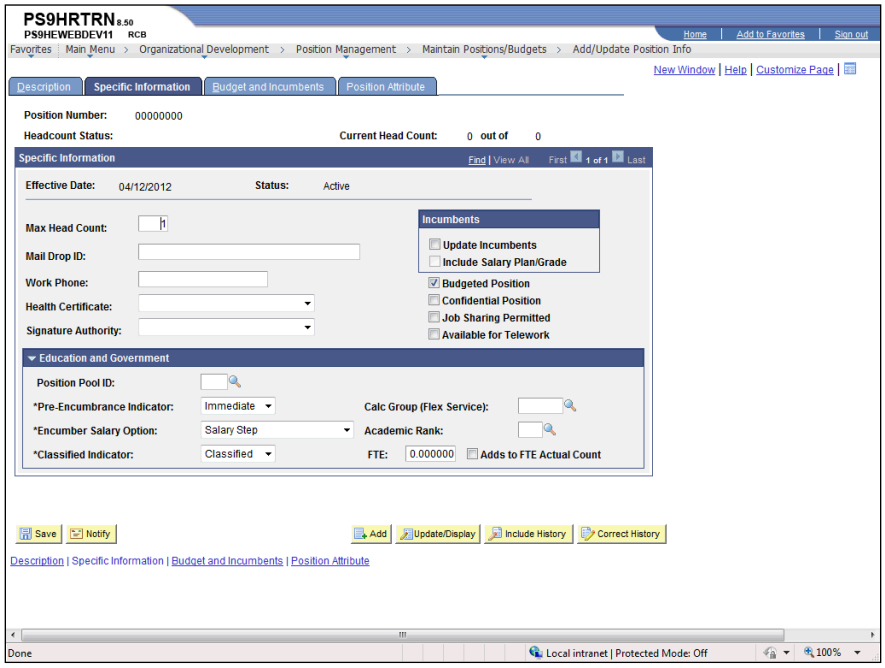


Step	Action
6.	Click the **Add a New Value** tab.
7.	Click the **Add** button.

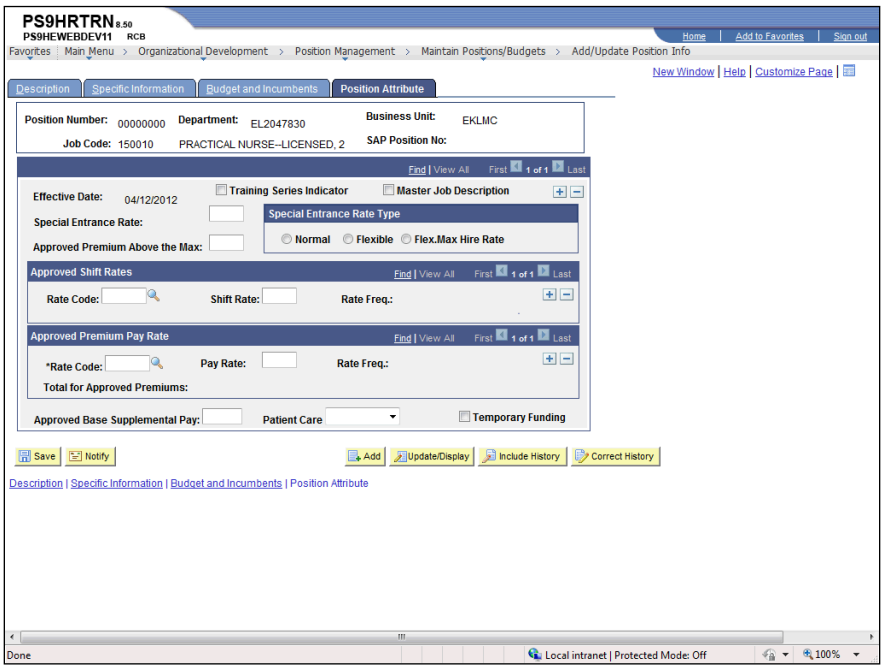


Step	Action
8.	Enter the desired information into the **Job Code** field. Enter "**150010**".
9.	***NOTE: If you know the Department number you can enter directly into the field. Otherwise you may search for it using the Look up Department option.*** Click the **Look up Department** button.
10.	Click the button to the right of the **Department** field.
11.	Click the **contains** list item. 
12.	Enter the desired information into the **Department** field. Enter "**EL20478**".
13.	Click the **Look Up** button.
14.	Click the **Infectious Disease Clinic** link in the Search Results list.
15.	Click the **Look up Location** button.
16.	Click the **EKLMC** link in the Search Results list.

Step	Action
17.	Click the **Specific Information** tab. 
18.	***NOTE: The Classified Indicator field defaults as "Classified". This option will need to be changed if the position is Unclassified.***



Step	Action
19.	Enter the desired information into the **FTE (Full Time Equivalent)** field. Enter "**1**".
20.	Click the **Adds to FTE Actual Count** option.
21.	Click the **Position Attributes** tab.



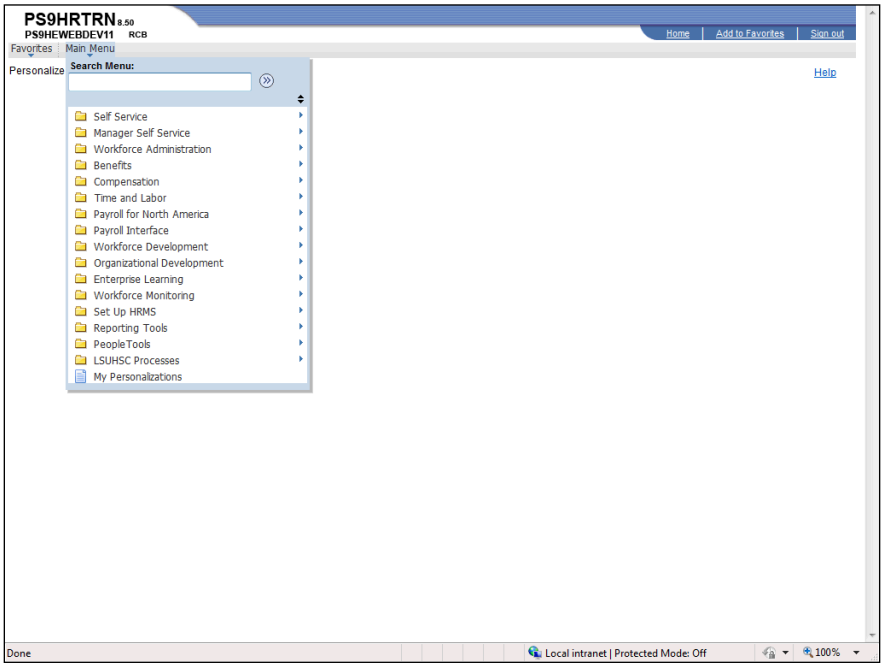
Step	Action
22.	Click the **Training Series Indicator** option. Training Series Indicator
23.	Click the **Save** button. Save
24.	Once saved a new Position Number is assigned and changes from 00000000 to **00049724**.
25.	This completes **Create a Position**. **End of Procedure.**

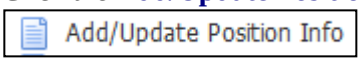
Update Position Data

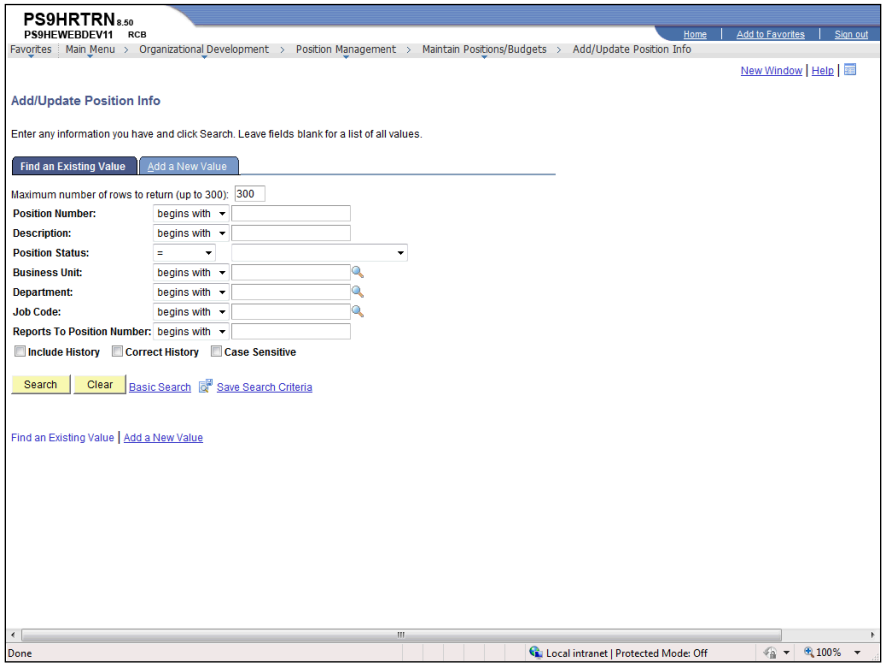
Procedure

In this topic you will learn how to **Update Position Data**.

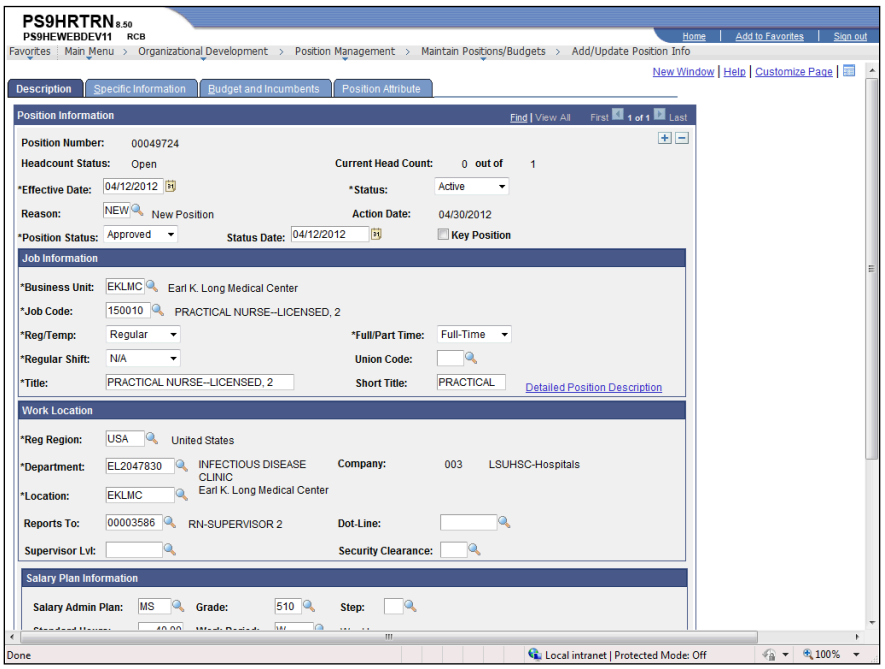
Step	Action
1.	Click the **Main Menu** button.

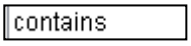


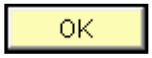
Step	Action
2.	Point to the **Organizational Development** menu.
3.	Point to the **Position Management** menu.
4.	Point to the **Maintain Positions/Budgets** menu.
5.	Click the **Add/Update Position Info** menu. 



Step	Action
6.	Enter the desired information into the **Position Number** field. Enter "**00049724**".
7.	Click the **Search** button. Search



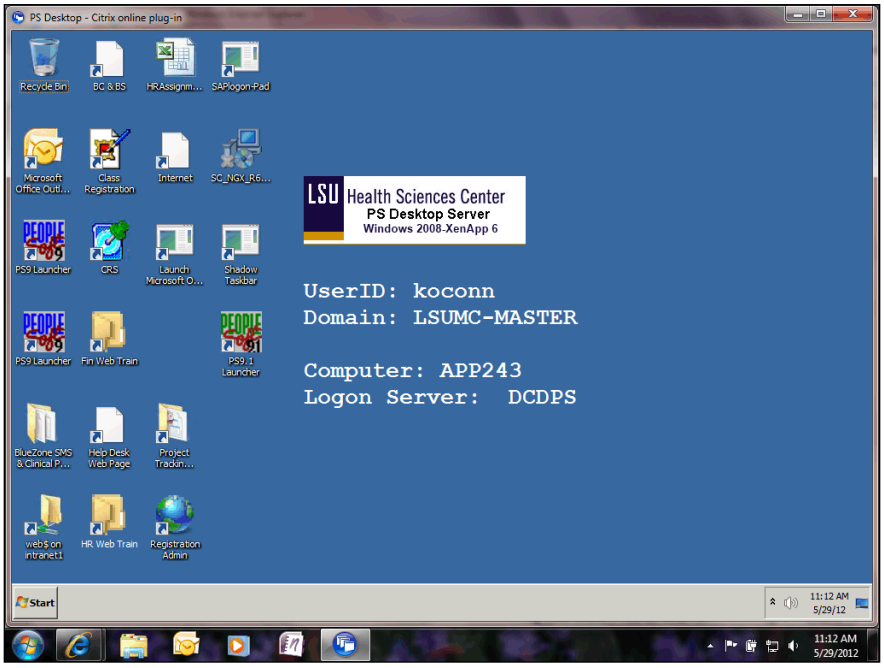
Step	Action
8.	Click the **Add a new row at row 1** button.
9.	Click the **Look up Reason** button.
10.	Enter the desired information into the **Reason Code** field. Enter "**R**".
11.	Click the **Look Up** button.
12.	Click the **REA - Reassignment** link.
13.	***NOTE: If you know the Department number you can enter directly into the field. Otherwise you may search for it using the Look up Department option.*** Click the **Look up Department** button.
14.	Click the button to the right of the **Department** field.
15.	Click the **contains** list item. 
16.	Enter the desired information into the **Department** field. Enter "**EL20478**".

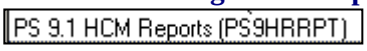
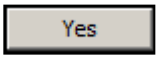
Step	Action
17.	Click the **Look Up** button.
18.	Click the **EL2047810 - Neurology Clinic** link.
19.	Click the **Look up Location** button.
20.	Click the **EKLMC** link in the Search Results list.
21.	Click the **Save** button.
22.	Click the **OK** button. 
23.	This completes **Update Position Data**. **End of Procedure.**

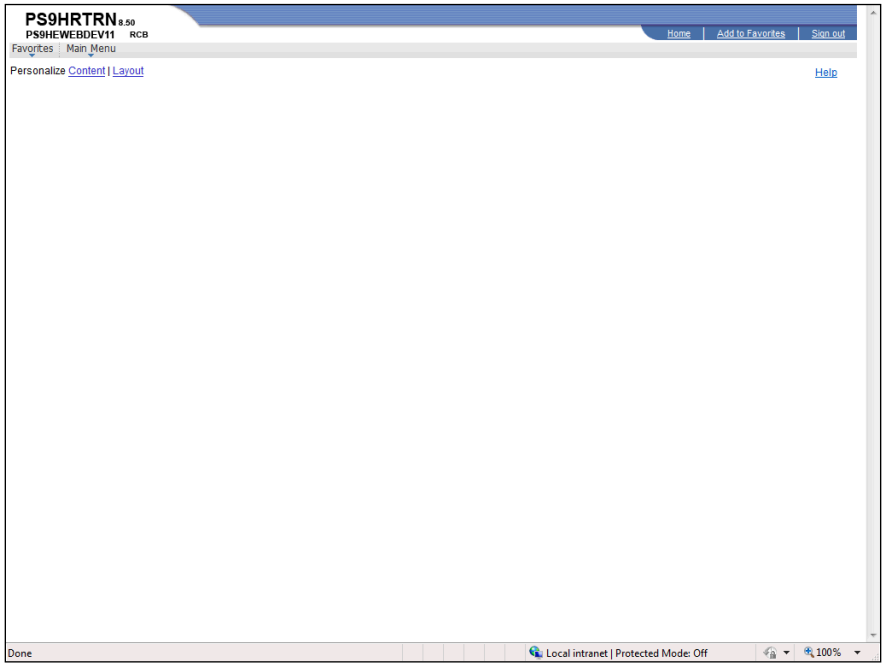
Run a Query

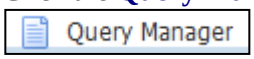
Procedure

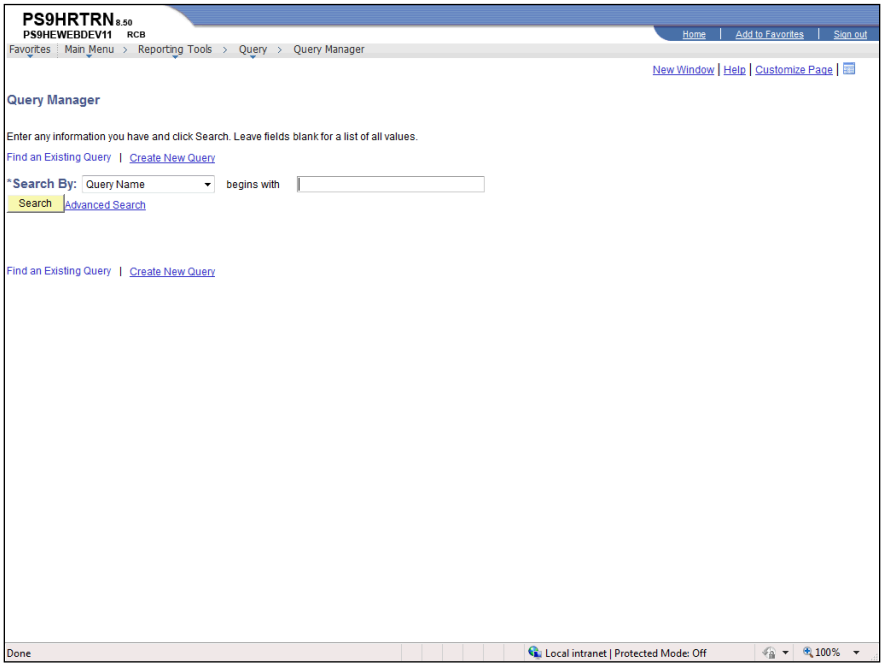
In this topic you will learn how to **Run a Query**.

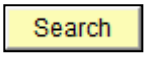


Step	Action
1.	Double-click the **PeopleSoft 9.1** button.
2.	From the LSUHSC PeopleSoft 9 Launcher, click the button to the right of the **Database** field.
3.	Click the **PS 9 Higher Ed Reports (PS9HERPT)** list item. 
4.	Click the **Start** button.
5.	A warning message displays reminding you that this is not the Production database. Click the **Yes** button. 
6.	***NOTE: The TRN database was used for recording this topic for training purposes only. All reports must be run in the Reports database.***



Step	Action
7.	Click the **Main Menu** button.
8.	Click the **Reporting Tools** link.
9.	Click the **Query** link.
10.	Click the **Query Manager** link. 



Step	Action
11.	Enter the desired information into the **begins with** field. Enter "**pos**".
12.	Click the **Search** button. 
13.	Click the checkbox to the left of the **POS007_Vacant_Budgeted_Position** option.
14.	Click the **HTML** link on the POS007_Vacant_Budgeted_Position row.

Step	Action
15.	Click the **Close** button.
16.	This completes **Run a Query**. **End of Procedure.**

Employment Actions

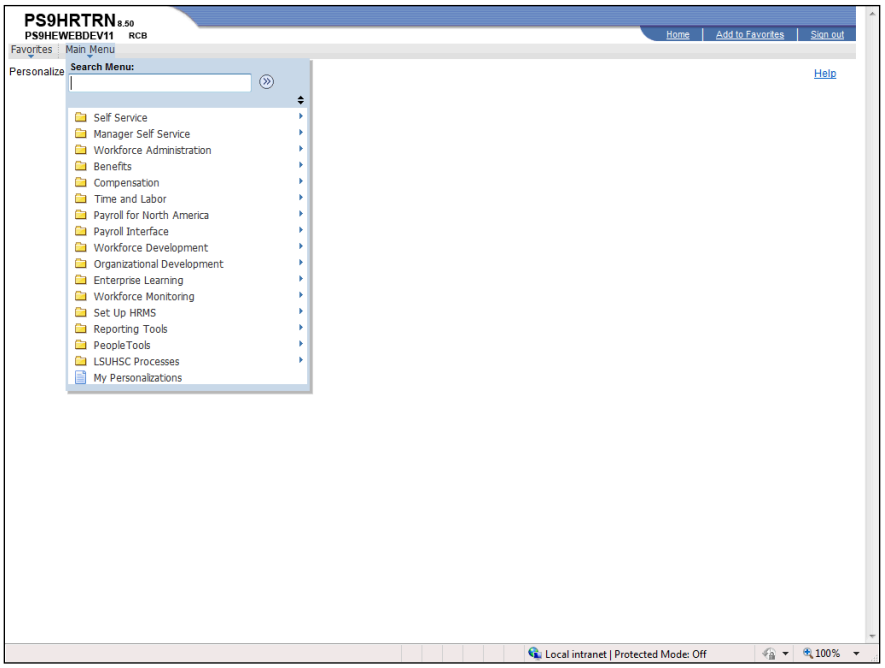
NOTE: The employees used as examples in the exercises for this manual are fictional characters. All information (e.g. ID numbers, SSN, address, compensation, etc.) relating to these employees is also fictional and created for training purposes only. Any similarity to a real person is coincidental.

Add a Person - Classified

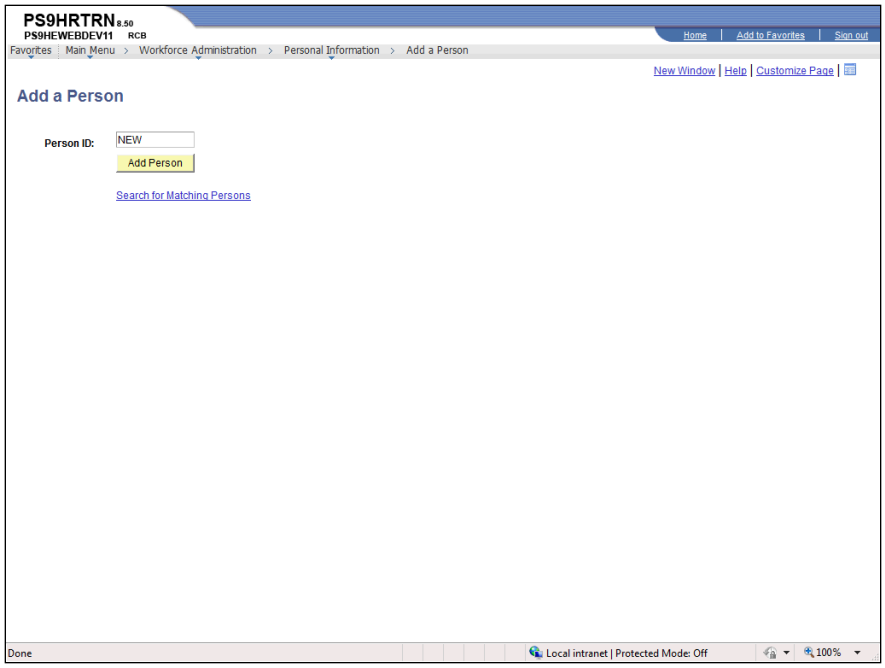
Procedure

In this topic you will learn how to **Add a Person - Classified**.

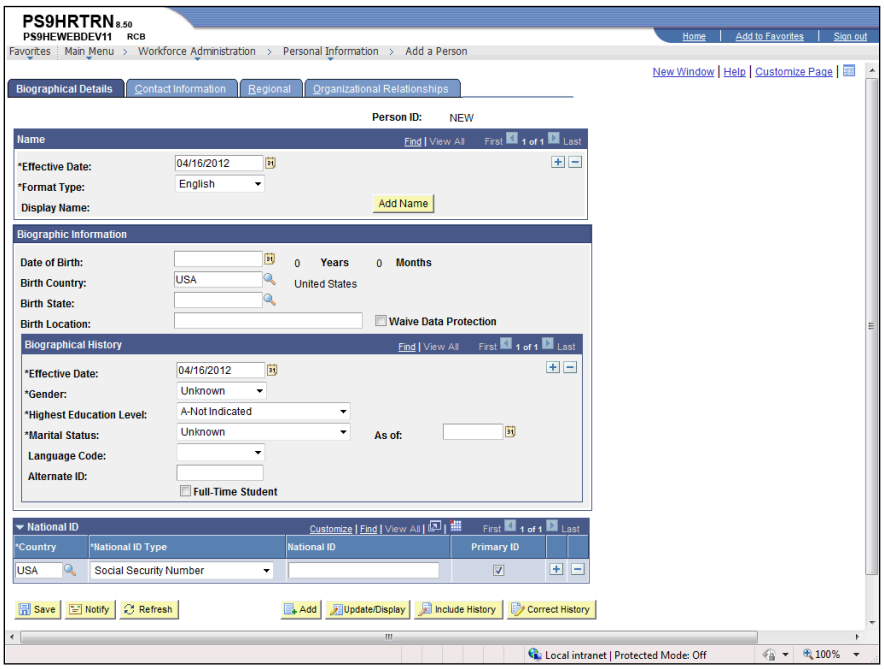
Step	Action
1.	Click the **Main Menu** button. Main Menu

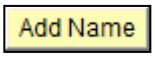


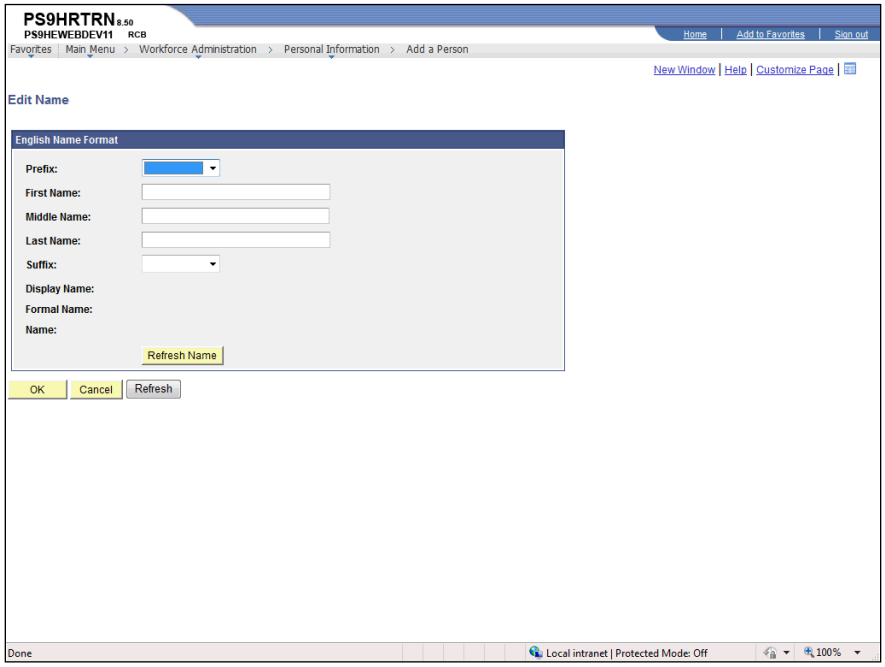
Step	Action
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Add a Person** menu. Add a Person

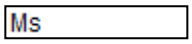
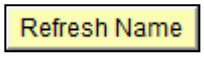
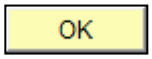


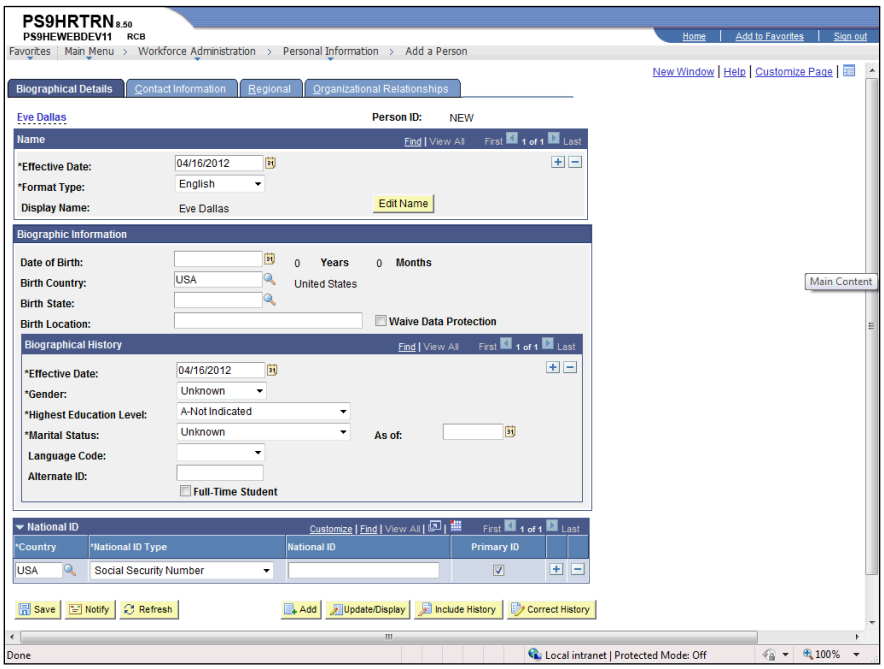
Step	Action
5.	Click the **Add Person** button. Add Person
6.	The Effective Date defaults to the current date. Depending on when you are entering the employee's information into the system, you may need to change the Effective Date. The **Effective Date** is the **employee's hire date**.

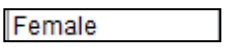
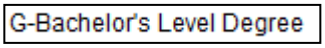


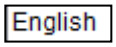
Step	Action
7.	Click the **Add Name** button. 

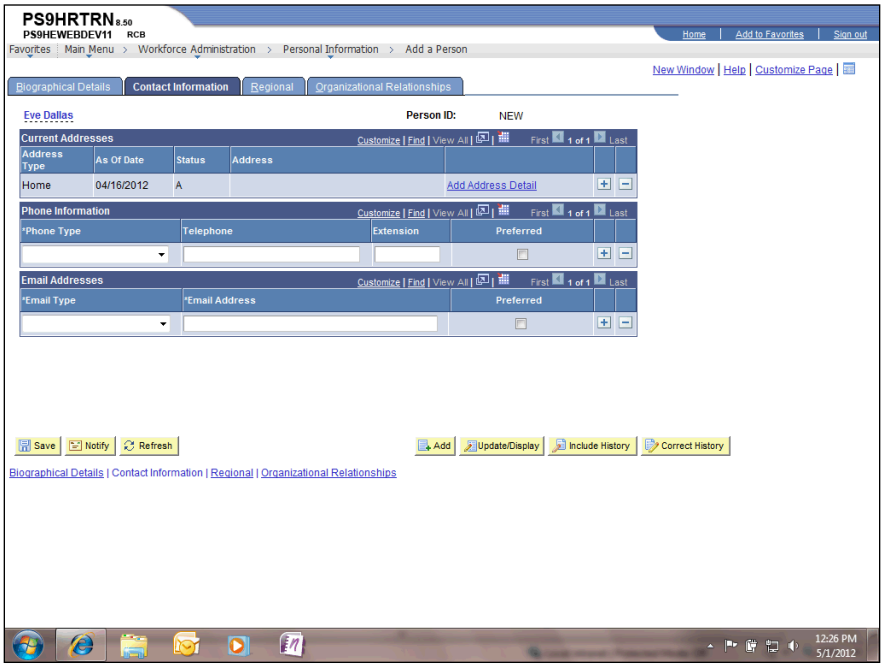


Step	Action
8.	Click the button to the right of the **Prefix** field.
9.	Click the **Ms** list item. 
10.	Enter the desired information into the **First Name** field. Enter "**Eve**".
11.	Enter the desired information into the **Last Name** field. Enter "**Dallas**".
12.	Click the **Refresh Name** button. 
13.	Click the **OK** button. 

