



Core HCM Admin Guide



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Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from the instance configurations. For example, some fields may be required in this guide that are not required in the instance. Additionally, some of the training topics discussed in this guide may not apply to the organization, but we know we'll find it helpful. If we would like a custom guide for the organization, please contact our training team at learn@camptratech.com.

How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before we begin:

- Any fields with an asterisk are required fields.
- Based on the configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in the instance.
- We may have specific flexfields in the instance that require inputs; this guide is a generic tool and will not include those specific flexfields. We will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, it's important to understand the overall process flow of information in Oracle Cloud for the Core HCM module.



Glossary of Terms

Here we've included common terms associated to the Core HCM module. Please review the terms below to familiarize the customer team with the Oracle Cloud terms used throughout this guide.

НСМ

Abbreviation for Human Capital Management

HCM Data Role

A job role, such as benefits administrator, associated with specified instances of Oracle Fusion Human Capital Management (HCM) data, such as one or more positions or all persons in a department.

Action

Tracks changes to certain Human Capital Management (HCM) records, for example, changes to employment and assignment records. We can create actions and associate them with the predefined action types. We can optionally associate action reasons with actions.

Action Reason

Action reasons provide further explanation to actions, for example, an action of transfer could have reasons such as reorganization or career progression.

Assignment

A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker's or nonworker's role in a legal employer.

Business Unit

A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

Ceiling Step

Highest step within a grade that a worker may progress

Context Segment

The flexfield segment used to store the context value. Each context value can have a different set of context-sensitive segments.

Contingent Worker

A self-employed or agency-supplied worker who is typically a contractor. Contingent worker work relationships with legal employers are typically of

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a specified duration. Any person who has a contingent worker work relationship with a legal employer is a contingent worker

Department

A division of a business enterprise dealing with a particular area of activity.

Division

A business-oriented subdivision within an enterprise. Each division is organized to deliver products and services or address different markets.

Document Records

Document of records provides flexibility to create categories and subcategories to have different classification of the documents. This is stored at employee level.

Effective As-of Date

A date value used for filtering the search results in searches for dateeffective objects. For any object that matches the search criteria, the search results include the physical record that is in effect on the specified effective as-of date.

Employee Self-Service

The ability for an employee to log into Oracle to view or perform actions.

Enterprise

An organization with one or more legal entities under common control.

Flexfield

Grouping of extensible data fields called segments, where each segment is an attribute added to an entity for capturing additional information.

FTE

Full-time equivalent, such as .5 for half-time work.

Grade

A component of the employment model that defines the level of compensation for a worker.

Grade Ladder

A hierarchy used to group grades and define their sequence.

Grade Rate

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Used to define pay values for grades in a legislative data group.

Grade Step

A level of increment within a grade.

Headcount

A work measure recorded on an assignment. By default, the headcount of an organization is the total of primary assignments in primary work relationships.

Job

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

Job Family

A group of jobs that have different but related functions, qualifications, and titles. For example, a trust analyst and an operations analyst may be grouped into the Analyst job family.

Legal Employer

A legal entity that employs people.

Legal Entity

An entity is identified and given rights and responsibilities under commercial law, through the registration with the country's appropriate authority

Legislative Data Group

A means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units.

Line Manager

The direct supervisor of the employee.

Locations

Physical address of a workforce structure.

Manager Self-Service

The ability for a manager to log into Oracle an perform actions on behalf of an employee or approve/reject notifications.

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Nonworker

A person, such as a volunteer or retiree, who is not engaged in the core businesses of the enterprise or legal employer but who may receive payments from a legal employer. Any person who has a nonworker work relationship with a legal employer is a nonworker.

Notifications

A mechanism to provide details on data to users in an approval or FYI process.

Payroll Status

Indicates if the assignment is processed by payroll. The assignment status will provide valid values that contain payroll eligible and non-payroll eligible.

Pending Worker

A person who will be hired or start a contingent worker placement and for whom we create a person record that is effective before the hire or start date.

Person Information

Employees can track and manage their personal information such as Name, Contact Information, Marital Status, etc.

Person Number

A person ID that is unique in the enterprise, is allocated automatically to the person record, and does not change, even if the person leaves and later rejoins the enterprise

Person Record

Employee's demographic data, such as: name, address, marital status, gender, date of birth, etc.

Person Type

A subcategory of a system person type, which the enterprise can define. Person type is specified for a person at the employment-terms or assignment level.

Position

A specific occurrence of one job, fixed within one department, also often one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

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Proposed Worker Type

A pending worker who will become a worker is classified as a type; the proposed worker type is a contingent worker, non-worker, employee, etc.

Reporting Establishment

An organization used in the production of human resources (HR) reports that are required by government agencies.

Security Role

Controls access to application functions and data.

Salary Basis

A set of characteristics associated with a worker's base pay that identifies the payroll details used to pay base earnings, the period of time in which base pay is quoted, the factor used to annualize base pay, any components used to attribute base pay adjustments to different reasons, and any associated grade rate for salary validation.

Work Relationship

An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.

Workflow

An automated process in which tasks are passed from a user, a group of users, or the application to another for consideration or action. The tasks are routed in a logical sequence to achieve an end result.

Day to Day Operations Guide

Workforce Management

Create A Department

Navigation: Home>My Client Groups>Show more from the Quick Actions>Manage Departments>Create>Submit

From the home screen, click My Client Groups

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Scroll down and under **Workforce Structures**, click **Manage Departments**. As a note, we can search **Manage Departments** by clicking Ctrl F

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Next, enter the **Effective State Date**, **Department Set**, **Name**, **and Status**. The effective start date will default to the Oracle recommended start date; it is recommended to use this date. The department set will default; select the department set based on wer configurations; common set is the most commonly used. Enter the department name; we recommend following the same naming

convention of our other departments. The status will default to active. Optionally, we can enter an internal address line, action reason, and an attachment

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Next, enter the **Department Details.** The information needed on this screen will depend on our setups

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On the **Review** screen, scroll down to review the information entered. If we need to update any information, simply click the applicable section from the top

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Once our review is complete, click **Submit.** The department has been created

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Manage Departments

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Search for the **Department Name** and click **Search**

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Next, click **Edit** then **Update**. As a note, if we select **update**, we will update the information as of the effective date entered in the next steps. If we select **correct**, we will correct the existing information as of the existing effective date (in this example, as of 1/1/1951)

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Lastly, update the applicable information, and click Review

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Review the below information. If we need to edit any of the information, click **Back**. Once wer review is complete, click **Submit**. The department details have been updated as of the **Effective Start Date**

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Create A Location

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From the home screen, click My Client Groups

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Scroll down and under **Workforce Structures**, click **Location Details**. As a note, we can search **Location Details** by clicking Ctrl F

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	Candidate Security Profiles	Collective Agreements		Configure Actions	
	Country Security Profiles			600 HCM Exclusion Rules	
Click Location Details	ன / Job Details		(a) Job Requisition Security Profiles	 Legislative Data Group Security Profiles 	
	Cov Location Details	😽 Maintain Areas of Responsibility	😽 Manage Business Units	8 Manage Department Trees	
0 0 0 0 0	ன Manage Departments	Manage Departments - Oracle Search	😽 Manage Disability Organizations	🖓 Manage Divisions	
	👸 Manage Enterprise HCM Information	👷 Manage Grade Ladders	😽 Manage Grade Rates	祝/ Manage Grades	
	Manage Legal Entity HCM	Manage Legal Reporting Unit HCM	😹 Manage Legislative Data Groups	🛷 Manage Organization Trees	
	🚓 Manage Position Trees	Hanage Reporting Establishments	Manage Worker Unions	Organization Security Profiles	
		By Position Details	By Position Details - Oracle Search	Position Security Profiles	
		Request a New Position	Request a Position Change	Request a Position Change - Oracle Search	
	and Role Mappings	Talent Pool Security Profiles	Transaction Security Profiles		

To create a location, click Add

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	Try searching to get results	
	Search by location name, code or city or town.	동네 관리 일에 있는 것 전 문제가 한 것 같아요.

Select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by wer team. Click **Continue**



Enter the information in the When and Why section, then click Continue

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Create Location					Submit Cancel
	When and Why	Enter the belo	winformation		
	*When does this location start? 1/10/24	tig.	Why are you creating this location? Reorganization	v	
		Click Continue	Continue		
	 Location Details 				
	③ Main Address				
	④ Shipping Details				
	5 Additional Info				
	Legislative Info				P

Follow this same process and complete the information in each section. The information needed in each section will depend on wer configurations. We can also edit the information in each section by clicking **Edit**. Once we have added the information in the sections below, click **Submit**. The Location has been created.

= vision	Q. Search for people and actions	
Create Location		Submit Cancel
	① When and Why	Click Submit
	② Location Details	Edit
	 Main Address 	Edit
	Shipping Details	🖉 Edit
	 Additional Info 	Edit
	Legislative Info	
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Manage Locations

Navigation: Home>My Client Groups>Show More from the Quick Actions>Location Details>Search>Edit>Update Information>Submit

From the home screen, click My Client Groups

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Next, click Show More

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	্রিগ "iransfer ঊ Checkin: Tempiates ब्रिश्र Act as Proxy Manac Click Show 1	Workforce adictions	Data Exchange	Communicate	+		
	Show More						

Scroll down and under **Workforce Structures**, click **Location Details**. As a note, we can search **Location Details** by clicking Ctrl F

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N. BERT	Worker Time Entry Profiles	Worker Time Processing Profiles			06.0
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	Candidate Security Profiles	Collective Agreements		Configure Actions	
	Country Security Profiles			680 HCM Exclusion Rules	9 0 0
Click Location Details	殻 Job Details		(a) Job Requisition Security Profiles	Legislative Data Group Security Profiles	0/0/000
	60/ Location Details	Maintain Areas of Responsibility	😽 Manage Business Units	👷 Manage Department Trees	
000000	🔐 Manage Departments	Manage Departments - Oracle Search	😽 Manage Disability Organizations	👷 Manage Divisions	
	Manage Enterprise HCM Information	Manage Grade Ladders	😽 Manage Grade Rates	祝/ Manage Grades	°, 6, 6, 6, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0,
	Manage Legal Entity HCM	Manage Legal Reporting Unit HCM Information	😹 Manage Legislative Data Groups	👸 Manage Organization Trees	0
	👸 Manage Position Trees	Manage Reporting Establishments	🚓 Manage Worker Unions	Organization Security Profiles	
		😽 Position Details	😽 Position Details - Oracle Search	Position Security Profiles	
		Request a New Position	Request a Position Change	Request a Position Change - Oracle Search	
NS NO COL	87 Role Mappings	Talent Pool Security Profiles	Transaction Security Profiles		

Search for the **Location** by entering the **Location Name.** To populate all locations, enter %% and click the **magnifying glass**

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	Locations		+ Add	
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	Location Set Kuwait Location Set	Status Active		
	2nd Floor Abrar Building KWLoc002	2nd Floor Abrar Building Kuvad City 1112 Kuvad		
	Location Set Kuwait Location Set	Status Active		
	2 East HO	2000 Duqueere Avenue		

Select the Location Name

Location Detail	S		Manage in Spreadsh
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	USLoc003	Atlanta, GA 30326	
		Fulton	
		United States	
	Location Set	Status	
	US Location Set	Active	
	Atlanta	3353 Peachtree Rd NE	
	E36005	Atlanta, GA 30326	
	Select Location Name	Fulton	
	Select Location Name	United states	
	Location Set	Status	
	E360 US Location Set	Active	
	Auckland	162 Victoria Street West	
	NZLoc001	Auckland 1010	
		NEW ZEALAND	
	Location Set	Status	
	New Zealand Location Set	Active	
	Av. De Mayo	Av. De Mayo 770	
	AKLOCUUT	Buenos Aires	
		ARGENTINA	
		Association and a second se	
	Location Set	Status	
	Argentina Location Set	Active	the second second second second

Next, click **Actions** then **Update**. As a note, if we select **update**, we will update the information as of the effective date entered in the next steps. If we select **correct**, we will correct the existing information as of the existing effective date (in this example, as of 1/1/1951)

= vision	$\boldsymbol{Q}_{_{\rm c}}$ Search for people and actions	Click Actions	þ ð 👸
K Atlanta			Actions V
Location Details		Click Update	Correct Duplicate
Effective Date 1/1/51 -	Code E360USLOC005		
Action Reason	Status Active		
Location Set E360 US Location Set	Inventory Organization Atlanta		공문법
Name Atlanta			
Description			
Attachments			
Addresses		^	
Main Address			
Address 3353 Peachtree Rd NE	Email		
Atlanta, GA 30326 Fulton United States	Geographic Hierarchy		
Time Zone Code (UTC-05:00) New York	Eastern Time (ET)		

Enter the **Effective Date** then, update the applicable information. Once complete, click **Submit**. The Location Details have been updated as of the **Effective Start Date**.

ision	${\sf Q}_{\sf c}$ Search for people and actions		<u></u>	ЪÔ
Update Location: Atlanta E360USLOC005			Submit	Cance
Location Deta	ls Update the applicat	ole information below		
"Effective Date		Name		
1/10/24	😘 - m/d/yy	Atlanta		
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Al control of the		*Status		
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		Atlanta	×	
Description		1.000		
Attachments				
	Drag files here or click to add attac	hment v		
			······	

Create A Job

Navigation: Home>My Client Groups>Show More from the Quick Actions>Job Details>Add>Enter Information>Submit

From the home screen, click My Client Groups

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Next, click Show More

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	ල් [*] Hire an Employee	සුවූ	M	Æ		Ē,	
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0 ⁰⁰ 0 ° 0	Sy Transfer						000 0
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Scroll down and under **Workforce Structures**, click **Job Details**. As a note, we can search **Job Details** by clicking Ctrl F

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0.000	Workforce Structures				0 0 0
		Approval Transactions	Area of Responsibility Templates	Styl Assignment Statuses	0 0 0 0
	Candidate Security Profiles	Grant Collective Agreements		8 Configure Actions	
	Country Security Profiles			8 HCM Exclusion Rules	
	Staff Job Details	🚀 Job Families	Job Requisition Security Profiles	 Legislative Data Group Security Profiles 	
Click Job Details	8 Location Details	👷 Maintain Areas of Responsibility	👷 Manage Business Units	8 Manage Department Trees	
000000	👷 Manage Departments	Manage Departments - Oracle Search	Manage Disability Organizations	👷 Manage Divisions	
	8 Manage Enterprise HCM Information	8 Manage Grade Ladders	👷 Manage Grade Rates	8 Manage Grades	S 6 6 000
	Manage Legal Entity HCM	Manage Legal Reporting Unit HCM	😽 Manage Legislative Data Groups	👷 Manage Organization Trees	
	👷 Manage Position Trees	Manage Reporting Establishments	Manage Worker Unions	Organization Security Profiles	
		Position Details	8 Position Details - Oracle Search	Position Security Profiles	
		Request a New Position	Request a Position Change	Request a Position Change - Oracle Search	
	8 Role Mappings	Talent Pool Security Profiles	Transaction Security Profiles		

Click Add to create a new Job

= vision	Q Search for people and actions	습 수 며 수 🚦
✓ Job Details		Manage in Spreadsheet
Jobs		+ Add
Search	Q Show Filters Click A	dd
	Try searching to get results	
	Search by job name, code, or job family.	

Select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**



Enter the information in the When and Why section, then click Continue

= vision	Q	Search for people and actions			
Create Job					Submit Cancel
	When and Why	Enterthe	belowinformation		
	"When does the job start? 1/10/24	ii a	Why are you creating this job? Reorganization	~	
		lick Continue	Continue		
	Job Details				
	③ Additional Info				
	④ Legislative Info				
	(5) Associated Profiles				

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. We can also edit the information in each section by clicking **Edit**. Once we have added the information in the sections below, click **Submit**. The Job has been created.

= vision	${f Q}$. Search for people and actions	
Create Job		Submit Cancel
	① When and Why	Click Submit
	 Job Details 	🖉 Edit
	③ Additional Info	✓ Edit
	Legislative Info	
	Switzerland Job Details	
	Position Type Position Type	
	Overrime Status Standard Occupational Classification Exempt EE0-1 Category EE0-4 Category EE0-4 Category	—

Manage Jobs

Navigation: Home>My Client Groups>Show More from the Quick Actions>Job Details>Search>Edit>Update Information>Submit

From the home screen, click My Client Groups

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	at as Proxy Manager	Workforce Predictions					
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Next, click Show More

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0,000	변 Change Manager	1 0%	ති	\bigcirc			
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Show More							
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Scroll down and under **Workforce Structures**, click **Job Details**. As a note, we can search **Job Details** by clicking Ctrl F

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R. BREEF	Worker Time Entry Profiles	Worker Time Processing Profiles			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
-0.00	Workforce Structures				0 000
		Approval Transactions	Area of Responsibility Templates	Assignment Statuses	
	Candidate Security Profiles	Collective Agreements	🛃 Compare	Styl Configure Actions	
	Country Security Profiles	Data Roles and Security Profiles		HCM Exclusion Rules	
	Job Details		Job Requisition Security Profiles	 Legislative Data Group Security Profiles 	
Click Job Details	50 Location Details	Anintain Areas of Responsibility	Manage Business Units	Manage Department Trees	
0000000	8 Manage Departments	8 Manage Departments - Oracle Search	👸 Manage Disability Organizations	8 Manage Divisions	
	Manage Enterprise HCM Information	Manage Grade Ladders	😽 Manage Grade Rates	8 Manage Grades	10°
0°°0 0 0	Manage Legal Entity HCM Information	Hanage Legal Reporting Unit HCM	Manage Legislative Data Groups	Manage Organization Trees	
	8 Manage Position Trees	👸 Manage Reporting Establishments	👸 Manage Worker Unions	Organization Security Profiles	
		Position Details	Rosition Details - Oracle Search		
		Request a New Position	Request a Position Change	n Request a Position Change - Oracle	
	are Mappings	Talent Pool Security Profiles	Transaction Security Profiles		

Search for the **Job** by entering the **Job Name.** To populate all jobs, enter %% and click the **magnifying glass**

= vision	Q Search for pe			습 🌣 Þ 수 🔋
✓ Job Details				Manage in Spreadsheet
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	%% × 🤇 Show Filters	Effective As-of Date On or after 1/10/24 Status Active X	Cort Bu Joh Mamo & to 7	
	Account Executive JO8052		JOD Hame - A to 2	
	Job Set Commercial Job Set Status	Job Family Sales		
	Active Account Executive E360US/08001			
	Job Set E360 US Job Set	Job Family Sales		
Status Active Accountan	Active Accountant			
	JO8001 Job Set Common Set	Job Family Accounting		
	Status Active			
	Accounting Clerk JO8016			

Select the Job Name

= vision	Q Search for people and actions	
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		Sort By Job Name - A to Z
Account Beau 30802 Job Set Commercial Job Status Active	Select Job Name Job Family Set Sates	
Account Execut E360US/B001 Job Set E360 US Job Se Status Active	Job Family t Sales	
Accountant Job 54 Common Set Satus Active	Job Family Accounting	
Accounting Cle JOB016	rk	

Next, click **Actions** then **Update.** As a note, if we select **update**, we will update the information as of the effective date entered in the next steps. If we select **correct**, we will correct the existing information as of the existing effective date (in this example, as of 1/1/1951)

= vision		${\bf Q}$. Search for people and actions	Click Actio	ດ ☆ 멷 우 🔋
< Account Executi	ve			Actions V Updale
	Job Details		Click	Update Correct Duplicate Create Profile
	Effective Date 1/1/51 - Action Reason Job Set Commercial Job Set Name Account Executive Code JOB052 Attachments	Job Family Sales Sutur Active Job Function Administrative Progression Job Requisition Template		
	Grades Valid Grades		^	
		There's nothing here so far.		P

Enter the **Effective Date** then, update the applicable information. Once complete, click **Submit**. The Job Details have been updated as of the **Effective Start Date**

= vision	${\bf Q}_{\rm c}$ Search for people and actions			_□☆┍ҫ 🔮
Update Job: Account Executive				Submit Cancel
Job Details	Update the applical	ole information below		
*Effective Date		Job Family		
1/10/24	📬 - m/d/yy 👸	Sales	×	
Action Reason		* Status		
	~	Active	×	
*Job Set		Job Function		
Commercial Job Set		Administrative	~	
"Name		Progression Job		
Account Executive		Select a value	×	
*Code		Requisition Template		
JOB052		Select a value	×	
Attachments				
	Drag files here or click to add attain	chment v		

Create A Grade

Navigation: Home>My Client Groups>Show More from the Quick Actions>Manage Grades>Create>Enter Information>Submit

Image: Working House

Image: Working

From the home screen, click My Client Groups

Next, click Show More

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	Show More						

Scroll down and under **Workforce Structures**, click **Manage Grades**. As a note, we can search **Manage Grades** by clicking Ctrl F

= vision				< ○ ☆ 中 ⊕ []
	Action Reasons	Approval Transactions	Area of Responsibility Templates	By Assignment Statuses
000	Candidate Security Profiles	otiective Agreements	🛃 Compare	Ref Configure Actions
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0 000 0 0 0 0	Manage Enterprise HCM Information	😽 Manage Grade Ladders	Manage Grade Rates	oot Manage Grades
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10 ⁰ 0 0	Manage Position Trees	😽 Manage Reporting Establishments	Manage Worker Unions	Organization Security Profiles
	Person Security Profiles	8 Position Details	Resition Details - Oracle Search	Position Security Profiles
		8 Request a New Position	Request a Position Change	0 Request a Position Change - Oracle
Sector and	🖧 Role Mappings	Talent Pool Security Profiles	Transaction Security Profiles	
	Add Anytime Document	Add to Succession Plan	(12) Add to Talent Pool	🔄 Channels

To create a Grade, click **Create**

= vision	Q Search for people and actions		습 🌣 🖻 🗘 🚦
✓ Manage Grades			
▲ Search			Advanced Saved Search Active Grades
** Name ** Code Status Active		Grade Set	Search Reset Save
A Search Results ⑦ Vew ← Format ♥	readsheet	▲マ Code	Grade Set Status Pending Changes
No search conducted.			

