



2024

Core HCM Admin Guide



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V3

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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.

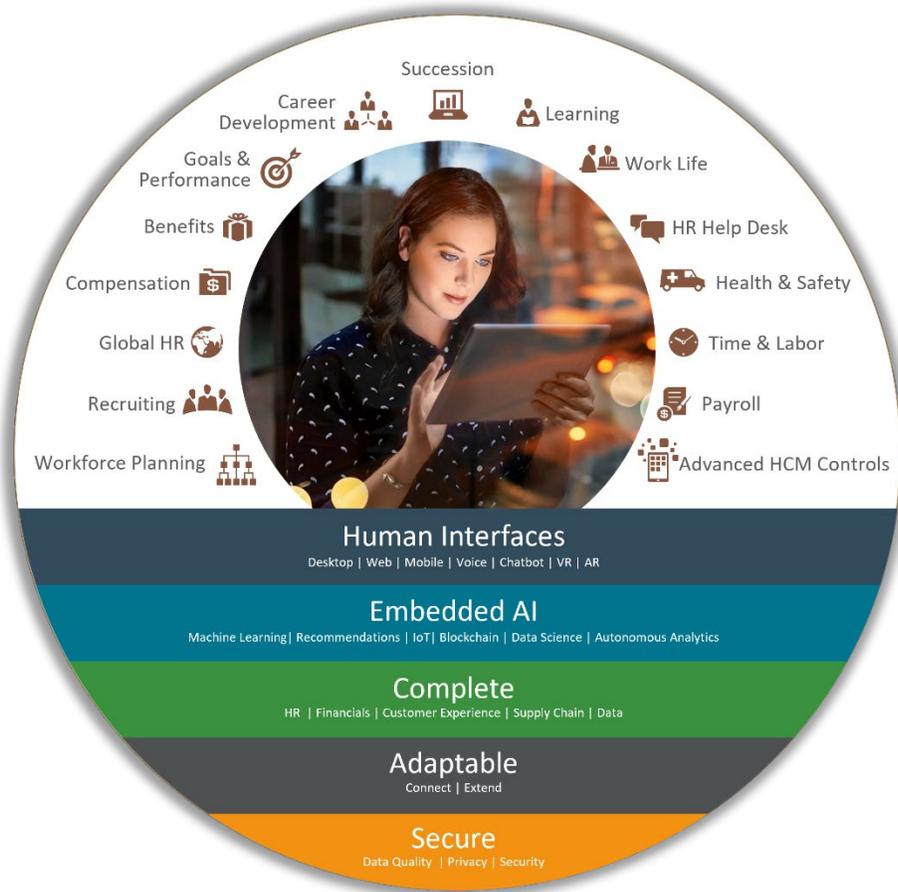
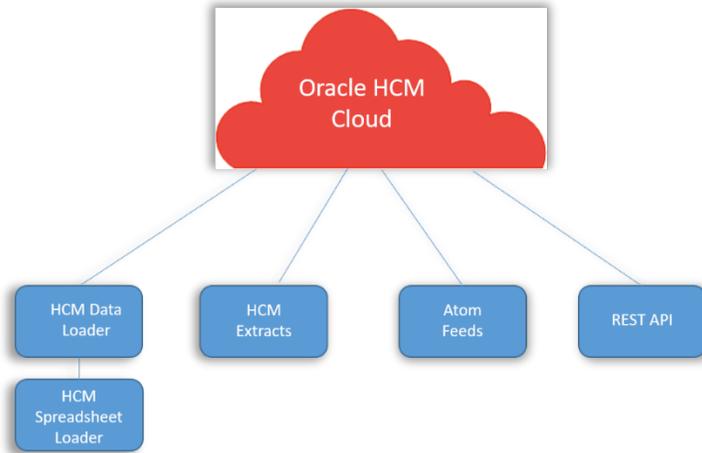
How To Use This Guide

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.

HCM

- ❖ 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

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 date-effective 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

- ❖ 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 and perform actions on behalf of an employee or approve/reject notifications.

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.

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.

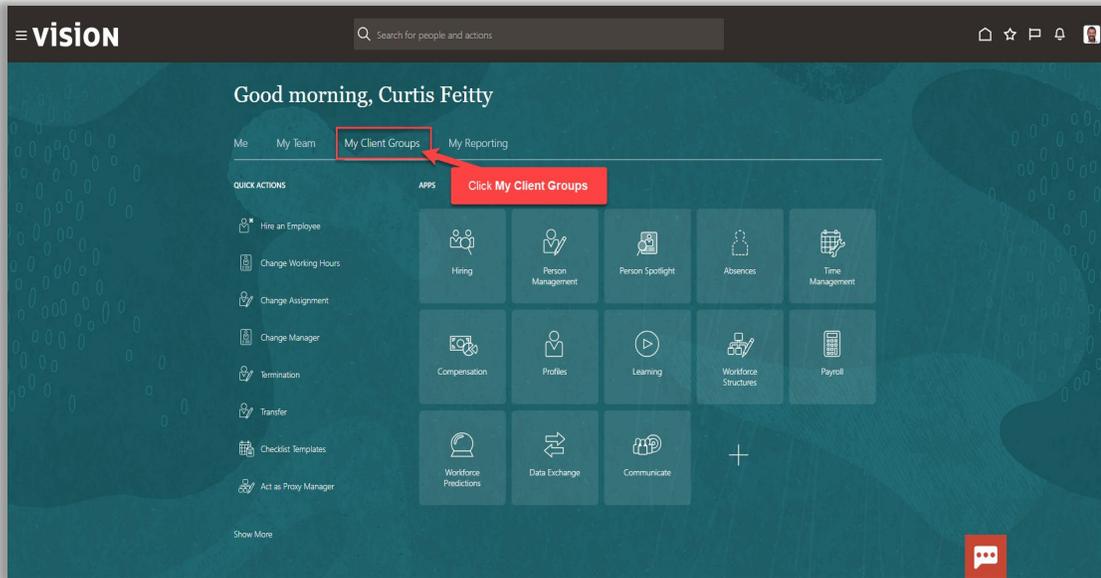
Day to Day Operations Guide

Workforce Management

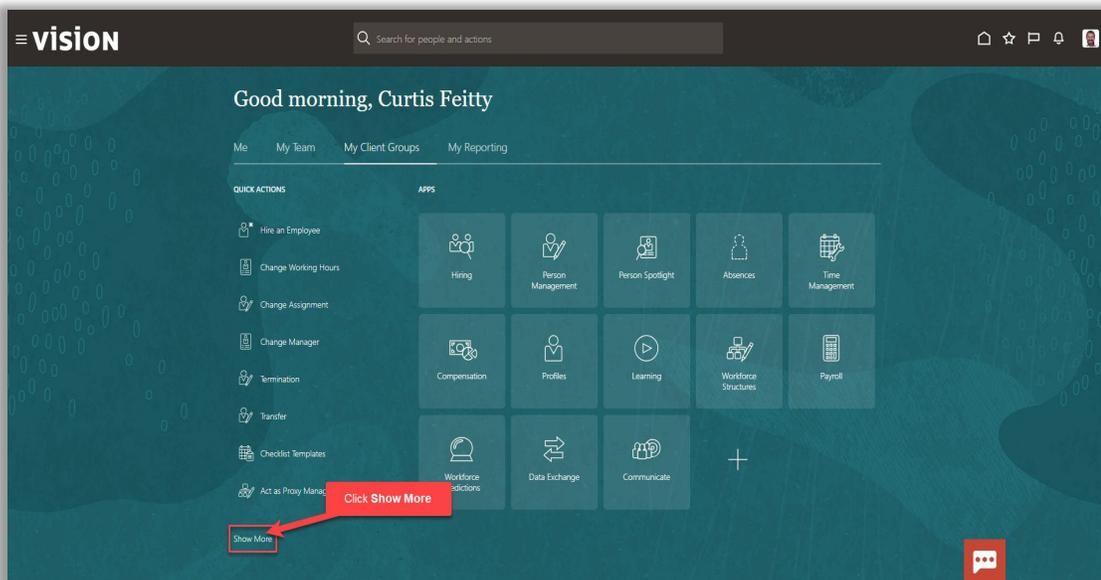
Create A Department

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

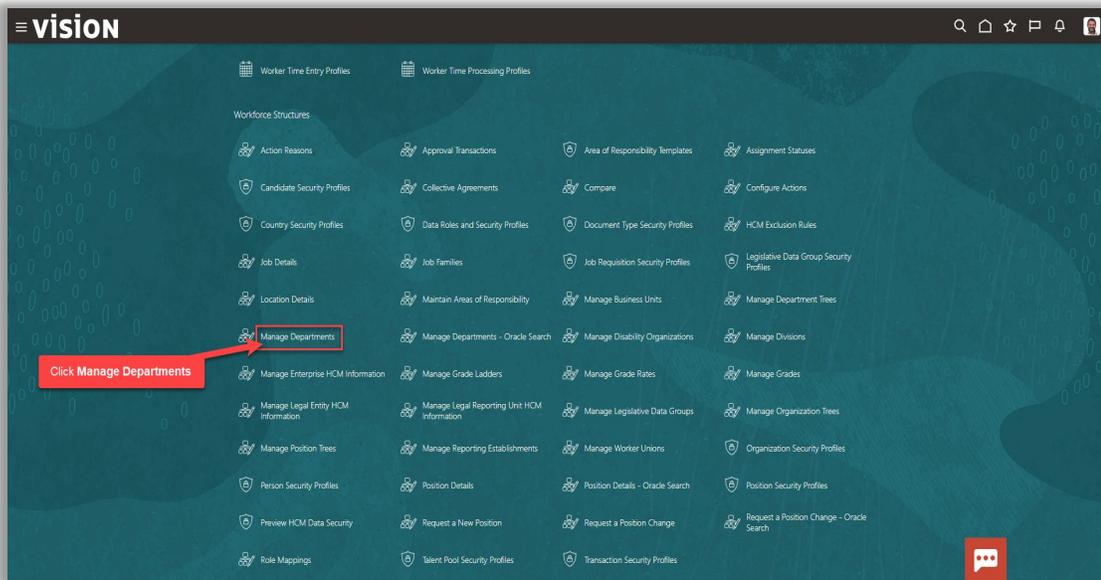
From the home screen, click **My Client Groups**



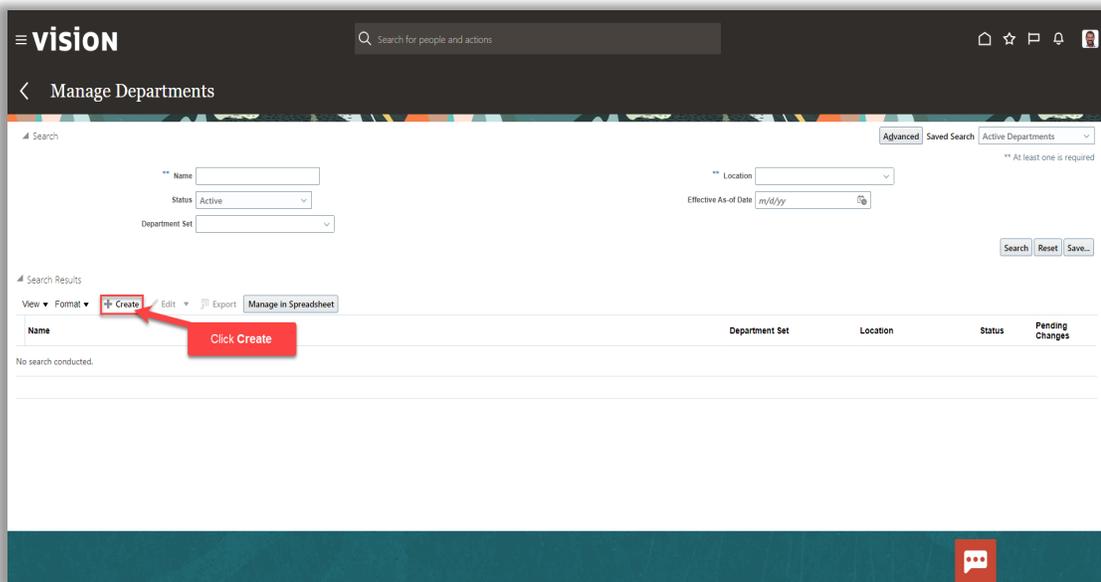
Next, click **Show More**



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



To create a department, click **Create**



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

VISION

Search for people and actions

Create Department: Description

1 Department Description 2 Department Details 3 Review

Back Next Save Submit Cancel

Create new
Select an existing organization to define as a Department

Department Description

Enter the below information

*Effective Start Date 1/1/51

*Department Set Common Set

*Name Sales - Presales

Internal Address Line

*Status Active

Context Value

Action Reason Reorganization

Location

Address

Attachments None

Once the information has been entered, click **Next**

VISION

Search for people and actions

Create Department: Description

1 Department Description 2 Department Details 3 Review

Back Next Save Submit Cancel

Create new
Select an existing organization to define as a Department

Department Description

Click Next

*Effective Start Date 1/1/51

*Department Set Common Set

*Name Sales - Presales

Internal Address Line

*Status Active

Context Value

Action Reason Reorganization

Location

Address

Attachments None

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

vision

Search for people and actions

Department Description | Department Details | Review

Create Department: Department Details

Effective Start Date: 1/1/51 | Name: Sales - Presales

Organization Information EFF: Department Details

Enter the below information

Organization Manager Information

Reporting Name:

Manager:

GL Cost Center Information

Record Identifier	Company Value Set	Company	Cost Center Value Set	Cost Center	Cost Center Manager

Work Day Information

Back | Next | Save | Submit | Cancel

Click Next

vision

Search for people and actions

Department Description | Department Details | Review

Create Department: Department Details

Effective Start Date: 1/1/51 | Name: Sales - Presales

Organization Information EFF: Department Details

Organization Manager Information

Reporting Name:

Manager:

GL Cost Center Information

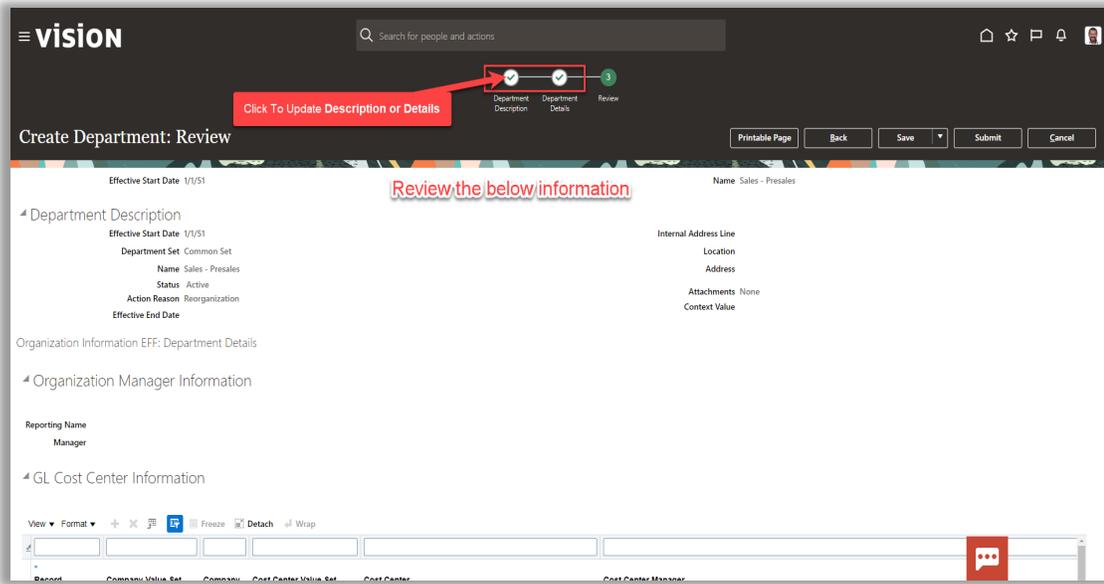
Record Identifier	Company Value Set	Company	Cost Center Value Set	Cost Center	Cost Center Manager

Work Day Information

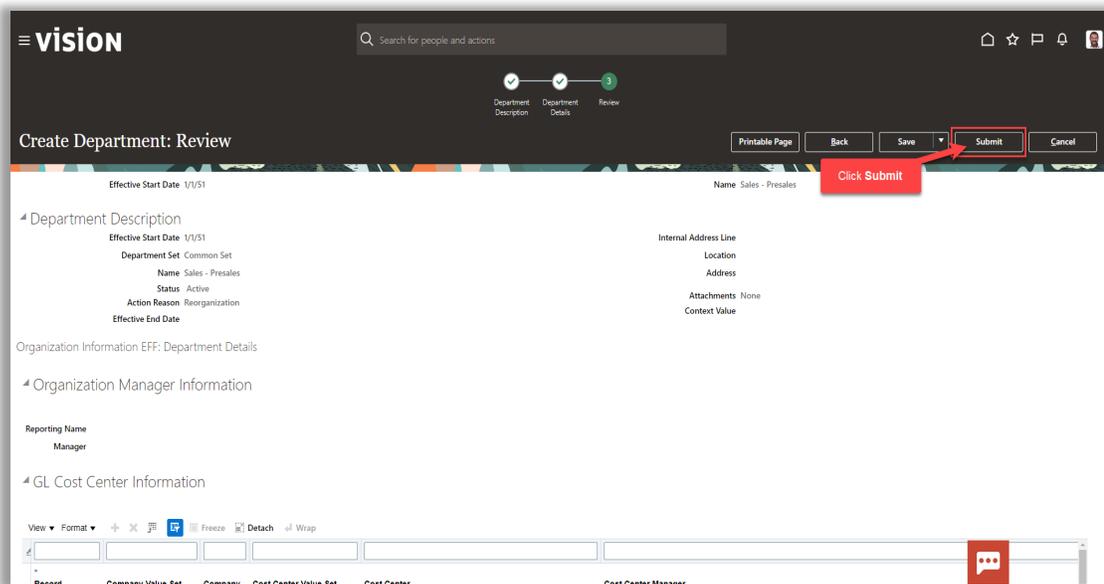
Back | **Next** | Save | Submit | Cancel

Click Next

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



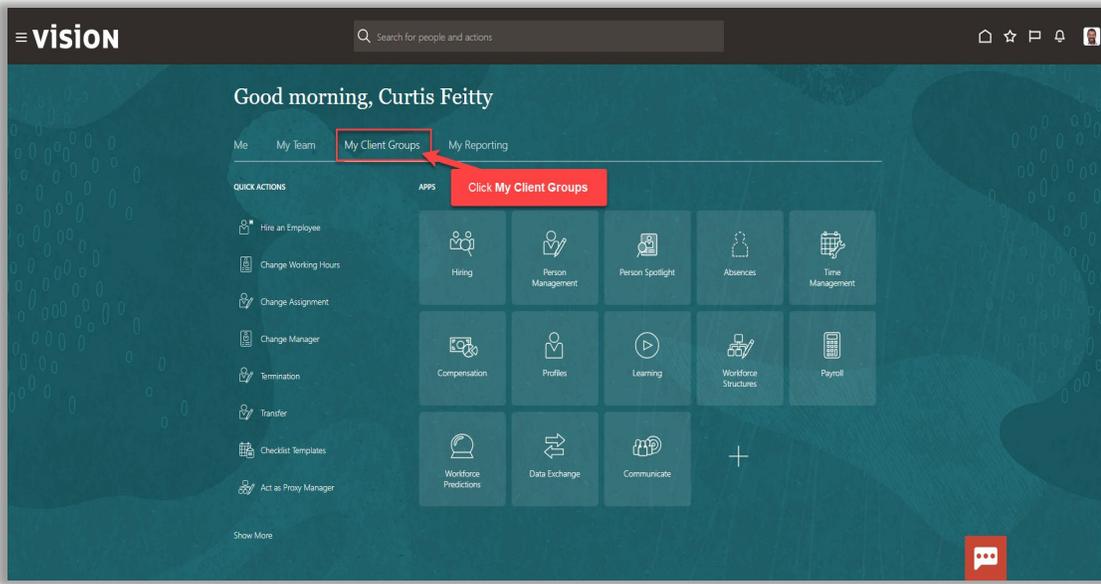
Once our review is complete, click **Submit**. The department has been created



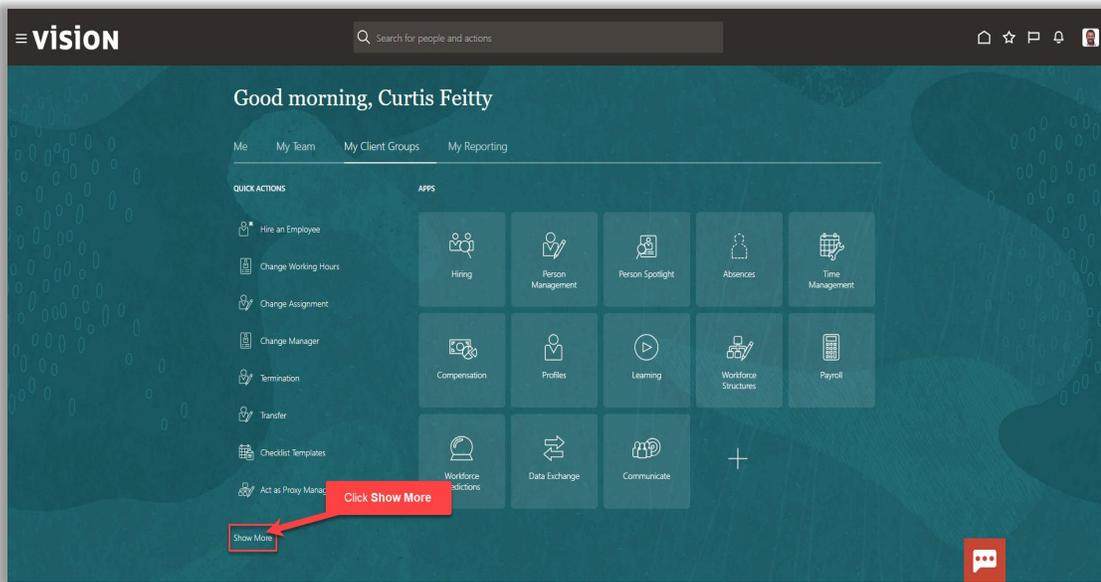
Manage Departments

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

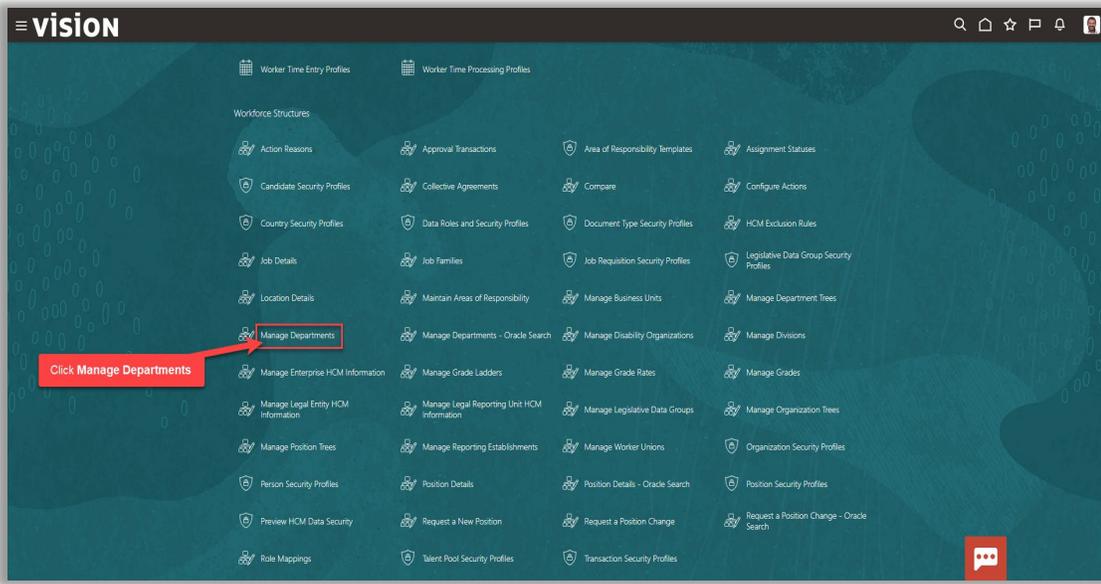
From the home screen, click **My Client Groups**



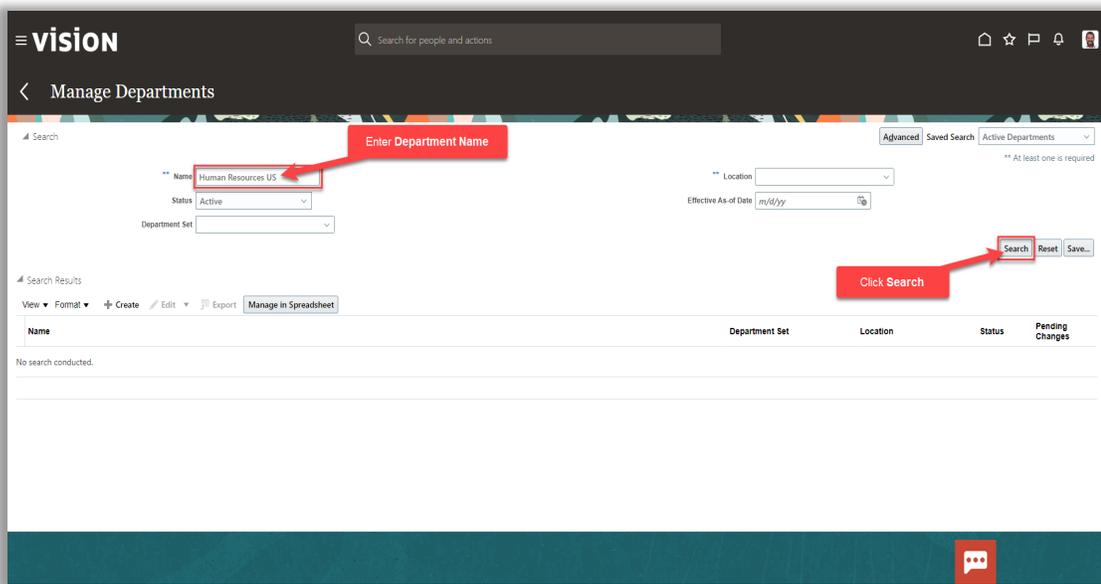
Next, click **Show More**



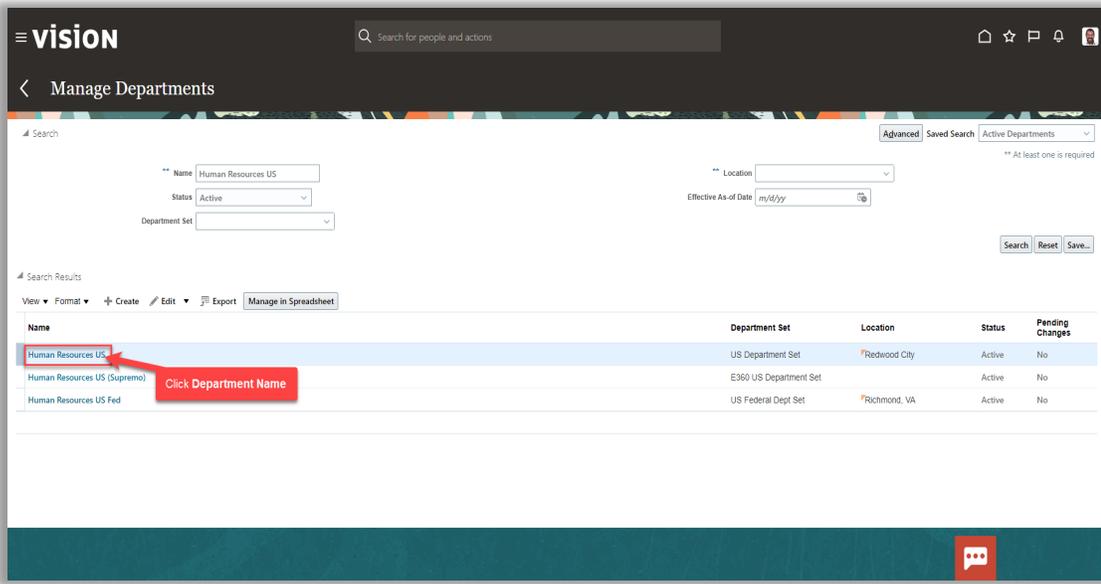
Scroll down and under **Workforce Structures**, click **Manage Departments**. As a note, we can search **Manage Departments** by clicking Ctrl F



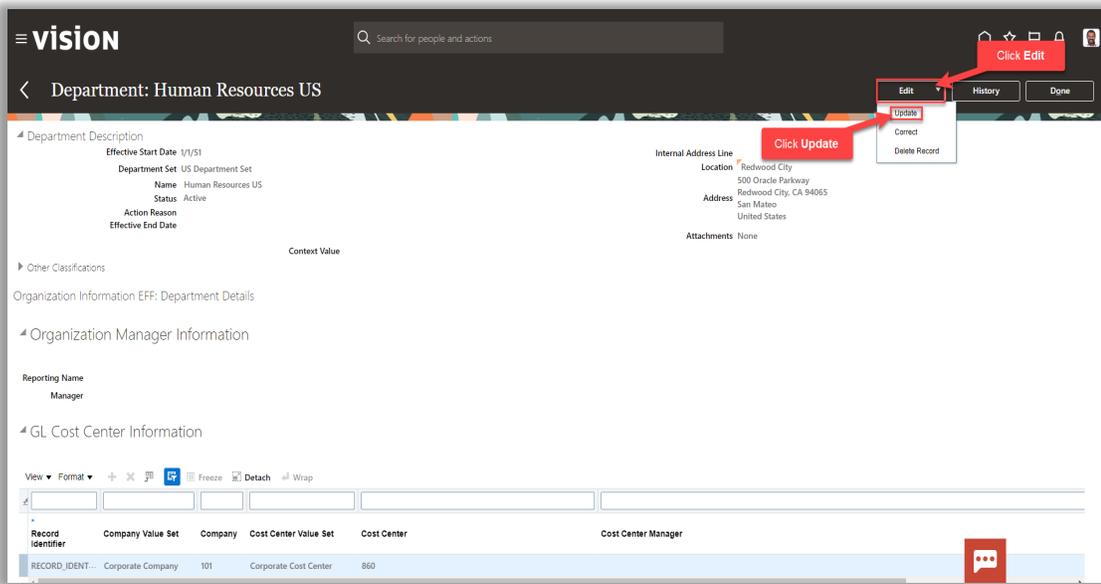
Search for the **Department Name** and click **Search**



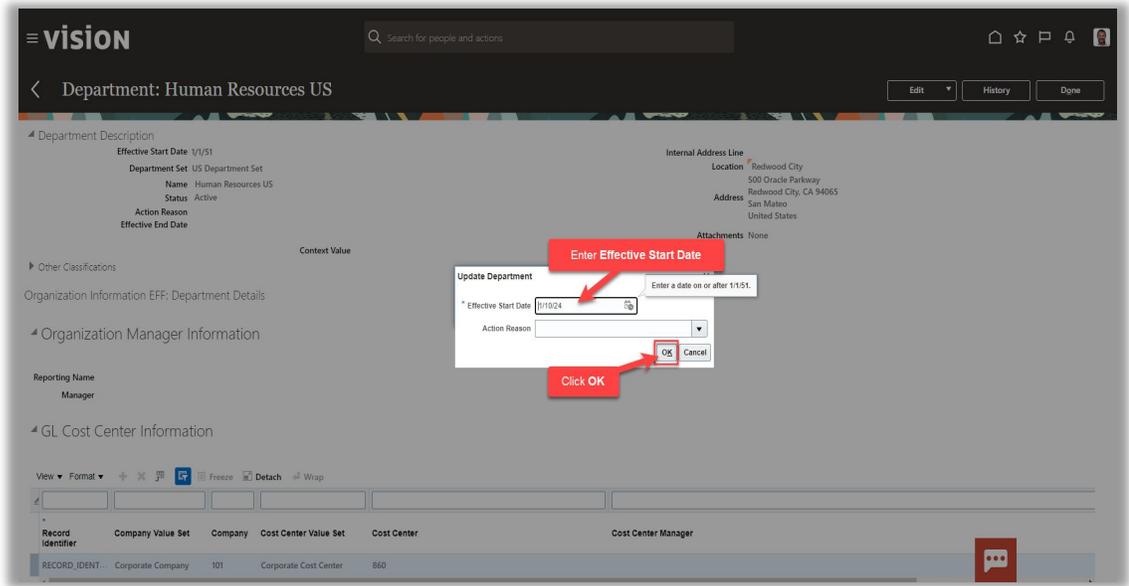
Select the **Department Name**



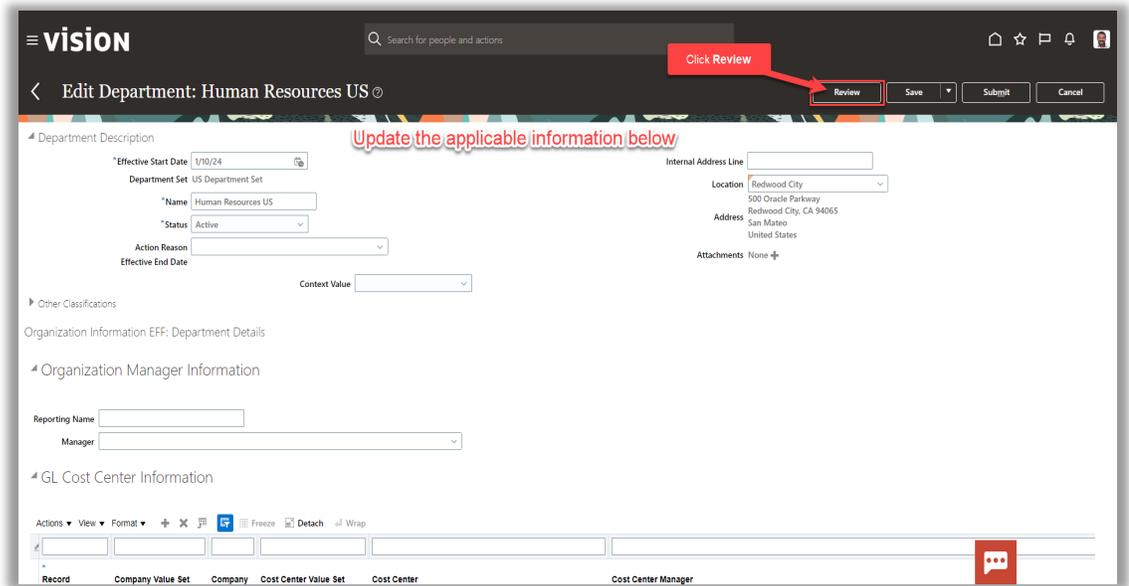
Next, click **Edit** then **Update**. As a note, if we select **update**, we will update the information as of the effective date entered in the next steps. If we select **correct**, we will correct the existing information as of the existing effective date (in this example, as of 1/1/1951)



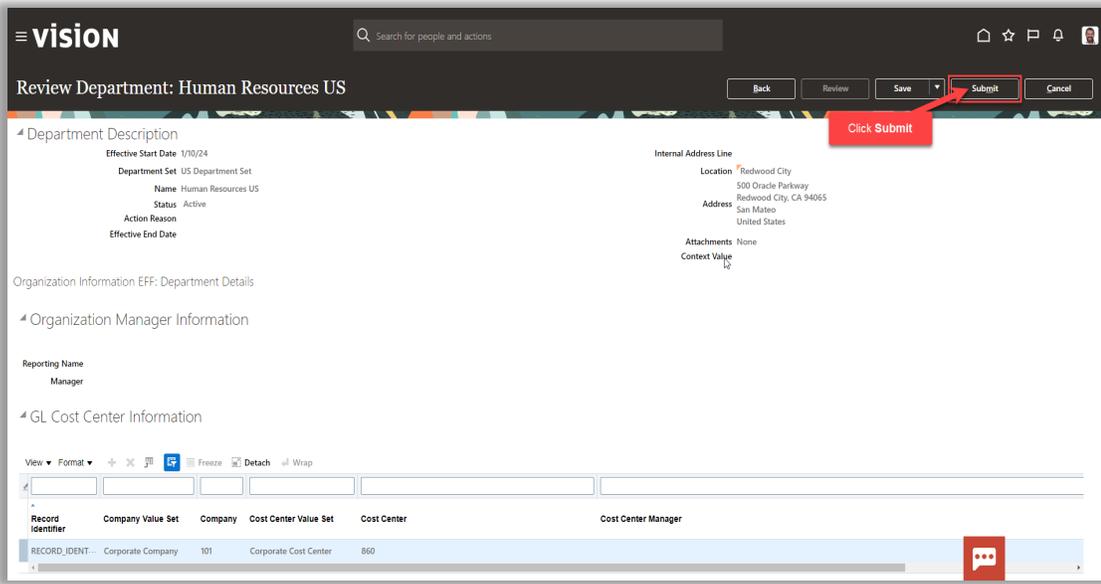
Enter the **Effective Start Date** and the **Action Reason**, if applicable. Next, click **OK**



Lastly, update the applicable information, and click **Review**



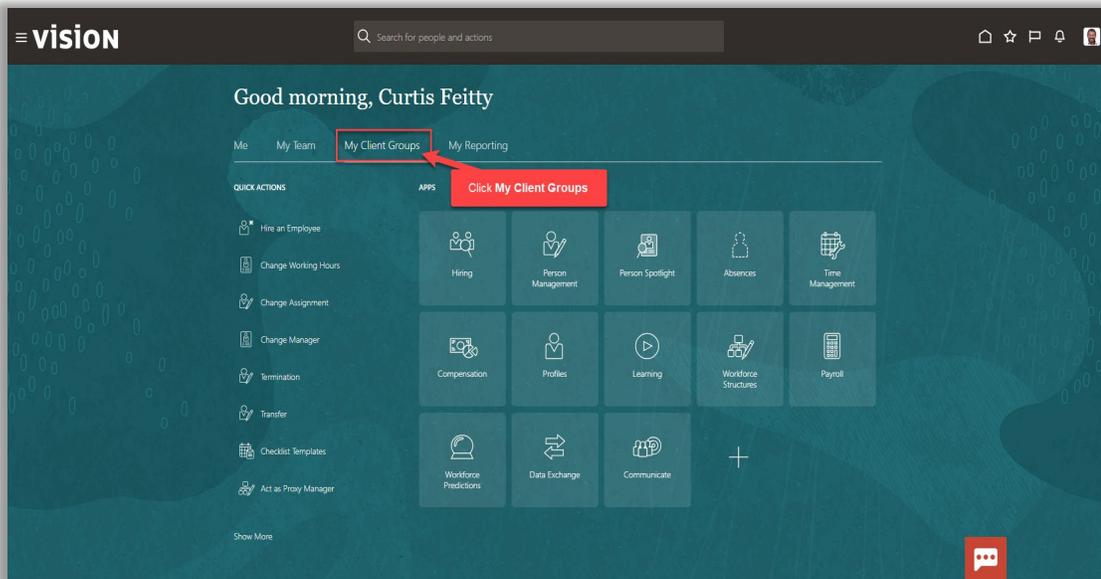
Review the below information. If we need to edit any of the information, click **Back**. Once review is complete, click **Submit**. The department details have been updated as of the **Effective Start Date**



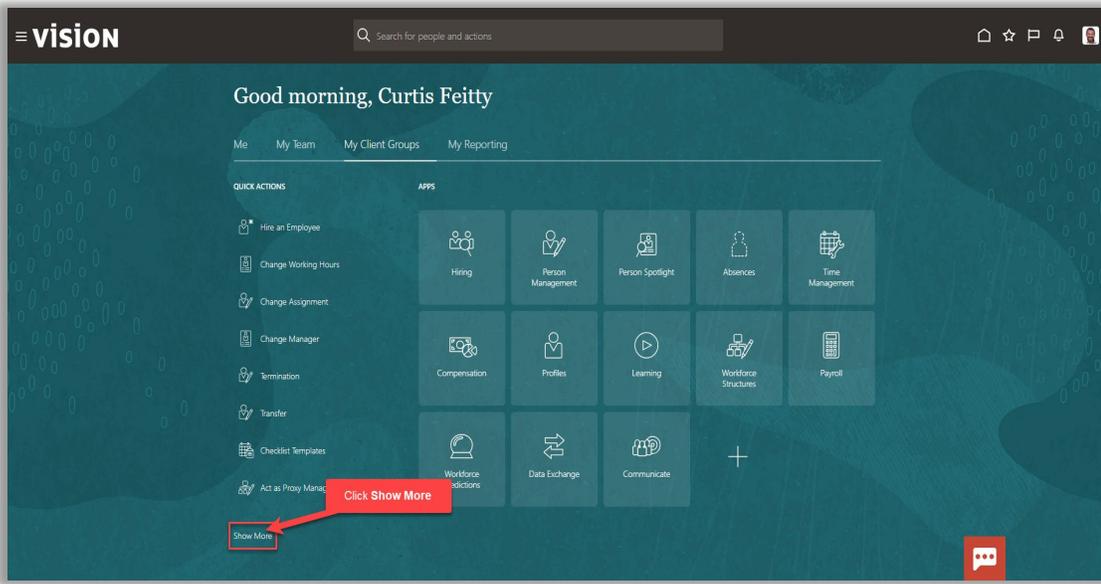
Create A Location

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

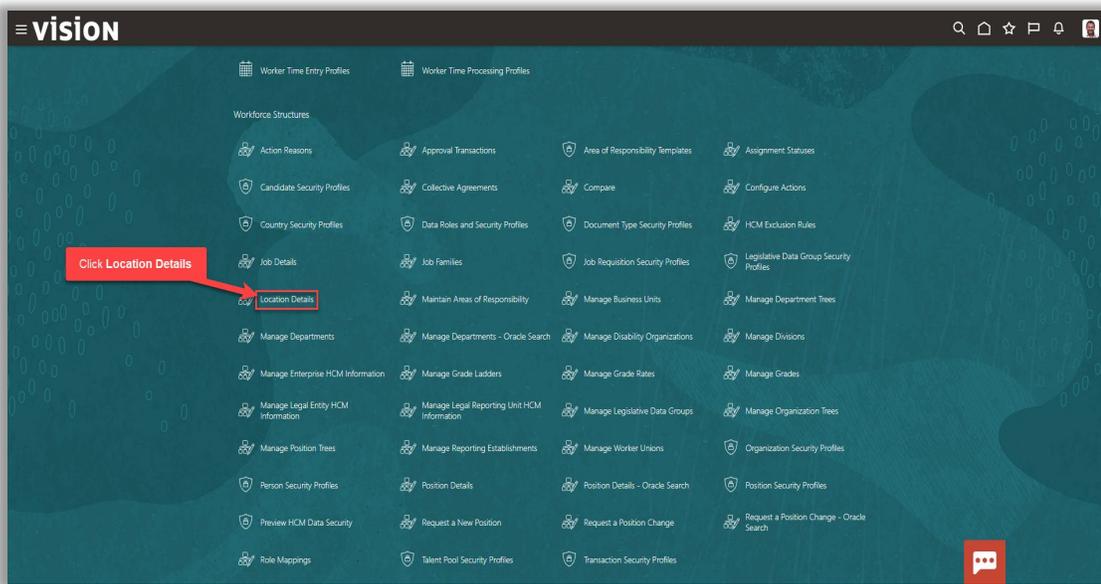
From the home screen, click **My Client Groups**



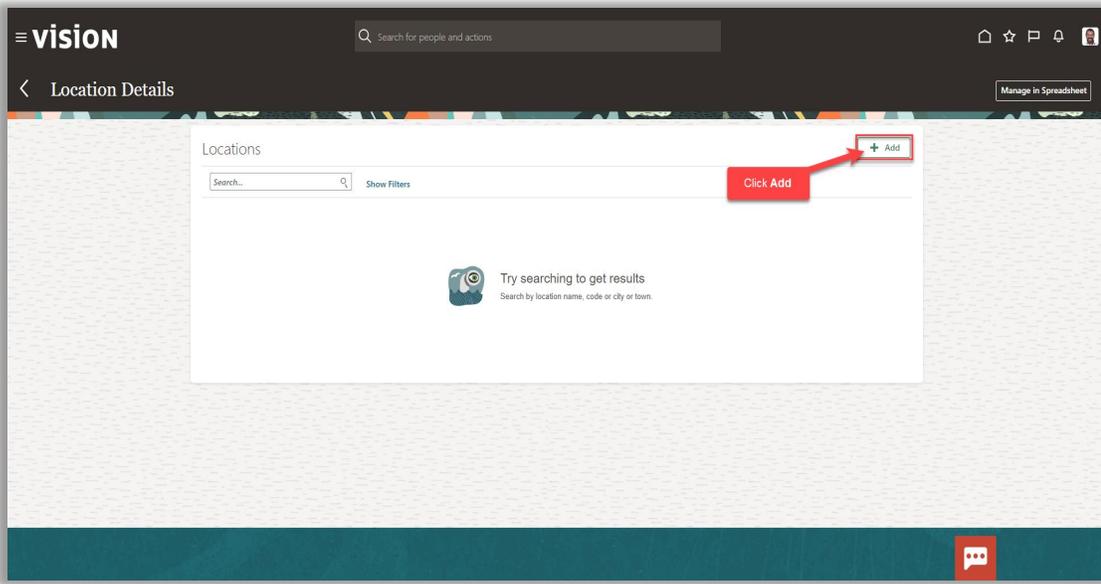
Next, click **Show More**



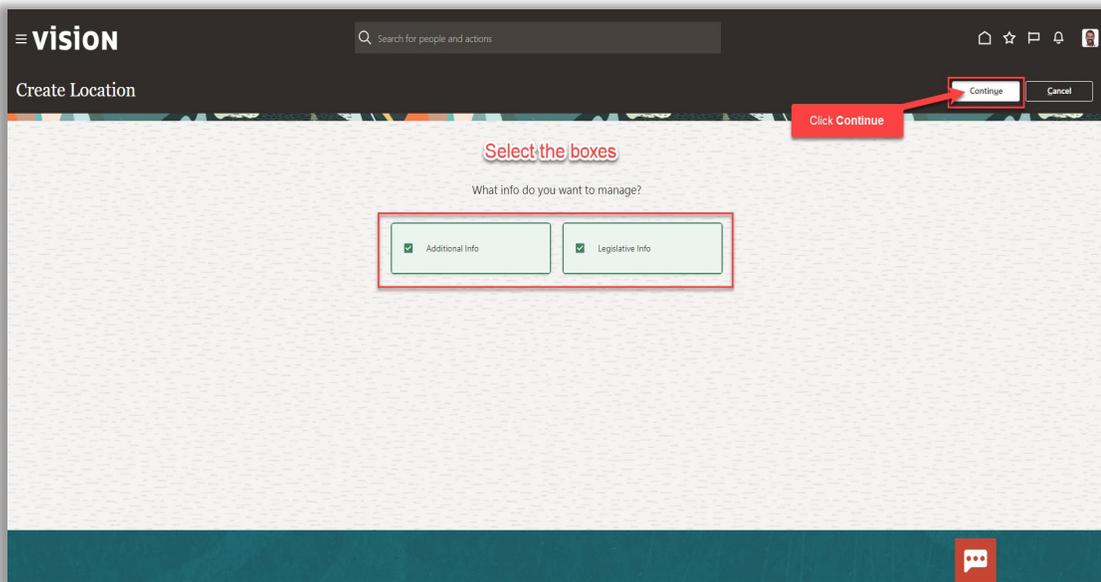
Scroll down and under **Workforce Structures**, click **Location Details**. As a note, we can search **Location Details** by clicking **Ctrl F**



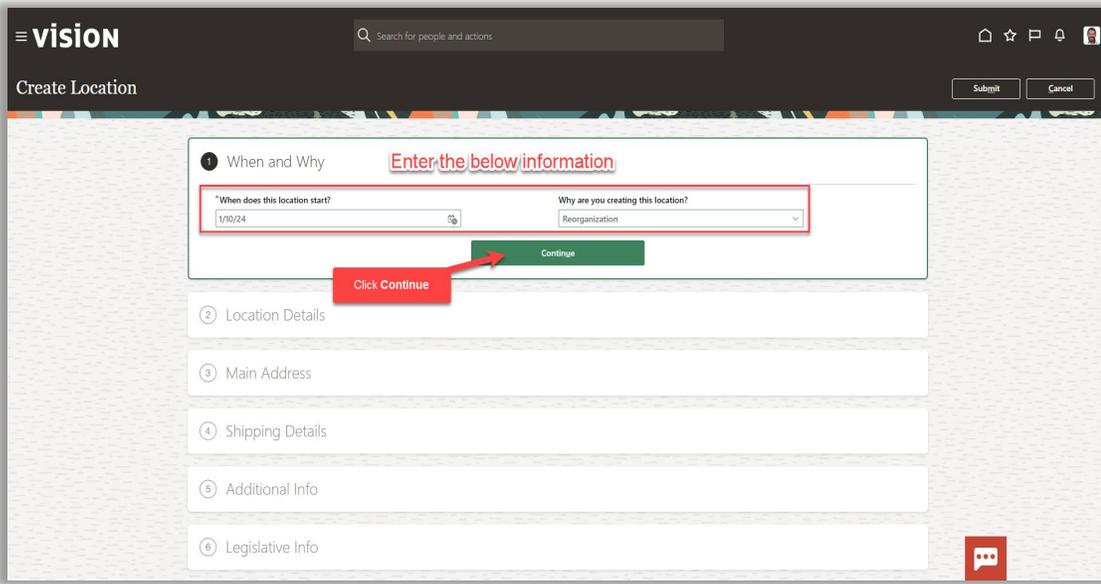
To create a location, click **Add**



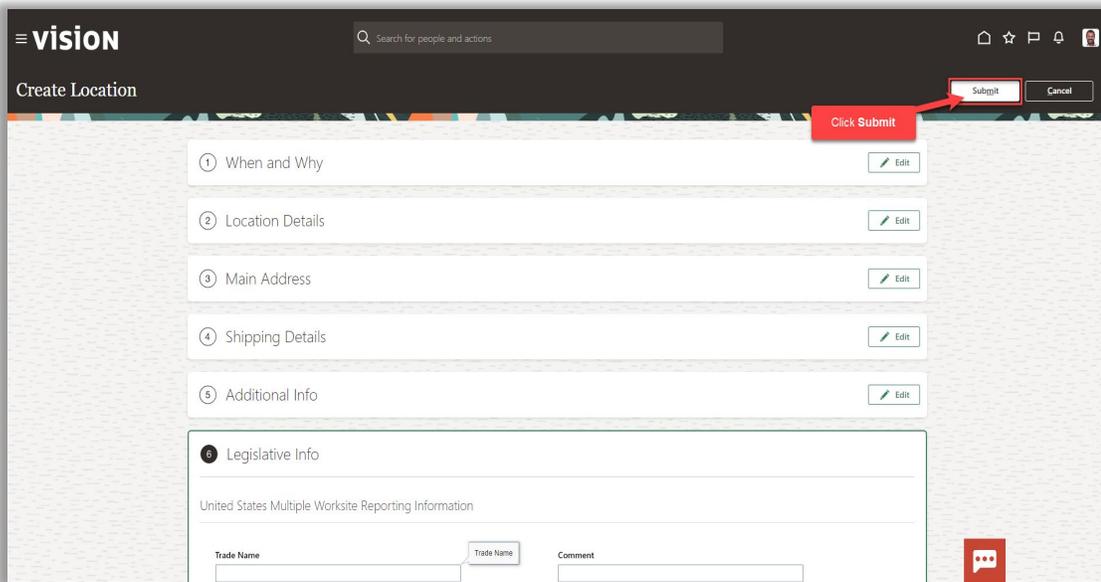
Select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by wer team. Click **Continue**



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



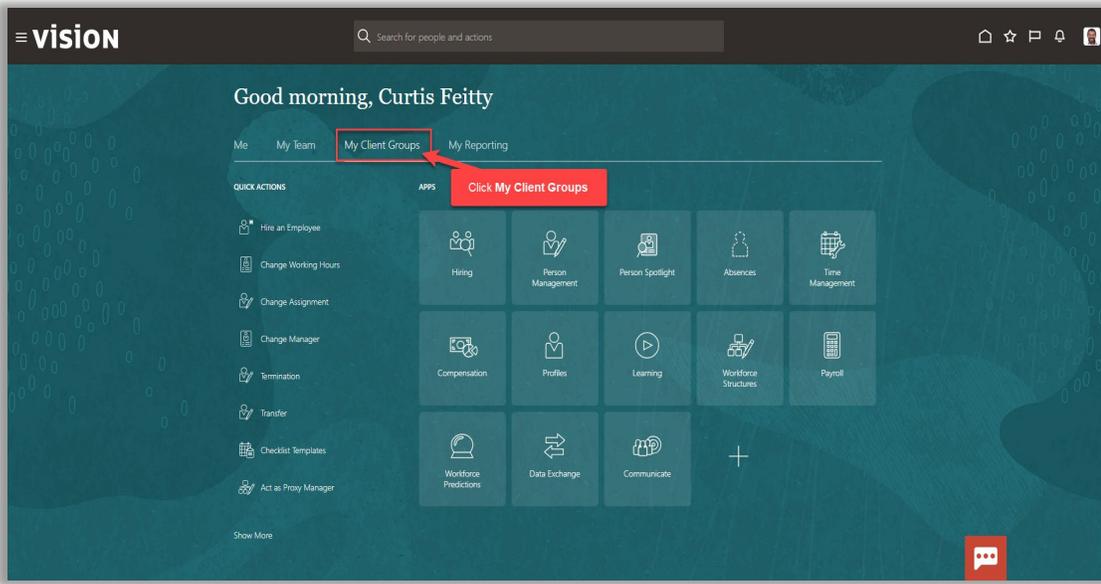
Follow this same process and complete the information in each section. The information needed in each section will depend on wer configurations. We can also edit the information in each section by clicking **Edit**. Once we have added the information in the sections below, click **Submit**. The Location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



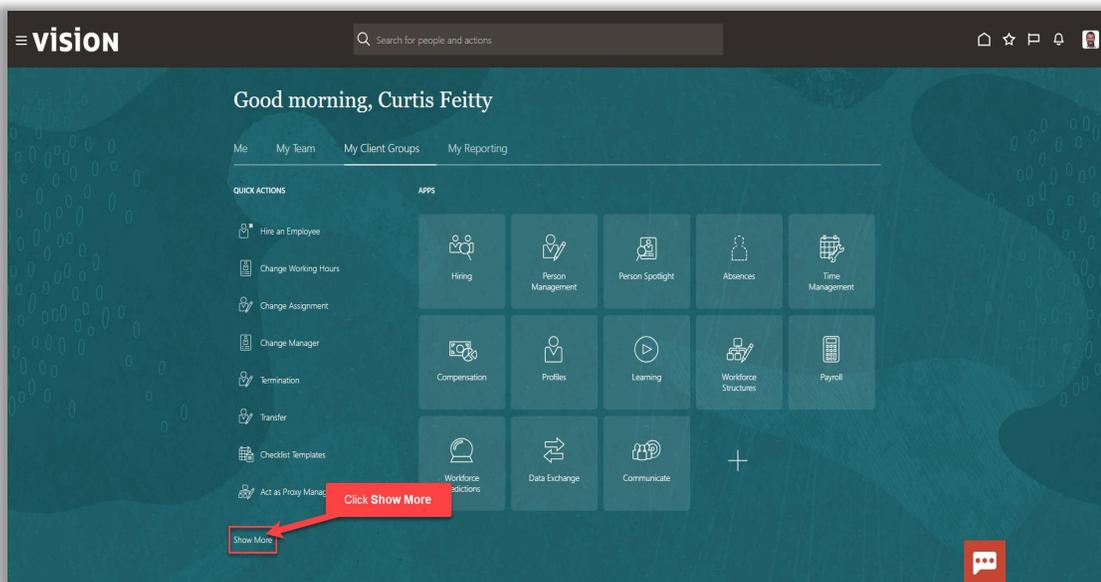
Manage Locations

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

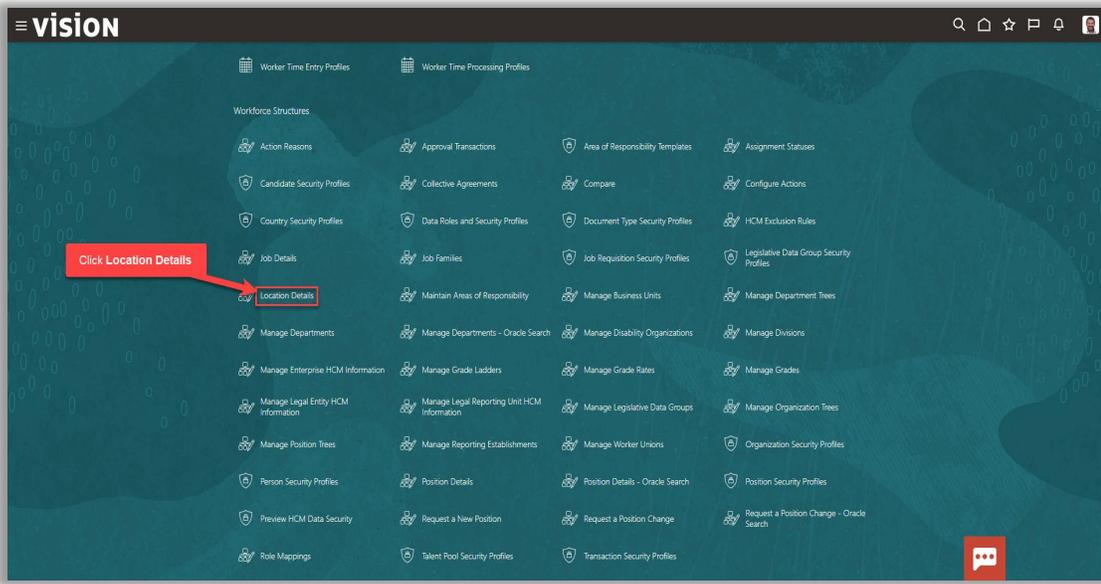
From the home screen, click **My Client Groups**



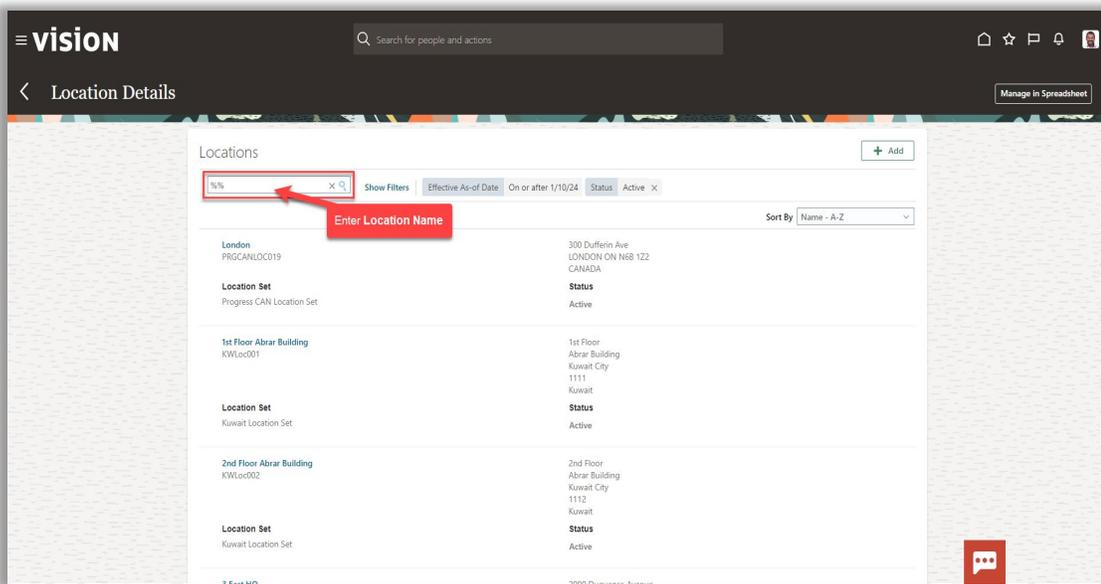
Next, click **Show More**



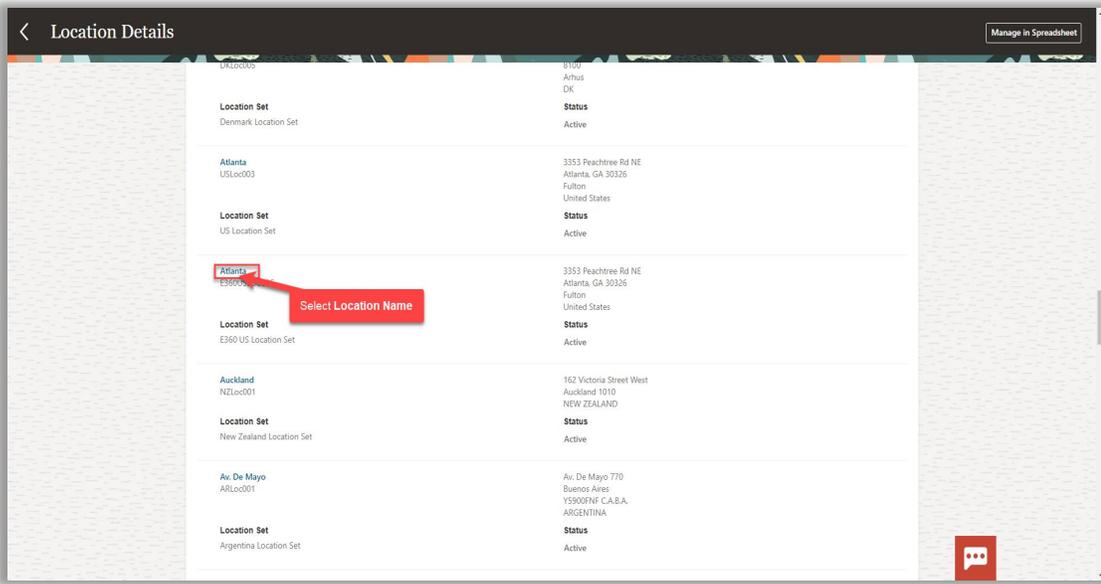
Scroll down and under **Workforce Structures**, click **Location Details**. As a note, we can search **Location Details** by clicking Ctrl F



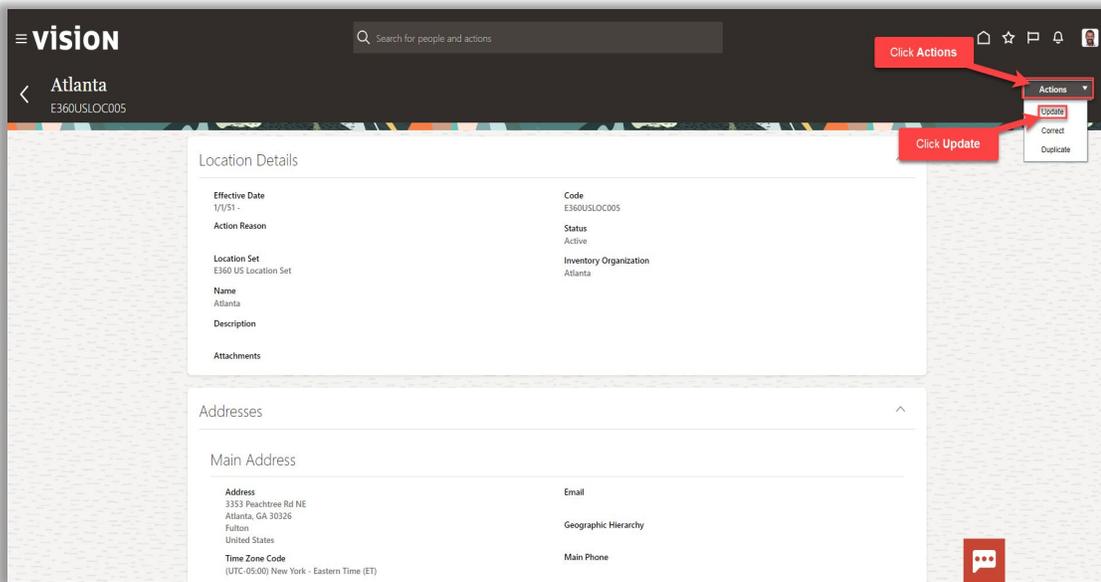
Search for the **Location** by entering the **Location Name**. To populate all locations, enter **%%** and click the **magnifying glass**



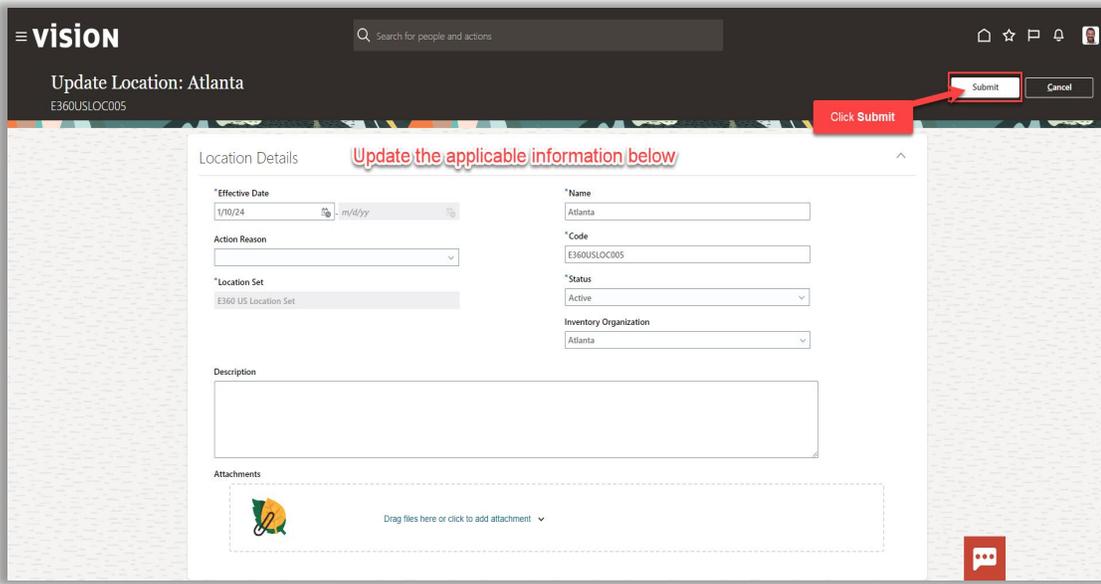
Select the **Location Name**



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)



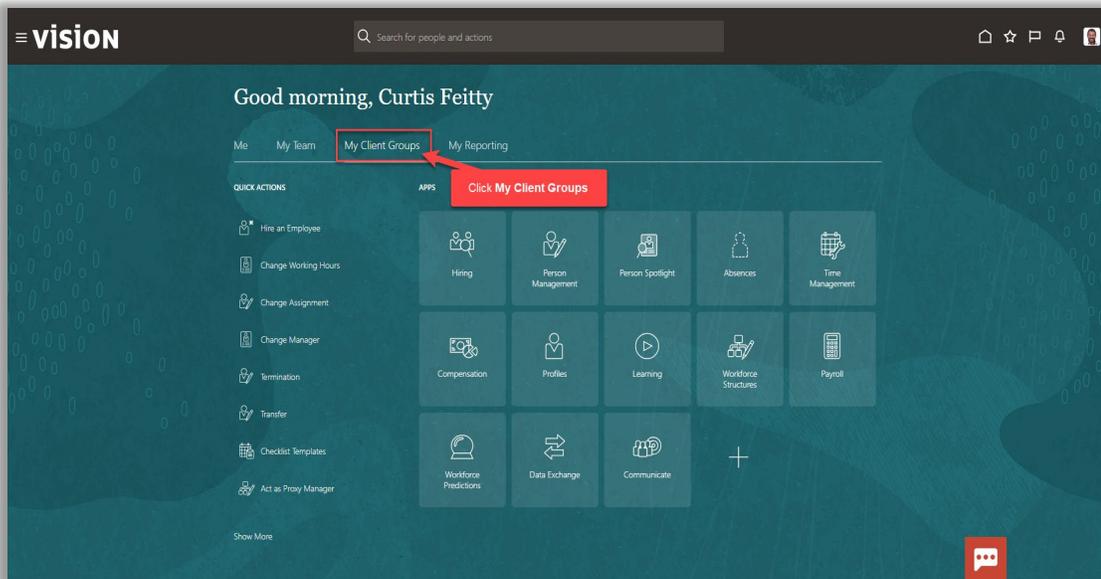
Enter the **Effective Date** then, update the applicable information. Once complete, click **Submit**. The Location Details have been updated as of the **Effective Start Date**.