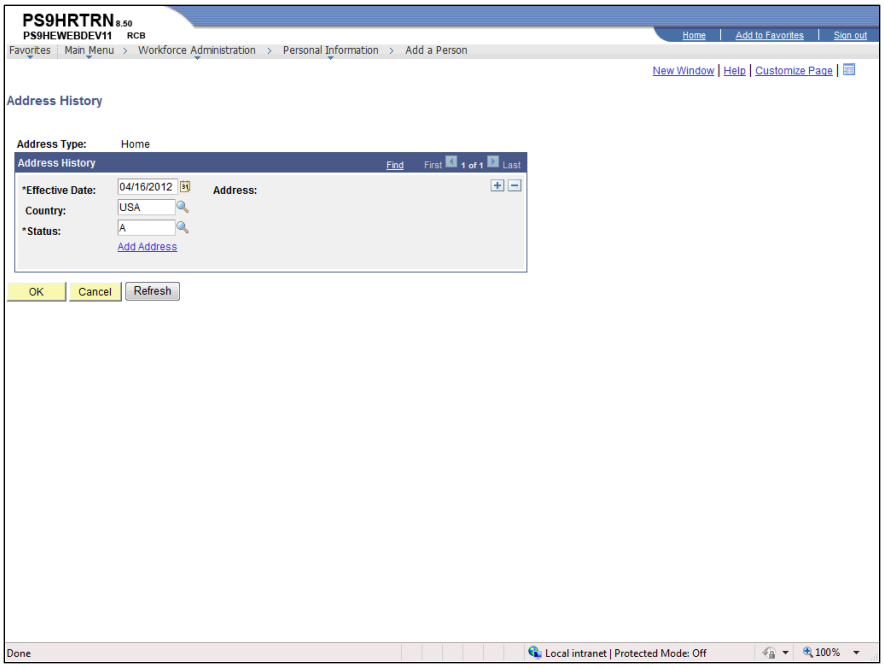


Step	Action
14.	Enter the desired information into the **Date of Birth** field. Enter "**080980**".
15.	Click the **Look up Birth State** button.
16.	Enter the desired information into the **State** field. Enter "**T**".
17.	Click the **Look Up** button.
18.	Click the **TX - Texas** link.
19.	Enter the desired information into the **Birth Location** field. Enter "**Dallas**".
20.	Click the button to the right of the **Gender** field.
21.	Click the **Female** list item. 
22.	Click the button to the right of the **Highest Education Level** field.
23.	Click the **G-Bachelor's Level Degree** list item. 

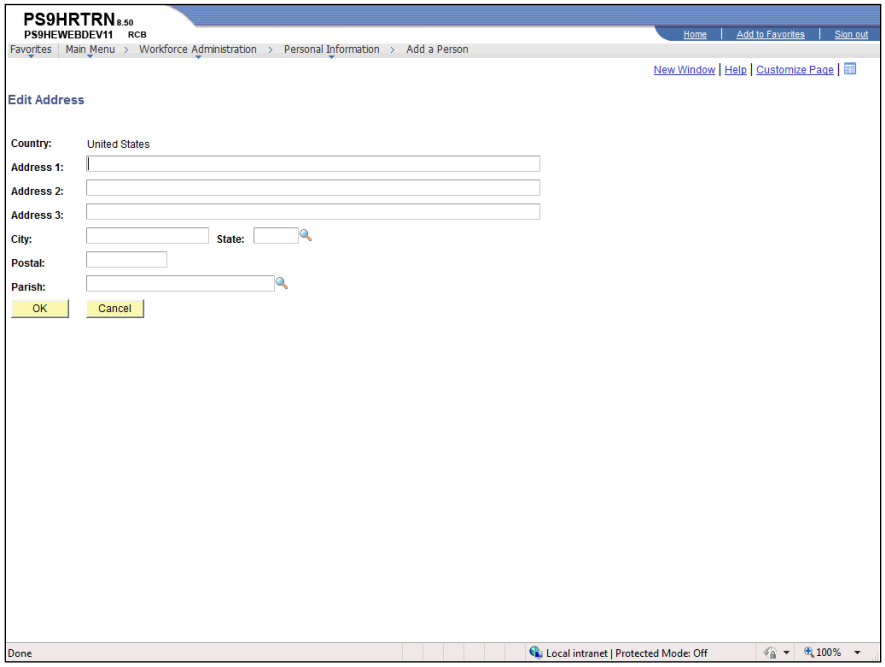
Step	Action
24.	Click the button to the right of the **Marital Status** field. ***NOTE: HCSD uses only the Single or Married option.***
25.	Click the **Married** list item.
26.	Click the button to the right of the **Language Code** field.
27.	Click the **English** list item. 
28.	Enter the desired information into the **National ID** field. Enter "**9 - digit Social Security Number**". ***NOTE: Verify that the Primary ID box to the right of the National ID field is checked.***
29.	Click the **Contact Information** tab.

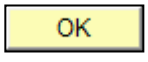


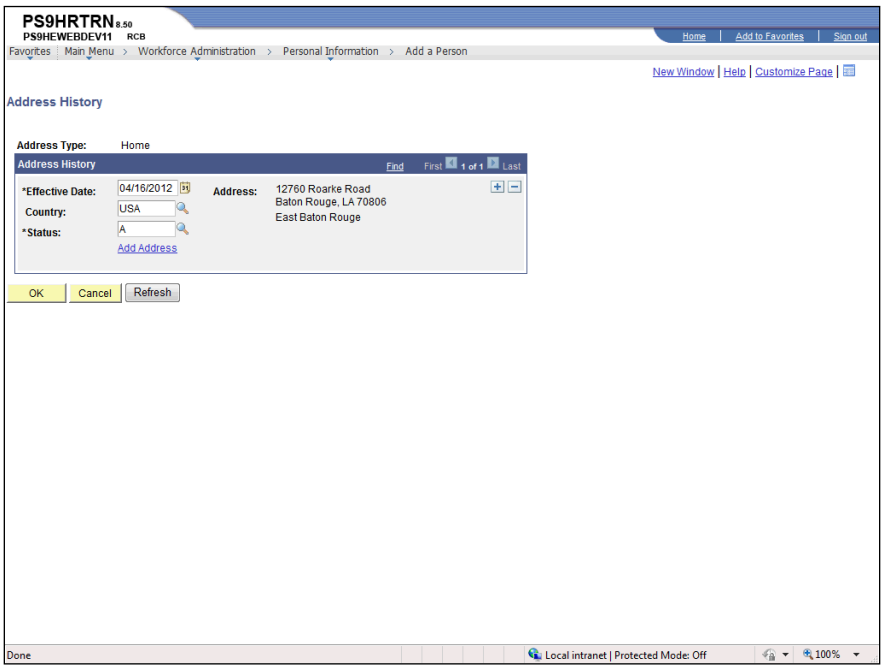
Step	Action
30.	Click the **Add Address Detail** link.

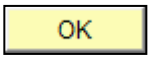


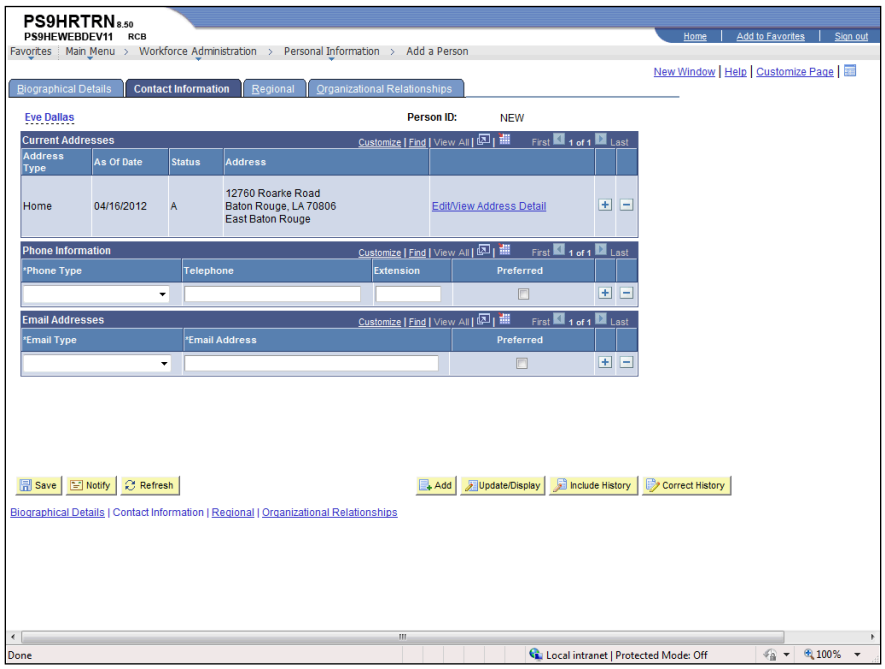
Step	Action
31.	Click the **Add Address** link. Add Address

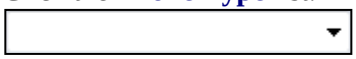
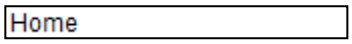
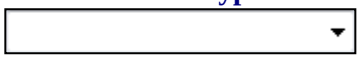
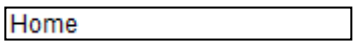
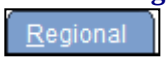


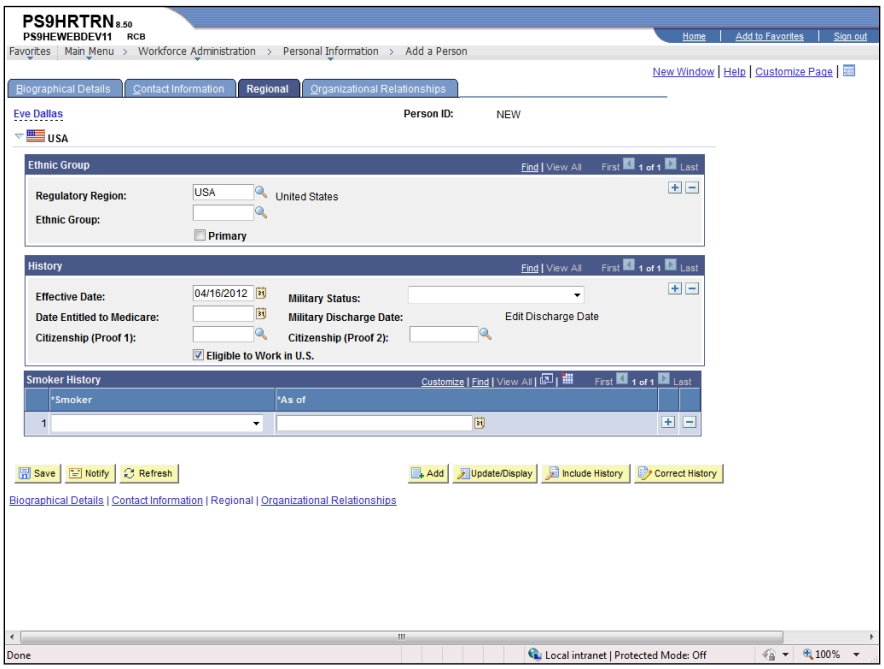
Step	Action
32.	Enter the desired information into the **Address 1** field. Enter "**12760 Roarke Road**". ***NOTE: The Address 1 field has a limited number of characters. Use the Address 2 field for apartment numbers, P. O. Box information, etc.***
33.	Enter the desired information into the **City** field. Enter "**Baton Rouge**".
34.	Enter the desired information into the **State** field. Enter "**LA**".
35.	Enter the desired information into the **Postal** field. Enter "**70806**".
36.	Click the **Look up Parish (Alt+5)** button.
37.	Enter the desired information into the **Description** field. Enter "**E**".
38.	Click the **Look Up** button.
39.	Click the **East Baton Rouge** link.
40.	Click the **OK** button. 

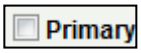
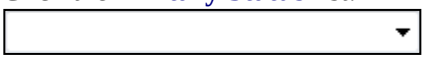
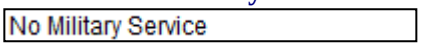
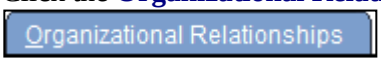


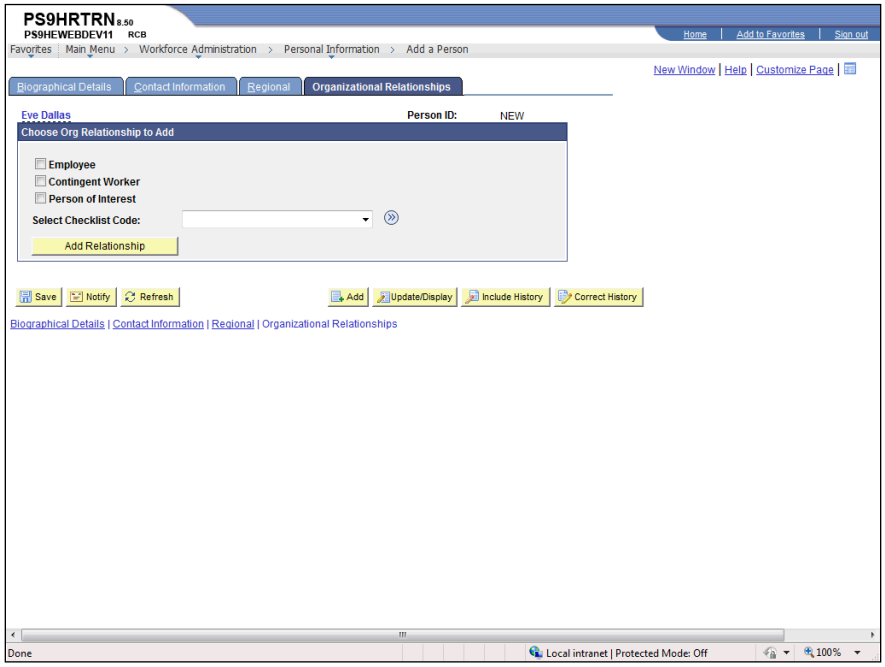
Step	Action
41.	Click the **OK** button. 

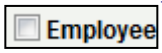
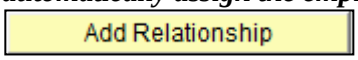


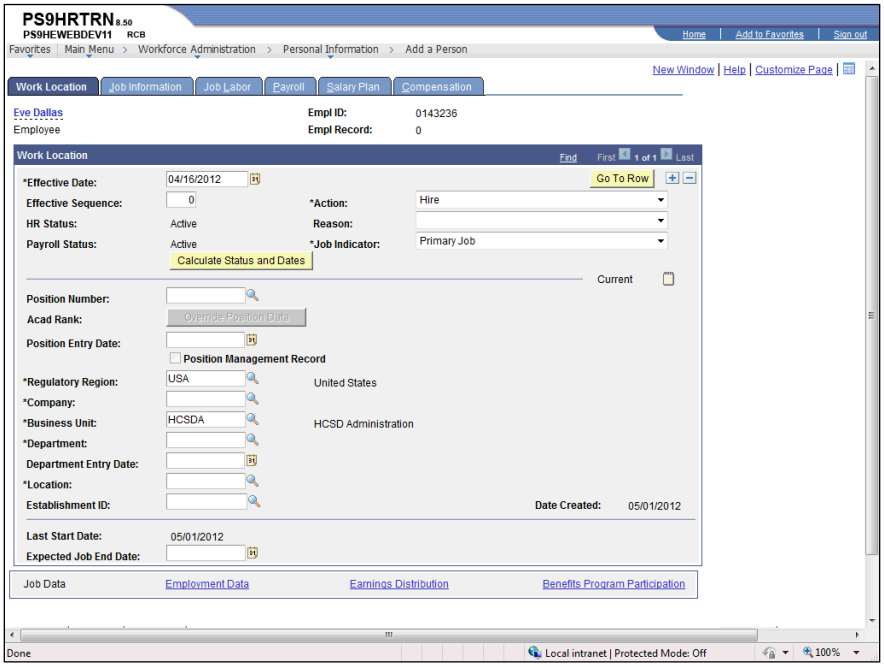
Step	Action
42.	Click the **Phone Type** list. 
43.	Click the **Home** list item. 
44.	Enter the desired information into the **Telephone** field. Enter "**2253430223**".
45.	Click the **Preferred** option.
46.	Click the **Email Type** list. 
47.	Click the **Home** list item. 
48.	Enter the desired information into the **Email Address** field. Enter "**topcop@yahoo.net**".
49.	Click the **Preferred** option.
50.	Click the **Regional** tab. 

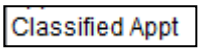
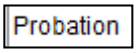
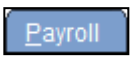


Step	Action
51.	Click the **Look up Ethnic Group (Alt+5)** button.
52.	Click the **HISPA** link.
53.	Click the **Primary** option. 
54.	Click the **Military Status** list. 
55.	Click the **No Military Service** list item. 
56.	Click the **Organizational Relationships** tab. 



Step	Action
57.	Click the **Employee** option. 
58.	Click the **Add Relationship** button. ***NOTE: Once you click the Add the Relationship button, the system will automatically assign the employee an ID number.*** 
59.	The employee's ID number displays at the top of the page. ***WARNING: Make sure you note the employee's ID number before continuing to the Job Data section. The employee ID number is with only means of locating the employee in the system until the Job Data and Benefits Program Participation sections are completed.***
60.	The Effective Date defaults to the current date. Depending on when you are entering the employee's information into the system, you may need to change the Effective Date. The **Effective Date** is the **employee's hire date**.

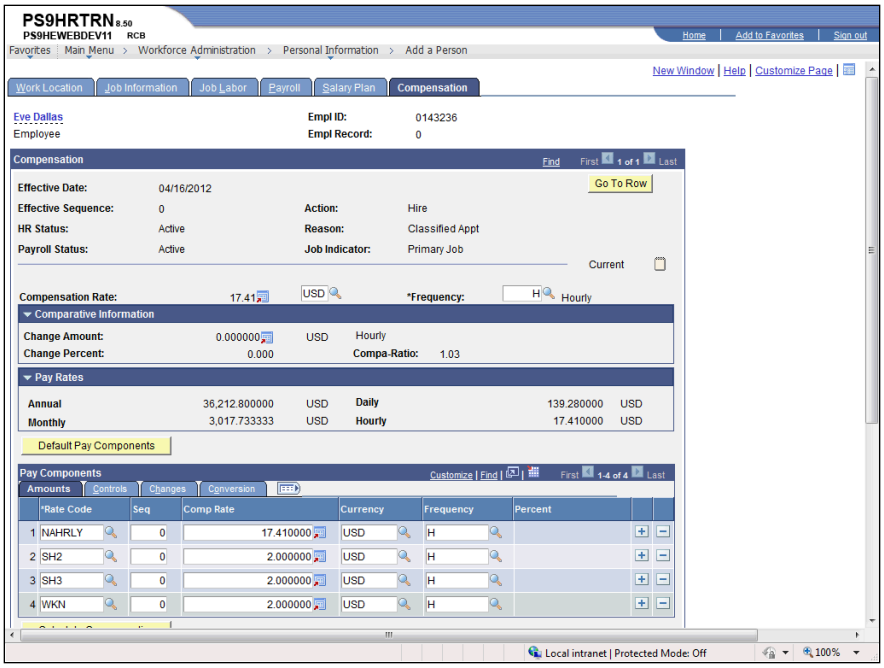


Step	Action
61.	Click the **Reason** list.
62.	Click the **Classified Appt** list item. 
63.	Enter the desired information into the **Position Number** field. Enter "**00049724**". ***NOTE: Once the Position Number is entered, the system will automatically populate the appropriate information into the remaining fields when you navigate away from the field.***
64.	Click the **Job Information** tab.
65.	Click the button to the right of the **Empl Class** field.
66.	Click the **Probation** list item. 
67.	The Work Day Hours field defaults based on the employee's FTE.
68.	Click the **Payroll** tab. 
69.	Click the **Look up Pay Group** button.

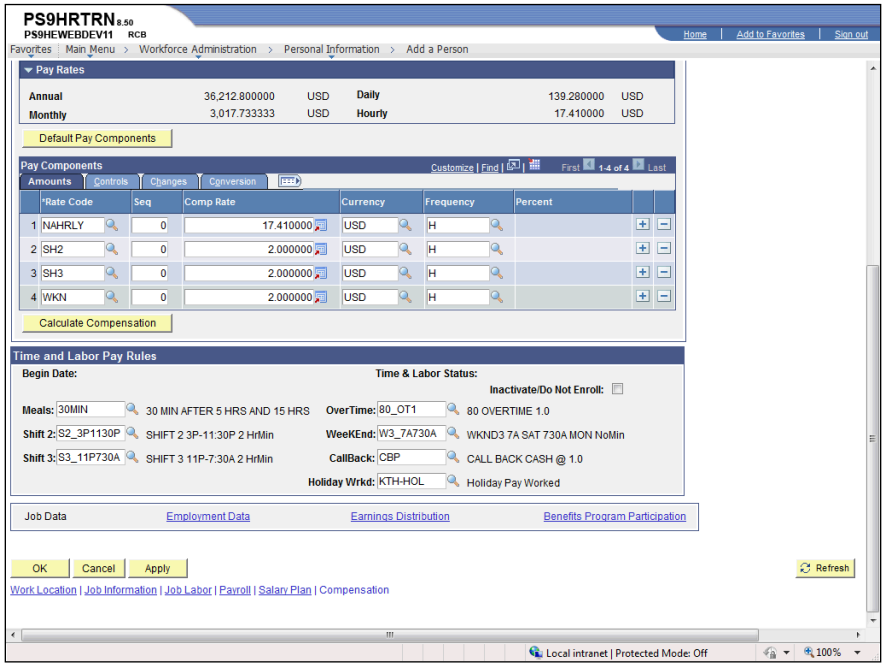
Step	Action
70.	Click the **EBN - Non-exempt w/ benefit(EKL)** link.
71.	Click the **Look up Tax Location Code** button.
72.	Click the **Louisiana** link.
73.	Click the **Look up Holiday Schedule** button.
74.	Click the **HCS - HEALTH CARE SRVS DIV** link.
75.	Click the **Compensation** tab and then scroll to the bottom of the page.
76.	Click the **Look up Meals** button.
77.	Click the **30 MIN** link.
78.	Click the **Look up Shift 2** button.
79.	Click the **SHIFT 2 3P-11:30P 2 HrMin** link.
80.	Click the **Look up Shift 3** button.
81.	Click the **SHIFT 3 11P-7:30A 2 HrMin** link.
82.	Click the **Look up OverTime** button.
83.	Click the **80_OT1** link.
84.	Click the **Look up WeeKEnd** button.
85.	Click the **WKND3 7A SAT 730A MON NoMin** link.

Step	Action
86.	Click the **Look up CallBack** button.
87.	Click the **CALL BACK CASH @ 1.0** link.
88.	Click the **Look up Holiday Wrkd** button.
89.	Click the **Holiday Pay Worked** link.
90.	Click the **Look up Rate Code** button.
91.	Enter the desired information into the **Comp Rate Code** field. Enter "**N**".
92.	Click the **Look Up** button.
93.	Click the **NAHRLY - Default NA Hourly** link.
94.	Enter the desired information into the **Comp Rate** field. Enter "**17.41**".
95.	Click the **Add a new row at row 1** button.
96.	Click the **Look up Rate Code** button.
97.	Enter the desired information into the **Comp Rate Code** field. Enter "**S**".
98.	Click the **Look Up** button.
99.	Click the **SH2 - Shift 2 Differential** link.
100.	Enter the desired information into the **Comp Rate** field. Enter "**2.00**".
101.	Click the **Add a new row at row 2** button.
102.	Click the **Look up Rate Code** button.
103.	Enter the desired information into the **Comp Rate Code** field. Enter "**S**".

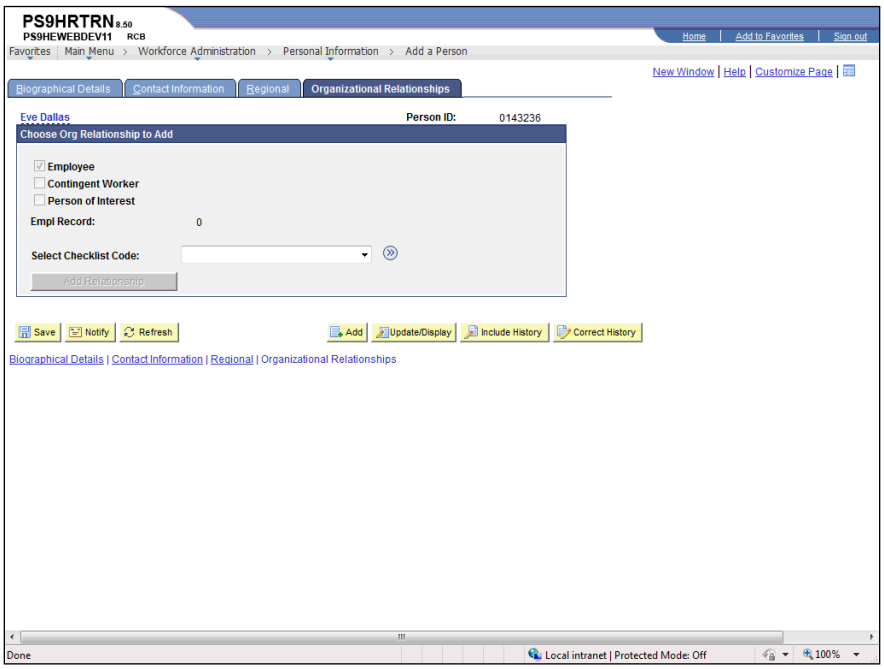
Step	Action
104.	Click the **Look Up** button.
105.	Click the **SH3 - Shift 3 Differential** link.
106.	Enter the desired information into the **Comp Rate** field. Enter "**2.00**".
107.	Click the **Add a new row at row 3** button.
108.	Click the **Look up Rate Code** button.
109.	Enter the desired information into the **Comp Rate Code** field. Enter "**W**".
110.	Click the **Look Up** button.
111.	Click the **WKN - Weekend Rate** link.
112.	Enter the desired information into the **Comp Rate** field. Enter "**2.00**".
113.	Click the **Calculate Compensation** button.



Step	Action
114.	The system calculates the employee's annual and monthly rate of pay. Click the **Down** button of the scrollbar.



Step	Action
115.	Click the **Benefits Program Participation** link. Benefits Program Participation
116.	***NOTE: The Effective Date defaults to the current date. Depending on when you are entering the employee's information into the system, you may need to change the Effective Date. The Effective Date is the employee's hire date.*** In this example the hire date and effective date are the same so the date does not need to be adjusted.
117.	Click the **Look up Benefit Program** button.
118.	Click the **FTP - Full/Temp/Part-time** link. FTP 12/01/2011 Full/Temp/Part-time
119.	Click the **OK** button. OK
120.	Click the **OK** button. OK
121.	Click the **OK** button. OK



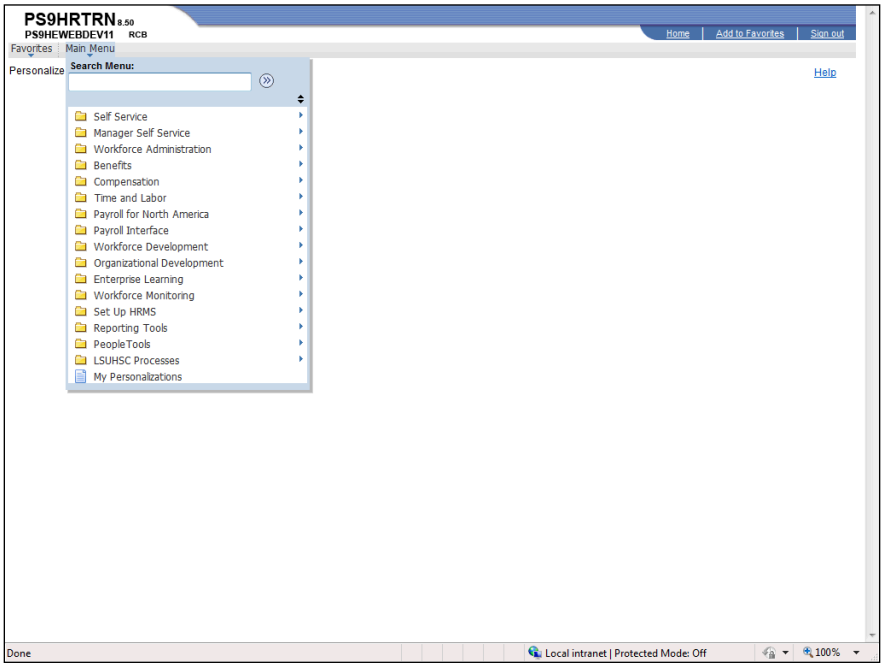
Step	Action
122.	Click the **Save** button. Save
123.	This completes **Add a Person - Classified**. **End of Procedure.**

Add a Person - Unclassified

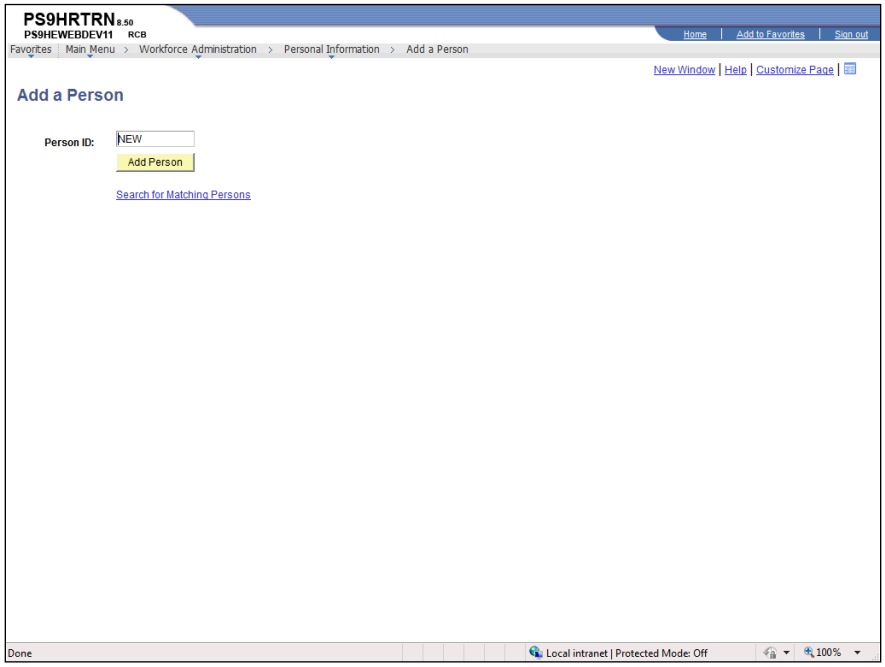
Procedure

In this topic you will learn how to **Add a Person - Unclassified**.