Next, enter the **Effective State Date**, **Grade Set**, **Name**, **Code and Status**. The effective start date will default to the Oracle recommended start date; it is recommended to use this date. The grade set will default; select the grade set based on our configurations; common set is the most commonly used. Enter the grade name; we recommend following the same naming convention of our other grades. Next, enter the grade code; we recommend following the same naming to active. Optionally, we can enter an action reason, and an attachment

= vision	${\sf Q}_{\sf S}$ Search for people and actions		🖸 주 Þ ĉ 👸
	(1) − (2) − (3) − (3) Grade Grade Grade Rokew Details Steps Rates		
Create Grade: Grade Details		Back Ne <u>xt</u> Save V	Sub <u>m</u> it <u>C</u> ancel
▲ Grade Details [®]	Enter the below information		
*Effective Start Date 17//51 *Grade Set Common Set *Name Executive 22 *Code EXEC_22		*Status Active Action Reson Reorganization Context Attachments None +	`
Grade: Legislative Information			
Grade Code Description Uniformed grade Industrial grade Paypoint Code	×		
	~		
			

Once the information has been entered, click Next
= vision	${\sf Q}_{\sf c}$ Search for people and actions	C C	フ 🌣 白 仓 👸
	1) - 2) - 3) - 4) Grade Grade Review		
Create Grade: Grade Details	Detali Shipi Rates	Back Negt Save V Su	b <u>m</u> it <u>C</u> ancel
▲ Grade Details ®		Click Next	
"Effective Start Date 1//51 62 "Grade Set Common Set Executive 32 "Name Executive 32 Executive 32		*Status Active V Action Reson Reorganization V Context V	
*Code EXEC_22		Attachments None 🕂	
4 UK MyCSP Information			
Grade Code Description Uniformed grade Industrial grade Paypoint Code	×.		
England School Workforce Census Information			
Pay Range	v		

Next, enter the **Grade Steps.** The information needed on this screen will depend on our setups. If we have steps associated with grades, we can add those here by selecting **Add Row,** if applicable. If we do not use grade steps, please click **Next**

= vision	${\sf Q}_{\sf c}$ Search for people and actions		() 주 너 한 🔮
	Q→→Q = 3 = 4 Grade Grade Beview	Click Next	
Create Grade: Grade Steps	Detailo Stepo Rates	Back Negt Save	▼ Sub <u>m</u> it <u>C</u> ancel
Effective Start Date 1/1/51 Grade Set Common Set		Name Executive 22 Code EXEC_22	
✓ Grade Steps ^⑦ View ▼ Format ▼			
*Step Number *Step Name No data to display. Click Add Row	Ceiling Step		

First, ensure the correct Legislative Data Group is displayed; if not, use the drop down to select the correct Legislative Data Group. Next, enter the Grade Rates. The information needed on this screen will depend on our setups. If we have rates created and we'd like to associate those rates with grades, we can add those here by selecting Add Existing Rate. If have not previously created a grade rate, click Create New Rate. If we do not use grade steps, please click Next

= vision	${f Q}_{}$. Search for people and actions		() 수 다 수 🔋
	Q→Q→3 - 3 Grade Grade Review Churde State	Click Next	
Create Grade: Grade Rates	vca#J Jicy* nako	Back Negt Save	▼ Sub <u>m</u> it <u>C</u> ancel
Effective Start Date 1/1/51		Name Executive 22	
Grade Set Common Set		Code EXEC_22	
	islative Data Group		
Legislative Data Group US Legislative Data Group View ▼ Format ▼ + Add Existing Rate + Create New Rate X Remove			
* Grade Rate		Currency Minimum Maximum Midpoint	Value Grades
No data to display. Columns Hidden 3 Click Add or Create			
	승규는 것은 것은 것은 것은 것은 것을 것을 것을 했다.	방법과 화가지 않는 것이 없는 것입니 것 같아.	
		요즘 사람이 많은 것이 같아. 밥 좀 많을 수 없어요.	

On the **Review** screen, scroll down to review the information entered. If we need to update any information, simply click the applicable section from the top

= vision	Q Search for people a	and actions		습 후 ㅁ 후 🔋
Create Grade: Review ⁴ Details	Click to Edit Click to Edit Review	Core Code Code Reiver	table Page Back Negt Status Active	Swe V Salagit Concel
	Grade Set Common Set Name Executive 22 Code EXEC_22		Action Reason Reorganization Context Attachments None	
Grade: Legislative Information				
▲ UK MyCSP Information				
Grade Code Description Industrial grade —	Uniformed grade — Paypoint Code			
England School Workforce	e Census Information			
Pay Range				
Comments		▲ Attachments		
No data to display.		No data to display.		P

Once our review is complete, click **Submit.** The Grade has been created.

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	Craste Grade Review	
Create Grade: Review	Details steps nades	e Back Negt Save T Submit Cancel
Details		Click Submit
Effective Start Date 1/1/51 Grade Set Common Set Name Executive 22 Code INEC 22		Status Active Action Resons Recignitization Context Attachments None
Grade: Legislative Information		
▲ UK MyCSP Information		
Grade Code Description Uniformed grade Industrial grade — Paypoint Code	-	
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Manage Grades

Navigation: Home>My Client Groups>Show More from the Quick Actions>Manage Grades>Search>Update Information>Submit

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From the home screen, click My Client Groups

Next, click Show More

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Scroll down and under **Workforce Structures**, click **Manage Grades**. As a note, we can search **Manage Grades** by clicking Ctrl F

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a dia 197	🛱 Action Reasons	Approval Transactions	Area of Responsibility Templates	By Assignment Statuses
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	and Job Details	😽 Job Families	Job Requisition Security Profiles	Legislative Data Group Security Profiles
	and Location Details	👸 Maintain Areas of Responsibility	👸 Manage Business Units	👷 Manage Department Trees
	ன Manage Departments	Manage Departments - Oracle Search	Manage Disability Organizations	続/ Manage Divisions
	👸 Manage Enterprise HCM Information	ggy Manage Grade Ladders	👷 Manage Grade Rates	战/ Manage Grades
	Manage Legal Entity HCM	Manage Legal Reporting Unit HCM	👹 Manage Legislative Data Groups	Manage Organization Trees
0000	🖓 Manage Position Trees	👷 Manage Reporting Establishments	🚽 Manage Worker Unions	Organization Security Profiles
	Person Security Profiles	😽 Position Details	By Position Details - Oracle Search	Position Security Profiles
		Request a New Position	Request a Position Change	D, Request a Position Change - Oracle 500 Search
Towners of the second second	👸 Role Mappings	Talent Pool Security Profiles	Transaction Security Profiles	
	Add Anytime Document	Add to Succession Plan	Add to Talent Pool	🗟 Channels

To manage a grade, enter the grade Name and click Search

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Kanage Grades				
Search Enter Grade N	lame		Advanced Saved Search	Active Grades V ** At least one is required
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Select the Grade Name

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✓ Search Results ⑦				Search	Reset Save
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Admin02		ADMIN02	Common Set	Active	No
Select Grade Name					

To update the Grade Details, click Edit and Update

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Grade: Admino2 - ADMINo2 ©			Dene
Effective Start Date 1/1/51 Effective End Date		Grade Set Common Set Action Reason	
Grade Details Rate Values			Click Edit
A Basic Details Effective Start Date 1/1/51 Effective End Date		Grade Set Common Set Action Reason	Edit View History
▲ Grade Details			Delete Record
Name Admin02 Code ADMIN02 Status Active		Context Attachments None	
▲ Grade Step Details			
View • Format • + Add Row 💥 Remove			
*Step Number *Step Name No data to display.	Ceiling Step		
Columns Hidden 1			
Grade: Legislative Information			
▲ UK MyCSP Information			_
Grade Code Description Uniformed grad	e _		20
Industrial grade Paynoint Cod	e		

Enter the Effective Start Date, Action Reason, if applicable, and Click OK

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Effective End Date	b	Grade Set Common Set Action Reason	
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▲ Grade Details		* Effective Start Date 1/10/24	
	Name Admin02	Action Reason Context	
	Status Active	OK Cancel Attachments None	
▲ Grade Step Details		Click OK	
View View			
* Step Number * Step Name		Ceiling Step	
Columns Hidden 1			
Grade: Legislative Information			
 UK MyCSP Information 			_
Grade Code Description	Uniformed grade		50
Industrial orade	Pavpoint Code		

Here we can make the applicable updates and click Review

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Edit Grade: Admino2 - ADMINo2 🛛	Back Review Save V	Sub <u>m</u> it <u>C</u> ancel
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Grade Details *Name Admin02 *Code ADMIN02 *Status Active	Context v Attachments None 4	
"Step Number "Step Name No data to display.	Ceiling Step	
Grade: Legislative Information - UK MyCSP Information		F

From the **Review Screen**, we can review the updated information and click **Submit**

= vision		Q Search for people and actions	
Review Grade:	Admino2 - ADMI	No2	Printable Page Back Review Save Submit Cancel
	Effective Start Date 1/10/24 Effective End Date		Grade Set Common Set Click Submit
▲ Grade Details	Review the updat	ed information below	
Attribute	Current Value	Proposed Value	
Status	Active	Inactive	
Grade : Legislative Inf	formation		
4 UK MyCSP Inform	mation		
Attribute	Current Value	Proposed Value	
Industrial grade		Ν	
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Create Grade Rates

Navigation: Home>My Client Groups>Show More from the Quick Actions>Manage Grade Rates>Create>Enter Information>Submit

From the home screen, click My Client Groups

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Next, click Show More

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0	砂 Transfer 語 Checklist Templates 級 Act as Proxy Manac <mark>Click Show M</mark>	Workforce adictions	Data Exchange	Communicate	+		
	Show Mare						

Scroll down and under **Workforce Structures**, click **Manage Grade Rates**. As a note, we can search **Manage Grade Rates** by clicking Ctrl F

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000000		Approval Transactions	Area of Responsibility Templates	Assignment Statuses	0 0 0 0 0
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	🚓 Job Details	8 Job Families	Job Requisition Security Profiles	Legislative Data Group Security Profiles	0/0/000
	of Location Details	Maintain Areas of Responsibility	😹 Manage Business Units	Manage Department Trees	
	A Manage Departments	637 Manage Departments - Oracle Search	Manage Disability Organizations	Styl Manage Divisions	
	Manage Enterprise HCM Information	Manage Grade Ladders	Manage Grade Rates	😽 Manage Grades	
0 ^{°° 0} 0 ° 0	Manage Legal Entity HCM Information	Manage Legal Reporting Unit HCM Information	🖓 Manage Legislative Data Group Cli	ick Manage Grade Rates	Carl Constant
	🛱 Manage Position Trees	👸 Manage Reporting Establishments	Manage Worker Unions	Organization Security Profiles	
		8 Position Details	Rosition Details - Oracle Search		
		Request a New Position	Request a Position Change	Request a Position Change - Oracle	
	Role Mappings		Transaction Security Profiles		P

Click Create

	Agvancer	Saved Search Active Grade Rates
Status	× Active v	An reast one to required
Effective As of Date	m/d/yy 🛯 🖗	Search Reset Save
dsheet		Bonding
Legisistive Data Group	Rate Type G	rades Status Pending Changes
	dheet	Advances

Enter the Legislative Data Group using the assistive search. Click OK

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Manage Grade Rates		
∡ Search		Advanced Saved Search Active Grade Rates
** Name *** Legislative Data Group Rate Type		A first one is required
	eaddheet Legislative Data Group LS Legislative Data Group LS Legislative Data Group Click OK Click OK	Rate Type Grades Status Pending Changes

The effective start date will populate. If needed, we can change the date. The data displayed here is the recommended date to use. Enter the **Name** and click **Add Row**

= vision	${\sf Q}_{\sf c}$ Search for people and actions			습주⊢ㅎ 🖁
Create Grade Rate 🛛			Review	Save 🔻 Submit Cancel
▲ Grade Rate Details				
US Legislative Data Group	Enter Name			
*Effective Start Date	1/1/51	*Frequency	Annually ~	
*Name	Salaried Grade Rates	Annualization Factor	1.00	
"Rate Type	Salary ~	*Currency	USD V]
*Status	Active ~	Action Reason		~
Attachments	None 🕂	Context	~ ·	
	click Add Row		Minimum	Maximum Midpoint Value

Search for the Grade using the assistive search and click the Grade

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Create Grade Rate ©			Review Save	▼ Sub <u>m</u> it	<u>Ç</u> ancel
Grade Rate Details					
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*Effective Start Date 1/1/51 6		*Frequency Annually	~		
*Name Salaried Grade Rates		Annualization Factor	1.00		
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Admin07 UAE_ADMIN07 Common Set COMMON					
More					

Enter the **Minimum** and **Maximum** and the Midpoint will populate. Next, click **Add Row** to add additional Salaried Grade Rates, if applicable, and click **Review**

= vision	Q Search for people and actions		습 주 더 수 圆
Create Grade Rate 🛛		Review	Save V Submit Cancel
▲ Grade Rate Details		Click Review	
▲ US Legislative Data Group			
*Effective Start Date 1/1/51		*Frequency Annually ~	
*Name Salaried Grade Rates		Annualization Factor 1.00	
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	Enter I	Minimum and Maximum	

Click Submit

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Grade Rate Details		Click Submit
US Legislative Data Group		
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Attachments None	Conte	×t v
Grade Rate Values		
"Grade		Minimum Maximum Midpoint Value
Admin01 ~		50,000.00 60,000.00 55,000.00

Manage Grade Rates

Navigation: Home>My Client Groups>Show More from the Quick Actions>Manage Grade Rates>Search>Update Information>Submit

From the home screen, click My Client Groups

Next, click Show More

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	ෆ්" Hire an Employee	සිරා	⊳⁄⁄/	Æ		i∰,	
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	Show More						

Scroll down and under **Workforce Structures**, click **Manage Grade Rates**. As a note, we can search **Manage Grade Rates** by clicking Ctrl F

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	Worker Time Entry Profiles	Worker Time Processing Profiles			0.00
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		Approval Transactions	Area of Responsibility Templates	😽 Assignment Statuses	0 0 0 0
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	Country Security Profiles			HCM Exclusion Rules	7
	🖧 Job Details	8 Job Families	(a) Job Requisition Security Profiles	Legislative Data Group Security Profiles	0,00,00,00,00,00,00,00,00,00,00,00,00,0
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0 ^{°°°0} 0°0	Manage Legal Entity HCM More than the second seco	Manage Legal Reporting Unit HCM	🖓 Manage Legislative Data Group	ck Manage Grade Rates	000
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		Position Details	Rosition Details - Oracle Search		
THE REPORT		Request a New Position	Request a Position Change	Request a Position Change - Oracle Search	
AS NEW MARK	Role Mappings		Transaction Security Profiles		

Enter the **Grade Rate** name and click **Search**

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** Name US ** Legislative Data Group	~	** Grade Status Active	~	\checkmark		a read one of required
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✓ Search Results ⑦ View ▼ Format ▼ + Create ✓ Edit ▼ X Delete ഈ Export Manage in S	preadsheet			Click Search		
Name		Legislative Data Group	Rate Type	Grades	Status	Pending Changes
US Annual Salary Grade Rate		US Legislative Data Group	Salary	5	Active	No
US Hourly Grade Rate		US Legislative Data Group	Salary	Б1	Active	No
						

Click Grade Rate Name

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** Name US *** Legislater Data Group Rate Type	v	** Grade Status Active Effective As-of Date m/d/yy	< ¢⊜	v	Sea	rch Reset Save-
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Name		Legislative Data Group	Rate Type	Grades	Status	Pending Changes
US Annual Salary Grade Rate		US Legislative Data Group	Salary	5	Active	No
US Hourly Grade Rate		US Legislative Data Group	Salary	5	Active	No

To update the Grade Rate Details, click Edit and Update

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Grade Rate: US Annual Salary Grade Rate	0			Click Edit		Dgne
✓ Grade Rate Details Effective Start Date 1/1/S1 Effective Start Date Legislative Data Group US Legislative Data Group Name US Annual Salary Grade Rate Rate Type Salary Status Active		Frequency Annually Annualitation Factor 1.00 Currency USD Action Reason Context Attachments None		Click Upc	late	Edit View History Update Correct Delete Record
View 🔻 Format 👻 🕂 Add Row 🛛 X Remove						
*Grade			Minimum	Maximum	Midpoint	Value
Admin01			20,000,00	40,000,00	20,000.00	
Admin03			30,000.00	50,000.00	40,000.00	
Admin04			40,000.00	60,000.00	50,000.00	
Admin05			50,000.00	70,000.00	60,000.00	_
Prof01			20,000.00	50,000.00	35,000.00	
Prof02			30,000.00	60,000.00	45,000.00	
Prof03			40,000.00	70,000.00	55,000.00	
Prof04			50,000.00	80,000.00	65,000.00	
Prof05			60,000.00	90,000.00	75,000.00	-
Columns Hidden 1						

Enter the Effective Start Date, Action Reason, if applicable, and Click OK

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Grade Rate: US Annual Salary Grade Rat	e ©				Done
Grade Rate Details					Edit View History
Effective Start Date 1//S1 Effective End Date Legislative Data Group US Legislative Data Group Name US Annewal Safary Grade Rate Bate Type Safary Status Active	Frequency Annu Annualization Factor 130 Commo Action Reason Context	alty			
View Format Add Row Remove	* Effective Start Date 1/10/24				
"Grade	Action Reason	Minimum	Maximum	Midpoint	Value
Admin01	OK Cancel	10.000.00	30,000.00	20,000.00	
Admin02	Click OK	20,000.00	40,000.00	30.000.00	
Admin03		30,000.00	50,000.00	40.000.00	
Admin04		40,000.00	60,000.00	50,000.00	
Admin05		50,000.00	70,000.00	60,000.00	
Prof01		20,000.00	50,000.00	35,000.00	
Prof02		30,000.00	60,000.00	45,000.00	
Prof03		40,000.00	70.000.00	55.000.00	
Prof04		50.000.00	80,000.00	65.000.00	
Prof05		60.000.00	90,000.00	75,000.00	
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Here we can make the applicable updates and click $\ensuremath{\textbf{Review}}$

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View ▼ Format ▼ + Add Row X Remove		Minimum M	aximum Midpo	int Value
Admin01 Admin02		20,000.00	30,000.00 2 40,000.00 3	0.000.00
Admin03 Admin04		30,000.00 40,000.00	50,000.00 4 60,000.00 5 70,000.00 6	0.000.00
Prof01 Prof02		20,000.00	50,000.00 3	5.000.00
Prof03		40,000.00	70,000.00	

From the **Review Screen**, we can review the updates and click **Submit**

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Review Grade Rate: US Annual Salary Effective Start Date 1/10/24 Effective End Date	Grade Rate	Printable Page Back	Review	Save 🔻	Submit	<u>Cancel</u>
 ✓ Grade Rate Values ✓ current 						
Grade			Minimum	Maximum	Midpoint	Value
Admin01			10,000.00	30,000.00	20,000.00	A
Admin02			20,000.00	40,000.00	30,000.00	
Admin03			30,000.00	50,000.00	40,000.00	
Admin04			40,000.00	60,000.00	50,000.00	
Admin05			50,000.00	70,000.00	60,000.00	
Prof01			20,000.00	50,000.00	35,000.00	
Prof02			30,000.00	60,000.00	45,000.00	
Prof03			40,000.00	70,000.00	55,000.00	
Prof04			50,000.00	80,000.00	65,000.00	
Prof05			60,000.00	90,000.00	75,000.00	-
▲ Proposed						
Grade			Minimum	Maximum	Midpoint	Value
Admin01			12,000.00	30,000.00	2	A
Admin02			20,000.00	40,000.00	3	

Add Valid Grades To A Job

Navigation: Home>My Client Groups>Show More from the Quick Actions>Job Details>Search>Update Information>Submit

From the home screen, click My Client Groups

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	Act as Proxy Manager	Workforce Predictions	Data Exchange	Communicate			

Next, click Show More

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	හි [*] Hire an Employee	ന്പ	Cr∕t	風		Ē.	
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U U 0	⊗y∕ Transfer						
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Scroll down and under **Workforce Structures**, click **Job Details**. As a note, we can search **Job Details** by clicking Ctrl F