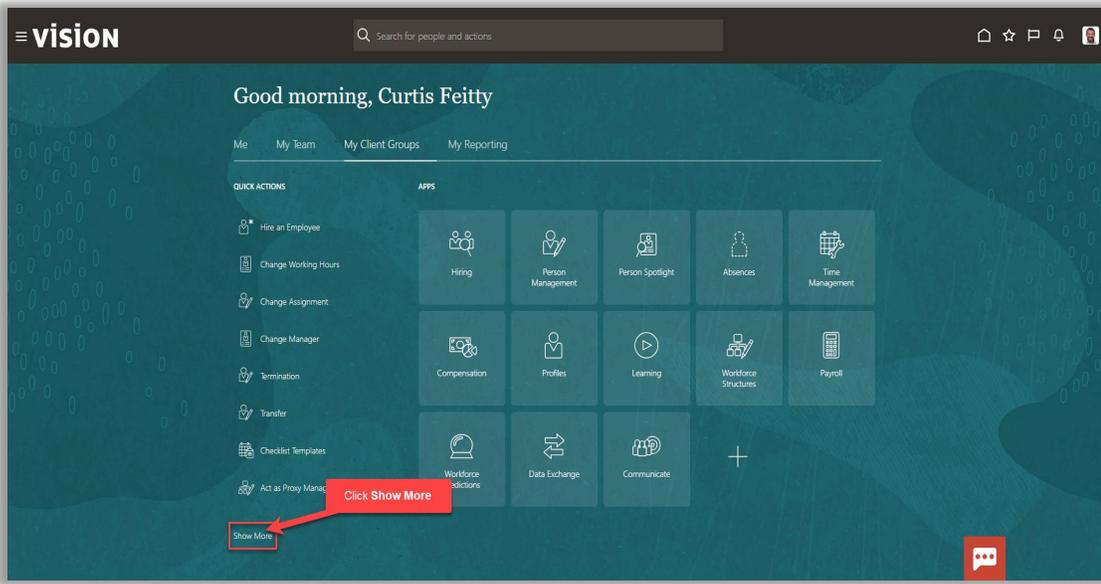
Create A Job

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

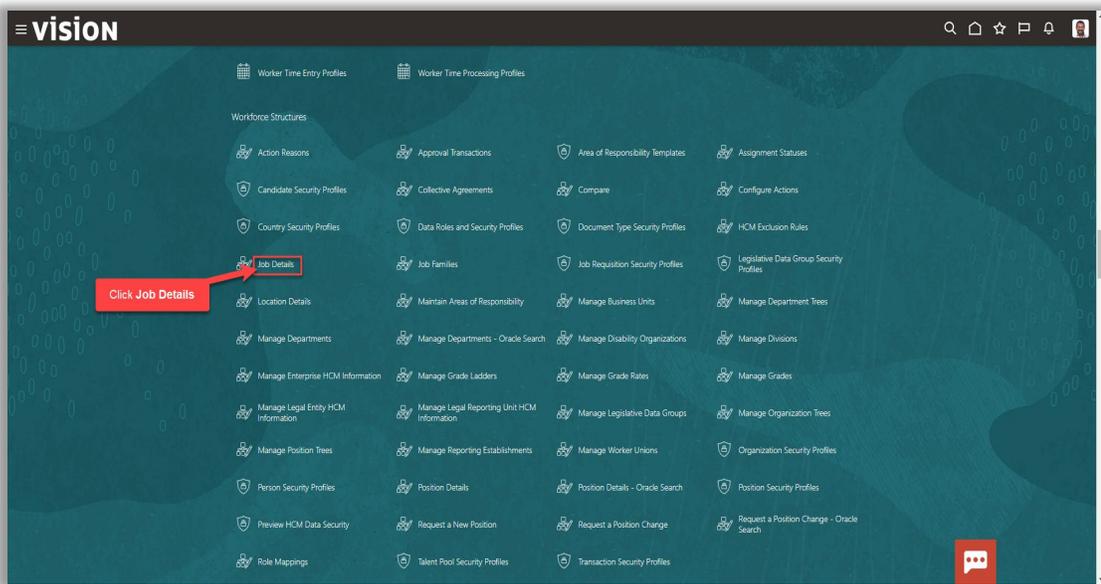
From the home screen, click **My Client Groups**



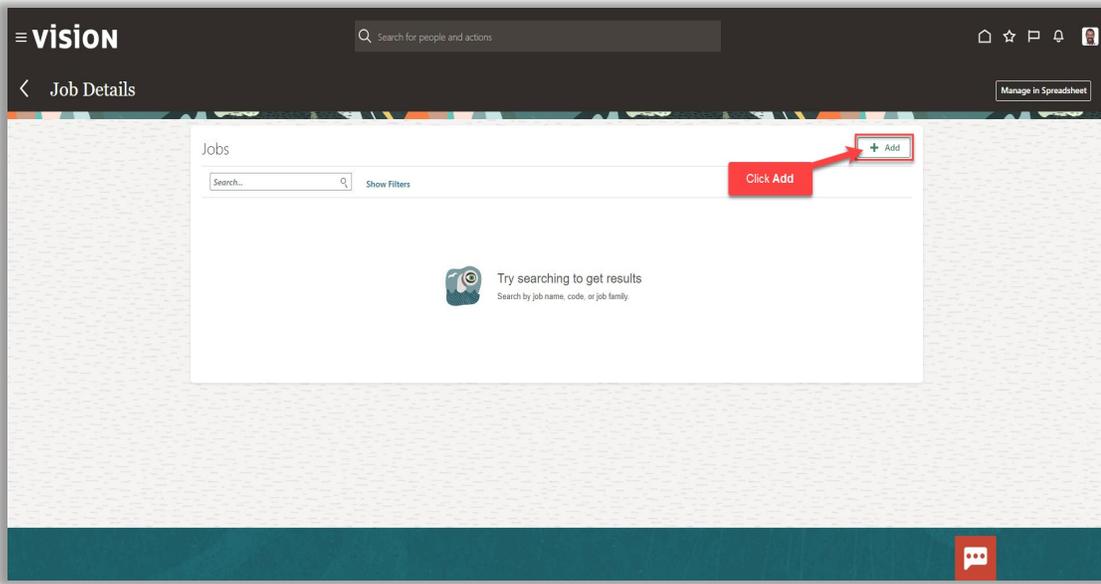
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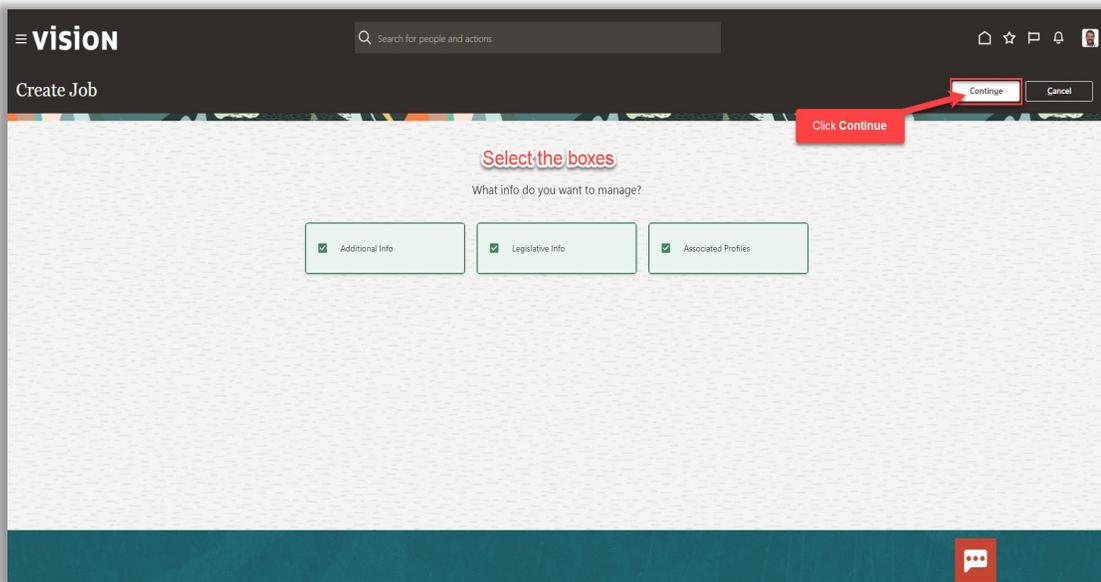
Scroll down and under **Workforce Structures**, click **Job Details**. As a note, we can search **Job Details** by clicking Ctrl F



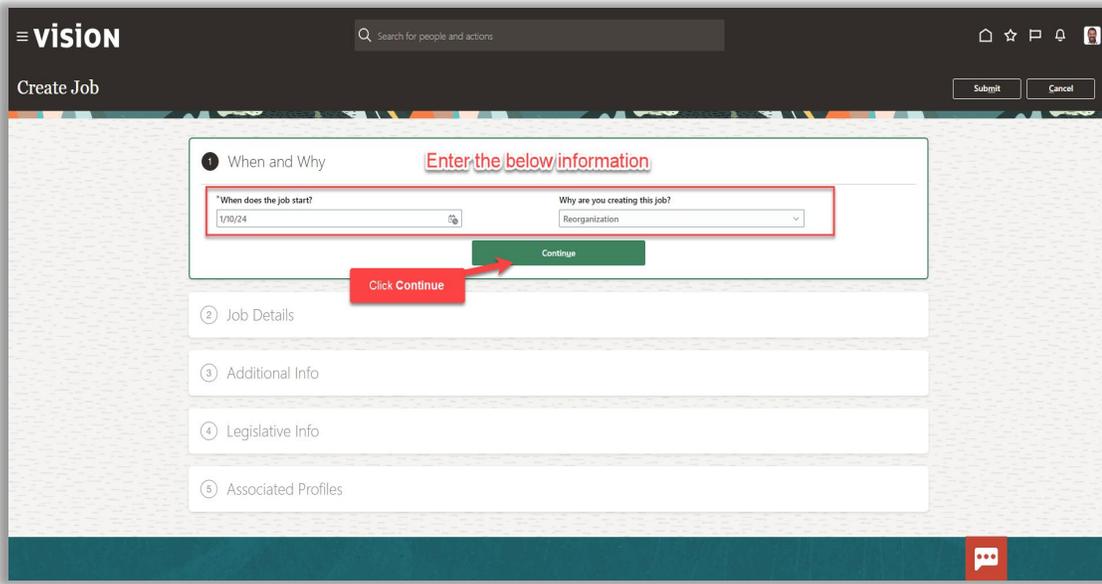
Click **Add** to create a new Job



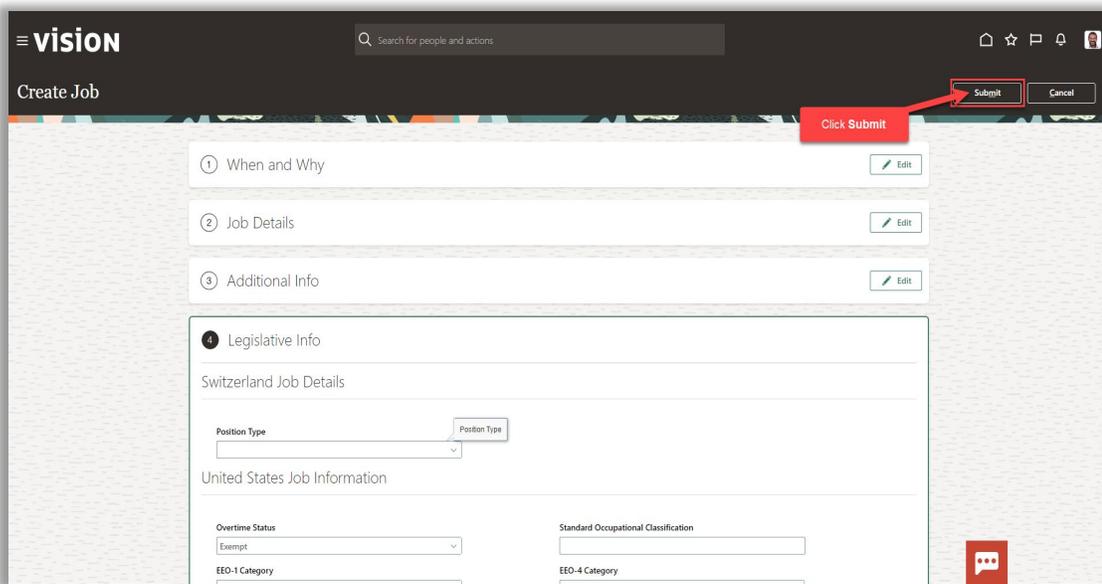
Select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**



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



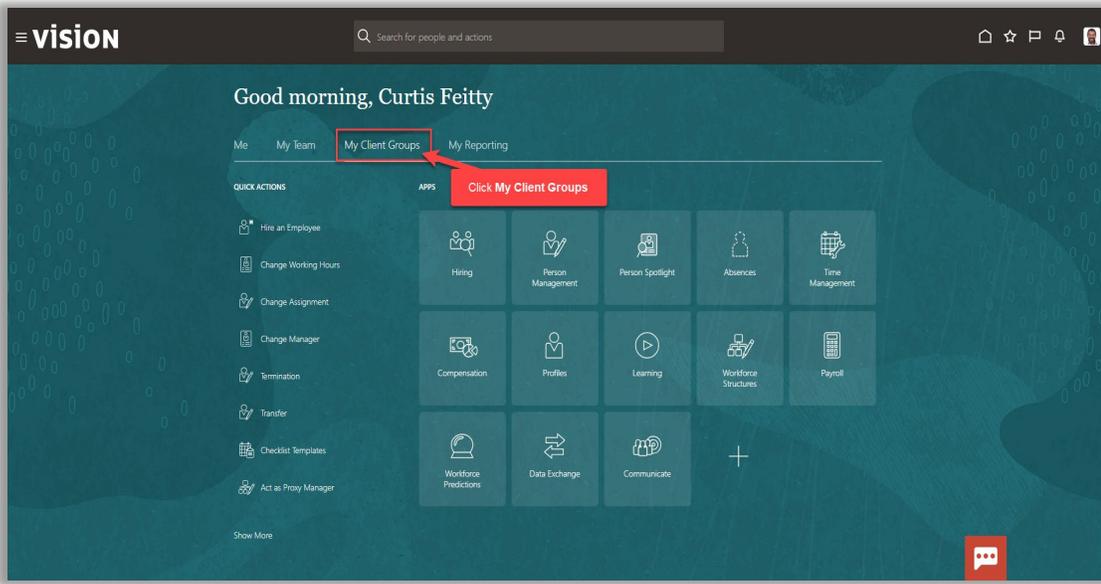
Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. We can also edit the information in each section by clicking **Edit**. Once we have added the information in the sections below, click **Submit**. The Job has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



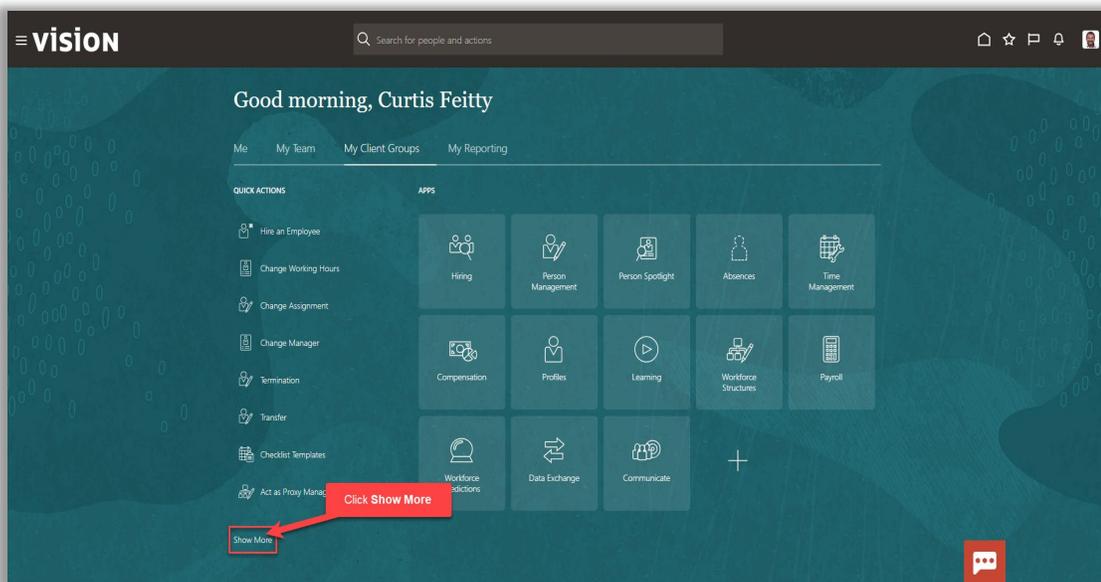
Manage Jobs

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

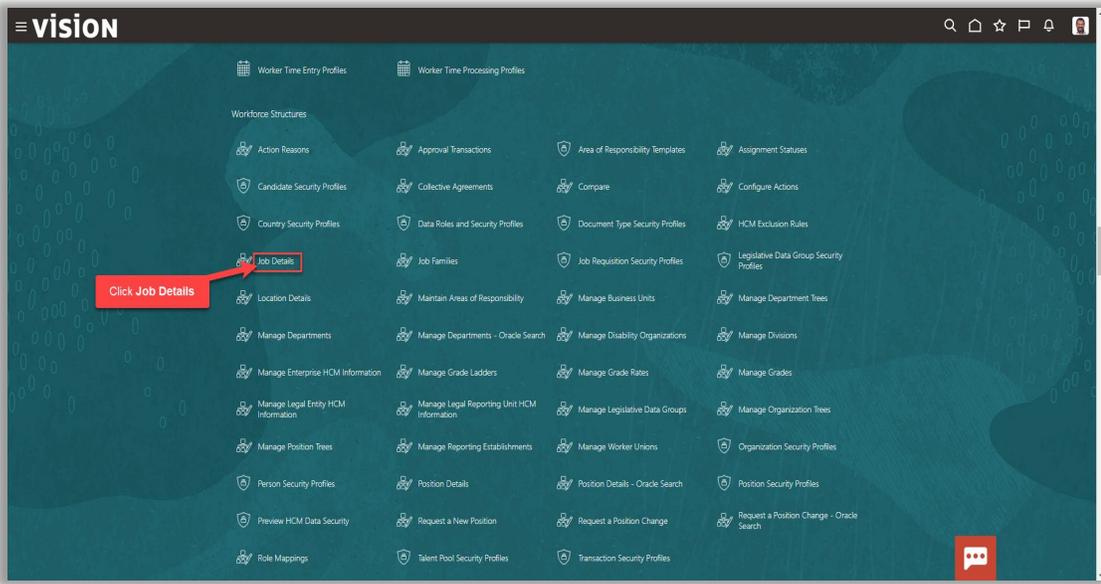
From the home screen, click **My Client Groups**



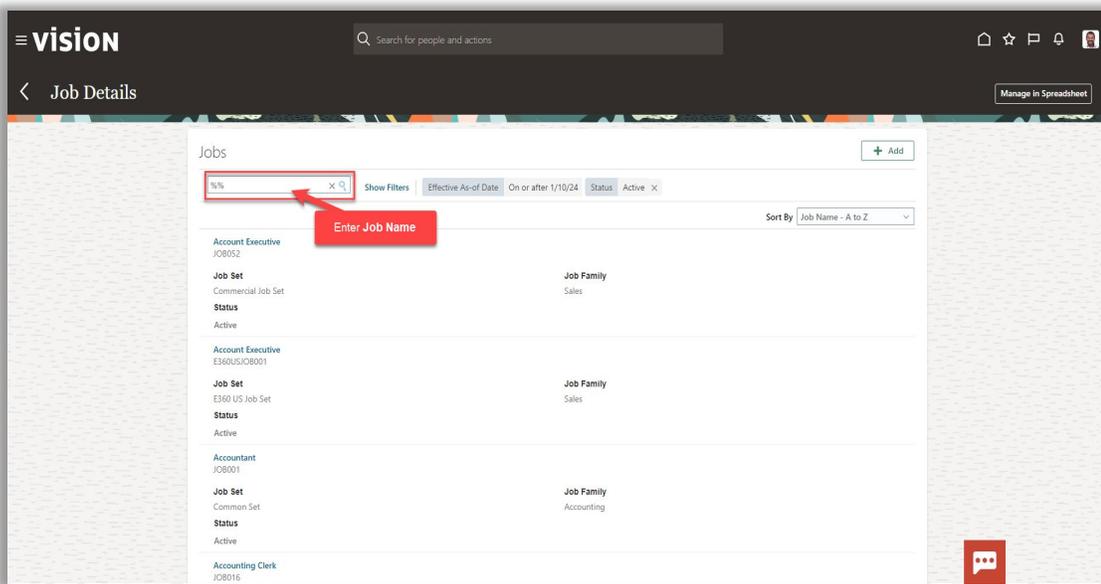
Next, click **Show More**



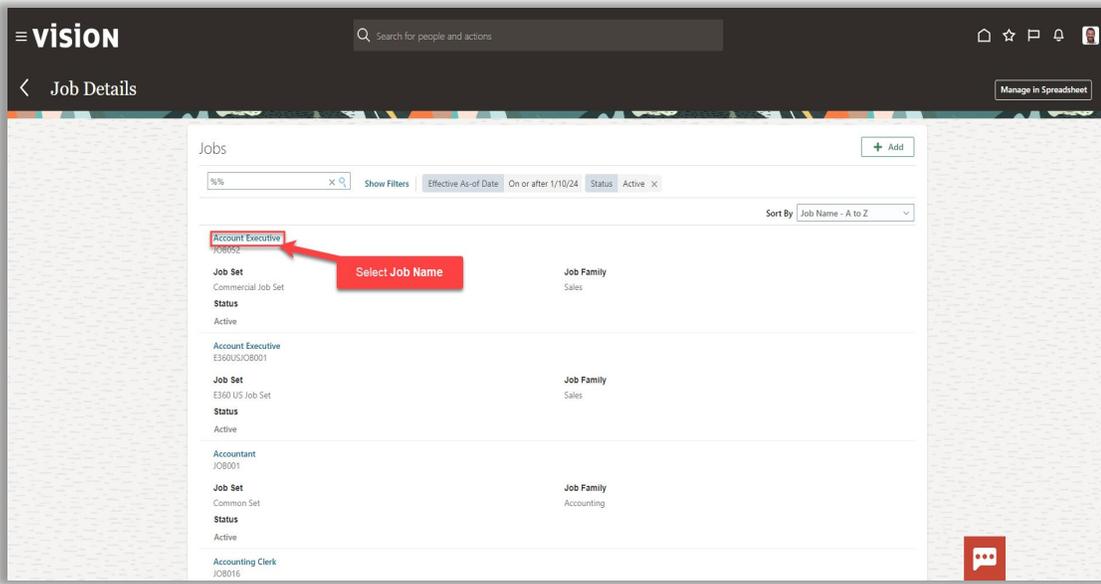
Scroll down and under **Workforce Structures**, click **Job Details**. As a note, we can search **Job Details** by clicking Ctrl F



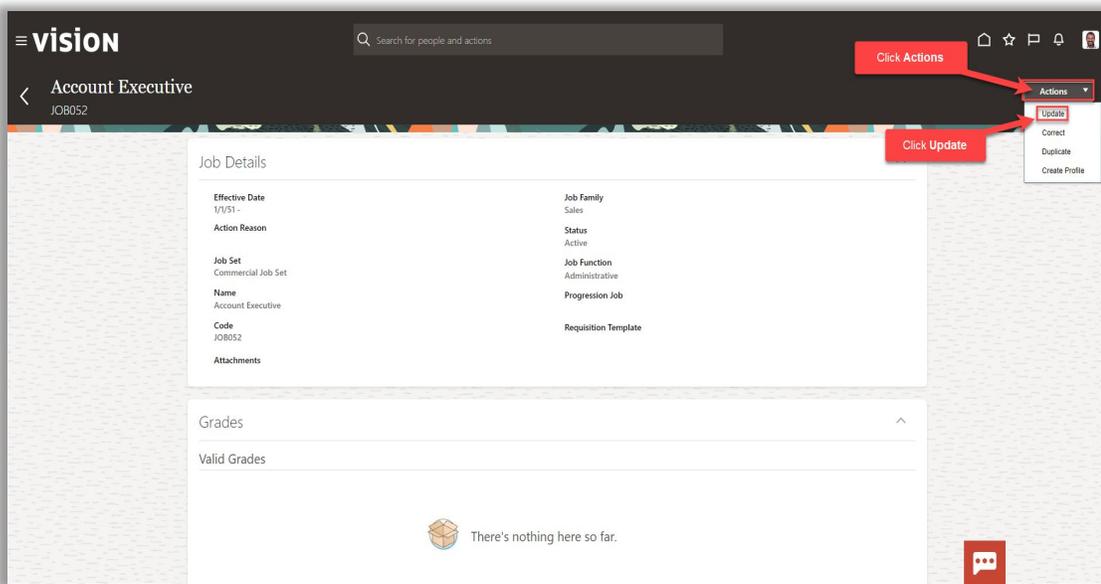
Search for the **Job** by entering the **Job Name**. To populate all jobs, enter **%%** and click the **magnifying glass**



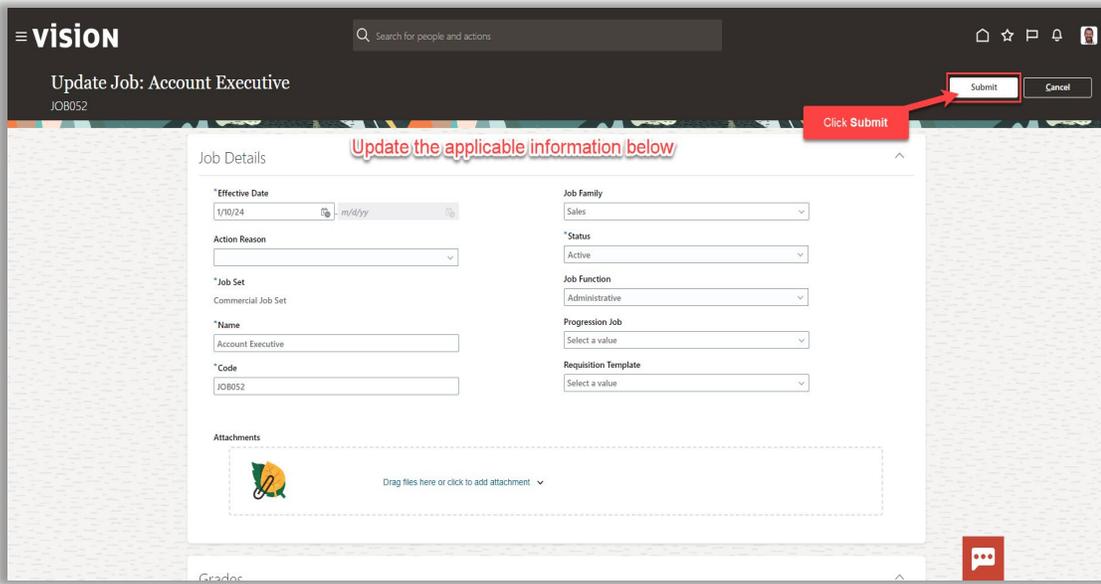
Select the **Job Name**



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)



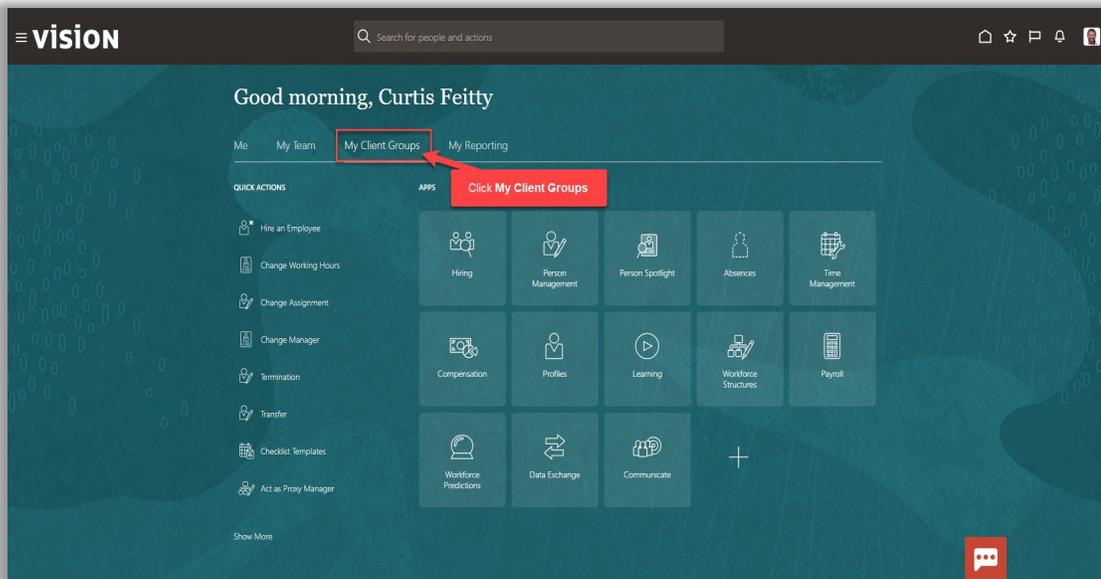
Enter the **Effective Date** then, update the applicable information. Once complete, click **Submit**. The Job Details have been updated as of the **Effective Start Date**



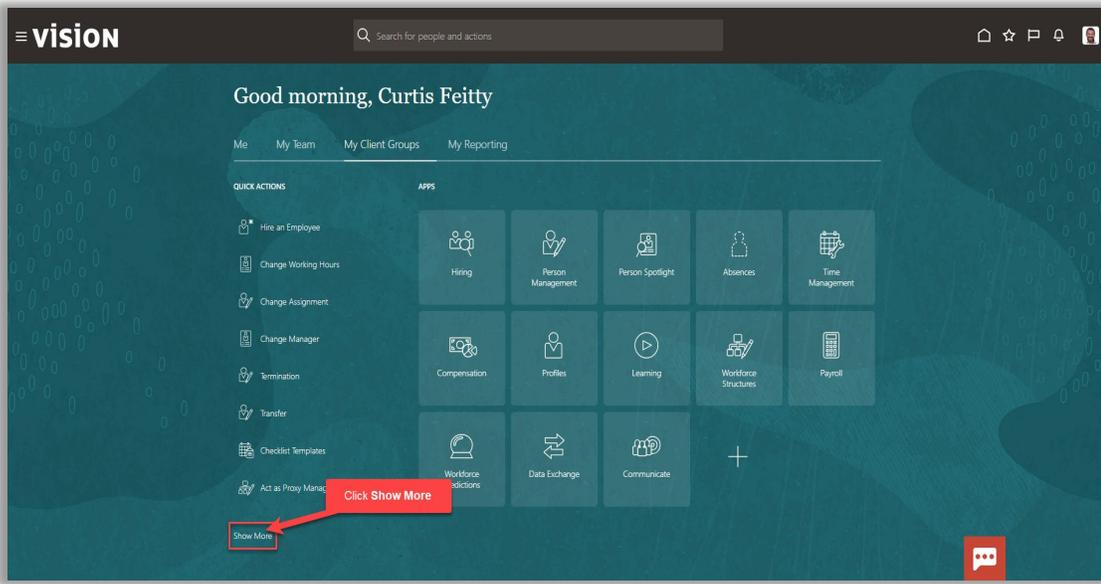
Create A Grade

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

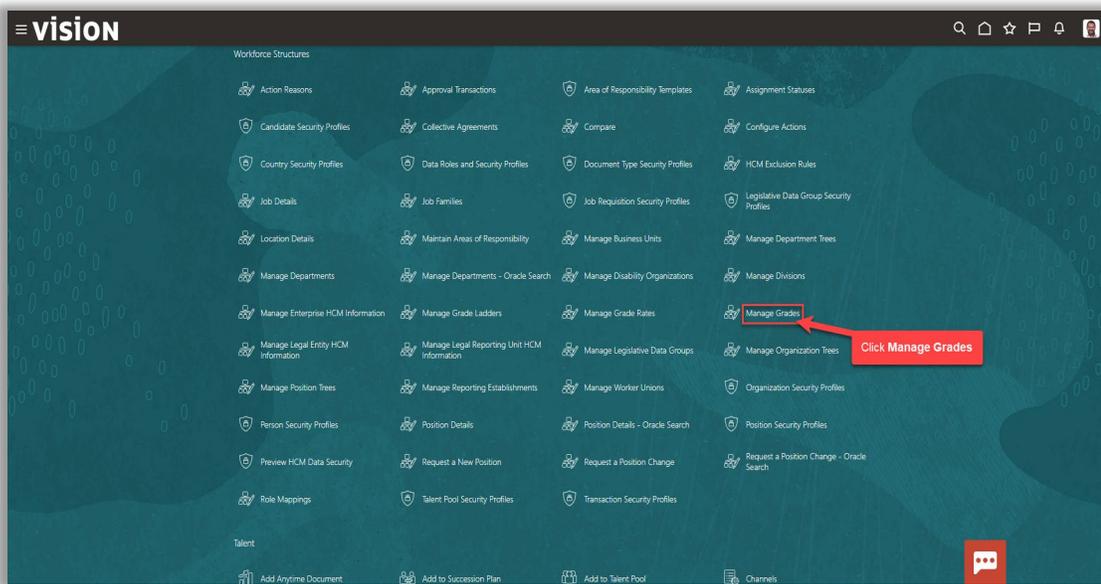
From the home screen, click **My Client Groups**



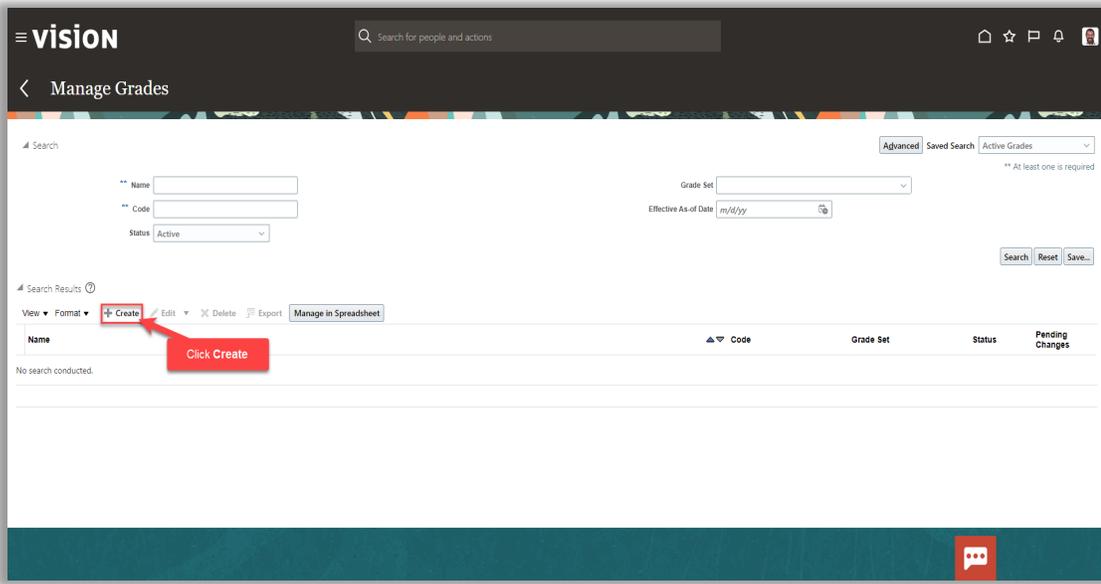
Next, click **Show More**



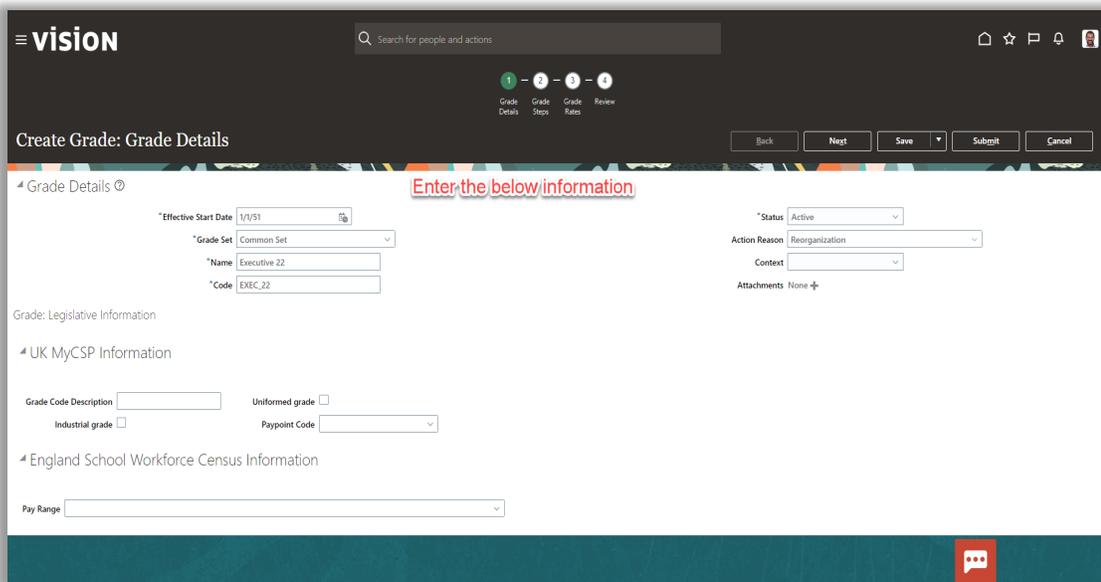
Scroll down and under **Workforce Structures**, click **Manage Grades**. As a note, we can search **Manage Grades** by clicking Ctrl F



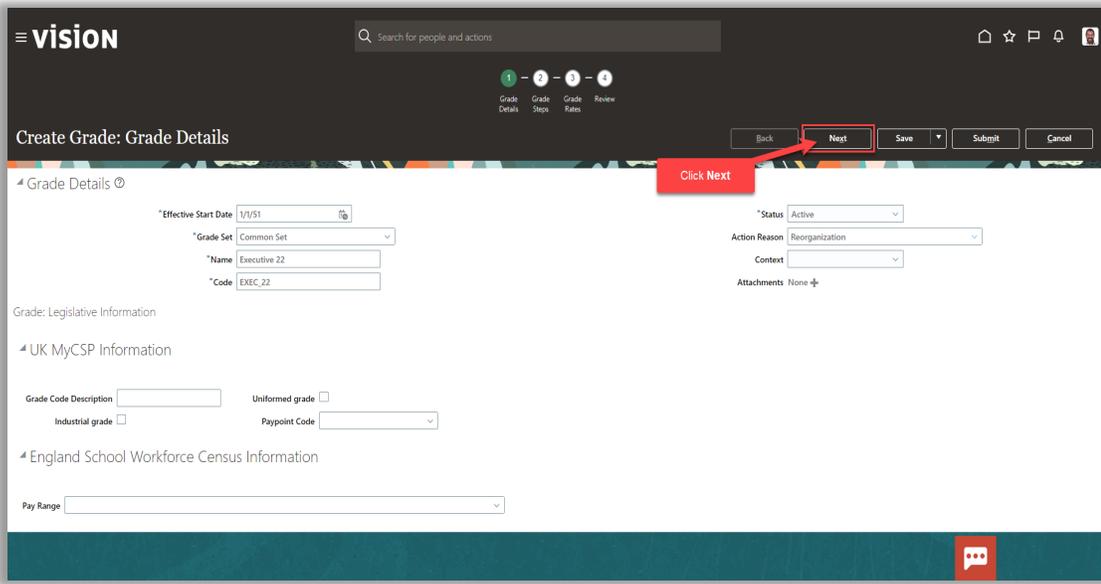
To create a Grade, click **Create**



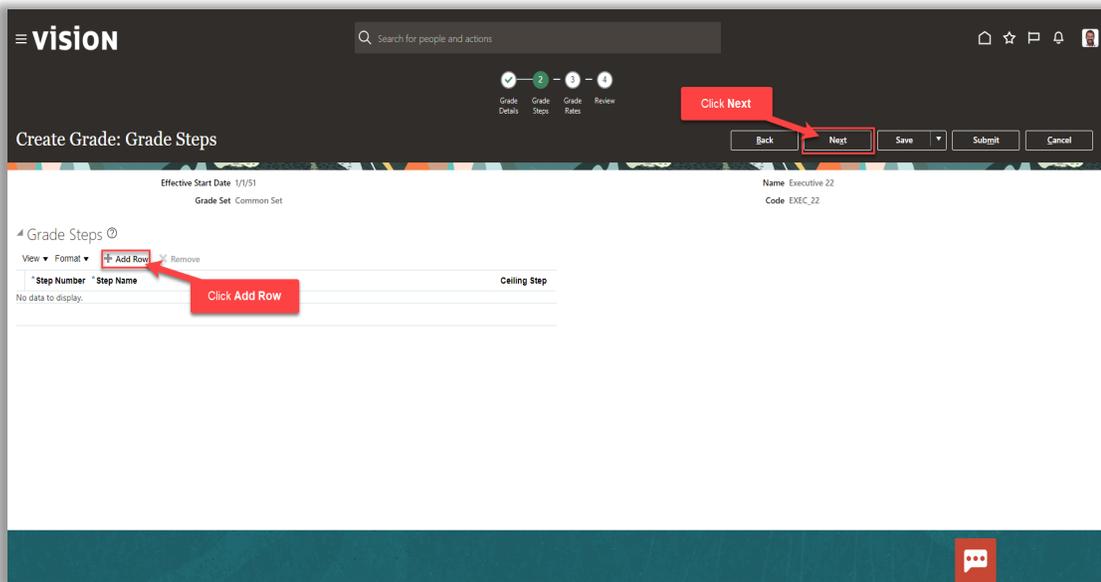
Next, enter the **Effective State Date, Grade Set, Name, Code and Status**. The effective start date will default to the Oracle recommended start date; it is recommended to use this date. The grade set will default; select the grade set based on our configurations; common set is the most commonly used.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



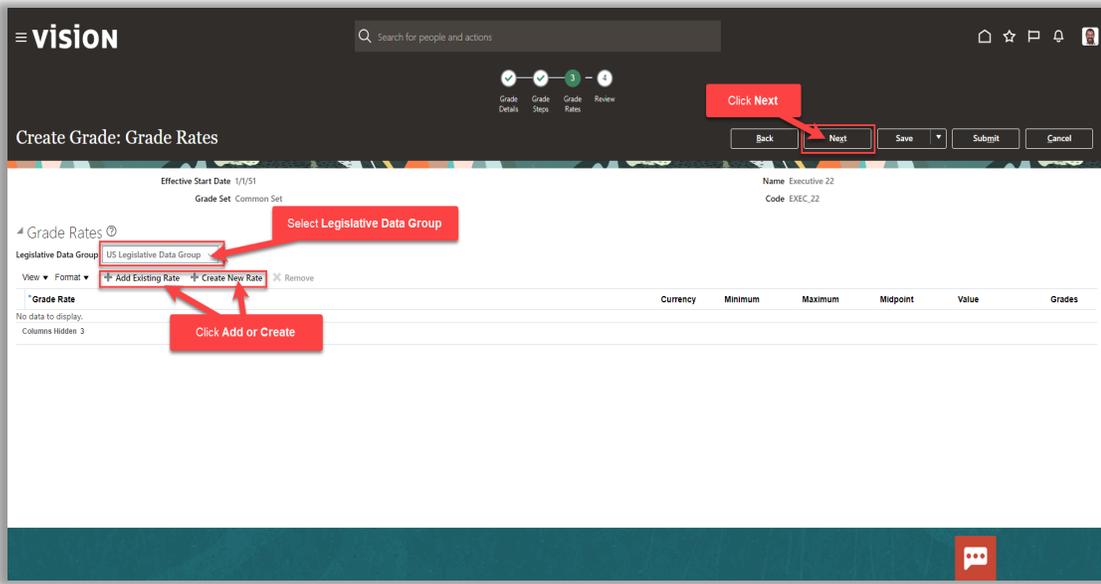
Once the information has been entered, click **Next**



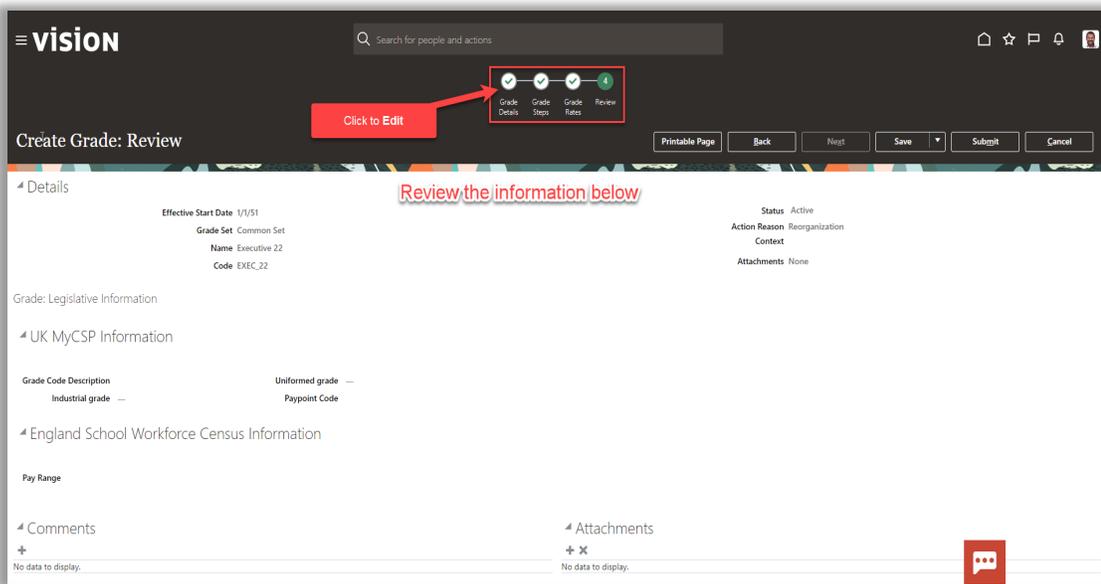
Next, enter the **Grade Steps**. The information needed on this screen will depend on our setups. If we have steps associated with grades, we can add those here by selecting **Add Row**, if applicable. If we do not use grade steps, please click **Next**



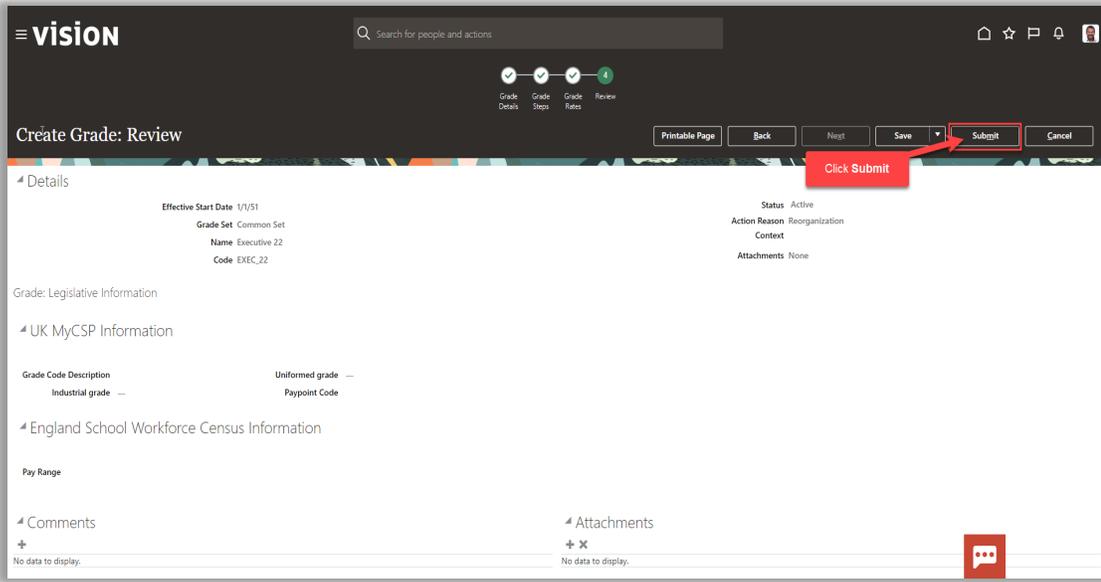
First, ensure the correct **Legislative Data Group** is displayed; if not, use the drop down to select the correct Legislative Data Group. Next, enter the **Grade Rates**. The information needed on this screen will depend on our setups. If we have rates created and we'd like to associate those rates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



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



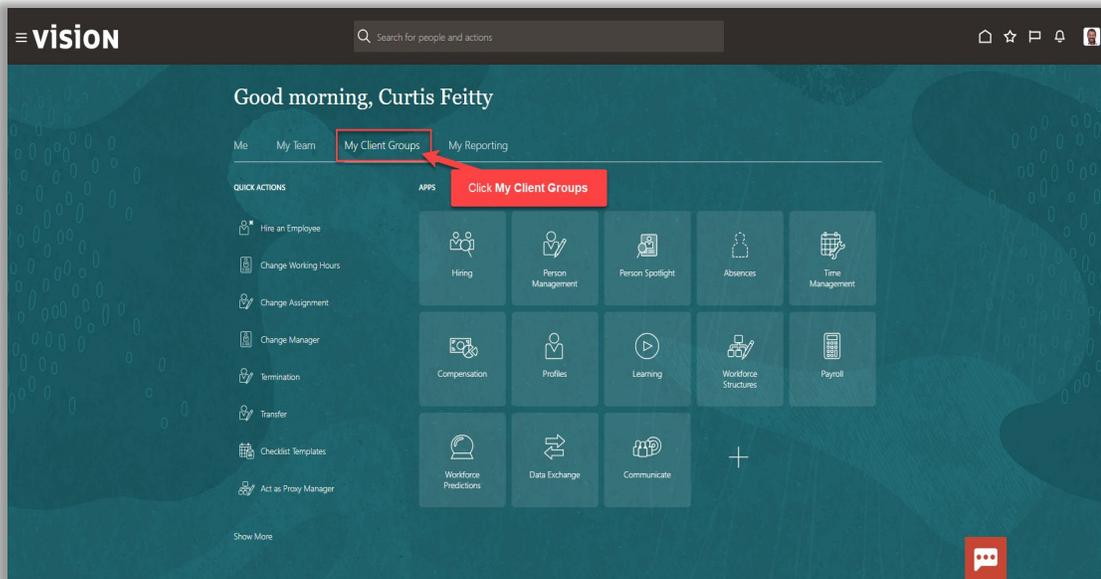
Once our review is complete, click **Submit**. The Grade has been created.