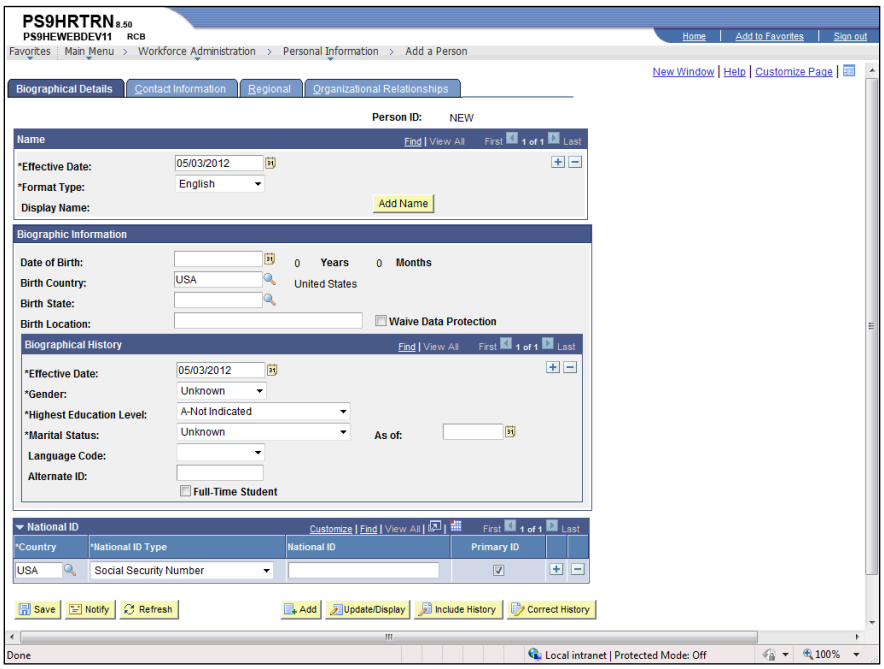
Step	Action
1.	Click the **Main Menu** button.

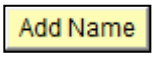


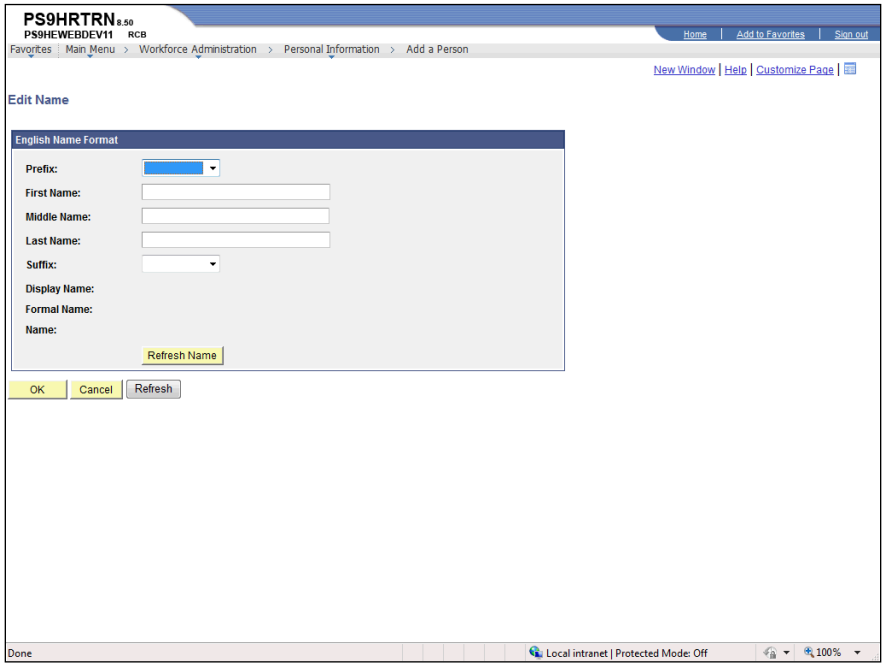
Step	Action
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.

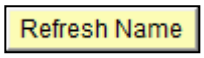
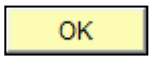


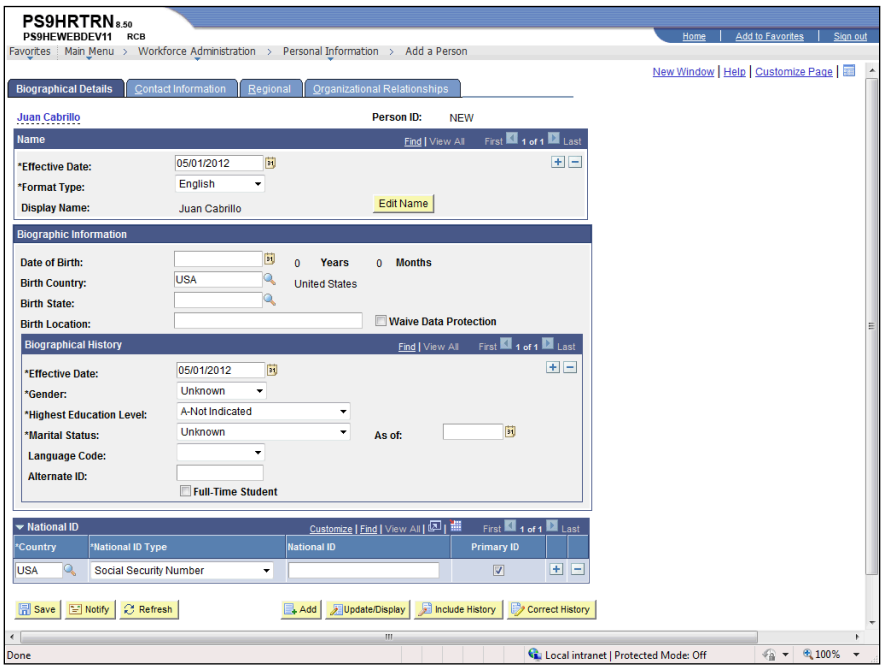
Step	Action
4.	Click the **Add the Person** link. Add Person
5.	***NOTE: The Effective Date defaults as the current date. Depending on when you are entering the employee's information, you may need to change the Effective Date. The Effective Date is the employee's hire date.***

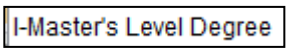
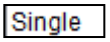


Step	Action
6.	In this example the employee's hire date is 05/01/2012, so the Effective Date must be changed. Click the **Choose a date** button.
7.	Click the desired date.
8.	Click the **Add Name** link. 

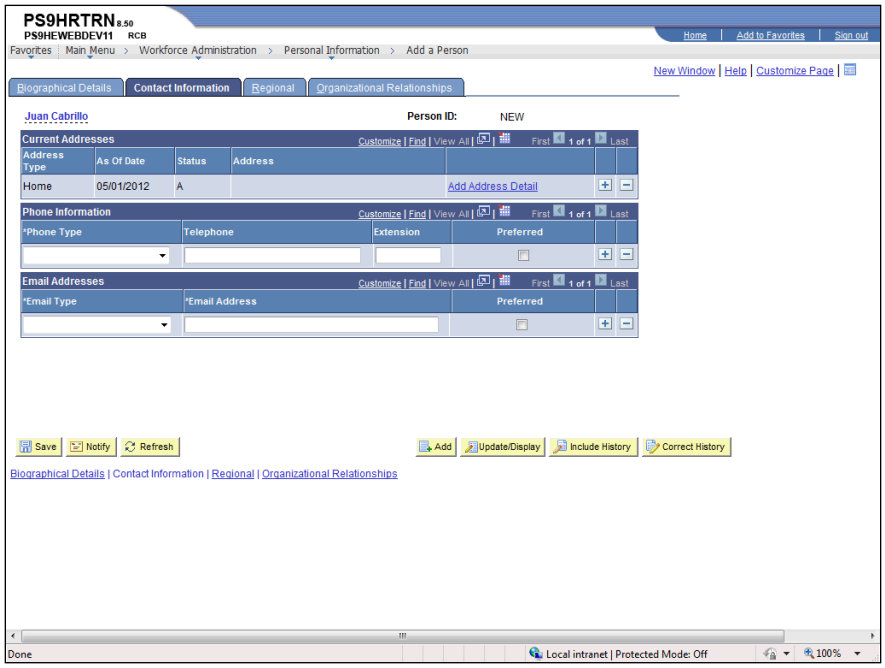


Step	Action
9.	Click the button to the right of the **Prefix** field.
10.	Click the **Mr** list item.
11.	Enter the desired information into the **First Name** field. Enter "**Juan**".
12.	Enter the desired information into the **Last Name** field. Enter "**Cabrillo**".
13.	Click the **Refresh Name** button. 
14.	Click the **OK** button. 

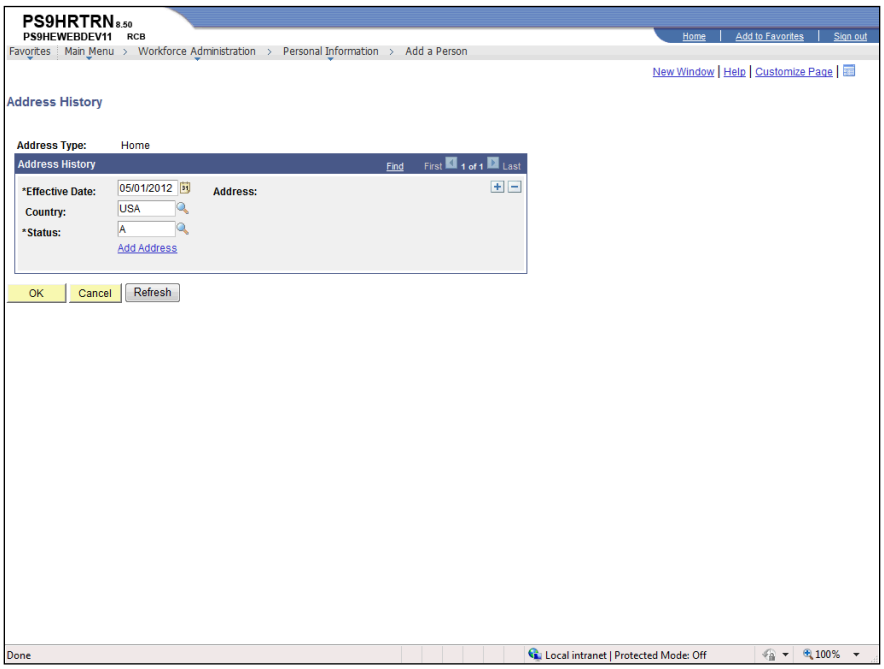


Step	Action
15.	Enter the desired information into the **Date of Birth** field. Enter "**111783**".
16.	Enter the desired information into the **Birth State** field. Enter "**LA**".
17.	Enter the desired information into the **Birth Location** field. Enter "**Baton Rouge**".
18.	Click the button to the right of the **Gender** field.
19.	Click the **Male** list item.
20.	Click the button to the right of the **Highest Education Level** field.
21.	Click the **I-Master's Level Degree** list item. 
22.	Click the button to the right of the **Marital Status** field. ***NOTE: HCSD uses only the Single or Married option.***
23.	Click the **Single** list item. 
24.	Click the button to the right of the **Language Code** field.

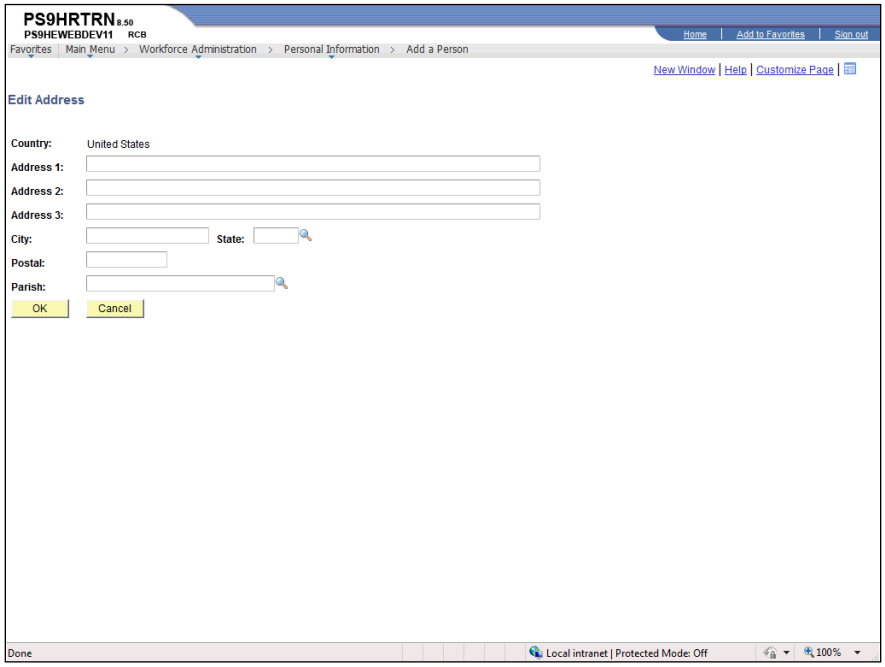
Step	Action
25.	Click the **English** list item. English
26.	Enter the desired information into the **National ID** field. Enter "**9 - digit Social Security Number**".
27.	Click the **Contact Information** tab. Contact Information



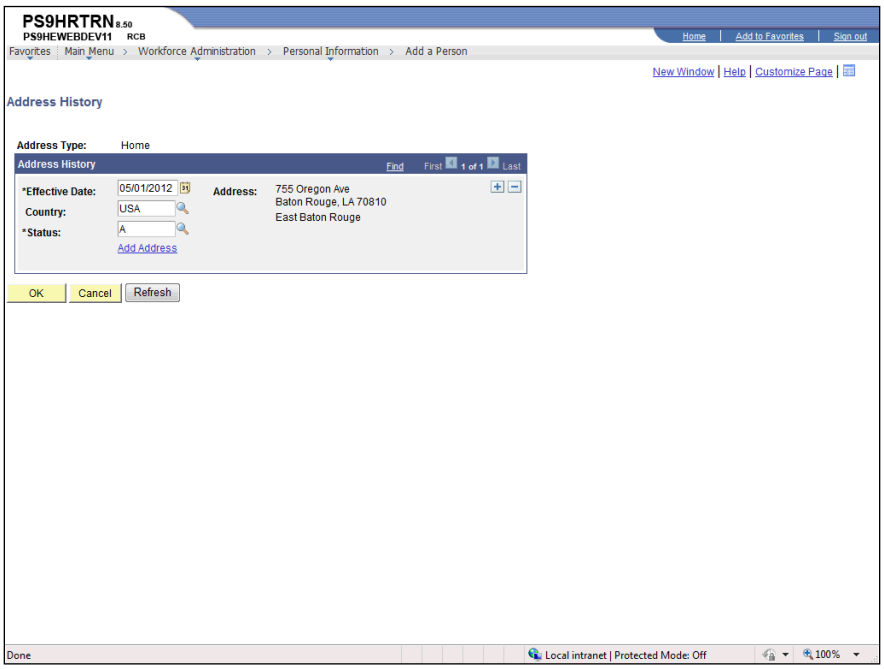
Step	Action
28.	Click the **Add Address Detail** link. Add Address Detail

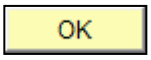


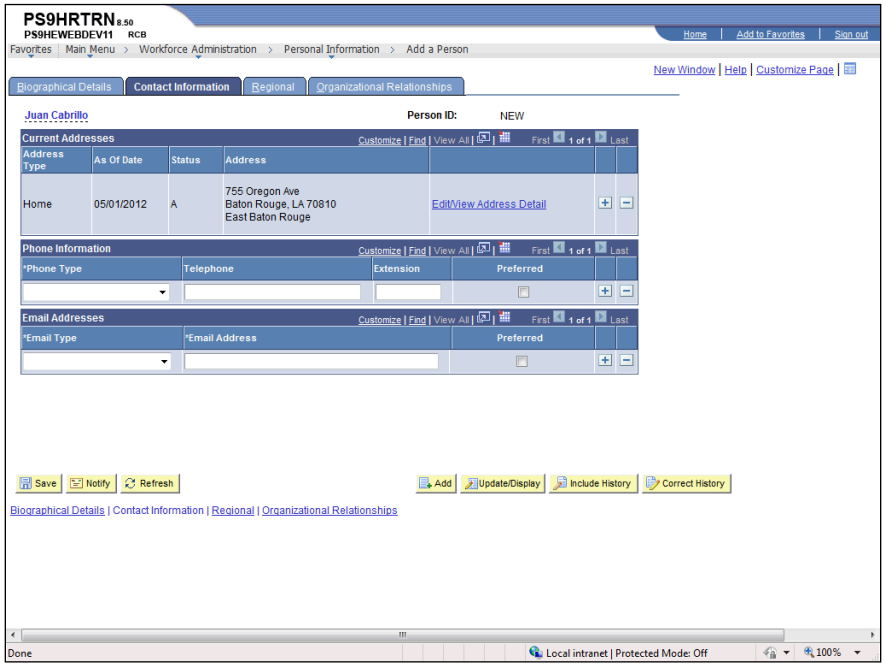
Step	Action
29.	Click the **Add Address** link. Add Address

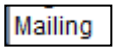


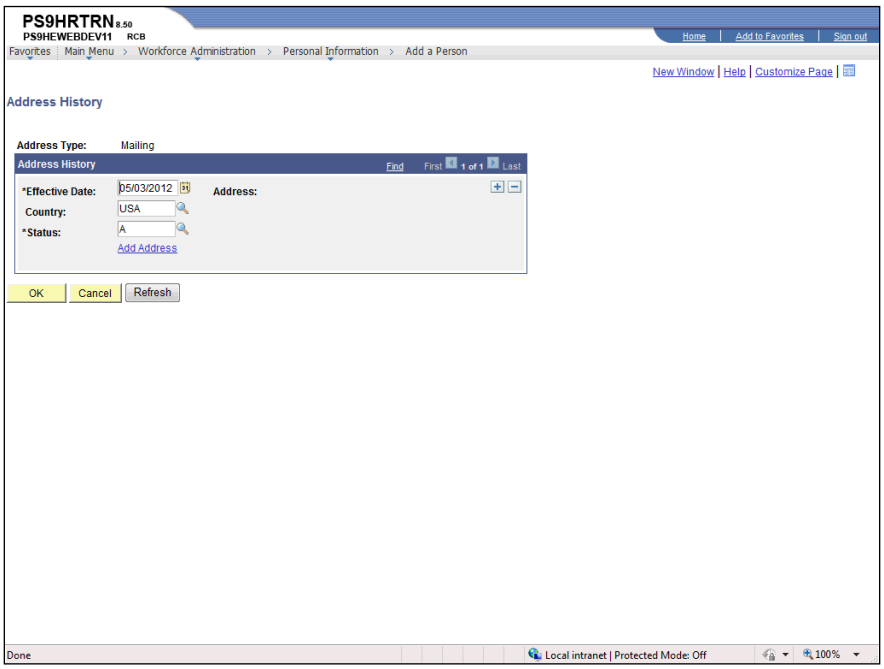
Step	Action
30.	Enter the desired information into the **Address 1** field. Enter "**755 Oregon Ave**". ***NOTE: The Address 1 field has a limited number of characters. Use the Address 2 field for apartment numbers, P.O. Box numbers, etc.***
31.	Ore Enter the desired information into the **City** field. Enter "**Baton Rouge**".
32.	Enter the desired information into the **State** field. Enter "**LA**".
33.	Enter the desired information into the **Postal** field. Enter "**70810**".
34.	Enter the desired information into the **Parish** field. Enter "**East Baton Rouge**".
35.	Click the **OK** button. OK



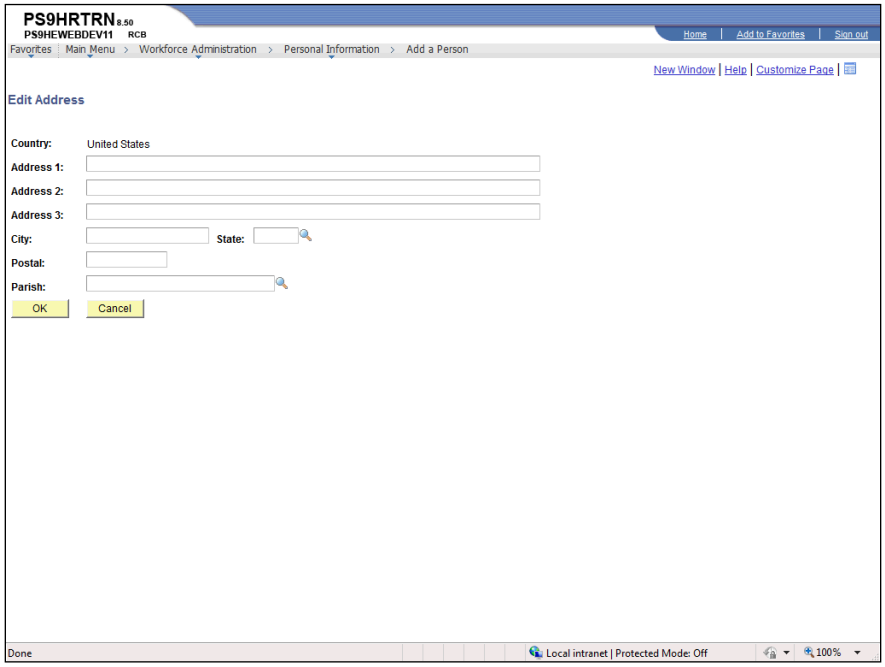
Step	Action
36.	Click the **OK** button. 



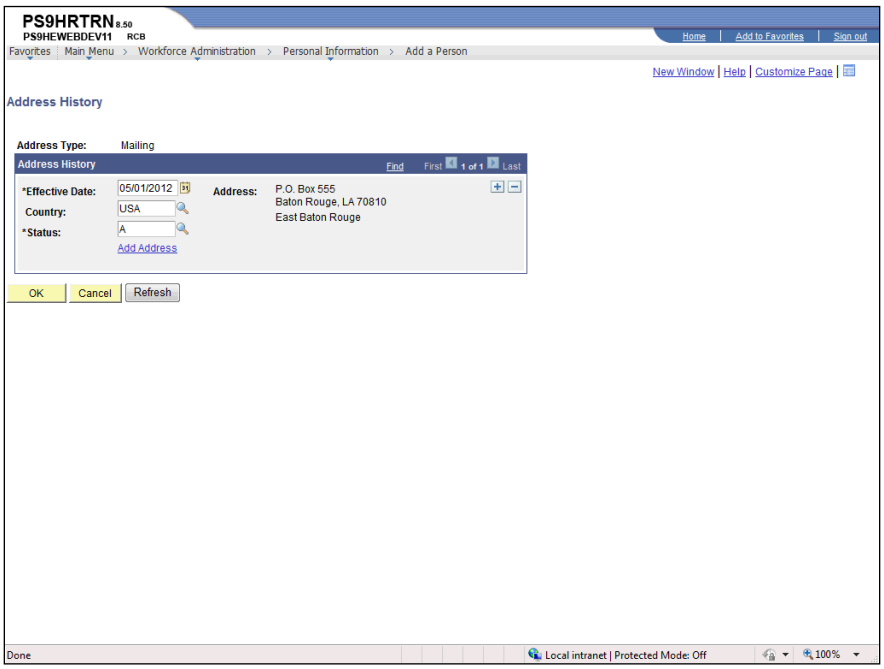
Step	Action
37.	Click the **Add a new row at row 1** button.
38.	Click the button to the right of the **Address Type** field.
39.	Click the **Mailing** list item. 
40.	Click the **Add Address Detail** link.



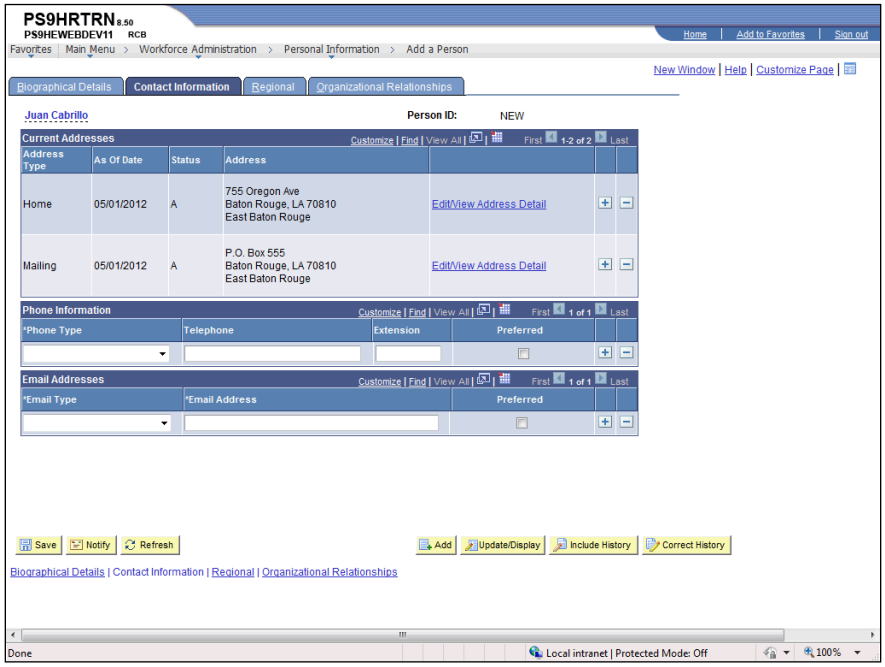
Step	Action
41.	In this example the Effective Date is the employee's hire date. Click the **Choose a date** button.
42.	Click the desired date.
43.	Click the **Add Address** link.



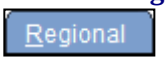
Step	Action
44.	Enter the desired information into the **Address 1** field. Enter "**P.O. Box 555**".
45.	Enter the desired information into the **City** field. Enter "**Baton Rouge**".
46.	Enter the desired information into the **State** field. Enter "**LA**".
47.	Enter the desired information into the **Postal** field. Enter "**70810**".
48.	Enter the desired information into the **Parish** field. Enter "**East Baton Rouge**".
49.	Click the **OK** button. OK

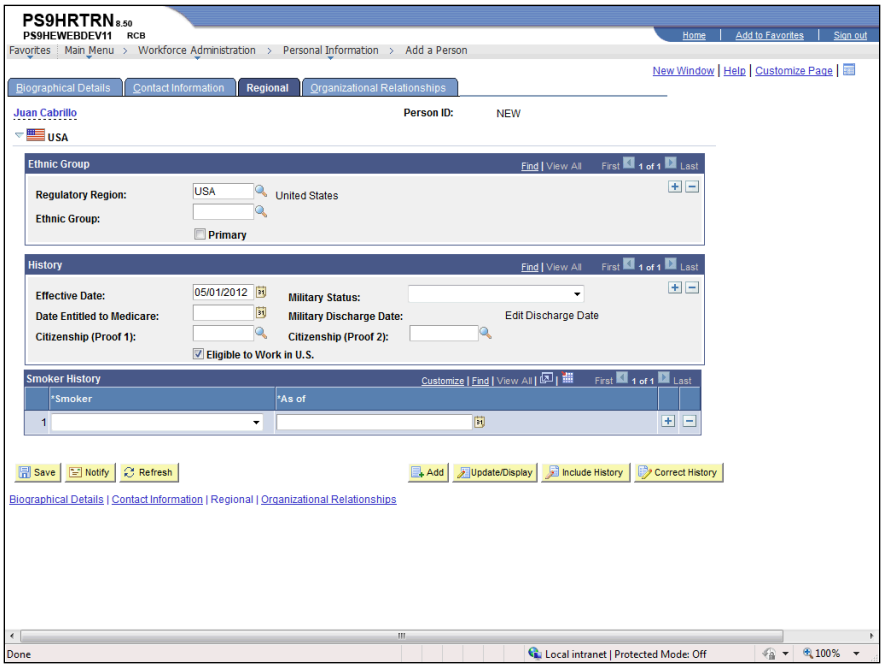


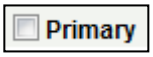
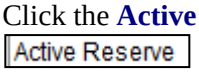
Step	Action
50.	Click the **OK** button. OK

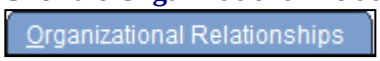


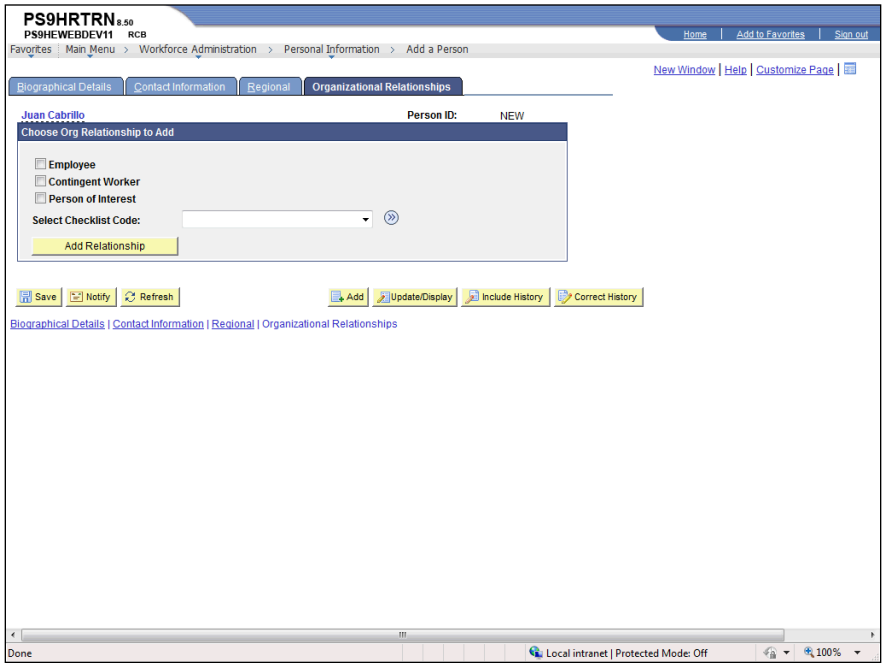
Step	Action
51.	Click the button to the right of the **Phone Type** field.
52.	Click the **Home** list item. Home
53.	Enter the desired information into the **Telephone** field. Enter "**2259294240**".
54.	Click the **Add a new row at row 1** button.
55.	Click the button to the right of the **Phone Type** field.
56.	Click the **Mobile** list item. Mobile
57.	Enter the desired information into the **Telephone** field. Enter "**2259368989**".
58.	Click the **Preferred** option.
59.	Click the button to the right of the **Email Type** field.
60.	Click the **LSUHSC Email Address** list item. LSUHSC Email Address

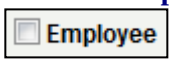
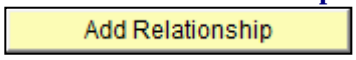
Step	Action
61.	Enter the desired information into the **Email Address** field. Enter "**jcabr@lsuhsc.edu**".
62.	Click the **Preferred** option.
63.	Click the **Regional** tab. 