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Sei S.o. Statis	Action Reasons	Approval Transactions	Area of Responsibility Templates	🐯 Assignment Statuses	
	Candidate Security Profiles	Collective Agreements	🛃 Compare	or Configure Actions	0 0 0 0 0 0
			Document Type Security Profiles		00 0 0 001
	Job Details	😽 Job Families	(a) Job Requisition Security Profiles	Legislative Data Group Security Profiles	0 0 0 0 0
Click Job Details	By Location Details	👸 Maintain Areas of Responsibility	👸 Manage Business Units	👷 Manage Department Trees	00000
0 0 00 0	Manage Departments	Manage Departments - Oracle Search	Manage Disability Organizations	anage Divisions	
0 000 0 0 0	Manage Enterprise HCM Information	87 Manage Grade Ladders	👷 Manage Grade Rates	🖧 Manage Grades	
0 0 0 0	Manage Legal Entity HCM	Manage Legal Reporting Unit HCM	Manage Legislative Data Groups	anage Organization Trees	1 0 0 0 0 0
	Manage Position Trees	👸 Manage Reporting Establishments	😽 Manage Worker Unions	(a) Organization Security Profiles	0000
U U 0	Person Security Profiles	8 Position Details	Rosition Details - Oracle Search	Position Security Profiles	
		8 Request a New Position	Request a Position Change	 Request a Position Change - Oracle Search 	
	Role Mappings	Talent Pool Security Profiles	Transaction Security Profiles		
	Add Anytime Document	පිනි Add to Succession Plan	Add to Talent Pool	Channels	

Search for the **Job** by entering the **Job Name.** To populate all jobs, enter %% and click the **magnifying glass**

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✓ Job Details					Manage in Spreadsheet
	Jobs			+ Add	
	%% × 9	Show Filters Effective As-of Date On or after 1	1/11/24 Status Active ×		
	Enter Job I	lame		Sort By Job Name - A to Z	
강고한관람	Account Executive JOB052				
	Job Set Commercial Job Set		Job Family Sales		
	Status Active				
	Account Executive E360USJOB001				
	Job Set E360 US Job Set		Job Family Sales		
	Status Active				
	Accountant JOB001				
	Job Set Common Set		Job Family Accounting		
	Status Active				
	Accounting Clerk JOB016				P

Select the Job Name

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 Job Details 		Manage in Spreadsheet
Jobs		+ Add
%%	X Q Show Filters Effective As-of Date On or after 1/11/24 Status Active	×
		Sort By Job Name - A to Z
Account Dans Jobo Set Commercial lo Status Active	tee Job Name Job Family D Set Sales	
Account Beach Second Second Boo Set ESRO US Job Se Status Active	Job Pamily It Sales	
Accountant JOB001 Job Set Common Set Status Active	Job Family Accounting	
Accounting Cla JO8016	nk	

Next, click **Actions** then **Update**. As a note, if we select **Update**, we will update the information as of the effective date entered in the next steps. If we select **Correct**, we will correct the existing information as of the existing effective date (in this example, as of 1/1/1951)

■	vision		${\sf Q}_{{\sf c}}$ Search for people and actions		Click A	습☆中央 🔒
<	Account Executive	2				Actions Update
1.1.1		Job Details			Click	Update Correct Duplicate Create Profile
		Effective Date 1//51 - Action Reason Commercial Job Set Name Account Executive Code JOB052 Attachments		Job Family Sales Status Active Job Function Administrative Progression Job Requisition Template		
		Grades Valid Grades			^	
			There's no	othing here so far.		P

Enter the **Effective Date.** The Effective Start Date will populate. If needed, we can change the date. Next, scroll down to **Grades.** Search for the Grade using the assistive search and select the Grade. Click **Add**

	Attachments		
	Drag files here or click to add attachment 🗸		
	Grades	^	
	Valid Grades Click Add		
	Kito Confied Teacher Masters Kit2CTMD Degree Progress Salary 03 Progress Salary 03 Progress Salary		
Select Grade	1 1 1 10 10 11 11		
	Additional Info	~	

Once complete, click **Submit.** The Job Details have been updated as of the **Effective Start Date**

Update Job: Acco	unt Executive		Submit Cancel
	Altochneds	it	
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	Grades	^	
	Valid Grades		산물물로난물로
	Gade Salect a value		
	Progress Salary 03 Grade Code Progress Salary 03 Progress US Grade Set	×	
	Additional Info	~	
	Legislative Info	~	
	Evaluation Criteria	~	P

Create A Position

Navigation: Home>My Client Groups>Show More from the Quick Actions>Position Details>Add>Enter Information>Submit

From the home screen, click My Client Groups

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0 0 0 0 0	Me My Team My Client Group:		0 0 0 0				
	QUICK ACTIONS	APPS Click My	Client Groups				
	Hire an Employee	රීථ	M∕r	æ		± ∰	
	Change Working Hours		Person Management	Person Spotlight		யத் Time Management	
	Change Assignment		0				
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Next, click Show More

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Scroll down and under **Workforce Structures**, click **Position Details**. As a note, we can search **Position Details** by clicking Ctrl F

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	Action Reasons	8 Approval Transactions	Area of Responsibility Templates	Style Assignment Statuses	
	Candidate Security Profiles	Collective Agreements	ad Compare	Ref Configure Actions	00,000
0 0 0 ⁰ 0 0 0			Document Type Security Profiles	HCM Exclusion Rules	000000
	🚮 Job Details	8 Job Families	Job Requisition Security Profiles	Legislative Data Group Security Profiles	0 0 0 0 0
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	Manage Departments	Manage Departments - Oracle Search	Manage Disability Organizations	😽 Manage Divisions	1 0 000
	Manage Enterprise HCM Information	8 Manage Grade Ladders	😽 Manage Grade Rates	801 Manage Grades	9 0 0 0 0 0
0 0 0 0	Manage Legal Entity HCM	Manage Legal Reporting Unit HCM	Manage Legislative Data Groups	😽 Manage Organization Trees	1000000
	Click Position Details	8 Manage Reporting Establishments	😽 Manage Worker Unions	Organization Security Profiles	\$ 00 ° 00 °
υ 0 0	Person Security Profiles	Position Details	Reg Position Details - Oracle Search	Position Security Profiles	
		8 Request a New Position	Request a Position Change	Request a Position Change - Oracle	
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Click Add

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Position Details		Manage in Spreadsheet
Positions	7	+ Add
Search	Show Filters	
	Try searching to get results Search by position name or code, parent	
	posari raine or coe, po uppanina, incumber name or number.	

Select the applicable boxes and click Continue

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Request a New Position					Continue Cancel
		Select the a	pplicable boxes	Ciick Continue	
		What info do yo	u want to manage?		
	Budget Details	Additional Info	Legislative Info	Evaluation Criteria	
	Associated Profiles	Requisition Details			

Enter the information in the When and Why section, then click Continue

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Request a New Position		Submit Cancel
When and Why	Enter the below information	
*When does the new position st 1///51	art? What's the reason for this request?	v
	Click Continue	
 Position Details 		
③ Budget Details		
④ Additional Info		
Egislative Info		
(6) Evaluation Criteri	a	

Enter the information in the **Position Details** section according to our setups, then click **Continue**

'n	Cubra
, II	
(1) When and Why	Edit
Position Details Enter the	below/information
	below information
Parent Position	End Time
Controller ~	h:mm a
*Burinere Unit	Pagular or Temporary
Prograss US Business Unit	Regular of reinformy
	regular
[*] Name	Hiring Status
Assistant Controller	Approved
*Department	Requisition Template
Executive Office Prg US 🗸	Select a value v
*Job	Security Clearance
Controller	×
Location	Prohation Pariod
Reston	
Grade Ladder	Union
Select a value	Select a value
Grade	Bargaining Unit
Admin03 ~	Select a value
Add Another Grade	Collective Agreement
Entry Step	Select a value
~	Delegate Position
1	Select a uniting

Enter the information in the **Budget Details** section according to our setups, then click **Continue**

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① When and Why	Edit
(2) Position Details	Edit
Budget Amount Head Count 1	
Is the position budgeted? FTE Ves	
Cest Center Type Select a value Single incumbent Funded from existing positions? Single incumbent	
No v	
Cick Continue Additional Info	
(6) Legislative Info	—

Enter the information in the **Additional Info** section according to our setups, then click **Continue**

■ vision			
	When and Why	🖍 Edit	
	② Position Details	🖌 Edit	
	③ Budget Details	🖊 Edit	
	Additional Info		
	CRPB		
	Continue		
	Legislative Info		
	(6) Evaluation Criteria		
	⑦ Associated Profiles		P

Enter the information in the **Legislative Info** section according to our setups, then click **Continue**

Request a New Positi			Submit	<u>C</u> ancel
	 Budget Details 	🖌 Edit		
	 Additional Info 	🖌 Edit		
	Legislative Info Enter the below information Brazil Position Details			
	CBO Occupation CBO Occupation			
	Circk Continue			
	Evaluation Criteria Associated Profiles			
	Requisition Details		P	

Enter the information in the **Evaluation Criteria** section according to our setups, then click **Continue**

Request a New P	osition		Submit	Cancel
	③ Budget Details	✓ Edit		
	Additional Info	🖉 Edit		
	Legislative Info	🖊 Edit		
	Evaluation Criteria Enter the below information			
	*Evaluation Date Evaluation System 4/11/24 Custom			
	Custom System Massurement Unit Points V			
	Continge			
	Click Continue Associated Profiles			
	(i) Requisition Details		per la	

Enter the information in the **Associated Profiles** section according to our setups by clicking **Add**, then click **Continue**

③ Budget Details	
(4) Additional Info	
(5) Legislative Info ✓ Edit	
⑥ Evaluation Criteria	
Associated Profiles Enter the below information	
Profiles	
Cick Continue	
Requisition Details	

If we plan to post and recruit for this position according to our setups, enter the information in the **Requisition Details** section

Evaluation Criteria			🖍 Edit	
(7) Associated Profiles			🖌 Edit	
Requisition Details	Enter the b	elow information		
*Recruiting Type		*Primary Location		
Executive	~	Reston, VA, United States	~	
*Requisition Title		Other Locations		
Assistant Controller		Add Another Location		-
*Number of Openings		Legal Employer		
Limited ~	1	Select a value	~	
Display in Organization Chart		Primary Work Location	_	
		Reston	~	
*Hiring Manager		Other Work Locations		
Jon Blue Chairman	~	Add Another Work Location		
*Recruiter		Grade		
Conrad Recruiter Recruiter	~	Adminus		151
[*] Organization		Automatically Open Requisition for Sourcing		
Vision Corporation	~	No	<u> </u>	

We can update the information we have entered in any section by clicking **Edit**. Once we have entered all the position information, click **Submit**

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Request a New Positi	on		Submit Cancel
	① When and Why	Click Submit	
	 Position Details 	✓ Edit	
	③ Budget Details	🖉 Edit	
	(4) Additional Info	✓ Edit	
	(3) Legislative Info	🖉 Edit	
	Evaluation Criteria	✓ Edit	
	⑦ Associated Profiles	🖉 Edit	
	Requisition Details		P

Manage Positions

Navigation: Home>My Client Groups>Show More from the Quick Actions>Position Details>Search>Actions>Edit>Update Information>Submit

From the home screen, click My Client Groups

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	Change Assignment		0				
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	Act as Proxy Manager	Workforce Predictions	Data Exchange	Communicate			

Next, click Show More

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	Act as Proxy Manag	adictions	Data Exchange	communicate				
	Show More							
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Scroll down and under **Workforce Structures**, click **Position Details**. As a note, we can search **Position Details** by clicking Ctrl F

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如常思想是思想的大学》					
Section Providence	Action Reasons	Approval Transactions	Area of Responsibility Templates	and Assignment Statuses	0.0
000	Candidate Security Profiles	Collective Agreements	🛃 Compare	or Configure Actions	00000
			Document Type Security Profiles	By HCM Exclusion Rules	00 0 0 00
	📸 Job Details	🖧 Job Families	(a) Job Requisition Security Profiles	Legislative Data Group Security Profiles	0 0 0 0 0
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	Manage Departments	Manage Departments - Oracle Search	Manage Disability Organizations	Manage Divisions	1. 0 0 000
0000000	Manage Enterprise HCM Information	657 Manage Grade Ladders	👸 Manage Grade Rates	👷 Manage Grades	0000
0000	O Manage Legal Entity HCM	Manage Legal Reporting Unit HCM	🦓 Manage Legislative Data Groups	👷 Manage Organization Trees	1 0 0 0 0 0
	Click Position Details	ở Manage Reporting Establishments	🛃 Manage Worker Unions	(a) Organization Security Profiles	0000
V U 0	Person Security Profiles	Position Details	Resition Details - Oracle Search	Position Security Profiles	
		8 Request a New Position	Request a Position Change	Request a Position Change - Oracle	
	Role Mappings	Talent Pool Security Profiles	Transaction Security Profiles		
	Add Anytime Document	역왕 Add to Succession Plan	Add to Talent Pool	Channels	

Enter the **Position Name** and click **Magnifying Glass.** To generate a full list of positions, enter **%%** in the search bar and click the magnifying glass

= vision	${\sf Q}_{\sf c}$ Search for people and actions	습☆┍♀ 🔋
A Position Details A		Manage in Spreadtheet
Positions	Click Search	+ Add
Enter Position Name	X 🦿 Show Filters	
	Try searching to get results Search by position name or code, put apartment, position name or code, position	

Click Position Name

■ vision	${\sf Q}_{\sf c}$ Search for people and action	ns	l
Position Details			
	Positions		+ Add
	%% × Q Show Filters Effective As-of E	Date On or after 1/11/24 Status Active X	
			Sort By Name - A to Z
	Academic Advisor USHEPC5088 Parent Position Director of Enrollment Services	Incumbents	
	Accountant USHCPOS015		
	Parent Position	Incumbents Beame, Roger	~
	Accountant PRGUSPOS011		
	Parent Position Accounting Manager	Incumbents Collins. Genevieve	\vee
	Accounting Analyst PRGUSPOS013		
	Parent Position Ledger Manager	Incumbents Fournier, Celine	~
	Accounting Clerk POS016		
	Parent Position	Incumbents	

Click Actions and Update

= vision	${\bf Q}_{\rm c}$ Search for people and actions		Click Actions	
 ≺ Academic Advisor USHEPOS038 			Actions	
Details			Click Update Correct Dupicate Position Request a Position Change	
Effective Date 1/1/51 -		Standard Working Hours 40 Weekly	HCM Position Hierarchy Delete This Record	
Action Reason		Working Hours 40 Weekly	Delete Position Create Profile	
Status Active		Start Time 8:00 AM	Create Requisition	
Parent Position Director of Enrollmen	nt Services	End Time 5:00 PM		
Business Unit University US Busines	ss Unit	Regular or Temporary Regular		
Name Academic Advisor		Requisition Template		
Code USHEPOS038		Security Clearance		
Department Enrollment Services I	HE US	Probation Period		
Job HE Analyst		Union		
Main Campus Hiring Status		Bargaining Unit		
Approved		Collective Agreement		
Assignment Category	<i>,</i>	Delegate Position		

Enter the **Effective Start Date** and make the applicable updates and once complete, click **Submit**

= vision	Q Search 1	for people and actions			() 🌣 Þ 한 👸
Update Position: Academ	nic Advisor				Submit Cancel
Details	Upo	date the below	applicable information	Click Submit	
"Effecti	ive Date Enter a date betw	een 1/2/51 and 12/31/12.	Working Hours		
1/11/24	4 🚱 - m/d/yy	ii.	40 Weekly	~	
Action	Reason		Start Time		이 가지는 아무리 한 사람에 있다.
Select	a value	~	8:00 AM	(i)	
*Status			End Time		
Active		~	5:00 PM	i.	
Parent	Position		Regular or Temporary		
Directo	or of Enrollment Services	~	Regular	~	
*Busine	ess Unit		Requisition Template		
Univer	rsity US Business Unit	~	Select a value	~	
*Name			Security Clearance		
Acade	mic Advisor			~	승규가 가가 가 같다.
Code USHEP	OS038		Probation Period	~	
*Depar	tment		Union		관망물감물감물감물
Enroll	ment Services HE US	~	Select a value	~	
Job			Bargaining Unit		한국과 승규가는 가는 가지?
HE An	alyst	~	Select a value	~	
Locatio	n		Collective Agreement		

Add Valid Grades To A Position

Navigation: Home>My Client Groups>Show More from the Quick Actions>Position Details>Search>Actions>Edit>Update Information>Submit

From the home screen, click My Client Groups

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	QUICK ACTIONS	APPS Click M	y Client Groups				
	안 [#] Hire an Employee	සුරු	M∕	Å		±	
	Change Working Hours		Person Management	Person Spotlight		Time Management	
	(한) Change Assignment		0				
0000000		Compensation	Profiles	Learning	Workforce Structures	Payroll	
	🕑 Transfer						0 0 0
	Checklist Templates		创	ED.	+		
	Act as Proxy Manager	Workforce Predictions	Data Exchange	Communicate			

Next, click Show More

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	පි Hire an Employee	ස්තූ	M∕r	යු		i∰.	
	Change Working Hours		Person Management	Person Spotlight		Time Management	
	(9)/ Change Assignment	PCN	.0.		O "		
	By Termination	Compensation	Profiles	Learning	Workforce Structures	Payroll	
	Sy Transfer						
	Checklist Templates	Workforce	Data Exchange	Communicate	+		
Sector Contractor	Act as Proxy Manac Click Show M	ore					
	Show More						
	양 Termination 양 Transfer 融 Onecisins Templates & Act as Proxy Manager Show More	Compensation Q Wonforce dictions ore	Profiles	Learning Communicate	Workforce Structures	Payrol	

Scroll down and under **Workforce Structures**, click **Position Details**. As a note, we can search **Position Details** by clicking Ctrl F

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Sec. La Statistica	Action Reasons	Approval Transactions	Area of Responsibility Templates	Assignment Statuses	0
	Candidate Security Profiles	otiective Agreements	🌌 Compare	and the second s	00000
			Document Type Security Profiles	A HCM Exclusion Rules	000000
	🚓 Job Details	😽 Job Families	Job Requisition Security Profiles	Legislative Data Group Security Profiles	0,00,000
	60/ Location Details	😽 Maintain Areas of Responsibility	Manage Business Units	👷 Manage Department Trees	
	🔐 Manage Departments	Manage Departments - Oracle Search	Manage Disability Organizations	😹 Manage Divisions	
0000000	📆 Manage Enterprise HCM Information	👷 Manage Grade Ladders	😽 Manage Grade Rates	歲/ Manage Grades	0 0 0 0
0 0 0 0 0	Manage Legal Entity HCM	Manage Legal Reporting Unit HCM Information	Manage Legislative Data Groups	😹 Manage Organization Trees	<u> </u>
	Click Position Details	Manage Reporting Establishments	Manage Worker Unions	Organization Security Profiles	0 00 0
	Person Security Profiles	Position Details	Rosition Details - Oracle Search	Position Security Profiles	
		Request a New Position	Request a Position Change	Request a Position Change - Oracle	
	Role Mappings	Talent Pool Security Profiles	Transaction Security Profiles		
					-
	Add Anytime Document	역왕 Add to Succession Plan	Add to Talent Pool	Channels	

Enter the **Position Name** and click **Magnifying Glass.** To generate a full list of positions, enter **%%** in the search bar and click the magnifying glass

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Position Details				Manage in Spreadsheet
	Positions Click Searc	h	+ Add	
	%% × 🔇 Show Filters			
Enter Position Name	<i>C</i> C	Try searching to get results Sarch by position name or coals, parent position name or coals, job department, iocumbled name or number.		