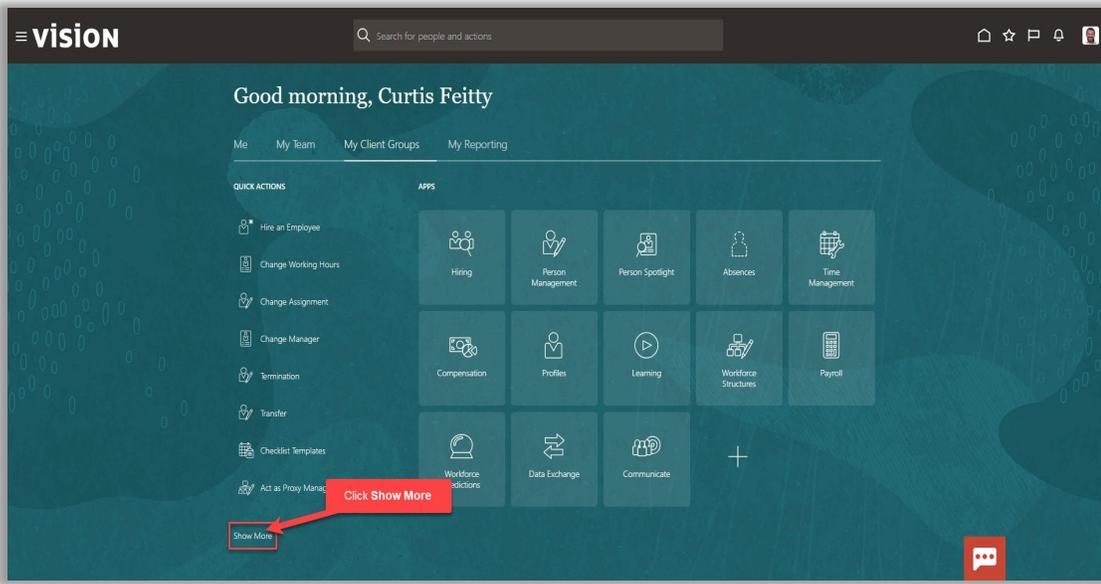
Manage Grades

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

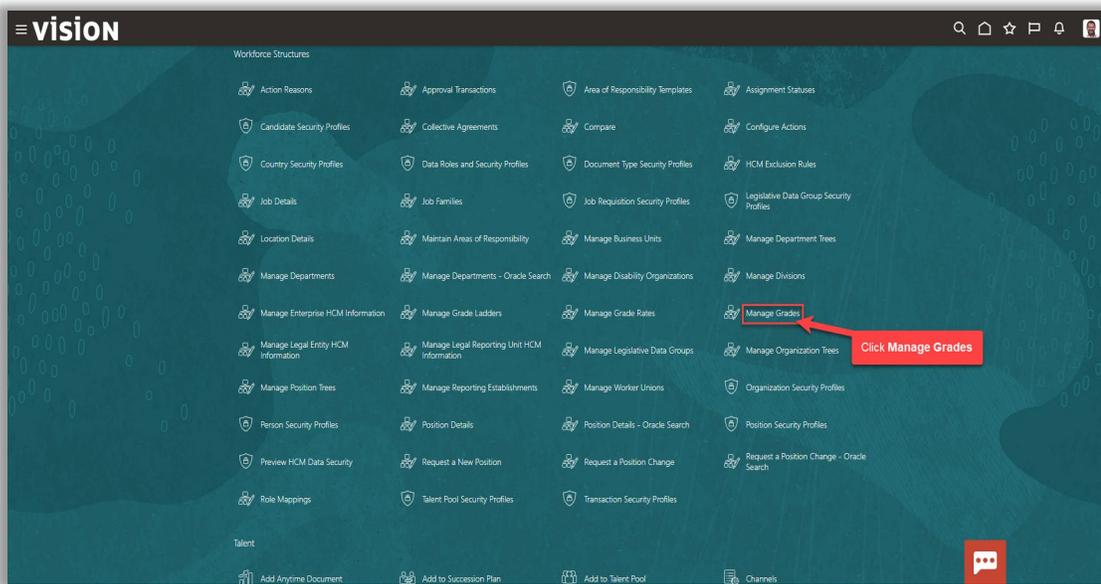
From the home screen, click **My Client Groups**



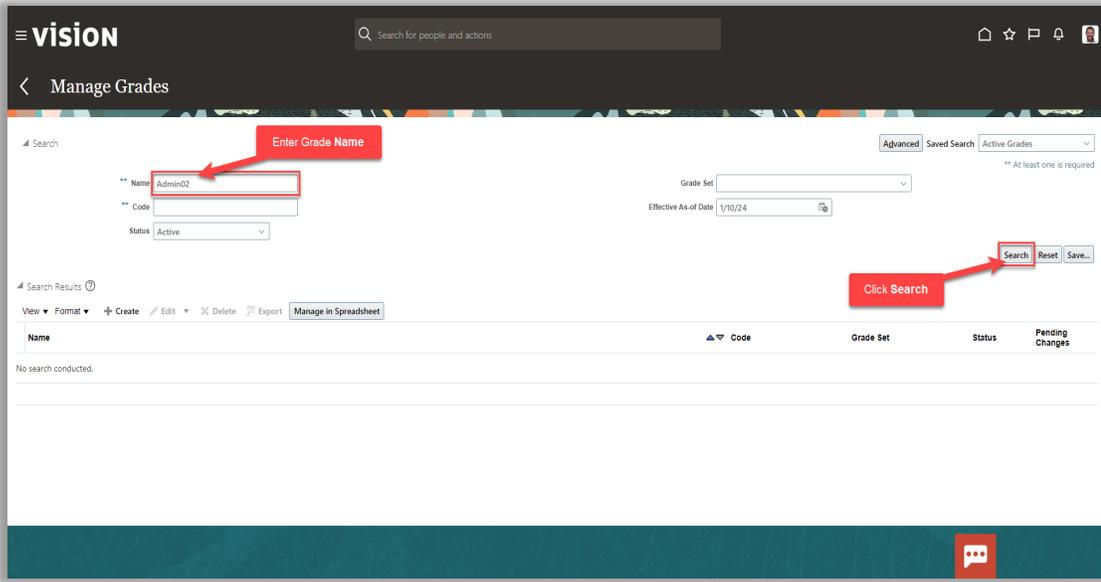
Next, click **Show More**



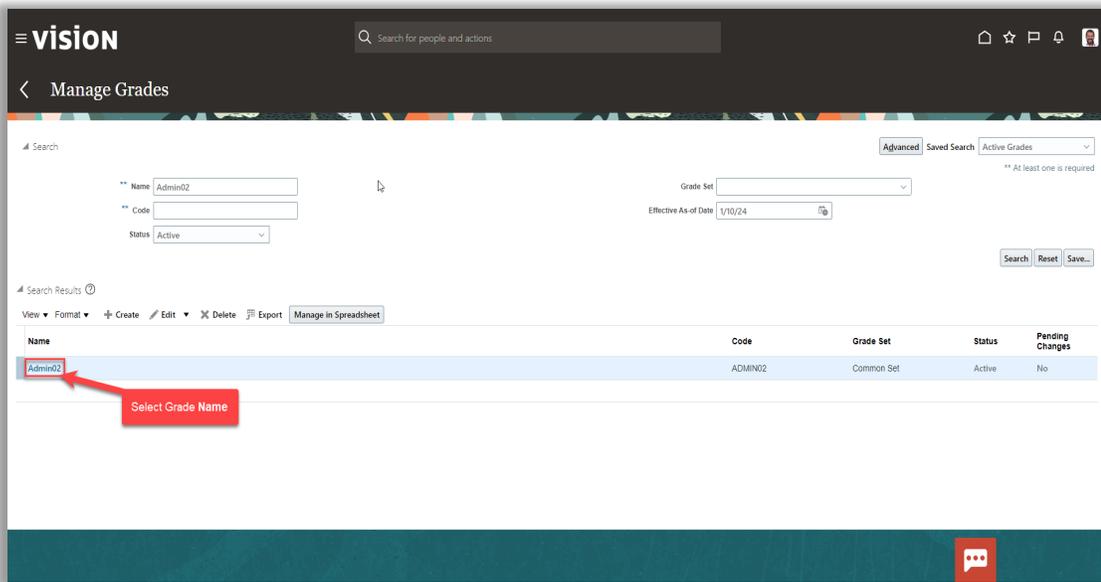
Scroll down and under **Workforce Structures**, click **Manage Grades**. As a note, we can search **Manage Grades** by clicking Ctrl F



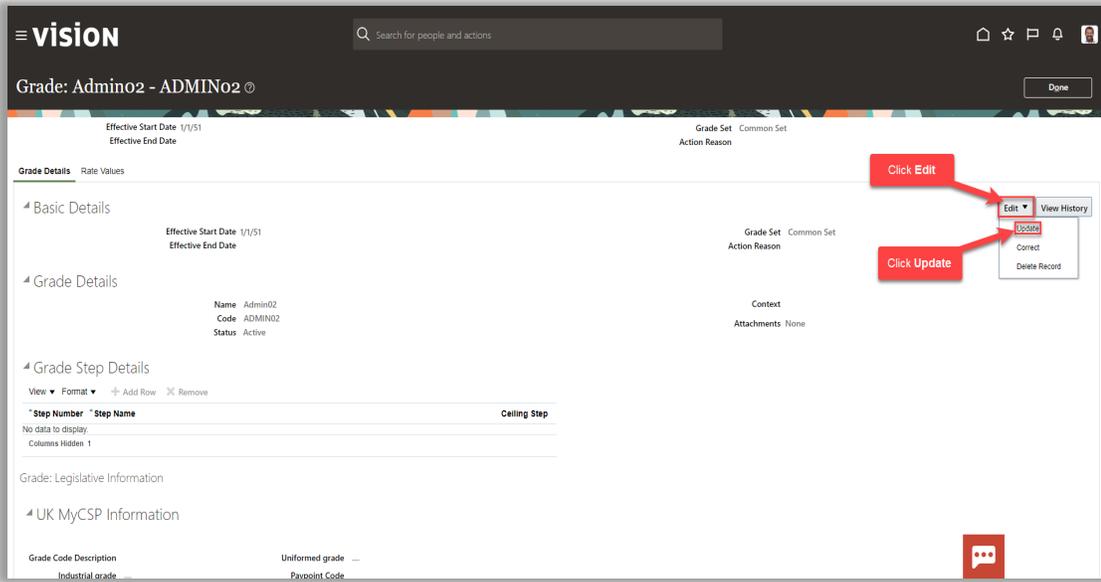
To manage a grade, enter the grade **Name** and click **Search**



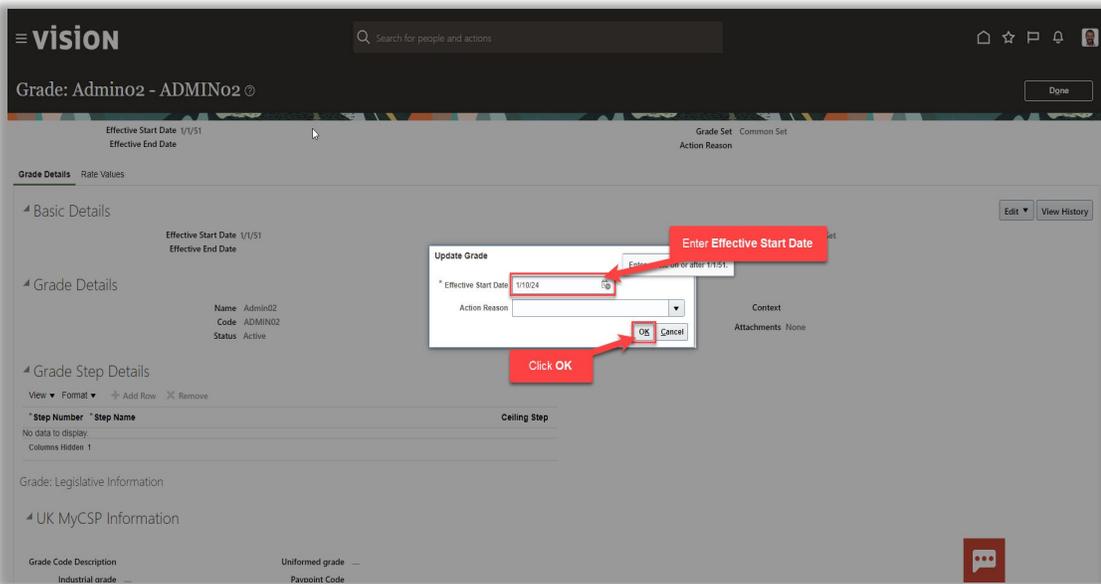
Select the Grade Name



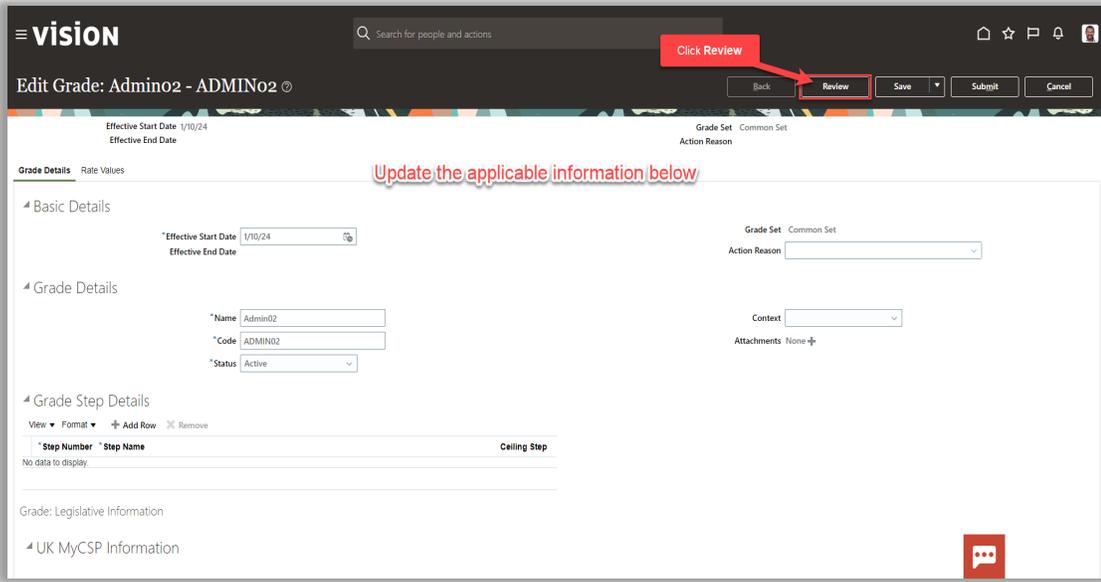
To update the Grade Details, click **Edit** and **Update**



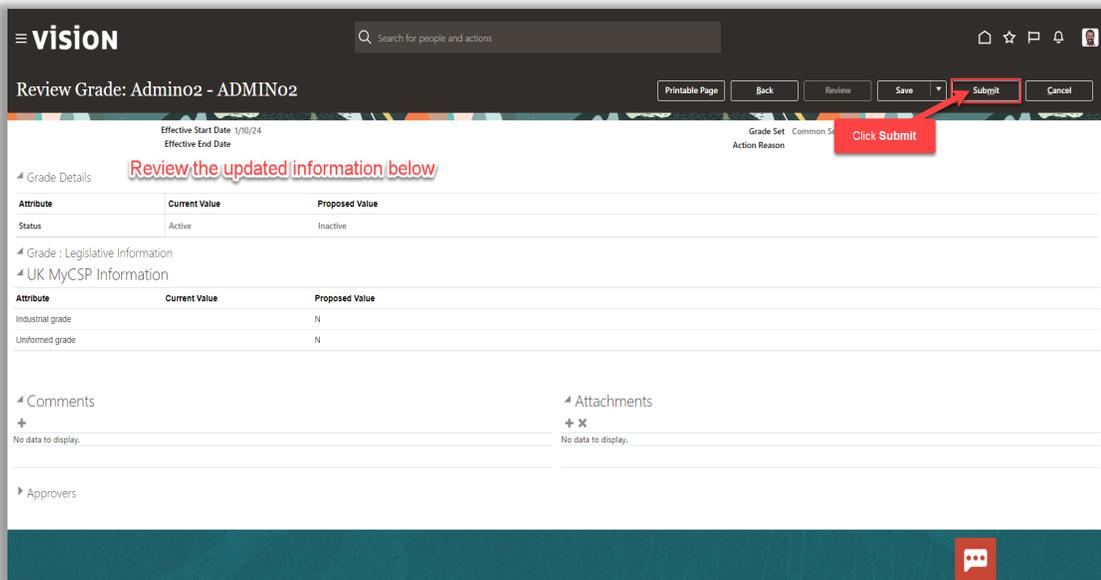
Enter the Effective Start Date, Action Reason, if applicable, and Click OK



Here we can make the applicable updates and click **Review**



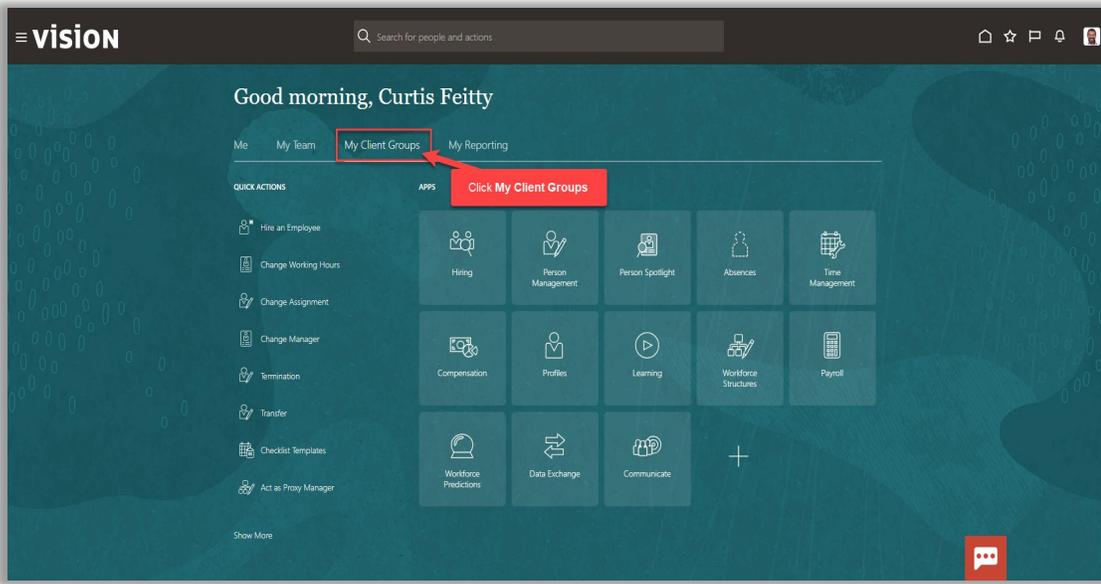
From the Review Screen, we can review the updated information and click **Submit**



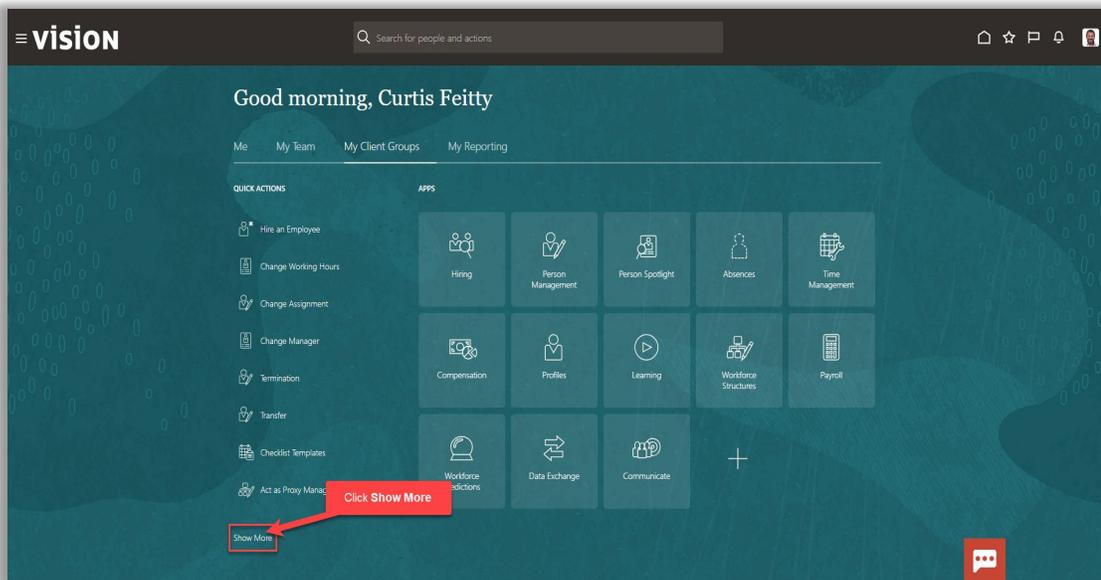
Create Grade Rates

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

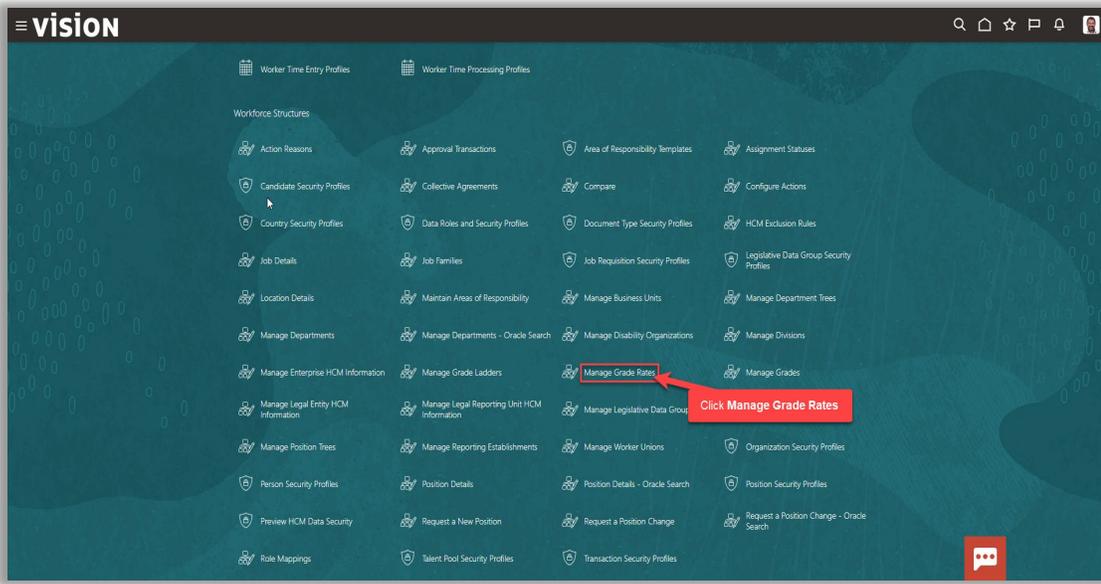
From the home screen, click **My Client Groups**



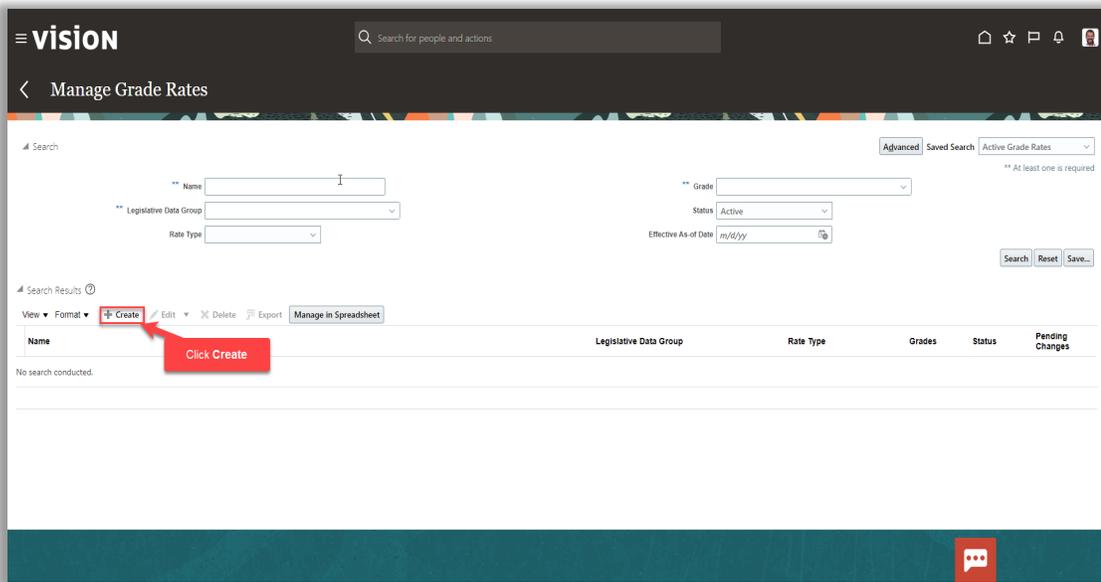
Next, click **Show More**



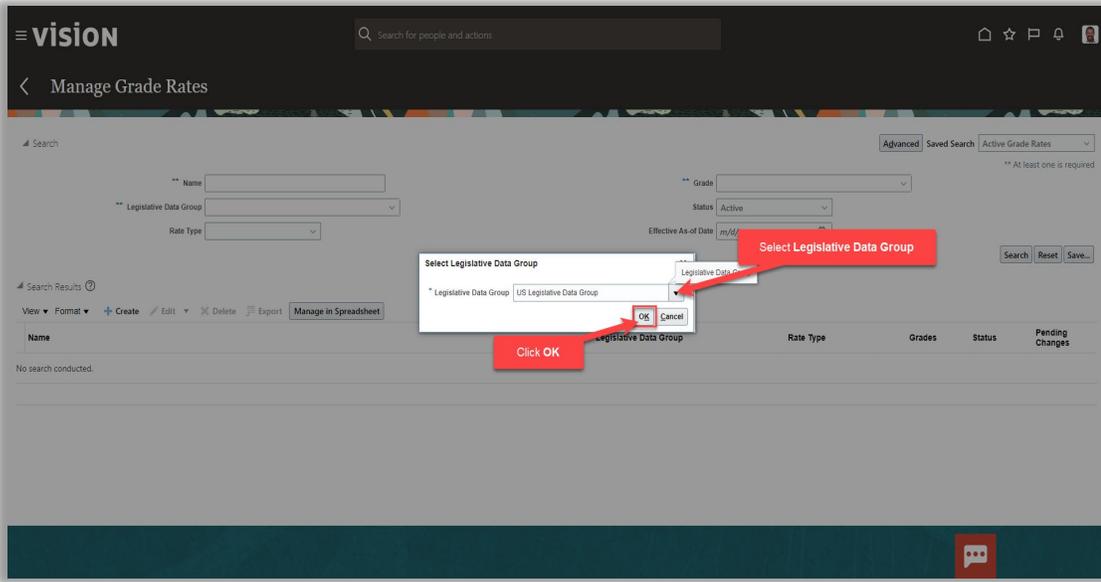
Scroll down and under **Workforce Structures**, click **Manage Grade Rates**. As a note, we can search **Manage Grade Rates** by clicking Ctrl F



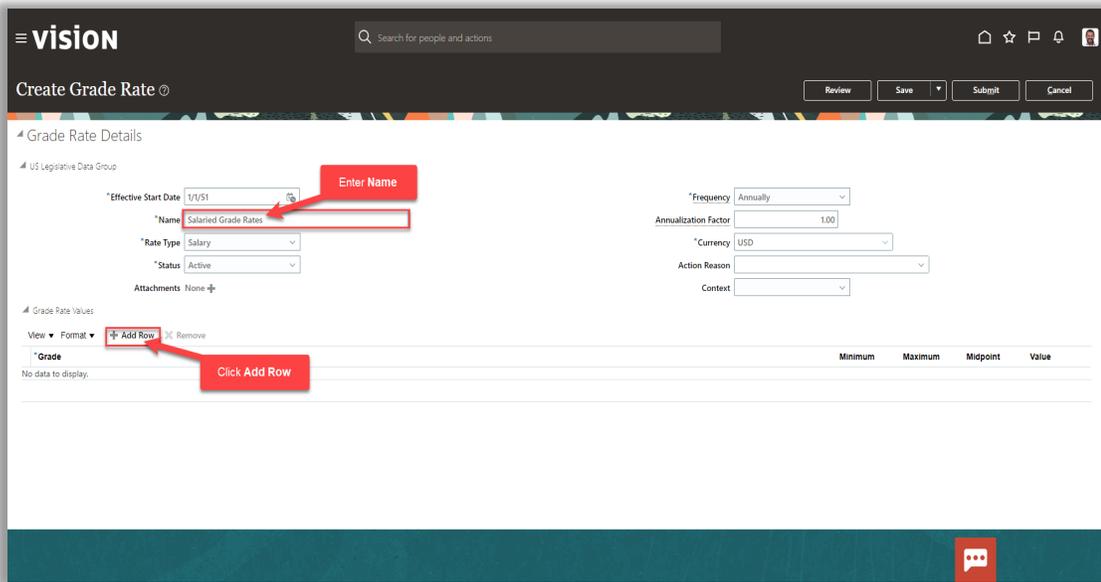
Click Create



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



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**



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

vision Search for people and actions

Create Grade Rate Review Save Submit Cancel

Grade Rate Details

US Legislative Data Group

*Effective Start Date: 1/1/51

*Name: Salaried Grade Rates

*Rate Type: Salary

*Status: Active

Attachments: None

*Frequency: Annually

Annualization Factor: 1.00

*Currency: USD

Action Reason: [Dropdown]

Context: [Dropdown]

Grade Rate Values

View Format Add Row Remove

Grade	Minimum	Maximum	Midpoint	Value
Admin01 ADMIN01 Common Set COMMON				

Select Grade

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 Search for people and actions

Create Grade Rate Review Save Submit Cancel

Grade Rate Details

US Legislative Data Group

*Effective Start Date: 1/1/51

*Name: Salaried Grade Rates

*Rate Type: Salary

*Status: Active

Attachments: None

*Frequency: Annually

Annualization Factor: 1.00

*Currency: USD

Action Reason: [Dropdown]

Context: [Dropdown]

Grade Rate Values

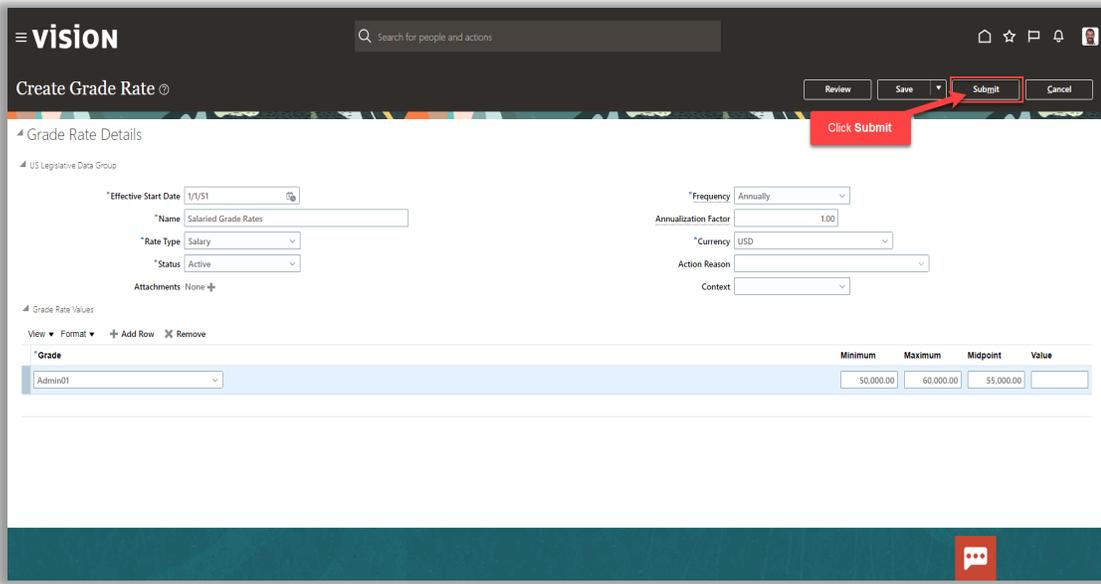
View Format Add Row Remove

Grade	Minimum	Maximum	Midpoint	Value
Admin01	50,000.00	60,000.00	55,000.00	

Click Review

Enter Minimum and Maximum

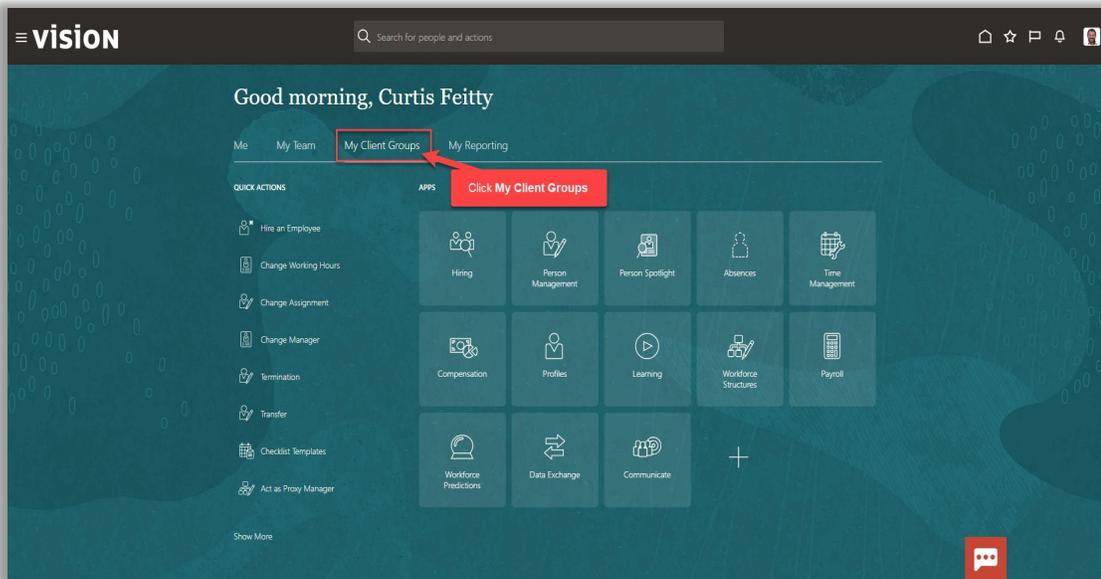
Click **Submit**



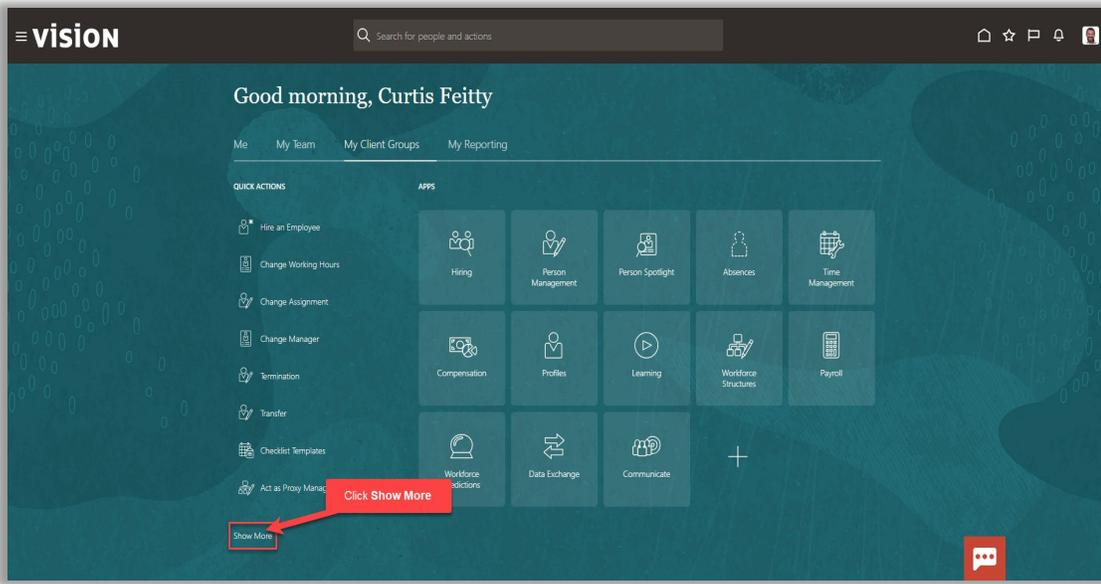
Manage Grade Rates

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

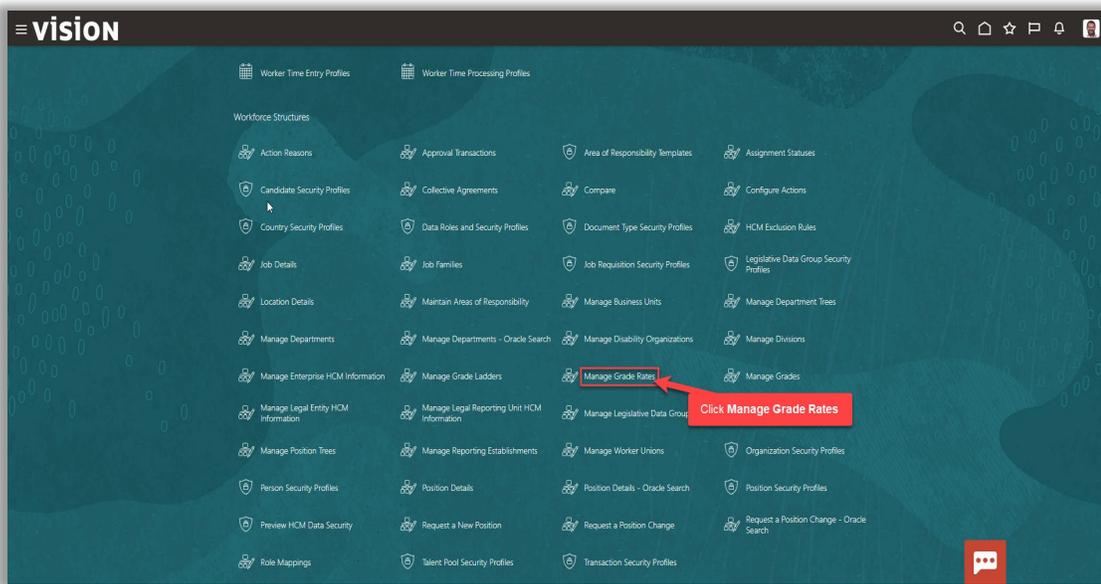
From the home screen, click **My Client Groups**



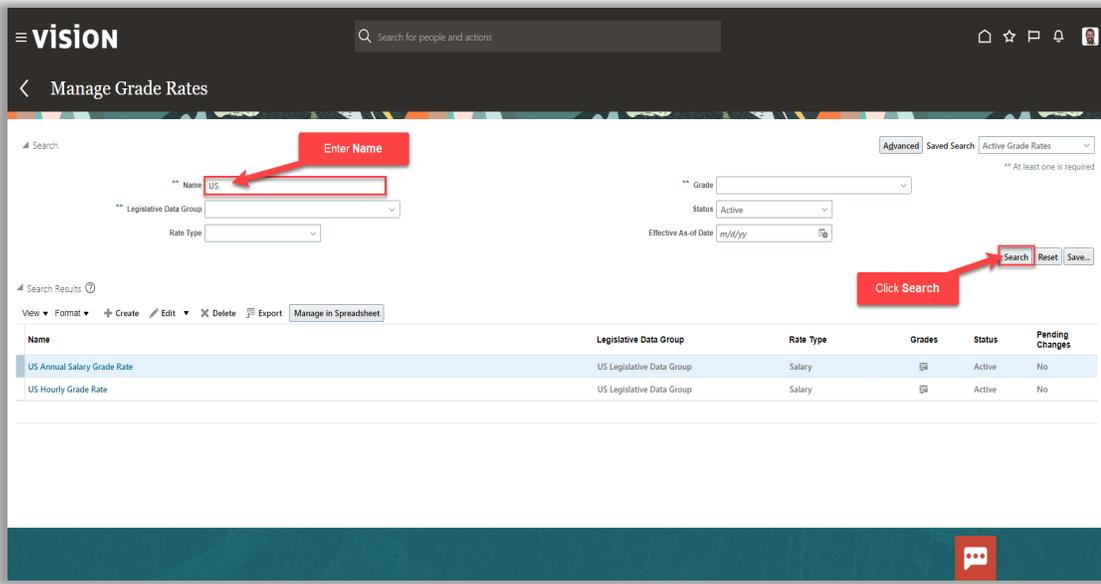
Next, click **Show More**



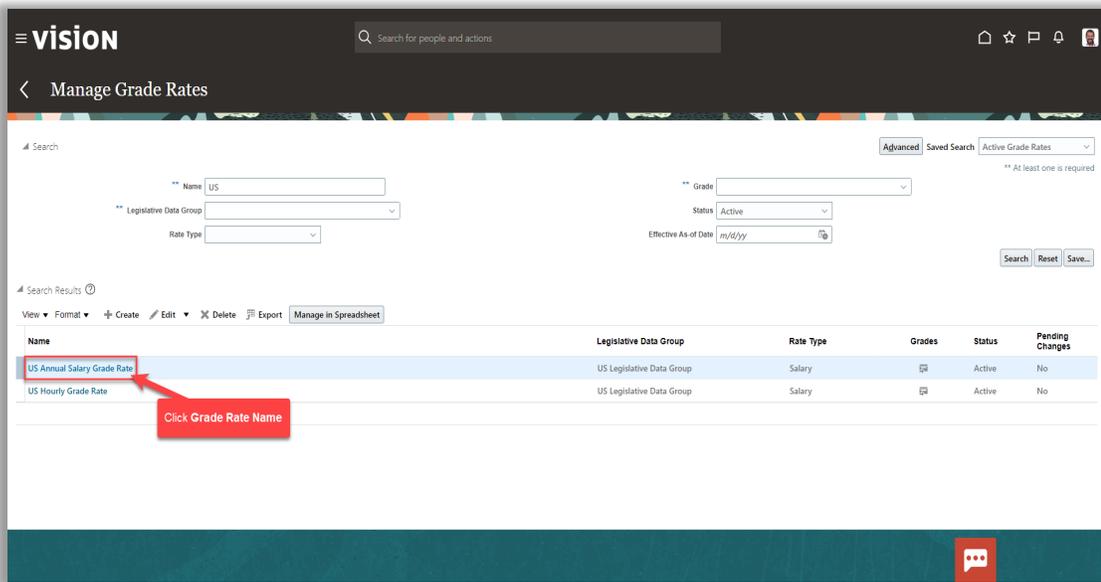
Scroll down and under **Workforce Structures**, click **Manage Grade Rates**. As a note, we can search **Manage Grade Rates** by clicking Ctrl F



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



Click Grade Rate Name



To update the Grade Rate Details, click **Edit** and **Update**

Grade Rate: US Annual Salary Grade Rate

Effective Start Date: 1/1/51
 Effective End Date:
 Legislative Data Group: US Legislative Data Group
 Name: US Annual Salary Grade Rate
 Rate Type: Salary
 Status: Active

Frequency: Annually
 Annualization Factor: 1.00
 Currency: USD
 Action Reason: Context
 Attachments: None

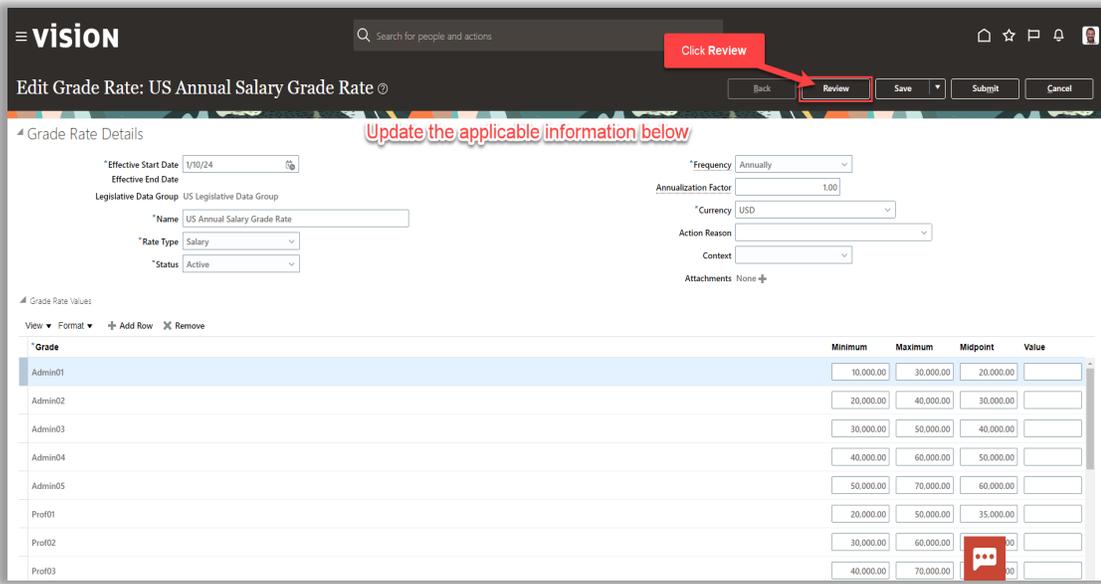
Grade	Minimum	Maximum	Midpoint	Value
Admin01	10,000.00	30,000.00	20,000.00	
Admin02	20,000.00	40,000.00	30,000.00	
Admin03	30,000.00	50,000.00	40,000.00	
Admin04	40,000.00	60,000.00	50,000.00	
Admin05	50,000.00	70,000.00	60,000.00	
Prof01	20,000.00	50,000.00	35,000.00	
Prof02	30,000.00	60,000.00	45,000.00	
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	

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

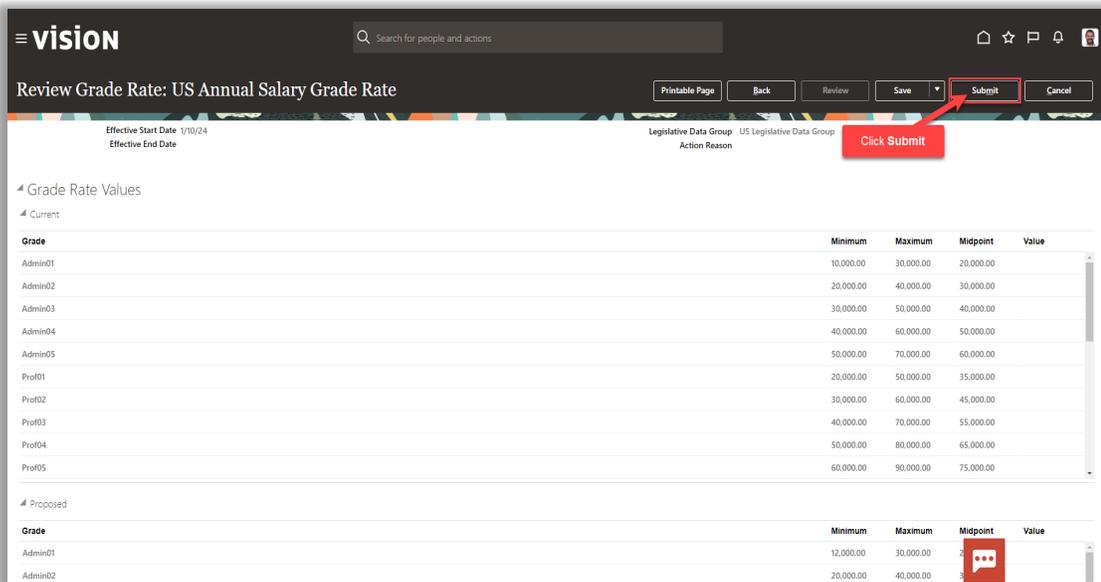
Update Grade Rate
 Enter a date or enter a list...

* Effective Start Date: 1/10/24
 Action Reason:
 OK Cancel

Here we can make the applicable updates and click **Review**



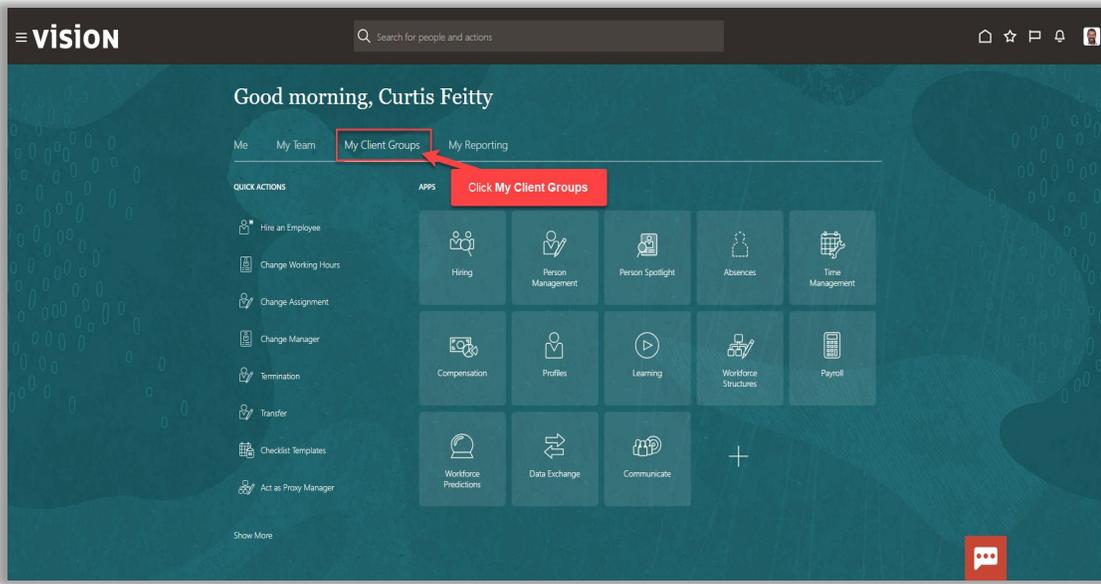
From the Review Screen, we can review the updates and click **Submit**



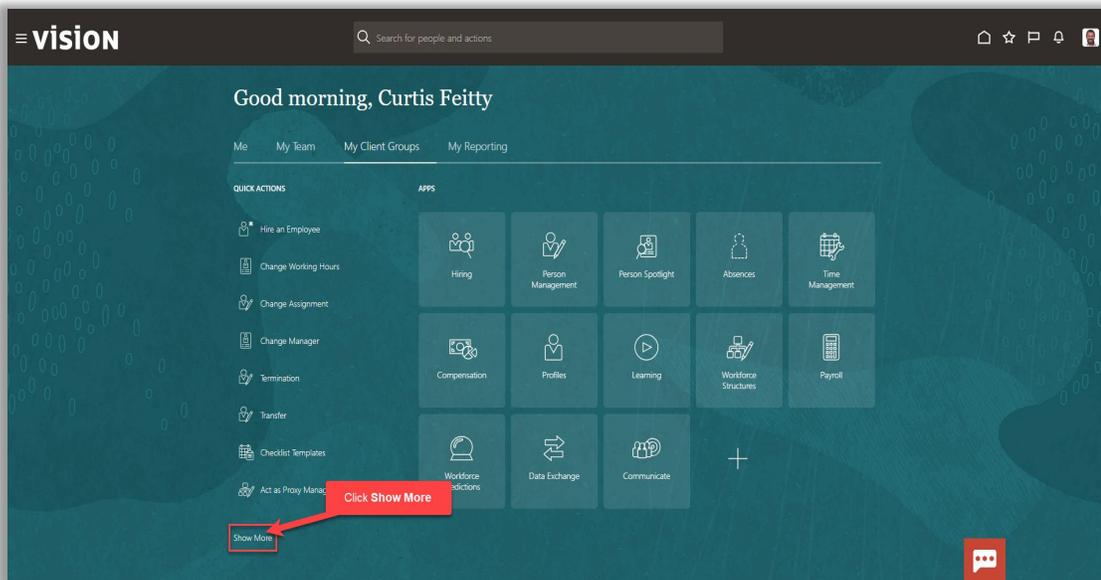
Add Valid Grades To A Job

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

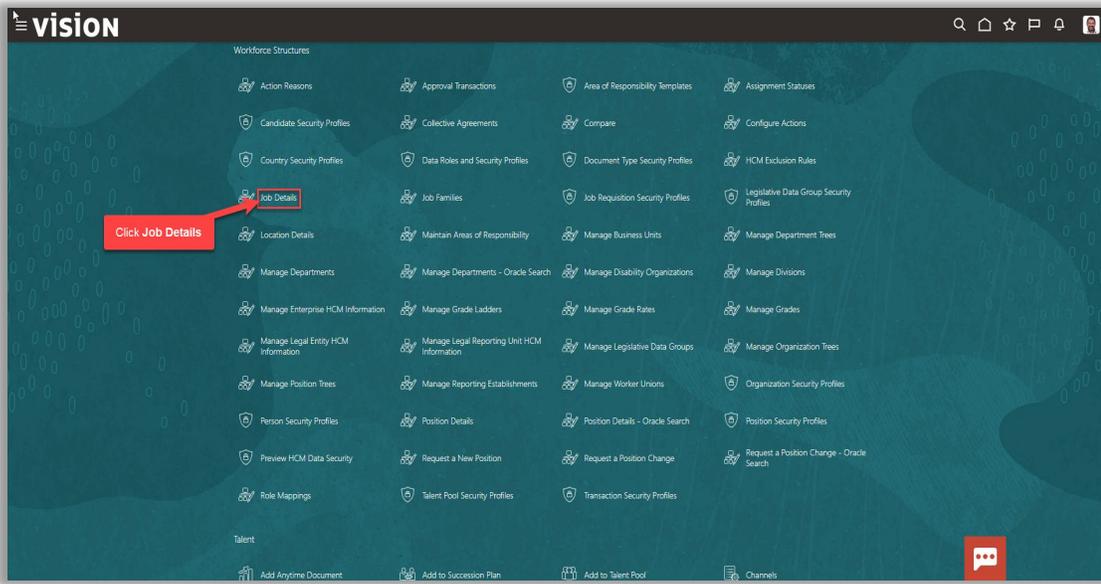
From the home screen, click **My Client Groups**



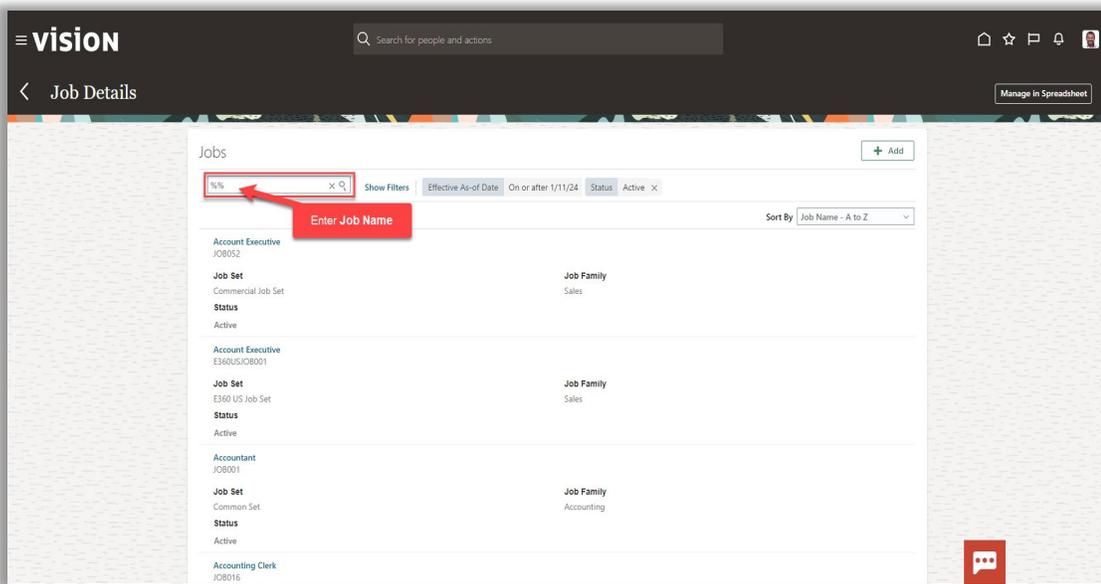
Next, click **Show More**



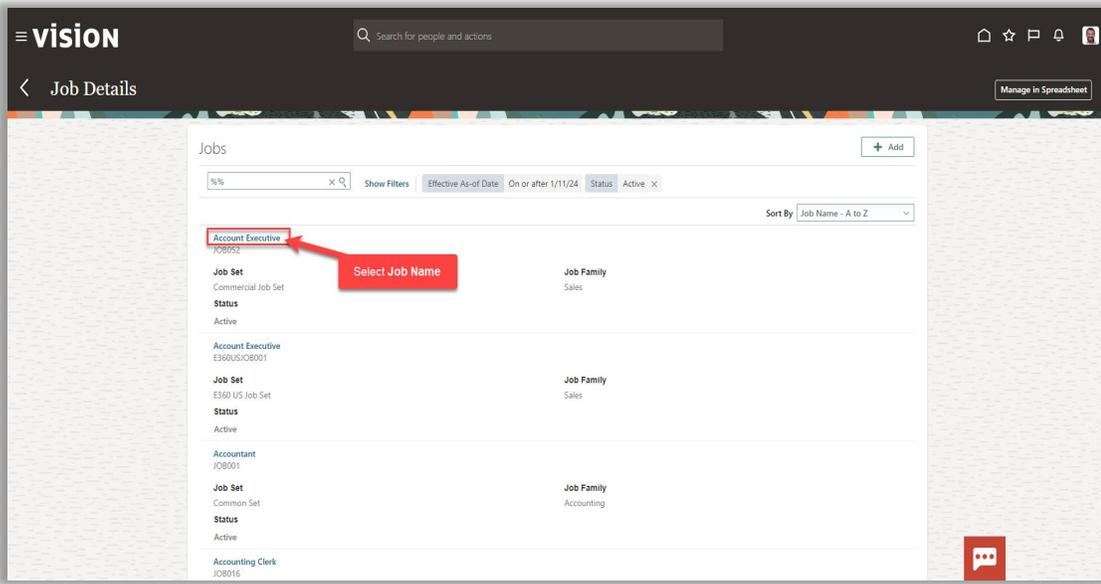
Scroll down and under **Workforce Structures**, click **Job Details**. As a note, we can search **Job Details** by clicking Ctrl F



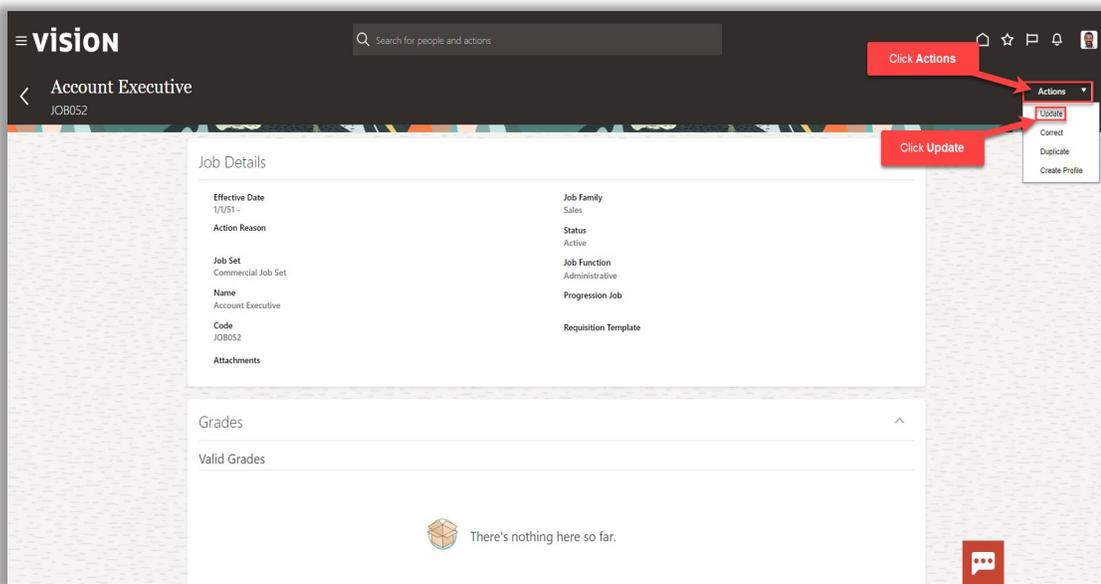
Search for the **Job** by entering the **Job Name**. To populate all jobs, enter **%%** and click the **magnifying glass**



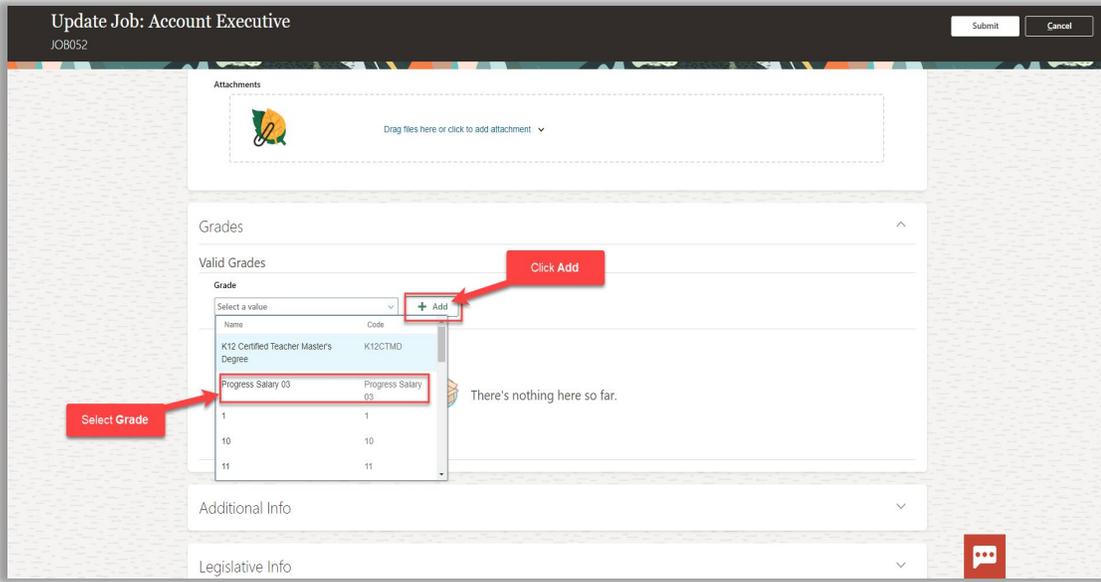
Select the **Job Name**



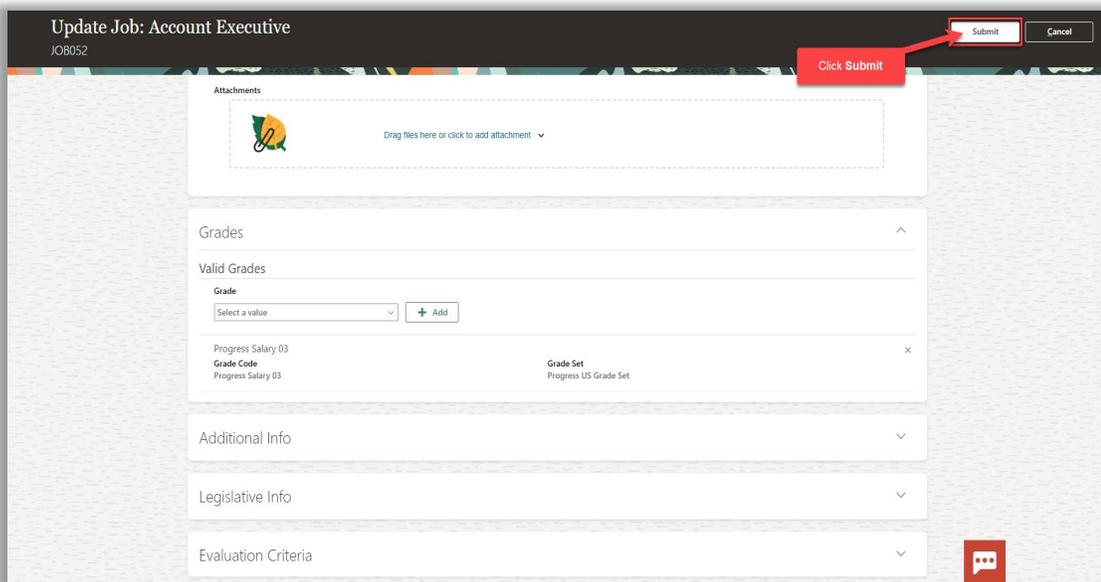
Next, click **Actions** then **Update**. As a note, if we select **Update**, we will update the information as of the effective date entered in the next steps. If we select **Correct**, we will correct the existing information as of the existing effective date (in this example, as of 1/1/1951)