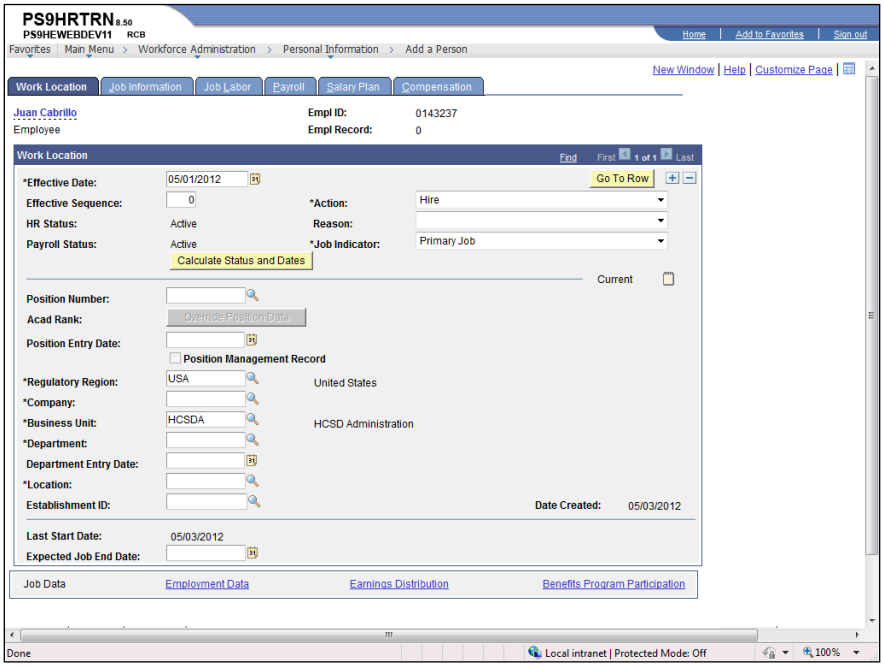


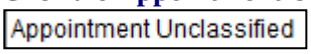
Step	Action
64.	Click the **Look up Ethnic Group** button.
65.	Click the **BLACK - Black/African American** link.
66.	Click the **Primary** option. 
67.	Click the button to the right of the **Military Status** field.
68.	Click the **Active Reserve** list item. 

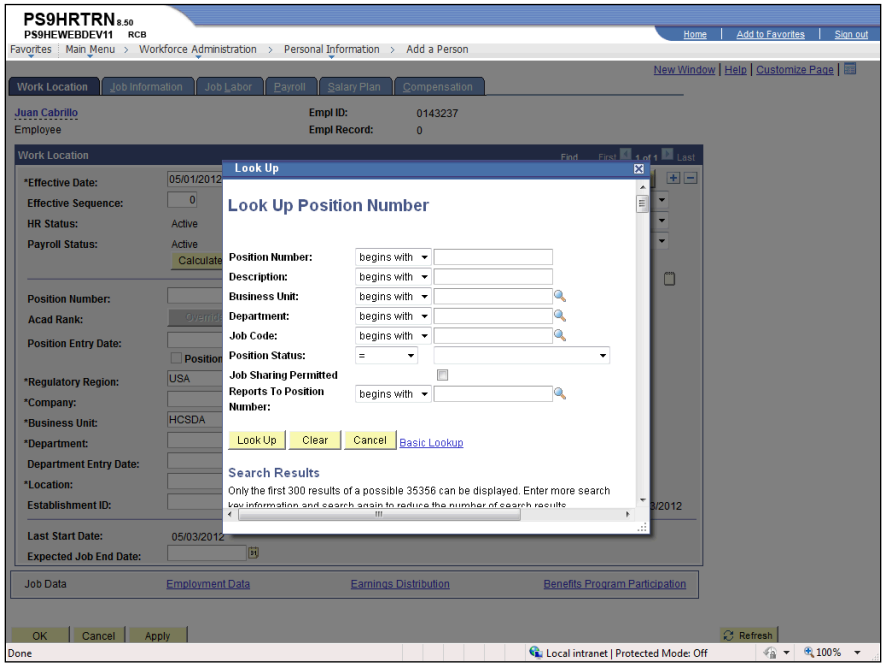
Step	Action
69.	Click the **Organizational Relationships** tab. 



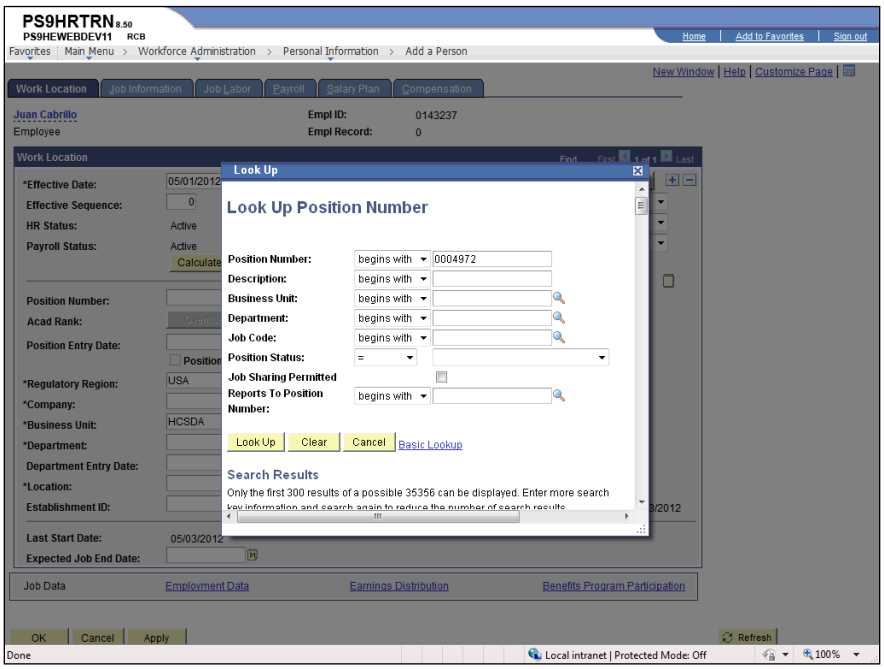
Step	Action
70.	Click the **Employee** option. 
71.	Click the **Add Relationship** button. 



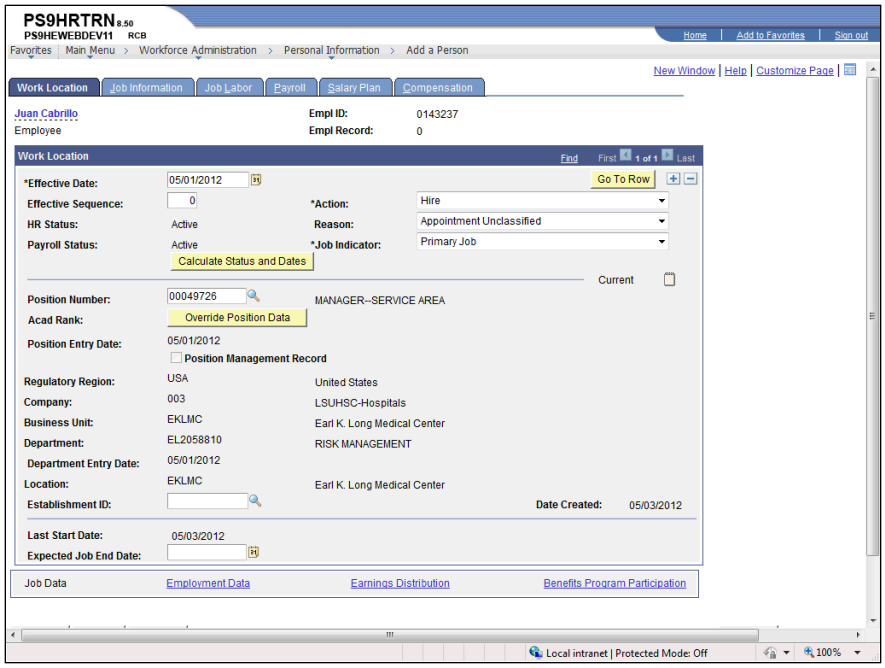
Step	Action
72.	Click the **Reason** list.
73.	Click the **Appointment Unclassified** list item. 
74.	Click the **Look up Position Number** button.



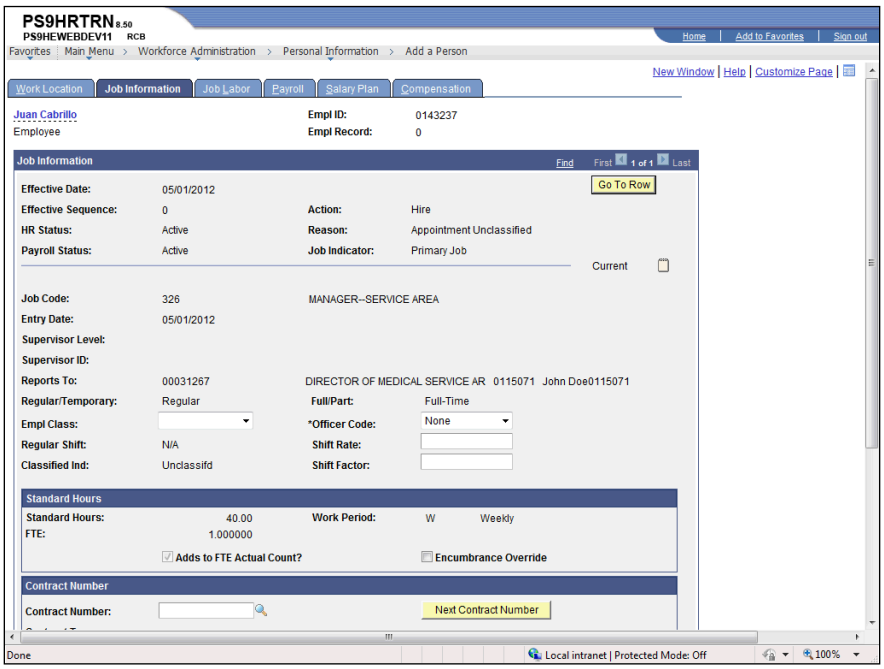
Step	Action
75.	Enter the desired information into the **Position Number** field. Enter "**0004972**".



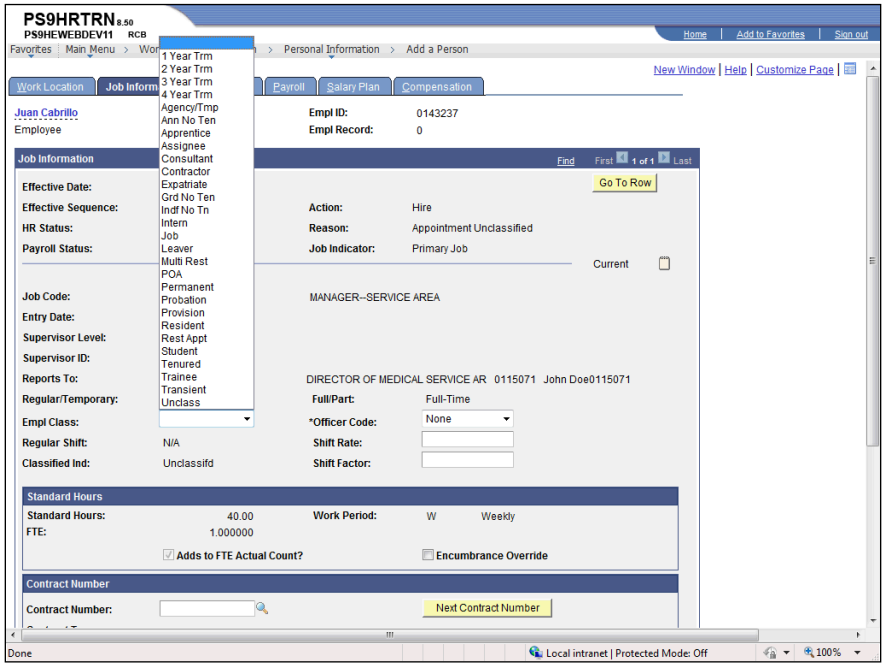
Step	Action
76.	Click the **Look Up** button. Look Up
77.	Click the **00049726 - Manager - Service Area** link. 00049726 MANAGER--SERVICE AREA



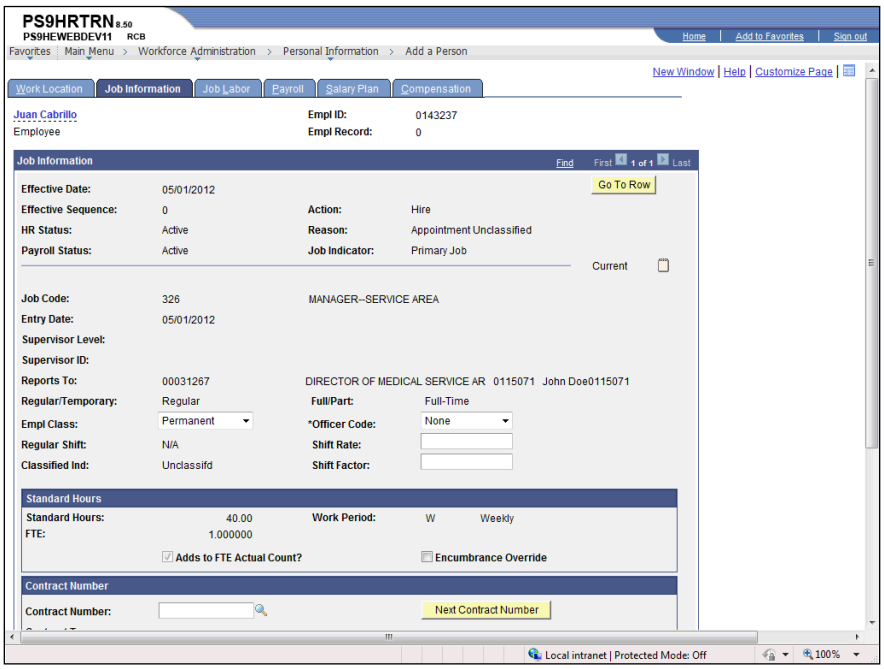
Step	Action
78.	Click the **Job Information** tab.

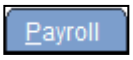


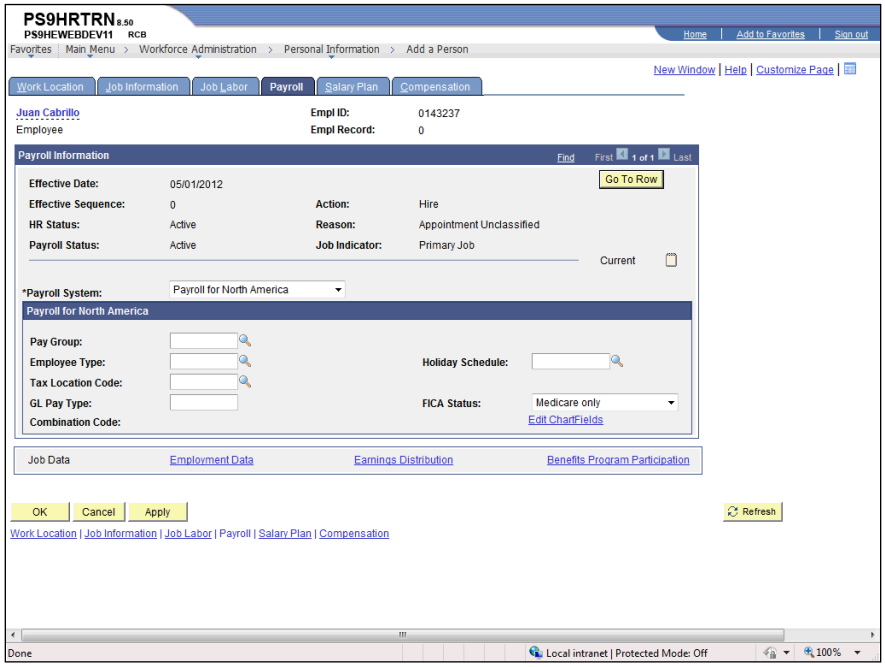
Step	Action
79.	Click the button to the right of the **Empl Class** field.



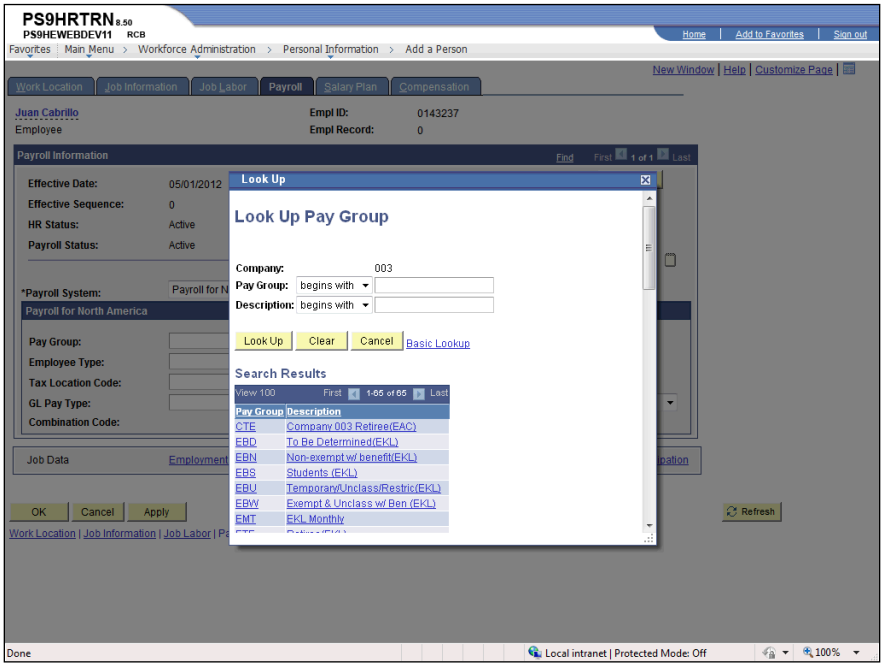
Step	Action
80.	Click the **Permanent** list item. Permanent
81.	The Standard Hours information displays based on the employee's FTE.



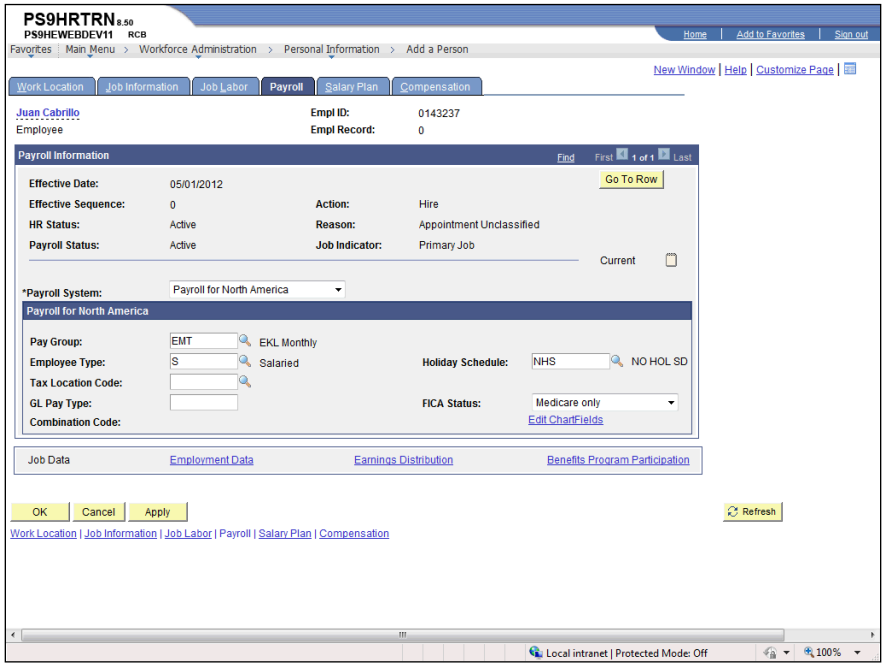
Step	Action
82.	Click the **Payroll** tab. 



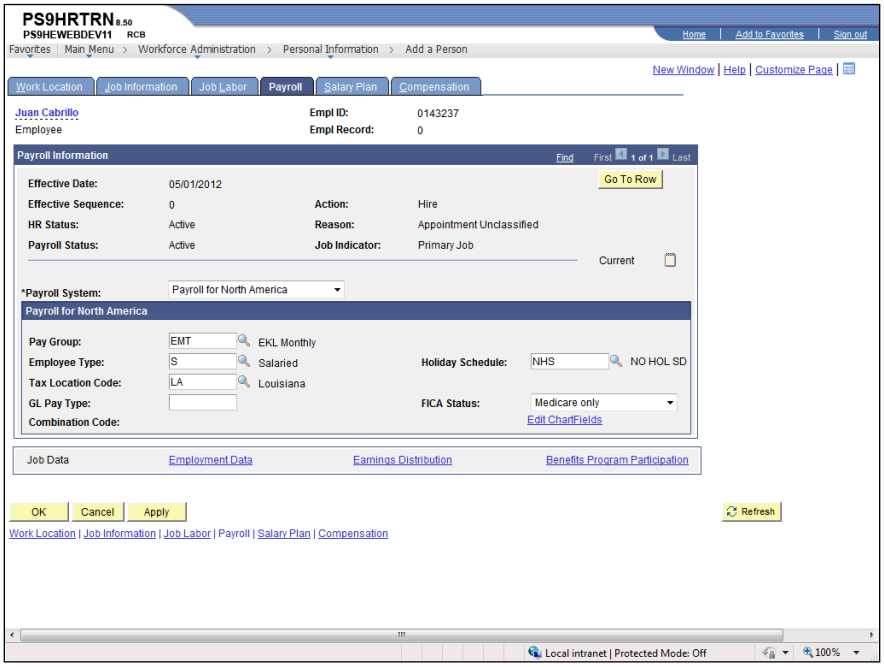
Step	Action
83.	Click the **Look up Pay Group** button.



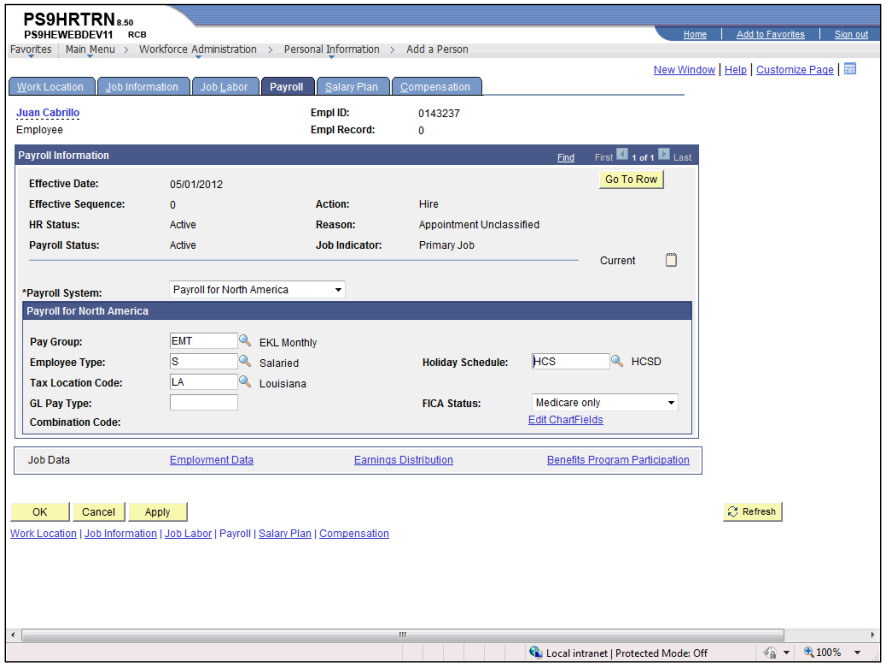
Step	Action
84.	Click the **EMT** link. EMT EKL Monthly

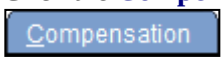


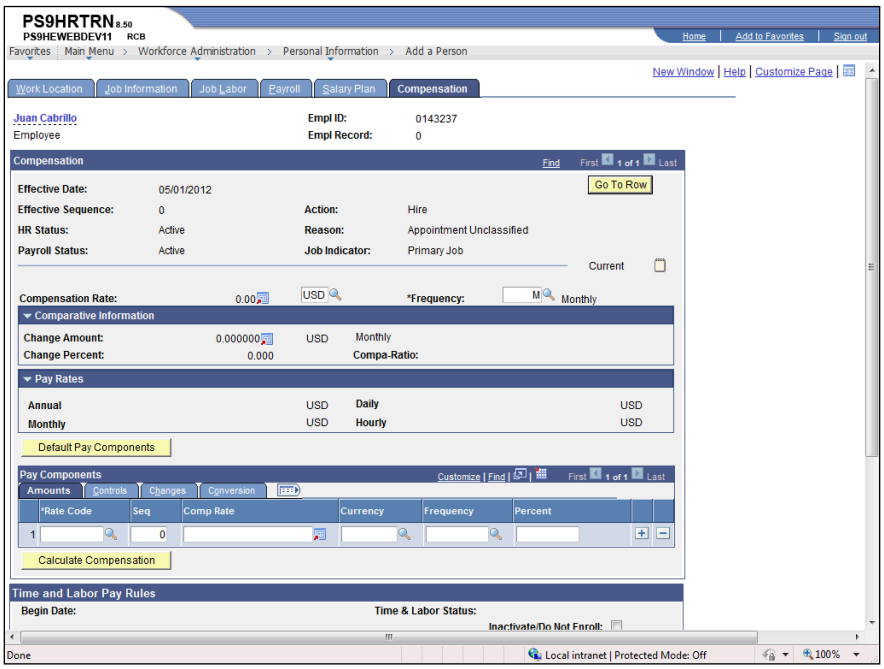
Step	Action
85.	Enter the desired information into the **Tax Location Code** field. Enter "**LA**".



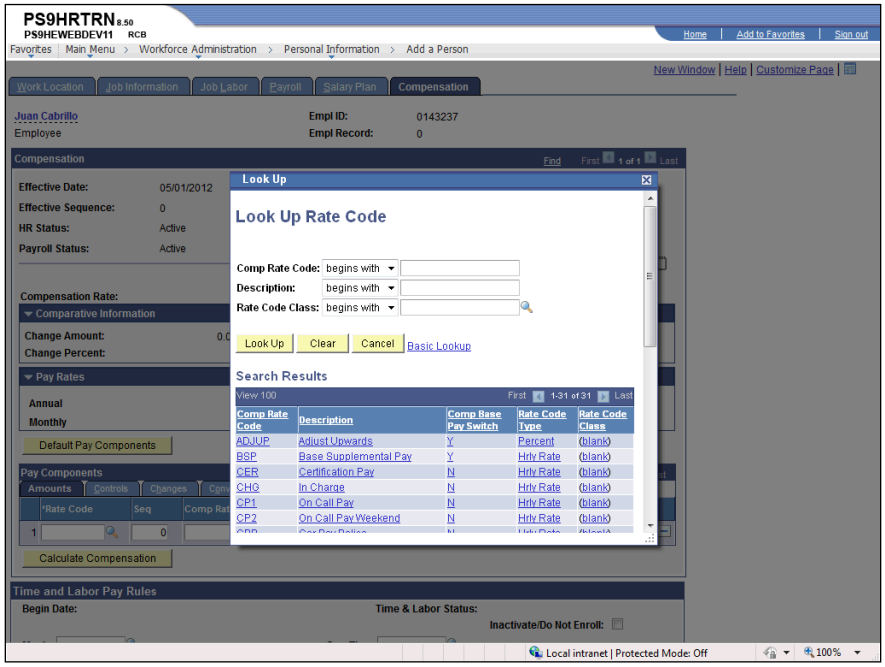
Step	Action
86.	Click the **Look Up Holiday Schedule** button.
87.	Click the **HCS - Health Care Srvs Div** link.



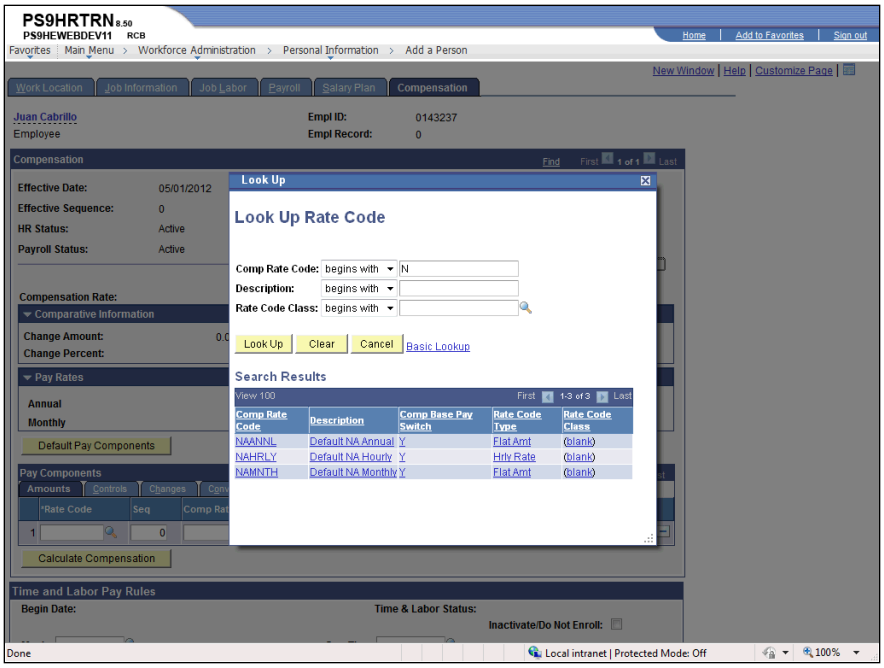
Step	Action
88.	Click the **Compensation** tab. 