Click Position Name

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< Position Details				Manage in Spreadsheet
	Positions		+ Add	
주말을 감각을	%% × Q Show Filters Effective	e As-of Date On or after 1/11/24 Status Active \times		
			Sort By Name - A to Z	
	Academic Advisor USHEPOS038			
	Parent Position Click Position Name	Incumbents	~	
	Accountant USHCPOS015			
	Parent Position	Incumbents		
		Beame, Roger	~	21.22 승규는 2003년 -
	Accountant PRGUSPOS011			
	Parent Position	Incumbents		
	Accounting Manager	Collins, Genevieve	~	엄마, 아이는 것은 아이는 것
	Accounting Analyst PRGUSP05013			
	Parent Position	Incumbents		
12/22/22/22/23	Ledger Manager	Fournier, Celine	~	
	Accounting Clerk POS016			
이 그 한 것 같은 것 수 것 같은 것	Parent Position	Incumbents		

Click Actions and Update

= vision	Q Search for people and actions	Click Actions
 ✓ Academic Advisor USHEPOS038 		Actions V
Details		Click Update Correct Digitate Position Request a Position Change
Effective Date	Standard Working Hours 40 Weekly	HCM Position Hierarchy Delete This Record
Action Reason	Working Hours 40 Weekly	Delete Position
Status Active	Start Time 8:00 AM	Create Requisition
Parent Position Director of Enrollment Serv	ices 5:00 PM	
Business Unit University US Business Unit	Regular or Temporary Regular	
Name Academic Advisor	Requisition Template	
Code USHEPOS038	Security Clearance	
Department Enrollment Services HE US	Probation Period	
Job HE Analyst Location	Union	
Main Campus Hiring Status	Bargaining Unit	
Approved Manager	Collective Agreement	
Assignment Category	Delegate Position	

Scroll down to expand the **Grades**. Here we manage the **Grade Ladders** and **Grades**. We can select the **Grade Ladder** from the drop down and add grades by selecting the grade from the dropdown and clicking **Add**. We can also select the **Entry Grade** and **Entry Step** from the dropdown.

sion			Q Ѽ ☆ Þ
	Drag files here or click to add attachment 🐱		
	Budget Details	·	
	Grades Update the below applicable information	^	
	Grade Ladder		
	Grade Ladder		
	Facilities Grade Ladder		
	Valid Grades	-	
	Grade		
	Select a value V + Add		
	Facility 01	×	
	Grade Code Set Name FACIUTY_01 Common Set		
	Entry Grade		
	Entry Grade Entry Step		
	Facility 01 V		

Once we have entered and reviewed our Grade updates, click Submit

Update Pos	ition: Academic Advisor		Submit Cane
USHEPOS038		Submit	
	Grades	^	
	Grade Ladder		
	Grade Ladder		
	Facilities Grade Ladder		
	Valid Grades		
	Grade		
	Select a value V 🕂 Add		
	Facility 01	×	
	Grade Set Name FACILITY_01 Common Set		
	Entry Grade		
	Entry Grade Entry Step		
	Facility 01 V		
	Additional Info	\vee	
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	Evaluation Criteria	\sim	

Create Grade Ladder (With or Without Steps)

Navigation: Home>My Client Groups>Show More from the Quick Actions>Manage Grade Ladders>Create>Enter Information>Submit

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From the home screen, click My Client Groups

Next, click Show More

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	QUICK ACTIONS	APPS					
	ල්* Hire an Employee	සීරා	M	Æ		ŧ,	
	Change Working Hours		⊢∳⁄ Person Management	Person Spotlight		Time Management	
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	→ By Transfer				Structures		0.00 6
	Checklist Templates	Q	Ŵ	HD	+		
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Scroll down and under **Workforce Structures**, click **Manage Grade Ladders**. As a note, we can search **Manage Grade Ladders** by clicking Ctrl F

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	Worker Time Entry Profiles	Worker Time Processing Profiles			1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1
101, 11.0	Workforce Structures				A Carlo A.
	Action Reasons	Approval Transactions	Area of Responsibility Templates	Assignment Statuses	0 0 0 0 0 0
	Gandidate Security Profiles	Collective Agreements	8 Compare	a Configure Actions	00 0 0 00 0
			Document Type Security Profiles		
	8 Job Details	🔐 Job Families		 Legislative Data Group Security Profiles 	
	Styl Location Details	🚽 Maintain Areas of Responsibility	😽 Manage Business Units	😽 Manage Department Trees	0000000
	87 Manage Departments	🔐 Manage Departments - Oracle Search	👸 Manage Disability Organizations	😹 Manage Divisions	00000
0000 0 0	Manage Enterprise HCM Information	Manage Grade Ladders	😽 Manage Grade Rates	😹 Manage Grades	
000 0	Manage Legal Entity HCM	Manage Legal Reporting Unit HCM	Click Manage Grade Lad	ders lanage Organization Trees	0 ⁰⁰ c
	Manage Position Trees	Manage Reporting Establishments	😽 Manage Worker Unions	Organization Security Profiles	
	Person Security Profiles	By Position Details	8 Position Details - Oracle Search		
Survey of the second	Preview HCM Data Security	Request a New Position	👷 Request a Position Change	Request a Position Change - Oracle Search	
	🖧 Role Mappings	(a) Talent Pool Security Profiles	(a) Transaction Security Profiles		

Next, click **Create**
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Anage Grade Ladders				
⊿ Search	* see	Advanced Saved	Search Active G	rade Ladders v
Grado Ser	Effective As of Date (m/4/39)	¥	Sa	arch Reset Save
▲ Search Results ⑦ Vew ▼ Format ▼ ← Create ↓ Edit ▼ X Delete 河 Export Manage in S	preaduheet			
Name Click Create	Qrade Set	Grades	Status	Pending Changes
				

Next, enter the **Grade Ladder Details.** If we have multiple **Grade Sets**, we'll need to select the appropriate **Grade Set.** Under **Grade Type**, we can select **to attach Grades** or **Grades with Steps;** depending on what we select here will determine the information we will need to enter on the next page

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	1) - 2) - 3) - () Grade Grades Rate Values Review		
Create Grade Ladder: Grade Ladder Details	uaaer ©	Back Negt Save V	Sub <u>m</u> it <u>C</u> ancel
Grade Ladder Hierarchy Grade Ladder Details	Enter the below information		
View	51 🖏	*Status Active V	
*Grade Set Co	nmon Set V	Action Reason	
Grade Type	V Grade Ladder	Attachments None +	
ar ar	de with trips		

Once the information is entered, click Next

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	1) - 2) - 3) - 4) Grade Crade Rate Wiles Review Laddr		
Create Grade Ladder: Grade Ladder Detai	s ©	Back Negt Save 🔻	Sub <u>m</u> it <u>C</u> ancel
▲ Grade Ladder Hierarchy ▲ Grade Ladder Details ②		Click Next	
View * Effective Start Date * Grade Ladder * Grade Set	1/1/51 👘	*Status Active ~	
"Name	New Grade Ladder	Context V	
Grade Type	Grade with steps 🛛 🗸	Attachments None 🕂	
			

Now we'll enter the grade information. Enter the Code and Name and click Search

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		✓ — 2 − 3 Grade Grades Rate Valu Ladder	- 🕢				
Create Grade Ladder: Grades							
Effective Start Date 1/ Grade Set Co	r1/51 ommon Set	~	Name New Grade Ladder Grade Type Grade with steps				
▲ Grade Ladder Hierarch @	# Search: Grades						
View View View View View View View View View	** Code DE		** Name DE		** At least one is required		
	▲ Search Results: Grades	Enter Code		Enter Name	Click Search		
	Name	adder		Code			
	DE-EG1			DE-EG1	A		
	DE-EG10			DE-EG10			
	DE-EG11			DE-EG11			
	DE-EG12			DE-EG12			
	DE-EG13			DE-EG13			
	DE-EG2			DE-EG2			
	DE-EG3			DE-EG3			
	DE-EG5			DE-EG4			
	DE-EG6			DE-EG6	1		

Highlight the row of the **Grade** we wish to add to the Ladder and click **Add to Grade Ladder**. The **Steps** associated to the grades will also be added. We can add multiple Grades to the Ladder

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	⊘—2 — Grade Grades Rate Wil Lader	i — 🕥 ues Review	
Create Grade Ladder: Grades		<u>B</u> ack Negt	Save v Sub <u>m</u> it <u>C</u> ancel
Effective Start Date 1/1/51 Grade Set Common Set		Name New Grade Ladder Grade Type Grade with steps	
	DE	** Name DE	** At least one is required
✓ Search Results: Grades View ▼ Format ▼	Click Add to Grade Ladd	ler	Search Reset
Name			Code
DE-EG1			DE-EG1
DE-EG10	Click Row		DE-EG10
DE-EG12			DE-EG12
DE-EG13			DE-EG13
DE-EG2			DE-EG2
DE-EG3			DE-EG3
DE-EG4			DE-EG4
DE-EG5			DE-EG5
DE-EG6			DE-EG6

After we add the first Grade, we will be asked where we want to place the second grade. We will select **After Grade** 1. We will follow this process to add additional grades. Click **OK**

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	⊘—2 – 9 – 0 Gode Gode Ret Wales Review	
Create Grade Ladder: Grades	Back	Negt Save 🔻 Submit Cancel
Effective Start Date 1/1/51 Grade Set Common Set	Name New Grade Ladder Grade Type Grade with steps	
▲ Grade Ladder Hierarch ② ▲ Search: Grades		
View • E X • • A New Grade Lador # DE-EGI	Add to Grade Ladder Hierarchy X ** Name DE Grade Pacement () At the top	** At least one is required Search Reset
Stufe 1 Stufe 2 Stufe 3 View + Format + Add to Gra	After grade DE-E81 V	
Name	Click OK	Code
DE-EG1		DE-EG1
DE-EG10		DE-EG10
DE-EG11		DE-EG11
DE-EG12		DE-EG12
DE-EG13		DE-EG13
DE-EG2		DE-EG2
DE-EG3		DE-EG3
DE-EG4		DE-EG4
DE-EG5		DE-EGO

Once all the Grades have been added, click Next

= vision		Q Search for people and actions		습 ☆ ᄆ ᅌ 🚦
		⊙—@ – Grade Crade Rate Ladder	D - C	
Create Grade Ladder	:: Grades		Back Negt	Save Submit Cancel
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Grade Ladder Hierarch	⑦			** At least one is required
▲ New Grade Ladder ▲ DE-EG1 Stute 1	** Code	DE	** Varme DE	Search Reset
Stufe 2 Stufe 3 I DE-EG2	✓ Search Results: Grad	es Add to Grade Ladder		
Stute 1	Name			Code
Stufe 3	DE-EG1			DE-EG1
⊿ DE-EG3	DE-EG10			DE-EG10
Stute 2	DE-EG11			DE-EG11
Stute 3	DE-EG12			DE-EG12
	DE-EG13			DE-EG13
	DE-EG3			DE-EG2
	DE-EG4			DE-EG4
	DE-EG5			DE-EG5
	DE-EG6			DE-EG6

Here we can enter the Grade Step Rates, if applicable. It is recommended we add the Grade Rates through the Manage Grade Rates task prior to the creation of the Ladder but, we can add them here. Select the **Legislative Data Group.** Next, click **Add Row**

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	⊘————————————————————————————————————		
Create Grade Ladder: Rate Values ⊚		Back Ne <u>x</u> t Save	Submit <u>C</u> ancel
Effective Start Date 1/1/51 Grade Set Common Set	Grade	Name New Grade Ladder Type Grade with steps	
Legislative Data Group US Legislative Data Group			
Grade Step Rates Select Legi	lative Data Group		
Name Click Add Row		Rate Type Frequency	Annualization Factor Currency
No data to display.			
▲ Step Rate Values			
View - Format - Grade Name		Name	Value
No data to display.			

Next, enter the Values and once complete, click Next

= vision	${\sf Q}_{\sf c}$ Search for people and actions		() 주 년 🖞
	Grade Grades Rate Wates Review		
Create Grade Ladder: Rate Values ⊘		Back Ne <u>xt</u> Save v	Sub <u>m</u> it <u>C</u> ancel
Effective Start Date 1/1/51 Grade Set Common Set		Click Next w Grade Ladder Grade Type Grade with steps	
Legislative Data Group			
 Grade Step Rates 			
View 🔻 Format 👻 🕂 Add Row 💥 Remove			
*Name		Rate Type Frequency	Annualization Factor Currency
New Grade Ladder Rates		Salary V Annually V	1.00 USD ~
Enter Name			
New Grade Ladder Rates: Step Rate Values			Enter the Values
View - Format -			
Grade Name		Name	Value
DE-EG1		Stufe 1	50.000.00
DE-EG1		Stufe 2	55,000.00
DE-EG1		Stufe 3	60.000.00
DE-EG2		Stufe 1	65,000.00
DE-EG2		Stufe 2	70.000.00

Lastly, we'll review the Ladder information and once our review is complete, click **Submit**

= vision	Q Search for people and actions		() 🌣 Þ 후 👸
	Cinde: Crades Rate Values Review Lador		
Create Grade Ladder: Review		Printable Page Back Negt Save	Sub <u>mit</u>
Grade Ladder Details		Click Submit	
Effective Start Date 1//51 Name New Grade Ladder Grade Set Common Set Action Reason		Status Active Grade Type Grade with steps Context Attachments None	
₄ Grade Ladder Hierarchy View ▼	Review the below information		
▲ New Grade Ladar ▲ DE-EG1 Subt 1 Subt 2 Sub 3 ▲ DE-EG2 Sub 3 ▲ DE-EG2 Sub 3 ▲ DE-EG3 Subt 1 Subt 1 Subt 2 Subt 2 Subt 2 Subt 2 Subt 3			
▲ Rate Values			P

Manage Grade Ladders

Navigation: Home>My Client Groups>Show More from the Quick Actions>Manage Grade Ladders>Search>Update Information>Submit

From the home screen, click My Client Groups

= vision	${\sf Q}$ search for people and actions						습 수 더 ㅎ 👸
. Configuration	Good morning, Curt	is Feitty					
0 0 0 0 0	Me My Team My Client Group:	s My Reporting					0 0 0 0
	QUICK ACTIONS	APPS Click My	Client Groups				
	Hire an Employee	රීථ	M∕r	æ		± ∰	
	Change Working Hours		Person Management	Person Spotlight		யத் Time Management	
	Change Assignment		0				
	Service Change wanager	Compensation	Profiles	(▷) Learning	400/ Workforce Structures	Payroll	
0 ^{°°0} 0°0	👷 Transfer						0.
	Checklist Templates	\square	111	HP	+		
	Act as Proxy Manager	Workforce Predictions	Data Exchange	Communicate			

Next, click Show More

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	Me My Team My Client Gr	oups My Reporting					0 0 0 0 0
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0 0 00 0	Change Working Hours		Person Management	Person Spotlight		Time Management	
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	Change Manager	1 0%	Å	\bigcirc	a /		090900
000	⊗y Termination		Profiles		Workforce Structures	Payroll	00° c
0 0 0	∯⁄/ Transfer	0		ක්ම			C. S. C. S. S.
	Checklist Templates	Workforce	Data Exchange	Communicate	+		
States of the second second	68 Act as Proxy Manage Click Show	More					
	Show More						

Scroll down and under **Workforce Structures**, click **Manage Grade Ladders**. As a note, we can search **Manage Grade Ladders** by clicking Ctrl F

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STATISTICS IN PARTY	Worker Time Entry Profiles	Worker Time Processing Profiles			244 A. 8 0 6 n
Loi de Statistica	Workforce Structures				all all all and a
0 0 0 0 0	Action Reasons	Approval Transactions	Area of Responsibility Templates	Assignment Statuses	0 0 0 0 0 0 0
	Candidate Security Profiles	Collective Agreements	8 Compare	By Configure Actions	00 0 0 0 00 0
			Document Type Security Profiles		
	881 Job Details	🖧 Job Families		Legislative Data Group Security Profiles	0 9 0 0 0 0 0
	67 Location Details	Maintain Areas of Responsibility	😽 Manage Business Units	Manage Department Trees	0,000
	880 Manage Departments	👸 Manage Departments - Oracle Search	😽 Manage Disability Organizations	Hanage Divisions	0 0 0 0
	😽 Manage Enterprise HCM Information	Manage Grade Ladders	😽 Manage Grade Rates	😹 Manage Grades	And Loop 200
0000	D Manage Legal Entity HCM	Manage Legal Reporting Unit HCM	6 Click Manage Grade Ladd	ers anage Organization Trees	0 ⁰⁰ c
0	😽 Manage Position Trees	😹 Manage Reporting Establishments	😽 Manage Worker Unions	Organization Security Profiles	
	Person Security Profiles	A Position Details	Position Details - Oracle Search		
Same and the second	Preview HCM Data Security	😽 Request a New Position	🖅 Request a Position Change	Request a Position Change - Oracle Search	
	Role Mappings	(a) Talent Pool Security Profiles	(a) Transaction Security Profiles		

Next, Enter the Grade Ladder Name and click Search

= vision	Q Search for people and actions		△ ☆	P &
✓ Manage Grade Ladders				
▲ Search	** Grade	Advance v	ad Saved Search Active Gra	de Ladders V
Gaes se Ente	r Name Effective As 37 Date	2/28/24 ¹ 9	Sear	ch Reset Save_
Search Kesuits ✓ View ▼ Format ▼ + Create Edit ▼ X Delete □ Export Manage in Sy Name	readsheet Grade Set	Click Sear	ies Status	Pending
Progress Hourly Grade Ladder	Progress US Gr	ade Set 🔤	i Active	No

Highlight the row of the **Grade Ladder** and click **Edit**, then **Update**. As a note, we can click Correct if we are correcting data that was entered in error, otherwise, we'll click Update

= vision	Q Search for people and actions		☆	· Þ ¢
✓ Manage Grade Ladders				
⊿ Search		Advanced Saved	Search Active Gr	ade Ladders v
** Name Progress Hourly Grade Ladder Grade Set States Active	Effective As of Date 2/28/24	~	,	
A Search Results (1)	nadsheet		Sez	arch Reset Save
Progress Hourly Grade Ladder	Grade Set Progress US Grade Set	Grades	Status	Changes
C	k Row			
				

Enter the Effective Start Date, Action Reason, if applicable, then click OK

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✓ Manage Grade Ladders				
# Search ** Name Progress Hourly Grade Ladder Grade Sat	enter the information	Advar ads 2/28/24 @	rced Saved Search Active	Grade Ladders v
✓ Search Results ⑦ Vex ▼ Format ▼ ⊕ Greate	Update Grade Ladder X CBC Constraint Constra	Gr	ades Status	earch Reset Save_ Pending Changes
Progress Hourly Grade Ladder	Click OK Progress L	S Grade Set	🛱 Active	No
			per la construcción de la constr	

Next, we'll update the applicable information. We can add or remove grades by select the **Arrow** and clicking either add or delete grades

= vision		Q Search f	or people and actions			() 상 년 순 👸
Edit Grade Ladder: Pr	ogress Hourly	Grade Ladder	0	Back	Review Sav	re V Submit <u>C</u> ancel
*Effective Start Date	2/28/24			Action Reason Reorgani	ization ~	
Grade Ladder Details Rate Values	Select Arrow	U	Ipdate the applicable informat	ion below		
View V A Progress Hourly Grade	[*] Grade Set	Progress US Grade Set v		[*] Status Context	Active v	
Hourly 01 Step 1 Hourly 01 Step 2 Hourly 01 Step 3 Hourly 01 Step 4	Click Add or Delete	rade with steps v		Attachments	None 🕂	
Hourly 01 Step 5 Hourly 02 Hourly 02 Step 1						
Hourty 02 Step 2 Hourty 02 Step 3 Hourty 02 Step 4 Hourty 02 Step 5						
✓ Hourly 03 Hourly 03 Step 1 Hourly 03 Step 2						
Hourry U3 Step 3 Hourry 03 Step 4 Hourry 03 Step 5						P

Once our updates are complete, click **Submit**

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Edit Grade Ladder: Progress Hourly	Grade Ladder ⊚	Bick Review Save V Submit Cancel
*Effective Start Date 2/28/24 (%) Effective End Date		Crick Submit
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Houny 01 Step 4 Houny 02 Step 5 - Houny 02 Step 1 Houny 02 Step 2 Houny 02 Step 3 Houny 02 Step 5		
4 Polany vo Haany (V) Step 1 Haany (S) Step 2 Haany (S) Step 4 Haany (S) Step 4 Haany (S) Step 5		P

Create An Area of Responsibility Template

Navigation: Home>My Client Groups>Show More from the Quick Actions>Area of Responsibility Templates>Create>Enter Information>Submit

From the home screen, click My Client Groups

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. Configuration	Good morning, Curtis Feitty						
0 0 0 0 0	Me My Team My Client Group	s My Reporting					0 0 0 0
	QUICK ACTIONS	APPS Click My	Client Groups				
	Hire an Employee	රීථ	M∕r	æ		± ₽	
	Change Working Hours		Person Management	Person Spotlight		تنبی Time Management	
0 0 0 0 0 0 0 0	🕎 Change Assignment					INFORMATION IN CONTRACTOR	00000
0000 00	📋 Change Manager	Compensation	Profiles	Learning	Horkforce	Payroll	
0 ⁰⁰ 0 0 0	🕎 Transfer						000
	Checklist Templates	\square	£\$	HP	4		
	🔐 Act as Proxy Manager	Workforce Predictions					
							1.2 4 ⁵ 365
			A GA				

Next, click **Show More**

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Good morning, Curtis Feitty							
	Me My Team My Client Group		0 0 0 0 0				
	QUICK ACTIONS	APPS					0 0 0 0 0
	🖉 🕈 Hire an Employee	දුරා	M	ැම		±₽,	
	Change Working Hours		Person Management	Person Spotlight		Time Management	
0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	🕎 Change Assignment						0000
0000	P Change Manager	<u>.</u>	Å	\bigcirc	8		0,000,0
000	Cy Termination				Workforce Structures		00%
U 0 0	👷 Transfer						
	Checklist Templates	Q	Û)	HP	+		
	Act as Proxy Manag	ore	Data Exchange	Communicate			
	Show More						
			a Atst				

Scroll down and under **Workforce Structures**, click **Area of Responsibility Templates.** As a note, we can search **Area of Responsibility Templates** by clicking Ctrl F

= VISION				익 습 ☆ 曰 🥔 🔋
S. BERKEY	Worker Time Entry Profiles	Worker Time Processing Profiles		
-0°0°	Workforce Structures			0 000
		Approval Transactions	Area of Responsibility Templates	Assignment Statuses
	Candidate Security Profiles	Collective Agreements	🖧 Compare	& Configur Click Area of Responsibility Templates
	Country Security Profiles			Ar HCM Exclusion Rules
0 0 0 0 0 0	80% Job Details	🖧 Job Families	Job Requisition Security Profiles	Englistative Data Group Security Profiles
	Location Details	Maintain Areas of Responsibility	Manage Business Units	👷 Manage Department Tirees
	😽 Manage Departments	Manage Departments - Oracle Search	👸 Manage Disability Organizations	👷 Manage Divisions
	👷 Manage Enterprise HCM Information	Manage Grade Ladders	😹 Manage Grade Rates	Anage Grades
	Manage Legal Entity HCM Information	D Manage Legal Reporting Unit HCM	👸 Manage Legislative Data Groups	👷 Manage Organization Trees
	🛱 Manage Position Trees	Manage Reporting Establishments	👸 Manage Worker Unions	Organization Security Profiles
		By Position Details	😽 Position Details - Oracle Search	Position Security Profiles
		Request a New Position	Request a Position Change	g., Request a Position Change - Oracle
	Role Mappings		Transaction Security Profiles	