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**



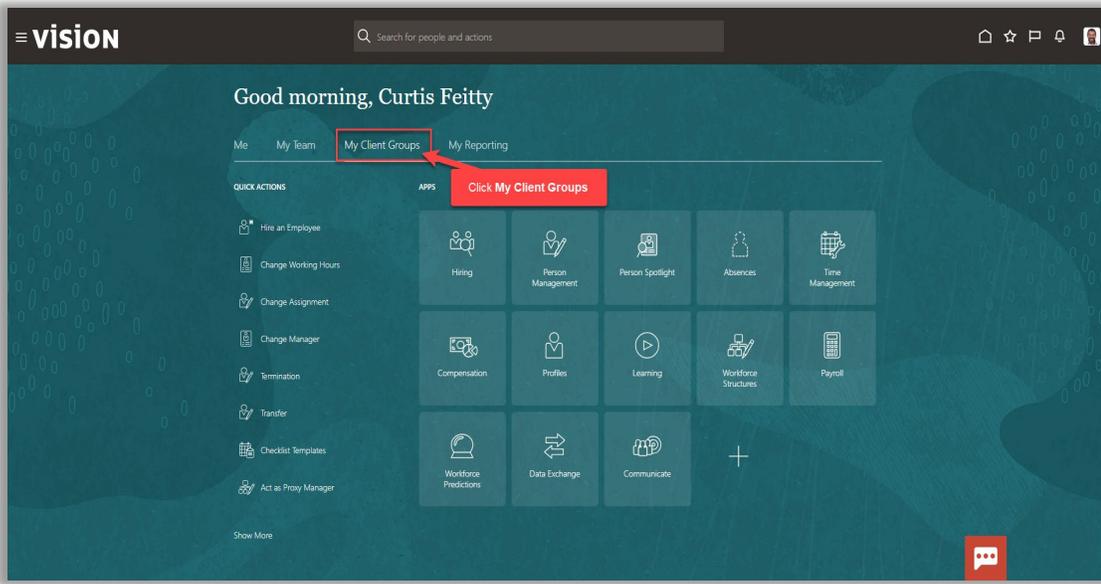
Once complete, click **Submit**. The Job Details have been updated as of the **Effective Start Date**



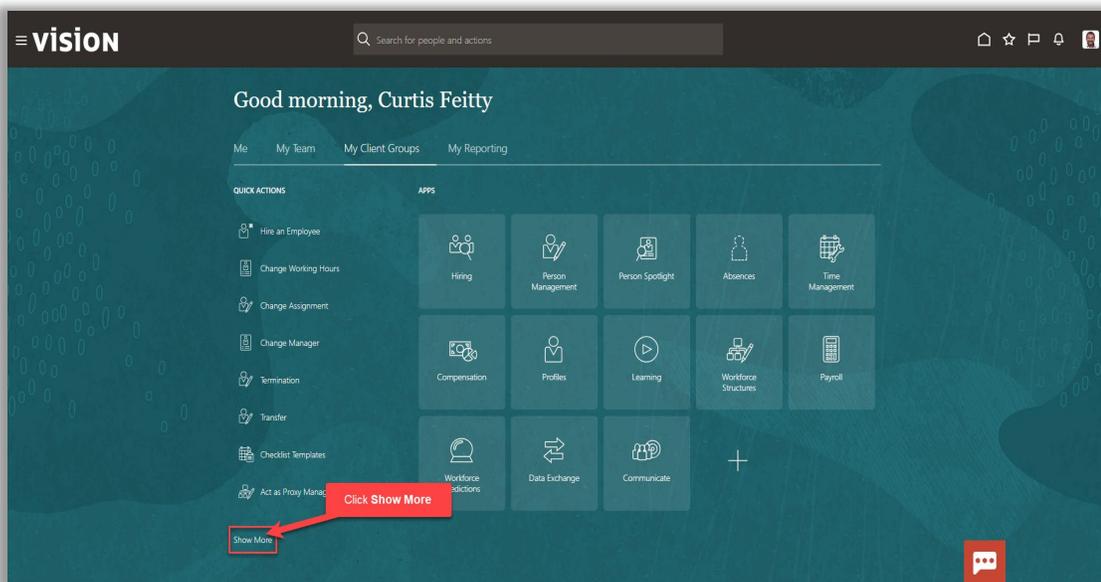
Create A Position

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

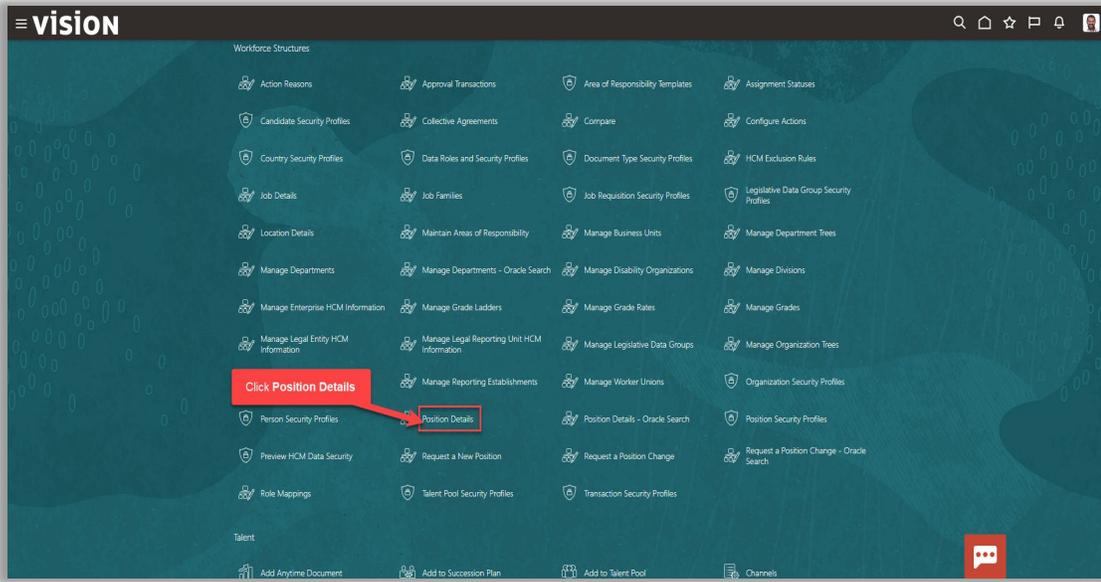
From the home screen, click **My Client Groups**



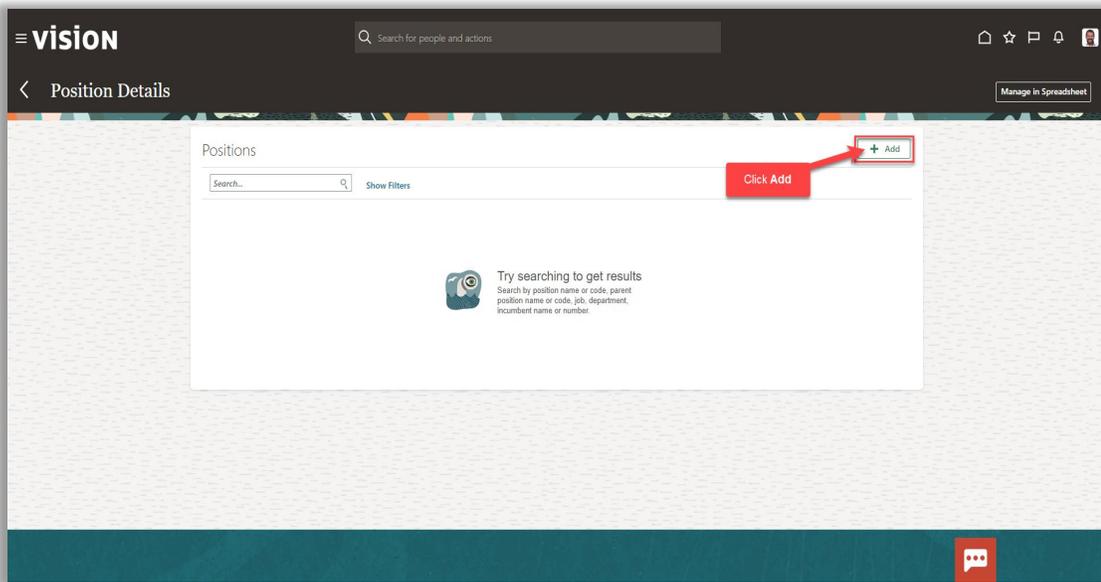
Next, click **Show More**



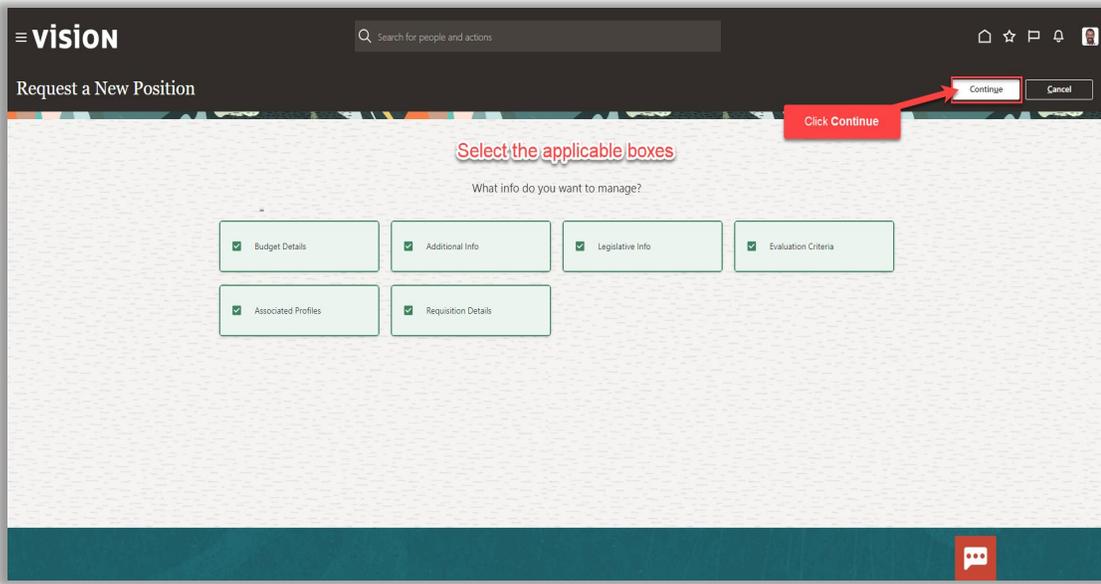
Scroll down and under **Workforce Structures**, click **Position Details**. As a note, we can search **Position Details** by clicking Ctrl F



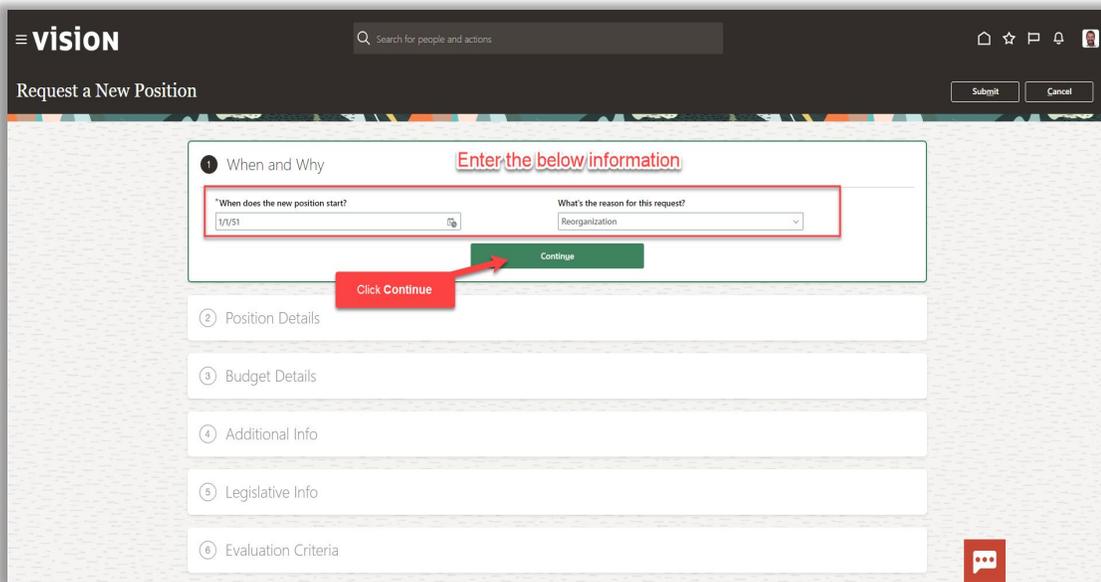
Click Add



Select the applicable boxes and click **Continue**



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



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

Request a New Position

1 When and Why Edit

2 Position Details Edit

Enter the below information

Parent Position Controller	End Time /mmmm a
*Business Unit Progress US Business Unit	Regular or Temporary Regular
*Name Assistant Controller	Hiring Status Approved
*Department Executive Office Prg US	Requisition Template Select a value
*Job Controller	Security Clearance Select a value
Location Reston	Probation Period Select a value
Grade Ladder Select a value	Union Select a value
Grade Admin03	Bargaining Unit Select a value
Add Another Grade	Collective Agreement Select a value
Entry Step Select a value	Delegate Position Select a value
Manager	

Submit Cancel

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

vision

1 When and Why Edit

2 Position Details Edit

3 Budget Details Edit

Enter the below information

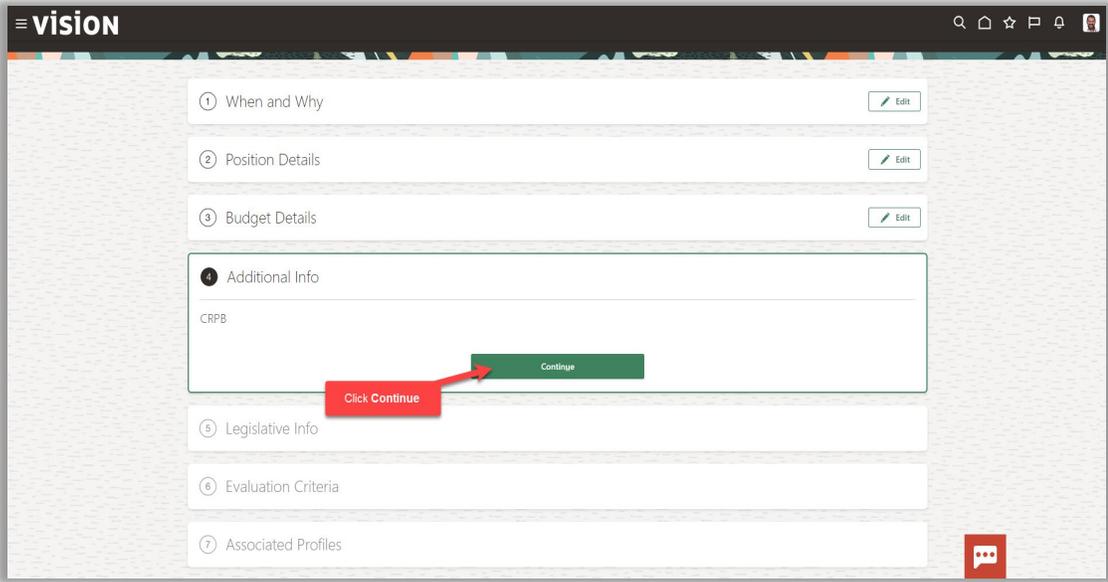
Budget Amount 75,000 USD US Dollar	Head Count 1
Is the position budgeted? Yes	FTE 1
Cost Center Select a value	Type Single incumbent
Funded from existing positions? No	

Click Continue Continue

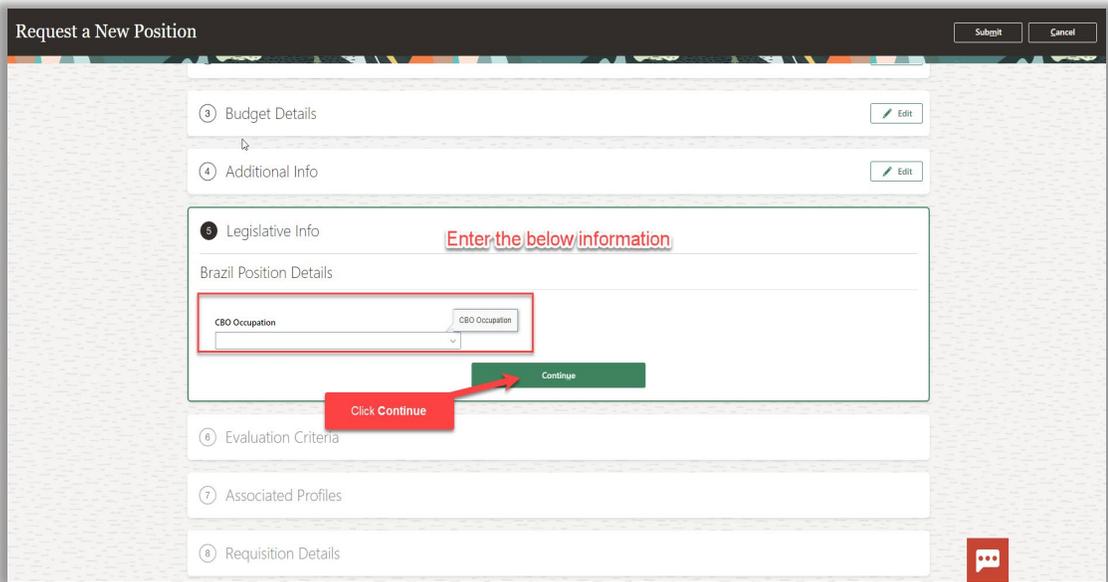
4 Additional Info

5 Legislative Info

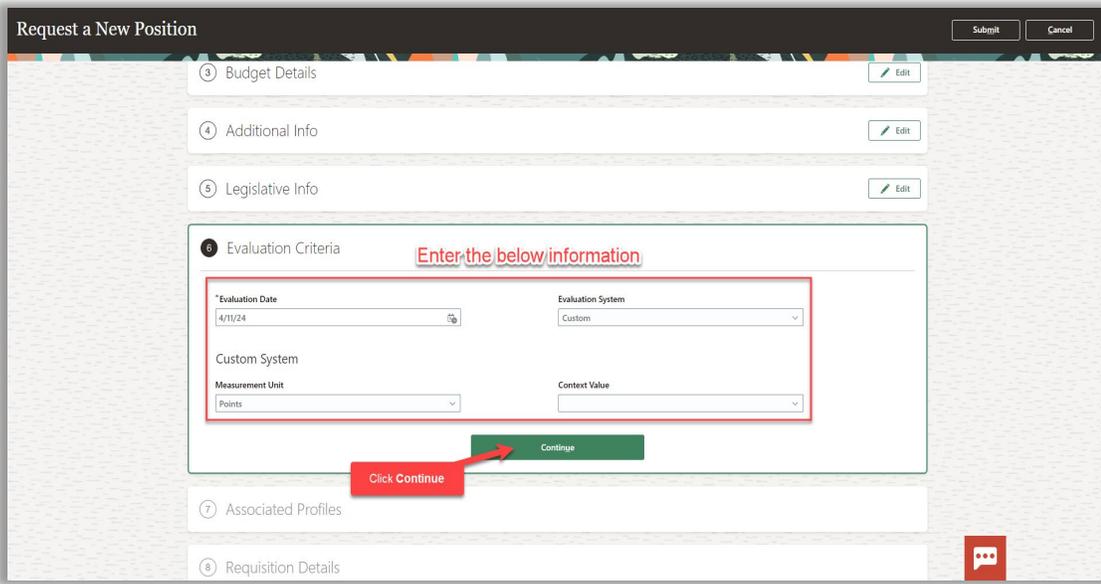
Enter the information in the **Additional Info** section according to our setups, then click **Continue**



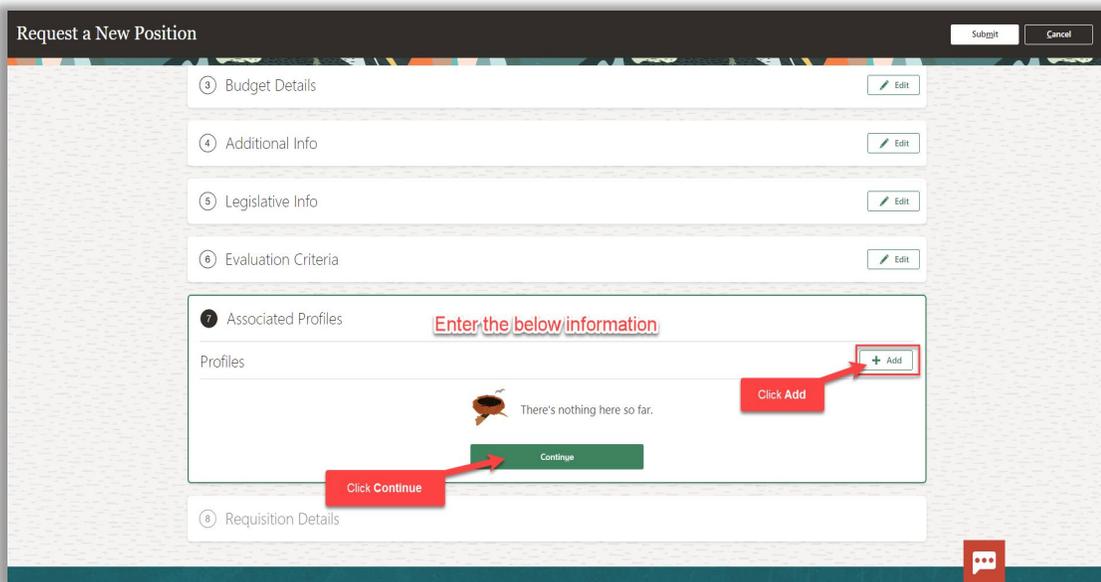
Enter the information in the **Legislative Info** section according to our setups, then click **Continue**



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



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



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

Request a New Position

8 Evaluation Criteria Edit

7 Associated Profiles Edit

6 Requisition Details **Enter the below information**

* Recruiting Type: Executive

* Requisition Title: Assistant Controller

* Number of Openings: Limited, 1

Display in Organization Chart:

* Hiring Manager: Jon Blue Chairman

* Recruiter: Conrad Recruiter Recruiter

* Organization: Vision Corporation

* Primary Location: Reston, VA, United States

Other Locations: Add Another Location

Legal Employer: Select a value

Primary Work Location: Reston

Other Work Locations: Add Another Work Location

Grade: Admin03

Automatically Open Requisition for Sourcing: No

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

vision

Request a New Position

Search for people and actions

Submit Cancel

Click Submit

1 When and Why Edit

2 Position Details Edit

3 Budget Details Edit

4 Additional Info Edit

5 Legislative Info Edit

6 Evaluation Criteria Edit

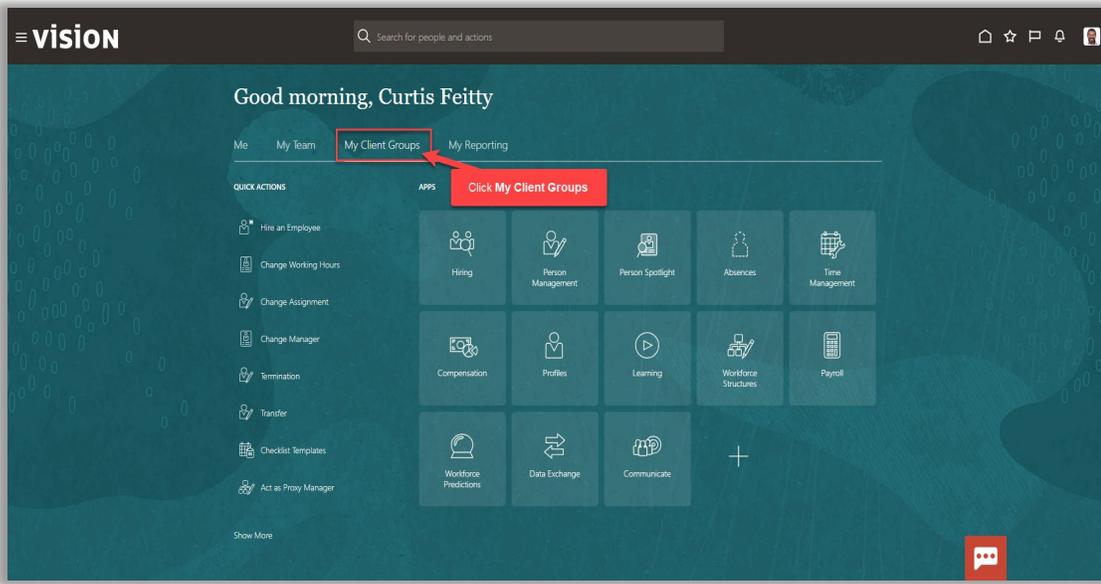
7 Associated Profiles Edit

8 Requisition Details Edit

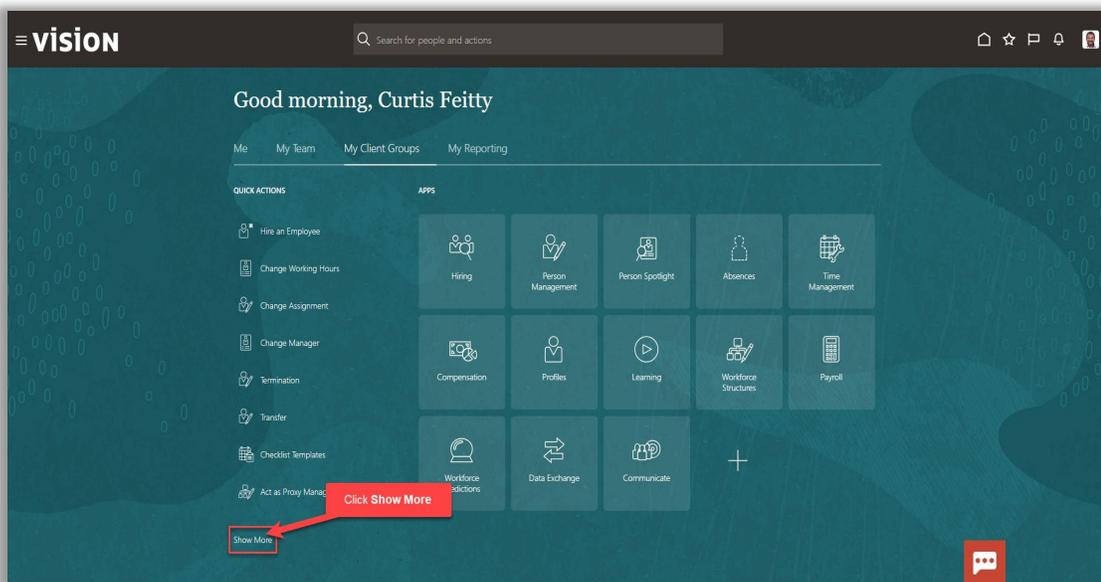
Manage Positions

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

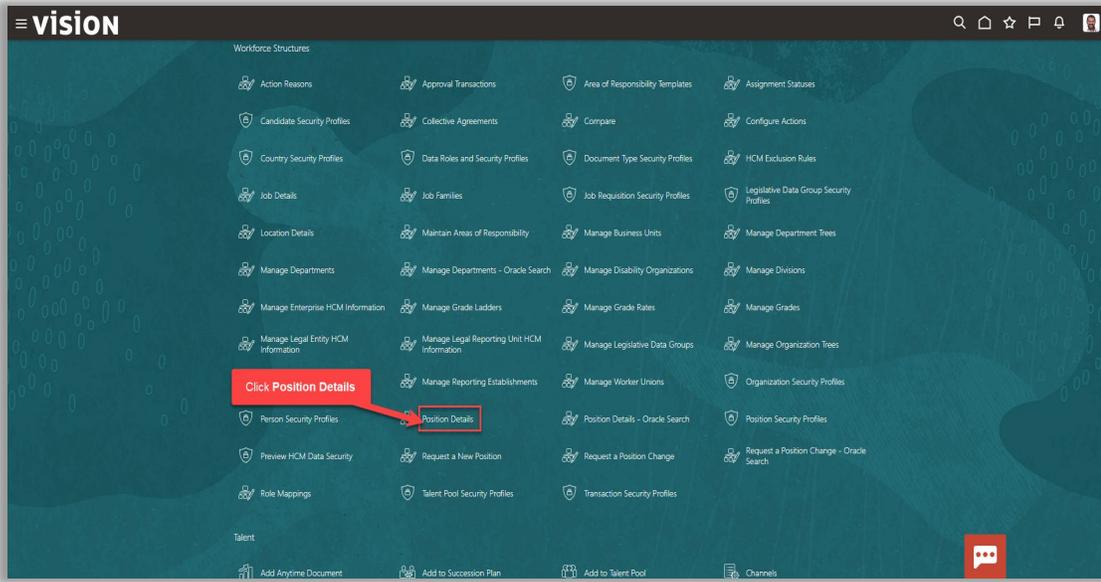
From the home screen, click **My Client Groups**



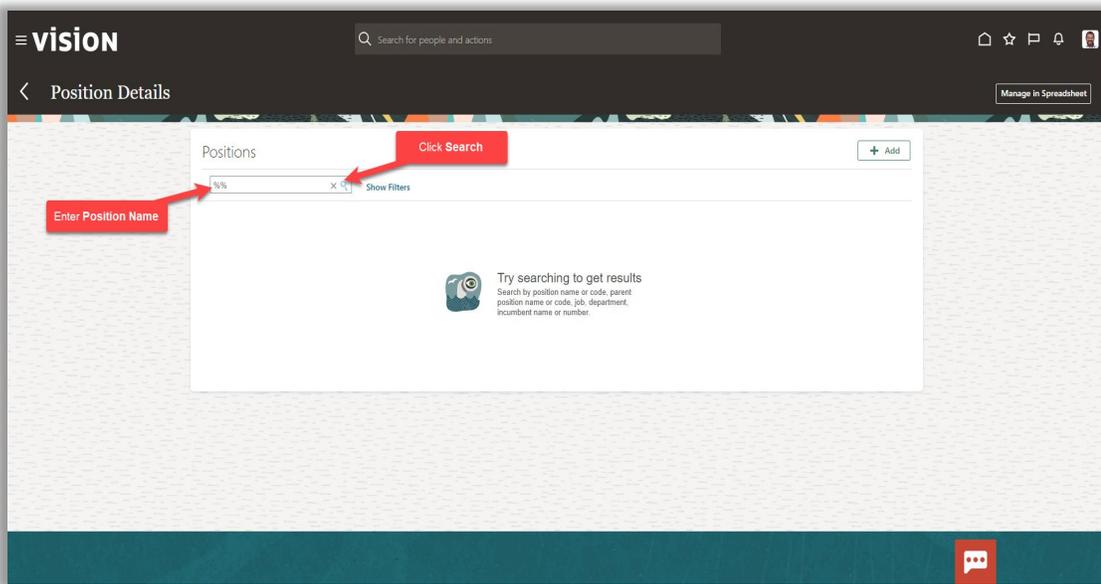
Next, click **Show More**



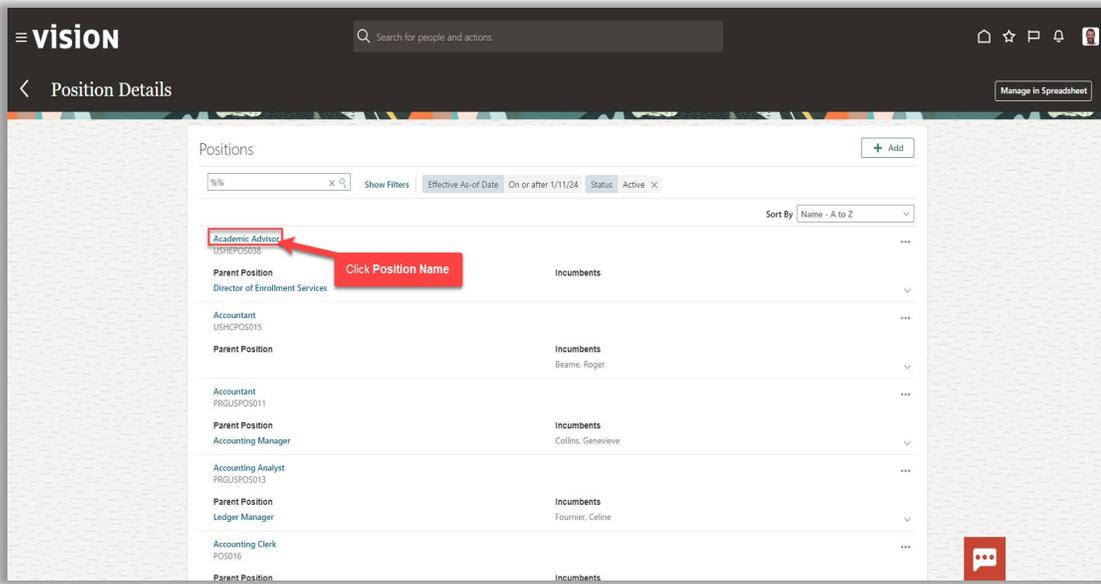
Scroll down and under **Workforce Structures**, click **Position Details**. As a note, we can search **Position Details** by clicking Ctrl F



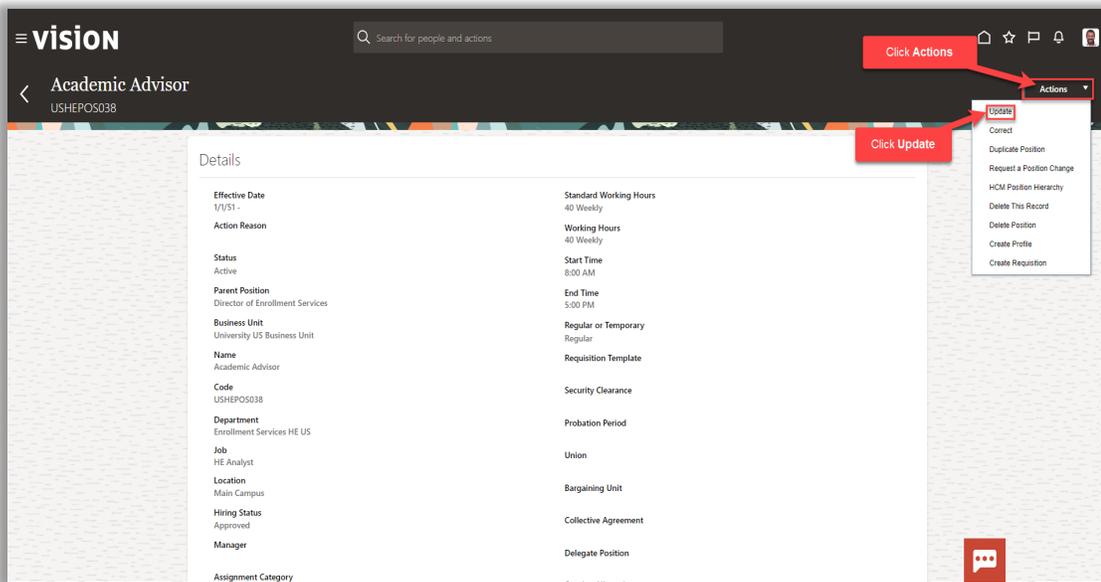
Enter the **Position Name** and click **Magnifying Glass**. To generate a full list of positions, enter **%%** in the search bar and click the magnifying glass



Click **Position Name**



Click **Actions** and **Update**



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

VISION Search for people and actions

Update Position: Academic Advisor
USHEPOS038

Submit Cancel

Click Submit

Update the below applicable information

Details

*Effective Date: 1/11/24 (Enter a date between 1/25/1 and 12/31/12)

Action Reason: Select a value

*Status: Active

Parent Position: Director of Enrollment Services

*Business Unit: University US Business Unit

*Name: Academic Advisor

Code: USHEPOS038

*Department: Enrollment Services HE US

*Job: HE Analyst

Location

Working Hours: 40 Weekly

Start Time: 8:00 AM

End Time: 5:00 PM

Regular or Temporary: Regular

Requisition Template: Select a value

Security Clearance

Probation Period

Union

Bargaining Unit

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**

VISION Search for people and actions

Good morning, Curtis Feitty

Me My Team **My Client Groups** My Reporting

QUICK ACTIONS

APPS

Click My Client Groups

Hire an Employee

Change Working Hours

Change Assignment

Change Manager

Termination

Transfer

Checklist Templates

Act as Proxy Manager

Hiring

Person Management

Person Spotlight

Absences

Time Management

Compensation

Profiles

Learning

Workforce Structures

Payroll

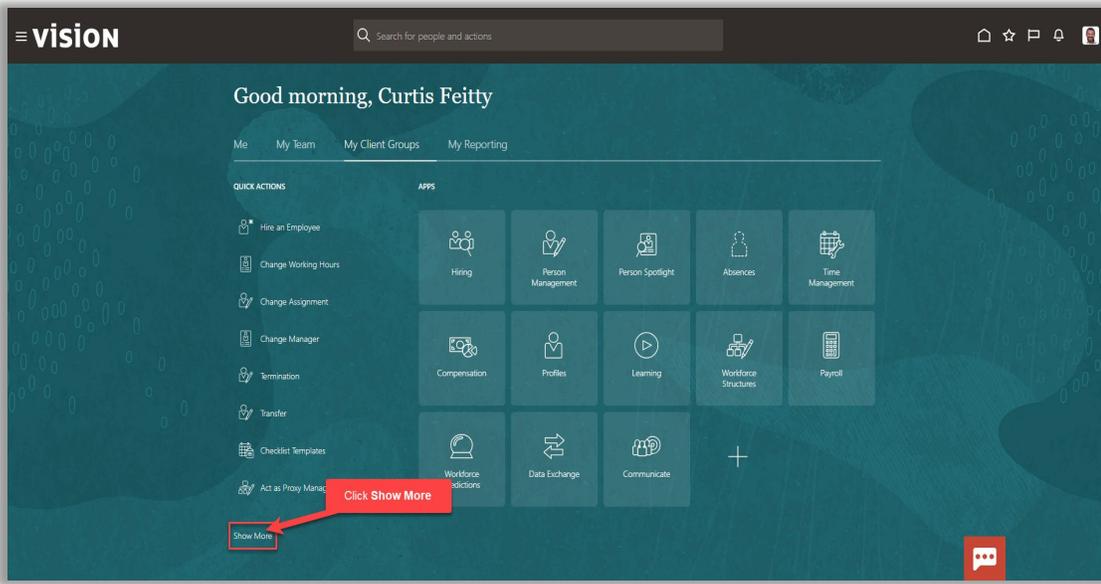
Workforce Predictions

Data Exchange

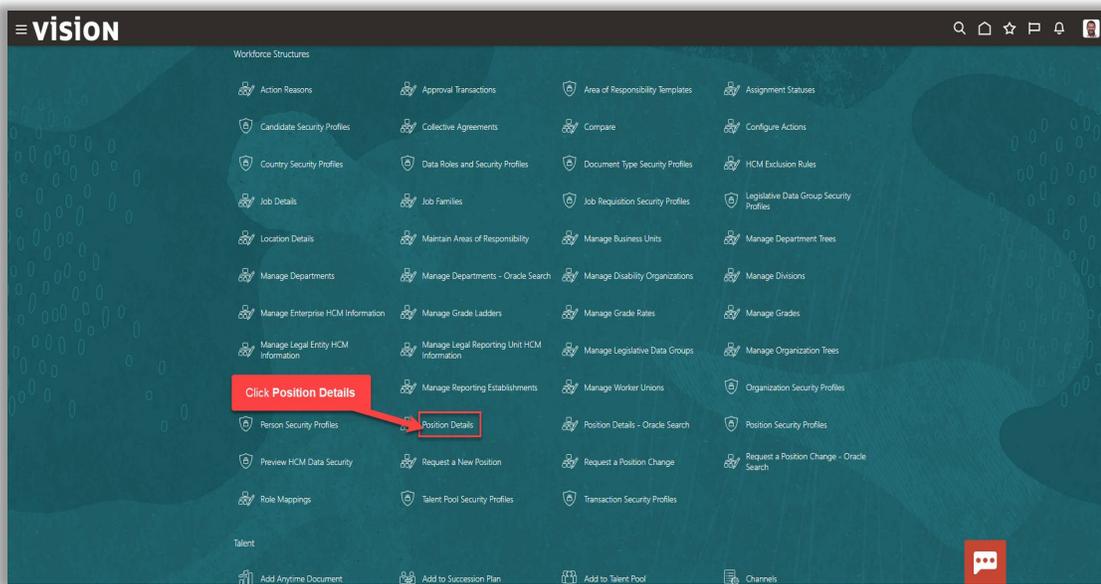
Communicate

Show More

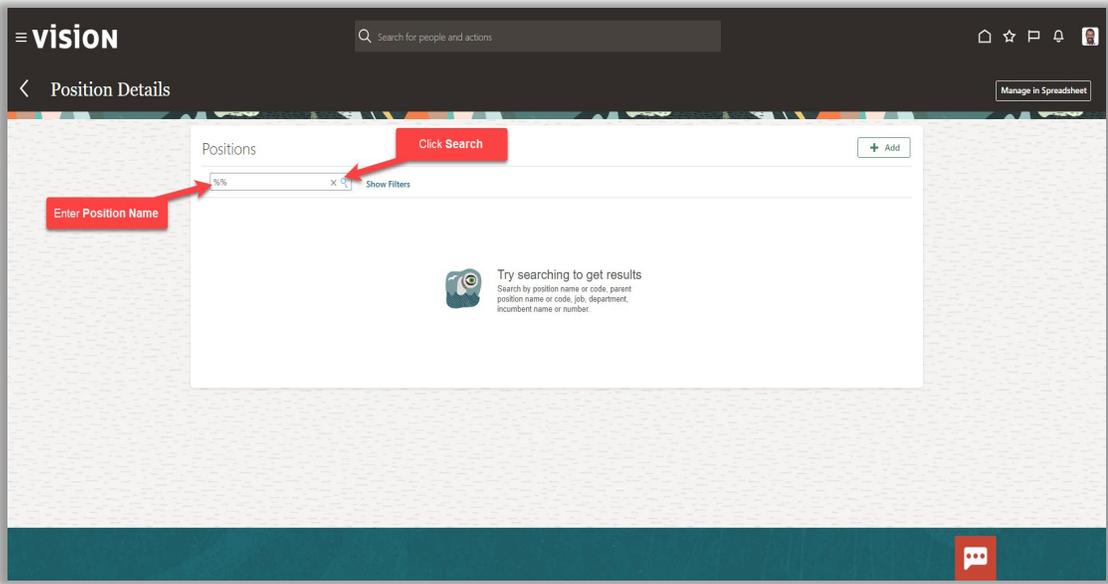
Next, click **Show More**



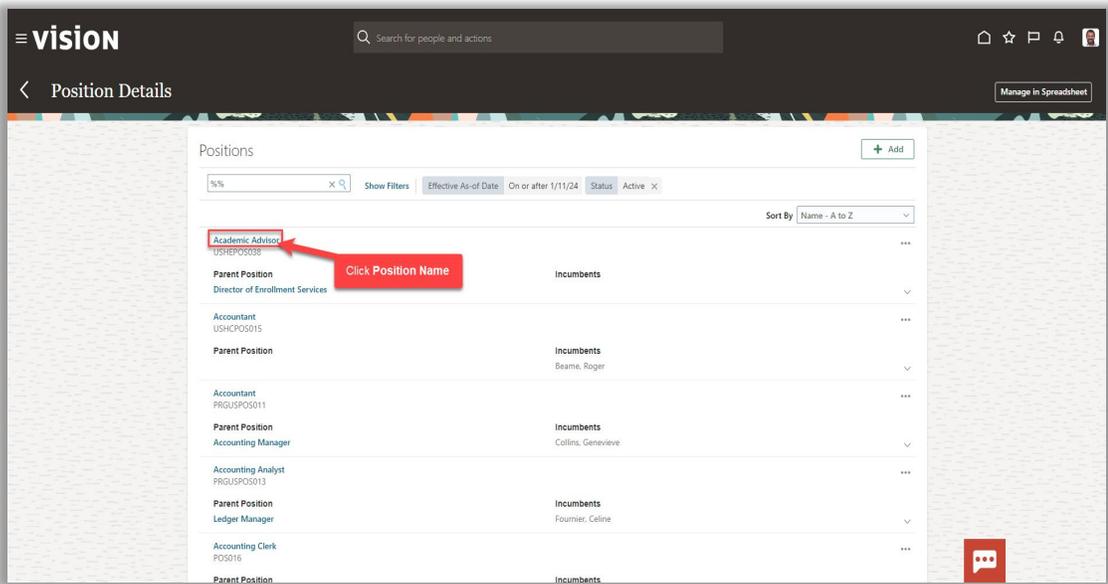
Scroll down and under **Workforce Structures**, click **Position Details**. As a note, we can search **Position Details** by clicking Ctrl F



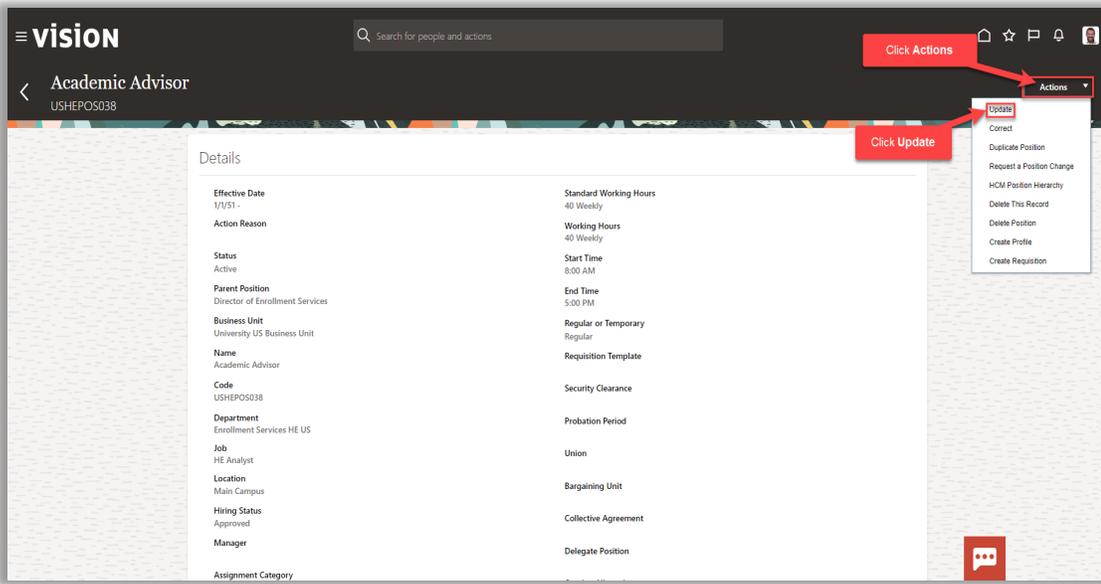
Enter the **Position Name** and click **Magnifying Glass**. To generate a full list of positions, enter %% in the search bar and click the magnifying glass



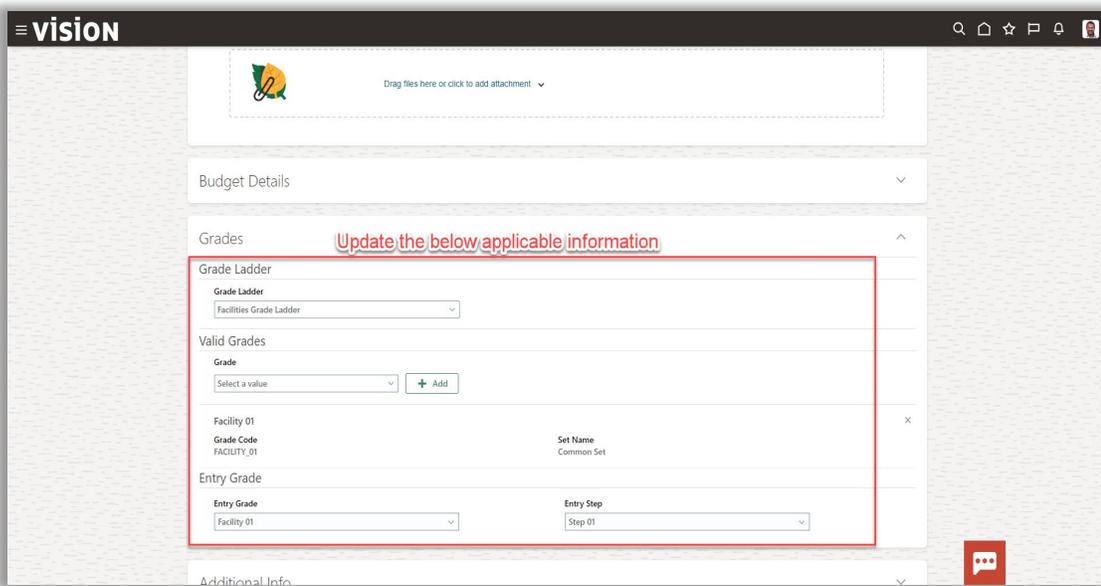
Click Position Name



Click Actions and Update



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.



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

Update Position: Academic Advisor
USHEPOS038

Click Submit

Submit Cancel

Grades

Grade Ladder

Grade Ladder
Facilities Grade Ladder

Valid Grades

Grade
Select a value + Add

Facility 01
Grade Code FACILITY_01 Set Name Common Set

Entry Grade

Entry Grade Facility 01 Entry Step Step 01

Additional Info

Legislative Info

Evaluation Criteria

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

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

vision

Search for people and actions

Good morning, Curtis Feitty

Me My Team My Client Groups My Reporting

QUICK ACTIONS

APPS

Click My Client Groups

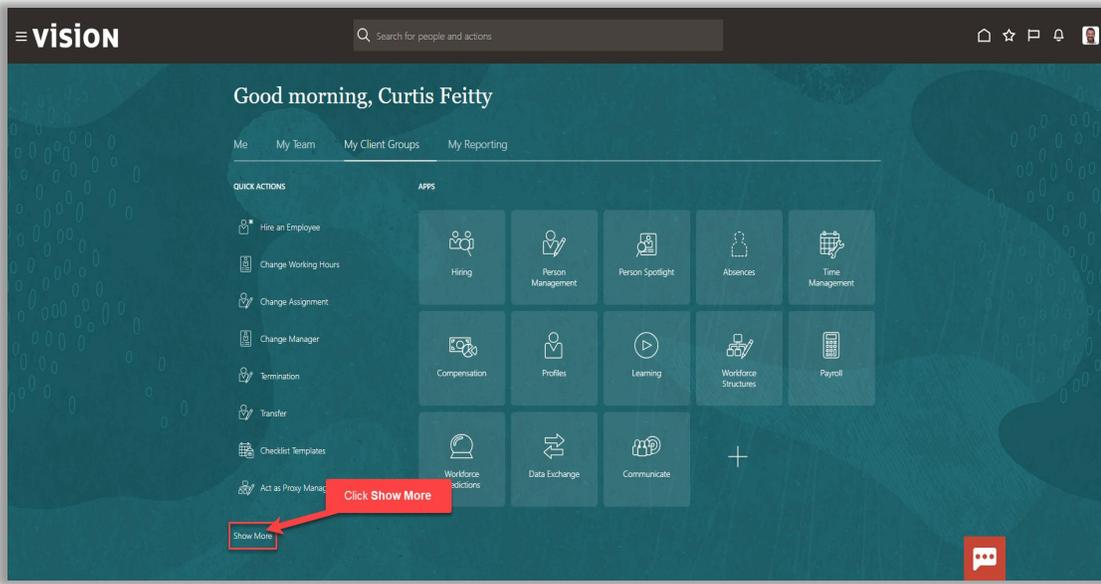
Hiring Person Management Person Spotlight Absences Time Management

Compensation Profiles Learning Workforce Structures Payroll

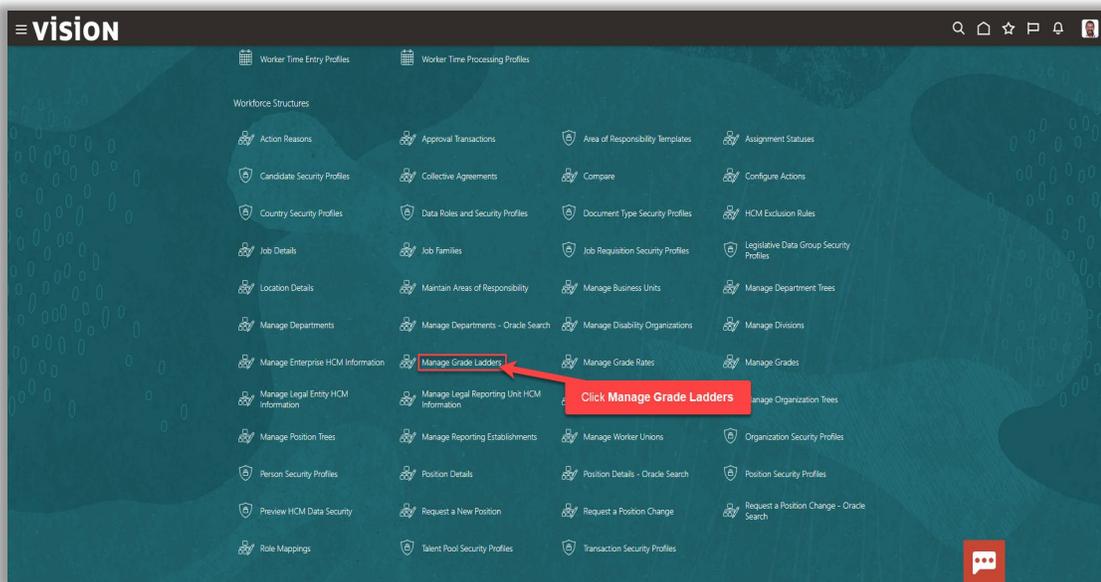
Workforce Predictions Data Exchange Communicate

Show More

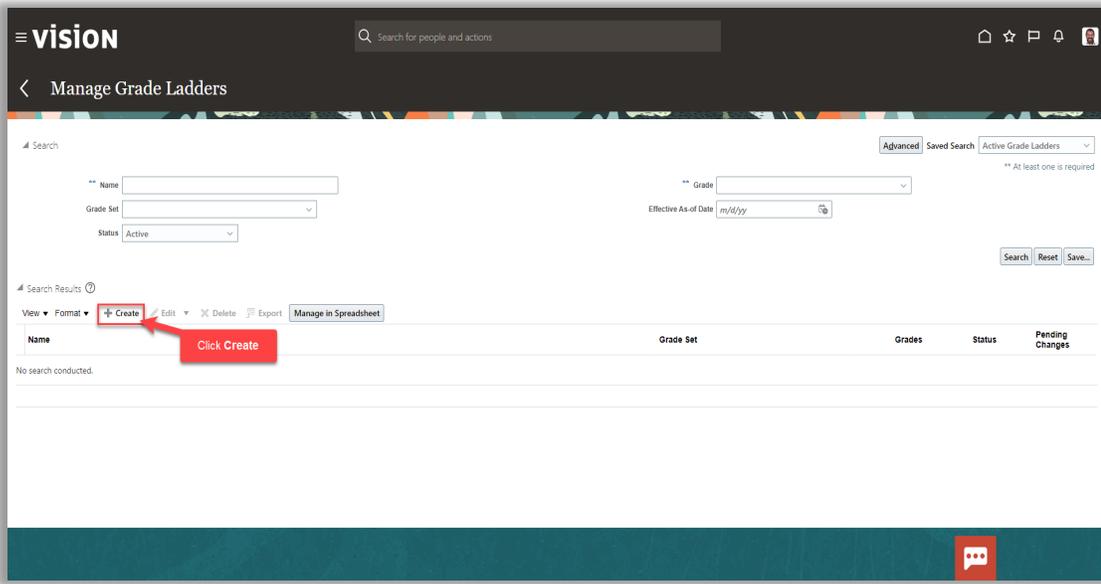
Next, click **Show More**



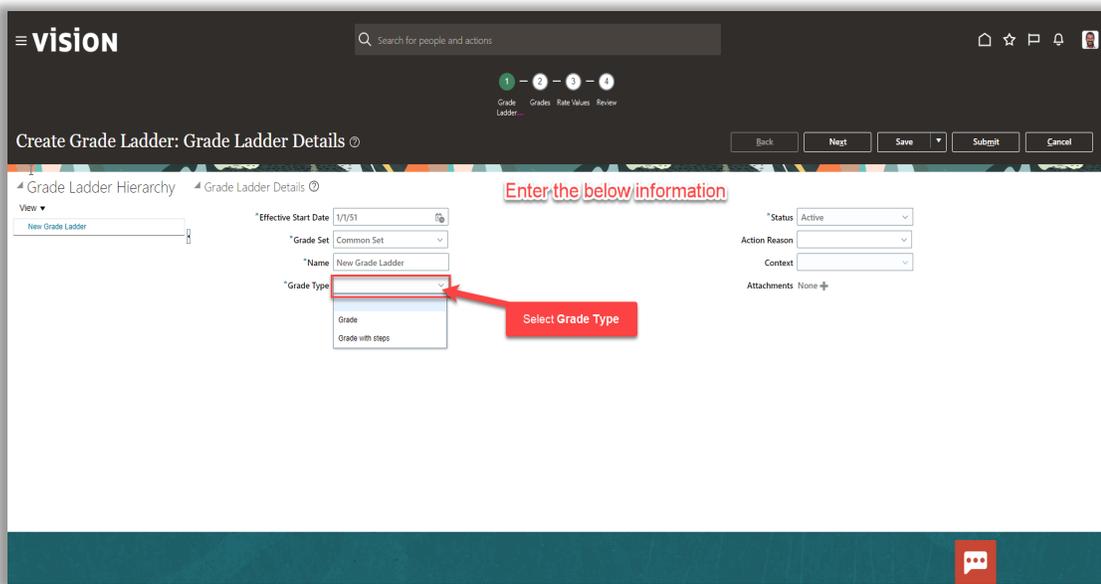
Scroll down and under **Workforce Structures**, click **Manage Grade Ladders**. As a note, we can search **Manage Grade Ladders** by clicking Ctrl F



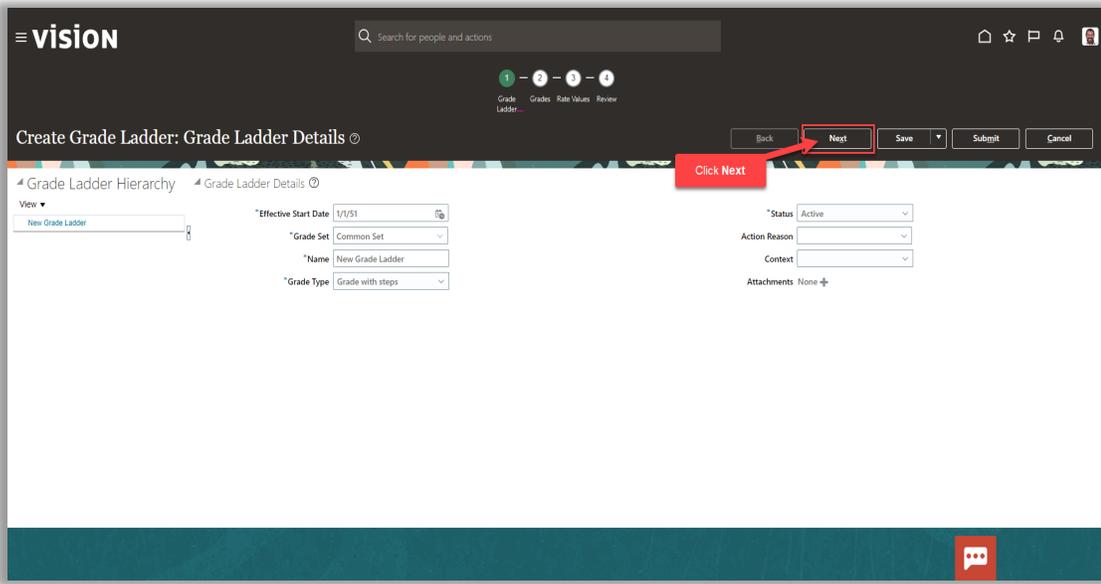
Next, click **Create**



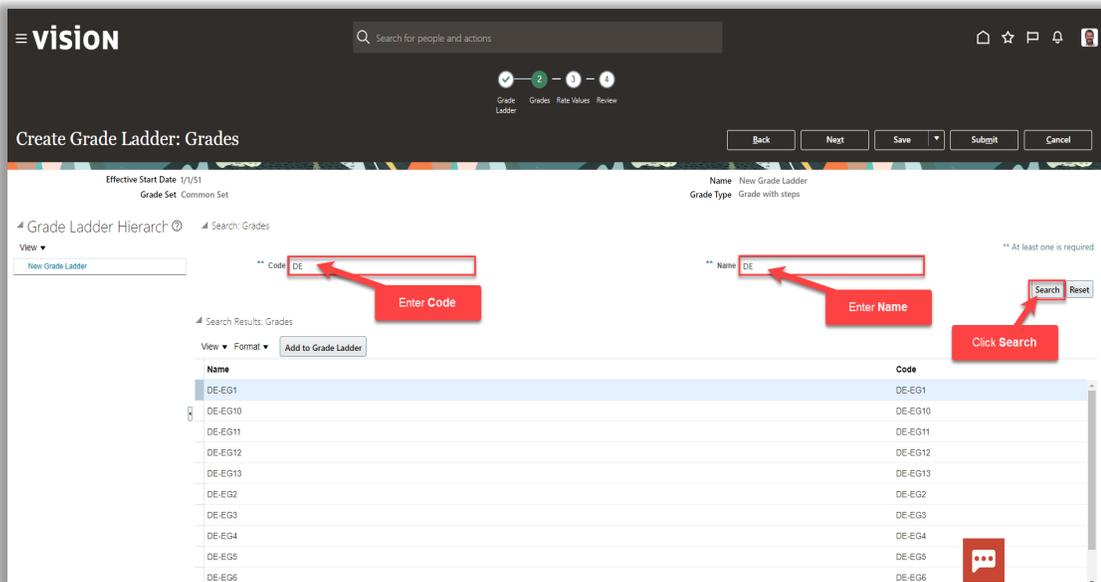
Next, enter the **Grade Ladder Details**. If we have multiple **Grade Sets**, we'll need to select the appropriate **Grade Set**. Under **Grade Type**, we can select to **attach Grades** or **Grades with Steps**; depending on what we select here will determine the information we will need to enter on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