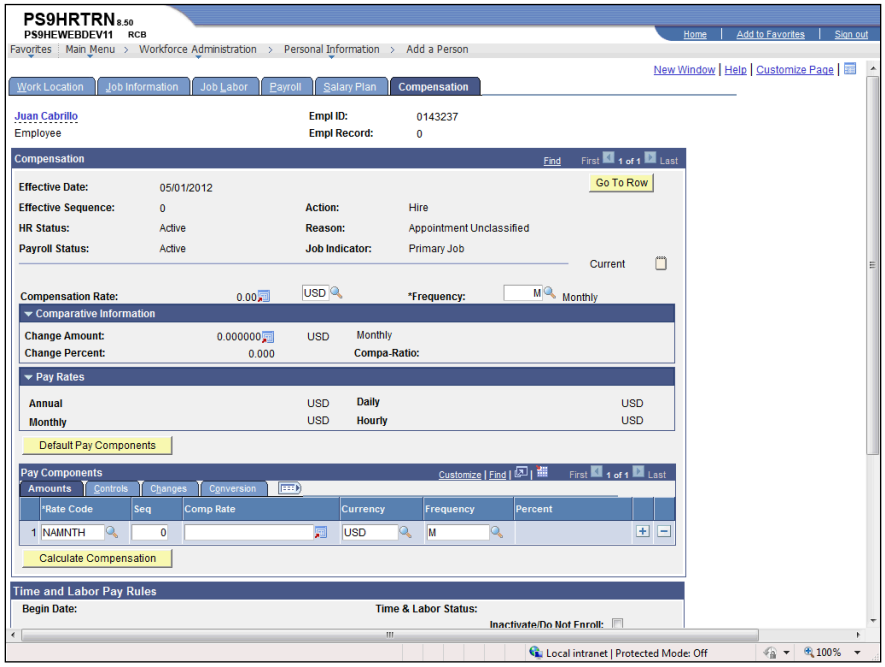
Step	Action
89.	Click the **Rate Code** button.



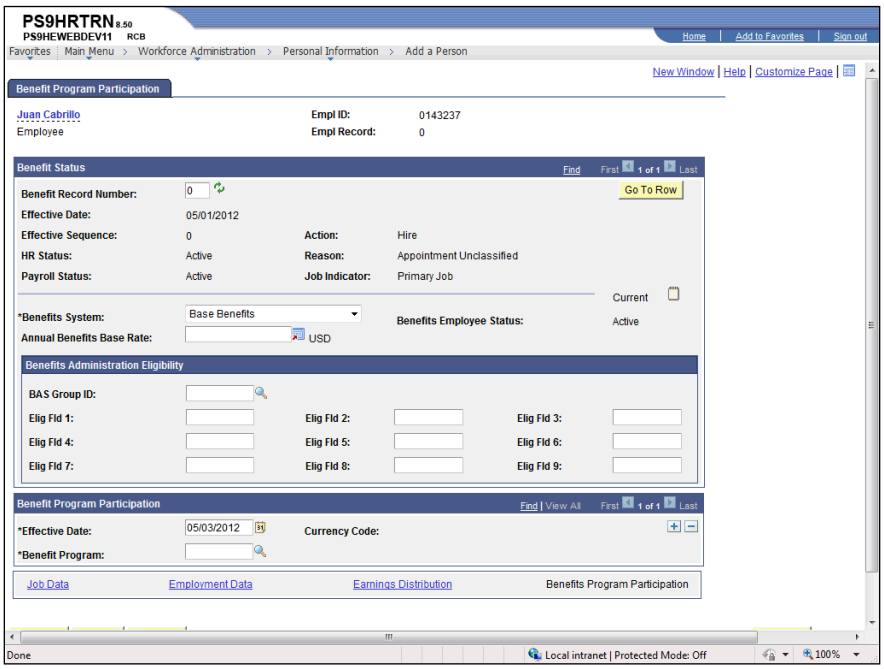
Step	Action
90.	Enter the desired information into the **Comp Rate Code** field. Enter "**N**".
91.	Click the **Look Up** button.



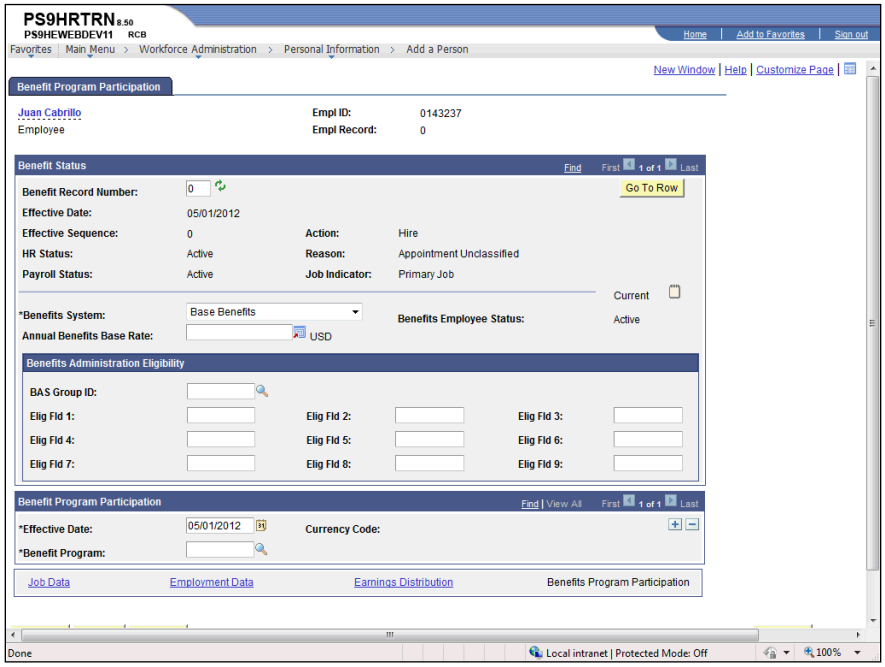
Step	Action
92.	Click the **NAMNTH - Default NA Monthly** link. NAMNTH Default NA Monthly



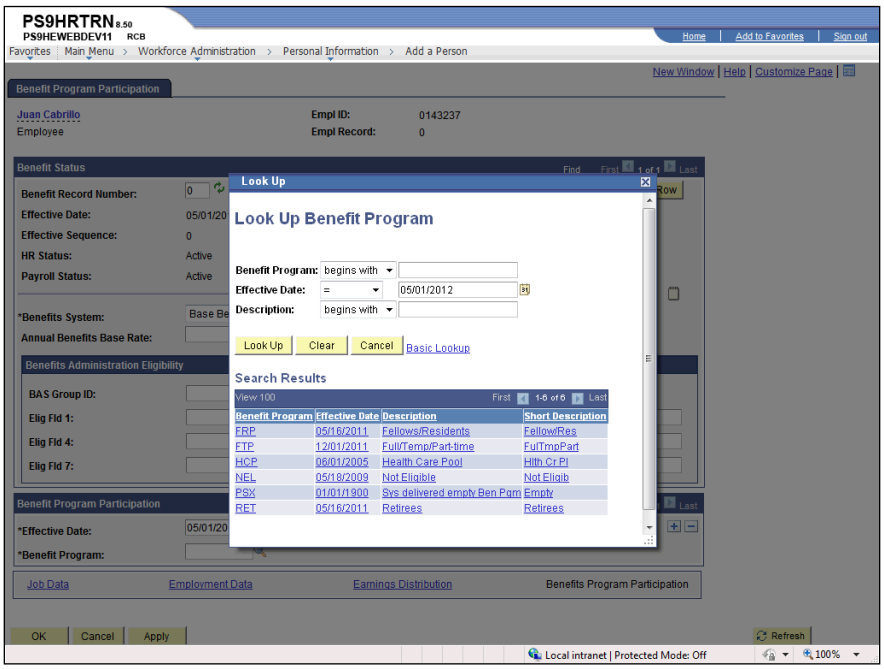
Step	Action
93.	Enter the desired information into the **Comp Rate** field. Enter "**5000.00**".
94.	Click the **Calculate Compensation** button. Calculate Compensation
95.	Annual and Monthly compensation rates display in the Comparative Information and Pay Rates sections. Click the **Benefits Program Participation** link. Benefits Program Participation
96.	***NOTE: The Effective Date defaults as the current date. Depending on when you are entering the employee's information into the system, you may need to change the Effective Date. The Effective Date is the employee's hire date.***



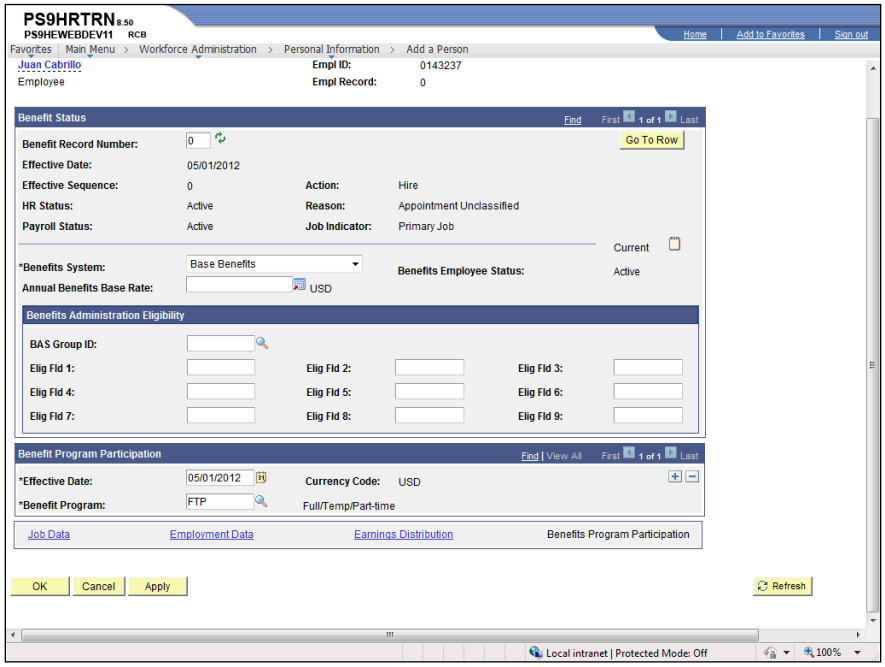
Step	Action
97.	In this example the effective Date has defaulted to the current date. This must be changed to reflect the employee's hire date. Click the **Choose a date** button.
98.	Click the desired date.



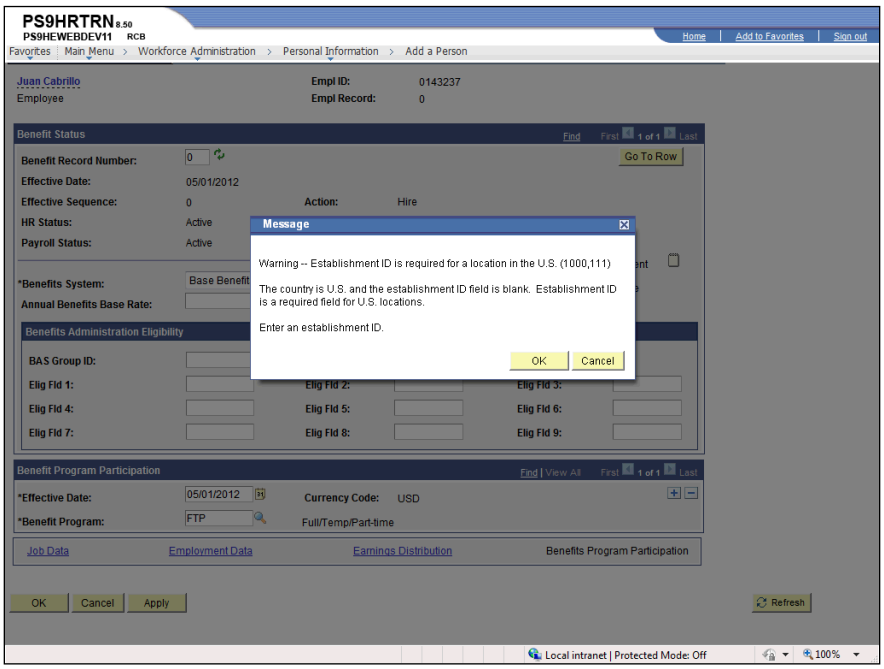
Step	Action
99.	Click the **Look up Benefit Program** button.



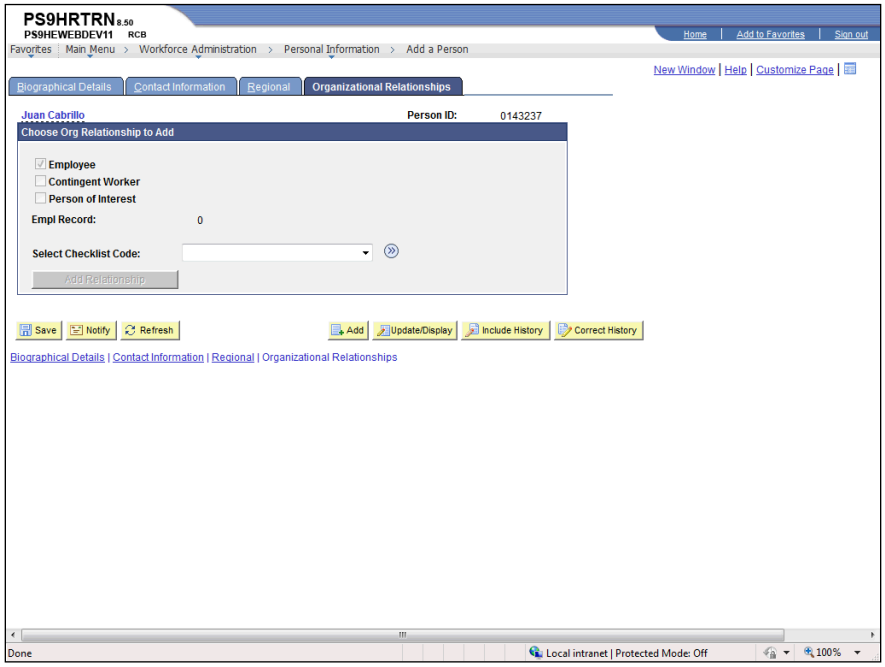
Step	Action
100.	Click the **FTP - Full/Temp/Part-time** link. FTP 12/01/2011 Full/Temp/Part-time



Step	Action
101.	Click the **OK** button. OK



Step	Action
102.	Click the **OK** button. OK



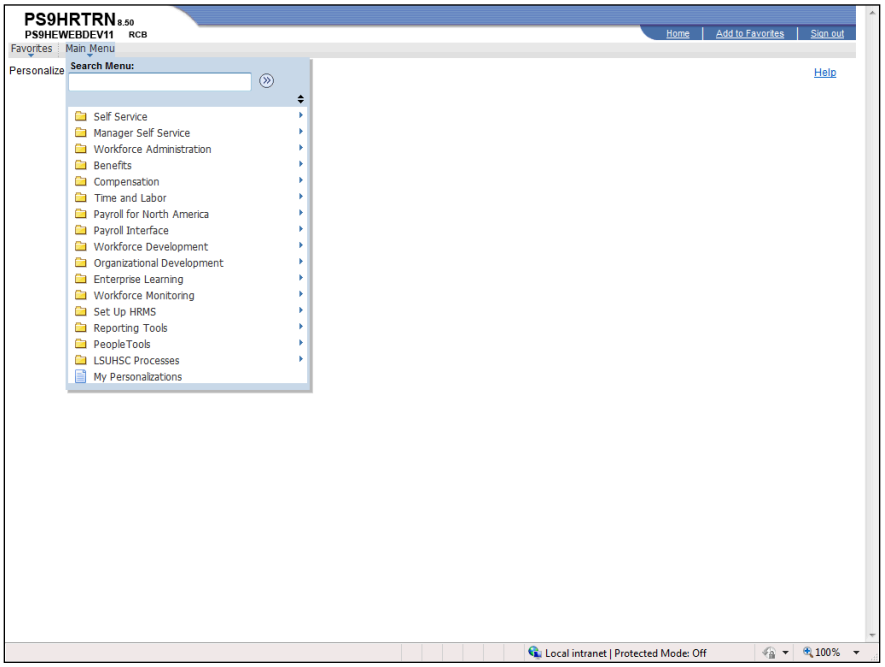
Step	Action
103.	Click the **Save** button.
104.	This completes **Add a Person - Unclassified**. **End of Procedure.**

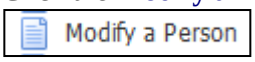
Record an Employee Data Change

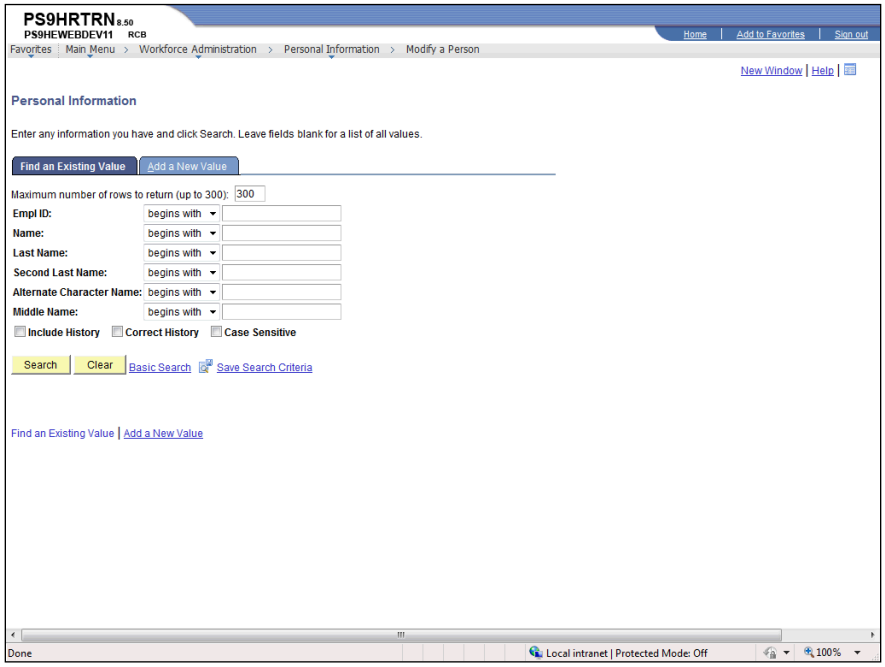
Procedure

In this topic you will learn how to **Record an Employee Data Change**.

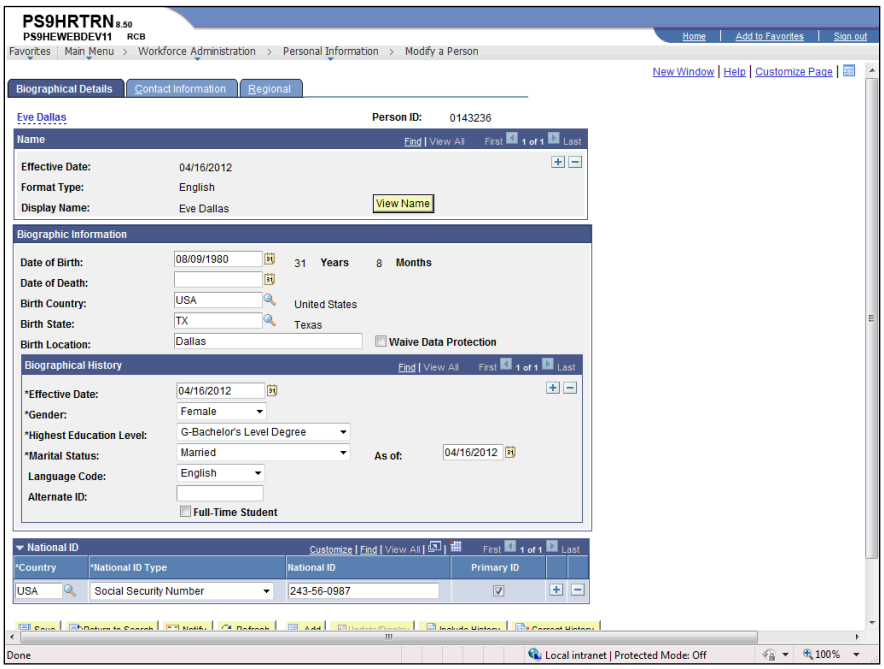
Step	Action
1.	Click the **Main Menu** button.



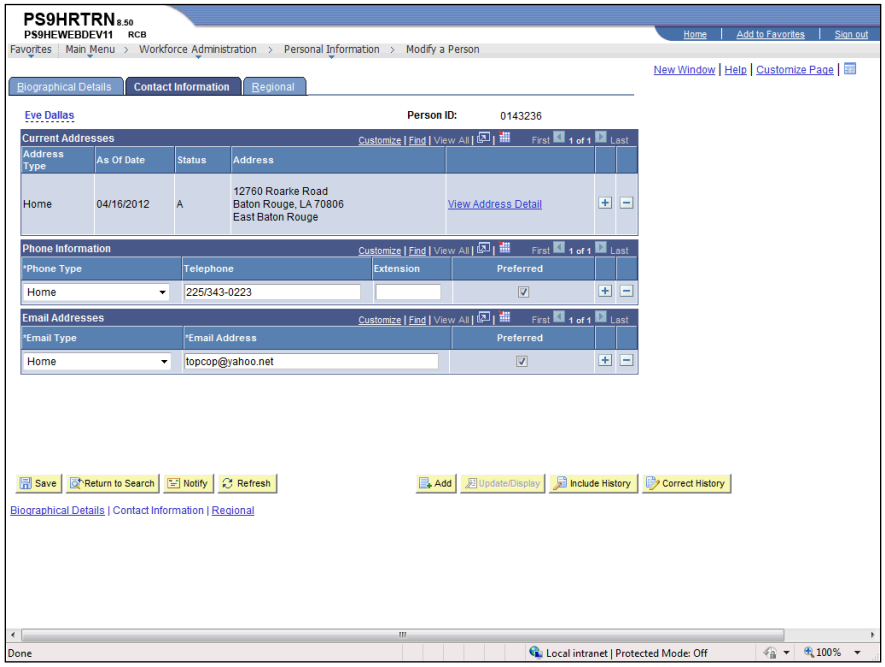
Step	Action
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Modify a Person** menu. 



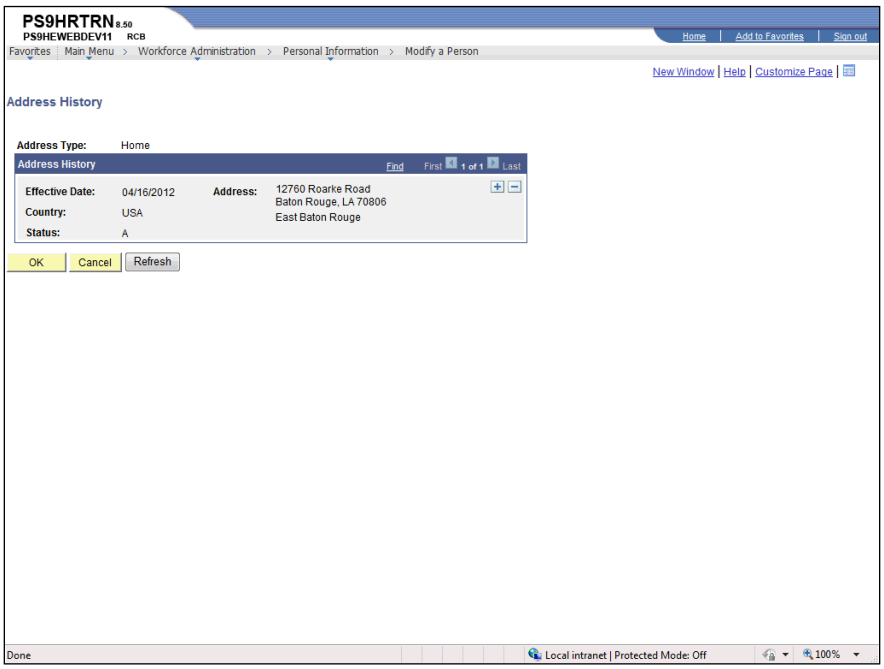
Step	Action
5.	Enter the desired information into the **Last Name** field. Enter "**dallas**".
6.	Click the **Search** button. Search
7.	In this example update the employee's contact information by adding a new home address and adding his work telephone and email address.



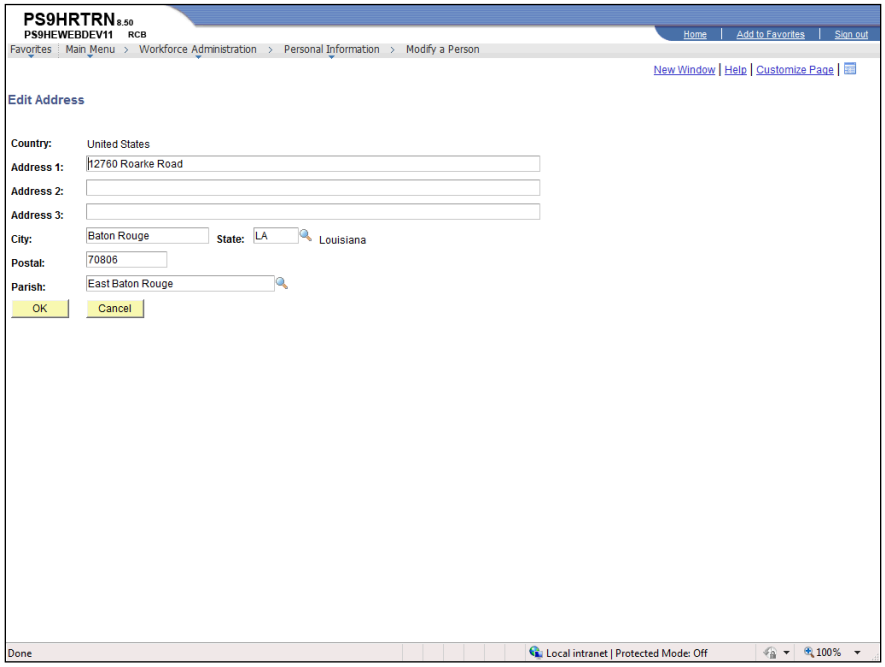
Step	Action
8.	Click the **Contact Information** tab.



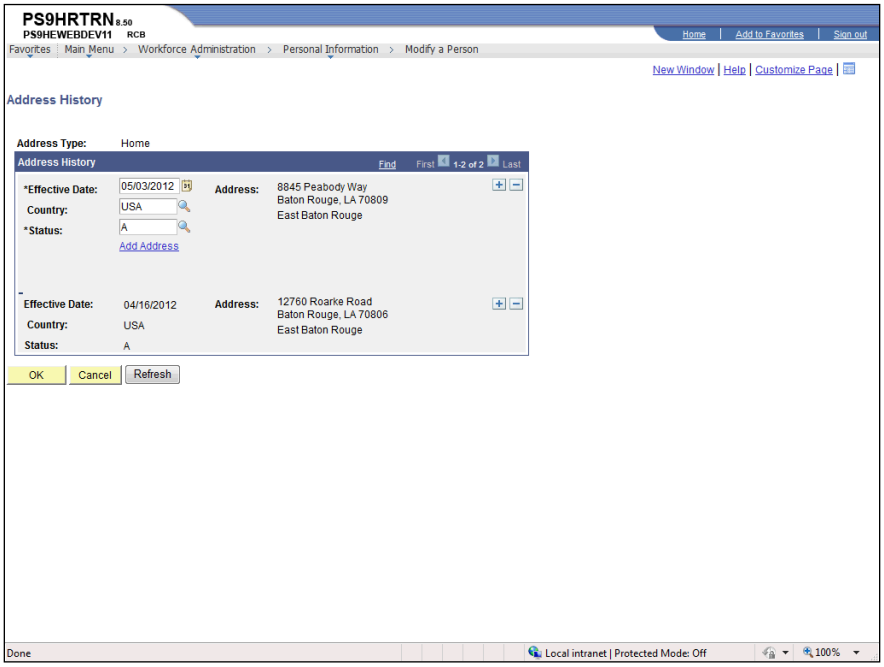
Step	Action
9.	Click the **View Address Detail** link. View Address Detail



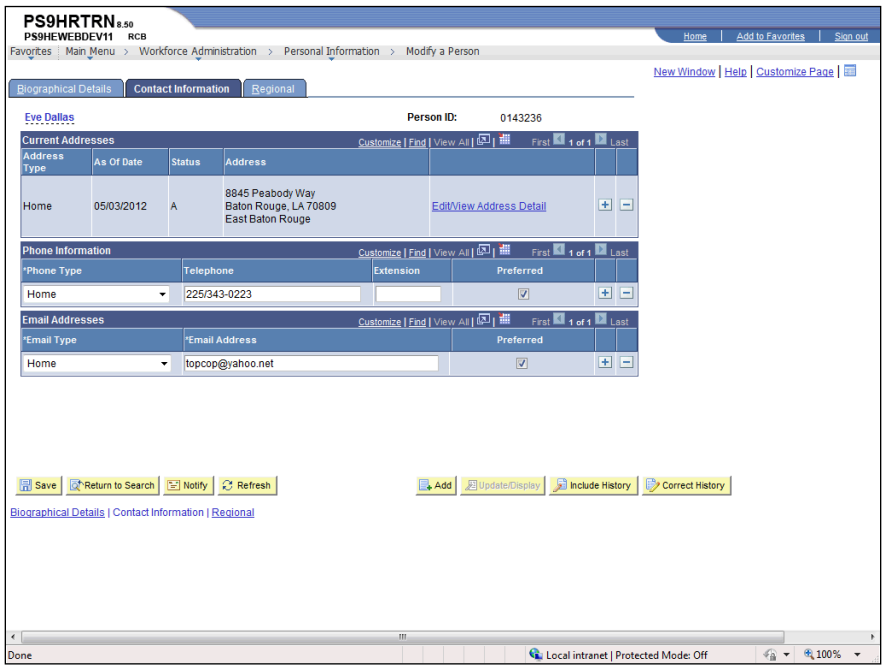
Step	Action
10.	Click the **Add a new row at row 1** button.
11.	The Effective Date defaults to the current date. Click the **Add Address** link.

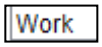
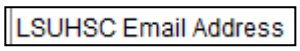


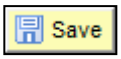
Step	Action
12.	Enter the desired information into the **Address 1** field. Enter "**8845 Peabody Way**". ***NOTE: The Address 1 field has a limited number of characters. Use the Address 2 field for apartment numbers, P.O. Box numbers, etc.***
13.	Enter the desired information into the **Postal** field. Enter "**70809**".
14.	Click the **OK** button. OK



Step	Action
15.	Click the **OK** button. OK



Step	Action
16.	Click the **Add a new row at row 1 (Alt+7)** button.
17.	Click the button to the right of the **Phone Type** field.
18.	Click the **Work** list item. 
19.	Enter the desired information into the **Telephone** field. Enter "**2259229999**".
20.	Click the **Preferred** option.
21.	Click the **Add a new row at row 1 (Alt+7)** button.
22.	Click the button to the right of the **Email Type** field.
23.	Click the **LSUHSC Email Address** list item. 
24.	Enter the desired information into the **Email Address** field. Enter "**edall@lsuhsc.edu**".
25.	Click the **Preferred** option.