Next, click Add

= vision	Q Search for people and actions	습 ☆ ᄆ 🕫 😭
< Area of Responsibil	ity Templates	
	Templates	Click Add
	Search by template name. code. Q Show Filters	Sort By From Date - Latest to Olde ∨
	Try searching to get results Search by template name, code, or scope	

Click Assign to People and click Continue

= vision	Q Search for people and actions	습 수 두 🗘 🚦
Create Responsibility Template		Continue
	What info do you want to manage?	
	Assign to People	
Click	Assign to People	

Enter the **Basic Info** and click **Continue**

= vision	Q Search for people and actions			습 🌣 Þ 🏟 🔋
Create Responsibility Template				Submit Cancel
Basic Info	Enter the information t	below		
*Name Leave Administrator	*From Da 2/29/24	te	ii ja	
*Code LEAVE_ADM_AOR	To Date		<u>ت</u> ه	
*Responsibility Type Human Resources Re	*Status presentative ~ Active		×	
Usage Approval. Checklist	(2) V	le in work contacts		
Description This AOR will handle	Leave Questions and other leave administration.			
	Continue			
	Click Continue			
(2) Responsibil	ty Scope			P

Next, enter the **Responsibility Scope** and click **Continue**

= vision	Q Searc	h for people and actions		습 ☆ ᄆ 🕫 🔋
Create Responsibility Te	mplate			Submit Cancel
	1 Basic Info		📝 Edit	
	2 Responsibility Scope	Enter the below information		
	*Attribute Name Country	Value United States	+ Add ×	
	(3) Assign to People	Continue		
				-

Lastly, Enter the **Assign to People** Information if we wish to assign this AOR to an Employee, if not, we can leave it blank and click **Submit**

= vision	$\boldsymbol{Q}_{}$. Search for people and actions	D ·	쇼 ᄃ 🗘 🔋
Create Responsibility Template		Submit	Cancel
13 (1) Basic Info		Edit	
 Responsibility Scop 	De	🖌 Edit	
Assign to People			
Select People Search for a Person	v		
John Lee Consultant Leave Administrator 1		x	

Employee Management

Add A Pending Worker

Navigation: Home>My Client Groups>Show More from the Quick Actions>Add A Pending Worker>Enter Information>Submit

From the home screen, click My Client Groups

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. 10. 9. 0 Martin	Good morning, Curtis Feitty						
0 0 0 0 0	Me My Team My Client Group	My Reporting					0 0 0 0 0
	QUICK ACTIONS	APPS Click M	y Client Groups				
	Hire an Employee	ĥų	Scale Contraction	風		₽₽.	
0 0 00 0	Change Working Hours	Hiring	Person Management	Person Spotlight		Time Management	
000000	Change Assignment						
0,0000	Change Manager		ති	\bigcirc	æ/		0,00,00
	₩ Termination				Workforce Structures		0 00°
0 0 o	☆ Transfer						
	Checklist Templates	\square	ŝ)	HD	+		
	anager	Workforce Predictions	Data Exchange	Communicate			

Next, click Show More

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	Good morning, Curtis Feitty Me My Team My Client Groups My Reporting						
	QUICK ACTIONS	APPS					
	 ear Employee Change Working Hours Change Assignment 	සිරි Hiring	Person Management) 문화 Person Spotlight		Time Management	
	응 Change Manager 안/ Termination	Compensation	Profiles	► Learning	Workforce Structures	Payroli	
	හු Transfer ඎ Checklist Templates	Workforce	Data Exchange	Communicate	+		
	Act as Proxy Manas Click Show M	ore					

Scroll down and under **New Person**, click **Add a Pending Worker**. As a note, we can search **Add a Pending Worker** by clicking Ctrl F

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Statistics of the	ි [#] Hire an Employee	B Identification Info	🕎 Local and Global Transfer	Manage Job Offers	0.6.0
a di dia di di di di	Manage User Account	Mass Download of Document Records	🛱 Mass Legal Employer Change	Nudge Configuration	
0 0 0 0 0		O Person Identifiers for External Applications	호텔 Person Spotlight		0 0 0 0 0
			Seniority Dates		00 0 0 00
	战/ Work Relationship	8 Workforce Modeling			0 10 000
	Transaction Configuration and Audit				
	HCM Experience Design Studio				
000	New Person				
0 ⁰ 0 0 0	Add a Contingent Worker		Add a Pending Worker		
	Document Records		Click	Add a Pending Worker	
	Document Delivery Preferences				
	Compensation				
	Action Reasons	🛞 Active Plans	Administer Compensation	Administer Workers	

From the **Add a Pending Worker** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**

= vision	Q Search for people and actions	습 수 단 🧳 🔮
Add a Pending Worker		Continge Cancel
	Select: the boxes What info do you want to manage?	Click Continue
Communication	Info	Crizenshp Info
Passport Info	Driver's Licenses	Family and Emergency Contacts
🖬 Maintain Manag	ers Work Relationship Info	Salary
	Comments and Attachments	

Enter the information in the When and Why section, then click Continue

= vision	Q Search f	or people and actions		
Add a Pending Worker				Submit Cancel
	When and Why	Enter the b	elow/information	
	"When is the pending worker start date?		"What's the way to add the pending worker?	
1993년 1993년 1993년 1993년 1993년 1993년 1993년 19	1/12/24	ŝ	Add Pending Worker	
응전: 관련 관람 :	*Legal Employer		Why are you adding a pending worker?	
SECHERCE SEC	US1 Legal Entity	~	Future hire to fill vacant position $\qquad \qquad \lor$	
	*Proposed Worker Type			
승규는 감독을 가지?	Employee	~		전통 그 오는 것이라. 그는
날날 대한 관련되었는			Continue	
	Click Cor	ntinue		
	Personal Details			
	0			
	(3) Communication Info			
	(4) Addresses			
	· · · · · · · · · · · · · · · · · · ·			
	5 Legislative Info			

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. We can also edit the information in each section by clicking **Edit**. Once we have added the information in the sections below, click **Submit**. The Pending Worker has been created.

ld a Pending V	Vorker	Submit
	(*) Payroll Details	Click Submit
	(15) Salary	🖉 Edit
	(6) Compensation	🖉 Edit
	Comments and Attachments	
	Comments	Comments
	Attachments	
	Drag files here or click to add attachment 🐱	

Convert Pending Workers

Navigation: Home>My Client Groups>Show More from the Quick Actions> Pending Workers>Enter Information>Submit

From the home screen, click My Client Groups

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0 0 0 0 0	Me My Team My Client Group	My Reporting					0 0 0 0 0
	QUICK ACTIONS	APPS Click M	y Client Groups				
	Hire an Employee	ĥų	Scale Contraction	風		₽₽.	
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000000	Change Assignment						
0,0000	Change Manager		ති	\bigcirc	æ/		0,00,00
	₩ Termination				Workforce Structures		0 00°
0 0 o	☆ Transfer						
	Checklist Templates	\square	ŝ)	HD	+		
	anager	Workforce Predictions	Data Exchange	Communicate			

Next, click Show More

= vision	Q Search for people and actions							
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	QUICK ACTIONS	APPS						
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	Show More							
			sa latish					

Scroll down and under **New Person**, click **Pending Workers**. As a note, we can search **Pending Workers** by clicking Ctrl F

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States and the second	Hire an Employee	s Identification Info	👷 Local and Global Transfer	Manage Job Offers	
Loi Bo Martin	Manage User Account	Mass Download of Document Records	👷 Mass Legal Employer Change	Nudge Configuration	0.0
0 0 0 0 0		Person Identifiers for External Applications			0 0 0 0 0
			Seniority Dates		00 0 0 00
	最/ Work Relationship	8 Workforce Modeling			a 1 0 0 0 0 0
	Transaction Configuration and Audit				
	HCM Experience Design Studio				
	New Person				8 6 0°0°
	Add a Contingent Worker		ි [#] Add a Pending Worker	Pending Workers	0
	Document Records		Click Pending Workers	A REPORT	
	Document Delivery Preferences				NO CONTRACTOR
	Compensation				
	ation Reasons	🛞 Active Plans	2000 Administer Compensation	Administer Workers	

From the **Pending Workers** screen, select the three dots (...) across from the pending workers name we wish to convert and click **Convert**. By clicking **Convert** instead of **Quick Convert**, we will have the opportunity to update the employee's details. If we click **Quick Convert**, the employee will be converted to the proposed worker type without the ability to update the employee's details

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Pending Workers			
Pending Workers		+ Add	
Enter person name, job, departa	٩	Sort By Planned Start Date - Latest V	Click
Jalen Santiago Planned Start Date 11/18/22	6256	Convert Quick Convert	
Mel Olson Planned Start Date 11/18/22	6255	Click Convert Edit Pending Worker Cancel Work Relationship Include in Autoconversion	
Vivienne Sullivan Planned Start Date 11/18/22	6254	Exclude from Autoconversion Employment Start Dates	
Adelyn Cole Planned Start Date 11/18/22	6253		
Ibrahim Conley Planned Start Date 11/8/22	6252		
Eret Trujilo Planned Start Date 1/////22	6251	· · · · · · · · · · · · · · · · · · ·	—

From the **Convert Pending Worker** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**

= vision	${\bf Q}_{\rm c}$ Search for people and actions			습 ☆ ᄆ 🕫 🧃
JS Jalen Santiago				Continue Cancel
	Select t What info do y	he boxes	Click Continue	
Commu	nication Info	Legislative Info	Citizenship Info	
Passpor	t Info	Visas and Permits	Family and Emergency Contacts	
I Maintai	n Managers Work Relationship Info	Payroll Details	Salary	
Compe	Add Direct Reports	Comments and Attachments		

Enter the information in the When and Why section, then click Continue

= vision	${\sf Q}_{{\sf c}}$ Search for people and actions		
Convert Pending Worker Jalen Santiago			Submit Cancel
When and W	Vhy Enter the	belowinformation	
*When is the employee 1/12/24	hire date?	Why are you hiring an employee? Hire to fill vacant position	
Legal Employer US1 Legal Entity		Why are you making changes to direct reports?	
*What's the way to com	vert a pending worker?	Work Relationship Type	
		Continue	
	Click Continue		
 Personal Det 	tails		
③ Communica	tion Info		
(4) Addresses			

Follow this same process and complete the information in each section. The information needed in each section will depend on wer configurations. We can also edit the information in each section by clicking **the pencil icon**. We can add information by clicking **Add**. Once we have added the information in the sections below, click **Submit**. The Pending Worker has been converted to the proposed worker type

JS Convert Pend	ing Worker		Submit Cancel
	(1) Employment Details	Click Submit	
	(2) Maintain Managers		
	(3) Work Relationship Info		
	(14) Payroll Betails		
	(15) Salary		
	(16) Compensation		
	(17) Add Direct Reports		
	(18) Comments and Attachments		

Hire An Employee

Navigation: Home>My Client Groups>Hire an Employee from Quick Actions>Enter Information>Submit

= vision	Q. Search for people and actions						습 🌣 Þ 🇔	
	Good morning, Cur	tis Feitty						
	Me My Team My Client Group	Me My Team My Client Groups My Reporting						
	QUICK ACTIONS	APPS Click M	y Client Groups					
	හි [*] Hire an Employee	ന്ന്	∾⁄I	圈		₽.		
	B Change Working Hours		Person Management	}∠==_ Person Spotlight		Time Management	000	
	Change Assignment							
	ଞ୍ଚି Change Manager	1 0%	ති	\bigcirc	81		1	
000 0	∯⁄/ Termination	Compensation	Profiles		Workforce Structures	Payroll	000 0	
0	∑y Transfer	O	ţ	ഹ്ത				
	Checklist Templates	Workforce Predictions	C Data Exchange	Communicate	+			
San Start	800 Act as Proxy Manager							

From the home screen, click **My Client Groups**

Next, from the Quick Actions click Hire an Employee

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	Good afternoon, C	Curtis Feitty					A CONTRACTOR
000000	Me My Team My Client Gr	oups My Reporting					0 0 0 0 0
Click Hire an Employee	QUICK ACTIONS	APPS					0 00 000
	Hire an Employee	එරි Hiring	Person Management	Person Spotlight		Time Management	
	E Change Manager	Compensation	Profiles	(D) Learning	Workforce Structures	Payroll	
	िंग Transfer क्रि Checkist Templates क्रिंग Act as Proxy Manager	Workforce Predictions	Data Exchange	Communicate	+		
1. Section	Show More						

From the **Hire an Employee** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**

= vision	Q Search for people and actions	습 ☆ 卪 🕫 😭
Hire an Employee		Continue
	Select; the boxes What info do you want to manage?	
Communication Info	Addresses Zegislative Info	Citizenship Info
Passport Info	Driver's Licenses Visas and Permits	Family and Emergency Contacts
Assign Managers	Work Relationship Info	Salary
Compensation	Add Direct Reports	

Enter the information in the When and Why section, then click Continue

= vision	Q Sear	ch for people and actions		○☆┍.☆
Hire an Employee				Submit Cancel
0	When and Why	Enter the	below/information	
	"When is the employee hire date? \n2224 Legal Employer USI Legal Entity "What's the way to hire an employee? Hire	66) ~	Why are you hiring an employee? Hire to fill vacant position v Why are you making changes to direct reports? Select a value v	
0	Click Conti Personal Details	nue	Continue	
3	Communication Info			
0	Addresses			
(5)) Leaislative Info			

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. We can add information in each section by clicking **Add**. Once we have added the information in the sections below, click **Submit**. The employee has been hired as of the employee hire date.

Hire an Employee		Sub <u>m</u> it Cancel
	(1) Employment Details	
	(19) Assign Managers	
	(13) Work Relationship Info	
	(i) Payroll Details	
	(15) Salary	
	(6) Compensation	
	⑦ Add Direct Reports	
	(18) Comments and Attachments	

Correct The Hire Date of An Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions> Work Relationship>Edit>Update Information>Submit

From the home screen, click My Client Groups

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	QUICK ACTIONS	APPS Click M	y Client Groups				
	Hire an Employee	ĥų	Scale Contraction	風		₽₽.	
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000000	Change Assignment						
0,0000	Change Manager		ති	\bigcirc	æ/		0,00,00
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Next, click Show More

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	Good morning, Curtis Feitty Me My Team My Client Groups My Reporting						00000
	QUICK ACTIONS	APPS					
	ලි* Hire an Employee මූ Change Working Hours භී/ Change Assignment	ජීතී Hiring	Person Management	Person Spotlight		Time Management	
	월 Change Manager 양/ Termination	Compensation	Profiles	D Learning	Workforce Structures	Payroll	
	砂 Transfer 語 Checklist Templates 級 Act as Proxy Manac <mark>Click Show M</mark>	Workforce adictions	Data Exchange	Communicate	+		
	Show Mare						

Scroll down and under **Employment**, click **Work Relationship**. As a note, we can search **Work Relationship** by clicking Ctrl F

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STANDARD CONTRACTOR	Employment				
Lou de la Statistica de la companya	Act as Proxy Manager	හුීළු Add Assignment	Additional Assignment Info	Additional Person Info	0.0
0 0 0 0		Areas of Responsibility	Benefit Life Events	Cancel Work Relationship	0 0 0 0 0 0
	🖓 Change Assignment	🖓 Change Legal Employer Dashboard		ම් Change Manager	00 0 0 00
		Change Working Hours	Checklist Templates		0 0 0 0 00
	🖉 Create Work Relationship	8 Direct Reports		韶 Eigible Jobs	
	🖅 Employment Contracts	🔐 Employment Info	🖗 Employment Start Dates		0000000
	Hire an Employee			Manage Job Offers	2 a 0 a 0 a 0 a 0 a
	Manage User Account	Mass Download of Document Records	👷 Mass Legal Employer Change	Nudge Configuration	100000
000	Person	O Person Identifiers for External Applications			0000
0 0		Promote and Change Position	🛗 Seniority Dates		
	Work Relationship	8 Workforce Modeling			
	Transaction Configuration and Audit	Click Work Relationship			
	- 178 unut				

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

= vision		${\sf Q}_{\sf c}$ search for people and actions	습 ☆ ᄆ 🧈 🔋
< Work Relationship			
		John v	
		Advanced Search John	
	Direct Reports	Name Business Title Work Email	Person A Number
	Carli Lavelle	John Cameron Head of UK Banking JOHN.CAMERON_etar-dev1@oraclepdemos.com	3672
	Human Resources Administra	to Soft John Lee Consultant JOHN.LEE_etar-dev1@oraclepdemos.com	42
	Halle Justus	John Fox E2104 ichn fox etar-devt@oraclepdemos.com	2104
		John Dunbar Administra Click Employees Name	9
	Hope Hightower	John Schneider Administrative Assistant JOHN.SCHNEIDER_etar- dev1@oraclepdemos.com	674
	Sue Eden	Sue.Eden_etar-dev1@oraclepdemos.com	
	Product Design Engineer	1-906-376-0396	

From the **Edit Work Relationship** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**

vision	Q Search for people and actions
Edit Work Relationship	
	Select the boxes
	What info do you want to manage?
	Work Relationship Info

Enter the information in the **Start Date and Primary Info** section. To update the hire date, change the **Legal Employer Start Date** then, click **Continue.**

= vision	${\bf Q}_{\rm c}$ Search for people and actions	1	습 & ᄂ 🍓 🔋
Edit Work Relations	ship		Submit Cancel
1 St	art Date and Primary Info Update the below information		
Legal L USI L Count United	Imployer 'Legal Employer Start Date gal Entity 5/79/05 Y 5/28/05	(b)	
Enterp 5/19/0	rite Start Date Primary 5 Continue		
2 W	Click Continue		
3 60	omments and Attachments		
Assign	ment	×	
Senior	ity Dates	~	—

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The hire date for this employee has been updated.

= vision	\boldsymbol{Q}_{i} . Search for people and actions		습 & 됸 🕫 🔋
Edit Work Relationship		Click Submit	Submit Cancel
① Start Da	ate and Primary Info	🖉 Edit	
 Work R 	elationship Info	🖉 Edit	
3 Comm	ents and Attachments		
Comments		Comments	
Attachments			
	Drag files here or click to add attachment 🐱		

Promote An Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions> Promote or Promote and Change Position>Enter Information>Submit

From the home screen, click **My Client Groups**

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	QUICK ACTIONS	APPS Click N	ly Client Groups				
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	Change Working Hours		Person Management	Person Spotlight		Time Management	
0 0 0 0 0 0 0 0	Change Assignment						
	Change Manager		[∞]				
0 ⁰⁰ 0 0 0	©g⁄ Termination	Comparisation		tearing	Structures		
0	Checklist Templates	Q	ţţ	HP			
	Act as Proxy Manager	Workforce Predictions	Data Exchange				

Next, click **Show More**

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	Good morning, Cu	rtis Feitty					
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	ෆ්" Hire an Employee	සිං	⊳⁄⁄/	Æ		i∰,	
	Change Working Hours		Person Management	Person Spotlight		யது Time Management	
	හ් Change Assignment		0				
	By Termination	Compensation	Profiles	Learning	Workforce Store burst	Payroll	
	💱 Transfer				Juccules		0 0 0
	Checklist Templates	Q	ÛÛ.	HD	+		
	Act as Proxy Manag	More	Data Exchange	Communicate			
	Show More						

Scroll down and under **Employment**, click **Promote**. As a note, we can search **Promote** by clicking Ctrl F. Alternatively, we can click **Promote and Change Position** if the promotion would include a position change

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-0,00	Employment				0 000
	Act as Proxy Manager		Additional Assignment Info	Additional Person Info	00 0000
	Allocate Checklists	Areas of Responsibility	Benefit Life Events	Sancel Work Relationship	0 0 0 0
	Change Assignment	👷 Change Legal Employer Dashboard	De Change Location	별 Change Manager	
	🔓 Change Photo		Checklist Templates		
	🖅 Create Work Relationship	By Direct Reports		园 Eligible Jobs	
0.000				Family and Emergency Contacts	
	어. Hire an Employee	ldentification Info	🖞 Local and Global Transfer	Manage Job Offers	
	Manage User Account	Mass Download of Document Records		Nudge Configuration	
Click Promote		O Person Identifiers for External Applications	Arrson Spotlight	Personal Details	
	Promote	Promote and Change Position	Seniority Dates		
	යි. Share Personal Info				
and the second	😽 Work Relationship	8 Workforce Modeling			

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

Direct Reports John Cafi Lavele John Human Resources Administration John Cameron Head of LK Banking John CAMERON, etai-dev1@oraclepdemos.com 9572 Main Burness Tile Work Email Resource 9572 Main Burness Tile Work Email Resource 9572 Main Burness Tile User Landow 1 @oraclepdemos.com 9274 Main Burness Tile User Landow 1 @oraclepdemos.com 9274	Person Number 3.00m 3672 42 2104
Search Person John Advanced Search John Violated Search John Direct Reports Name Business Tile Work Email Person Open Carli Lavelle John Cemeron Head of UK Banking JOHN CAMERON_etair devt @practedpdemps.com 4072 Open Carli Lavelle Open Consultant JOHN CAMERON_etair devt @practedpdemps.com 42 Image: Halle Justus Open Date Administrator Other E2104 Click Employees Name oraclepdemps.com 2104 Image: John Durbar Administrator JOHN DURBAR, etair-devt @practedpetmos.com 9	Person Number 3.007 3072 42 2104
Name Business Tale Viols Email Parson Direct Reports Name Business Tale Viols Email Number Image: Carli Lavelle John Cameron Head of UK Banking JOHN CAMERON_etail-devt@oradiepdemos.com 5072 Image: Carli Lavelle John Cameron Head of UK Banking JOHN CAMERON_etail-devt@oradiepdemos.com 42 Image: Halle Justus John For E2101 Click Employees Name oradiepdemos.com 9	Peran Number 1.000 3672 42 42 42
Direct Reports Name Business Tile Work Email Person Number Image: Carli Lavelle Human Resources Administratio Consultant JOHN CAMERON_etair devt@gradebdemos.com 5572 Image: Anality Administration Consultant JOHN LEE_etair-devt@gradebdemos.com 42 Image: Anality Administration E2104 Click Employees Name oradebpdemos.com 9	Peren
Carii Lavelle John Cameron Head of UK Banking JOHN CAMERON_etar-dev1@oraclepdemos.com 5672 Human Resources Administrator John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com 42 John Fox E1194 Click Employees Name oraclepdemos.com 2104 John Durbar John Durbar Administrator JOHN DUNBAR_etar-dev1@oraclepdemos.com 9	42 2104
Image: Sources Administration Image: Sources Administration	42 2104
Halle Justus John Fox E2104 Click Employees Name crackpdemos.com 2104 g John Dunbar Administrator JOHN DUNBAR_et&-dev1@gradepdemos.com 9	2104
John Dunbar Administrator JOHN DUNBAR_etar-dev1@oraclepdemos.com 9	
	UIII 9
Hope Hightower 4 John Schneider Administrative Assistant JOHN SCHNEIDER_etar- dev1@oraclepdemss.com -	674
Sue Eden Sue Eden Sue Eden etar-devl@oraclepdemos.com	
Product Design Engineer 1-906-376-0396	

From the **Promote** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**

= vision	Q Search for people and actions	☆ ₽ 🕫 🔋
Promote John Lee		Circk Continue
	Select the boxes What info do you want to manage?	
Maintain N	anagers Salary Compensation	Add Direct Reports
Comments	and Attachments	

Enter the information in the When and Why section then, click Continue

= vision	Q Search for people and actions	습 ☆ 묜 🕫 🔋
Promote John Lee		Submit Cancel
	◎ Guide Me v	
	When and Why Enter, the below information O Guide Mar	
	"When does the promotion start? Why are you promoting John Lee? (1)6/24 (%) "What's the way to promote? Promotion	
	Circk Continue	
	② Promotion	
	③ Maintain Managers	
	(Salary	P

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The promotion for this employee has been submitted.