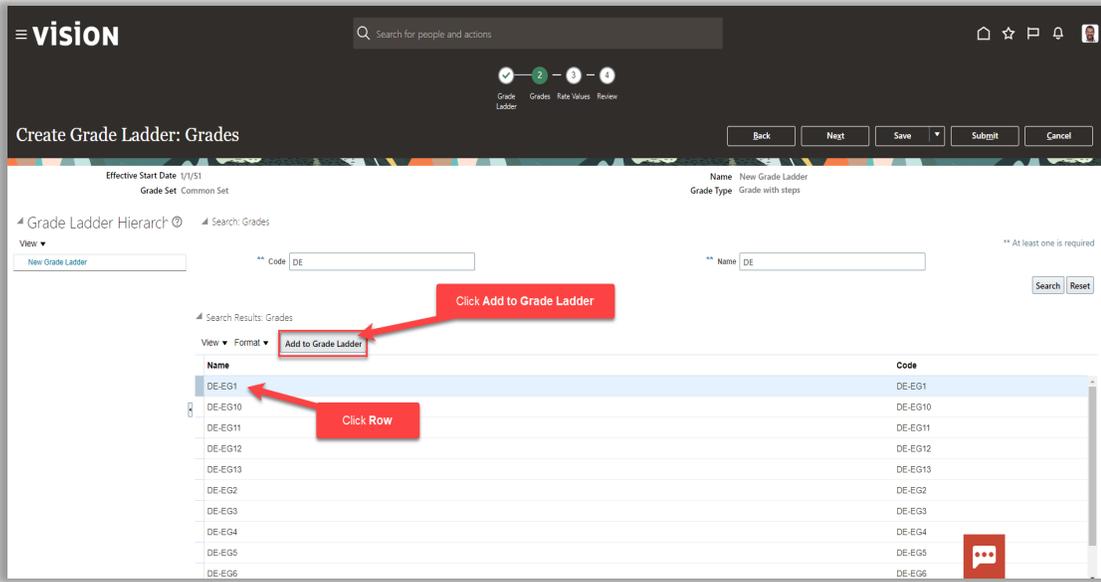
Once the information is entered, click **Next**



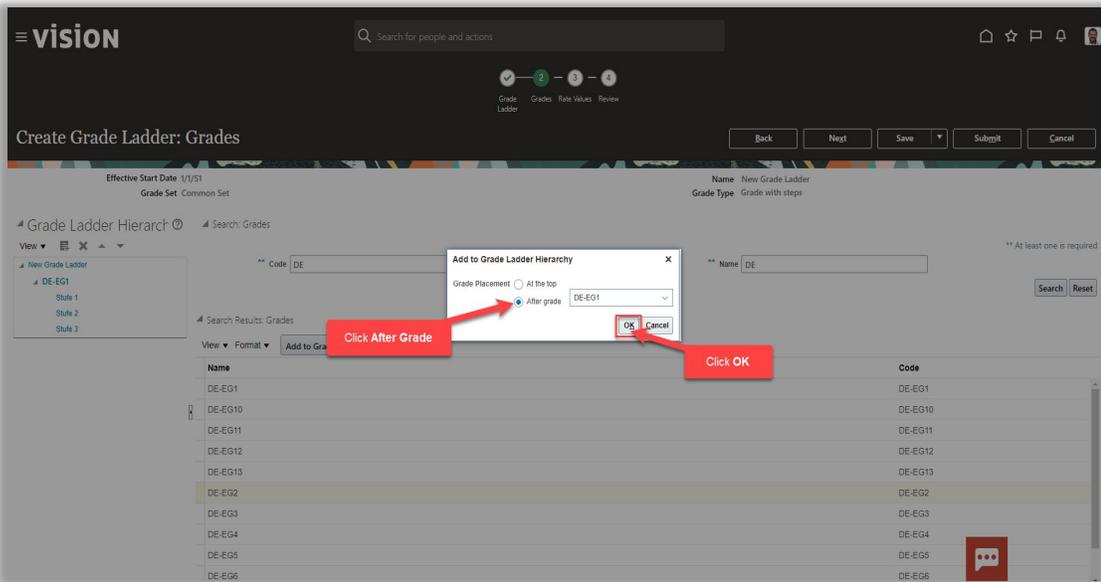
Now we'll enter the grade information. Enter the **Code** and **Name** and click **Search**



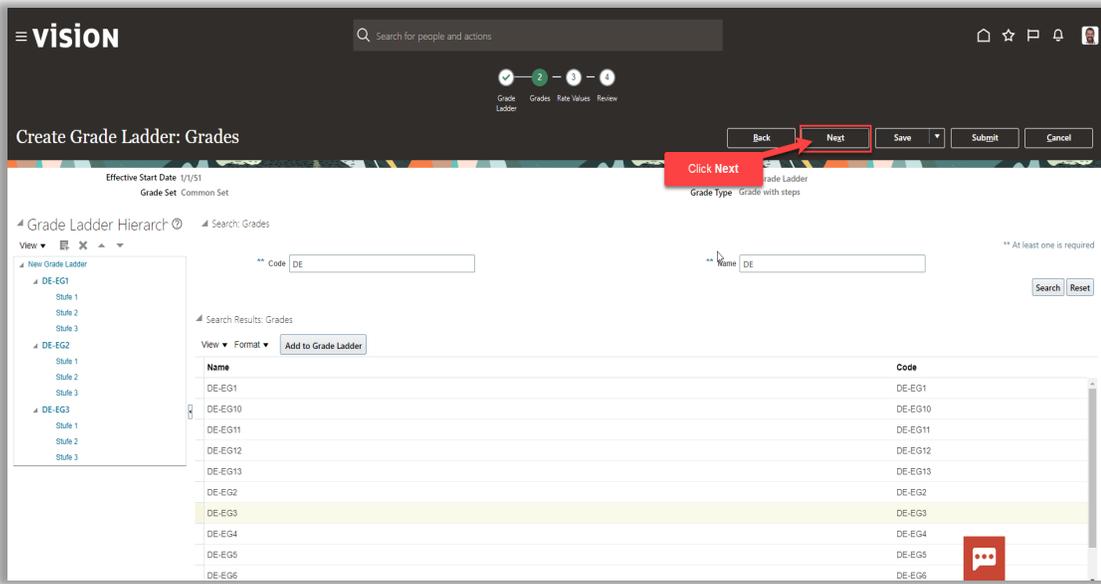
Highlight the row of the **Grade** we wish to add to the Ladder and click **Add to Grade Ladder**. The **Steps** associated to the grades will also be added. We can add multiple Grades to the Ladder



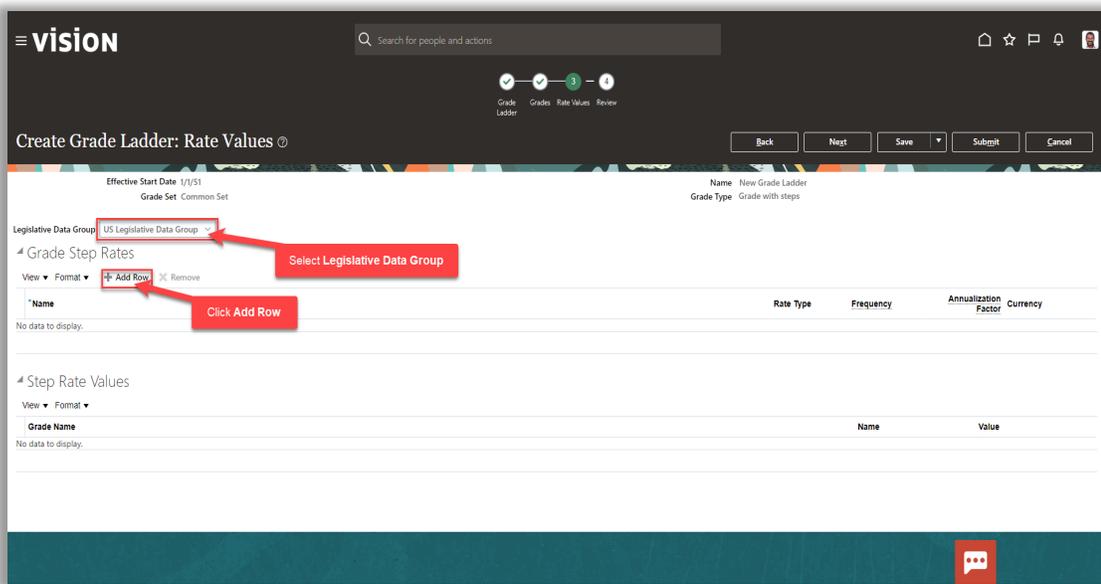
After we add the first Grade, we will be asked where we want to place the second grade. We will select **After Grade 1**. We will follow this process to add additional grades. Click OK



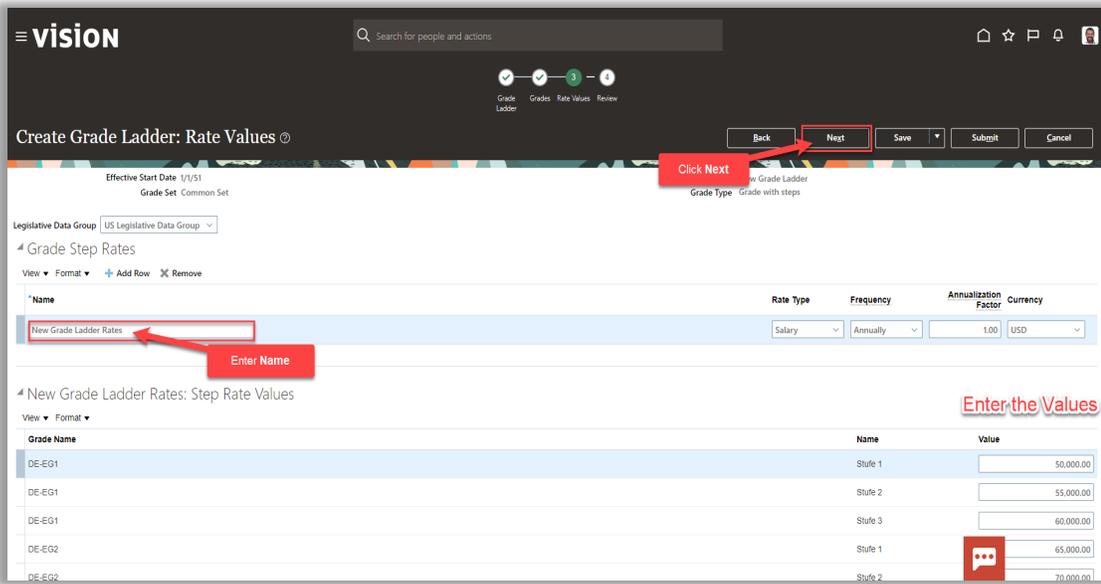
Once all the Grades have been added, click Next



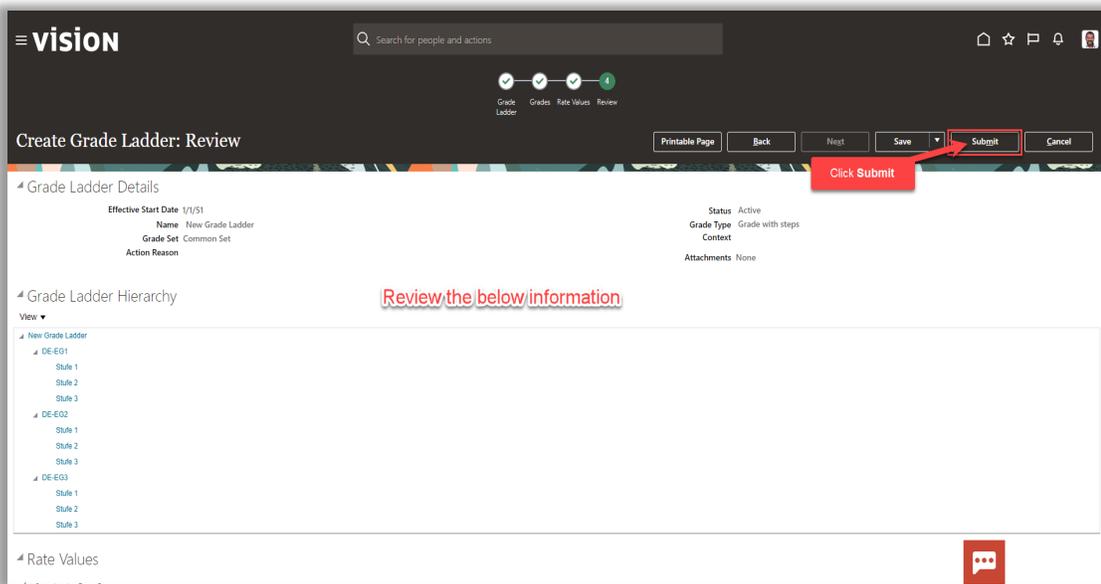
Here we can enter the Grade Step Rates, if applicable. It is recommended we add the Grade Rates through the Manage Grade Rates task prior to the creation of the Ladder but, we can add them here. Select the **Legislative Data Group**. Next, click **Add Row**



Next, enter the **Values** and once complete, click **Next**



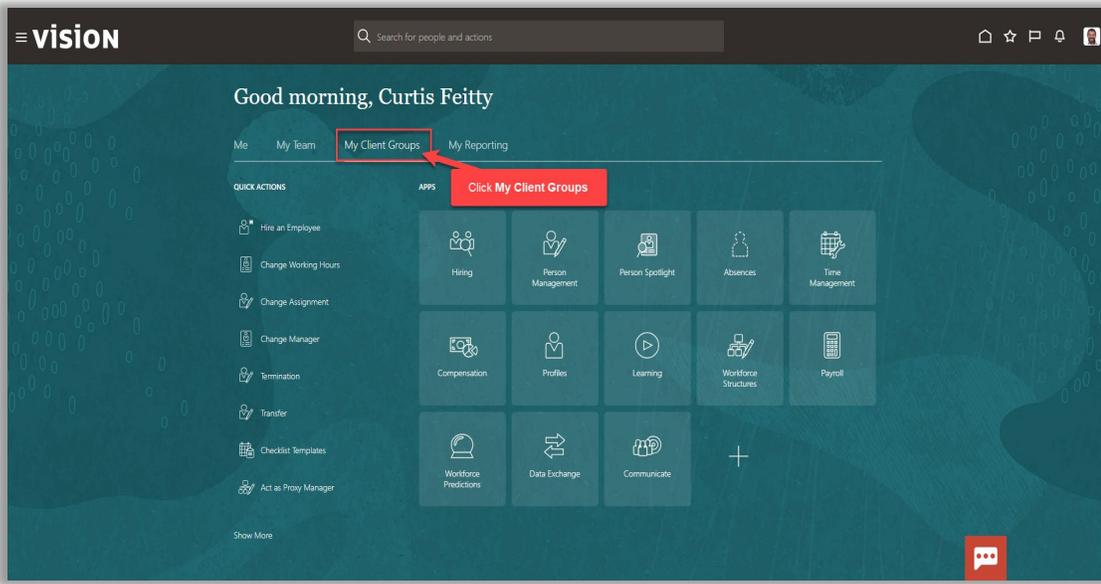
Lastly, we'll review the Ladder information and once our review is complete, click **Submit**



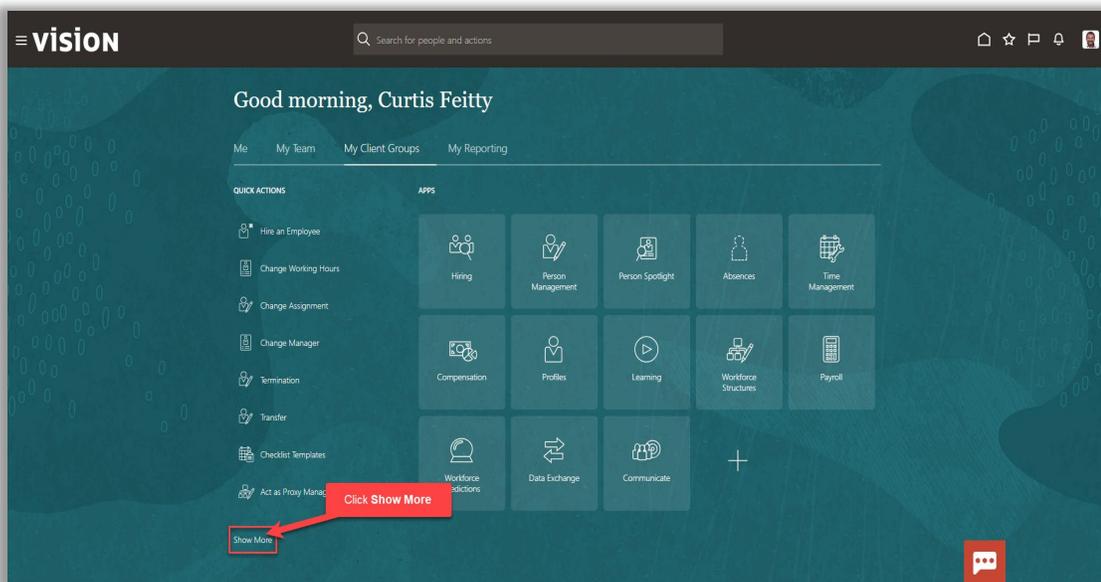
Manage Grade Ladders

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

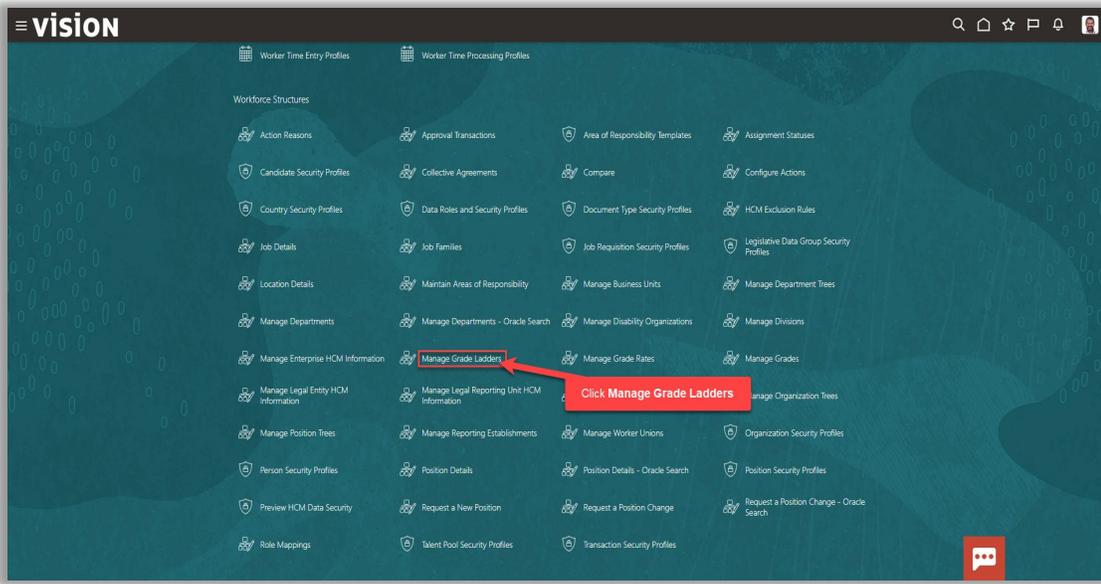
From the home screen, click **My Client Groups**



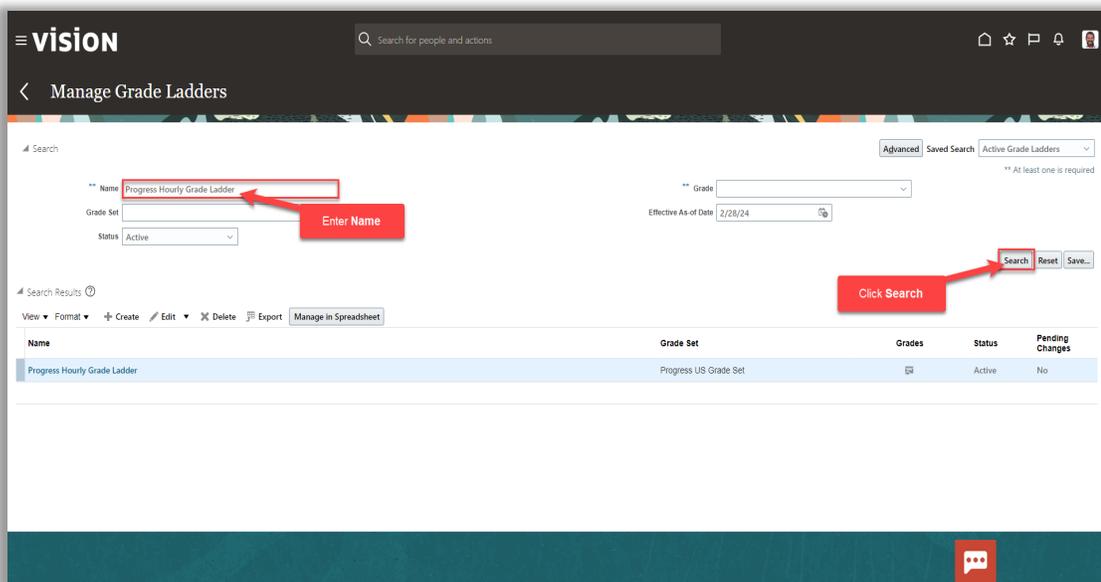
Next, click **Show More**



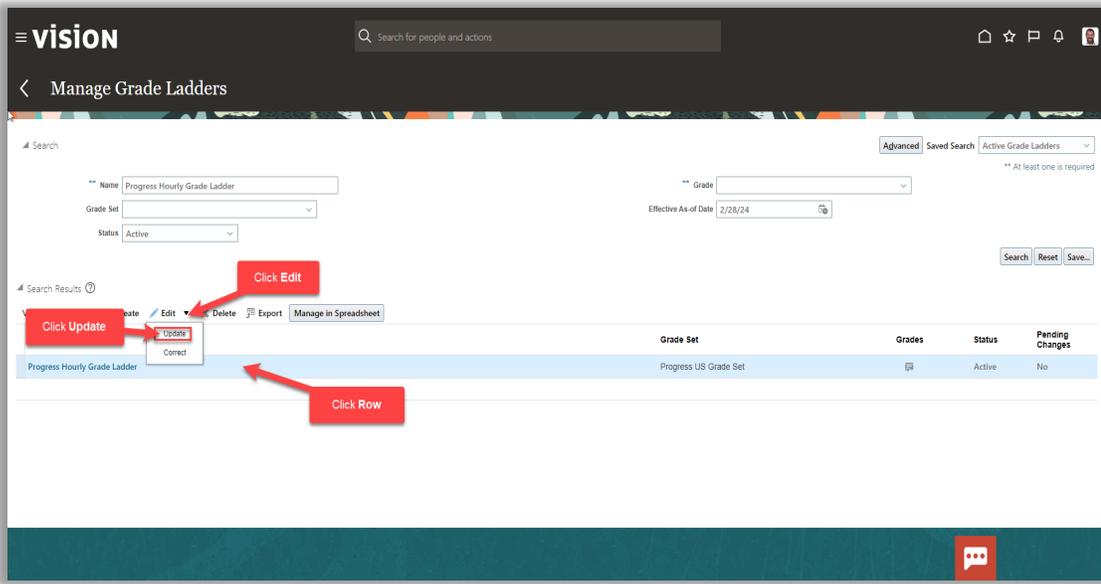
Scroll down and under **Workforce Structures**, click **Manage Grade Ladders**. As a note, we can search **Manage Grade Ladders** by clicking Ctrl F



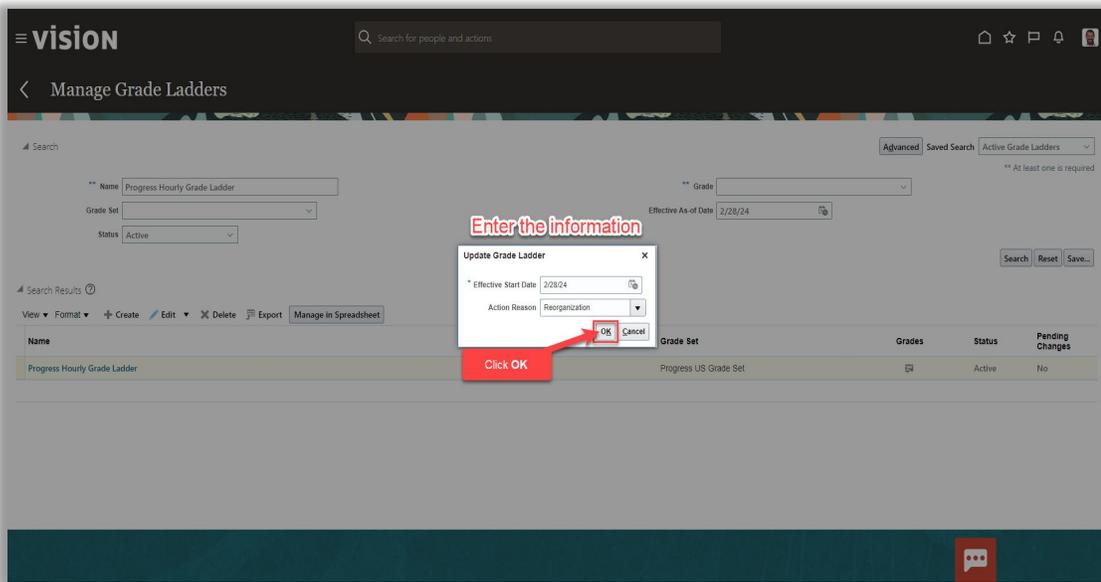
Next, Enter the Grade Ladder Name and click **Search**



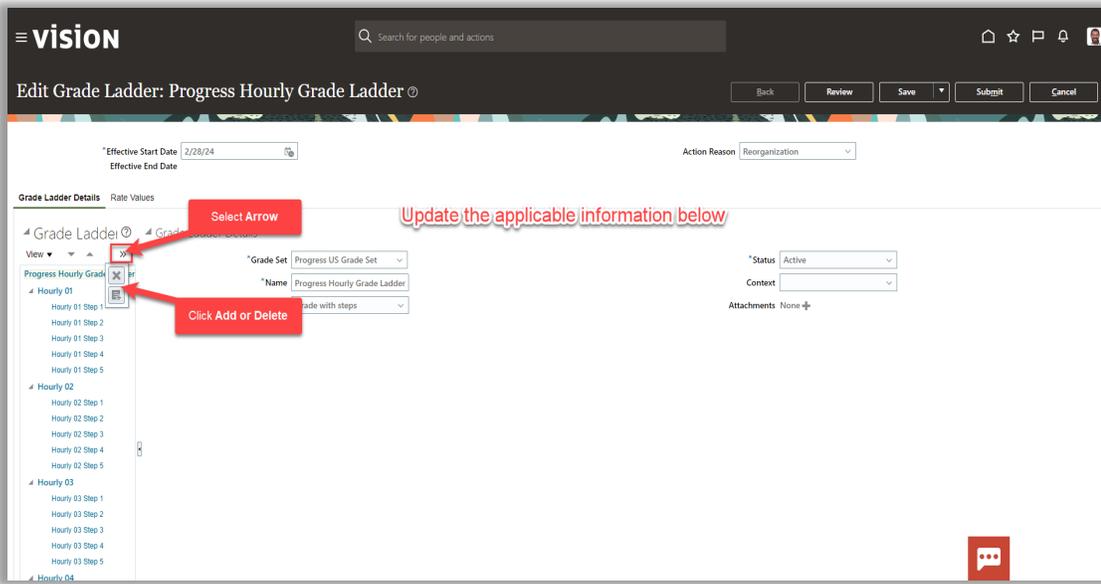
Highlight the row of the **Grade Ladder** and click **Edit**, then **Update**. As a note, we can click Correct if we are correcting data that was entered in error, otherwise, we'll click Update



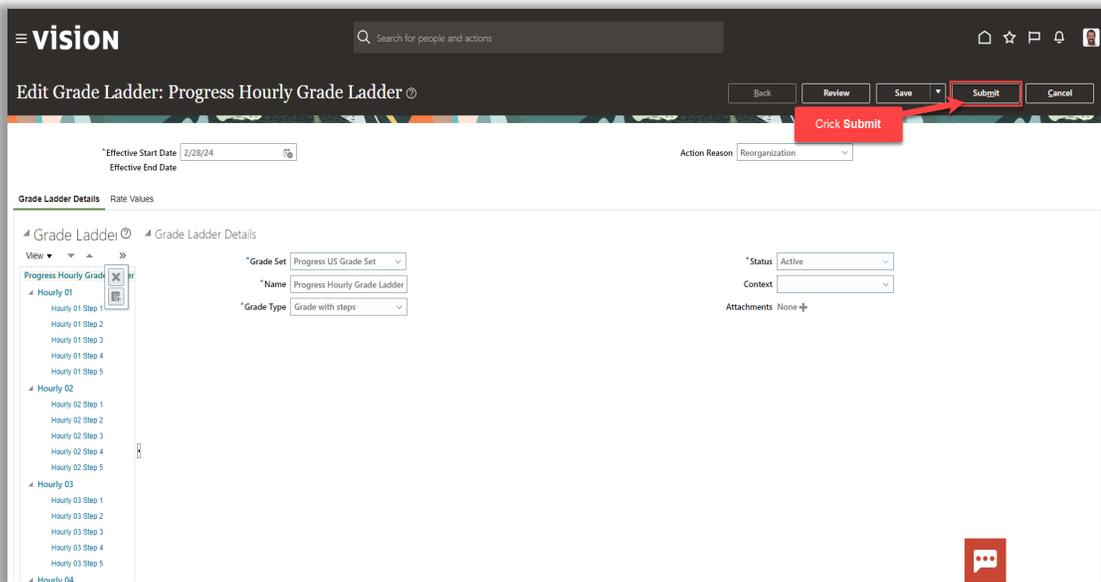
Enter the **Effective Start Date**, **Action Reason**, if applicable, then click **OK**



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



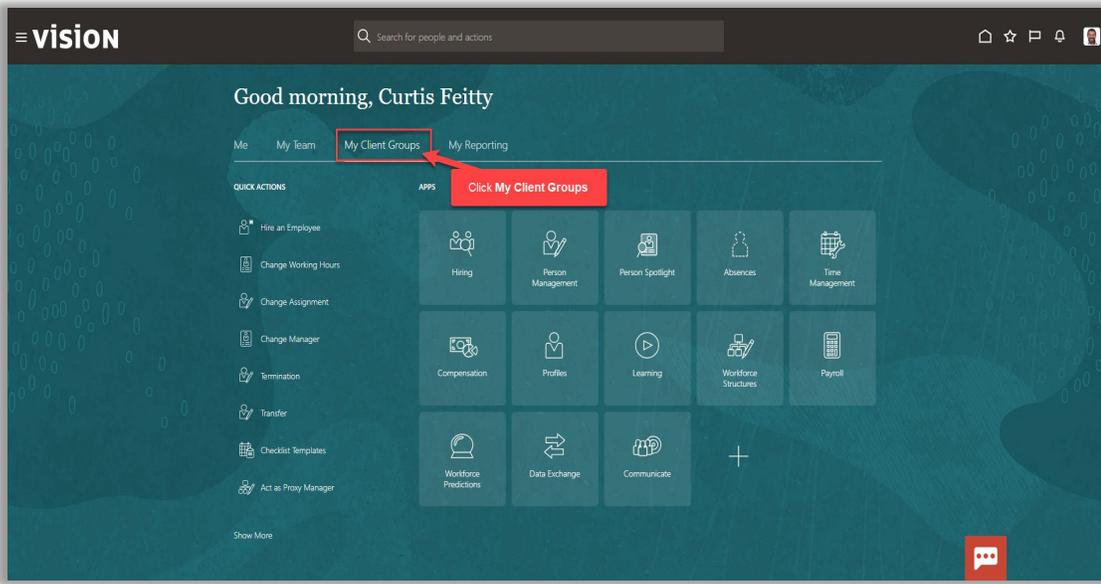
Once our updates are complete, click **Submit**



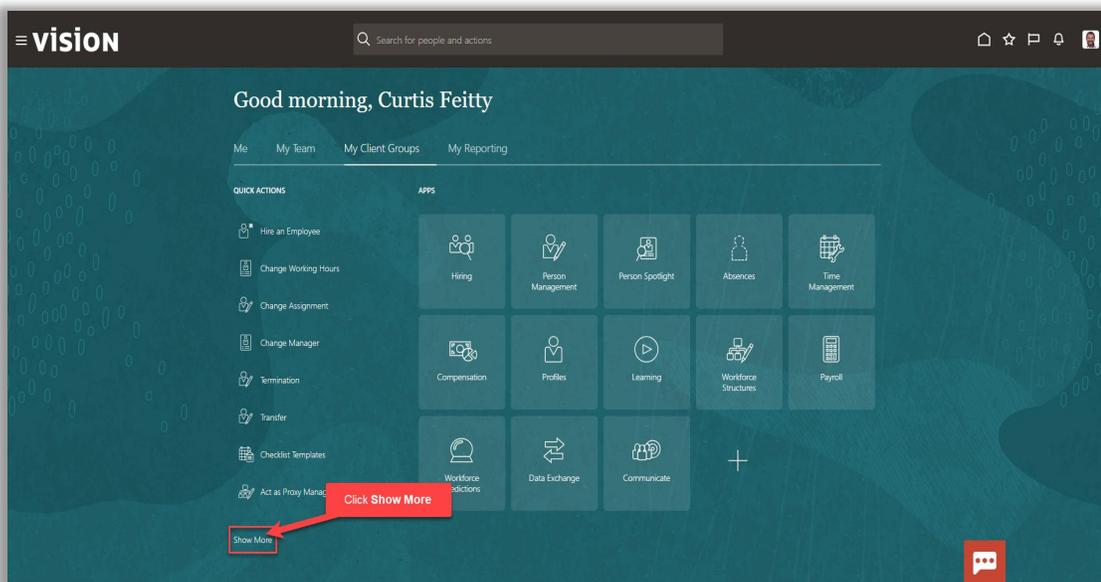
Create An Area of Responsibility Template

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

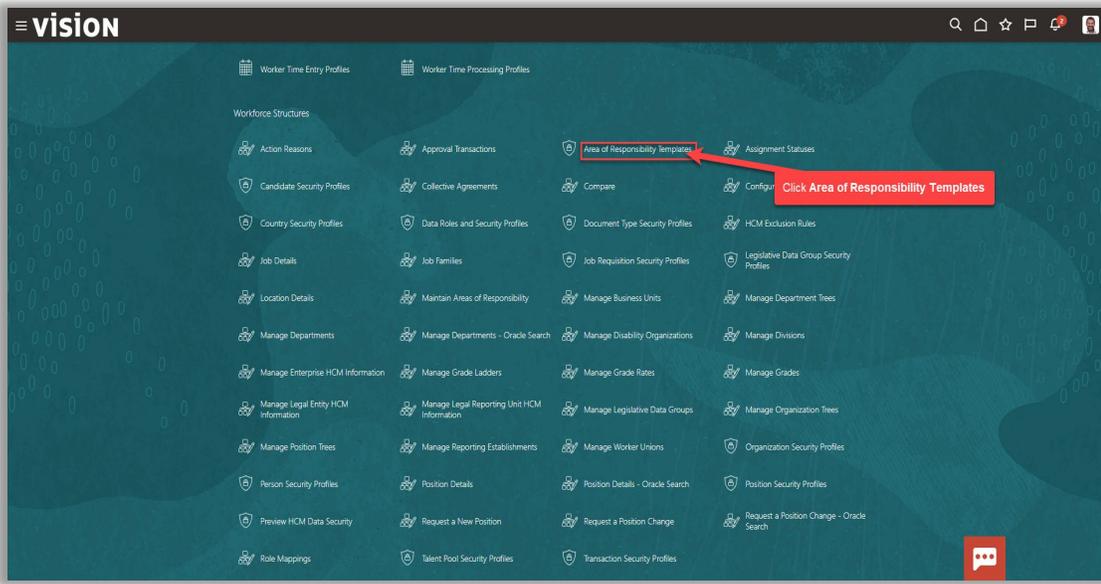
From the home screen, click **My Client Groups**



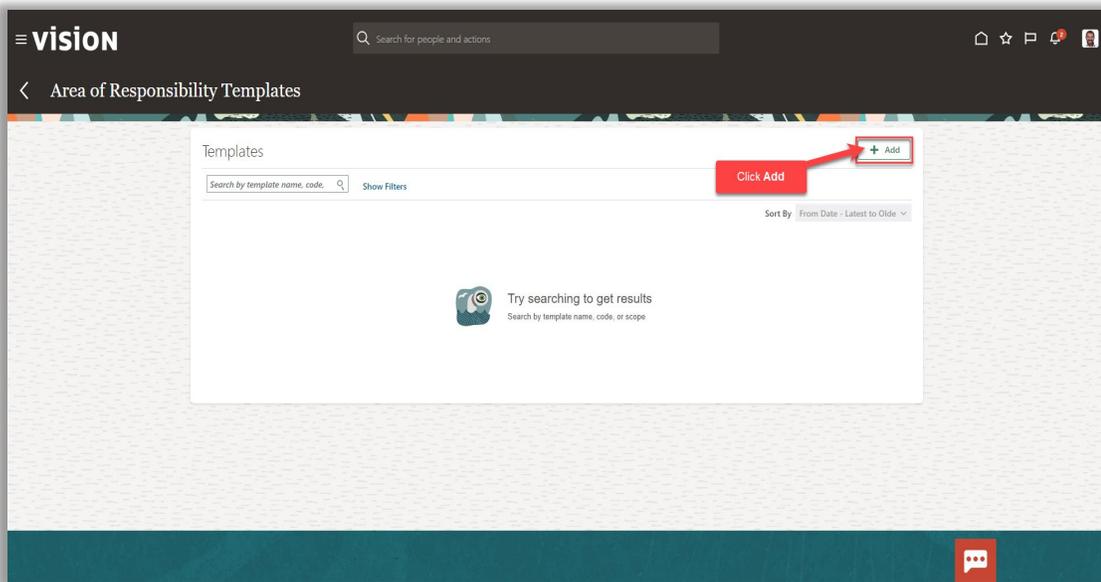
Next, click **Show More**



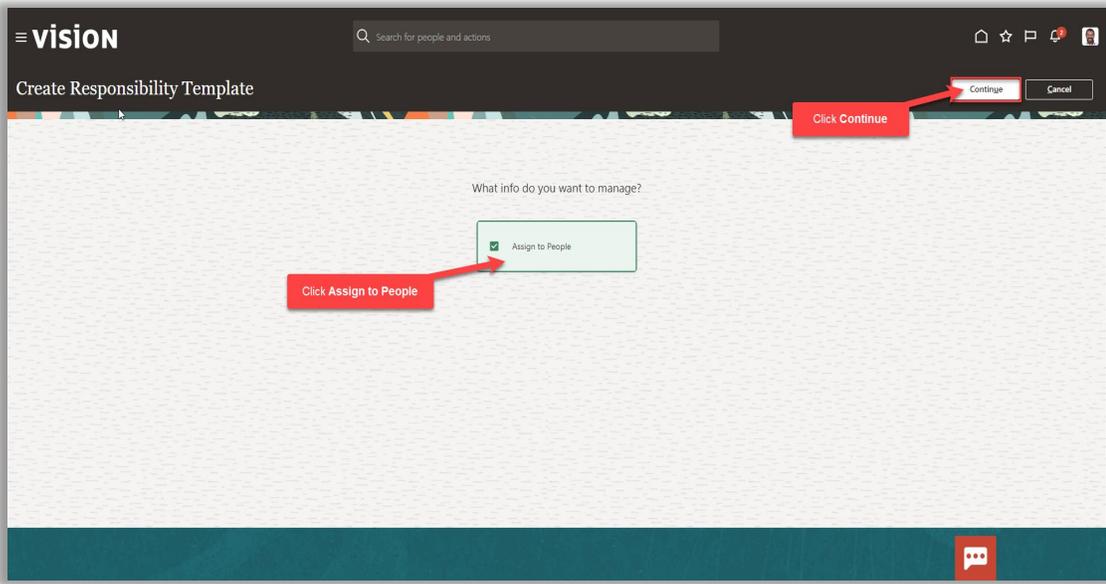
Scroll down and under **Workforce Structures**, click **Area of Responsibility Templates**. As a note, we can search **Area of Responsibility Templates** by clicking Ctrl F



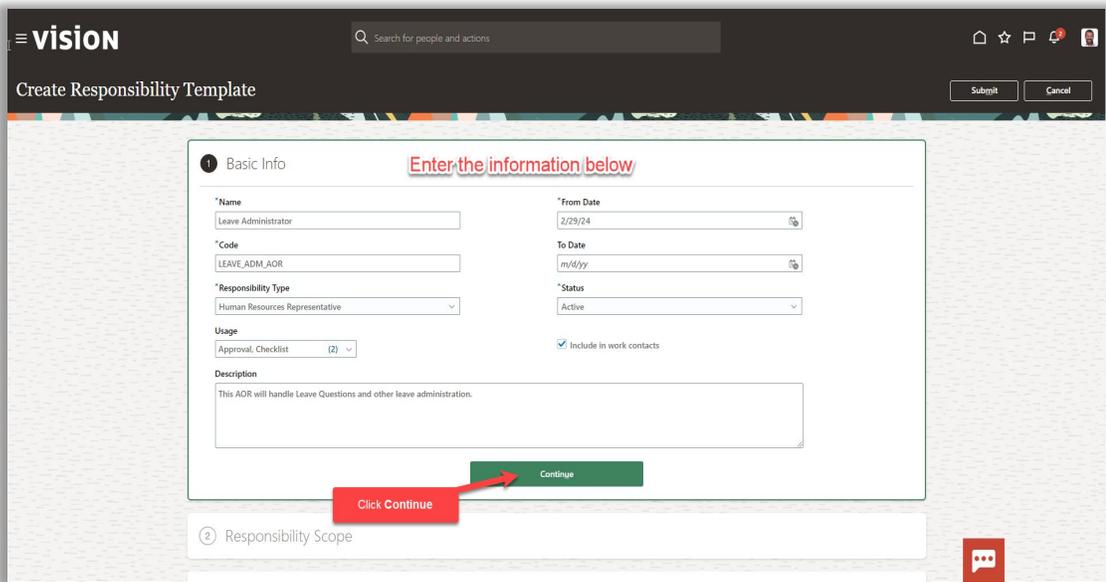
Next, click **Add**



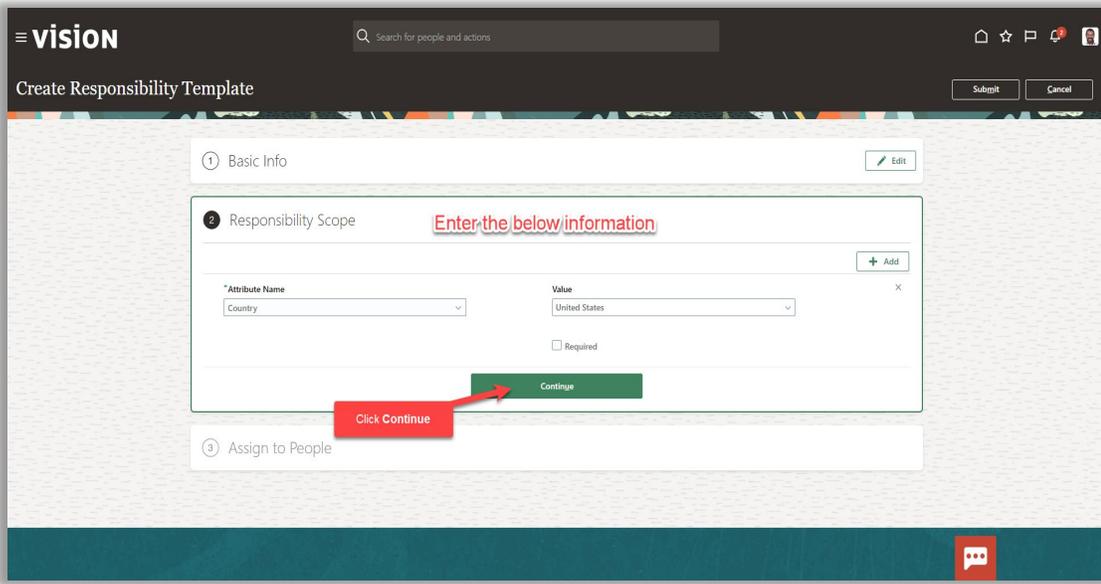
Click **Assign to People** and click **Continue**



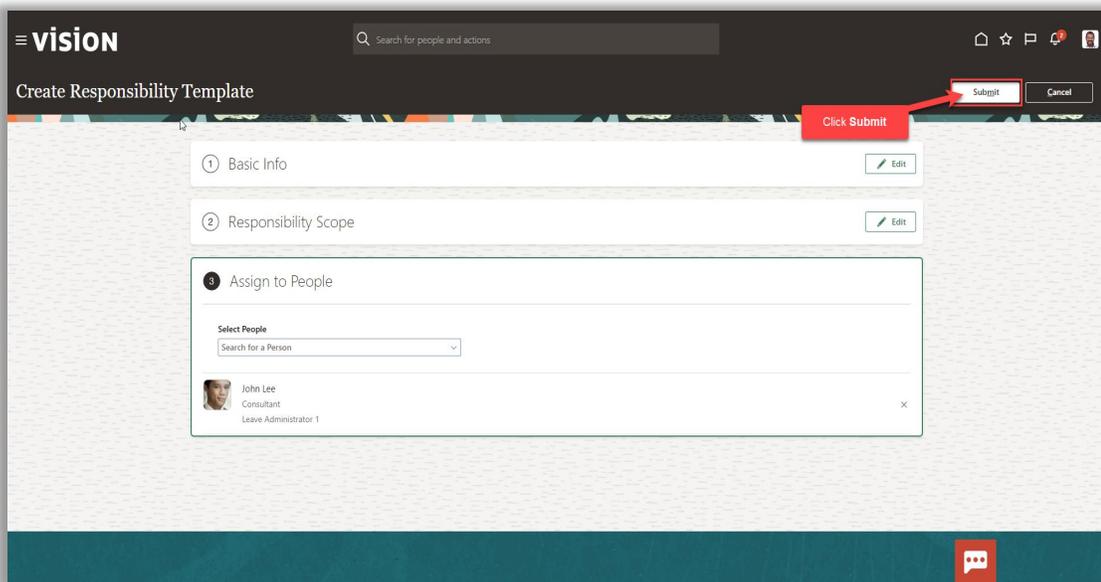
Enter the **Basic Info** and click **Continue**



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

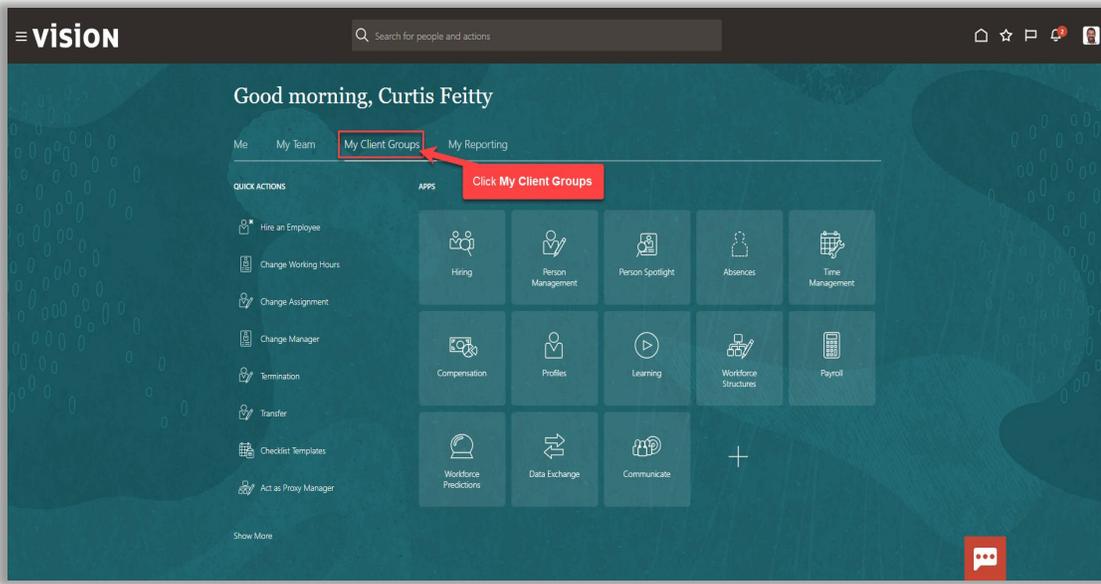


Employee Management

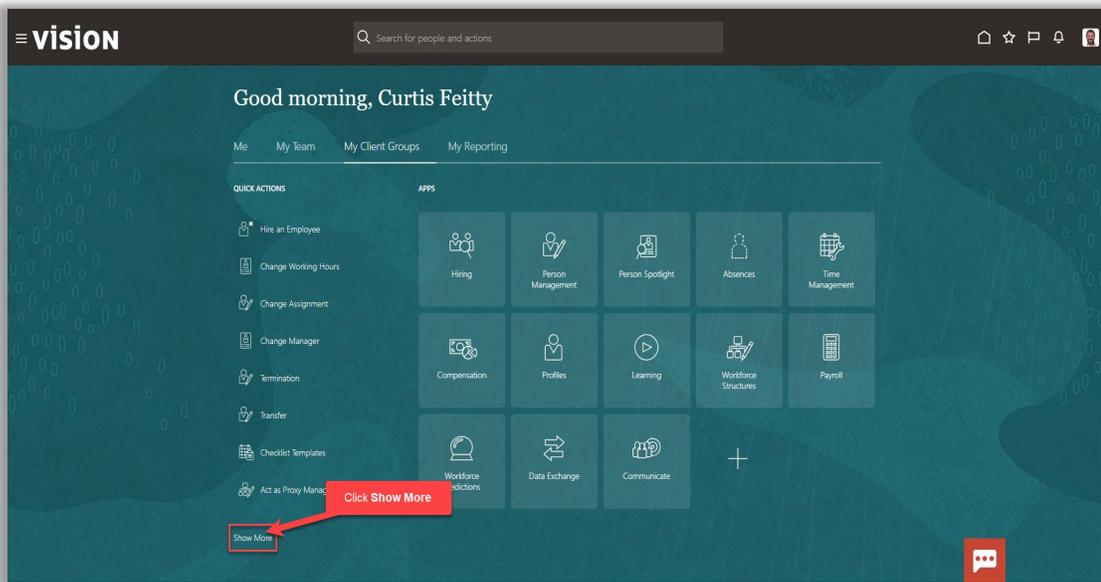
Add A Pending Worker

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

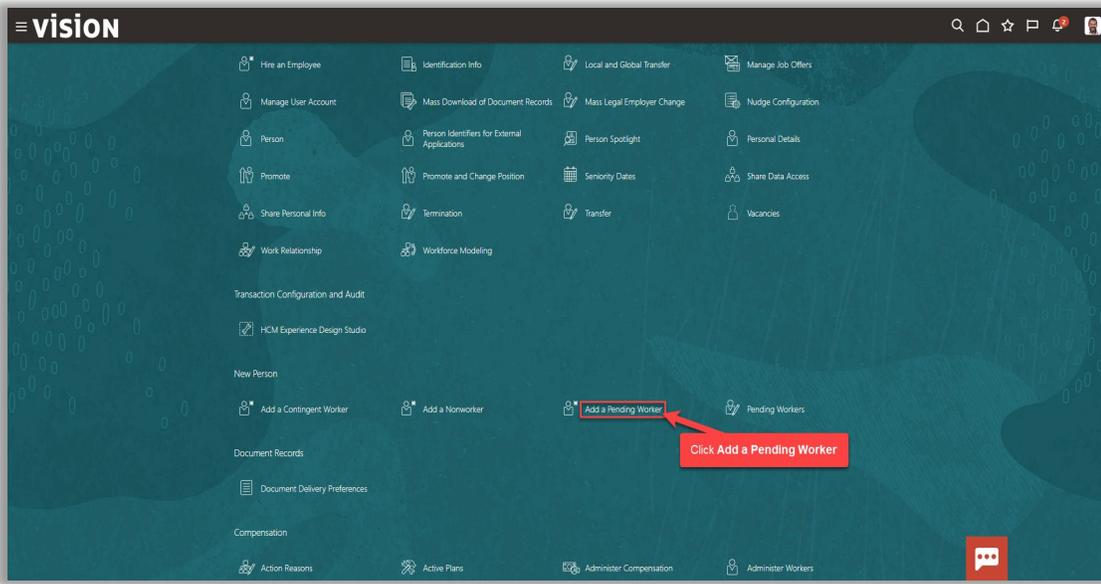
From the home screen, click **My Client Groups**



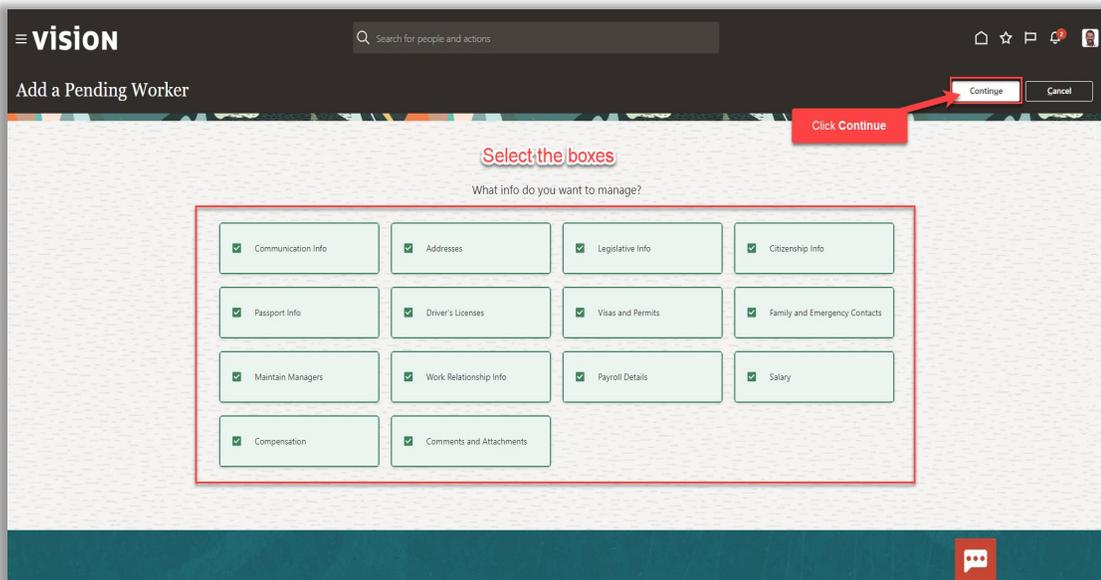
Next, click **Show More**



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



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**



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

vision Search for people and actions

Add a Pending Worker

Submit Cancel

1 When and Why **Enter the below information**

*When is the pending worker start date? 1/12/24

*Legal Employer US1 Legal Entity

*Proposed Worker Type Employee

*What's the way to add the pending worker? Add Pending Worker

Why are you adding a pending worker? Future hire to fill vacant position

Continue

Click Continue

2 Personal Details

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.