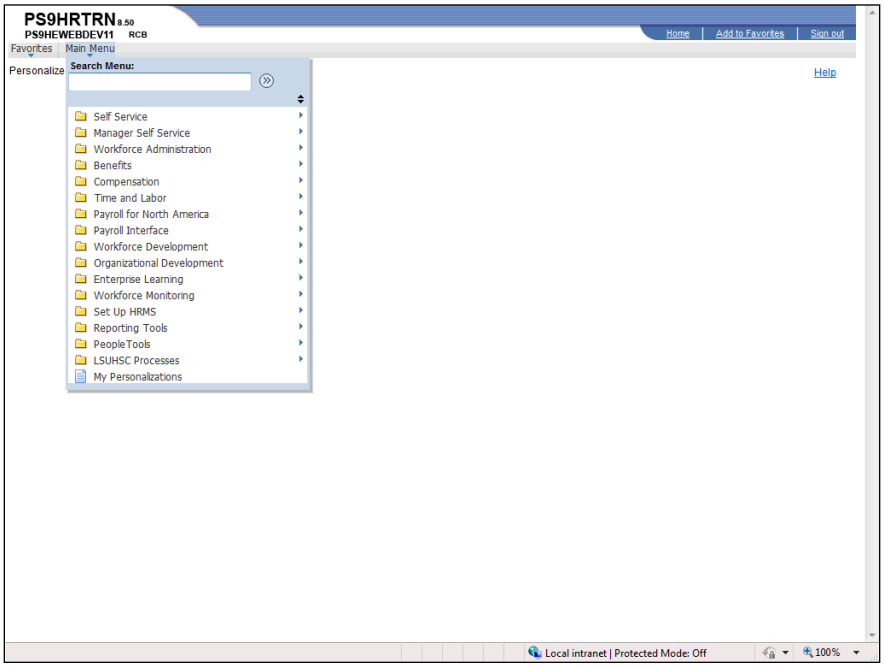
Step	Action
26.	Click the **Save** button. 
27.	This completes **Record an Employee Data Change**. **End of Procedure.**

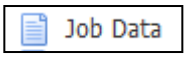
Add a Concurrent Job

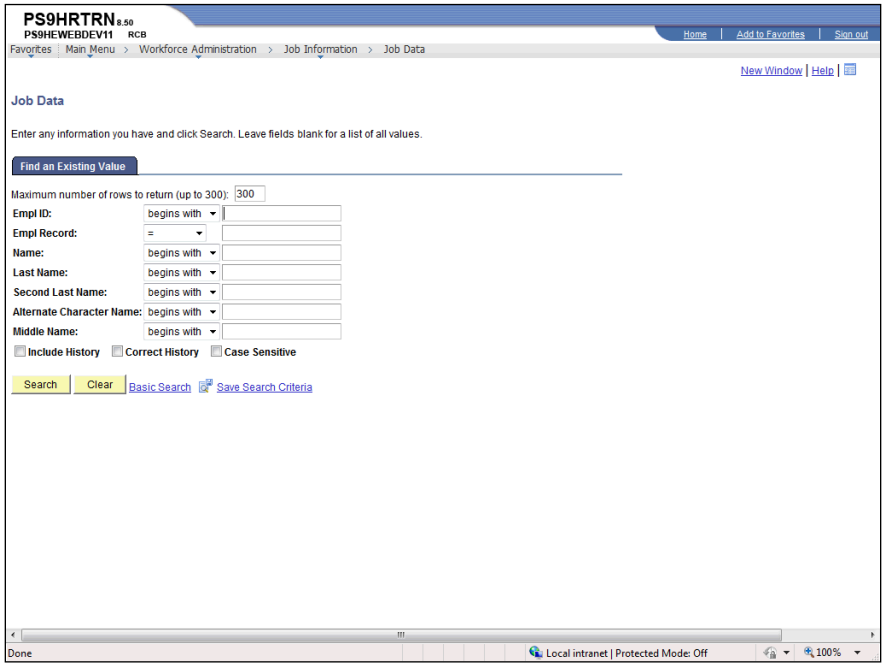
Procedure

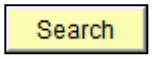
In this topic you will learn how to **Add a Concurrent Job**.

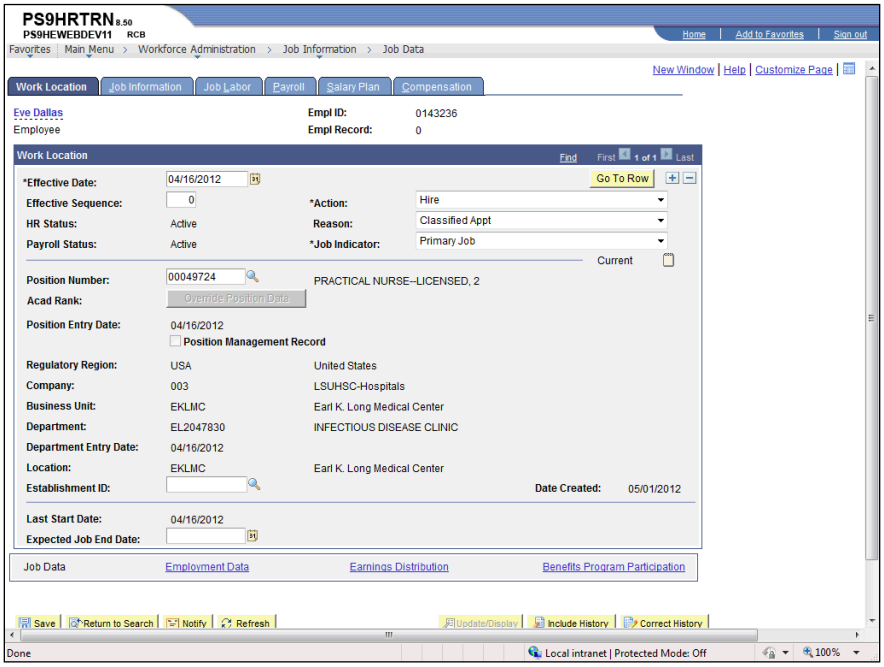
Step	Action
1.	Click the **Main Menu** button.

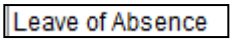
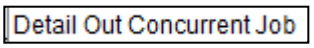


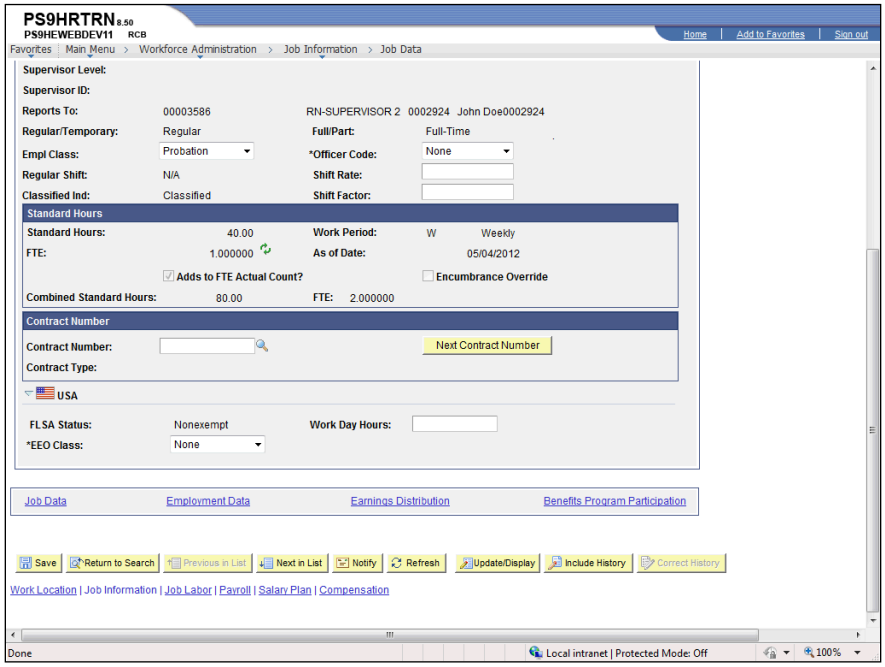
Step	Action
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** menu. 

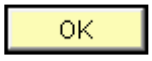
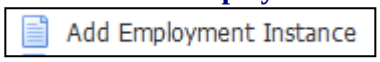


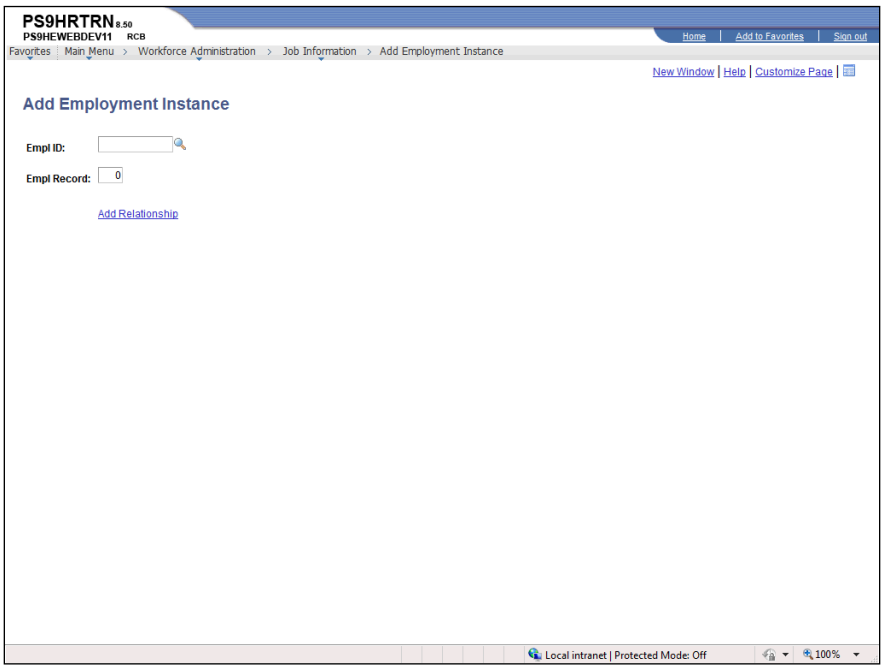
Step	Action
5.	Enter the desired information into the **Last Name** field. Enter "**dallas**".
6.	Click the **Search** button. 



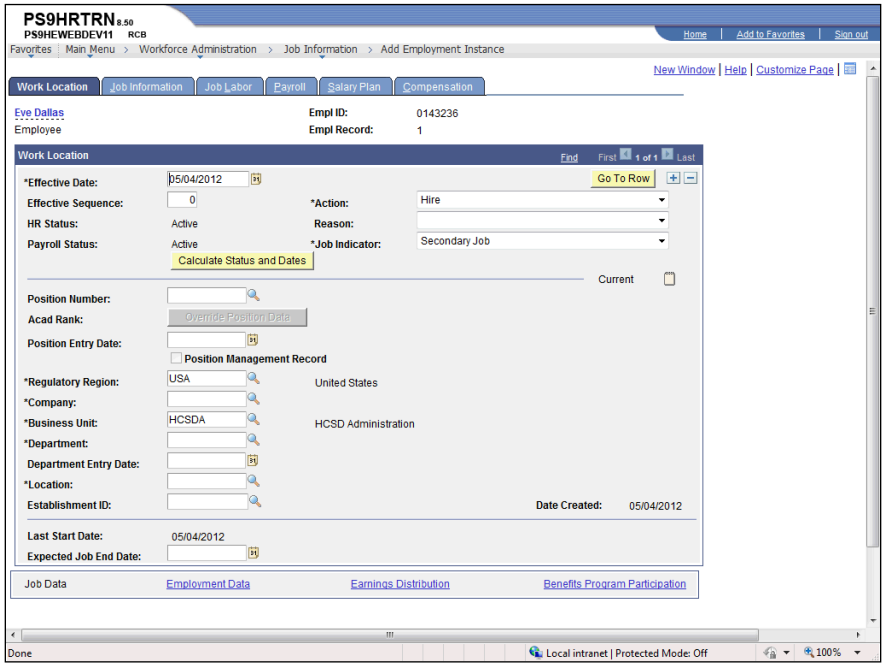
Step	Action
7.	***NOTE: Make note of the Empl ID number for use later in this exercise.*** Click the **Add a new row at row 1** button.
8.	Click the button to the right of the **Action** field.
9.	Click the **Leave of Absence** list item. 
10.	Click the button to the right of the **Reason** field.
11.	Click the **Detail Out Concurrent Job** list item. 
12.	Click the **Job Information** tab.

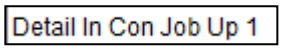
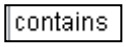


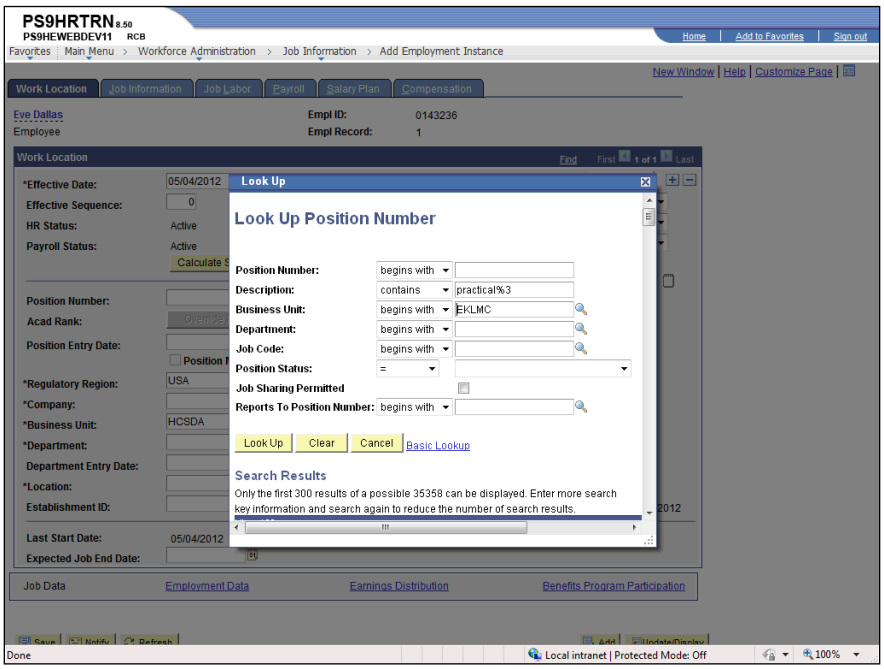
Step	Action
13.	Enter the desired information into the **Work Day Hours** field. Enter "**.01**".
14.	Click the **Save** button.
15.	Click the **OK** button. 
16.	Click the **Job Information** link.
17.	Click the **Add Employment Instance** menu. 



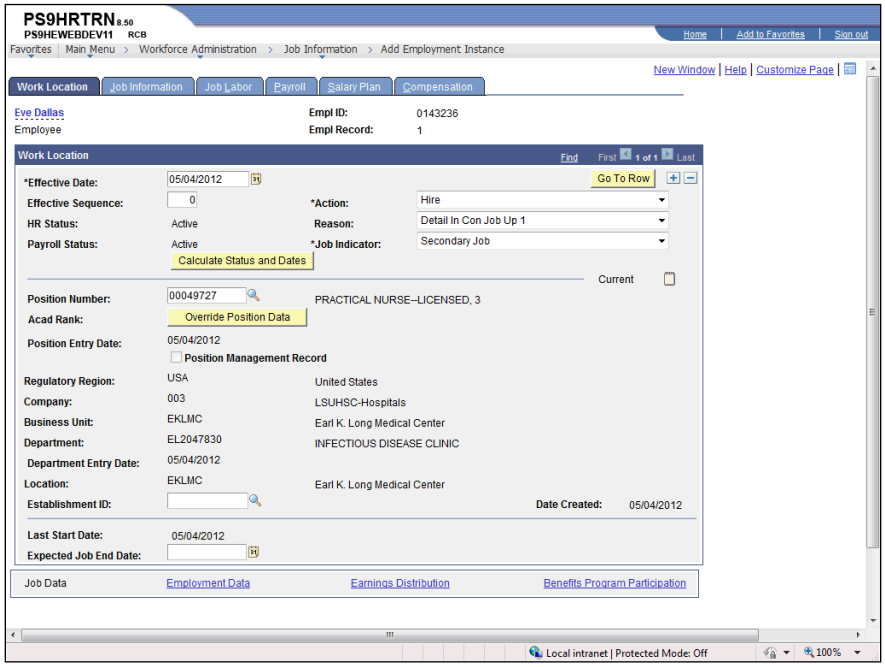
Step	Action
18.	Enter the desired information into the **Empl ID** field. Enter "**0143236**".
19.	Click the **Add Relationship** link. Add Relationship



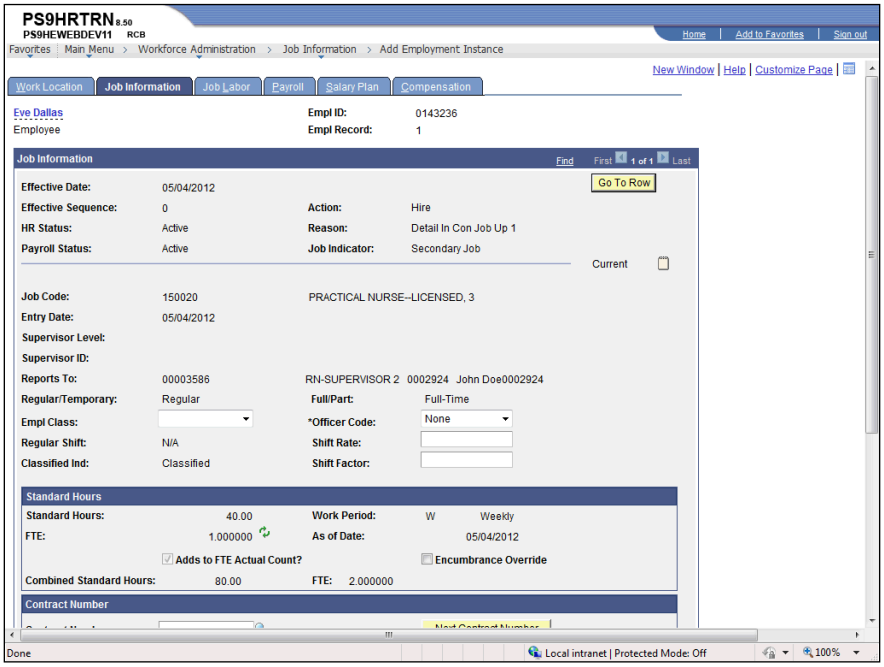
Step	Action
20.	Click the button to the right of the **Reason** field.
21.	Click the **Detail In Con Job Up 1** list item. 
22.	Click the **Look up Position Number** button.
23.	Click the button to the right of the **Description** field.
24.	Click the **contains** list item. 
25.	Enter the desired information into the **Description** field. Enter "**practical%3**".
26.	Click the **Look up Business Unit** button.
27.	Click the **EKLMC** link.



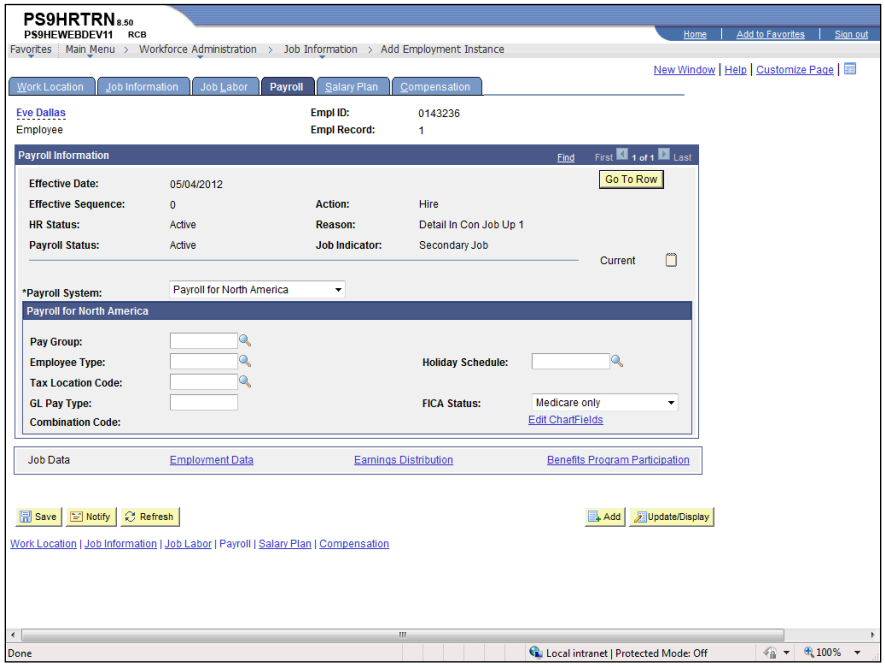
Step	Action
28.	Click the **Look Up** button. Look Up
29.	Click the **00049727** link.



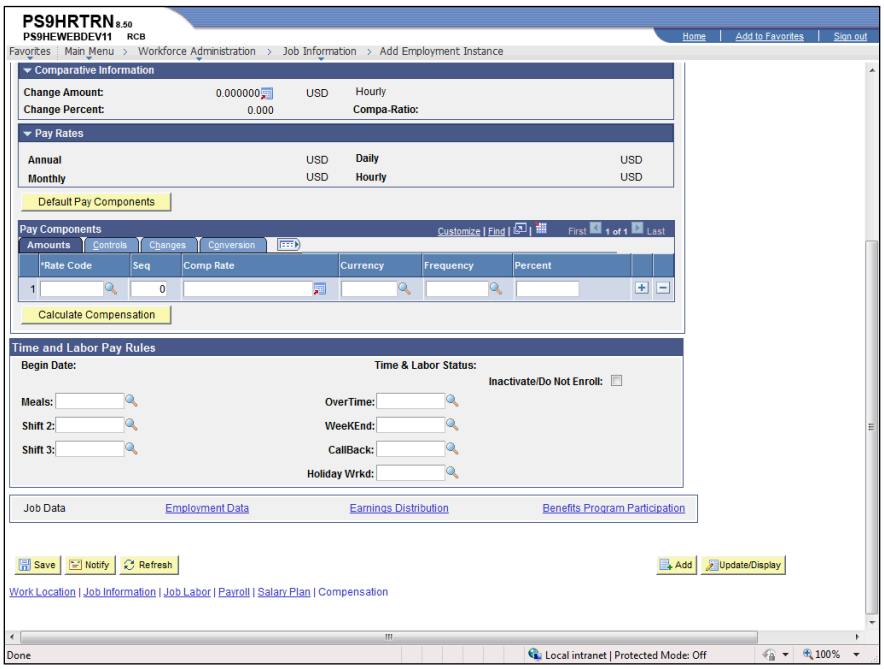
Step	Action
30.	Click the **Job Information** tab.



Step	Action
31.	Click the button to the right of the **Empl Class** field.
32.	Click the **Permanent** list item. Permanent
33.	Click the **Payroll** tab. Payroll

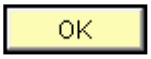
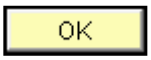
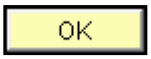


Step	Action
34.	Click the **Look up Pay Group (Alt+5)** button.
35.	Click the **EBN** link.
36.	Enter the desired information into the **Tax Location Code** field. Enter "**LA**".
37.	Click the **Look up Holiday Schedule** button.
38.	Click the **HCS** link.
39.	Click the **Compensation** tab.



Step	Action
40.	Click the **Look up Meals** button.
41.	Click the **30MIN** link.
42.	Click the **Look up Shift 2** button.
43.	Click the **S2_3P1130P** link.
44.	Click the **Look up Shift 3** button.
45.	Click the **S3_11P730A** link.
46.	Click the **Look up OverTime** button.
47.	Click the **40_KT-V** link.
48.	Click the **Look up WeeKEnd** button.

Step	Action
49.	Click the **W3_7A730A** link.
50.	Click the **Look up Holiday Wrkd** button.
51.	Click the **KTH-HOL** link.
52.	Click the **Look up Rate Code** button.
53.	Enter the desired information into the **Comp Rate Code** field. Enter "**N**".
54.	Click the **Look Up** button.
55.	Click the **NAHRLY** link.
56.	Enter the desired information into the **Comp Rate** field. Enter "**19.66**".
57.	Click the **Add a new row at row 1** button.
58.	Click the **Look up Rate Code** button.
59.	Enter the desired information into the **Comp Rate Code** field. Enter "**S**".
60.	Click the **Look Up** button.
61.	Click the **SH2** link.
62.	Enter the desired information into the **Comp Rate** field. Enter "**0.50**".
63.	Click the **Add a new row at row 2** button.
64.	Click the **Look up Rate Code** button.
65.	Click the **Down** button of the scrollbar.
66.	Click the **SH3** link.
67.	Enter the desired information into the **Comp Rate** field. Enter "**0.50**".

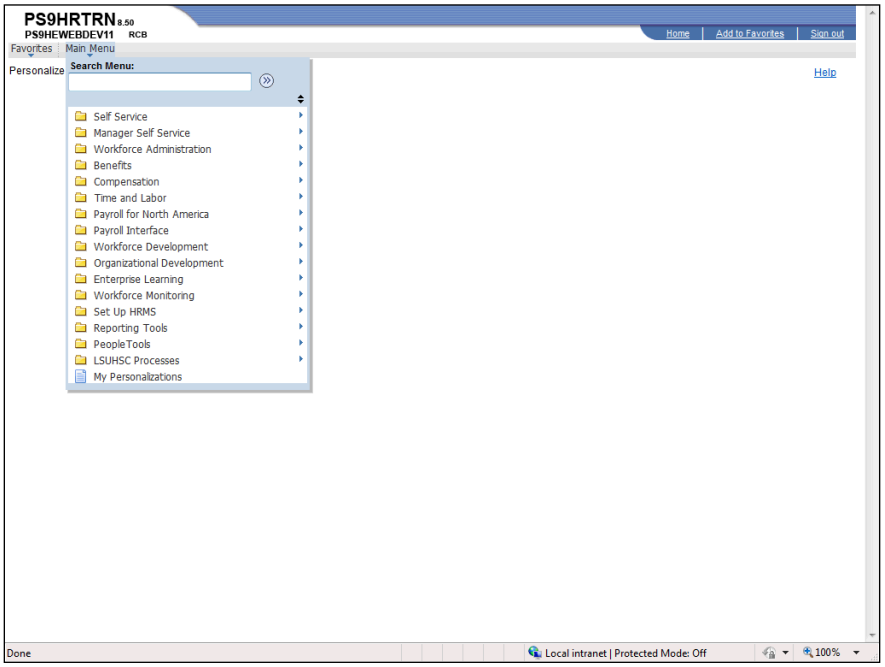
Step	Action
68.	Click the **Add a new row at row 3** button.
69.	Click the **Look up Rate Code** button.
70.	Click the **Down** button of the scrollbar.
71.	Click the **WKN** link.
72.	Enter the desired information into the **Comp Rate** field. Enter "**1.00**".
73.	Click the **Calculate Compensation** button.
74.	Click the **Save** button.
75.	Click the **OK** button. 
76.	Click the **OK** button. 
77.	Click the **OK** button. 
78.	This completes **Add a Concurrent Job**. **End of Procedure.**

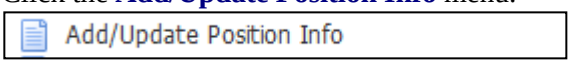
Record a Department Change

Procedure

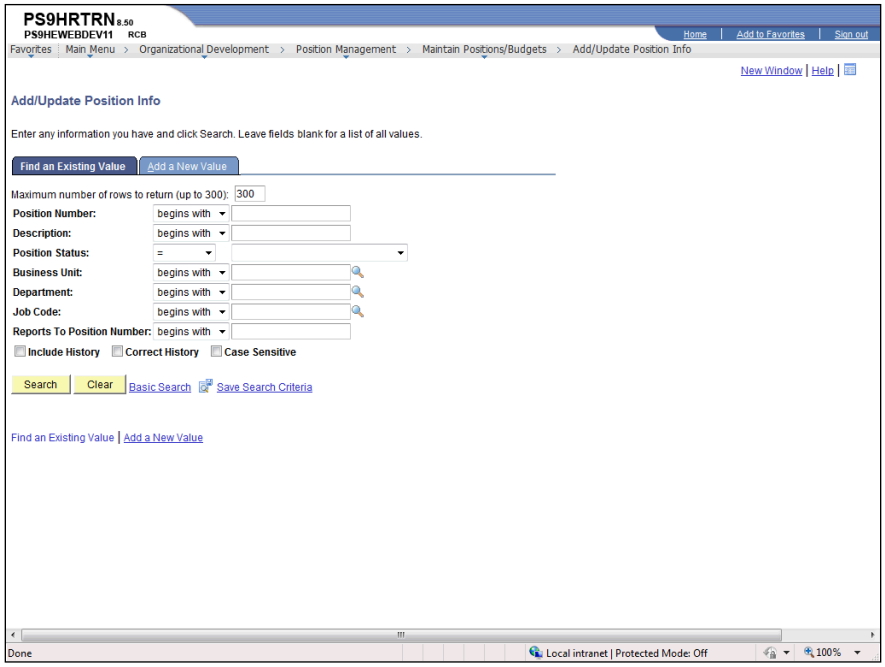
In this topic you will learn how to **Record a Department Change**.

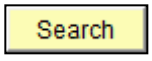
Step	Action
1.	Click the **Main Menu** button.

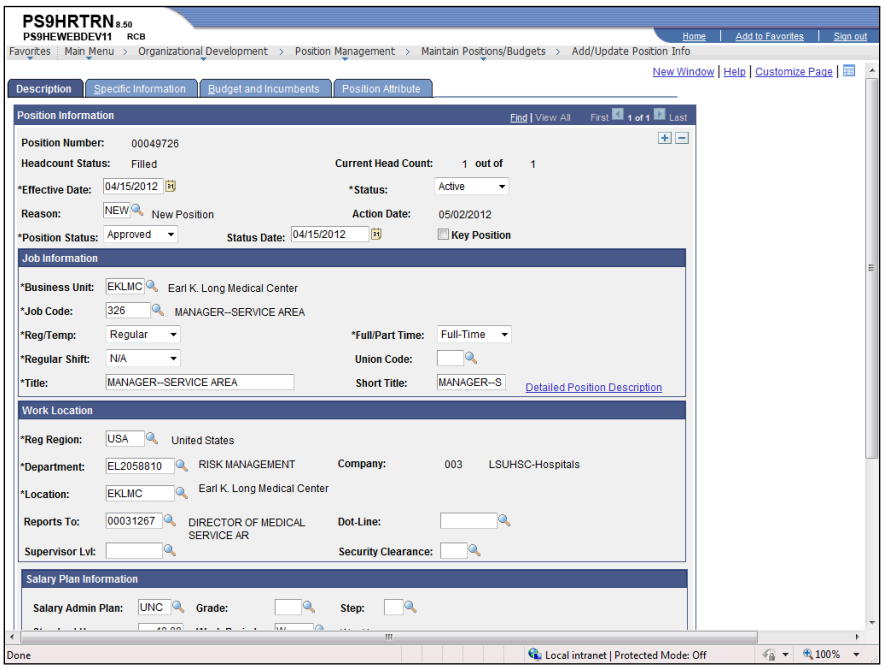


Step	Action
2.	Point to the **Organizational Development** menu.
3.	Point to the **Position Management** menu.
4.	Point to the **Maintain Positions/Budgets** menu.
5.	Click the **Add/Update Position Info** menu. 