Promote John Lee	(3) Compensation	Click Submit
	Add Direct Reports	🖊 Edit
	Comments and Attachments	
	Comments	Comments
	Attachments	
	Drag files here or click to add attachment 🐱	
	Seniority Dates	~

Terminate An Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions> Termination>Enter Information>Submit

From the home screen, click My Client Groups

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. 10. 9. 0 Martin	Good morning, Cur	tis Feitty					
0 0 0 0 0	Me My Team My Client Group						
	QUICK ACTIONS	APPS Click M	y Client Groups				
	[★] Hire an Employee	ന്ന്	No de la constancia de	圈		in the second s	
0 0 00 0	Change Working Hours	Hiring	Person Management	Person Spotlight		Time Management	
0000000	💱 Change Assignment						
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	🕎 Termination				Workforce Structures		S 0 00°
	🖅 Transfer						
	Checklist Templates	Q	Û)	HD	+		
	Act as Proxy Manager	Workforce Predictions	Data Exchange				

Next, click Show More

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000000	Me My Team My Client Group	os My Reporting					0 0 0 0 0
	QUICK ACTIONS APPS						
	හි [*] Hire an Employee	ന്പ	Cr∕t	風		Ē.	
	P Change Working Hours	Hirring	Person Management	Person Spotlight		Time Management	
	👷 Change Assignment						
	변 Change Manager	1 0%	ති	\bigcirc			
	⊠g/ Termination		Profiles		Workforce Structures		
	⊗y∕ Transfer						
	Checklist Templates			H	+		
	Act as Proxy Manag	adictions	Data Exchange	communicate			
	Show More						
			an Arste				

Scroll down and under **Employment**, click **Termination**. As a note, we can search **Termination** by clicking Ctrl F.

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	Employment				P BASE 1
Contra Martin	Act as Proxy Manager	ප්රී Add Assignment	🕎 Additional Assignment Info	Additional Person Info	A land
0 0 0 0 0		Areas of Responsibility	Benefit Life Events	Cancel Work Relationship	00000
	Change Assignment	🕎 Change Legal Employer Dashboard		Dhange Manager	00 0 0 000
		Change Working Hours	Checklist Templates		
	🖞 Create Work Relationship	8 Direct Reports		歲/ Eligible Jobs	1 1 2 0 0
	By Employment Contracts	🔐 Employment Info	🖗 Employment Start Dates		
0 0 0 0 0 0 0		kdentification Info		Manage Job Offers	
0000	Manage User Account	Mass Download of Document Records	s 🖗 Mass Legal Employer Change	Nudge Configuration	and loop of o
000	Person	O Person Identifiers for External Applications			000
0 0	Promote	Promote and Change Position	🛗 Seniority Dates		C 36
	👷 Work Relationship	B Workforce Modeling Cli	ck Termination		
	Transaction Configuration and Audit				
	The second second				

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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< Termination				
		John v	rson	
		Advanced Search John		
	Direct Reports	Name Business Title Work Email	Person A	
	Carli Lavelle	John Cameron Head of UK Banking JOHN.CAMERON_etar-dev1@oraclepdemos.com	3672	1 2 2 2 2 2 2 2 2
3 2 2 4 4 2 2 2	Human Resources Administrat	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42	경험하는 것이 않는
	Halle Justus	John Fox E2104 Click Employees Name @oraclepdemos.com	2104	
		John Dunbar Administra	9	
	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER_etar- devr@goraclepdemos.com	674	
	Sue Eden	Sue.Eden_etar-dev1@oraclepdemos.com		1997.221.21.24
	Product Design Engineer	1-906-376-0396		
				P

From the **Termination** screen, enter the information in the **When and Why** section then, click **Continue**

= vision	${\sf Q}_{{\sf c}}$ Search for people and actions		습 ☆ 묜 🕫 🔋
Terminate Work Relationship			Submit Cancel
When and Why	Enter the below	information	
*When is the termination notifi	cation date?	"What's the way to terminate the employee?	
1/16/24	ů.	Resignation	
*When does the termination tal	ke effect?	Termination Type	
1/16/24	ිම	Why are you terminating John Lee? Select a value	
The employee can see their t	ermination details when the termination type is volu	ntary.	
	7	Continue	
	Click Continue		
(2) Enter Termination	n Info		
③ Comments and A	Attachments		
Seniority Dates			

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The termination for this employee has been submitted.

John Lee	rk Relationship	Click Submit	Submit Cancel
	When and Why	🖍 Edit	
	 Enter Termination Info 	🖍 Edit	
	Comments and Attachments		
	Comments	Comments	
	Drag files here or click to add attachment 🐱		
	Seniority Dates	~	
	Need Help? Contact Us.	~	P

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The termination for this employee has been submitted.

Search For A Terminated Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions>Select Action>Advanced Search>Enter Employees Name>Inactive>Search

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Sec. 20	Good morning, Cu	rtis Feitty					and the second
0 0 0 0 0	Me My Team My Client Grou	ups My Reporting					0 0 0 0
	QUICK ACTIONS	APPS Click M	y Client Groups				
	ලි [*] Hire an Employee	സ്പ്	₽vt	쪵		₽ ₽	
0 0 00 0	Change Working Hours	Hiring	Person Management	Person Spotlight		Time Management	
000000	👷 Change Assignment						9
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From the home screen, click My Client Groups

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Scroll down and under **Employment**, click **the appliable action**. For example, if we wish to check the hire date for a terminated employee, we'd click **Employment Info**. As a note, we can search **Employment Info** by clicking Ctrl F.

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		ି ମୁନ୍ଦି Promote and Change Position	Seniority Dates	ය ර ⁴ ට Share Data Access	
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In the Search for a Person box, click Advanced Search

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Click Search for a Person			
	Search for a Person	Search Person	
Direct Reports	Advanced Search No suggestions to display Click Advance	ed Search	
Carli Lavelle Human Resources A	Iministrator	Carli.Lavelle_etar-dev1@oraclepdemos.com 1-906-384-0972	
Halle Justus		Halle.Justus_etar-dev1@oraclepdemos.com 1-576-957-5454	
Lope Hightower		Hope.Hightower_etar-dev1@oraclepdemos.com 1-847-546-9845	
Sue Eden Product Design Eng	ieer	Sue.Eden_etar-dev1@oraclepdemos.com 1-906-376-0396	

Enter the Person Name and click Inactive

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Then, click Search

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The terminated assignment(s) for the employee will generate. We can select the terminated assignment to view the details.

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Reverse A Termination

Navigation: Home>My Client Groups>Show More from the Quick Actions>Termination>Advanced Search>Enter Employees Name>Inactive>Search>Reverse

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In the Search for a Person box, click Advanced Search

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Click Search for a Person			
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Hope Hightower		Hope.Hightower_etar-dev1@oraclepdemos.com 1-847-546-9845	
Sue Eden Product Design Eng	neer	Sue.Eden_etar-dev1@oraclepdemos.com 1-906-376-0396	

Enter the **Person Name** and click **Inactive**

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Then, click Search

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John Alberico	Click Search		
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Click Employees Name

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Click Reverse

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	When is the termination notification date? 6/30/23 When does the termination take effect? 6/30/23 What is the action you would like to complete? Termination Please add your comments at the end.	Termination Type Voluntary Why are you terminating John Alberko? Work Incident or Work Related Illness		
	Termination Info Revoke User Access After termination	Recommanded for Rehire Not Specified	Edit	
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Enter the What and Why information and click Submit

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	Comments and Attachments			
	Comments Reversing employee termination due to Union Agreement		Comments	

Update Employee Address

Navigation: Home>My Client Groups>Show More from the Quick Actions>Person >Search Person>Person Information>Edit>Submit

From the home screen, click My Client Groups

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Scroll down and under **Employment**, click **Person**. As a note, we can search **Person** by clicking Ctrl F.

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Click Person	Manage User Account	Mass Download of Document Records	👷 Mass Legal Employer Change	Nudge Configuration	
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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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		Bea	rch Person	
		John v		
		Advanced Search: John		
	Direct Reports	Name Business Title Work Email	Person ^	
	Carli Lavelle	John Cameron Head of UK Banking JOHN.CAMERON_etar-dev1@oraclepdem	ios.com 3672	
	Human Resources Administra	ato John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42	
	Halle Justus	John Fox E210. Click Employees Name	2104	
		John Dunbar Administrator JOHN DUNBAR_etar-dev1@oraclepdemos	s.com 9	
	Hope Hightower	John Schneider Administrative Assistant JOHN.SCHNEIDER_etar- dev1@oraclepdemos.com	674	
	Sue Eden	Sue.Eden_etar-dev1@oraclepdemos.com		
	Product Design Engineer	1-906-376-0396		
				경험 등을 가 가 있었다.
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Next, click Edit across from the address then, click Update



Enter the Effective Start Date of the address change then click OK

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Person ©		Save 🔻	ub <u>m</u> it <u>C</u> ancel
Person Information Contacts	Documents Disabilities Extra Information		-
Name and Address	ses @	National Identifiers ∕	
Name		Edit United States Social Security Number: 104-33-1024	
First Name Lee First Name John Preferred Pronouns		Biographical Info	1
Prefix		Date of Bath	
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Honors Preferred Name		Town of Birth Correspondence Language Biolog Type	
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Addresses 🕂			
Home Address	1185 NW 47th St Manhattan, NY 10004 New York United States	Legislative Information Legislative Information Legislative Informati Legislative Information Legisla	Add Country
Primary Mailing	Home Address 1185 NW 47th St Manhattan, NY 10004	* Effective Start Date 117724 Gender Male	Edit 🔻
	New York United States	Click OK Marital Status Widowed	
Communication M	ethods ©	Edit 🔻 Highest Education Level	
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Update the applicable address details starting with the Zip Code. Once the zip code is entered, the City, State, and County will populate. Next, Click **OK**

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Person ©		Save 🔻 Submit	<u>C</u> ancel
Person Information Contacts	Documents Disabilities Extra Information		
Name and Address	es Ø	Update the applicable	
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Home Address	1185 NW 47th St Manhattan, NY 10004 New York United States	County New York	Add Country
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Click **Submit** to submit the address updates. The address will be updated as of the Effective Start Date entered

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Person @			Save V Submit Cancel	
Person Information Contacts	Documents Disabilities Extra Information		Click Submit	
Name and Address	es Ø		National Identifiers≠ Ø	
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Addresses 🕂				
Home Address	1185 NW 47th St Manhattan, NY 10004 New York United States	Edit 🔻	Legislative Information [®]	лу
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Update An Employees Work Location

Navigation: Home>My Client Groups>Show More from the Quick Actions>Change Location>Search Person>Update Information>Edit>Submit

From the home screen, click My Client Groups

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Scroll down and under **Employment**, click **Change Location**. As a note, we can search **Change Location** by clicking Ctrl F.

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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		John ~	01
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		John Cameron Head of UK Banking JOHN.CAMERON_etar-dev1@oraclepdemos.com	3672
	Carli Lavelle Human Resources Administra	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42
	Halle Justus	John Fox E21 Click Employees Name far-dev1@oraclepdemos.com	2104
		John Dunbar Administrator JUHN-00NBAR_etar-dev1@oraclepdemos.com	9
	Hope Hightower	John Schneider Administrative Assistant JOHN.SCHNEIDER_etar- dev1@oraclepdemos.com	674
승규는 고등을 수 있	Sue Eden	Sue.Eden_etar-dev1@oraclepdemos.com	
	Product Design Engineer	1-906-376-0396	
			p

Next, click What info do we want to manage? Click Continue

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Change Location		Continge Cancel
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Enter the When and Why details and click Continue

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Enter **Comments and Attachments**, if applicable, and click **Submit**

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Add or Edit A Contact or Dependent

Navigation: Home>My Client Groups>Show More from the Quick Actions>Person>Search Person>Contacts>Update Information>Edit>Submit

From the home screen, click **My Client Groups**

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Scroll down and under **Employment**, click **Person**. As a note, we can search **Person** by clicking Ctrl F

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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	Carli Lavelle Human Resources Administrato	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42
	Halle Justus	John Dunbar Administrator JOHN DUNBAR_etar-dev1@oraclepdemos.com	9
	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER_etar- devt@oraclepdemos.com	674
	Sue Eden	Inter Doublas Bruer inter doubles etar.dev/i@oraclendemos.com	1692
[고리] 수파 2부 정도가 관계	Reduct Design Engineer	1 one 276 n206	
	Product Design Engineer	0-500-570	

Select the **Contacts** tab to manage contacts. Here we can view this employees existing contacts

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Person @ Click Contacts		Save Y Submit Gancel
Person Information Contacts Documents Disabilities Extra Information Personal Relationships @		
View ▼ + Create + Create from Existing Person	e ∠Edit X Delete y Phone Address	
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To manage an existing contact, highlight the row of the contact and select **Change Start Date**, **Edit**, or **Delete** and follow the prompts to update the existing data

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Person @		Save V Submit Cancel
Person Information Contacts Documents Disabilities Extra Information		
Personal Relationships ⑦ Vew + + Create + Create from Existing Person Change Start Date / Ec Name Country Contact Type Emergency Primary Phone	it X Delete Address	
George Samuel United States Friend Columns Holden 1	Click Row	

To add a contact, click **Create.** If the contact exists in the system (another employee or a contact for another person), select **Create from Existing Person**

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Personal Relationships	dit 🕱 Delete	
Name Country Contact Type Emergency Primary Phon	P Address	
George Samuel United States Friend		

For this example, we'll click ${\bf Create.}$ Enter the information and click ${\bf OK}$

Create Contact	Enter the below/Information	
Relationship Information	Enter the below information	
Country United States	* Effective Start Date 1/18/24 0g	Benefits Offered Conditionality
* Contact Type Spouse ~	TIN Type Social Security Number	
* Emergency Contact No v		
	118 Number 221054/05	
Personal Info		
Enter basic information for the new contact. To enter more detailed information, such as additional addresses, update the contact's pers Global Moreo Language, American Envisio	on record after you create it here.	
Giotarmane Canguage Anni La guar		
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First Name Samantha		
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Name	Country	Contact Type	Emergency Contact	Primary Phone Address	
Samantha Fei	United States	Spouse		1-614-221-7843 1185 NW 47th St, Manhattan, NY 10004, New York, United States	
George Samue	United States	Friend	٢		
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Add Disability Information For An Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions>Person>Search Person>Disability>Update Information>Edit>Submit



From the home screen, click My Client Groups

Next, click Show More

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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Image: Some Eden Some Eden <t< td=""><td>1</td><td>Carli Lavelle Human Resources Administrator</td><td>Jo</td><td>hn Lee</td><td>Consultant</td><td>JOHN.LEE_etar-dev1@oraclepdemos.com</td><td>42</td><td></td><td></td></t<>	1	Carli Lavelle Human Resources Administrator	Jo	hn Lee	Consultant	JOHN.LEE_etar-dev1@oraclepdemos.com	42		
Haile Justus Ø John Dunbar Administration JOHN DUNBAR_etar-dev1@concledgemos.com 9 Image: Hope Hightower Ø John Schneider Administrative Assistant JOHN SCHNEIDER_etar- der1@concledgemos.com 674 Sue Eden Sue Eden Sue Eden etar-dev1@concledgedemos.com 469 Product Design Engineer 1-956-376-6336			Jo	hn Fox	E2104 Click Empl	oyees Name v1@oraclepdemos.com	2104		
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Product Design Engineer 1-906-376-0396	6	Sue Eden	10	hn Dounlas	Binner	iohn dountas, etar.devt@oraclendemos.com Sue.Eden_etar-dev1@oraclepdemos.com	1692	•	
		Product Design Engineer				-906-376-0396			

Select the **Disabilities** tab to manage disability information. Here we can view this employees existing disability information or we can add information. To add disability information, click **Create**

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Enter the information and click **OK**

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Click Submit

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Add or View Employee Documents

Navigation: Home>My Client Groups>Show More from the Quick Actions>Person>Search Person>Documents>Update Information>Submit

From the home screen, click **My Client Groups**

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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	Carli Lavelle Human Resources Administrato	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42	
	Halle Justus	John Dunbar Administrator JOHN DUNBAR, efar-dev1@oraclepdemos.com	9	
	Hope Hightower	John Schneider Administrative Assistant JOHN.SCHNEIDER_etar- devt@oraclepdemos.com	674	
	Sue Eden	International Street St	1692	승규는 감독을 감독했다.
	Product Design Engineer	1-906-376-0396		
				

Select the **Documents** tab to manage the employee's Citizenship, Passports, Driver's License, Visas and Permits. Here we can view employees existing Citizenship Status, or we can create a new status. To create a new status, click **Create**

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Person @			Save V Submit Cancel
Person Information Contacts Documents Disabilities Extra Information			
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Enter the information and click **OK**

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US_1095C_388368_01-11-2016 19:35:42 Name US_1095C	Document Type 1095-C	Attacher 55

Click Submit

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View Employment Details

Navigation: Home>My Client Groups>Show More from the Quick Actions>Employment Info>Search Person>View Information

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From the home screen, click My Client Groups

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Scroll down and under **Employment**, click **Employment Info.** As a note, we can search **Employment Info** by clicking Ctrl F

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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		John v		
		Advanced Search:John		
	Direct Reports	Name Business Title Work Email	Person A Number	
	Carli Lavelle Human Resources Administrator	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42	
		John Fox E2104 Click Employees Name v1@oraclepdemos.com	2104	
	Halle Justus	John Dunbar Administrator JOHN.DUNBAR_etar-dev1@oraclepdemos.com	9	
	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER_etar- dev1@oraclepdemos.com	674	
	Sue Eden	Inter Inter Inter Inter Inter International Suc.Eden_etar-dev1@oraclepdemos.com	1692 *	
	Product Design Engineer	1-906-376-0396		

We can expand each section to review the information. Scroll down to view **Employment Information**.