Add a Pending Worker

Submit Cancel

14 Payroll Details

Click Submit

15 Salary Edit

16 Compensation Edit

17 Comments and Attachments

Comments

Attachments

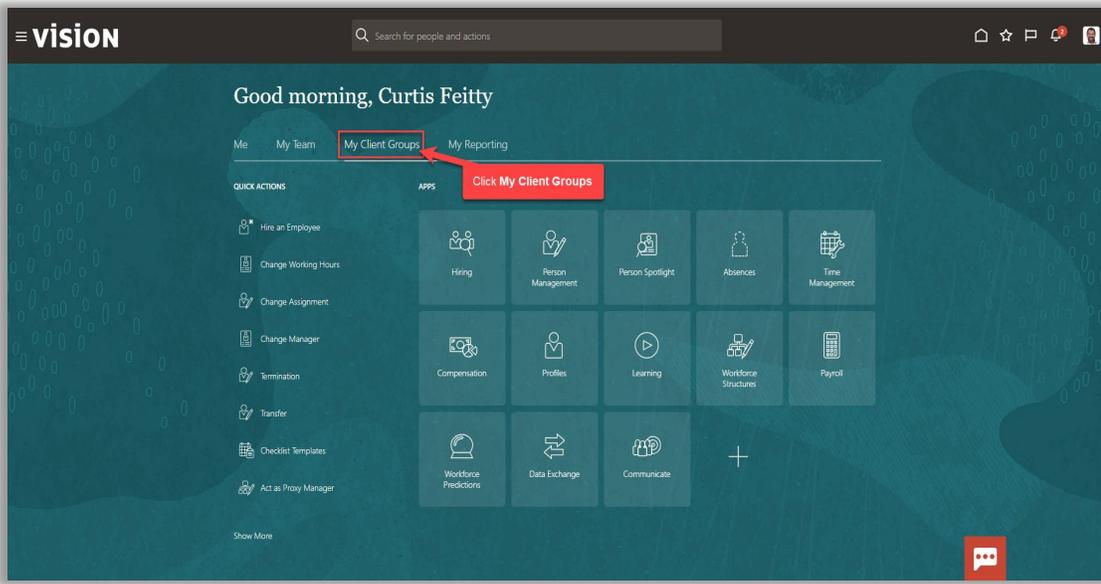
Drag files here or click to add attachment

Click Submit

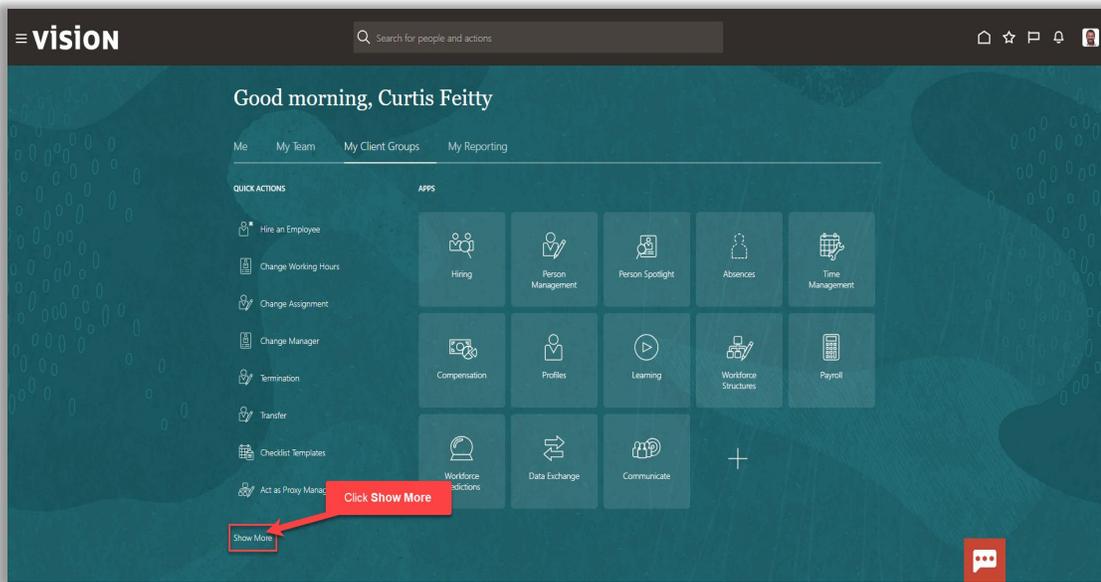
Convert Pending Workers

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

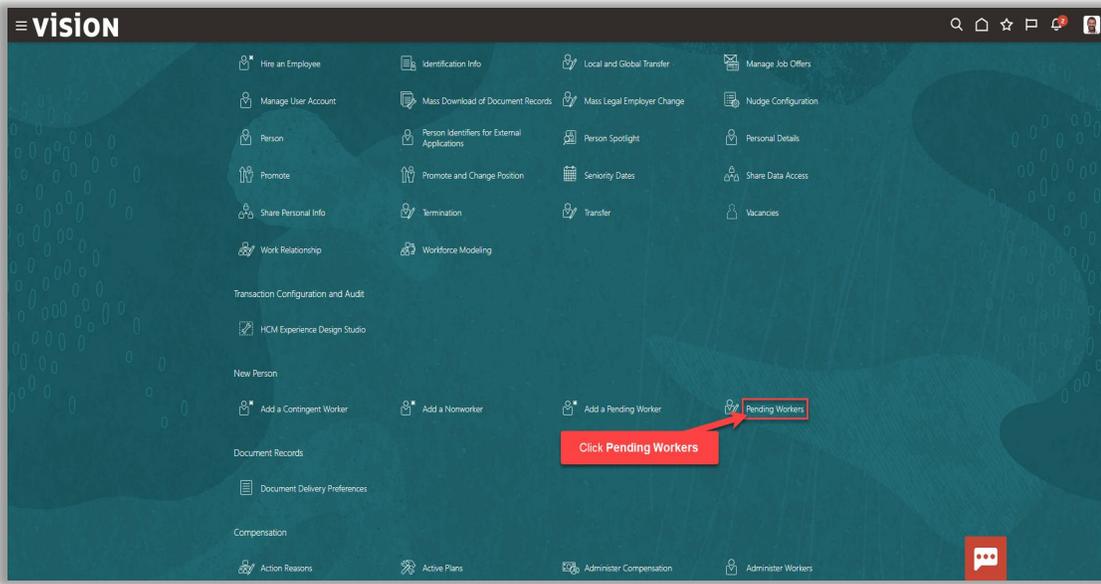
From the home screen, click **My Client Groups**



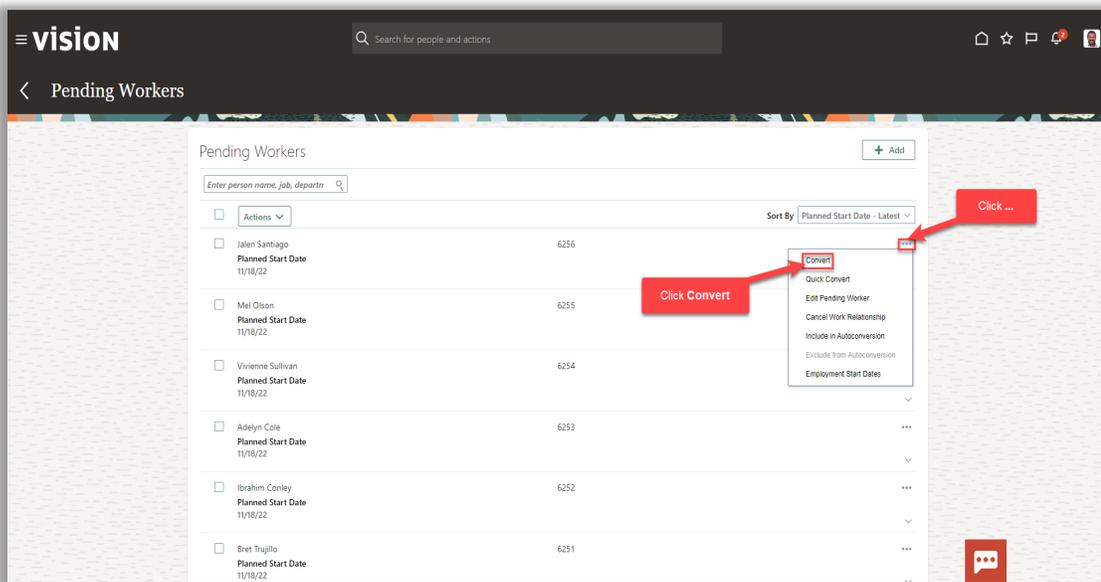
Next, click **Show More**



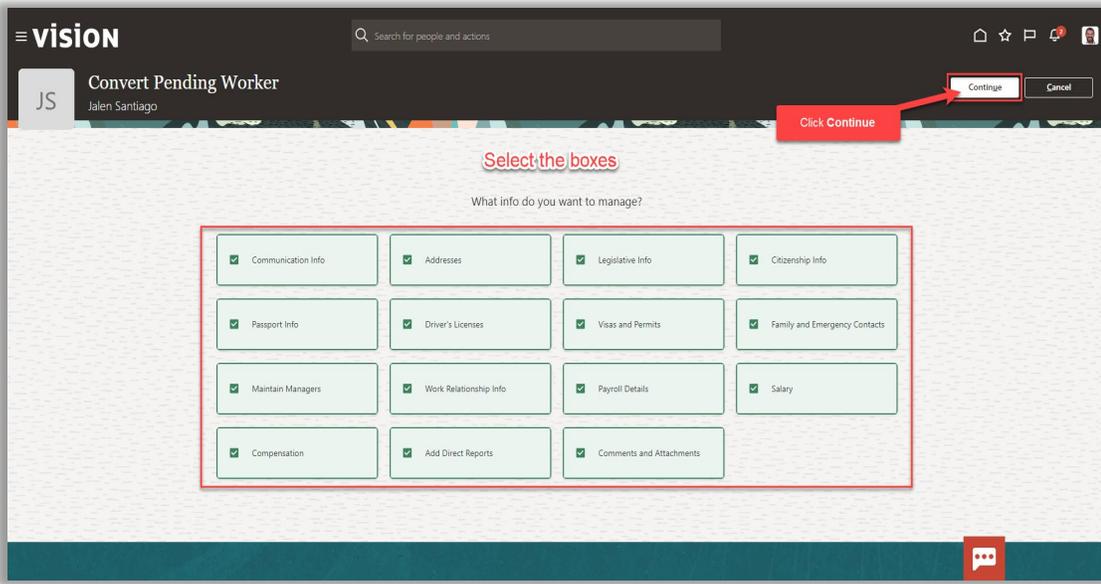
Scroll down and under **New Person**, click **Pending Workers**. As a note, we can search **Pending Workers** by clicking Ctrl F



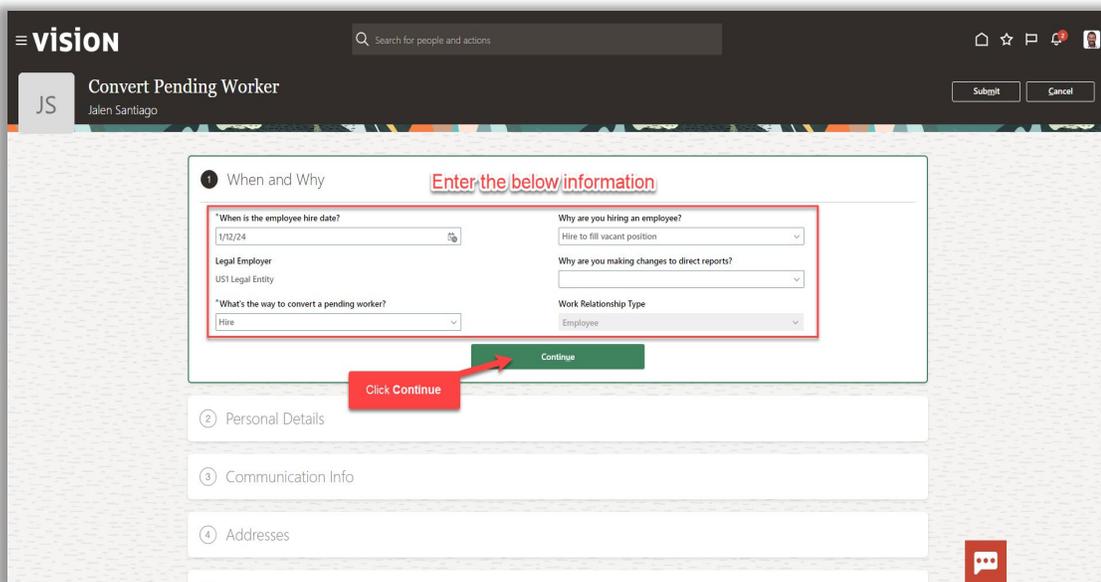
From the **Pending Workers** screen, select the three dots (...) across from the pending workers name we wish to convert and click **Convert**. By clicking **Convert** instead of **Quick Convert**, we will have the opportunity to update the employee's details. If we click **Quick Convert**, the employee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



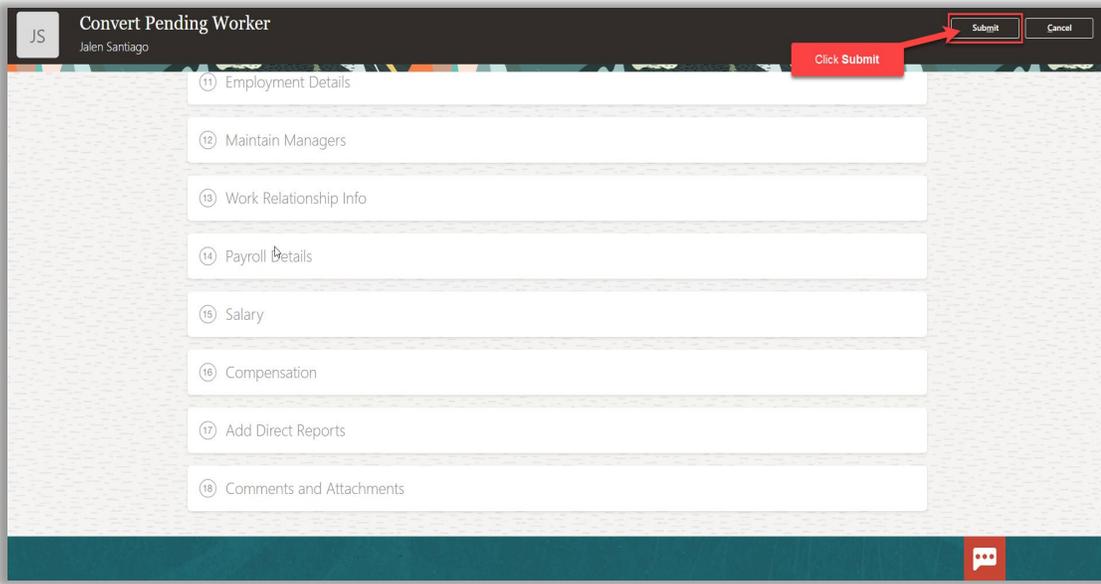
From the **Convert Pending Worker** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**



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



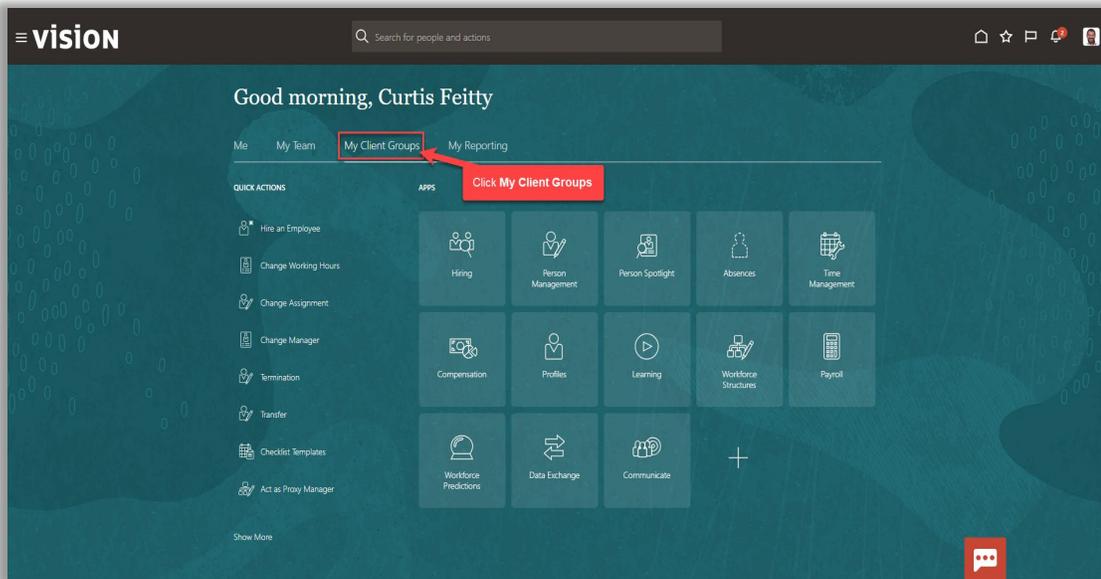
Follow this same process and complete the information in each section. The information needed in each section will depend on wer configurations. We can also edit the information in each section by clicking **the pencil icon**. We can add information by clicking **Add**. Once we have added the information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



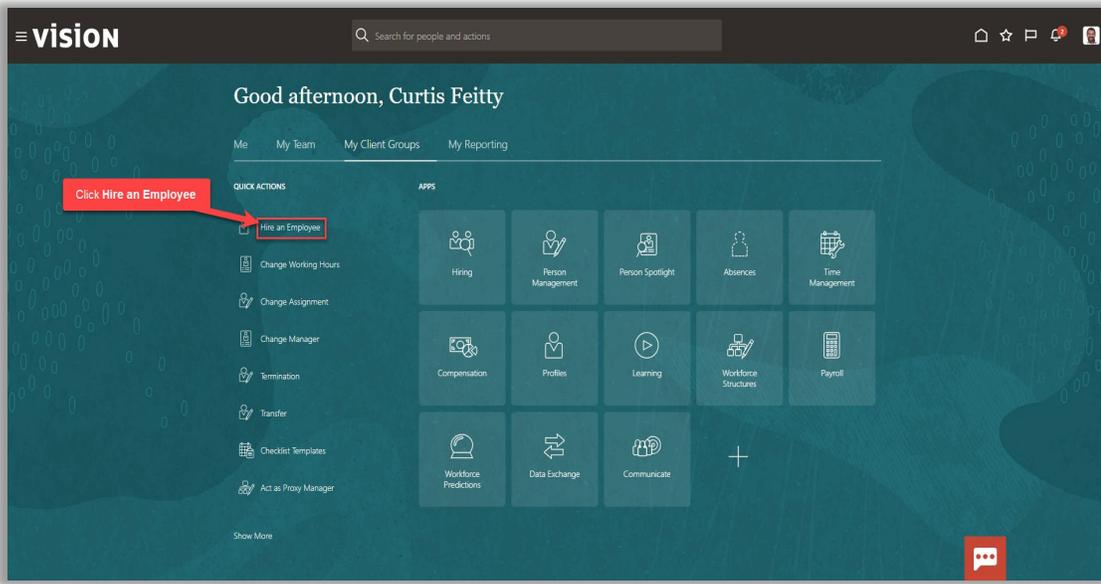
Hire An Employee

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

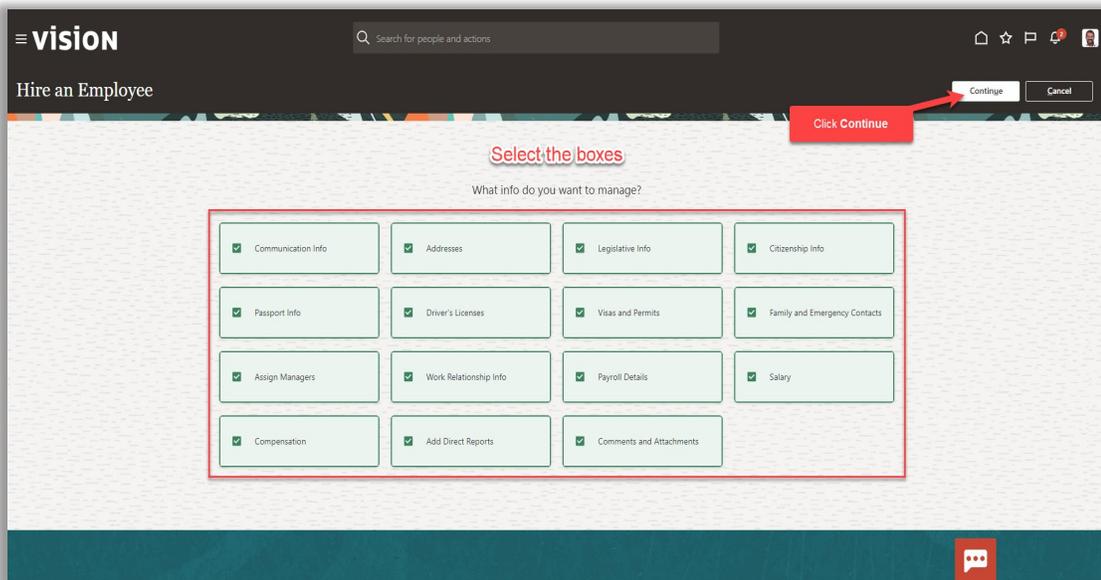
From the home screen, click **My Client Groups**



Next, from the Quick Actions click **Hire an Employee**



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**



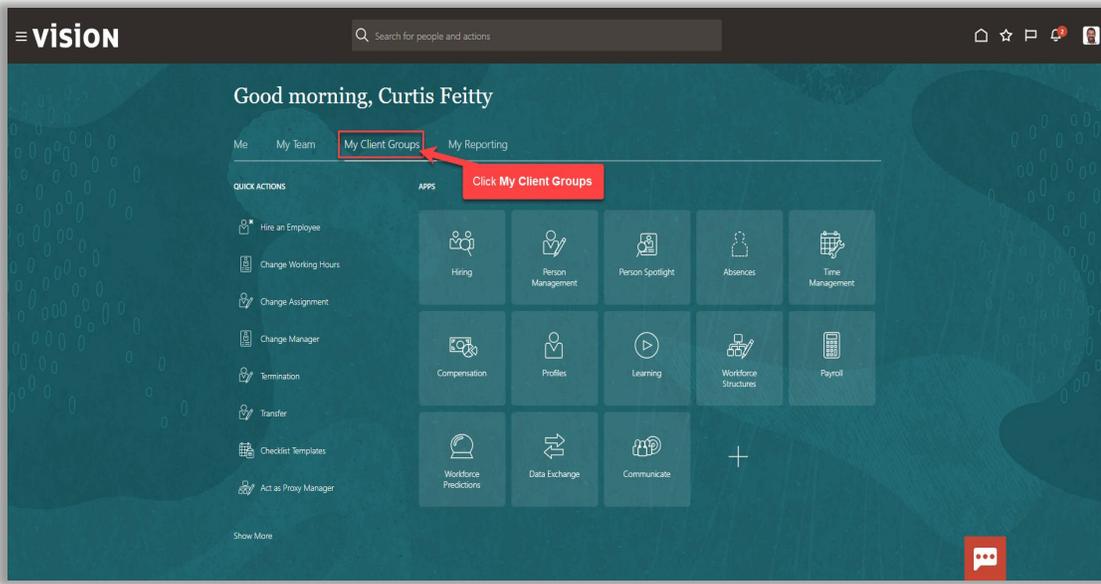
Enter the information in the **When and Why** section, then click **Continue**

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.

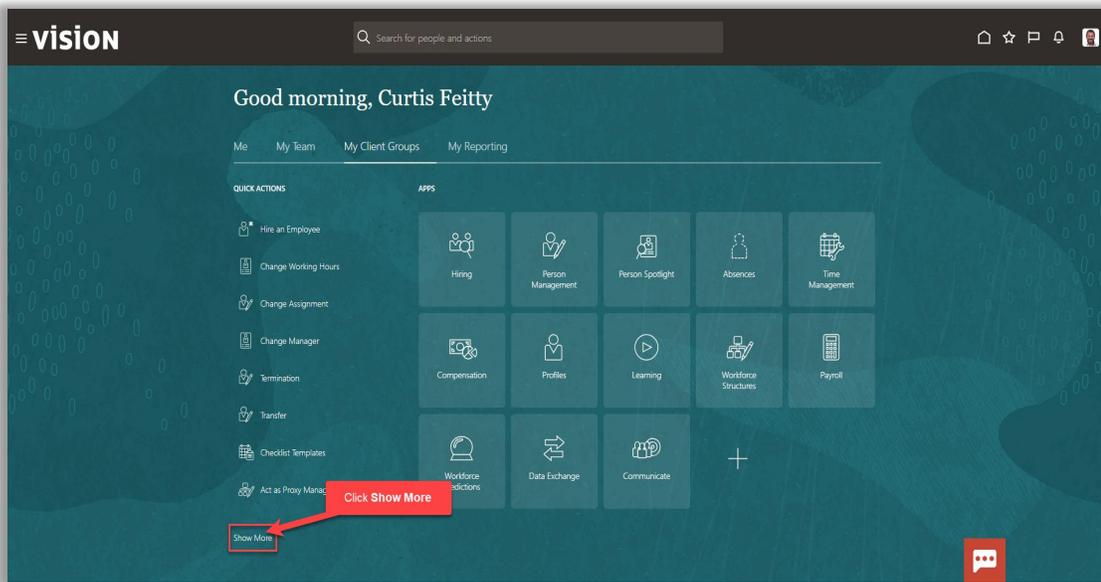
Correct The Hire Date of An Employee

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

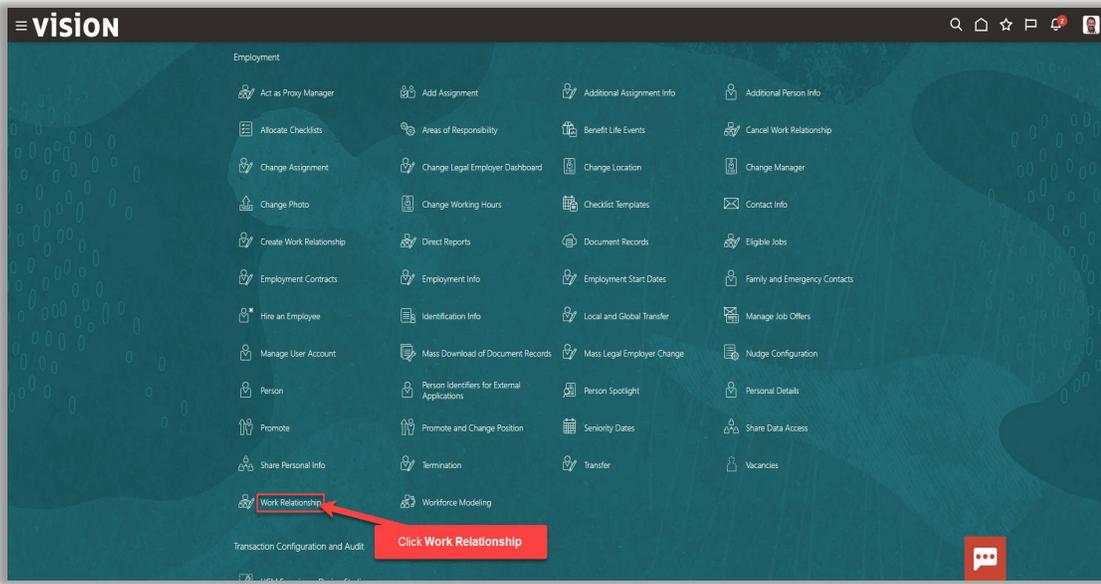
From the home screen, click **My Client Groups**



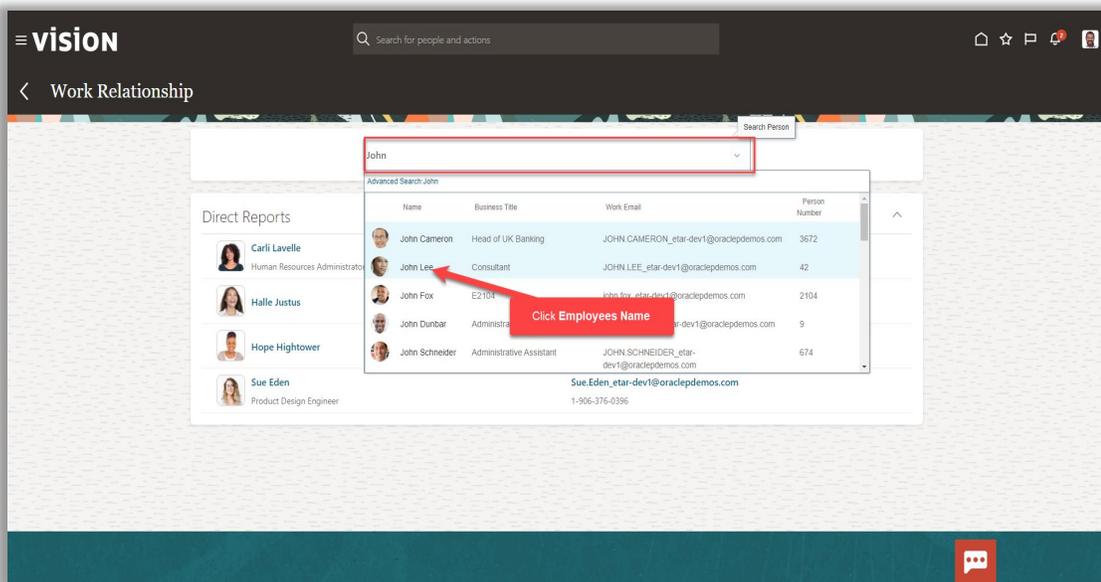
Next, click **Show More**



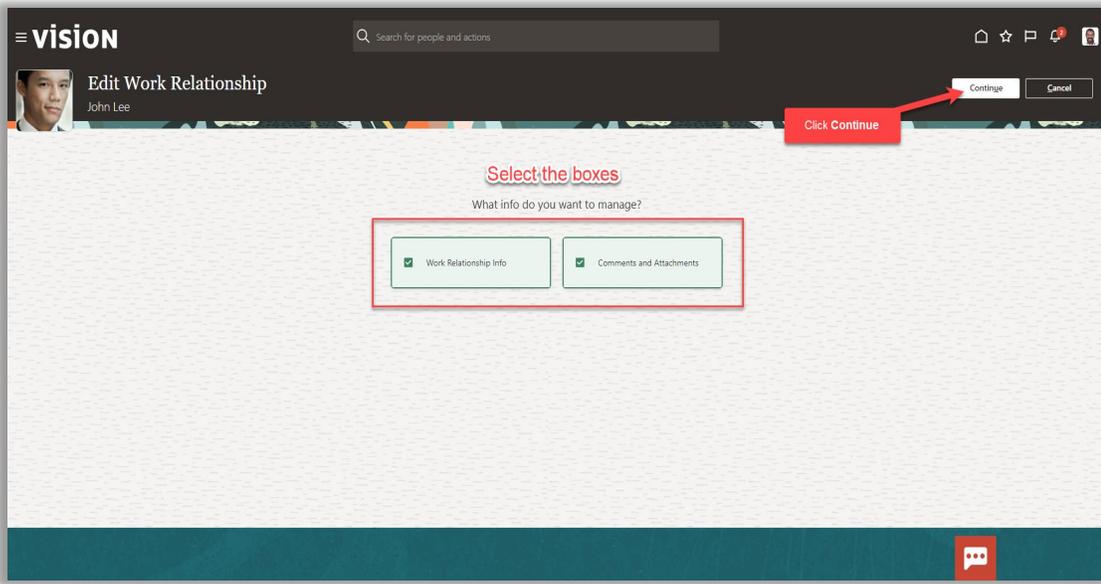
Scroll down and under **Employment**, click **Work Relationship**. As a note, we can search **Work Relationship** by clicking Ctrl F



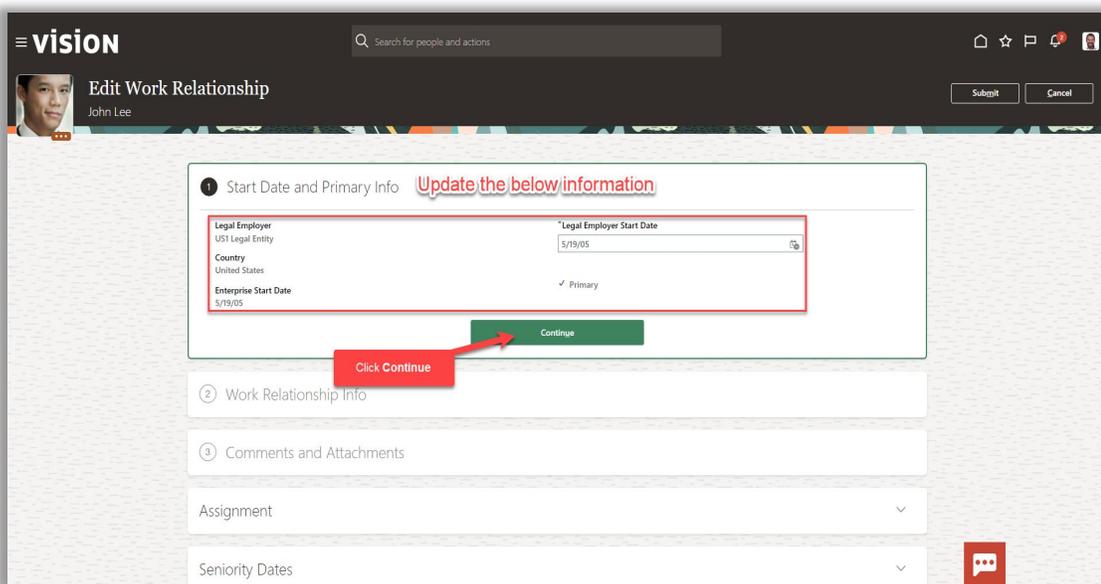
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



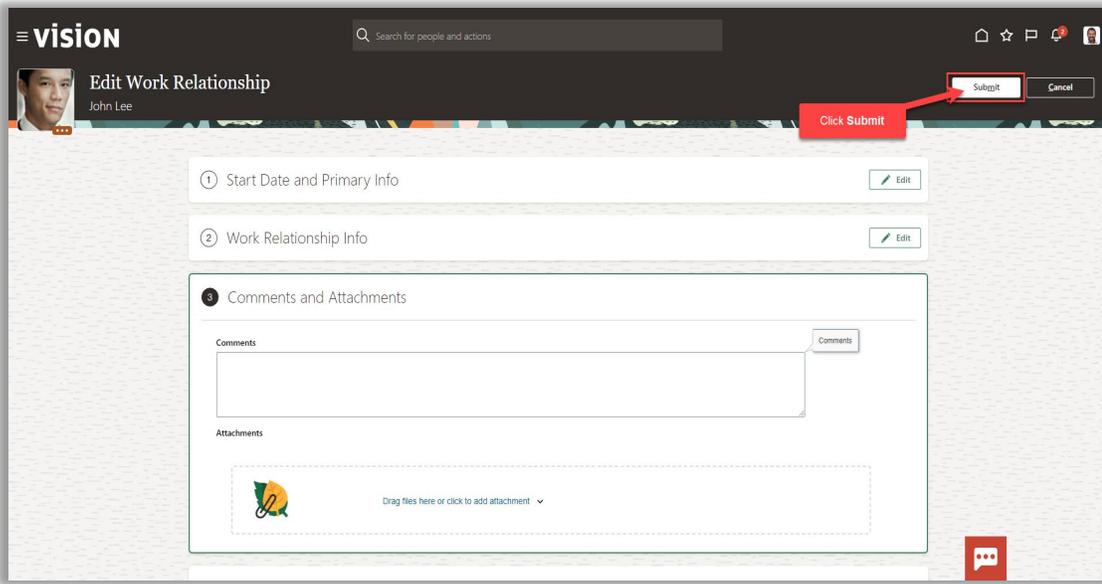
From the **Edit Work Relationship** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**



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**.



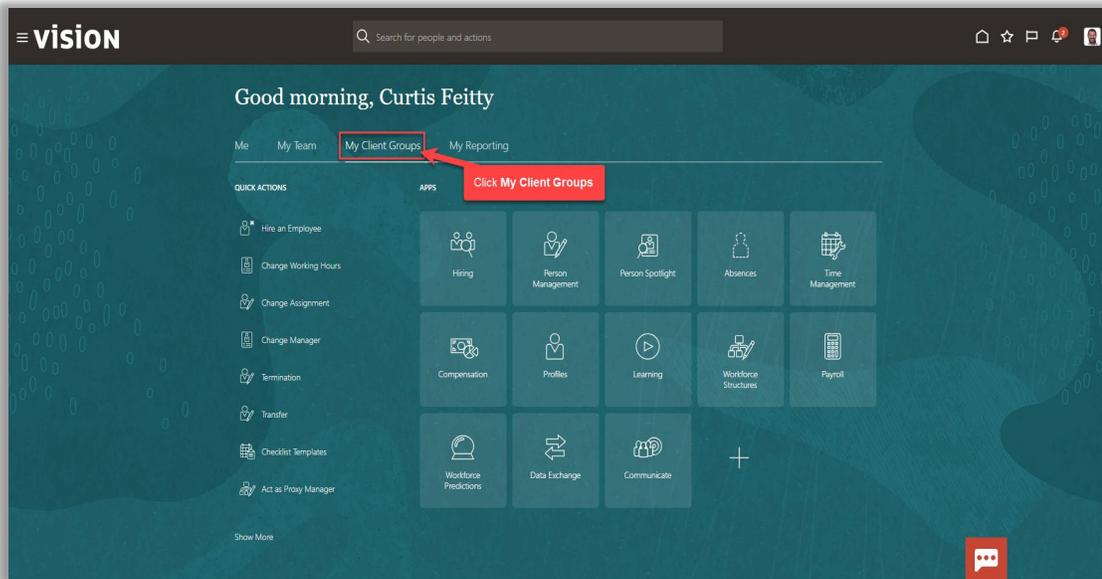
Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The hire date for this employee has been updated.



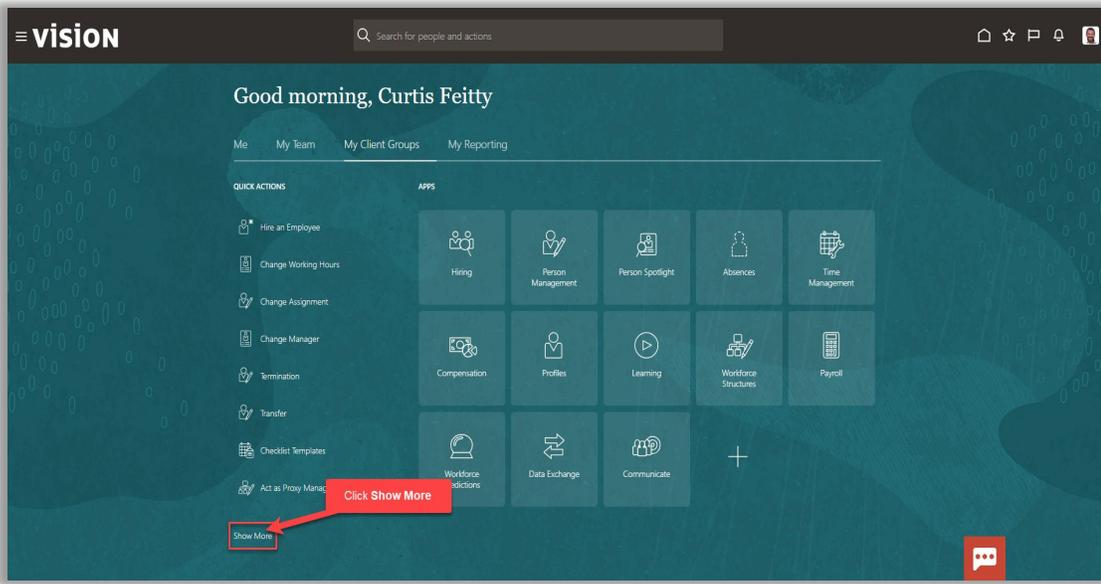
Promote An Employee

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

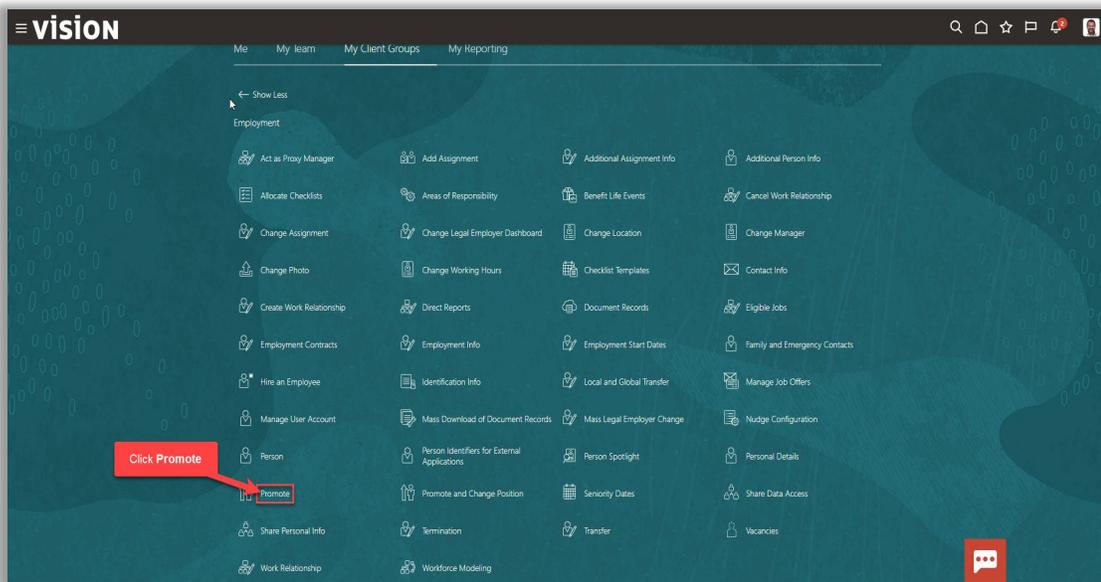
From the home screen, click **My Client Groups**



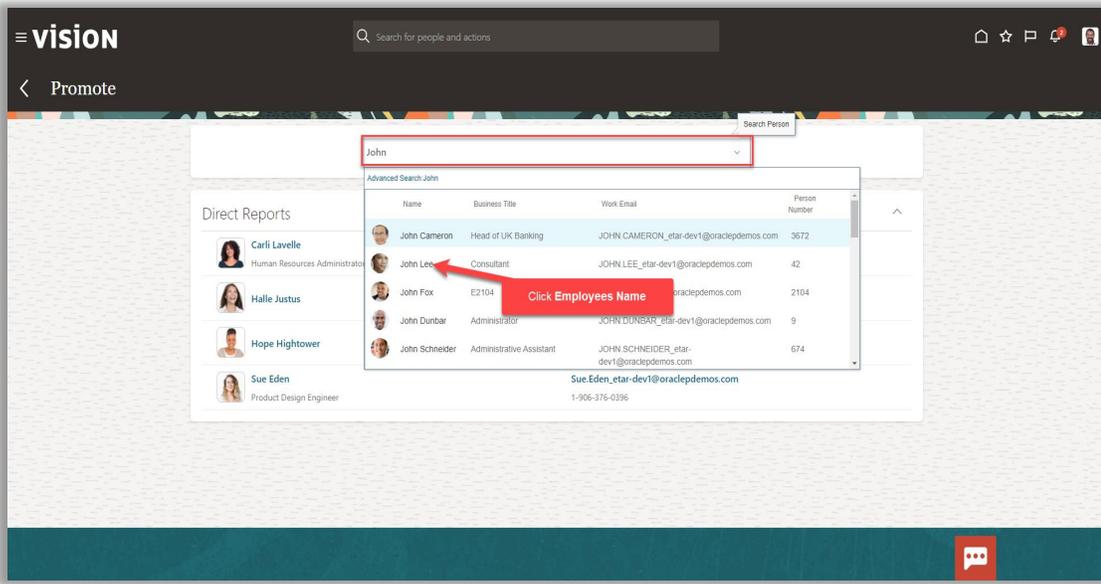
Next, click **Show More**



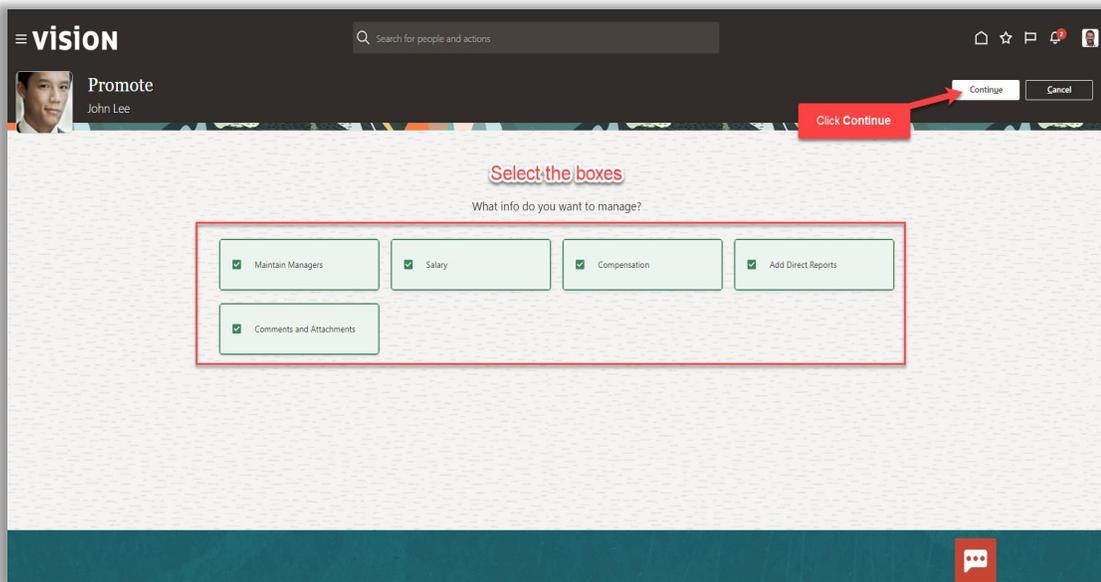
Scroll down and under **Employment**, click **Promote**. As a note, we can search **Promote** by clicking Ctrl F. Alternatively, we can click **Promote and Change Position** if the promotion would include a position change



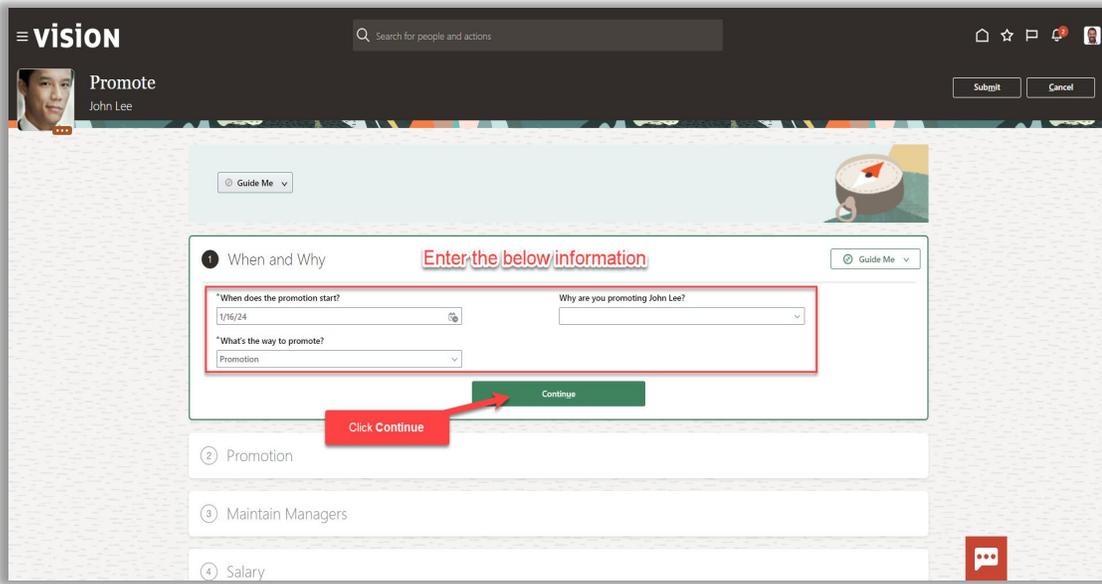
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



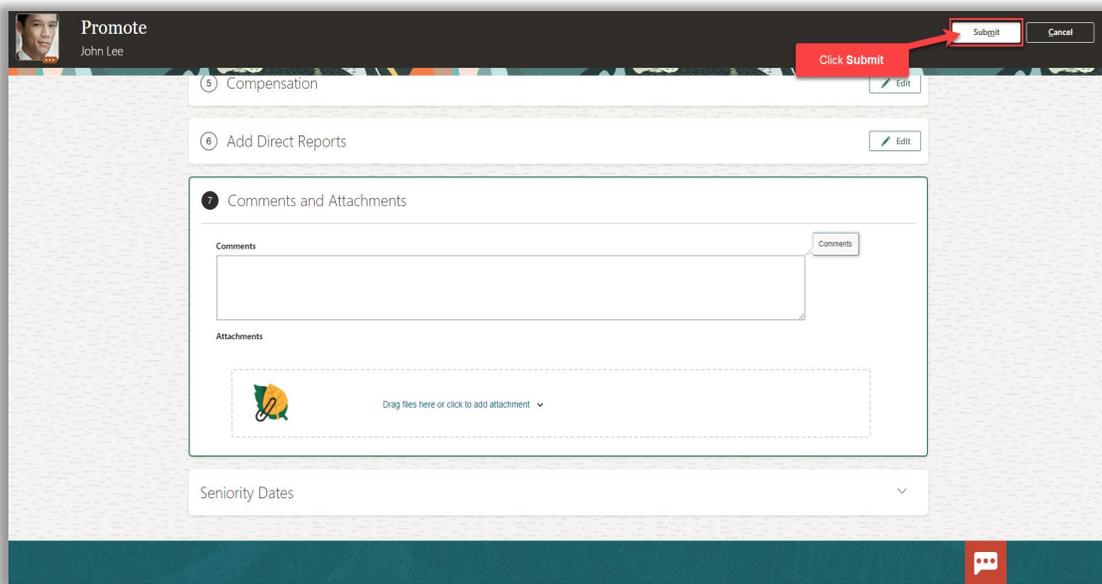
From the **Promote** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered. Click **Continue**



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



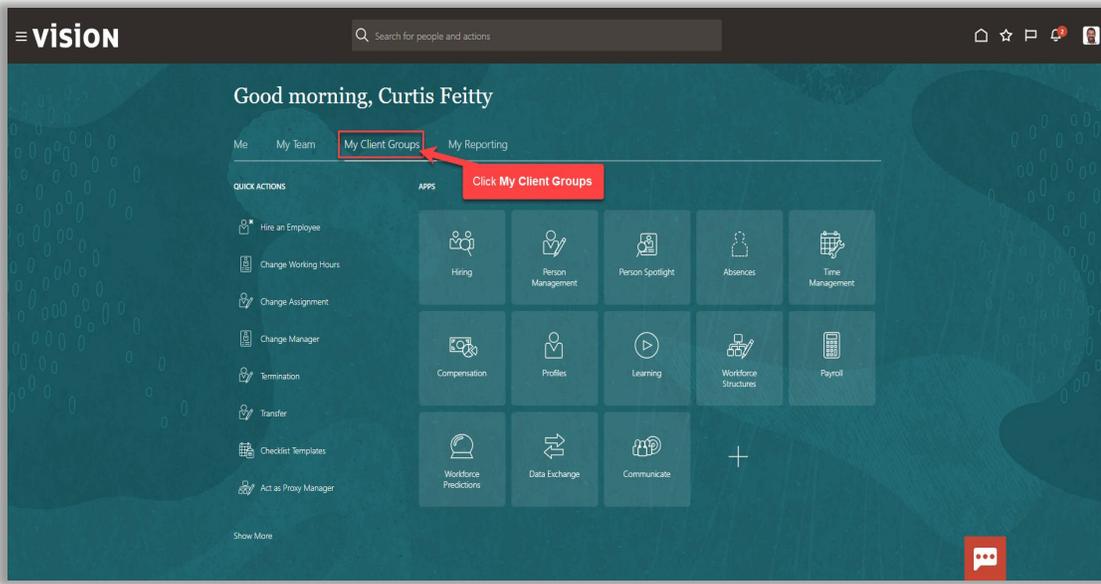
Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The promotion for this employee has been submitted.



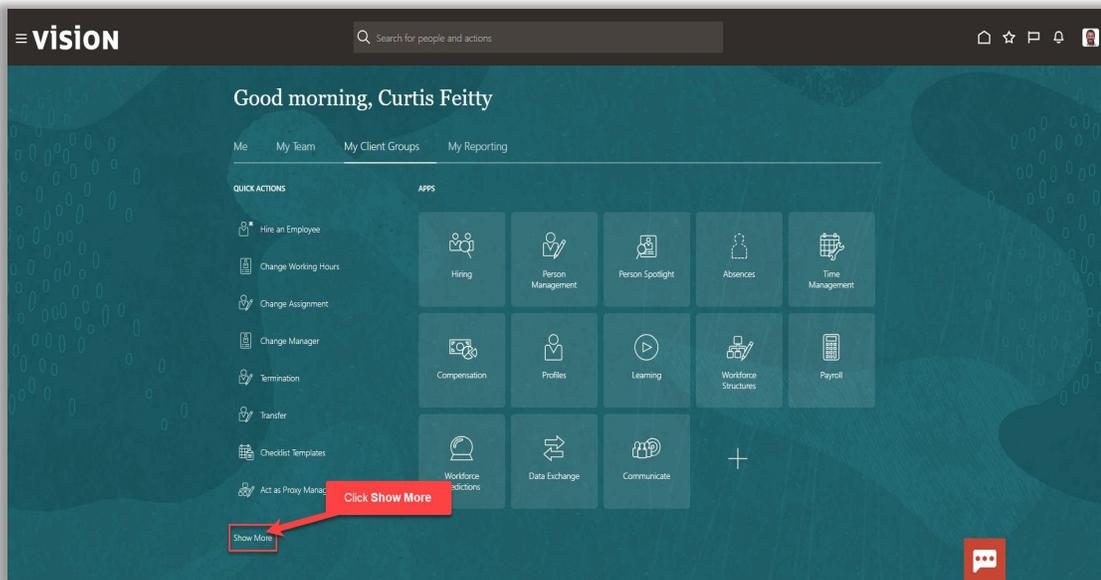
Terminate An Employee

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

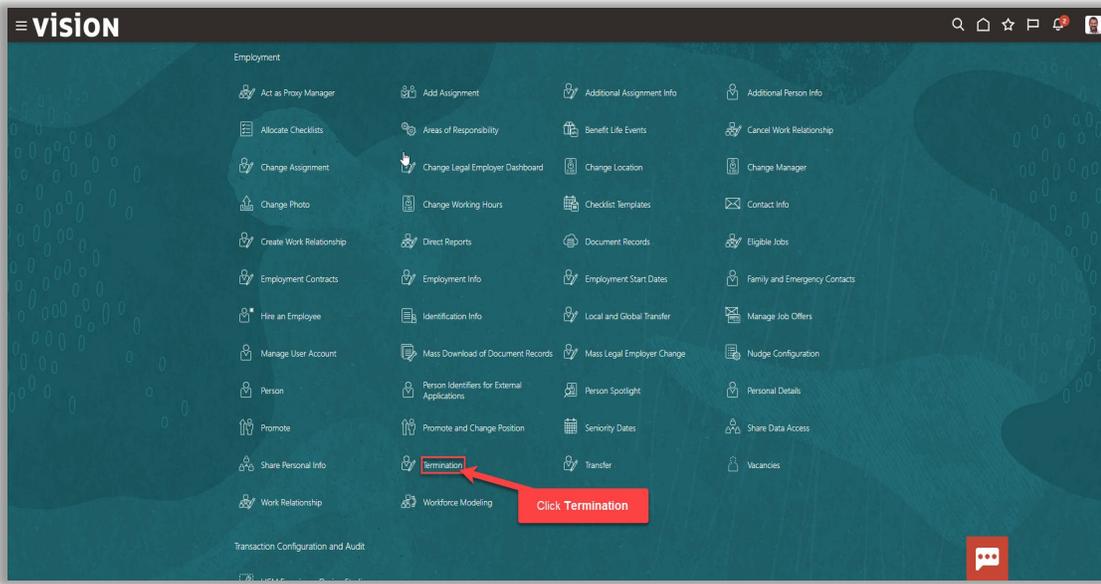
From the home screen, click **My Client Groups**



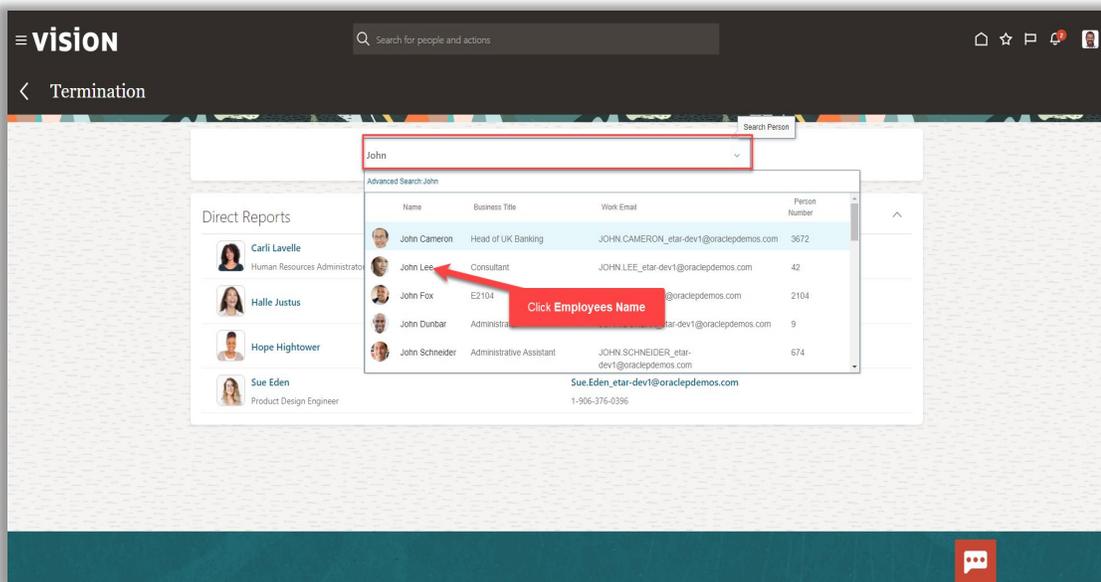
Next, click **Show More**



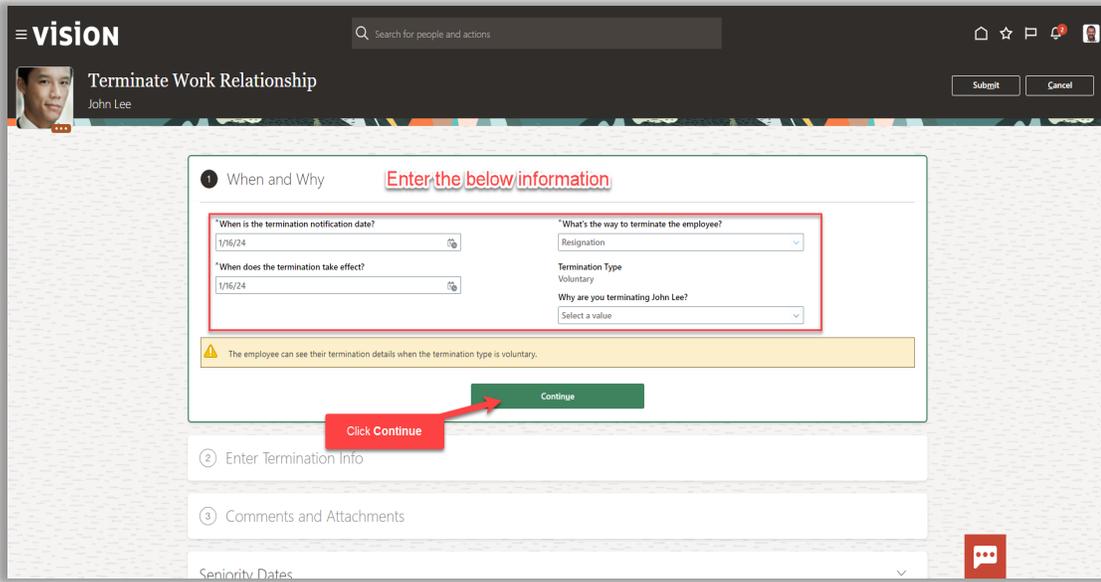
Scroll down and under **Employment**, click **Termination**. As a note, we can search **Termination** by clicking Ctrl F.



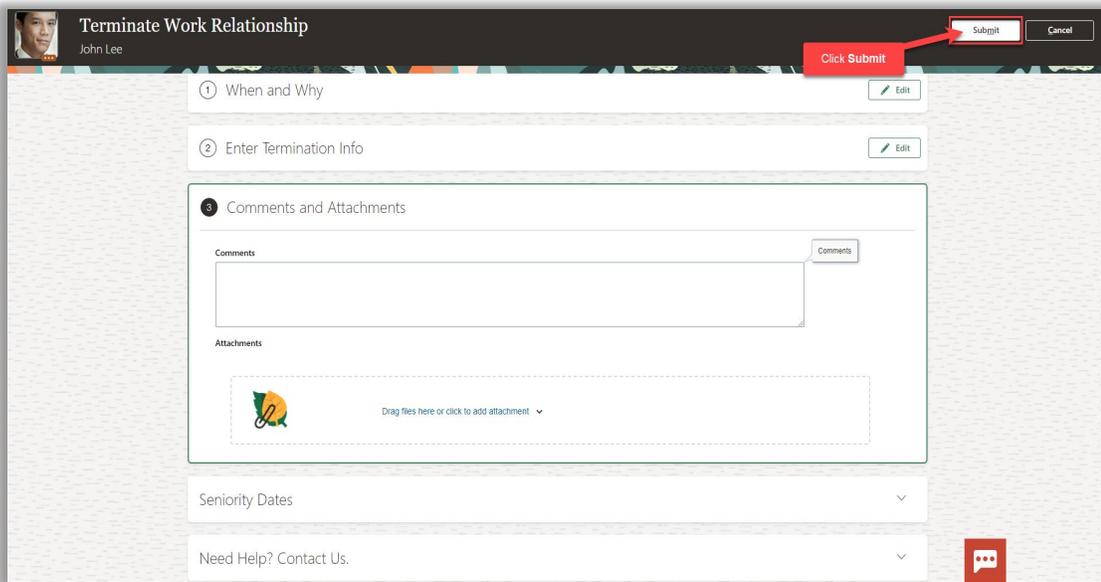
Enter the employees name in **Search for a Person** box, once the employees' name is shown, click the employees' name



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



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.

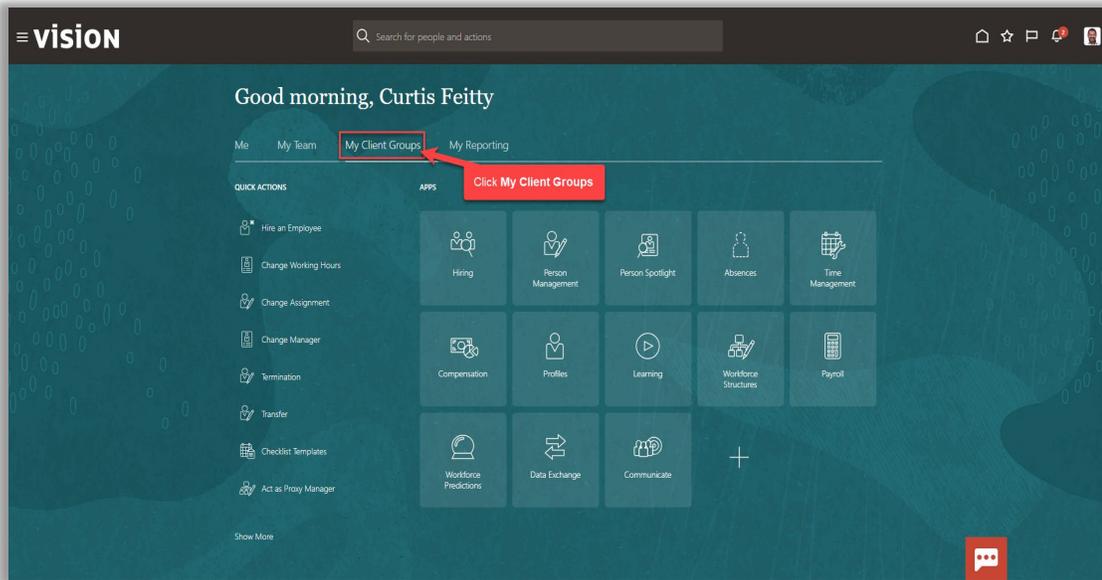


Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The termination for this employee has been submitted.