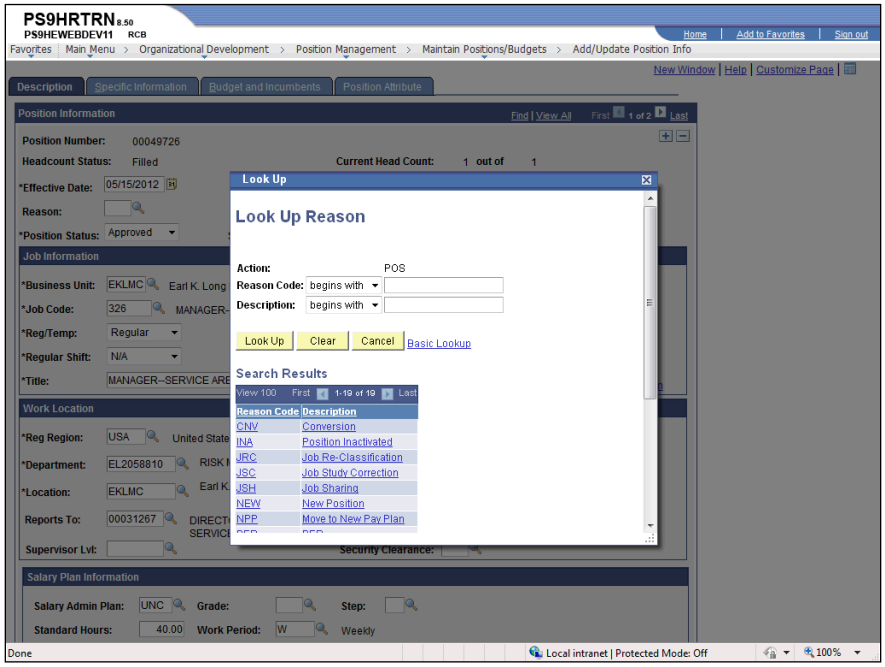
Step	Action
6.	A Department Change must be entered in two (2) places within the system: 1. The Description tab in Add/Update Position Info and 2. The Work Location tab in Job Data. ***NOTE: Changes must first be added to the Description tab in Add/Update Position Info.***
7.	In this exercise Juan Cabrillo will change departments from EL 2058810 to EL2058790. ***NOTE: The employee's original Position Number must be known. The Position Number can be found on the Work Location tab in Job Data.***



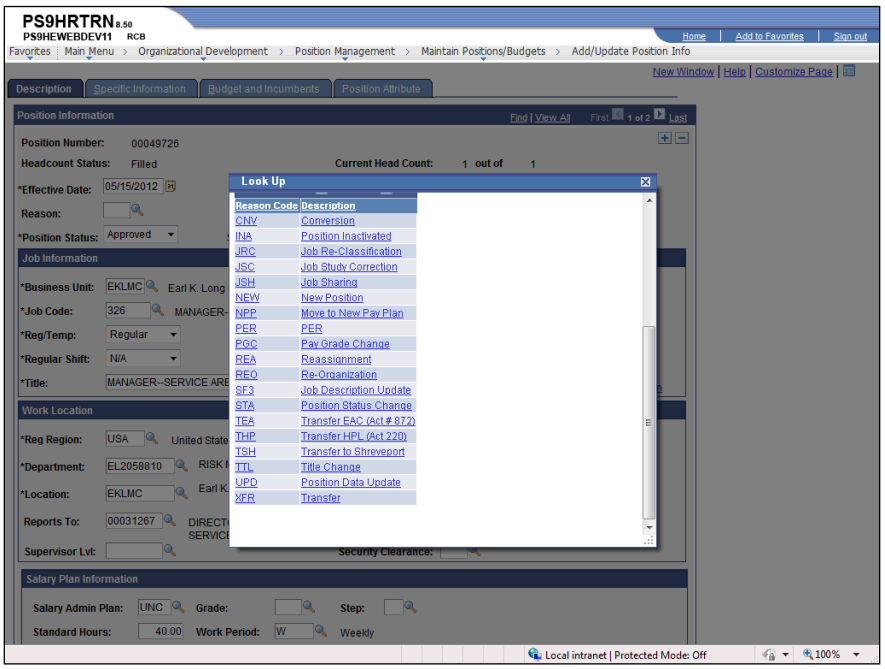
Step	Action
8.	Enter the desired information into the **Position Number** field. Enter "**00049726**".
9.	Click the **Search** button. 



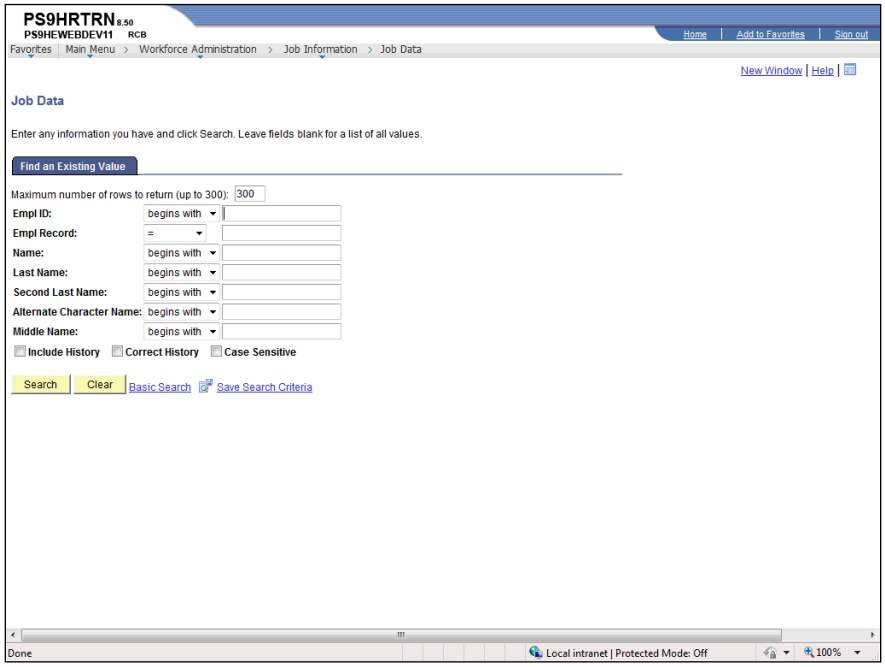
Step	Action
10.	Click the **Add a new row at row 1** button.
11.	The Effective Date defaults to the current date. The effective Date is the date the department change will occur. Click the **Choose a date** button.
12.	Click the desired date.
13.	Click the **Look up Reason** button.



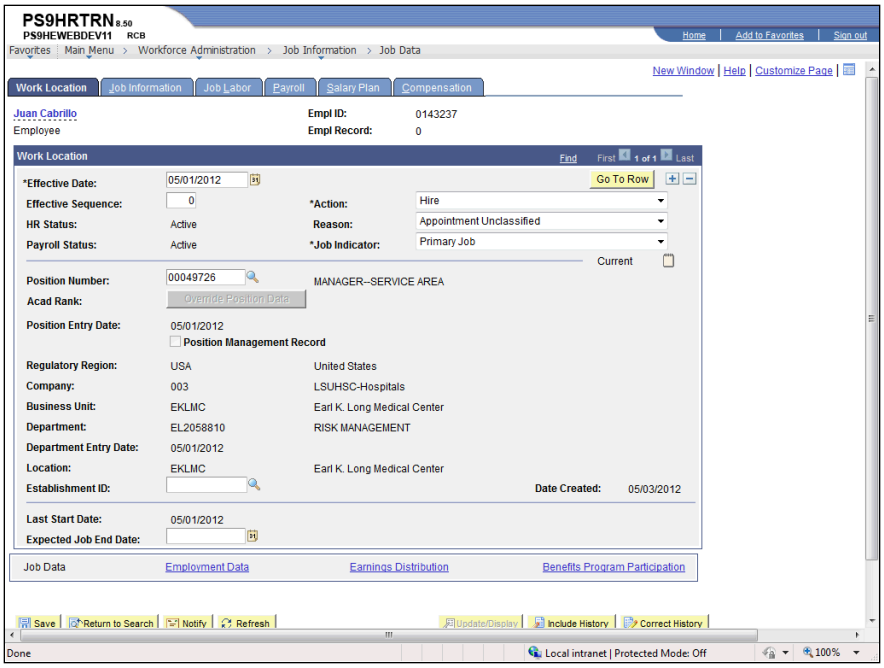
Step	Action
14.	Scroll to the bottom of the pop up page. Click the **Down** button of the scrollbar.

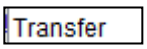
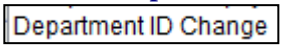
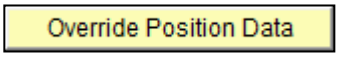


Step	Action
15.	Click the **XFR - Transfer** link. XFR Transfer
16.	Enter the desired information into the **Department** field. Enter "**EL2058790**".
17.	Even though the Location is displayed on the page, it must be selected again. Click the **Look up Location** button.
18.	Click the **EKLMC** link. EKLMC Earl K. Long Medical Center
19.	Click the **Save** button. Save
20.	Click the **OK** button. OK
21.	Click the **Main Menu** button. Main Menu
22.	Point to the **Workforce Administration** menu.
23.	Point to the **Job Information** menu.
24.	Click the **Job Data** menu. Job Data



Step	Action
25.	Enter the desired information into the **Last Name** field. Enter "**cabrillo**".
26.	Click the **Search** button. Search



Step	Action
27.	Click the **Add a new row at row 1** button.
28.	The Effective Date will be the date the department change will occur. Click the **Choose a date** button.
29.	Click the desired date.
30.	Click the button to the right of the **Action** field.
31.	Click the **Transfer** list item. 
32.	Click the button to the right of the **Reason** field.
33.	Click the **Department ID Change** list item. 
34.	Click the **Override Position Data** button. 

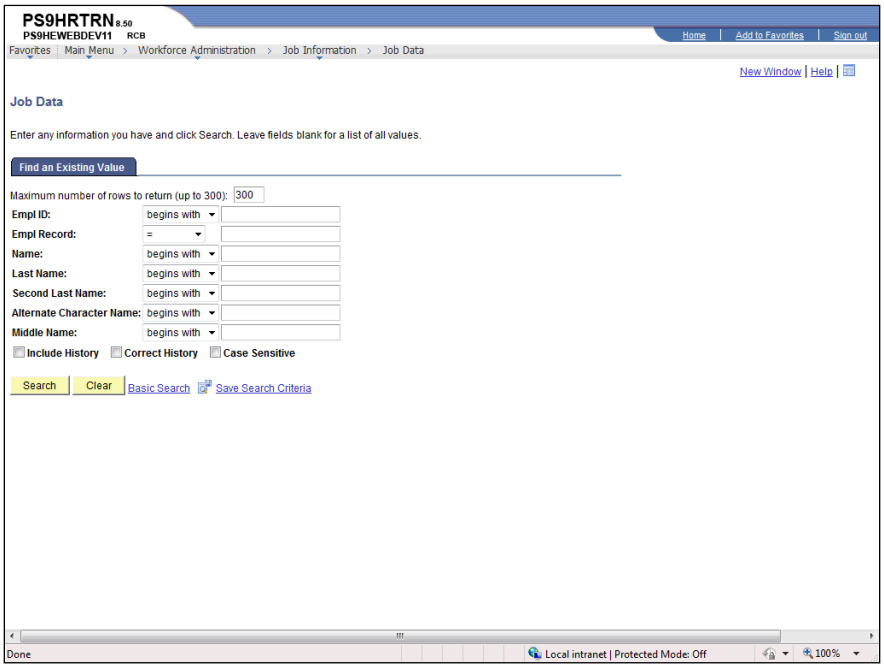
Step	Action
35.	Enter the desired information into the **Department** field. Enter "**EL2058790**".
36.	Even though the Location displays on the page, it must be selected again. Click the **Look up Location** button.
37.	Click the **EKLMC** link.
38.	Click the **Save** button.
39.	This completes **Record a Department Change**. **End of Procedure.**

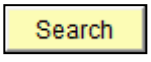
Record a Leave of Absence

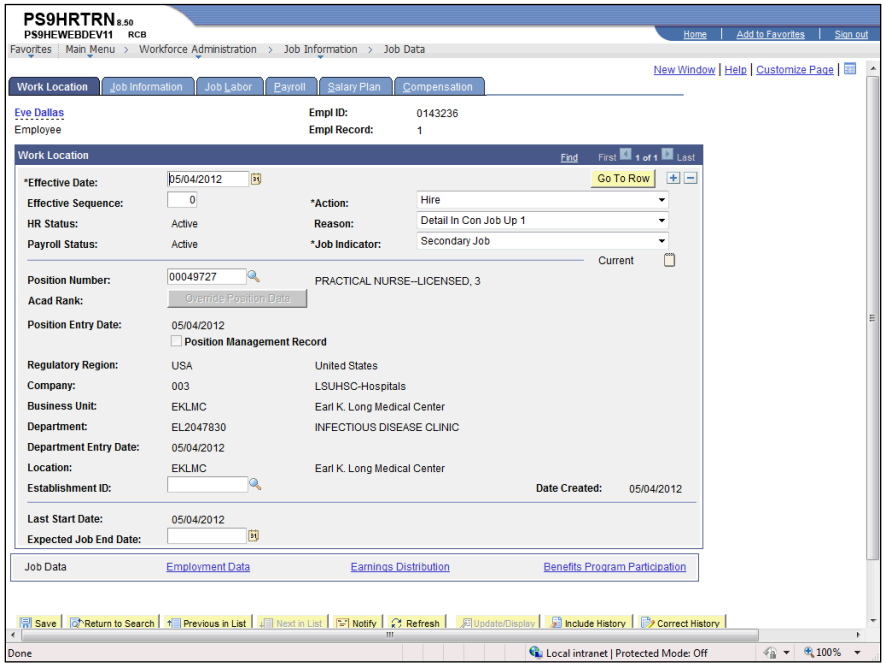
Procedure

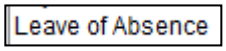
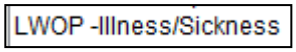
In this topic you will learn how to **Record a Leave of Absence**.

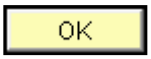
Step	Action
1.	This example begins on the Job Data page. Navigation to the Job Data page is: Main Menu > Workforce Administration > Job Information > Job Data



Step	Action
2.	Enter the desired information into the **Last Name** field. Enter "**dallas**".
3.	Click the **Search** button. 
4.	Click the **appropriate employee** link.
5.	In this exercise Eve Dallas will take a Leave of Absence beginning on 05/05/2012 due to illness.



Step	Action
6.	Click the **Add a new row at row 1** button.
7.	The Effective Date is the date the leave will begin. In this example the Effective Date is 05/05/12. Click the **Choose a date** button.
8.	Click the desired date.
9.	Click the button to the right of the **Action** field.
10.	Click the **Leave of Absence** list item. 
11.	Click the button to the right of the **Reason** field.
12.	Click the **LWOP -Illness/Sickness** list item. 
13.	Click the **Save** button.

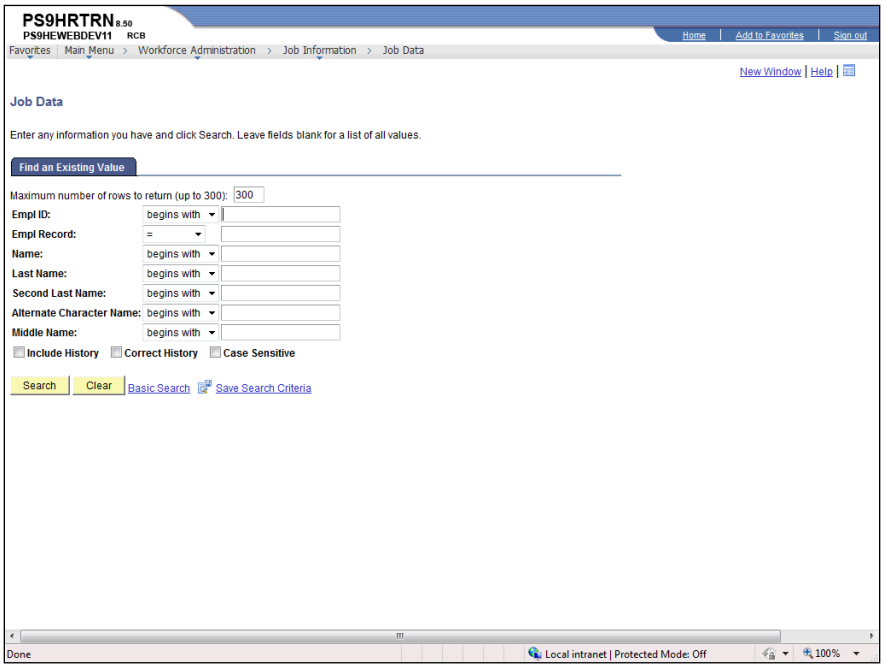
Step	Action
14.	Click the **OK** button. 
15.	This completes **Record a Leave of Absence**. **End of Procedure.**

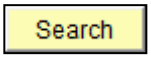
Return from Leave of Absence

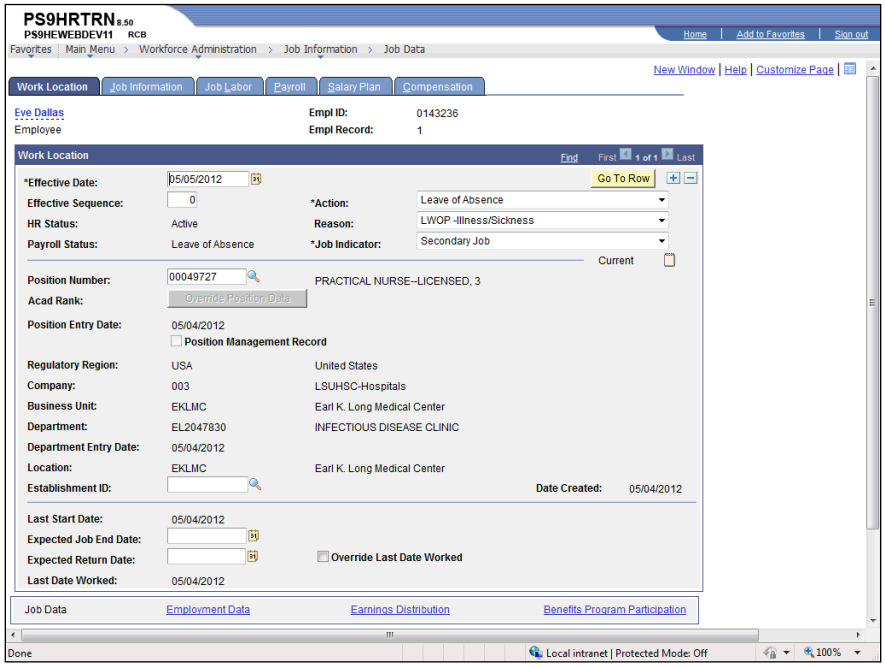
Procedure

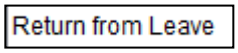
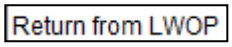
In this topic you will learn how to **Return from Leave of Absence**.

Step	Action
1.	This example begins on the Job Data page. Navigation to the Job Data page is: Main Menu > Workforce Administration > Job Information > Job Data



Step	Action
2.	Enter the desired information into the **Last Name** field. Enter "**dallas**".
3.	Click the **Search** button. 
4.	Click the **appropriate employee** link.



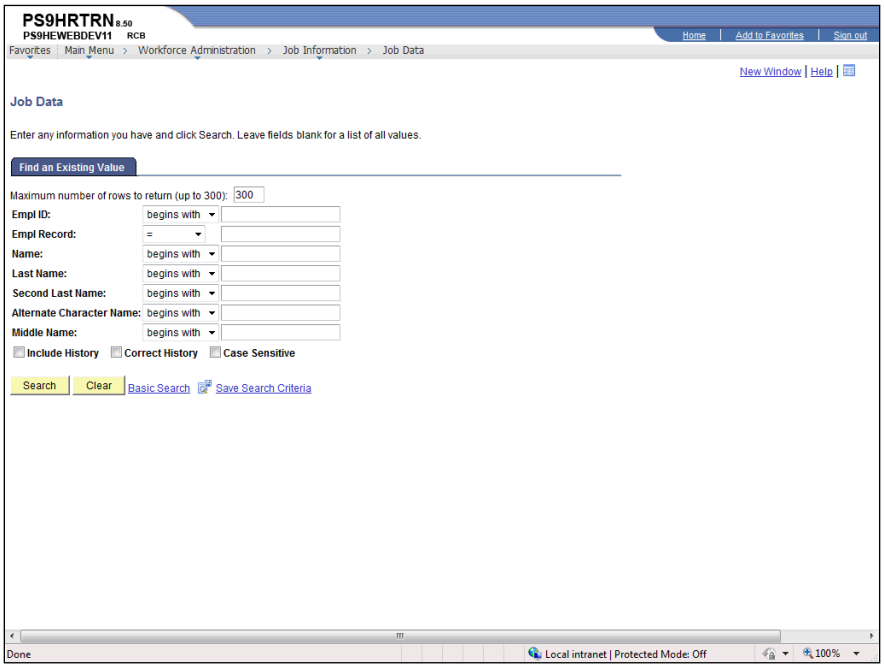
Step	Action
5.	Click the **Add a new row at row 1** button.
6.	Click the **Action** list.
7.	Click the **Return from Leave** list item. 
8.	Click the **Reason** list.
9.	Click the **Return from LWOP** list item. 
10.	Click the **Save** button.
11.	This completes **Return from Leave of Absence**. **End of Procedure.**

Record an Employee Promotion

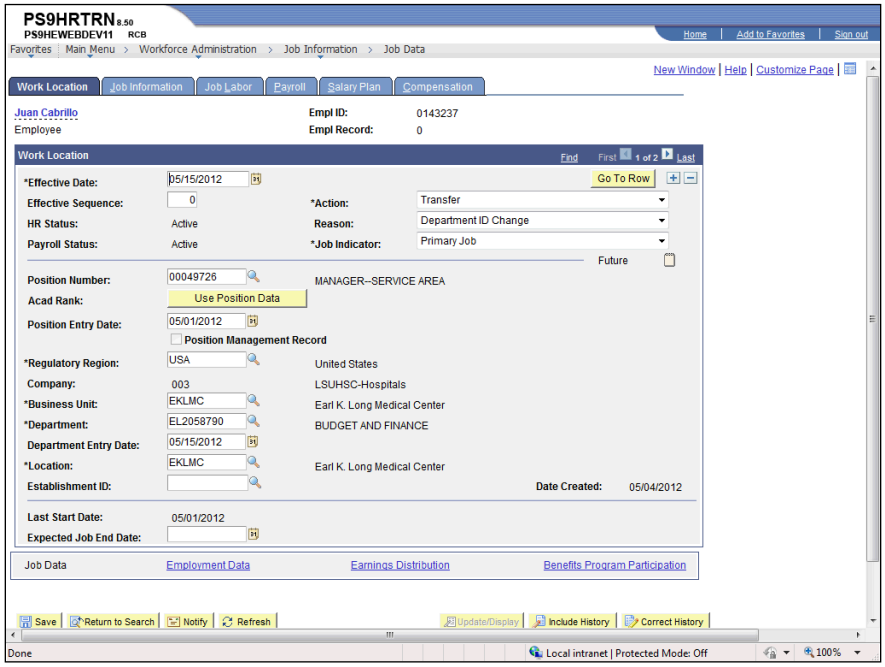
Procedure

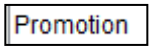
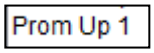
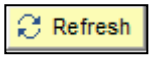
In this topic you will learn how to **Record an Employee Promotion**.

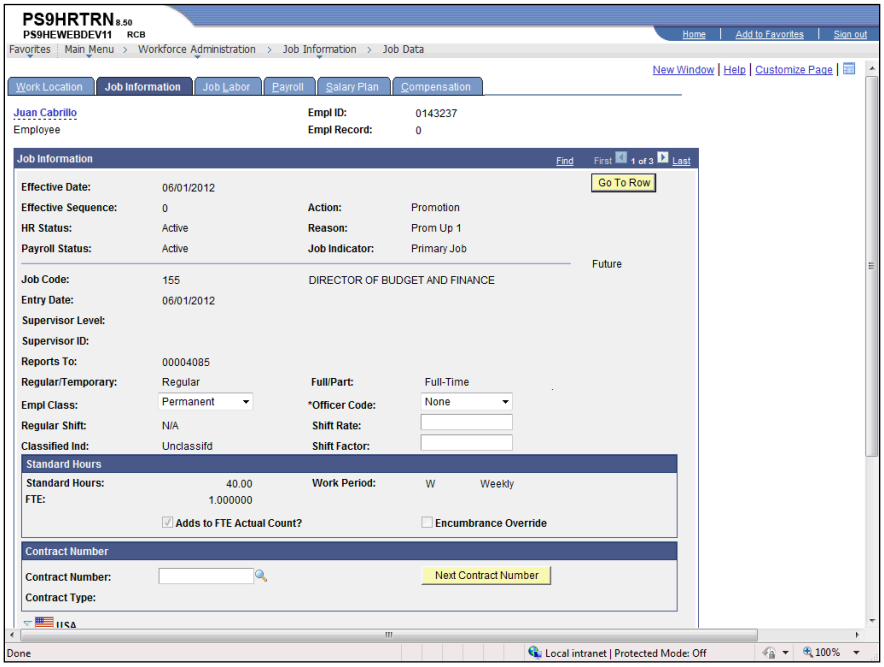
Step	Action
1.	This example begins on the Job Data page. Navigation to the Job Data page is: Main Menu > Workforce Administration > Job Information > Job Data

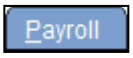


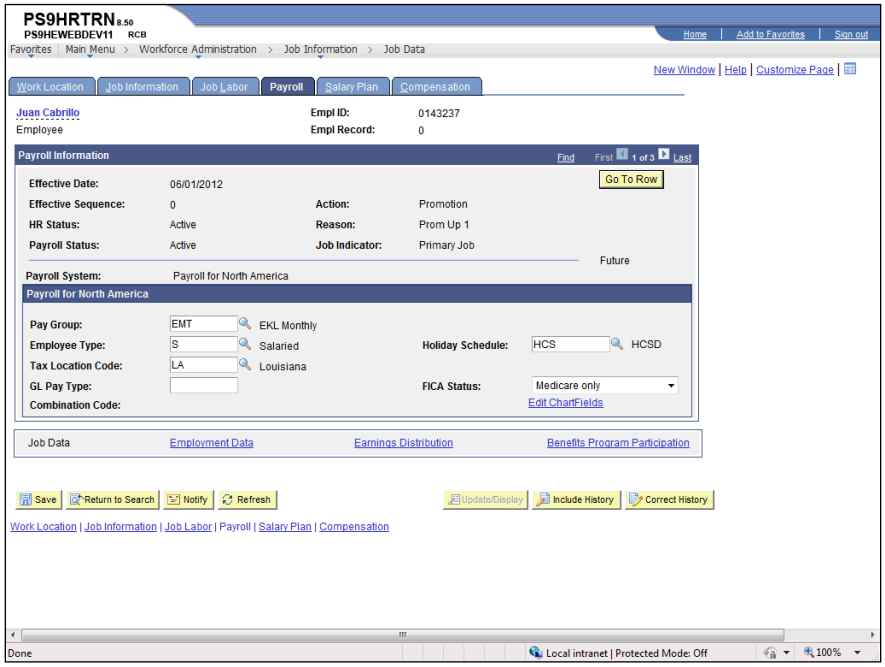
Step	Action
2.	Enter the desired information into the **Last Name** field. Enter "**cabrillo**".
3.	Click the **Search** button.

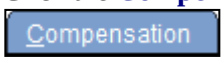


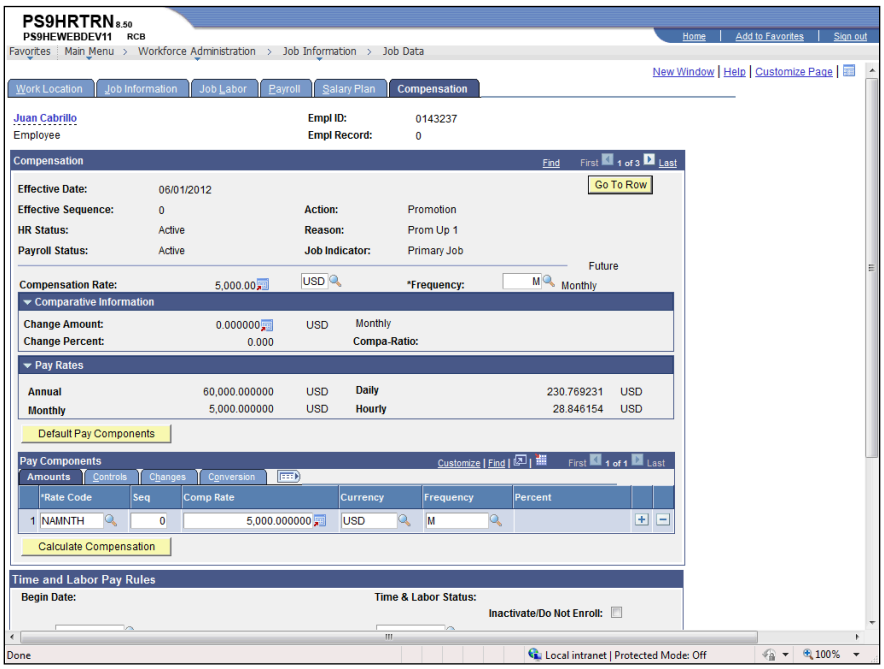
Step	Action
4.	Click the **Add a new row at row 1** button.
5.	Enter the desired information into the **Effective Date** field. Enter "**06/01/2012**".
6.	Click the button to the right of the **Action** field.
7.	Click the **Promotion** list item. 
8.	Click the button to the right of the **Reason** field.
9.	Click the **Prom Up 1** list item. 
10.	Enter the desired information into the **Position Number** field. Enter "**00041335**".
11.	Click the **Refresh** button. 
12.	Click the **Job Information** tab.
13.	Check the Empl Class for appropriate designation. If the designation is incorrect, click the drop-down arrow to the right of the Empl Class field and select it.



Step	Action
14.	Click the **Payroll** tab. 
15.	In this example the Pay Group and Holiday Schedule do not change. However, you will need to verify, and edit if needed, the Pay Group and Holiday Schedule for the new position.



Step	Action
16.	Click the **Compensation** tab. 