< Employm John Lee	ent Info		Actions ~
	Consultant	42	
	Business Title Consultant	Workspace Category	
	Department Consulting East US	Context Value	
	Managers Amy Martin	Line Manager	
	Manager Manager		
	Salary	v	
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	Employment History		

View the information. We can click the **Action Name** to view the details

< Employm	ent Info Oppartment Comulting East US	Context Value	Actions v
	Managers	Line Manager	
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	Additional Compensation	~	
	Seniority Dates	~	
	Employment – Click Action Name	Start Date 5/19/05	-

We can now view the details associated to this Action

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	Summary of Employment Change	s on 5/19/05		
김 유민 가슴 공장 가 가 가 있을	What Changed	After	Before	
	Primary Work Relationship	Yes		
	Legal Employer	US1 Legal Entity		
	Reason Code	Hire to fill vacant position		
	Assignment Number	E42		
	Assignment Status	Active - Payroll Eligible		
	Person Type	Employee		
	Primary Assignment in Primary Work Relationship	Yes		
	Primary Assignment	Yes		
	Business Unit	US1 Business Unit		
	Synchronize from Position	No		—
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Update Salary

Navigation: Home>My Client Groups>Show More from the Quick Actions>Change Salary>Search Person>Update Information>Submit

From the home screen, click My Client Groups

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Scroll down and under **Compensation**, click **Change Salary**. As a note, we can search **Change Salary** by clicking Ctrl F

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	Balance Definitions	🛞 Batch Parameters	🛞 Benefit Balances	Change Salary	00 0 0 00
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	Configure Actions	🛞 Configure Compensation History	🛞 Configure Global Settings	🛞 Configure Market Composites Display	0 0 0 0 0
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CARGE STREET		Review Proposed Progressions and Salary Updates	Review Proposed Salary Changes and Rate Values	🛞 Run Batch Processes	
	Run Grade Step Progression			තිලීල Salary History	
	🛞 Salary Range Differentials	[2] Simulate Salary Range	🛞 Statement Definitions	[2] Stock Grants	

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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	Direct Reports	Name Business Tide Work Email	Person A Number	
	Carli Lavelle Human Resources Administra	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42	
	Halle Justus	John Dunbar Administrator JOHN DUNBAR_etar-dev1@oraclepdemos.com	9	
	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER_etar- devf@oraclepdemos.com	674	
	Sue Eden	International Sector Superside Contraction	1692	방송 가 있는 것 같아요.
	Product Design Engineer	1-906-376-0396		

Enter the information in the When and Why section then, click Continue

= vision	Q_{c} Search for people and actions		습 수 두 🕫 🔋
Change Salar John Lee	y		Submit Cancel
	When and Why Enter the	below/information	
	*When does the salary change start?	*What's the action name? Change Salary > Why are you changing the salary for John Lee?	
	Olick Capitava	Continue	
	 Salary Details 		
	③ Document Records		
	④ Comments and Attachments		

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The salary change for this employee has been submitted.

Change Salar	у		Submit
John Lee	① When and Why	Submit	
	 Salary Details 	/ Edit	
	 Document Records 	🖊 Edit	
	Comments and Attachments		
	Comments]	
	Attachments		
	Drag files here or click to add attachment 🐱		

View Salary And Compensation History For An Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions>View Compensation History>Search Person>View Information

From the home screen, click My Client Groups

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Next, click Show More

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	QUICK ACTIONS	APPS						
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	👷 Change Assignment							
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	Act as Proxy Manag	adictions	Data Exchange	communicate				
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Scroll down and under **Compensation**, click **View Compensation History**. As a note, we can search **View Compensation History** by clicking Ctrl F

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Statistics of the second	🛞 Compensation Categories	පිටුලි Compensation Info		R Compensation Types	0.90
	🔐 Configure Actions	🛞 Configure Compensation History	🛞 Configure Global Settings	🛞 Configure Market Composites Display	0 00
000000	Configure Total Compensation Global		R Download Salaries	Bernents	0 0 0 0
	🙊 Eligibility Profiles	🛱 External Data	品/ Fast Formulas	By Generate Printable Statements	
	🛞 Generate Statements	Global Models	🛞 Grade Step Progression Settings	Handra Composites	97.00.0
	🙊 Import Survey	B Individual Compensation	🛞 Individual Compensation Plans		0.000
	👷 Manage Grade Rates	🛞 Manage Grades		Arket Segments	
0 000 0 0 0	R Manitar Processes	Printable Statement Templates	Profile Rating Models	R Progression Grade Ladders	
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0 ^{°°0} 0°0	🛞 Run Grade Step Progression	🛞 Run Rates-based Salary Process		認力 Salary History	0.00
	🛞 Salary Range Differentials	[2] Simulate Salary Range	🛞 Statement Definitions	翻 Stock Grants	
		Click View Compensation	on History ved Tables	🔀 View Administration Reports	
THE REAL PROPERTY OF	20% View Compensation History	😽 View Generated Statements	Wiew Market Composites	View Total Compensation Statement Reports	
	R Workforce Compensation Plans				

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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< Person				
		John v	erson	
		Advanced Search John		
	Direct Reports	Name Business Tide Work Email	Person A Number A	
	Carli Lavelle Human Resources Administra	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42	
	Halle Justus	John Dunbar Administrator JOHN DUNBAR_etar-dev1@oraclepdemos.com	9	
	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER_etar- devt@oraclepdemos.com	674	
	Sue Eden	Sue.Eden etar-dev1@oraclepdemos.com	1692	
	Product Design Engineer	1-906-376-0396		

Here we can view the employees **Compensation History**

= vision	Q Search for people and actions			Ĺ]☆₽	a 🕫
✓ View Compensation Histo	ory: John Lee					
Currency = US Dollar	View the Compensation history below					
Compensation		2024	2023	2022	2021	2020
✓ Salary Overall Salary ()		96,000.00	96,000.00	96,000.00	96,000.00	96,000.00
Annual Salary ()		96,000.00	96,000.00	96,000.00	96,000.00	96,000.00
Percentage Change						
Other Compensation						
Recurring Payments						
 Rates are as of December 31 of the noted year except curre 	ent year. The last payment is shown for recurring payments.					
				P	3	

Change Working Hours

Navigation: Home>My Client Groups>Show More from the Quick Actions>Change Working Hours>Search Person>Update Information>Submit

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	양 * Hire an Employee 훕 Change Working Hours	තීර Hiring	Person Management	Person Spotlight		Time Management	
	 Change Manager Termination 	Compensation	Profiles	(D) Learning	Workforce Structures	Payrol	
0 0	िंग Transfer क्रि Checklint Templates क्रिंग Act as Prany Manager	Workforce Predictions	Data Exchange	Communicate	+		
	Show More						

From the home screen, click My Client Groups

Next, click **Show More**

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0000	→ ⊗y⁄Transfer				Structures		0 00 0
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Scroll down and under **Employment**, click **Change Working Hours**. As a note, we can search **Change Working Hours** by clicking Ctrl F

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a not the	8 Act as Proxy Manager	ല്ല് Add Assignment	👷 Additional Assignment Info	Additional Person Info	and the second is
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	Of Change Assignment	👷 Change Legal Employer Dashboard		Change Manager	00 0 0 00
	لَيْ Change Photo	E Change Working Hours	Checklist Templates		
	Create Work Relationship	Direct Reports	Click Change Working Hour	S Eligible Jobs	
	👷 Employment Contracts	🕎 Employment Info	Employment Start Dates		SIS 9 0 000
00000000	ි [#] Hire an Employee	B Identification Info		Manage Job Offers	
	Manage User Account	Mass Download of Document Records	Mass Legal Employer Change	Nudge Configuration	
10 ⁰ 0 0	Person	Person Identifiers for External Applications	연 Person Spotlight	Personal Details	000
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					1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	87 Work Relationship	8 Workforce Modeling			
	Transaction Configuration and Audit				—

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

rson		Servit Dance		
		non v		
		Advanced Search: John		
	Direct Reports	Name Business Title Work Email	Person A Number	
	Carli Lavelle Human Resources Administrato	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42	
	A	John Fox E2104 Click Employees Name v1@oraclepdemos.com	2104	
	Halle Justus	John Dunbar Administrator JOHN.DUNBAR_etar-dev1@oraclepdemos.com	9	
	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER_etar- dev1@oraclepdemos.com	674	
	Sue Eden	Iohn Dountas Buver Iohn dountas etar.devi@ioraclendemos.com Sue.Eden_etar-devi@ioraclepdemos.com	1692 *	
	Product Design Engineer	1-906-376-0396		

From the **Change Working Hours** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by our team. Click **Continue**

= vision	Q search for people and actions	
Change Working Hours		Continue Cancel
	Select the boxes What info do you want to manage?	
	Salary Compensation Comments and Attachments	

Enter the information in the When and Why section then, click Continue

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Change Worl	king Hours	Subgrit Carred
	When and Why	
	*When does the work hours change start? Why are you changing the work hours?	
	What's the way to change the working hours? Working Hours Change	
	Continue	
	Working Hours	
	③ Salary	
	(Compensation	
	(5) Comments and Attachments	m

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The working hours change for this employee has been updated.

Change Worki John Lee	ng Hours ③ Salary	Click Submit	Submit Cancel
	(Compensation	🖊 Edit	
	Comments and Attachments		
	Comments	Comments	
	Attachments		
	Seniority Dates	×	
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Manage Line Managers For Employees

Navigation: Home>My Client Groups>Show More from the Quick Actions>Change Manager>Search Person>Update Information>Submit

From the home screen, click **My Client Groups**
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	Change Assignment						0 • 0 • 0
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	vy termination						0.00 ¢
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Next, click Show More

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0000	Diange Manager	B	Ř	\bigcirc	a /		100000
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	Act as Proxy Manag	ore					
	Show More						

Scroll down and under **Employment**, click **Change Manager**. As a note, we can search **Change Manager** by clicking Ctrl F

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	Good morning,	Curtis Feitty			
0 0 0 0 0 0	Me My Team My Clie		0 0 0 0 0 0		
	← Show Less Employment				
	😹 Act as Proxy Manager	හීඒ Add Assignment			0 / 0 0 0 0 0
	Allocate Checklists	Contract Areas of Responsibility	Benefit Life Events	最少 Cancel Work Relationship	
		👷 Change Legal Employer Dashboard	P Change Location	Change Manager	
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0 ^{0°0} 0 °0	Create Work Relationship	Direct Reports		🛱 Eligible Jobs	000 g
				P Family and Emergency Contacts	
		entification Info	🕎 Local and Global Transfer	Manage Job Offers	
TOTAL STATES		Mass Download of Document Record:	: 🖞 Mass Legal Employer Change	, Nudge Configuration	
	Person	Applications	Person Spotlight	Personal Details	

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

= vision	۹	Search for people and actions	
< Person			
	ot	Search Pers	on
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Dire	ect Reports	Name Business Tile Work Email	Person ^ Number vor.c
	Carli Lavelle Human Resources Administrato	John Lee Consultant JOHN LEE_etar-dev1@oraclepdemos.com	42
	Halle Justus	John Dunbar Administrator JOHN DUNBAR_etar-dev1@oraclepdemos.com	9
	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER _etar- devt@oraclepdemos.com	674
	Sue Eden	Lohn Dountas Buver international Successful Control Co	1692
	Product Design Engineer	1-906-376-0396	

From the **Change Manager** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by our team. Click **Continue**

= vision	Q Search for people and actions	습 🌣 Þ 👶 🚦
Change Manager John Lee	_	Continue Cancel
	Select the boxes	ontinue
	What info do you want to manage?	
	Add Direct Reports	

Enter the information in the When and Why section then, click Continue

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Change Manager John Lee				Submit Cancel
When and Why	Enterthe	below information		
*When does the manager char (/22/24 *What's the way to change the Manager Change	ige start? Co manager? V	Why are you changing the manager? Change of Location of Manager Why are you making changes to direct reports?		
	Click Continue	Continue		
2 Maintain Manag	ers			
③ Add Direct Repo	rts			
④ Comments and	Attachments			
Seniority Dates			~	P

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The manager change for this employee has been updated.

Change Manag John Lee	ger ② Maintain Managers	Click Submit	Submit Cancel
	③ Add Direct Reports	🖍 Edit	
	Comments and Attachments		
	Comments	Comments	
	Drag files here or click to add attachment v		
	Seniority Dates	~	

Manage Direct Reports

Navigation: Home>My Client Groups>Show More from the Quick Actions>Direct Reports>Search Person>Update Information>Submit

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	ලි [¥] Hire an Employee	ස්තූ	₩	යි		ti tili tili tili tili tili tili tili t	
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	Checklist Templates	Q	Û)	HD	+		
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From the home screen, click My Client Groups

Next, click **Show More**

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	ල් [*] Hire an Employee	දුරු	₩	Æ		∰.	
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	Act as Proxy Manag	adictions	Data Dunange	Continuincate			
all studies of	Show More						
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Scroll down and under **Employment**, click **Direct Reports**. As a note, we can search **Direct Reports** by clicking Ctrl F

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	Good morning, Me My Team My Clier	Curtis Feitty nt Groups My Reporting			
	← Show Less Employment				
	Act as Proxy Manager	මුළු Add Assignment			0,000,0
	Allocate Checklists		Benefit Life Events	👷 Cancel Work Relationship	
		🕎 Change Legal Employer Dashboard	P Change Location	Change Manager	
000 0	င်္သြာ Change Photo	🚊 Change Working Hours CI	ick Direct Reports	Contact Info	
0 ^{0°0} 0 ° 0	🔐 Create Work Relationship	Direct Reports		🔐 Eligible Jobs	0 00 0
				Family and Emergency Contacts	
		ldentification Info		Manage Job Offers	
STREET, SALES		Mass Download of Document Record	is 👷 Mass Legal Employer Change	Nudge Configuration	
		 Person Identifiers for External Applications 	🛱 Person Spotlight		

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

sion	C	2 Search for people and actions	
erson			
		Search Perso	
		John v	
		Advanced Search John	
	Direct Reports	Name Business Title Work Email	Person Number
	Carli Lavelle Human Resources Administrato	John Lee Consultant JOHN.LEE_etar-dev1@oraclepdemos.com	42
		John Fox E2104 Click Employees Name v1@oraclepdemos.com	2104
	Halle Justus	John Dunbar Administrator JOHN.DUNBAR_etar-dev1@oraclepdemos.com	9
	Hope Hightower	John Schneider Administrative Assistant JOHN.SCHNEIDER_etar- devt@oraclepdemos.com	674
	Sue Eden	Iohn Dountas Binner Iohn dountas etandeut @ioraclendemos.com	1602 *
	Product Design Engineer	1-906-376-0396	
1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1			

Enter the information in the When and Why section then, click Continue

= vision	\mathbf{Q}_{i} Search for people and actions	습 ☆ ᄆ 🥔 🔋
Direct Reports		Submit Cancel
When a	nd Why Enter the below information	
*When do these 1/23/24	changes start? Why are you making these changes?	
Manager Chan	pe Continge	
2 Add Dir	Click Continue ect Reports	
③ Comme	nts and Attachments	

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The direct report updates for this employee have been updated.

= vision	Q Search for people and actions	습 ☆ 🗗 🧔
Direct Reports John Lee		Submit Cancel
() W	hen and Why	Edit
 Ac 	dd Direct Reports	Edit
3 Cc	omments and Attachments	
Comm	ents	Comments
Attach	ments	A
	Drag files here or click to add attachment v	

Cancel A Work Relationship

Navigation: Home>My Client Groups>Show More from the Quick Actions>Cancel Work Relationship>Search Person>Update Information>Submit

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00000	Me My Team My Client Grou		0 0 0 0 0				
	QUICK ACTIONS	APPS Click M	ly Client Groups				
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From the home screen, click My Client Groups

Next, click **Show More**

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	💱 Transfer				Juccules		0 0 0
	Checklist Templates	Q	ÛÛ.	HD	+		
	Act as Proxy Manag	More	Data Exchange	Communicate			
	Show More						

Scroll down and under **Employment**, click **Cancel Work Relationship.** As a note, we can search **Cancel Work Relationship** by clicking Ctrl F

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	Me My leam My Client	Groups My Reporting			- And Andrews Barning
10 A.O. 10					A AND A COMPANY
0 0 0	Employment				0 0 0 0 0
000000	act as Proxy Manager				00 0 0 00
	Allocate Checklists	(a) Areas of Responsibility	Benefit Life Events	A Cancel Work Relationship	0 00 0 0
	🕑 Change Assignment	🕎 Change Legal Employer Dashboard	Change Location	Change Manager	Click Cancel Work Relationship
0 0 00 0	င်္သြ Change Photo		Checklist Templates		
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0,000,0				Family and Emergency Contacts	
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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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Carti Lavelle	
Human Resources Administrato	
John Fox E2104 Click Employees Name 1@oraclepdemos.com 2104	
John Dunbar Administrator JOHN DUNBAR_etar-der/@oraclepdemos.com 9	
Hope Hightower	
Sue Eden Sue Eden Sue Eden Sue Eden etar-devi@oraclepdemos.com	
Product Design Engineer 1-906-376-0396	

From the **Cancel Work Relationship** screen, review the **Work Relationship Info** and the **Assignment** details. As a note, if an employee has performed work for our organization, use the **Termination** quick action. If this employee has not performed work for our organization but was added into the system, continue this process. Once our review is complete, click **Submit**. This work relationship has been cancelled.

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Rehire An Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions>Create Work Relationship>Search Person>Update Information>Submit

From the home screen, click My Client Groups

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Scroll down and under **Employment**, click **Create Work Relationship**. As a note, we can search **Create Work Relationship** by clicking Ctrl F

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		Promote and Change Position	Seniority Dates		
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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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		Advanced Search: John	
	Direct Reports	Name Bushess Tills Work Email	Person A Number A
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	Halle Justus	John Fox E2104 Click Employees Name V@oraclepdemos.com	9
	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER_etar- devt@oraclepdemos.com	674
Restaurantes de la composition de la co	Sue Eden	Iohn Dountas Rever inter deut @oraclendemos.com	1692
	Product Design Engineer	1-906-376-0396	

From the **Create Work Relationship** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by our team. Click **Continue**

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Passport Info	Driver's Licenses	Visas and Permits	Family and Emergency Contacts	
Maintain Managers	Work Relationship Info	Payroll Details	☑ Salary	
Compensation	Add Direct Reports	Comments and Attachments		

Enter the information in the When and Why section then, click Continue

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US INS Legal Entity "What's the way to create the work Add Employee Work Relationship	relationship?	Verk Relationship Type Employee V	
 Personal Details 	Click Continue	Continue	
③ Communication In	0		
 Addresses 			

Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The rehire information for this employee has been updated.

Create Work	Relationship	Click Submit	Submit Cancel
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Perform A Global Transfer

Navigation: Home>My Client Groups>Show More from the Quick Actions>Local and Global Transfer>Search Person>Update Information>Submit

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From the home screen, click My Client Groups

Next, click Show More

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Scroll down and under **Employment**, click **Local and Global Transfer**. As a note, we can search **Local and Global Transfer** by clicking Ctrl F

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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	Direct Reports	Name Business Title Work Email	Person Number
	Carli Lavelle Human Resources Administrato	John Lee Consultant JOHN.LEE_etar-dev1@oraclepdemos.com	42
		John Fox E2104 Click Employees Name v1@oraclepdemos.com	2104
	Halle Justus	John Dunbar Administrator JOHN.DUNBAR_etar-dev1@oraclepdemos.com	9
	Hope Hightower	John Schneider Administrative Assistant JOHN.SCHNEIDER_etar- devt@oraclepdemos.com	674
	Sue Eden	Iohn Dountas Binner Iohn dountas etandeut @ioraclendemos.com	1602
	Product Design Engineer	1-906-376-0396	
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From the **Local and Global Transfer** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by our team. Click **Continue**

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Local and Global Transfer			Click Continue	Continue Cancel
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Person Costing	Salary	Compensation	Add Direct Reports	
Performance Goals and Documents	Absences	Benefits	Comments and Attachments	

Enter the information in the **When and Why** section. Ensure we have selected the correct **New Legal Employer for this Global Transfer** then, click **Continue**

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	Click Continue ② Transfer	Continue	
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Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The local and global transfer for this employee has been submitted.

Local and Glo	bal Transfer		Submit Cancel	
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	Need Help? Contact Us.	×		
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Add A Secondary Assignment For An Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions>Add Assignment>Search Person>Enter Information>Submit

From the home screen, click My Client Groups

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Scroll down and under **Employment**, click **Add Assignment**. As a note, we can search **Add Assignment** by clicking Ctrl F

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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 ✓ Add Assignment 			
		John v	
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	Direct Reports	Name Business Title Work Email	Person A Number
	Carli Lavelle	John Cameron Head of UK Banking JOHN.CAMERON_etar-dev1@oraclepdemos.com	3672
	Human Resources Administr	tor John Lee Consultant JOHN.LEE_etar-dev1@oraclepdemos.com	42
	Halle Justus	John Fox E2104 Click Employees Name ar-dev1@oraclepdemos.com	2104
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	Hope Hightower	John Schneider Administrative Assistant JOHN SCHNEIDER_etar- devt@oraclepdemos.com	674
	Sue Eden	Sue.Eden_etar-dev1@oraclepdemos.com	
	Product Design Engineer	1-906-376-0396	

From the **Add Assignment** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by our team. Click **Continue**

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Add Assignment			Click Continue	Continue Cancel
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Maint:	ain Managers Salary	Compensation	Add Direct Reports	
Comm	nents and Attachments			

Enter the information in the **When and Why** section. Ensure we have selected the correct **Assignment Start Date** and the **Source Assignment Status**. If adding an additional assignment, change the status to **Active- Payroll Eligible**. Click **Continue**

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Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The Add Assignment for this employee has been submitted.