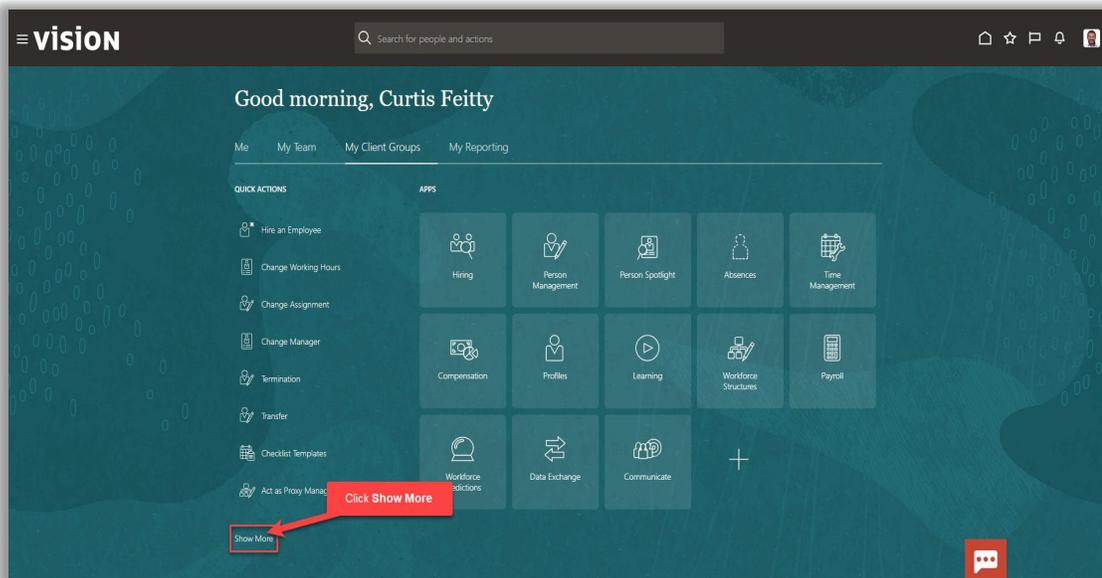
Search For A Terminated Employee

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

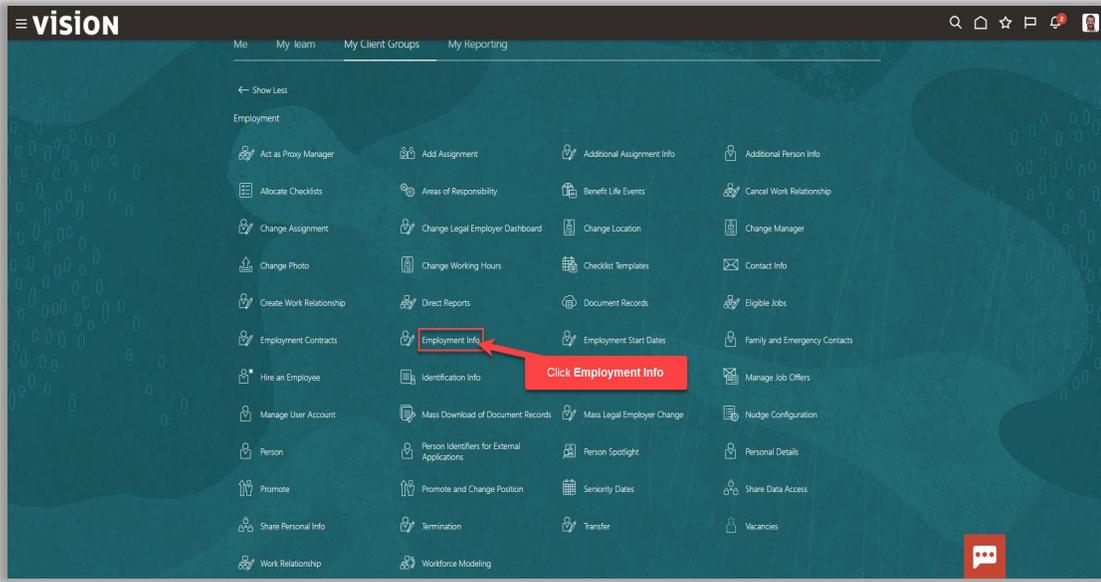
From the home screen, click **My Client Groups**



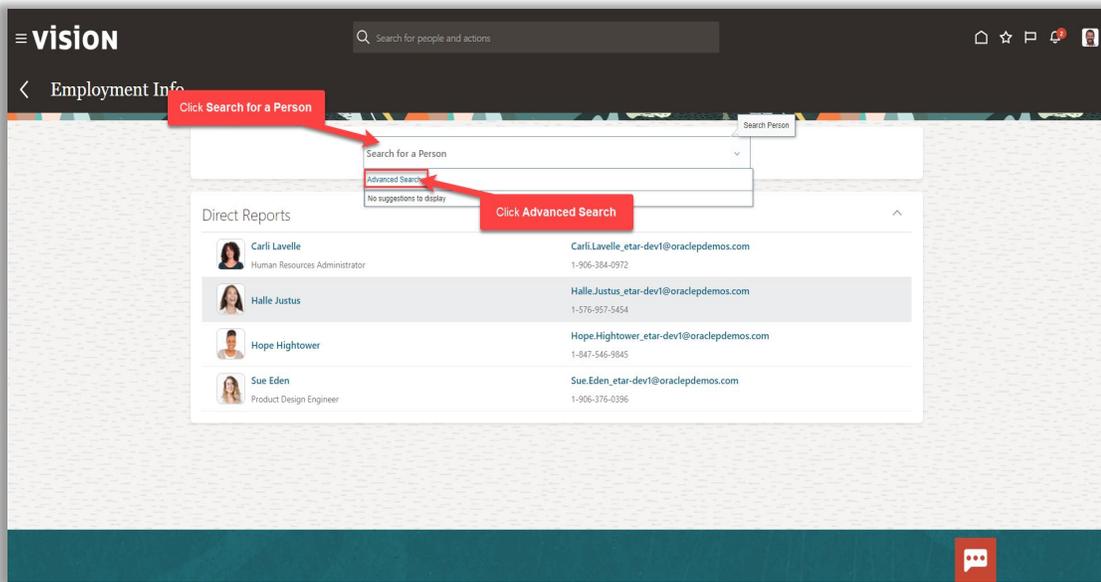
Next, click **Show More**



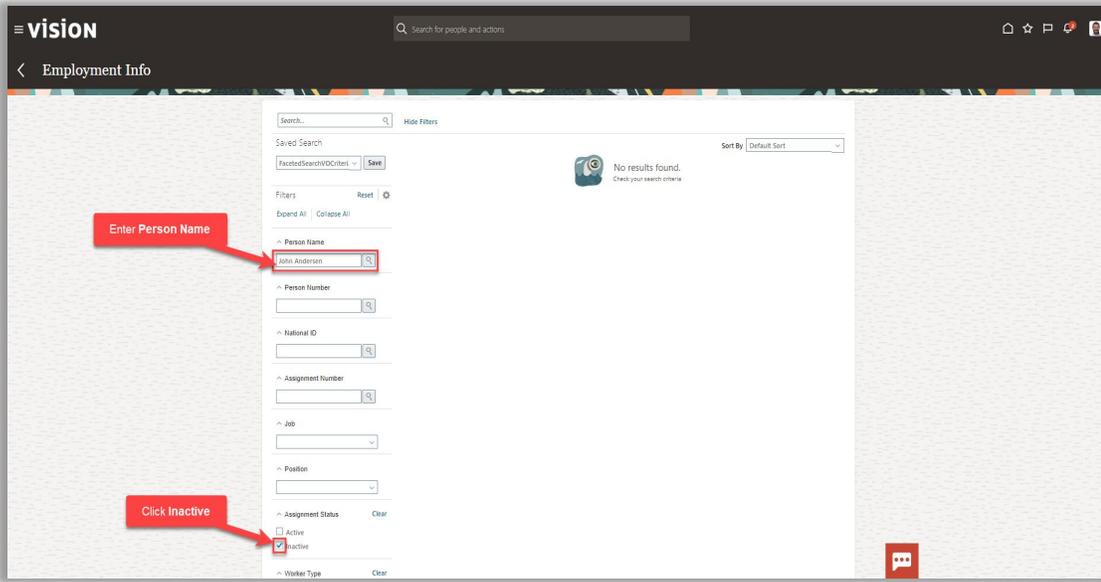
Scroll down and under **Employment**, click the applicable action. For example, if we wish to check the hire date for a terminated employee, we'd click **Employment Info**. As a note, we can search **Employment Info** by clicking Ctrl F.



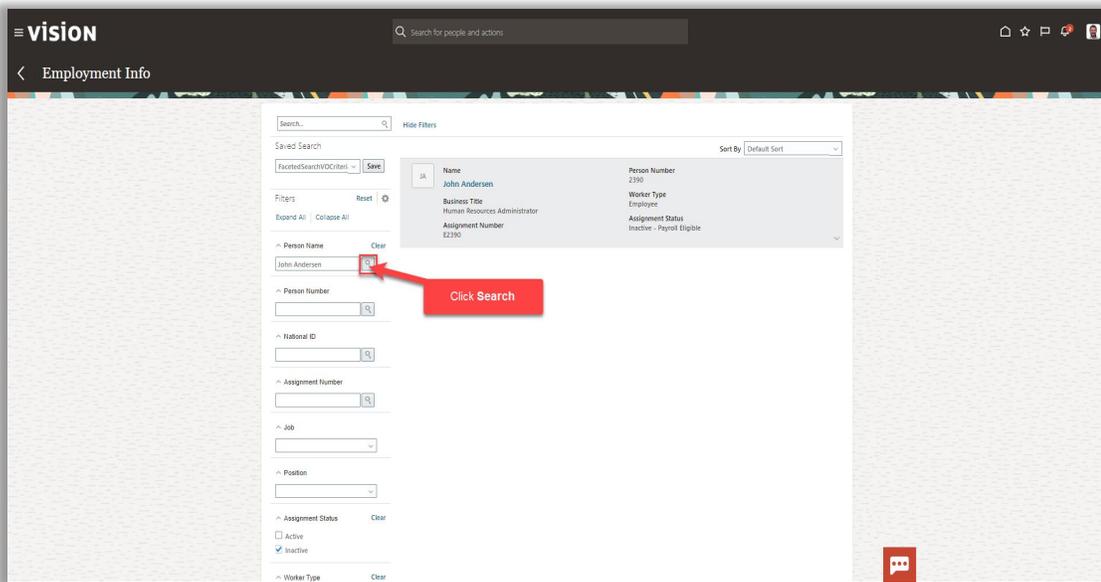
In the Search for a Person box, click **Advanced Search**



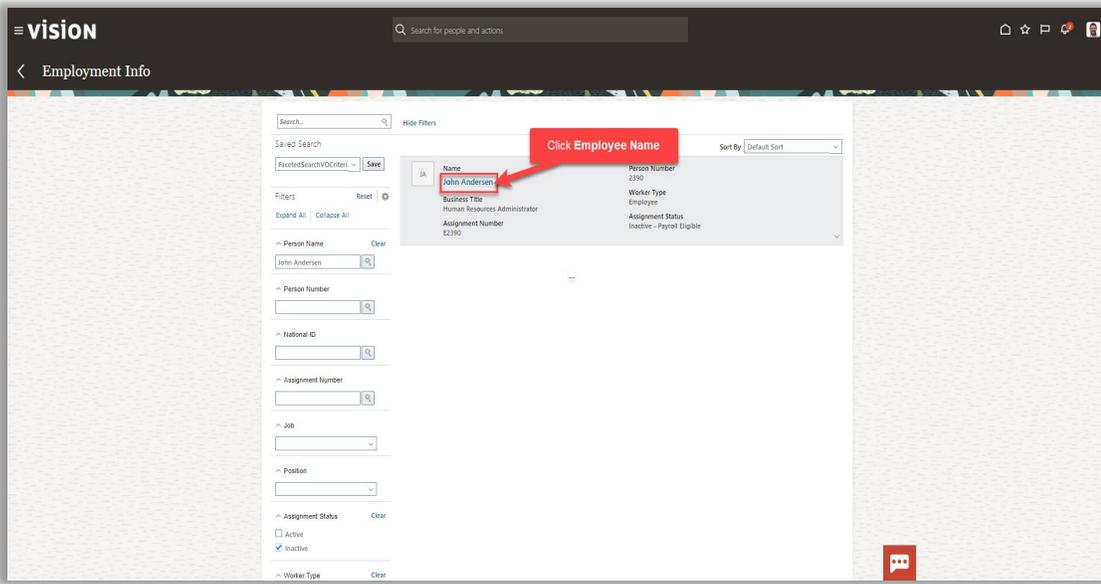
Enter the **Person Name** and click **Inactive**



Then, click **Search**



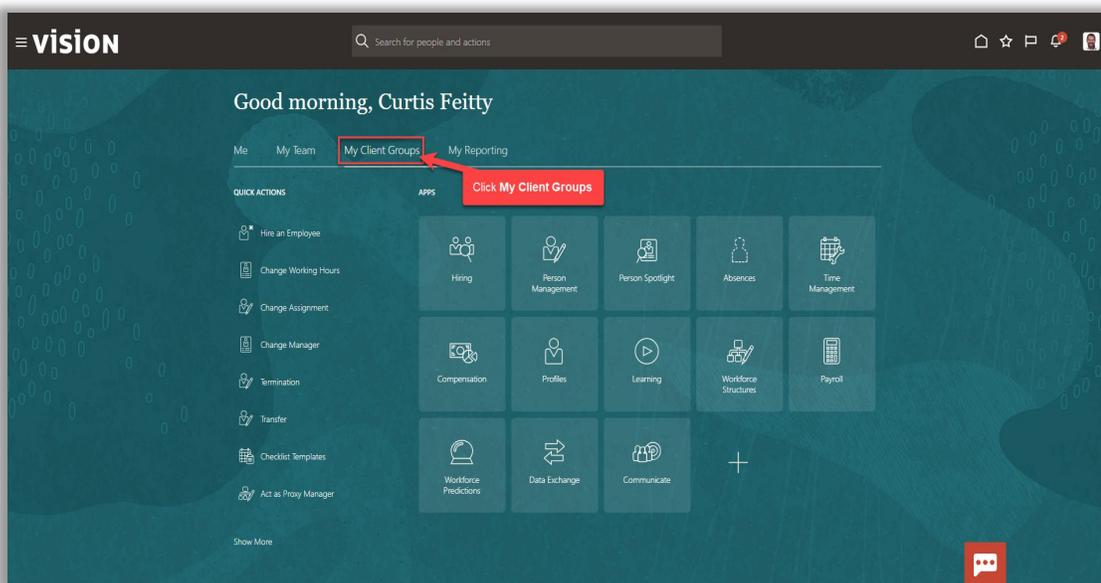
The terminated assignment(s) for the employee will generate. We can select the terminated assignment to view the details.



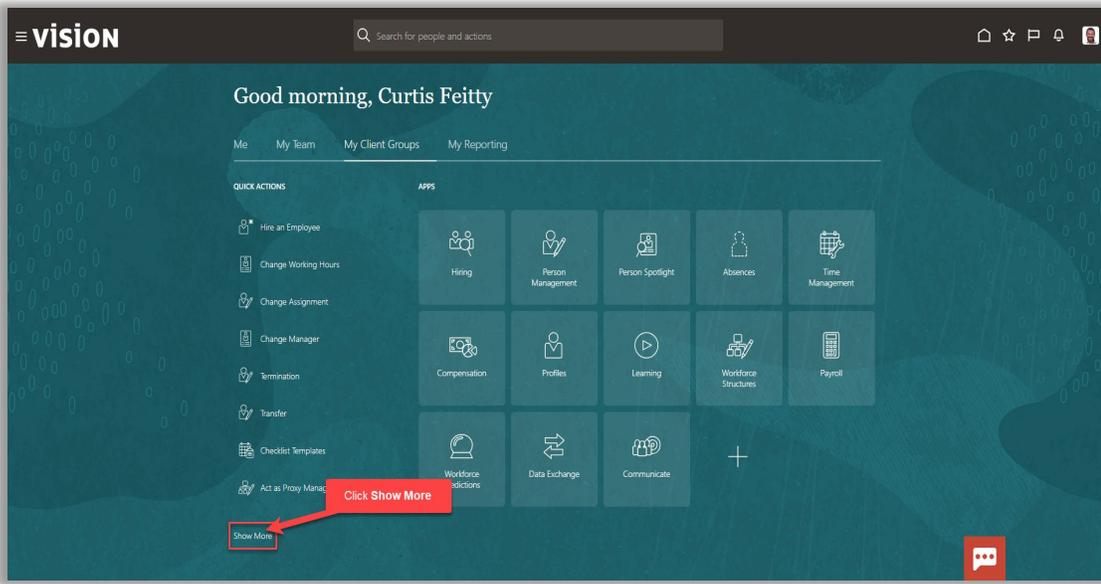
Reverse A Termination

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

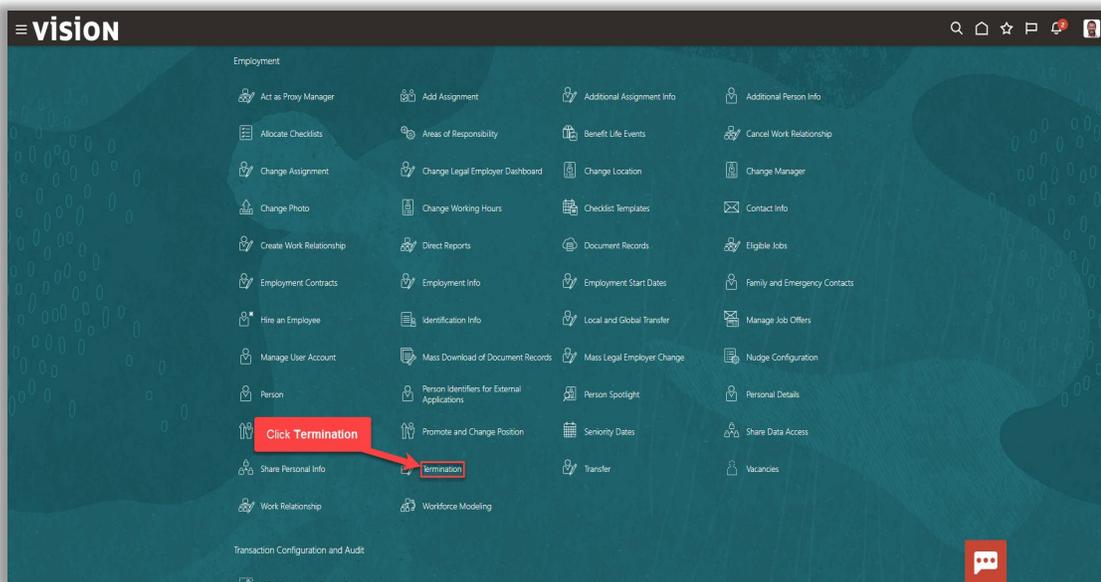
From the home screen, click **My Client Groups**



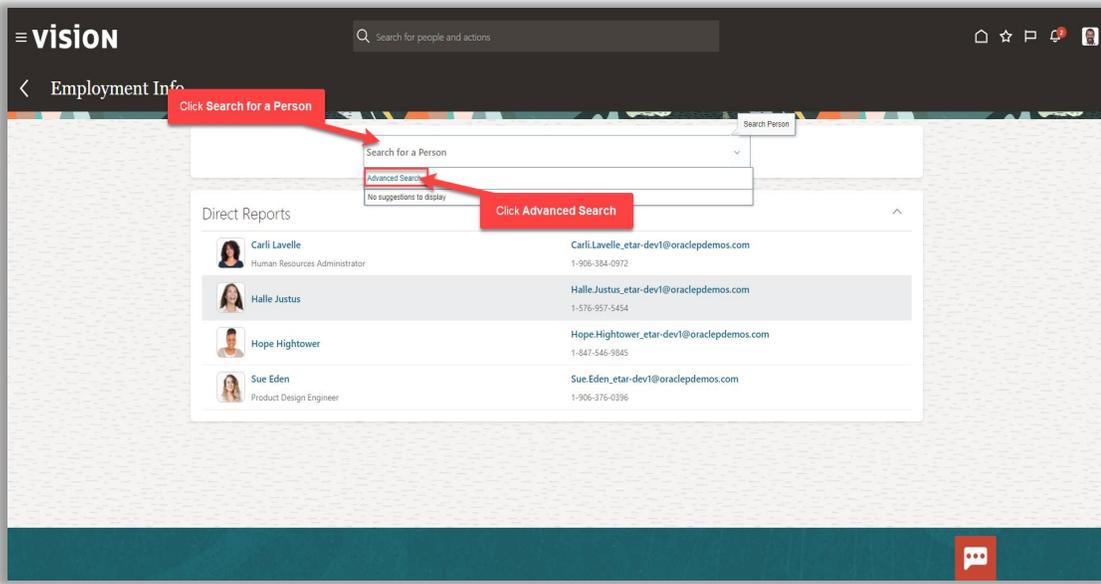
Next, click **Show More**



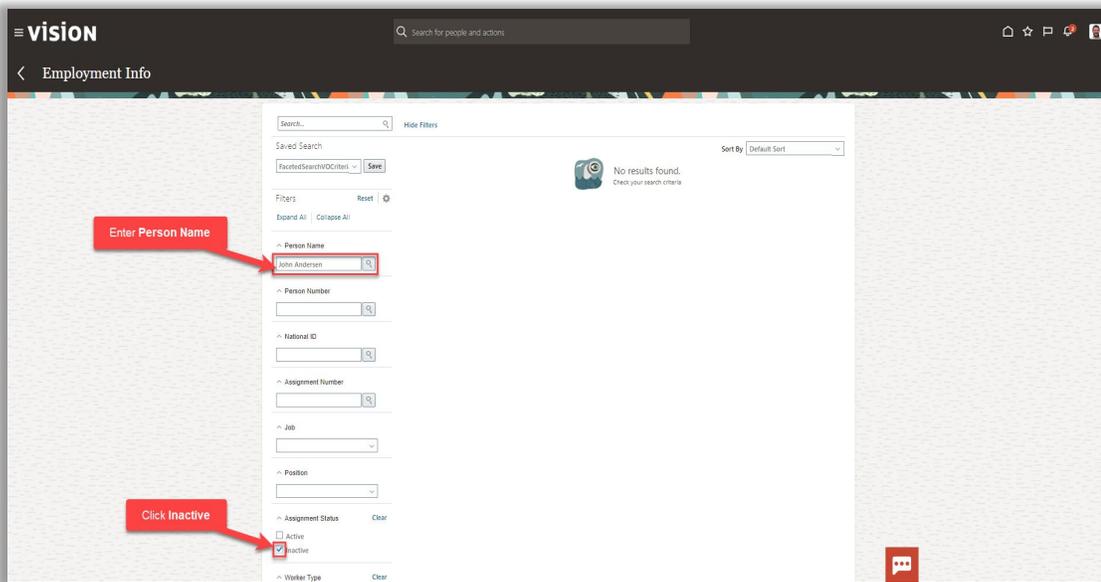
Scroll down and under **Employment**, click **Termination**. As a note, we can search **Termination** by clicking Ctrl F.



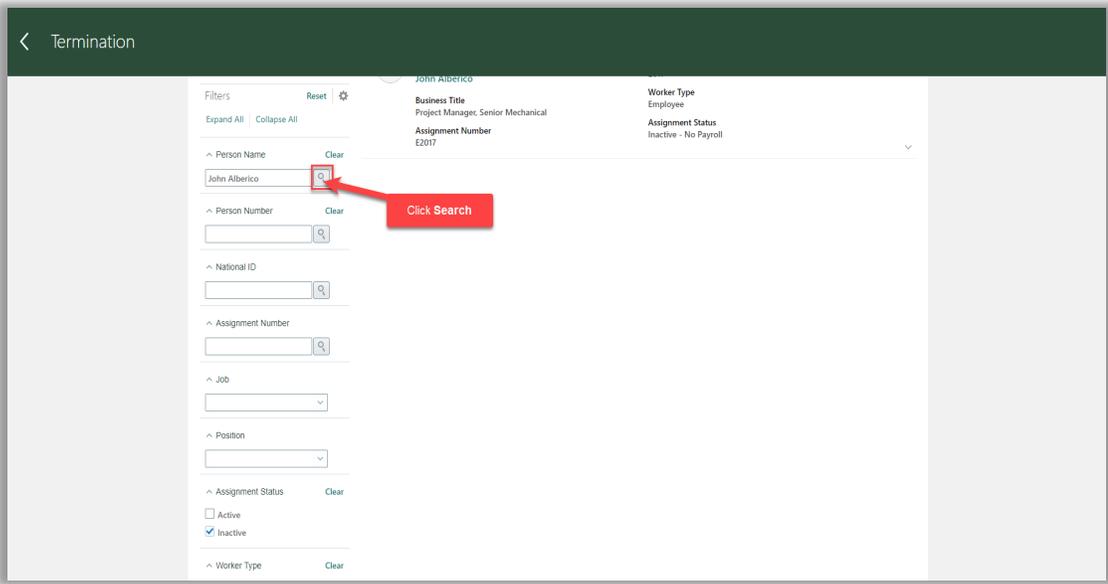
In the **Search for a Person** box, click **Advanced Search**



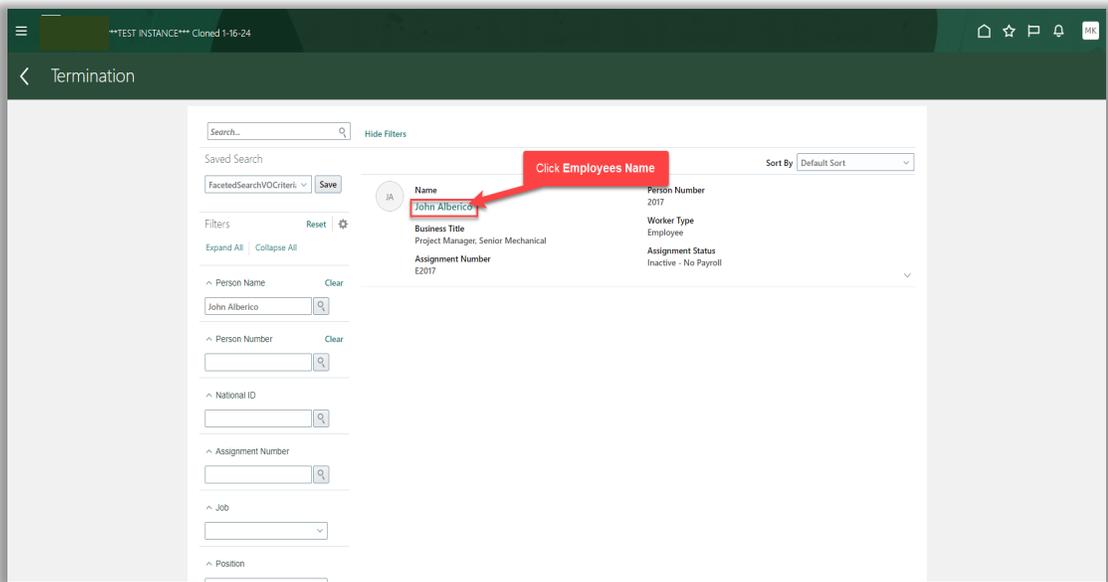
Enter the **Person Name** and click **Inactive**



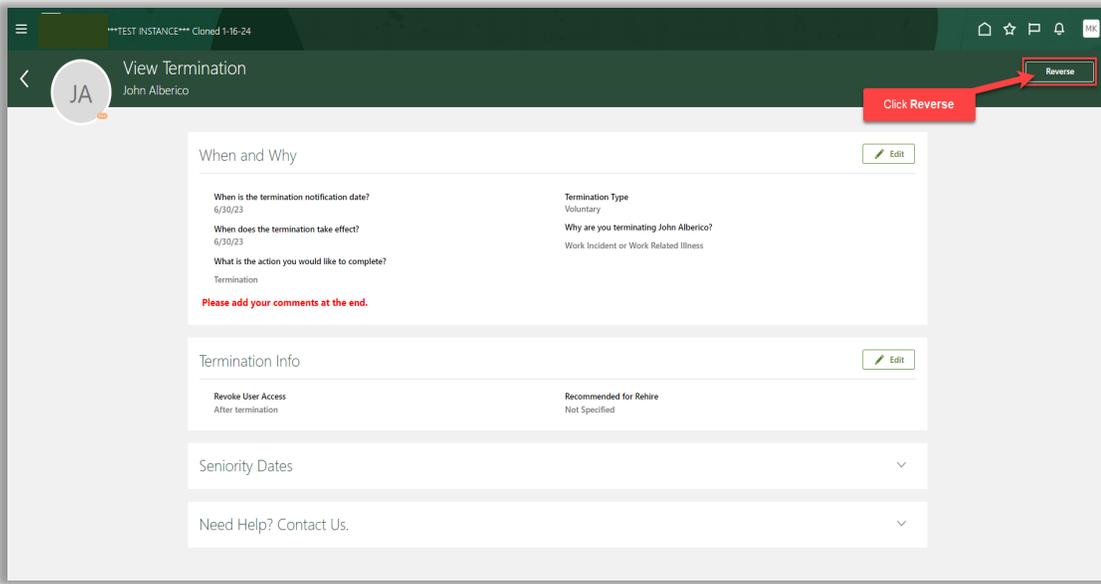
Then, click **Search**



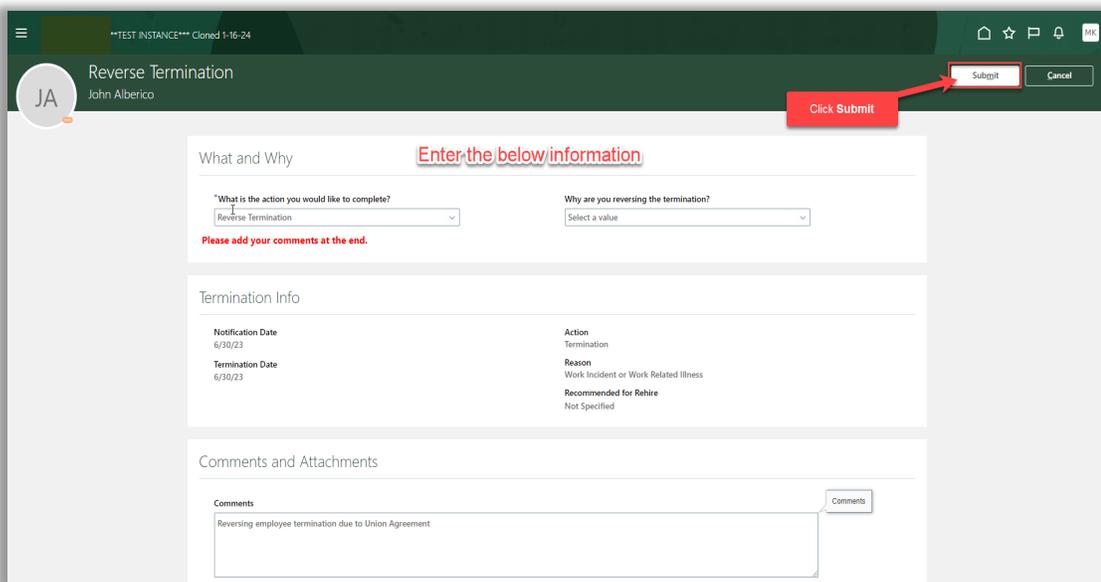
Click Employees Name



Click Reverse



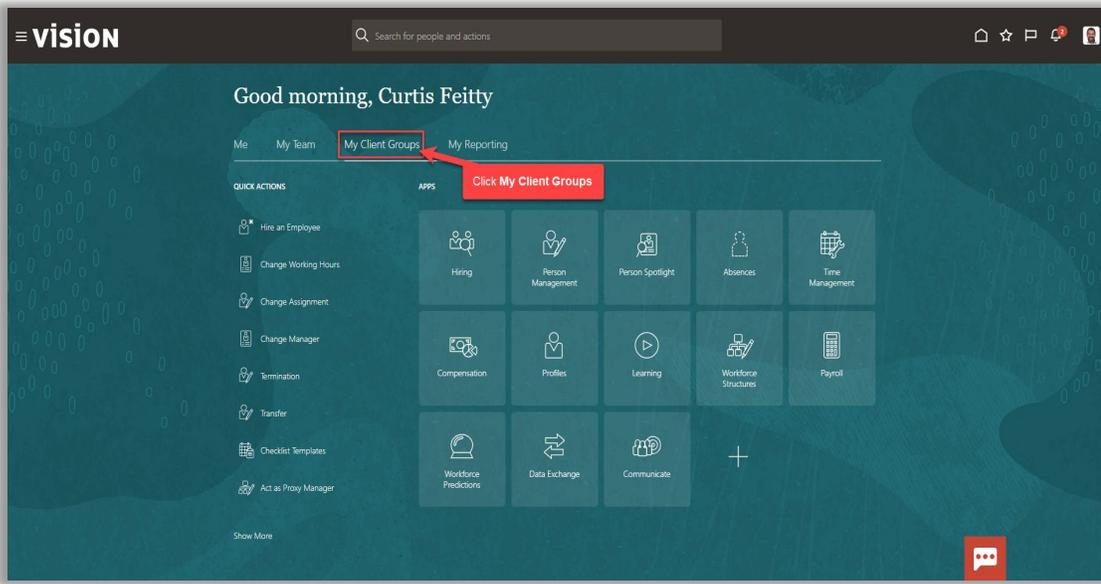
Enter the **What** and **Why** information and click **Submit**



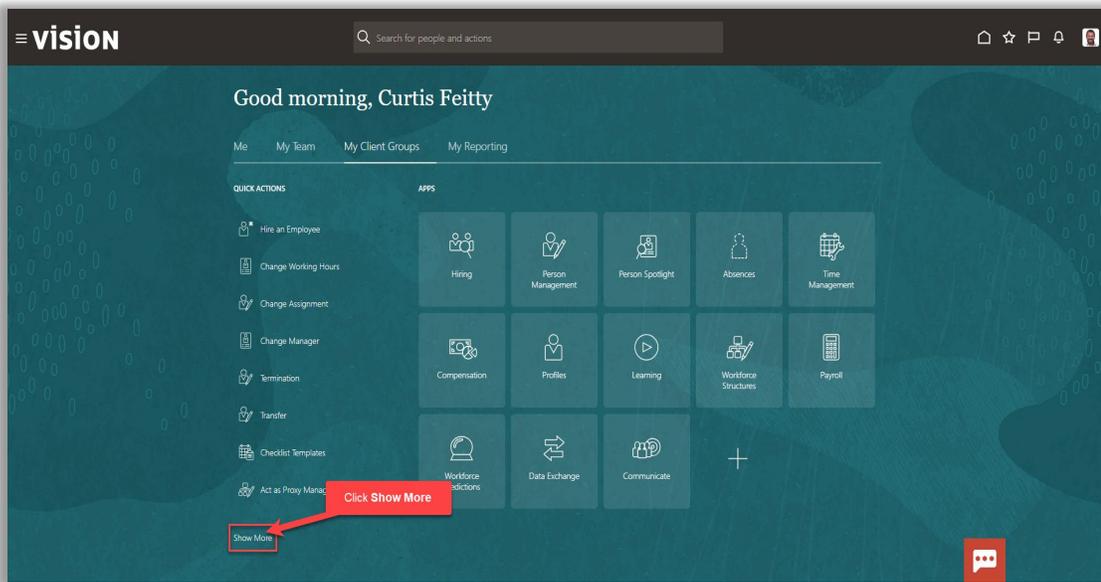
Update Employee Address

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

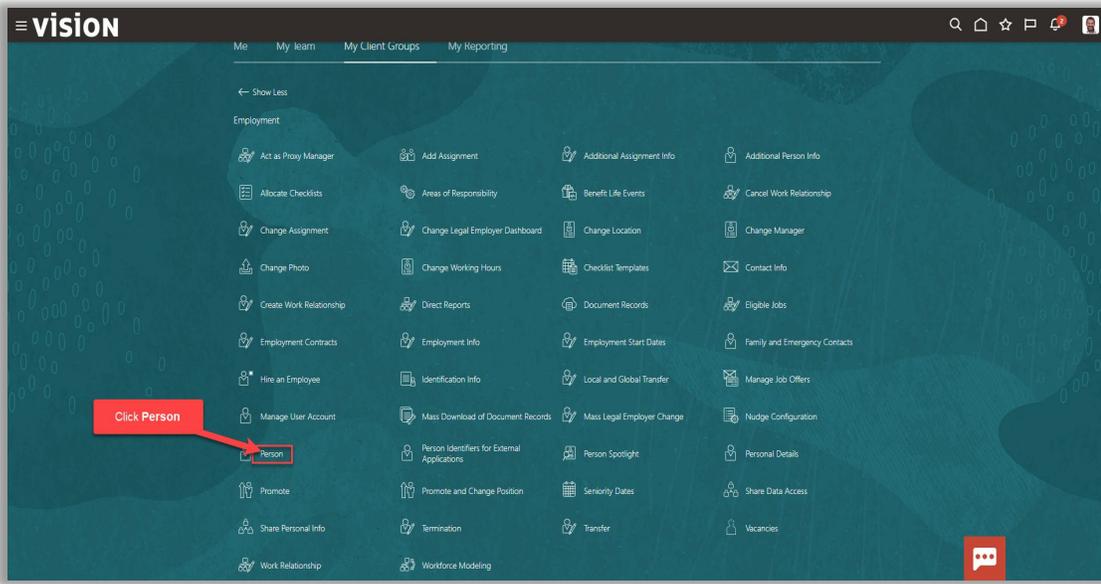
From the home screen, click **My Client Groups**



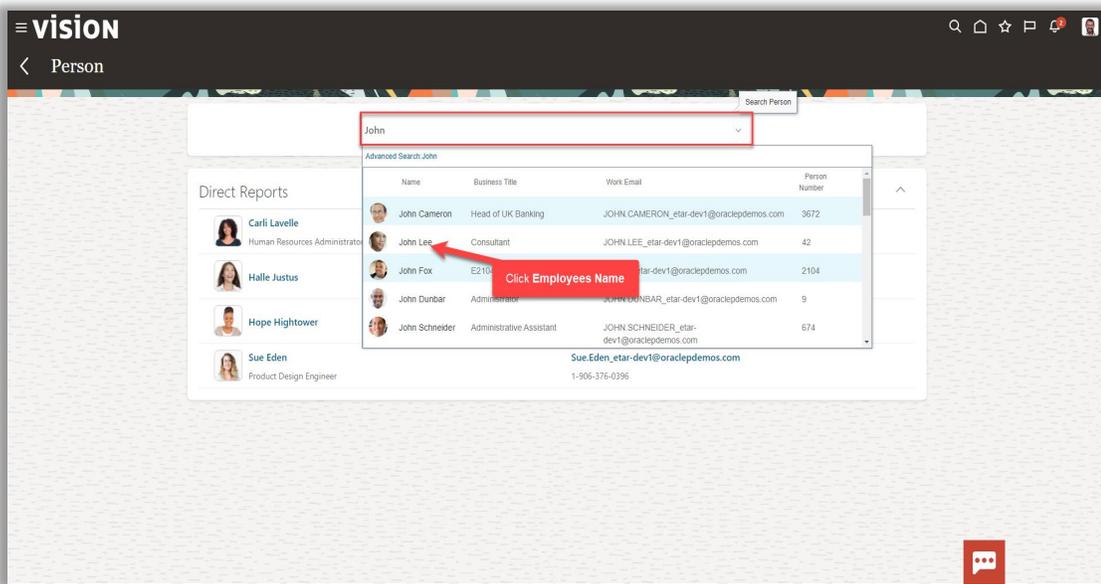
Next, click **Show More**



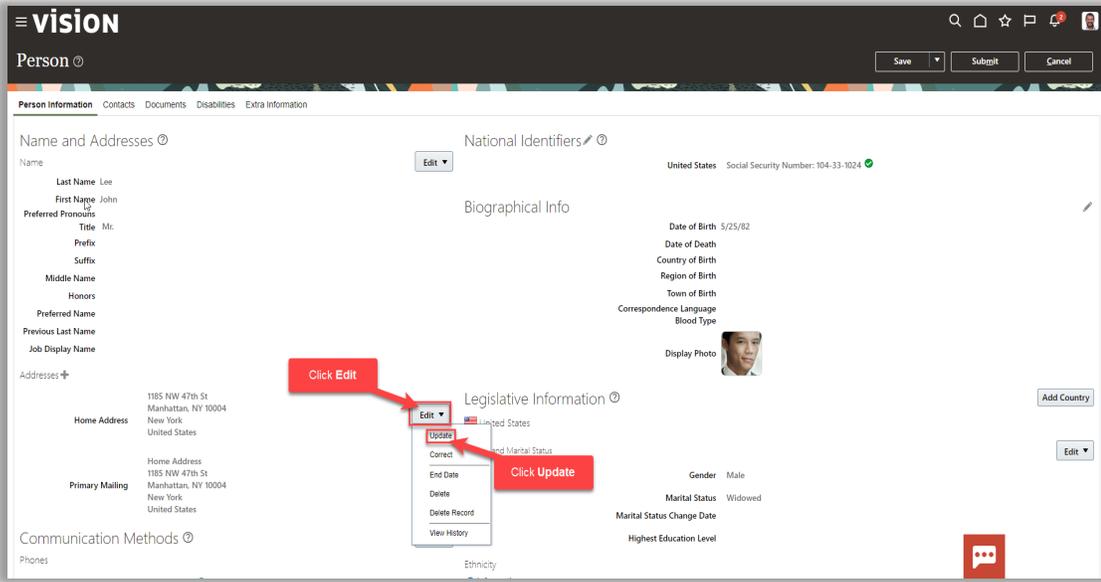
Scroll down and under **Employment**, click **Person**. As a note, we can search **Person** by clicking Ctrl F.



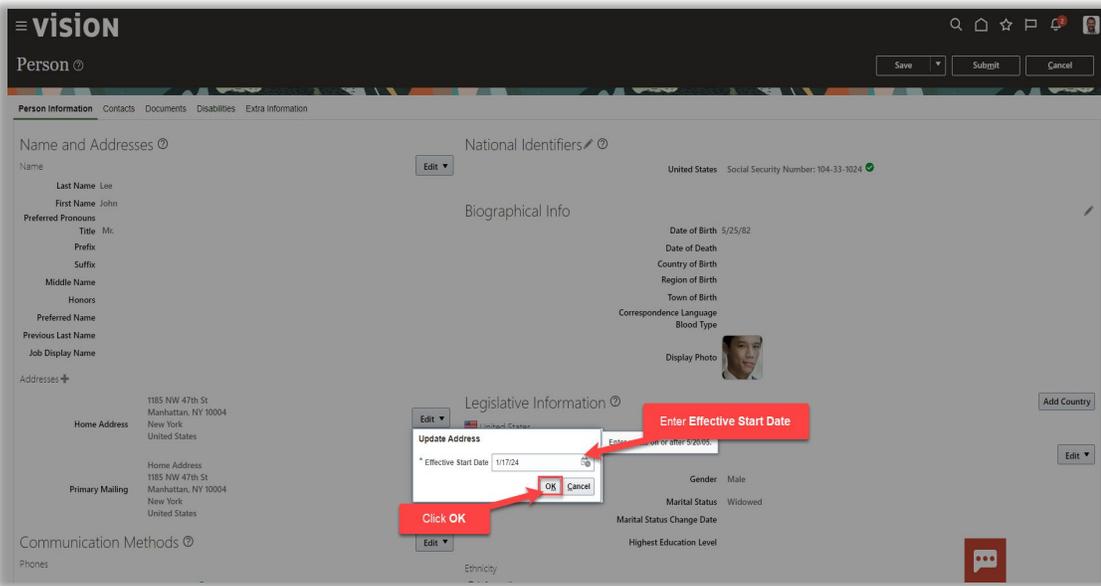
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



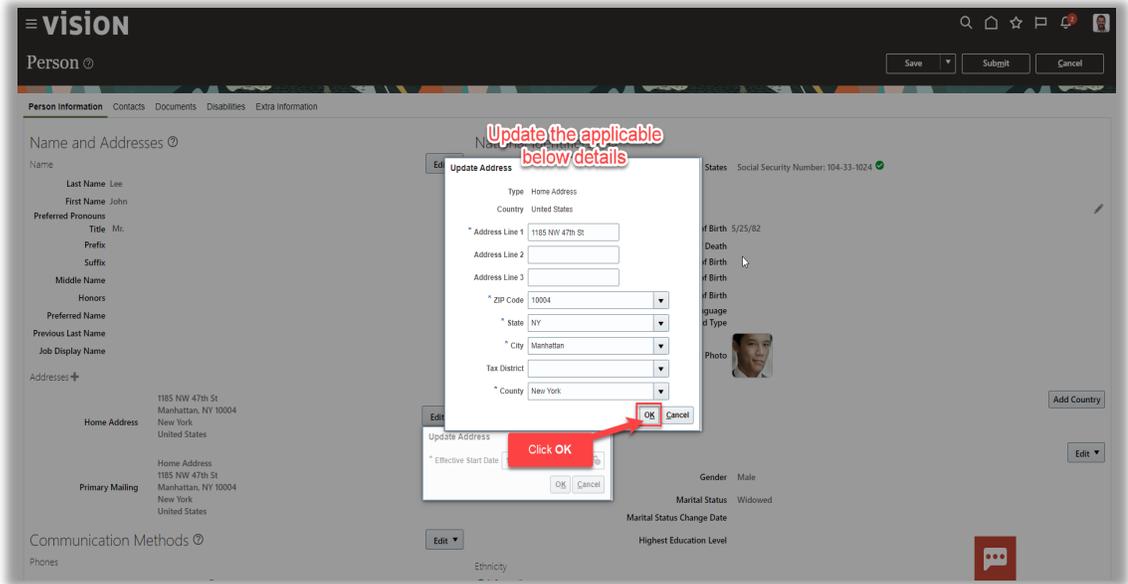
Next, click **Edit** across from the address then, click **Update**



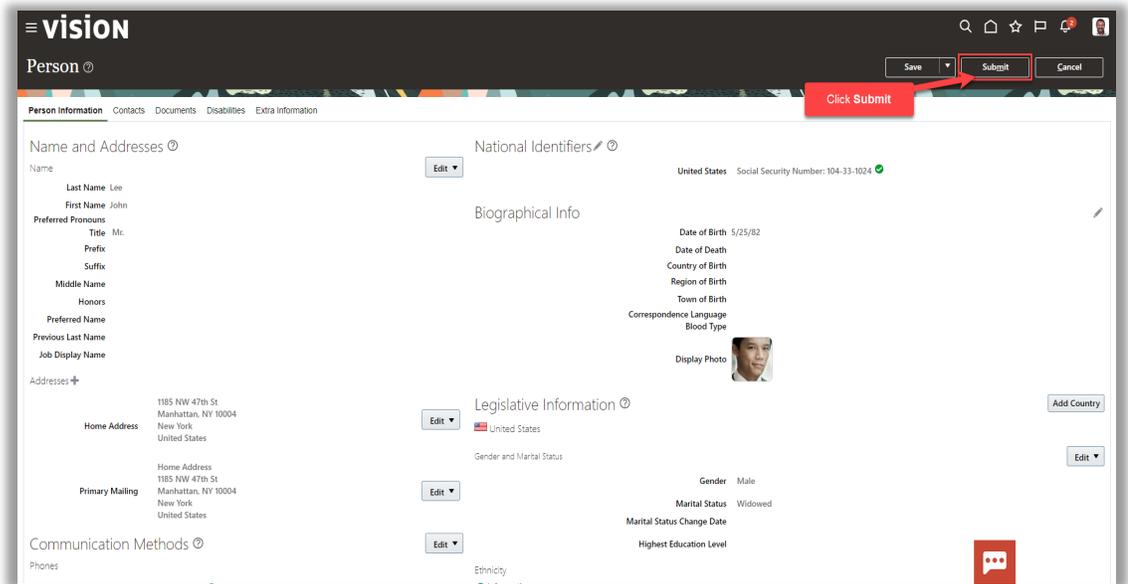
Enter the **Effective Start Date** of the address change then click **OK**



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**



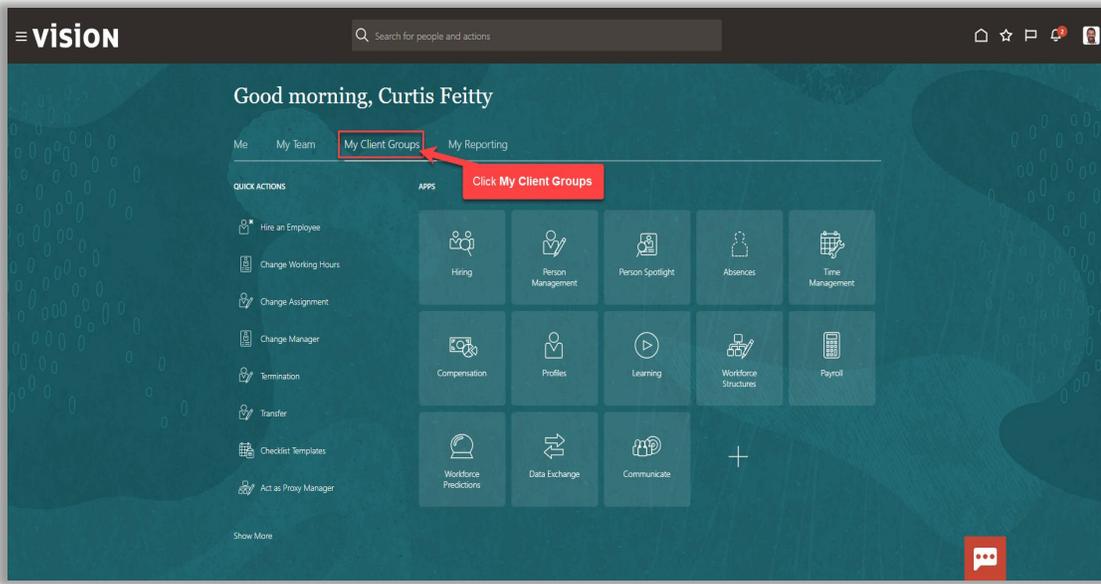
Click **Submit** to submit the address updates. The address will be updated as of the Effective Start Date entered



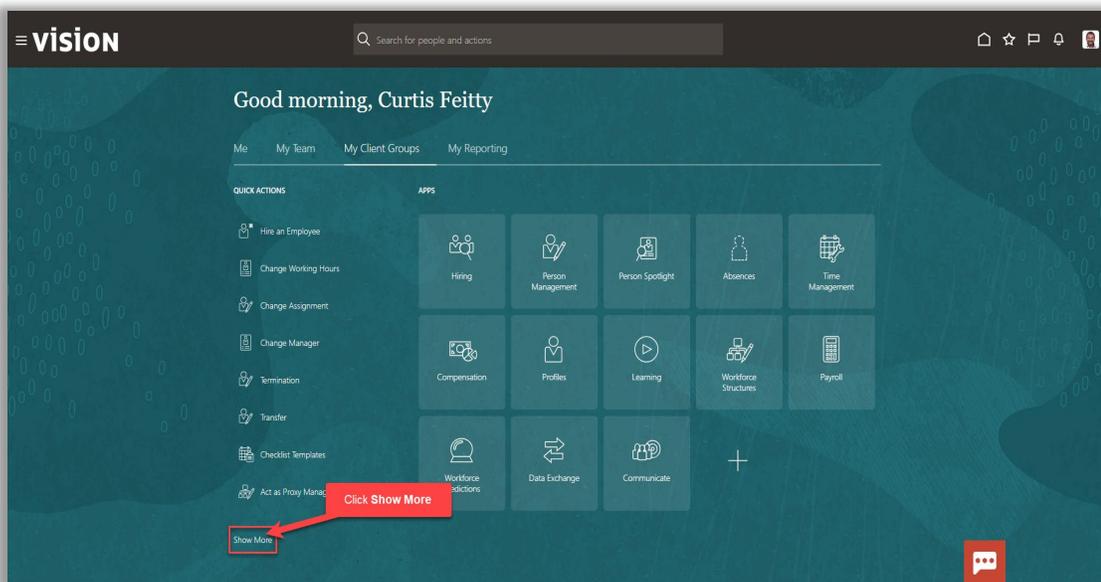
Update An Employees Work Location

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

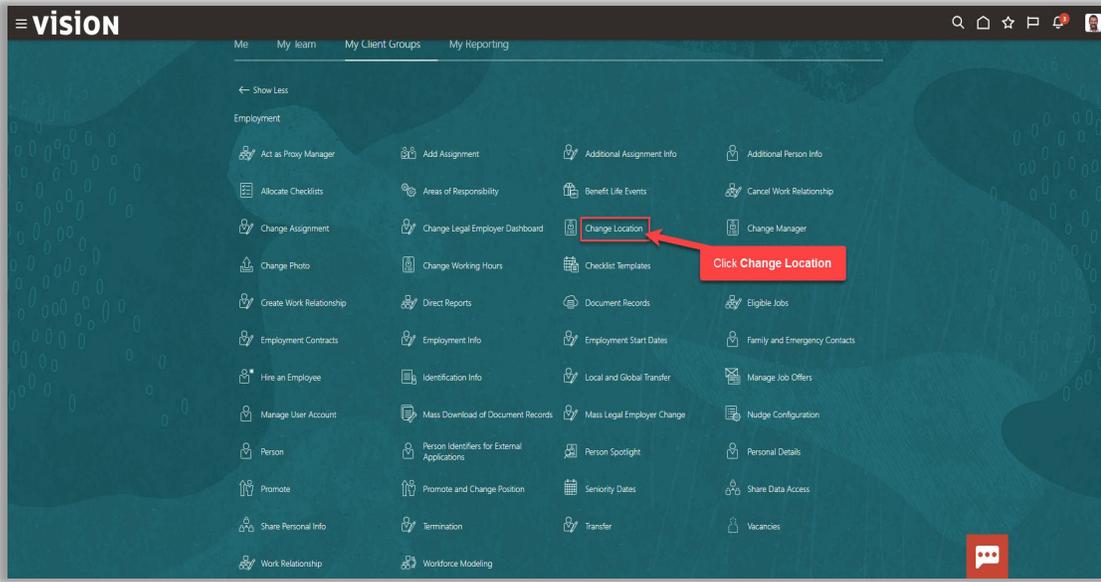
From the home screen, click **My Client Groups**



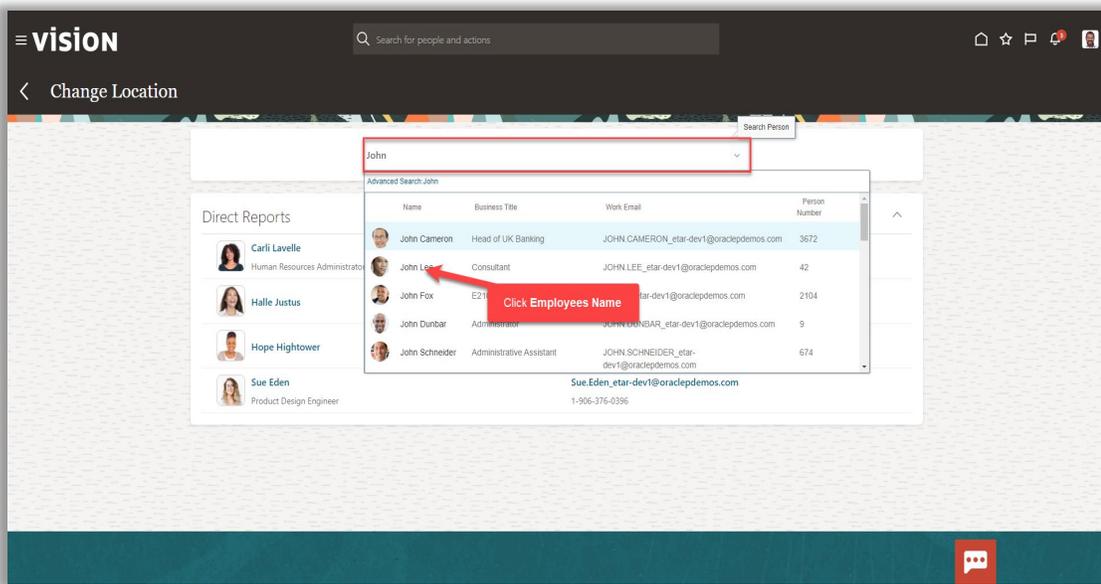
Next, click **Show More**



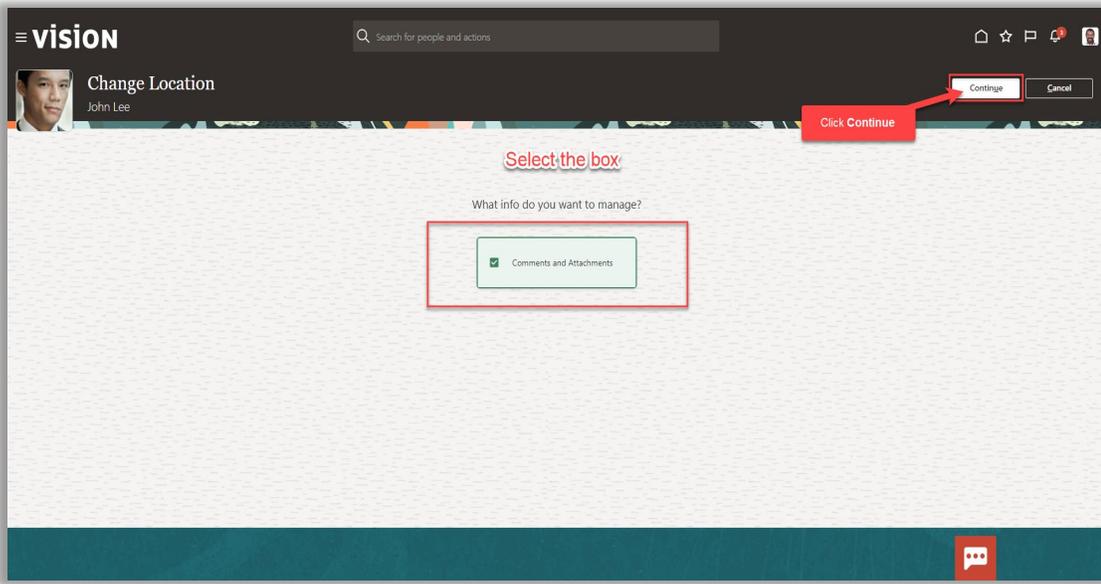
Scroll down and under **Employment**, click **Change Location**. As a note, we can search **Change Location** by clicking Ctrl F.