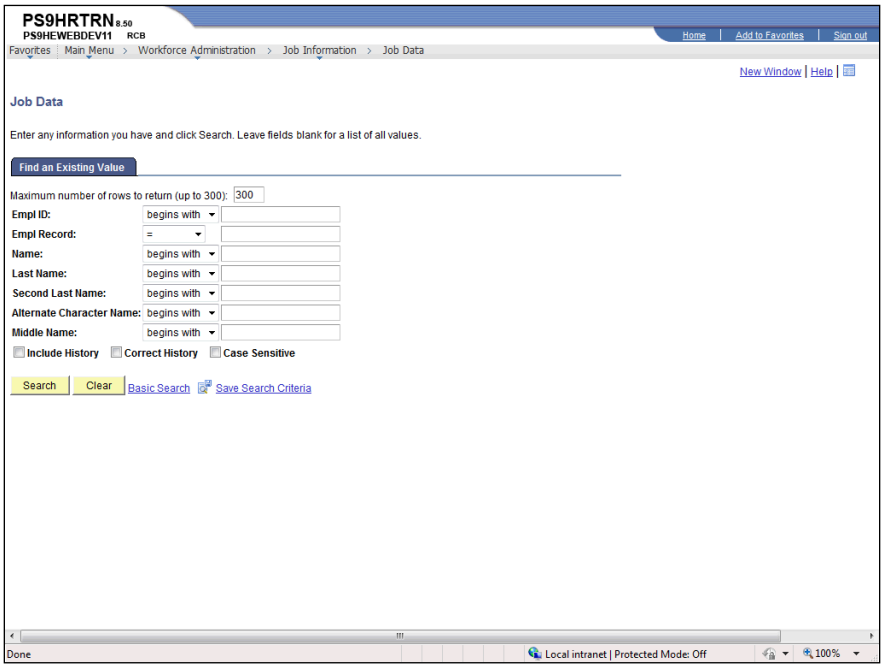
Step	Action
17.	Enter the desired information into the **Comp Rate** field. Enter "**6000.00**".
18.	Click the **Calculate Compensation** button. Calculate Compensation
19.	Click the **Save** button. Save
20.	This complete **Record an Employee Promotion**. **End of Procedure.**

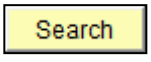
Record a Pay Rate Change

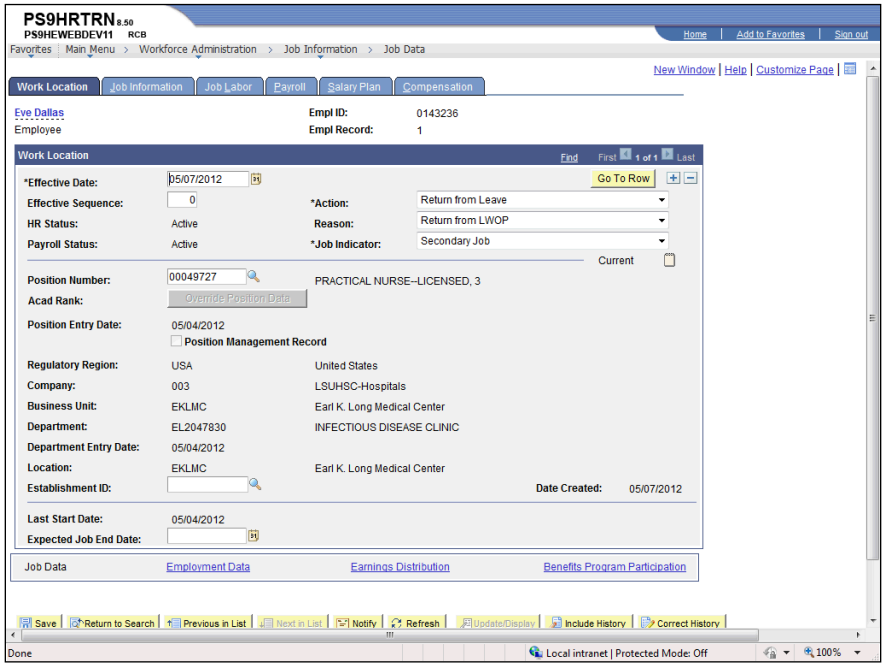
Procedure

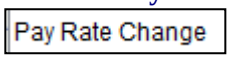
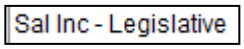
In this topic you will learn how to **Record a Pay Rate Change**.

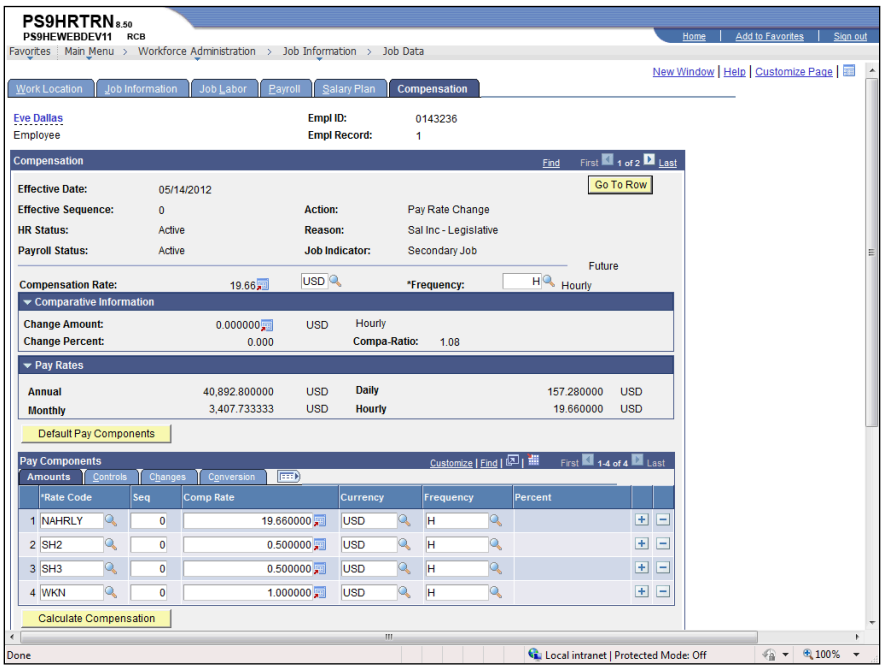
Step	Action
1.	This example begins on the Job Data page. Navigation to the Job Data page is: Main Menu > Workforce Administration > Job Information > Job Data



Step	Action
2.	Enter the desired information into the **Last Name** field. Enter "**dallas**".
3.	Click the **Search** button. 
4.	Click the **appropriate employee** link.



Step	Action
5.	Click the **Add a new row at row 1** button.
6.	Click the **Choose a date** button.
7.	Click the desired date.
8.	Click the **Action** list.
9.	Click the **Pay Rate Change** list item. 
10.	Click the **Reason** list.
11.	Click the **Sal Inc - Legislative** list item. 
12.	Click the **Compensation** tab.
13.	***NOTE: Currently Eve's Compensation Rate is 19.66 and the Change Amount is 0.000000.***



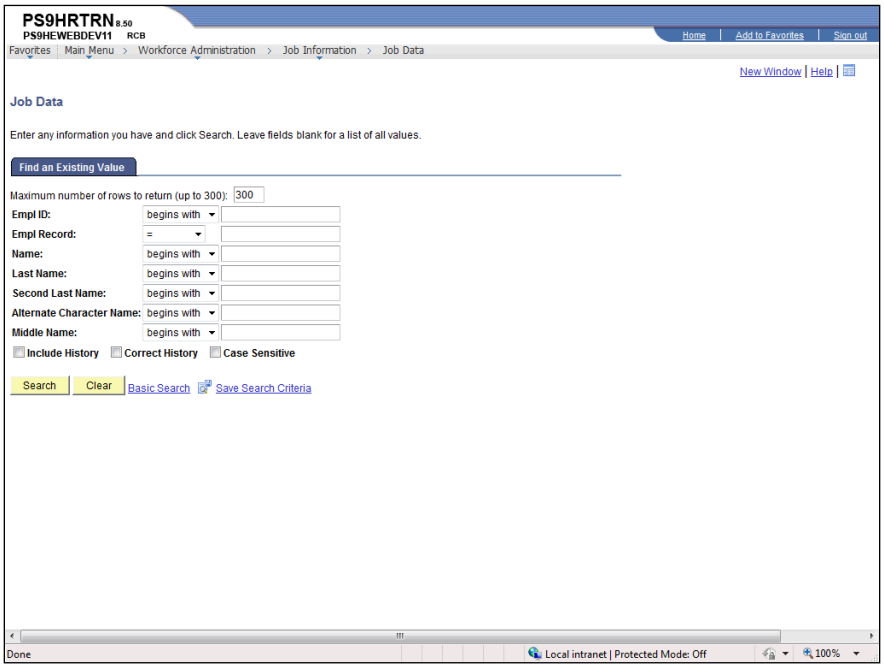
Step	Action
14.	Click the **Changes** tab.
15.	Enter the desired information into the **Change Percent** field. Enter "**4**".
16.	Click the **Calculate Compensation** button.
17.	***NOTE: Eve's Compensation Rate has changed from 19.66 to 20.45. The Change Amount is now 0.786400 instead of 0.000000.***
18.	Click the **Save** button.
19.	This completes **Record a Pay Rate Change**. **End of Procedure.**

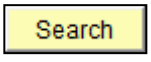
Record an Employee Termination

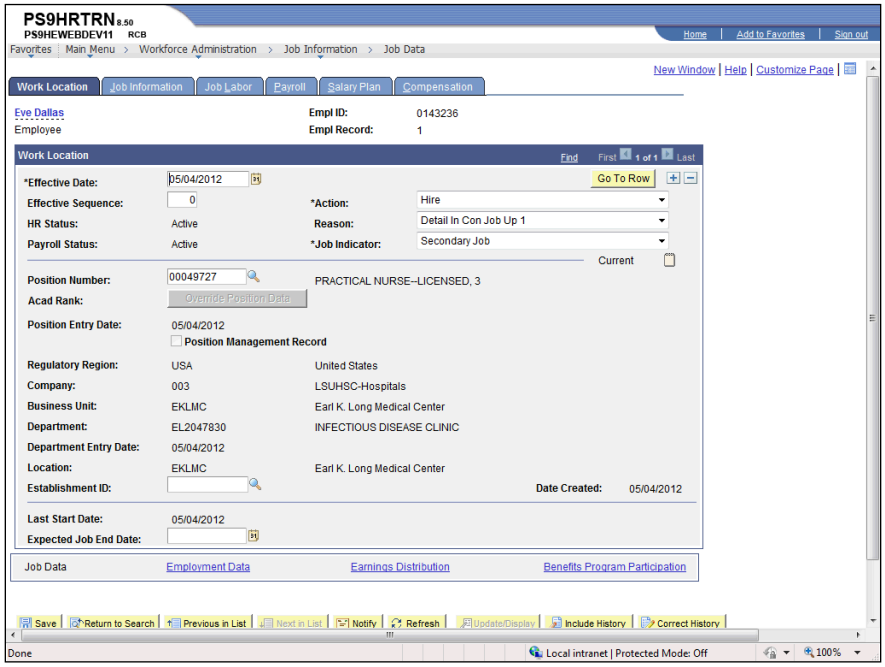
Procedure

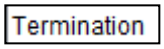
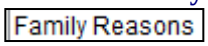
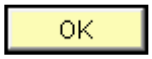
In this topic you will learn how to **Record an Employee Termination**.

Step	Action
1.	This example begins on the Job Data page. Navigation to the Job Data page is: Main Menu > Workforce Administration > Job Information > Job Data



Step	Action
2.	Enter the desired information into the **Last Name** field. Enter "**dallas**".
3.	Click the **Search** button. 
4.	Click the **appropriate employee** link.



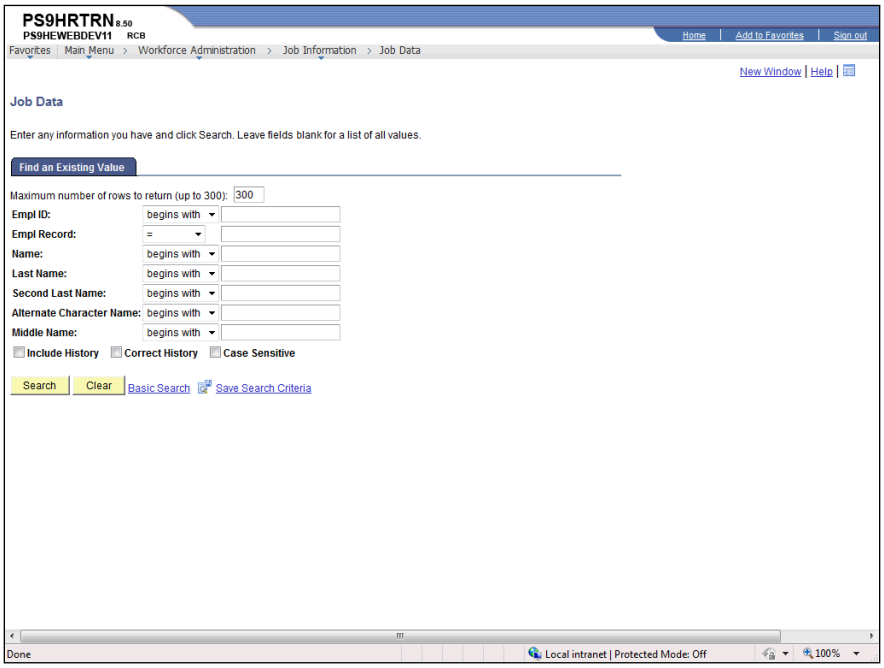
Step	Action
5.	Click the **Add a new row at row 1** button.
6.	The Effective Date defaults to the current date. If the termination date is not the current date, enter the correct termination date in the Effective Date field or select it by clicking the Choose a date (calendar) button.
7.	Click the button to the right of the **Action** field.
8.	Click the **Termination** list item. 
9.	Click the button to the right of the **Reason** field.
10.	Click the **Family Reasons** list item. 
11.	Click the **Save** button.
12.	Click the **OK** button. 
13.	This completes **Record an Employee Termination**. **End of Procedure.**

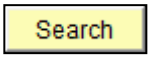
Record an Employee Rehire

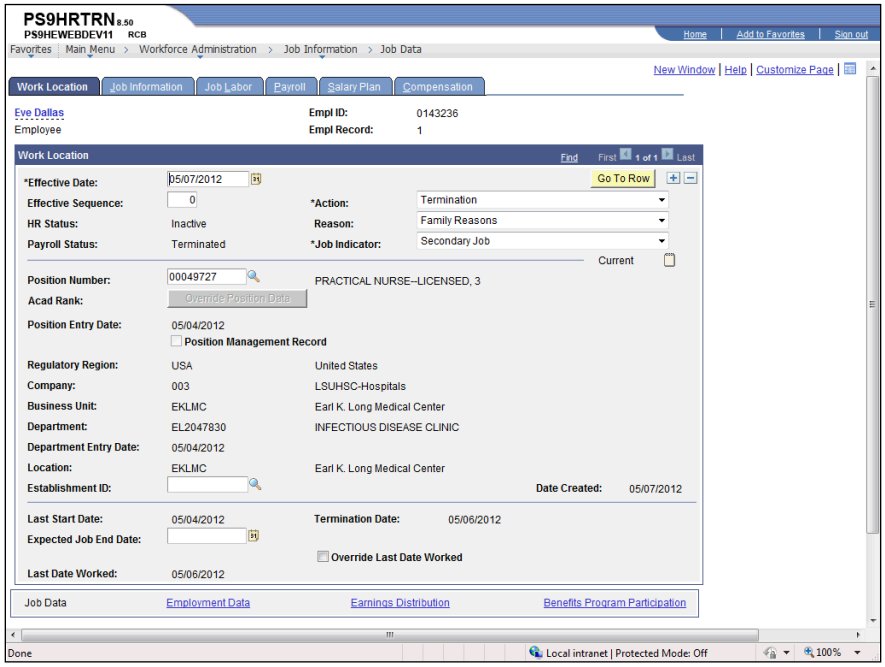
Procedure

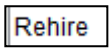
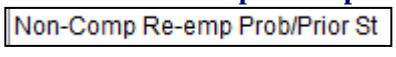
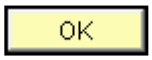
In this topic you will learn how to **Record an Employee Rehire**.

Step	Action
1.	This example begins on the Job Data page. Navigation to the Job Data page is: Main Menu > Workforce Administration > Job Information > Job Data



Step	Action
2.	Enter the desired information into the **Last Name** field. Enter "**dallas**".
3.	Click the **Search** button. 
4.	Click the **appropriate employee** link.



Step	Action
5.	Click the **Add a new row at row 1** button.
6.	Click the **Choose a date** button.
7.	Click the desired date.
8.	Click the button to the right of the **Action** field.
9.	Click the **Rehire** list item. 
10.	Click the button to the right of the **Reason** field.
11.	Click the **Non-Comp Re-emp Prob/Prior St** list item. 
12.	Click the **Save** button.
13.	Click the **OK** button. 

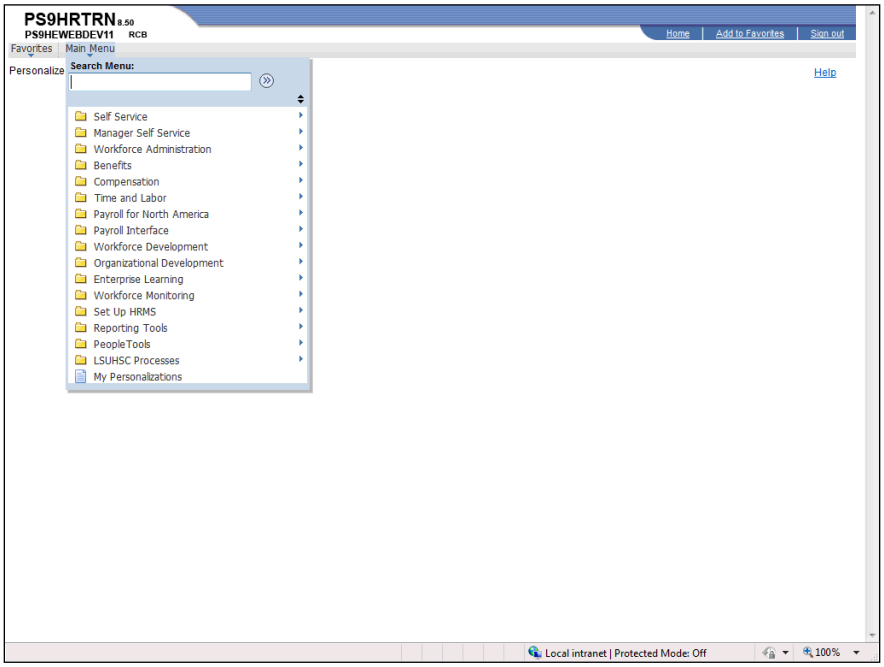
Step	Action
14.	This completes **Record an Employee Rehire**. **End of Procedure.**

View Job Summary Information

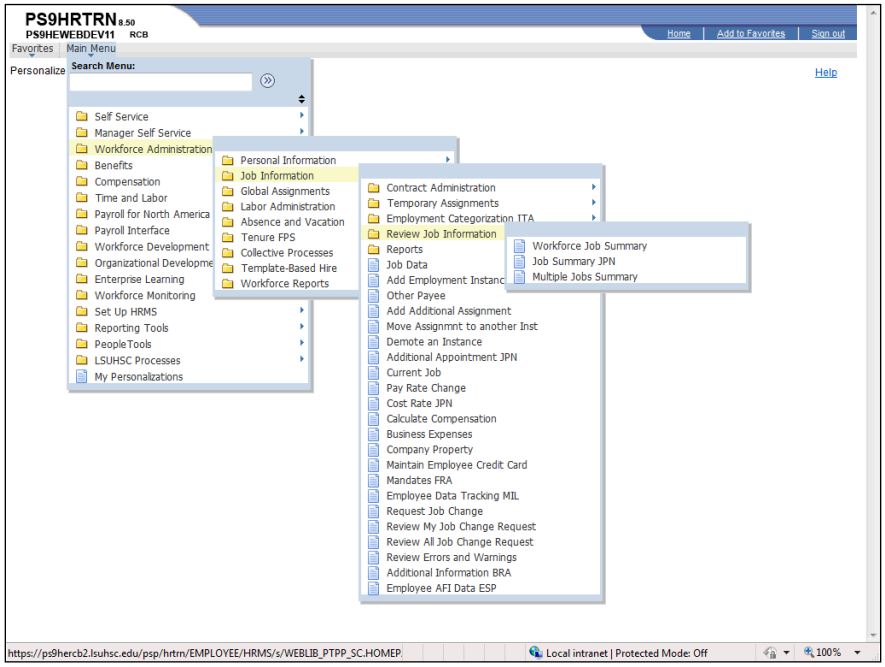
Procedure

In this topic you will learn how to **View Job Summary Information**.

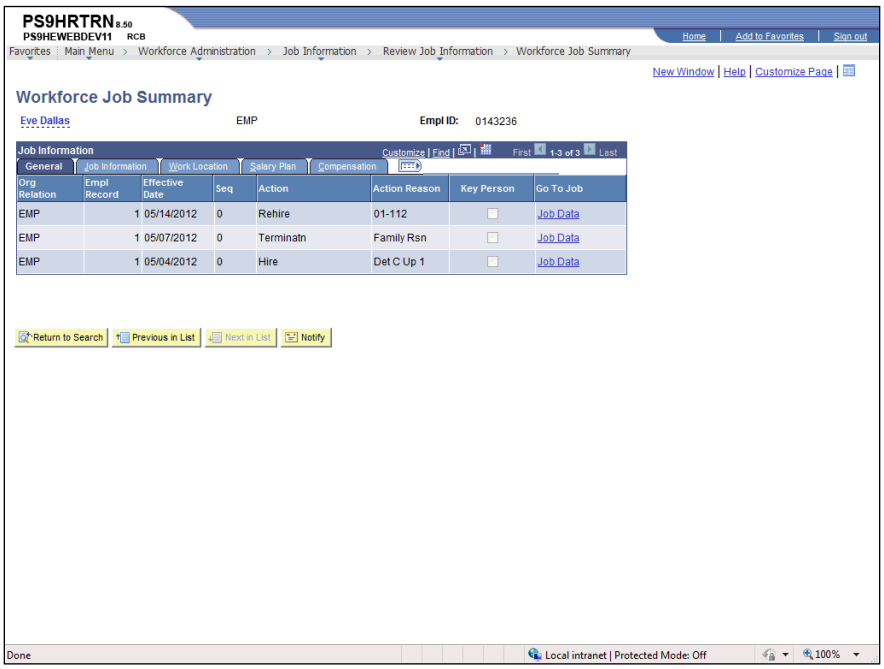
Step	Action
1.	Click the **Main Menu** button.



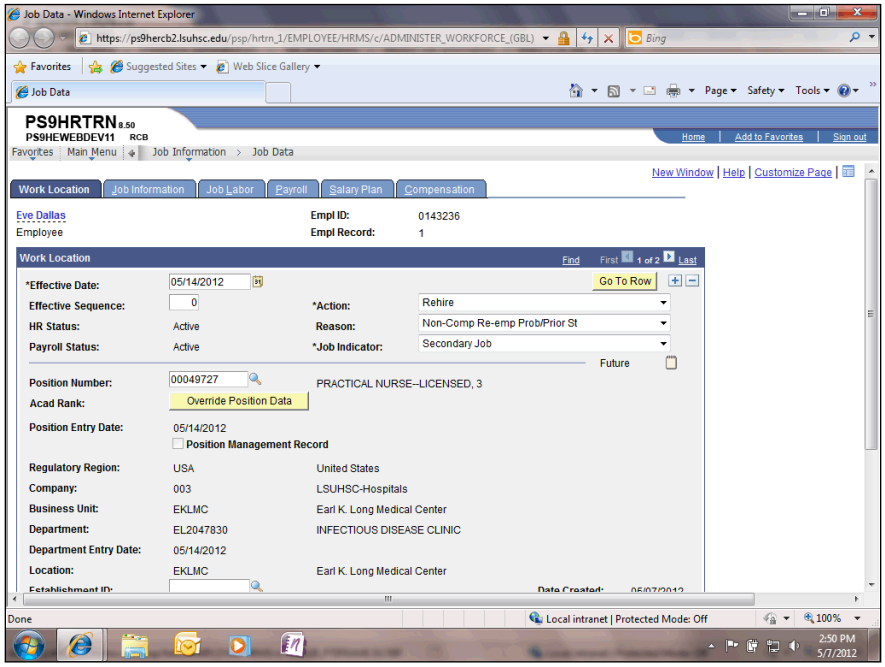
Step	Action
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Point to the **Review Job Information** menu.



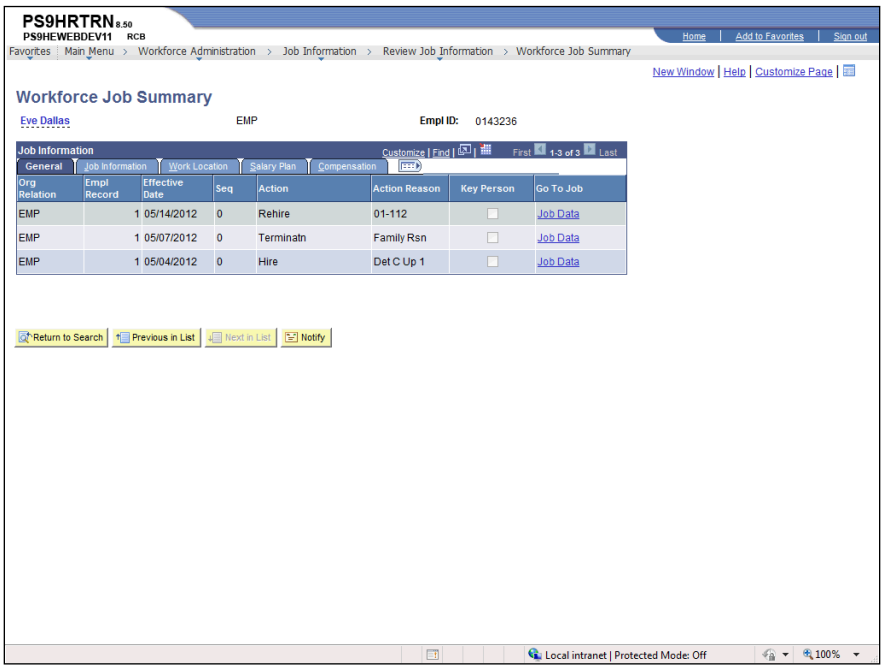
Step	Action
5.	Click the **Workforce Job Summary** link. Workforce Job Summary
6.	Enter the desired information into the **Last Name** field. Enter "**dallas**".
7.	Click the **Search** button. Search
8.	Click the **appropriate employee** link. 0143236

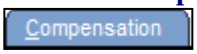


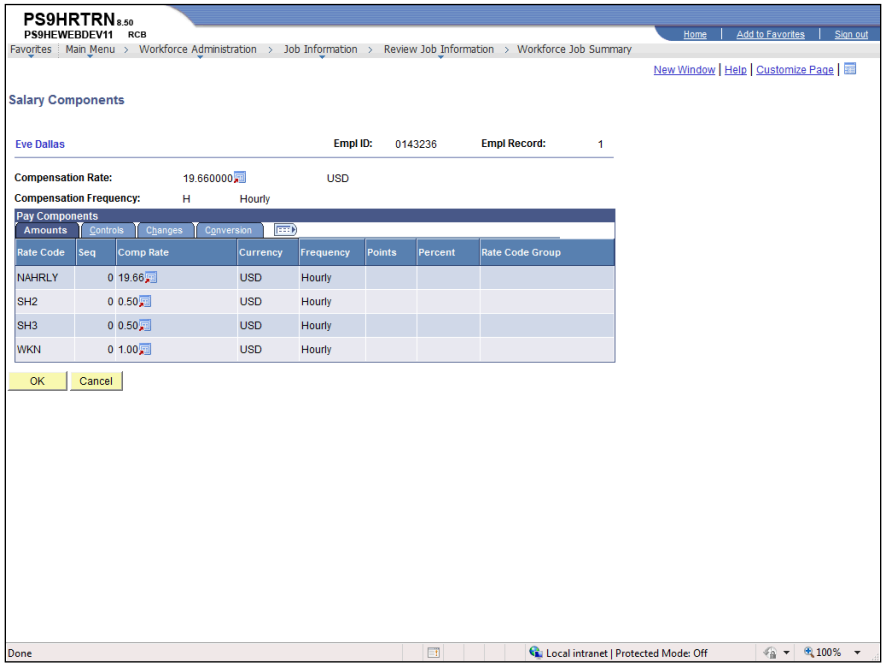
Step	Action
9.	Click the **Job Data** link. ***NOTE: This will open a new window.*** Job Data



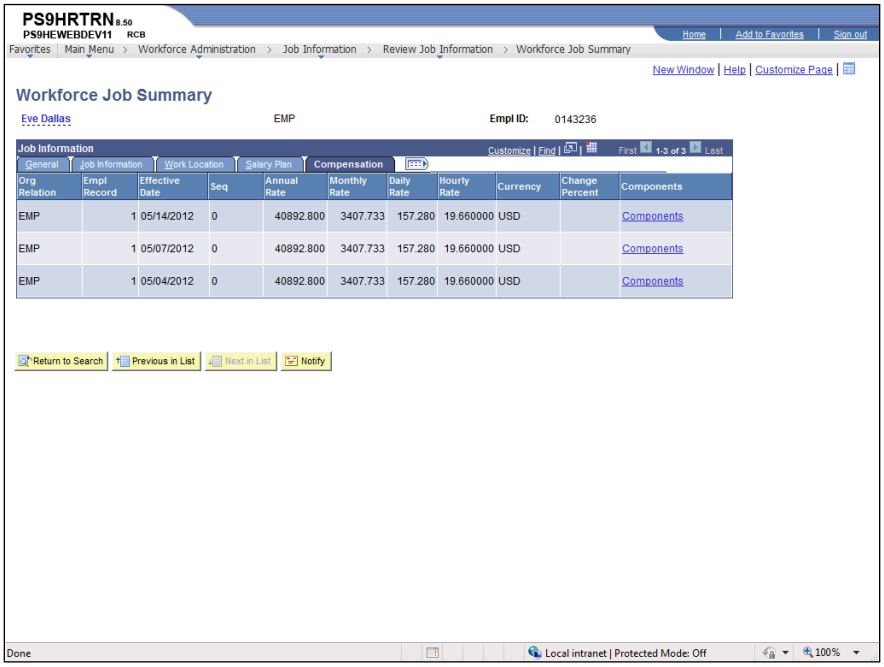
Step	Action
10.	Click the **Close** button.



Step	Action
11.	Click the **Job Information** link.
12.	Click the **Work Location** link.
13.	Click the **Salary Plan** link.
14.	Click the **Compensation** link. 
15.	Click the **Components** link.



Step	Action
16.	Click the **OK** button. OK



Step	Action
17.	Click the **Show all columns** button.
18.	Click the **Show tabs** button.
19.	This completes **View Job Summary Information**. **End of Procedure.**