Add Assignme John Lee	(e) Add Direct Reports	Click Submit	Submit Cancel
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View Employee Document Records

Navigation: Home>My Client Groups>Show More from the Quick Actions>Document Records>Search Person>View Documents

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From the home screen, click My Client Groups

Next, click **Show More**

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Scroll down and under **Employment**, click **Document Records**. As a note, we can search **Document Records** by clicking Ctrl F

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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Below, we can view the employee documents. To view the document and the details, click the **Glasses**

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End A Secondary Assignment

Navigation: Home>My Client Groups>Show More from the Quick Actions>Termination>Search Person and select Assignment to Terminate>Enter Information>Submit

From the home screen, click My Client Groups

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Scroll down and under **Employment**, click **Termination**. As a note, we can search **Termination** by clicking Ctrl F

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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name and select the assignment in which we wish to terminate

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< Termination			
		James carter v	
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		Name Business Title Work Email Person Number 🔶	
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	Halle Justus	Cater Oprea HC Rade Click Employees Name A_etar-dev1@oraclepdemos.com 2977	
	Hope Hightower	James Wong Operator JAMES WONG_etar-dev1@oraclepdemos.com 2240	
	Sue Eden	Sue.Eden_etar-dev1@oraclepdemos.com	
	Product Design Engineer	1-906-376-0396	

Enter the information in the When and Why section. Click Continue

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Terminate Work Relation	ship	Submit Cancel
• When an	d Why Enter the below information	
This termination Show Assignme	n will end 2 assignments. ent Details	
"Whan is the term [27/24 "When does the to [2/29/24	ination notification date? * What's the way to terminate the employee? Resignation r mination take effect? Termination Type Voluntary Why are you terminating James Carter? Exter Opportunity v	
	an see their termination details when the termination type is voluntary.	
 Enter Terr 	Click Continue	
(3) Commen	ts and Attachments	

Enter the Termination Info in this section. Click Continue

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Enter any **Comments and Attachments**, if applicable. Click **Submit.**

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The assignment will be ended as of the effective date

Create Mass Update

Navigation: Home>My Client Groups>Mass Updates>Create Mass Assignment Change>Enter Criteria>Submit

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From the home screen, click **My Client Groups**

Click Mass Updates

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From the Mass Updates screen, click Create Mass Assignment Change

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Enter the Effective Date. Next, enter the remaining Basic Details and click Next

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Create Mass Assignment C	hange: Basic Details @		t Save V Submit Cancel
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Description	Assi	Action Reason Reorganization gnments with Future Changes Show errors and exclude assignments Show warnings and include assignments	
			F

Next, we'll select the employees who will be included in this **Mass Assignment Change**. This functionality will be used to update Assignment Details, Job Details, Location Details, and Manager Details that have the same effective date. Click **Select and Add**



Enter the **Employees Name** or **Person Number** and click **Search**. Highlight the row of the employee in the results and click **Apply** to add this employee to the **Mass Update Population**

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Follow this process to add additional employees. Once complete, click ${\bf OK}$

				Basic Details	Population	Chan	ges -	/erification	Review					
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			Garcia, Mateo	4829	454-33-1310 0	ilobal Networks	Deriver oldUS1HQ	Employee	Project Manager	Active - Payroll				
			Jones, Chris	4821	F	leceivables AU	Melbourne	Employee	Receivables Sp	Active - Payroll				
			Murphy, Liam	4827	F	rogress US		Employee		Active - Payroll				
			Price, Emma	4828	F	rogress US		Employee		Active - Payroll				
			Ramos, Gianna	4826	F	rogress US		Employee		Active - Payroll				
			Robinson, Kelly	4824	F	rocurement AU	Sydney	Employee	Procurement M	Active - Payroll				
			Smith, Nicholas	4822	F	ayables AU	Perth	Employee	Payables Mana	Active - Payroll				
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ackwell, Jack	4825		Procurement AU	Sydney			Empl	oyee Buye		Active - Pa
hnson, Charles	720	WE203765C	Manufacturing UK	London			Empl	yee Prod	uct Data	Active - Pa

Enter the **Mass Assignment Changes.** For example, the new work Location. Click **Next**

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A Data Validation message will appear

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Next, Verify the updated information. Review the Status Column messages by hovering over the Icon and click **Next** and click **Submit**

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Manage Mass Updates

Navigation: Home>My Client Groups>Mass Updates>Manage Mass Assignment Change>Select Update>Edit>Submit

From the home screen, click My Client Groups

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Click Mass Updates

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From the Mass Updates screen, click Manage Mass Updates

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Next, click the Name of the update we wish to manage

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Sample Mass Update		Assignment Change	Awaiting user verific	Patrick Jones	9/19/22	0	2			
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Update the applicable information in any of the sections by updating the information and clicking **Next**. Once complete, click **Submit**

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1	Lopez, George	1018	Analyst	0	Assignment		San Juan	Corporate HQ						
Colur	mns Hidden 32													

Update Employee's Document Delivery Preferences

Navigation: Home>My Client Groups>Show More>Document Delivery Options>Search Person>Update>Save

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From the home screen, click **My Client Groups**

Next, click Show More

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Under Document Records, click **Document Delivery Preferences**

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	Art Configure Actions	🛞 Configure Compensation History	🛞 Configure Global Settings	🛞 Configure Market Composites Display	
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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

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	Q John]					
	John Cameron	E3672		de terminated work relationships	Termination Date Worker Type	Filters			
	John Lee	E42							
	John Fox	Click Employees	s Name					Sort By 💌 🔲	
	I John Dunbar	E9		Assignment Number	Assignment Status	Worker Type	Work Email	Work Phone	
	John Schneider	E674		E1912	Active - Payroll Eligible	Employee	marsha.green_etar-dev1@oraclepdemos.com	19256851209	
	John Douglas	E1692		E1929	Active - Payroll Eligible	Employee	ron.pines_etar-dev1@oraclepdemos.com		
	John Jordan	E5288		E1981	Active - Payroll Eligible	Employee	joan.brugge_etar-dev1@oraclepdemos.com	19252272347	
	Watter Gibson	HE Director	IAIA .	E1919	Active - Payroll Eligible	Employee	walter.gibson_etar-dev1@oraclepdemos.com	14167755434	
	Joseph Ballman	HE Dean	1974	E1974	Active - Payroll Eligible	Employee	joseph.ballman_etar-dev1@oraclepdemos.com	13102253423	
	JoAnn Peterson	Clinical VP	1676	E1676	Active - Payroll Eligible	Employee	joann.peterson_etar-dev1@oraclepdemos.com		
	Chun Yao	HC Nursing Director	2034	E2034	Active - Payroll Eligible	Employee	CHUN.YAO_etar-dev1@oraclepdemos.com		
	Heidi Kroft	HE Director	1924	E1924	Active - Payroll Eligible	Employee	HEIDI.KROFT_etar-dev1@oraclepdemos.com		
	Sasha McCartney	HE Director	1938	E1938	Active - Payroll Eligible	Employee	SASHA.MCCARTNEY_etar-dev1@oraclepdemos.com		
	Anne Stein	HE Supervisor	1935	E1935	Active - Payroll Eligible	Employee	anne.stein etar-dev1@oraclepdemos.com		

Click **Edit** to update the delivery preference across from the document we wish to update

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	< Document Deli John Lee	ivery Preferences			
	Preferences				
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a de la companya de l	Delivery Method Online and Paper	Online Delivery Consent Not applicable	Overridden by Person No	1	
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Select the **Delivery Method** from the dropdown menu and click **Save** to save the preferences
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	Content Deli	very Preferences				
	Preferences					
	Document Type 1095-C	Delivery Method Online and Paper	Grant Online Delivery Consent Not applicable			
		Online Paper Select	Delivery Method	Cancel		
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	Delivery Method Online	Online Delivery Consent Not applicable	Overridden by Person No	P		
	Third Party Payslip					
	Delivery Method Online	Online Delivery Consent Not applicable	Overridden by Person No	P		
	W_2					
	Delivery Method Paper	Online Delivery Consent Not applicable	Overridden by Person NO	1	-	
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Update Employee's Tax Withholding

Navigation: Home>My Client Groups>Show More>Calculation Cards>Search Person>Edit>Update Information>Submit

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From the home screen, click **My Client Groups**

Next, click Show More

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Under Payroll, click Calculation Cards

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	Costing of Elements	Costing of Jobs	Costing of Payment Sources	Costing of Payrols	
	Costing of Positions	Element Classifications		Element Security Profile	9666000
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Sector Street Street		Payroll Security Profile		Person Results	
	Personal Payment Methods	Dig Process Results Summary	QuickPay Payments	Rate Definitions	
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Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

	Jol	าท		~	_	
	Ad	anced Search John				
Direct	Reports	Name	Business Title	Work Email	Number	
	Carli Lavelle	John Cameron	Head of UK Banking	JOHN.CAMERON_etar-dev1@oraclepdemos.com	3672	
	Human Resources Administrato	John Lee	Consultant	JOHN.LEE_etar-dev1@oraclepdemos.com	42	
	Halle Justus	John Fox	E210. Click Employ	ees Name	2104	
		John Dunbar	Administrator	JOHN DUNBAR_etar-dev1@oraclepdemos.com	9	
	Hope Hightower	John Schneider	Administrative Assistant	JOHN.SCHNEIDER_etar-	674	
0	Sue Eden		2	Sue.Eden_etar-dev1@oraclepdemos.com	•	
14	Product Design Engineer		1	-906-376-0396		

Click Tax Withholding

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< Cal	lculation Cards John 42			
▲ Search				Advanced Saved Search All Calculation Cards
Calculation Card				Felt 18 4 27 28 4 57 4 5 18
*Effective As-of Date 2/6/24	<u>م</u>			Search Reset Save
▲ Search Results				
Actions • View • Format •	+ X Freeze 🐨 Detach 斗 Wrap			
Calculation Card	Description	Component Groups	Name	Effective Start Effective End Date Date
Tax Withholding	Employee withholding certificate.	Federal	US1 Legal Entity	5/19/05
Absences Columns Hidden 1	Click Tax Withholding	Absences		5/19/05
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Enter the Effective As-of Date

Lee, J	John: 42			
	*Effective As-of Date 2/6/24	9 19 HTATE TO 19 HTATA		
	Associations	Enter Effective As-of Date	· · · · · · · · · · · · · · · · · · ·	
	Federal		^	
	Calculation Component Federal Taxes Forms Federal	Start and End Dates 5/19/05	/	
	Filing Status Single	Allowances 0 Additional Tax Amount		
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	View Active ~			

Click Edit

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	*Effective As-of Date 2/6/24			
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	Federal		^	
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	Filing Status Single	Allowances 0 Additional Tax Amount		
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		There's nothing here so far.		💴 🏧

Update the applicable information and once complete, click Save and Close

ision		오 습 ☆ ᄆ ᄻ
Federal Taxes		Delete Save and Close Cancel
Basir	c Information Click Save and Close	
	alculation Component Forms ederal Taxes External	
C 1	omponent Sequence	
	When does this change start?	
	2/0/24	
With	holding status Update the applicable information below	
1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -	tep 1: Enter Personal Information	
	lote: Select Head of household only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.	
	Single or Married filing set \vee	
	complete Steps 2-4 ONLY if they apply to you. Otherwise, skip to Step 5.	
	ее кот раде с кот нике пногнамот оп еакт экер, чим кап каетирной полт импломайд. Other Octalls, alto privacy.	
5	tep 2: Multiple Jobs or Spouse Works	
	ompreter time step ir you (i) nom more than one job at a time, of (2) are married tilling jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Io only one of the following.	
	a) Reserved for future use. Note the Multiple All Worksheet on form page 3 and enter the result in Step 4(c) below or g) if there are only two jobs total, you may check this boa. Do the same on Form W-4 for the other job. This option is generally more accurate than (b) if pay at the lower paying job is more naml and if of the pay at the higher paying job. Dowings, b) is more accurate.	
	Auttiple Jobs	

Follow this same process to update the State or Local Tax Withholdings. We can click **Federal** to view the Federal W4

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Click Federal	Filing Status Single	Allowances 0 Additional Tax Amount		
	Exempt from Federal Income Tax No		~	
	Regional		+ Add v	
	View Active V	<i></i>		
		There's nothing here so far.		

Update Employee's Direct Deposit

Navigation: Home>My Client Groups>Show More>Personal Payment Methods>Search Person>Edit>Update Information>Submit

From the home screen, click My Client Groups

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Next, click Show More

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Under Payroll, click Personal Payment Methods

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	Manage Bank Branches	Manage Banks	Object Groups	Crganization Payment Methods	
0000000	Payment Method Preferences	Payroll Calculation Information	Payroll Dashboard	Payroll Definitions	0 • 0
0000	Payroll Flow Patterns	Payroll Flow Security Profile	Payroll Interface Inbound Records	Payroll Process Configuration	000000
Click Personal Payment Methods	Payroll Relationships		Payslips		0000
0	Personal Payment Methods	码。Process Results Summary		Rate Definitions	
	Review Journal Entries	Run Types		Submit a Flow	
	Third Parties	Third-Party Organization Payment Methods		Time Definitions	
	🔆 User-Defined Tables	Vacation Liability Rate Definitions	🛞 Values Defined by Criteria	View Flows	
	View Process Information Groups				

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

-	Carli		ý l	
/	Advanced Search Carli	Duning and Title	West-Count	Descen Number 6
Direct Reports	Rame	Dusiness rive	WON ETHER	Pason Number
Carli Lavelle Human Resources Administrator	Carli Lave	N4172 Human Resources Administrator	Carli.Lavelle_etar-dev1@oraclepdemos.com	4172
<u> </u>	Carling Dory	Click Employees Nam	e ng.Dory_etar-dev1@oraclepdemos.com	4525
Halle Justus	G Carla Greece	Analyst	carta.greece_etar-dev1@oraclepdemos.com	3749
Hope Hightower	CM Carlo Marrone	Finance Director	CARLO.MARRONE_etar-dev1@oraclepdemos.com	2717
Sue Eden		Sue.Eden_etar-o	ev1@oraclepdemos.com	5-1
Product Design Engineer		1-906-376-0396		

Click Add to add a new Bank Account or click Edit to Edit the existing details

VISION	ment Methods		Q	
	View payment methods as of All dates ~			
	Bank Accounts		+ Add	
	X000044321 Checking 091408501 091408501 US Bank 2/6/24 United States	Active	Click Edit	
	Payment Methods		+ Add	
	US Bank Checking Direct Deposit 2/6/24	100 %		
	View prior payment methods			

Update the applicable information. To deactivate this account, deselect the active checkbox. Click **Save**

Carli Lavelle		
View payment methods a	All dates V	
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Payment Method		
US Bank Checking Direct Deposit 2/6/24	100 %	

Add New or Additional Employee's Direct Deposit Account Navigation: Home>My Client Groups>Show More>Personal Payment

Methods>Search Person>Edit>Update Information>Submit

From the home screen, click My Client Groups

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Under Payroll, click Personal Payment Methods

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	Payment Method Preferences	Payroll Calculation Information	Payroll Dashboard	Payroll Definitions	
0000	Payroll Flow Patterns	Payroll Flow Security Profile	Payroll Interface Inbound Records	Payroll Process Configuration	0 000 000
Click Personal Payment Methods	Payroll Relationships		ဗီ Payslips		000
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	Review Journal Entries	📓 Run Types		Submit a Flow	
	Third Parties	Third-Party Organization Payment Methods		Time Definitions	
	🛞 User-Defined Tables	Vacation Liability Rate Definitions	🛞 Values Defined by Criteria	View Flows	
	View Process Information Groups				

Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name

	Advanced Search:Carli			
Direct Reports	Name	Business Title	Work Email	Person Number
	Carli Heath	N4172	Carli.Heath_etar-dev1@oraclepdemos.com	4172
Carli Lavelle Human Resources Administrator	Carli Laven	Human Resources Administrator	Carli.Lavelle_etar-dev1@oraclepdemos.com	4372
	Carling Dory	Click Employees Na	g.Dory_etar-dev1@oraclepdemos.com	4525
Halle Justus	Carla Greece	Analyst	carta.greece_etar-dev1@oraclepdemos.com	3749
Hope Hightower	CM Carlo Marrone	Finance Director	CARLO.MARRONE_etar-dev1@oraclepdemos.com	2717
Sue Eden		Sue.Eden_eta	ar-dev1@oraclepdemos.com	
Product Design Engineer		1-906-376-039	16	
Product Design Engineer		1-906-376-039	¹⁶	

Click **Add** to add a new Bank Account

Paym Carli Lav	nent Methods ^{relle}		
	View payment methods as of All dates		
	Bank Accounts		+ Add
	200094321 Checking 091405001 05 Sank 2/5/24 United States	Active Clic	k Add
	Payment Methods		+ Add
	US Bank Checking Direct Deposit 2/6/24	100 %	· · · · · · · · · · · · · · · · · · ·
	View prior payment methods		

Enter the Account Number, Account Type, Bank, Bank Branch, and Routing Number and click Save

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Wew payment methods as of All dates 🗸 🗸	
Bank Accounts	
Enter/the/below/information	
*Account Number 122456789 Click Save	
Check Digit Account Holder Caril Lavelle	
Secondary Account Reference Back Chave Rank	
Bank Branch 25/004131	
Rooting Kumber (26/09/131)	
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
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091408501 U.S.Bank 2/5/2/4	P

Under Payment Methods, click Add

Danitritecounto		T You
XXXXX6789	Active	1
Savings		
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267084131		
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2/6/24		
United States		
XXXXXX4321	Active	/
Checking		
091408501		
091408501		
US Bank		
2/6/24		
United States		
Payment Methods		+ Add
US Bank Checking	100 %	Click Add
Direct Deposit		
2/6/24		× = = = = = = = = = = = = = = = = = = =

Here we can add the Payment Method Information. We can enter a percentage or a Flat Amount that we want deposited into this account. Click **Save**

Carli Lavelle	t Methods		
	091400501 091400501 US Bank 2/6/24 United States		
	Payment Methods Enter th	ne/below/information	
	"What do you want to call this payment method? Chase Bank: Savings	Currency USD Click Save	ncel
	"Start Date 2/6/24 00 "Organization Payment Method	Amount v 100 USD Country United States	
	Direct Deposit V Payment Type Direct Deposit	*Bank Account 267084131 X000006789 Savings ~	
	US Bank Checking Direct Deposit 2/6/24	100 %	

We can view the updated Payment Method Information. For example, \$100 will be deposited into the Savings account and the remaining pay will be deposited into the Checking Account. If, for example, both accounts were checking accounts, we can click **Reorder** to change the processing order.

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XXXXX6789	Active	/
Savings		
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2670年4131		
Chase Bank		
2/6/24		
United States		
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	Click Reorder	
Payment Methods		Reorder + Add
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2/6/24		×
US Bank Checking	David for David	
03 bank checking	Remaining Pay	

We can use the **Arrows** to change the processing order of the Payment Methods and click **Save and Close**

< Reorder Carli Lavelle			Click Save and Close	Cancel
	My Payment Methods			
	Chase Bank- Savings Direct Deposit	100 USD		
	US Bank Checking Direct Deposit	Remaining Pay	Click Arrow	

Assign Areas of Responsibility To An Employee

Navigation: Home>My Client Groups>Show More from the Quick Actions>Areas of Responsibility>Search>Add>Enter Information>Submit

From the home screen, click My Client Groups

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	Service Change wanager	Compensation	Profiles	(▷) Learning	400 Workforce Structures	Payroll	
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			14-6				

Next, click Show More

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	Checklist Templates	Workforce	Data Exchange	Communicate	+			
States of the second second	Act as Proxy Manage Click Show	More						
	Show More							

Scroll down and under **Employment**, click **Areas of Responsibility**. As a note, we can search **Areas of Responsibility** by clicking Ctrl F

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	Act as Proxy Manager	හීෆී Add Assignment	Click Areas of Respons	ibility Additional Person Info	
	Allocate Checklists	an Areas of Responsibility	Benefit Life Events	🖅 Cancel Work Relationship	
		🕎 Change Legal Employer Dashboard	P Change Location	📴 Change Manager	
0,00 0 0	ြို့ Change Photo	Change Working Hours	Checklist Templates	Contact Info	Carlos L. J. o
0000	🕎 Create Work Relationship	Direct Reports		😽 Eligible Jobs	ou o
				Family and Emergency Contacts	
		B Identification Info	🕎 Local and Global Transfer	Manage Job Offers	
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Enter the **Basic Information**. Under **Usage**, we can select **Approval** and **Checklist**. If we select **Include in work contacts**, the representative's name appears as a work contact along with the representative type (Human Representative, Benefits Representative, for example). The representative's name appears in the Contacts section in the Directory and the Contact Us section. If the option is deselected the person doesn't appear in these pages.

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John Lee				
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Once we have entered the information, click Submit

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Any employees who meet the criteria as a part of the Responsibility scope, will see John Lee as the Benefits Representative once the approval workflow has been completed.

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Thank we for reviewing and using our guide; we hope we have found it helpful. If we have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version	Revision		
History	Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version
Version 2.0	8/28/2022	Megan Ketter	Added Tasks
Version 3.0	2/6/2024	Megan Ketter	Updated Screenshots
Version 4.0	2/28/2024	Megan Ketter	Added Tasks