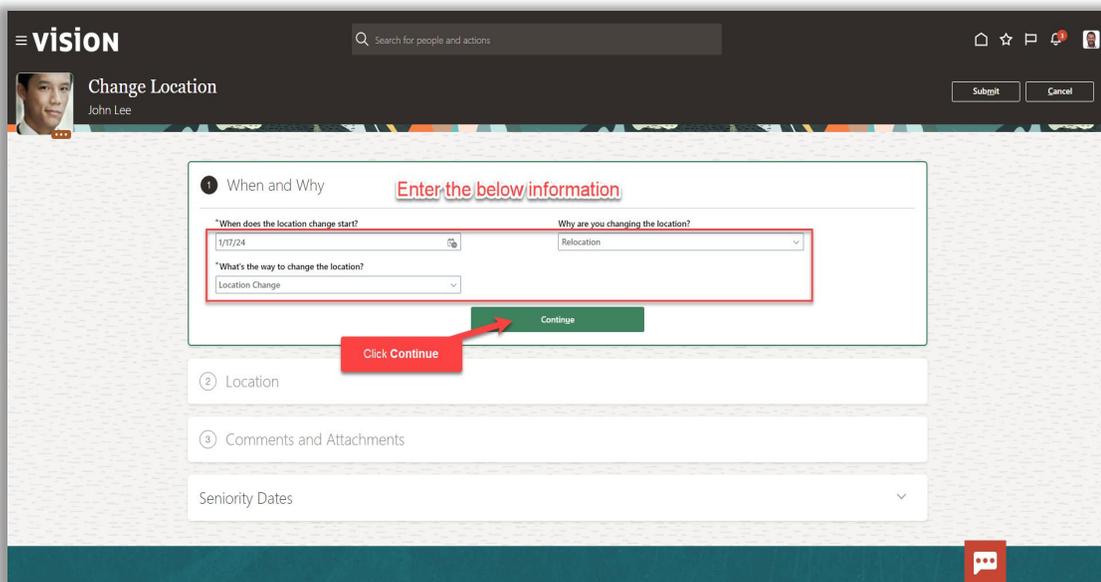
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



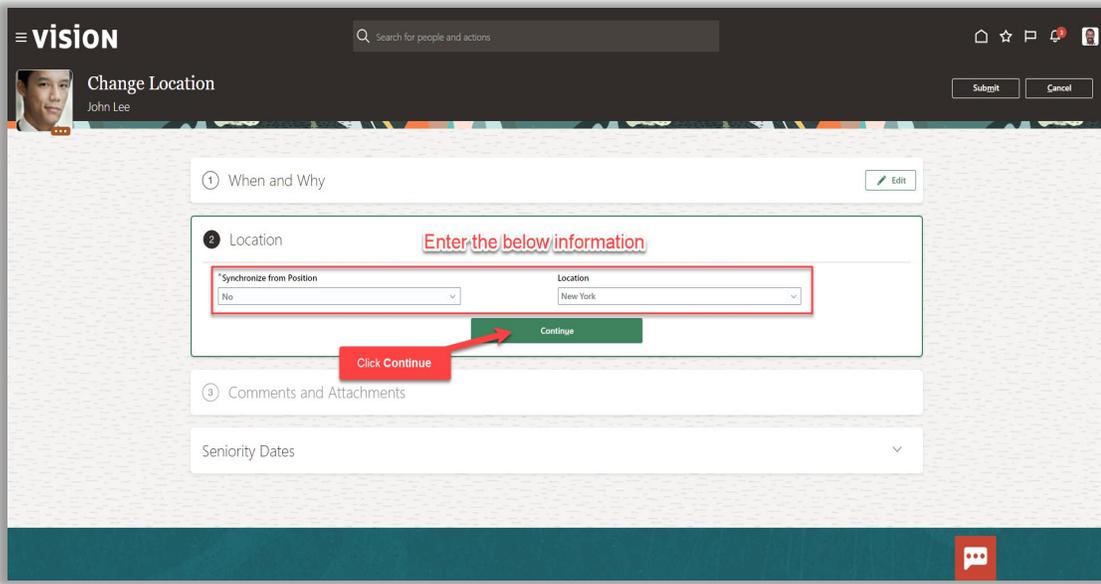
Next, click **What info do we want to manage?** Click **Continue**



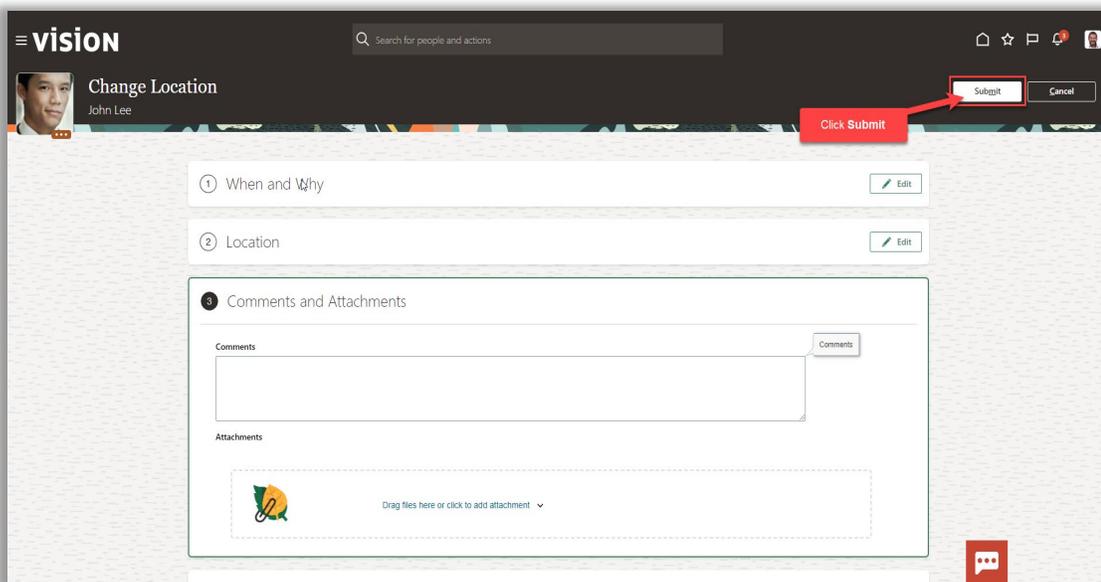
Enter the **When and Why** details and click **Continue**



Enter the **Locations** details and click **Continue**



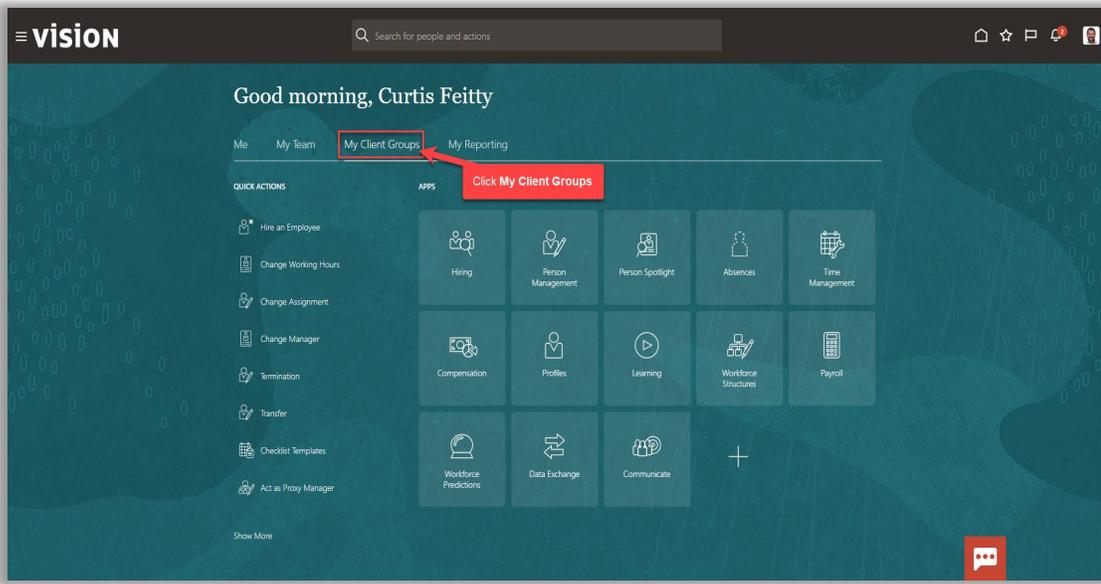
Enter Comments and Attachments, if applicable, and click **Submit**



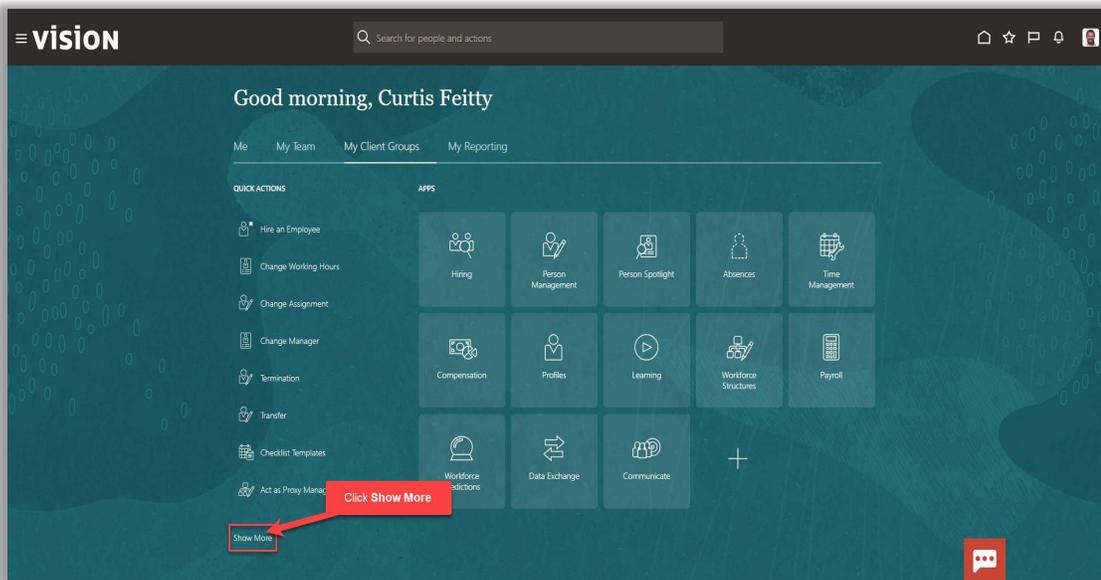
Add or Edit A Contact or Dependent

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

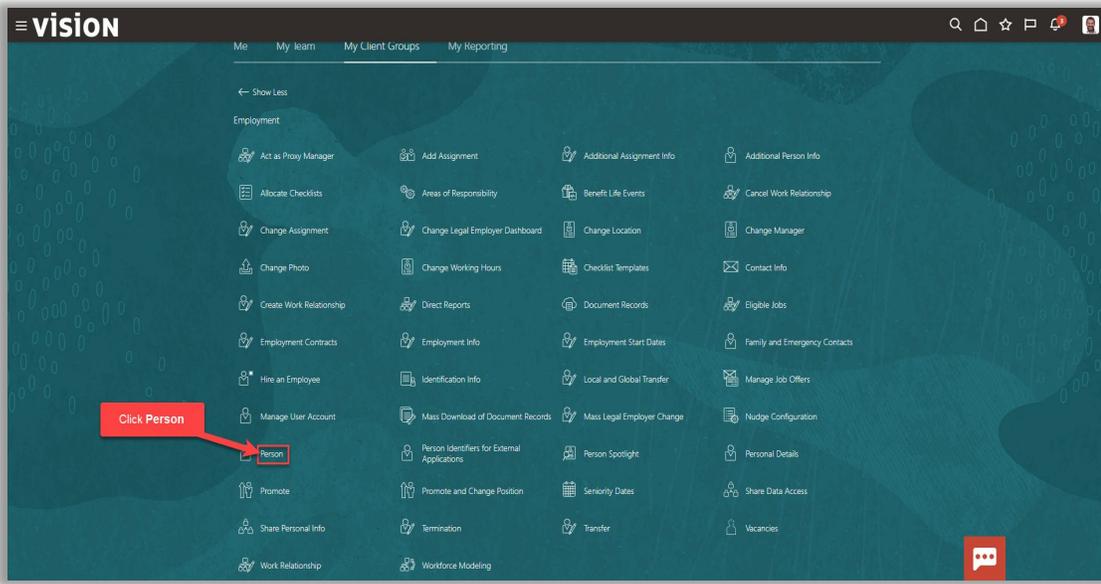
From the home screen, click **My Client Groups**



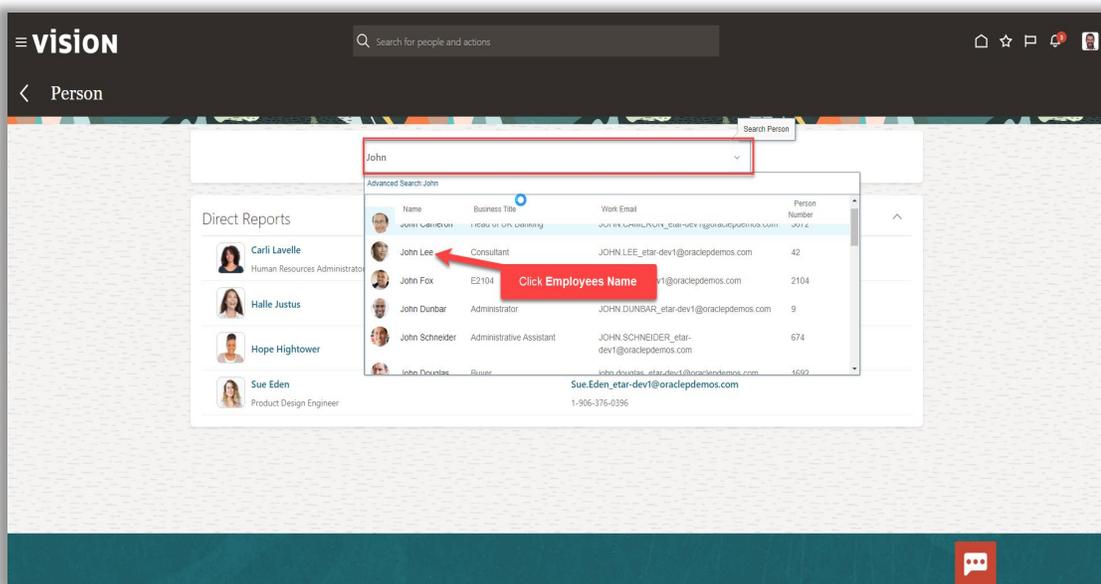
Next, click **Show More**



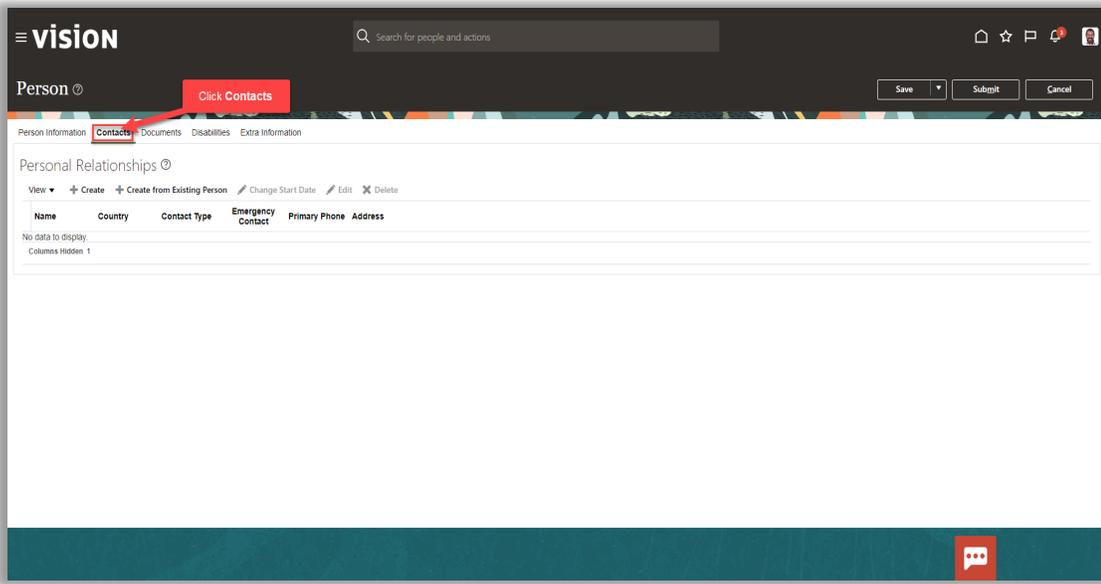
Scroll down and under **Employment**, click **Person**. As a note, we can search **Person** by clicking Ctrl F



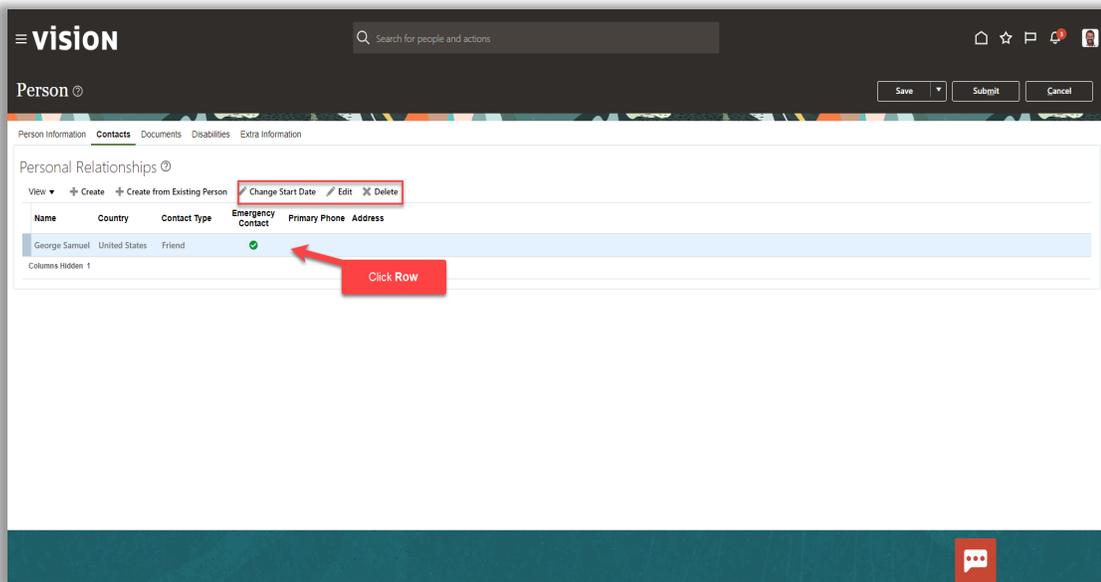
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



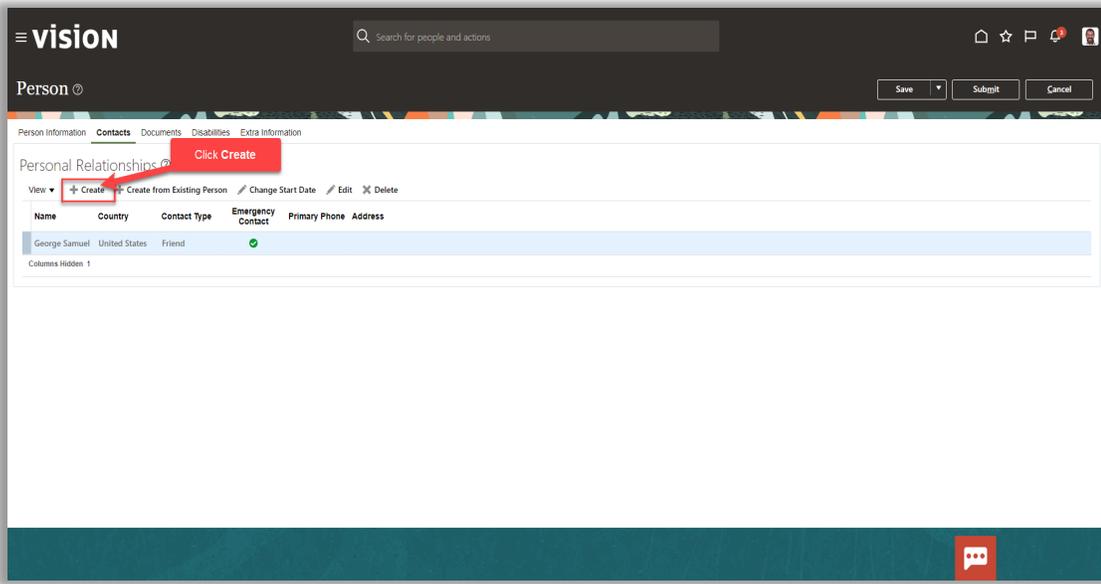
Select the **Contacts** tab to manage contacts. Here we can view this employees existing contacts



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



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**



For this example, we'll click **Create**. Enter the information and click **OK**

Create Contact

Enter the below information

Relationship Information

Country: United States

* Contact Type: Espous

* Emergency Contact: No

* Effective Start Date: 1/18/24

TIN Type: Social Security Number

TIN Number: 22184768

Benefits Offered Conditionality: []

Personal Info

Global Name Language: American English

* Last Name: Fatty

First Name: Samantha

Preferred Pronoun: (She/her)

Title: []

Prefix: []

Suffix: []

Middle Name: L

Honors: []

Preferred Name: []

Previous Last Name: []

Job Display Name: []

Enter local name

Gender: Female

Date of Birth: 1/3/90

Phones

Primary	Type	Country Code	Area Code	Number
<input checked="" type="checkbox"/>	Home Mobile	United St	514	251-7943

Addresses

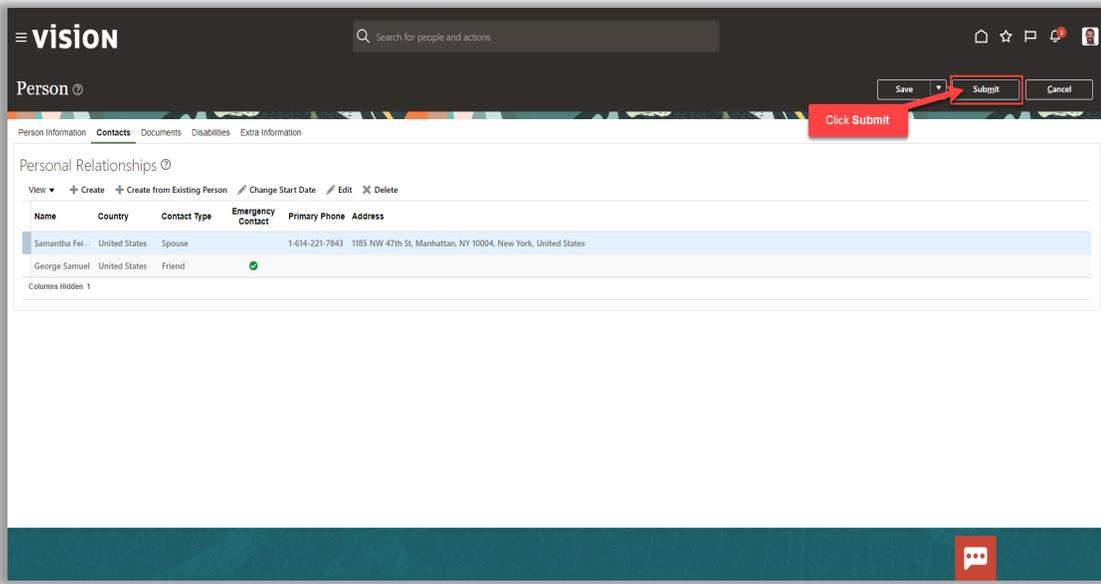
Home Address: 1180 NW 47th St, Northport, NY 12004, New York, United States [Clear]

Enter a Different Address

Click OK

OK Cancel

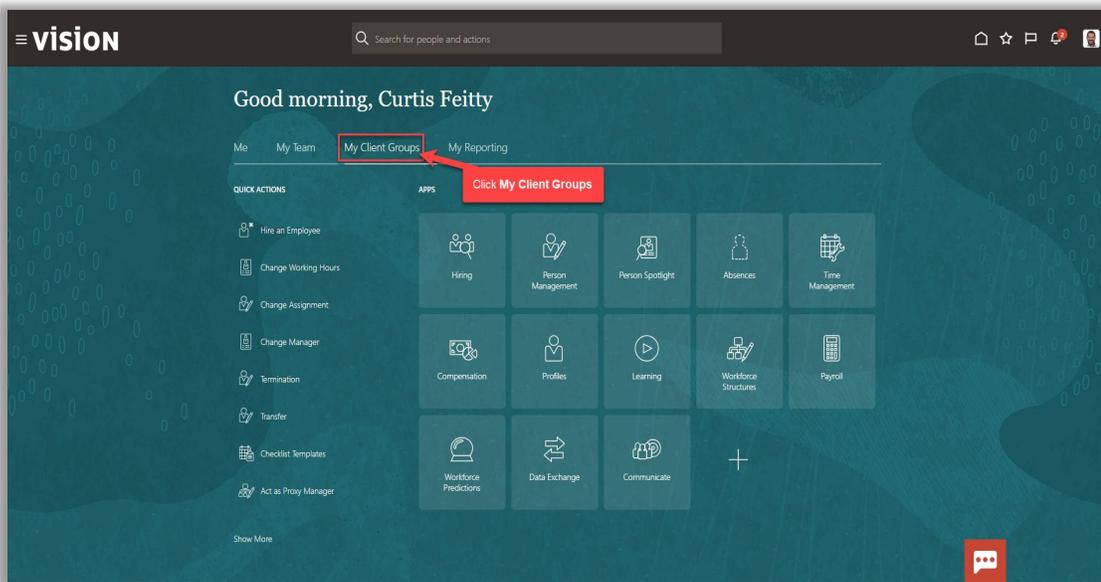
Click **Submit**



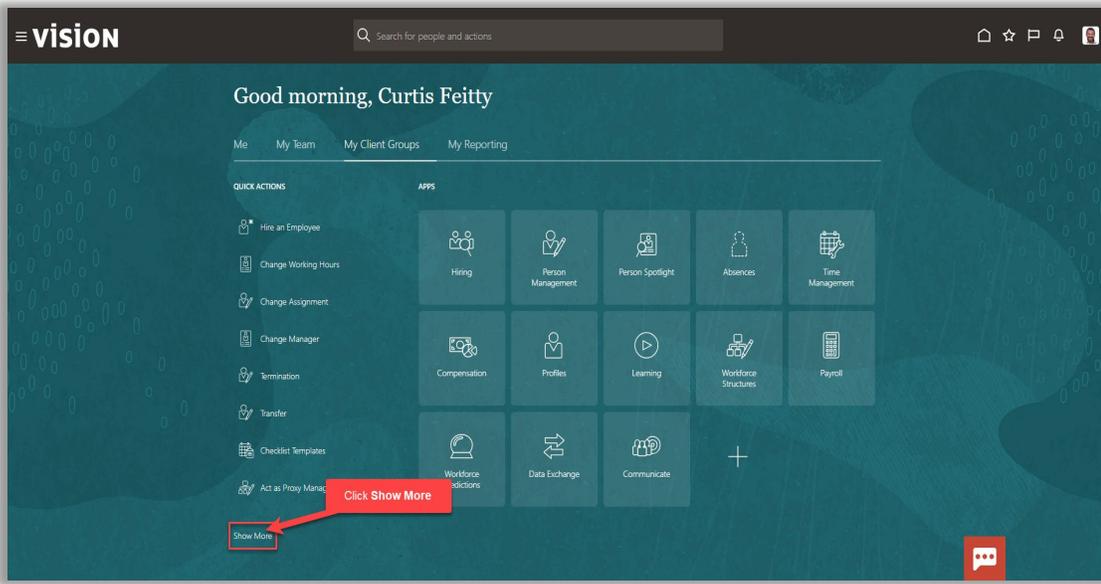
Add Disability Information For An Employee

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

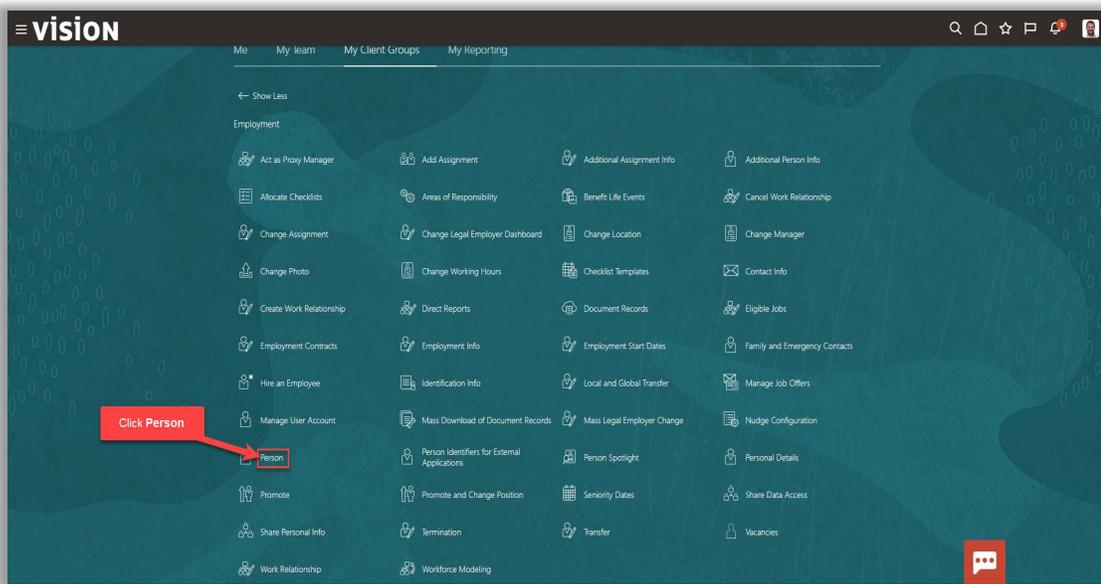
From the home screen, click **My Client Groups**



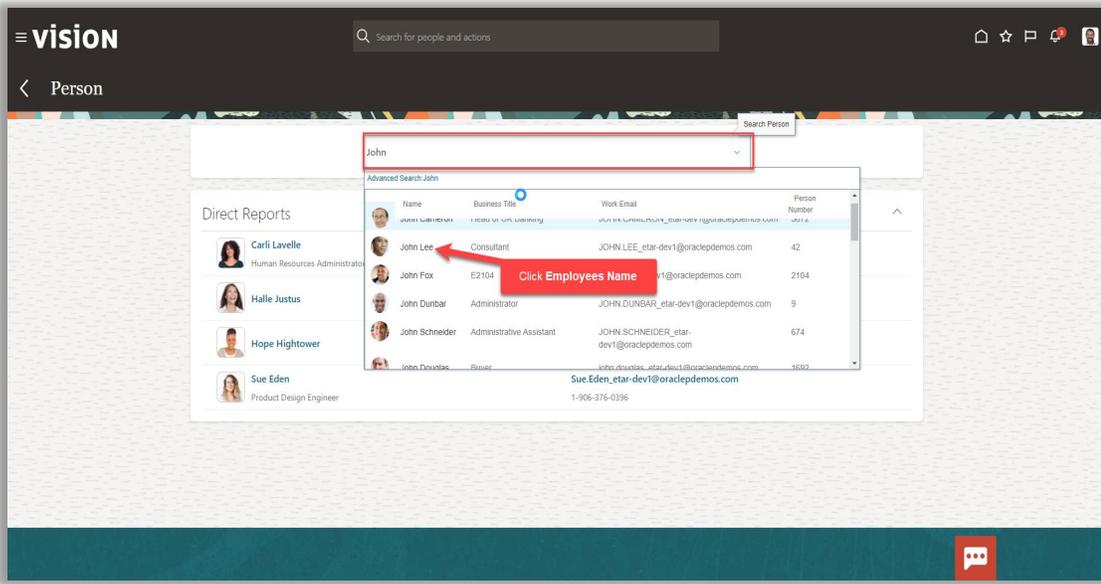
Next, click **Show More**



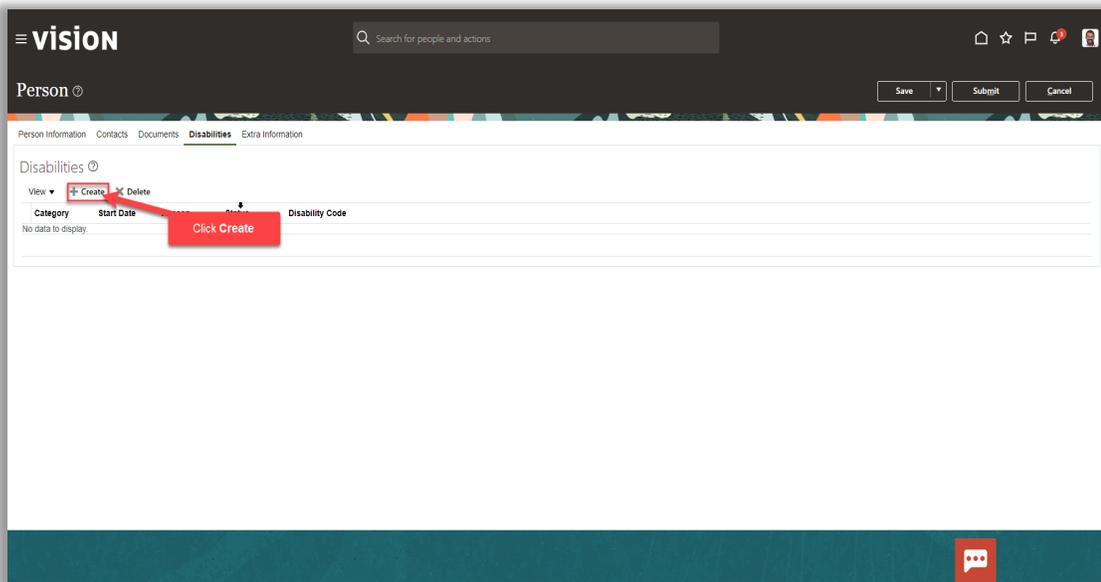
Scroll down and under **Employment**, click **Person**. As a note, we can search **Person** by clicking Ctrl F



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



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**



Enter the information and click **OK**

Enter the below information

Disability Code: 300000275287789

* Effective Start Date: 1/18/24

* Country: United States

* Category: Not applicable

* FTE: 1

* Status: Active

Reason: Occupational Incident

Degree:

Self-Disclosed Disability: Yes, I have a disability, or h

Disclosure Date: m/d/y

Reasonable Accommodation Request:

Attachments: None

Registration:

Registration Date: m/d/y

Expiration Date: m/d/y

Disability Organization:

Registration ID:

Descriptive information: Description, Work Restrictions

Click OK

Click Submit

Person Information Contacts Documents **Disabilities** Extra Information

Disabilities

View Create Delete

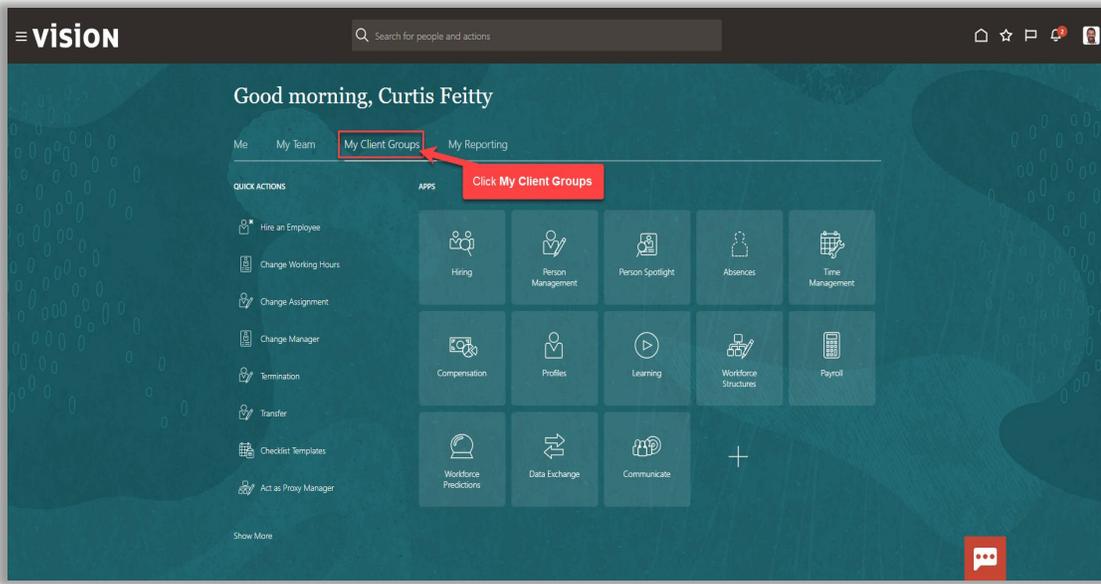
Category	Start Date	Reason	Status	Disability Code
Not applicable	1/18/24	Occupational...	Active	300000275287789

Click Submit

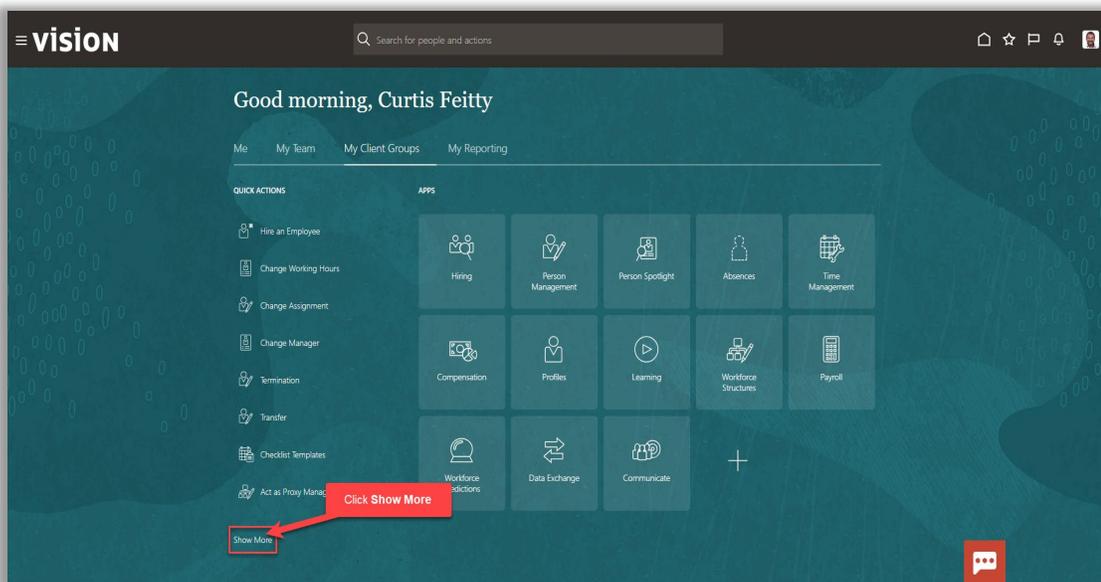
Add or View Employee Documents

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

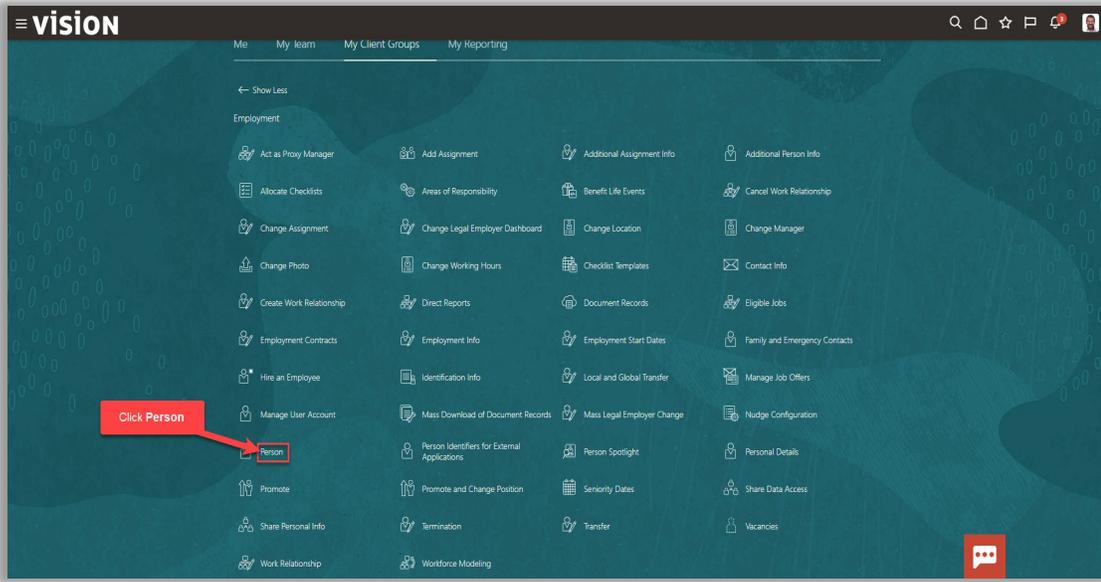
From the home screen, click **My Client Groups**



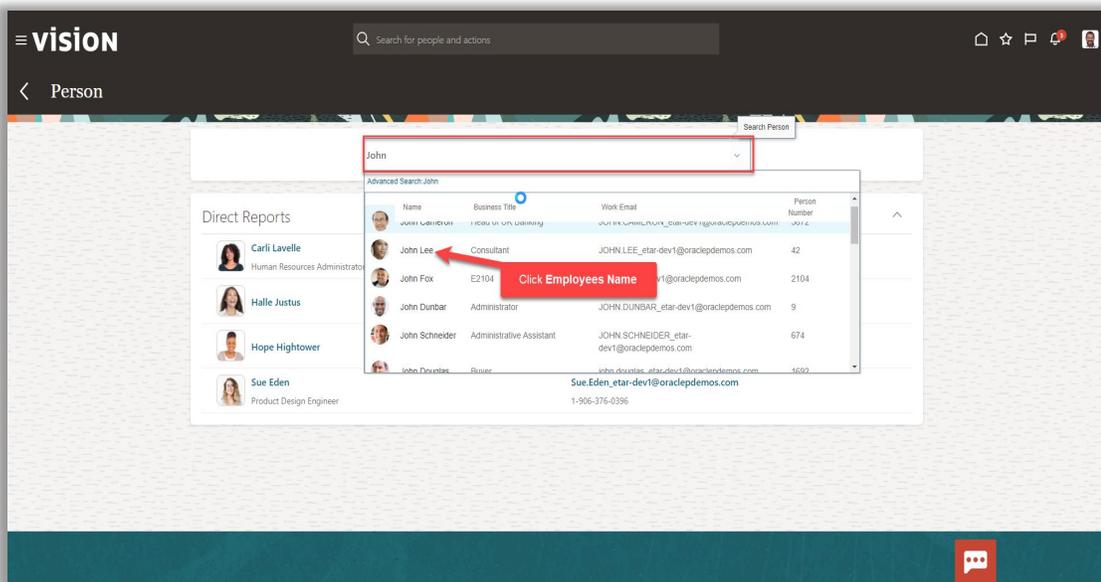
Next, click **Show More**



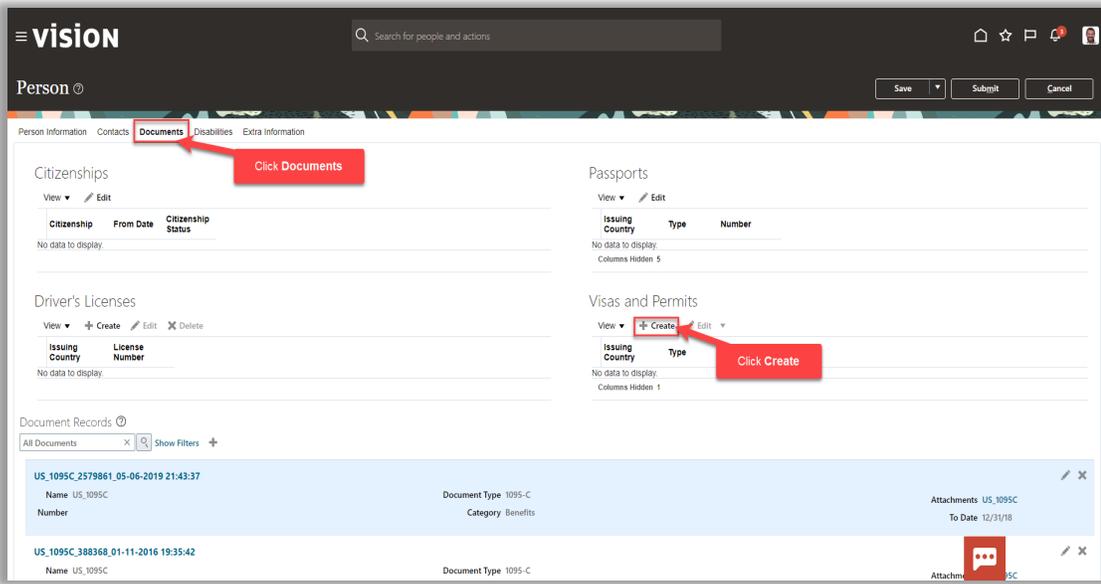
Scroll down and under **Employment**, click **Person**. As a note, we can search **Person** by clicking Ctrl F



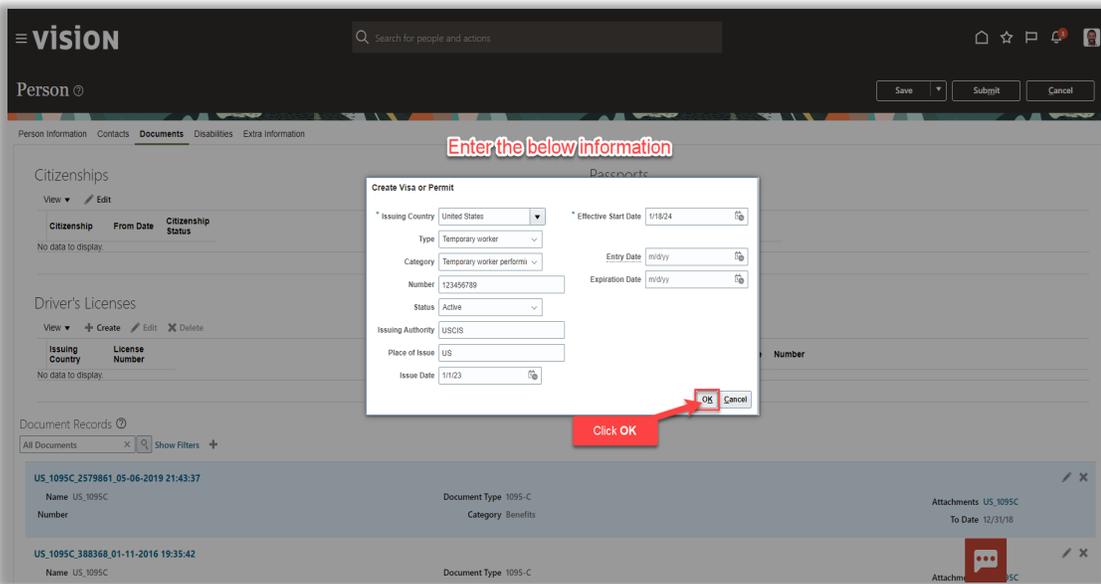
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



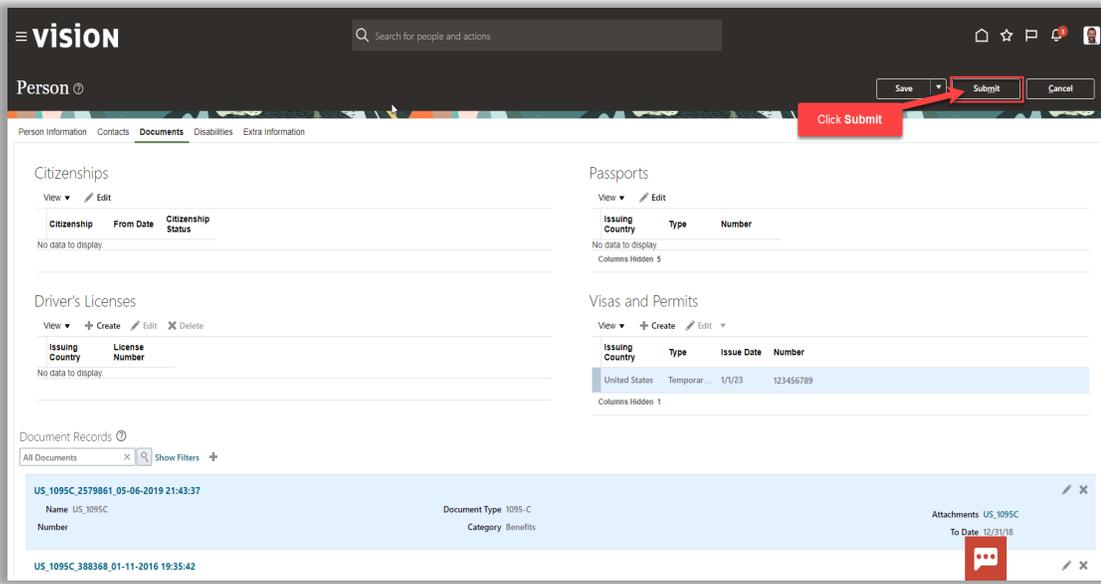
Select the **Documents** tab to manage the employee's Citizenship, Passports, Driver's License, Visas and Permits. Here we can view employees existing Citizenship Status, or we can create a new status. To create a new status, click **Create**



Enter the information and click OK



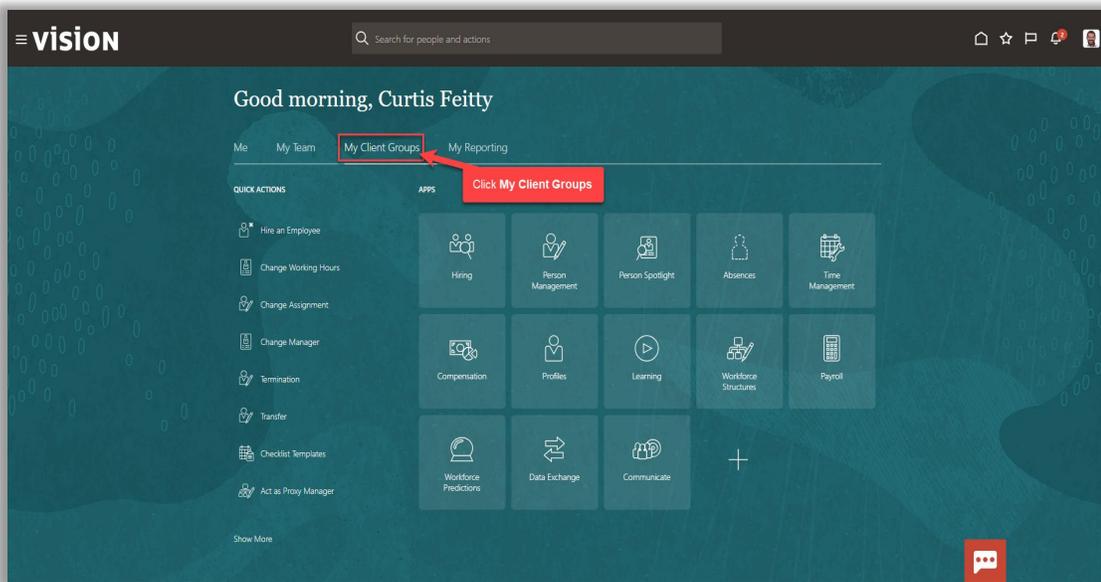
Click Submit



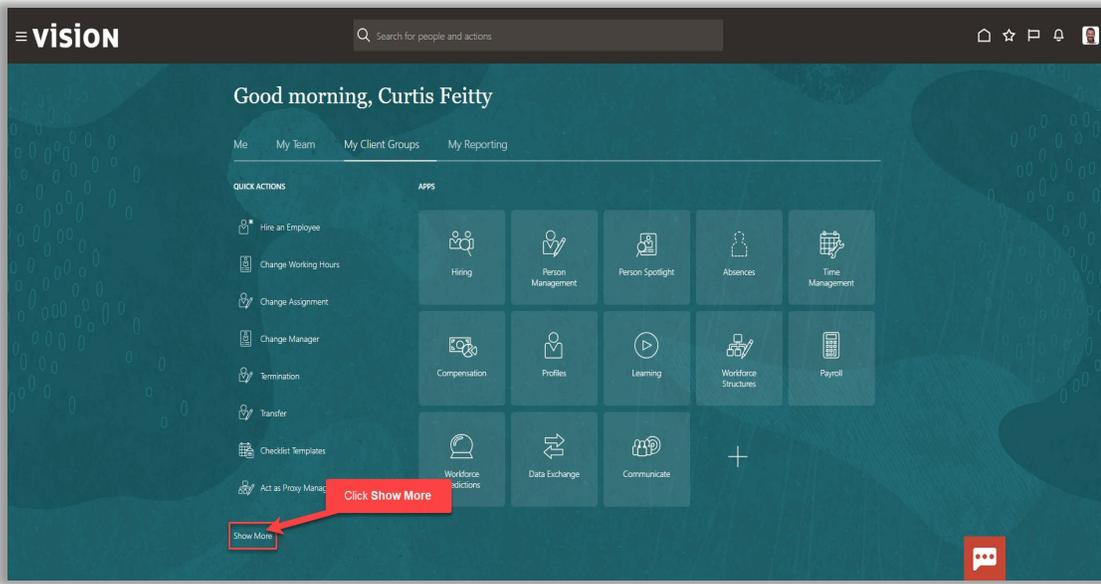
View Employment Details

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

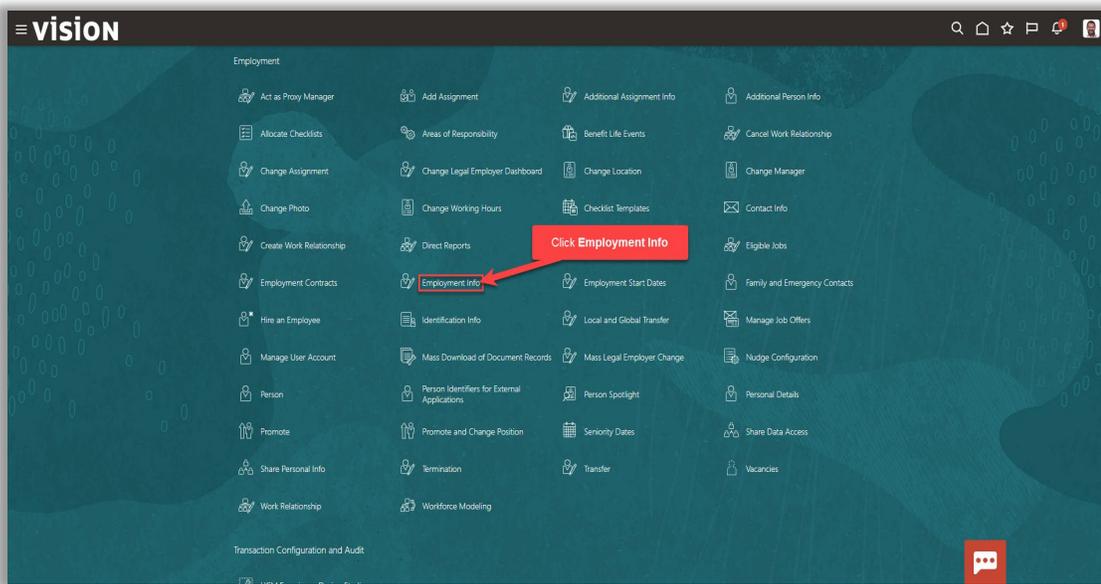
From the home screen, click **My Client Groups**



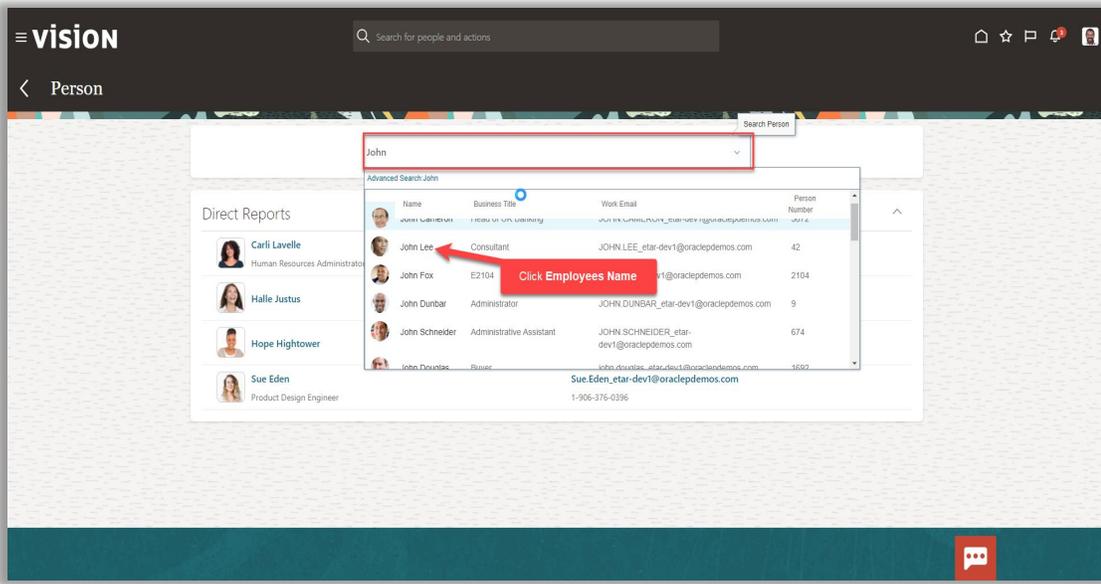
Next, click **Show More**



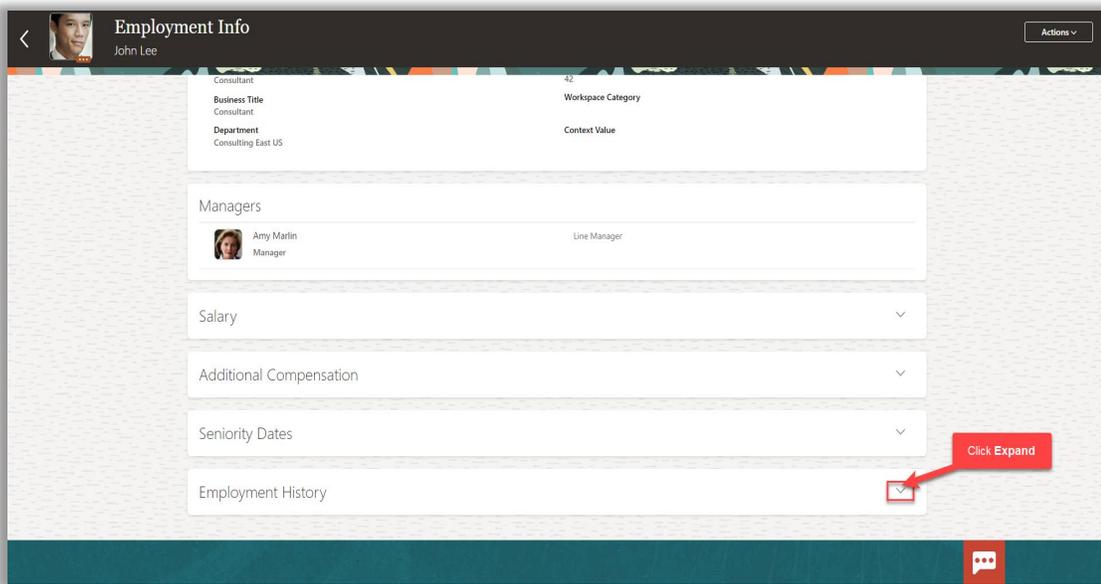
Scroll down and under **Employment**, click **Employment Info**. As a note, we can search **Employment Info** by clicking Ctrl F



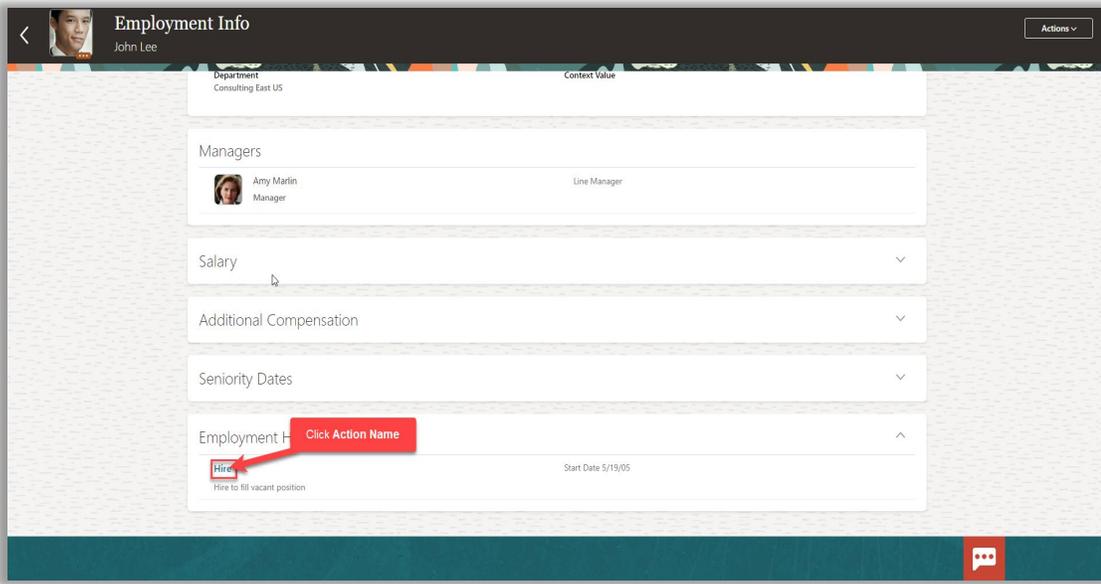
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



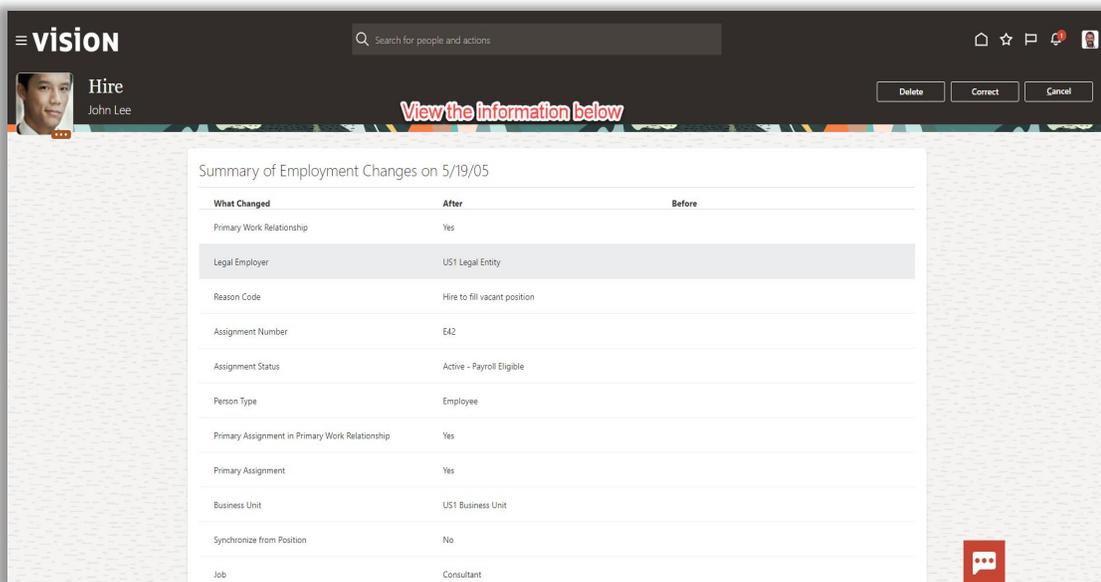
We can expand each section to review the information. Scroll down to view **Employment Information**.



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



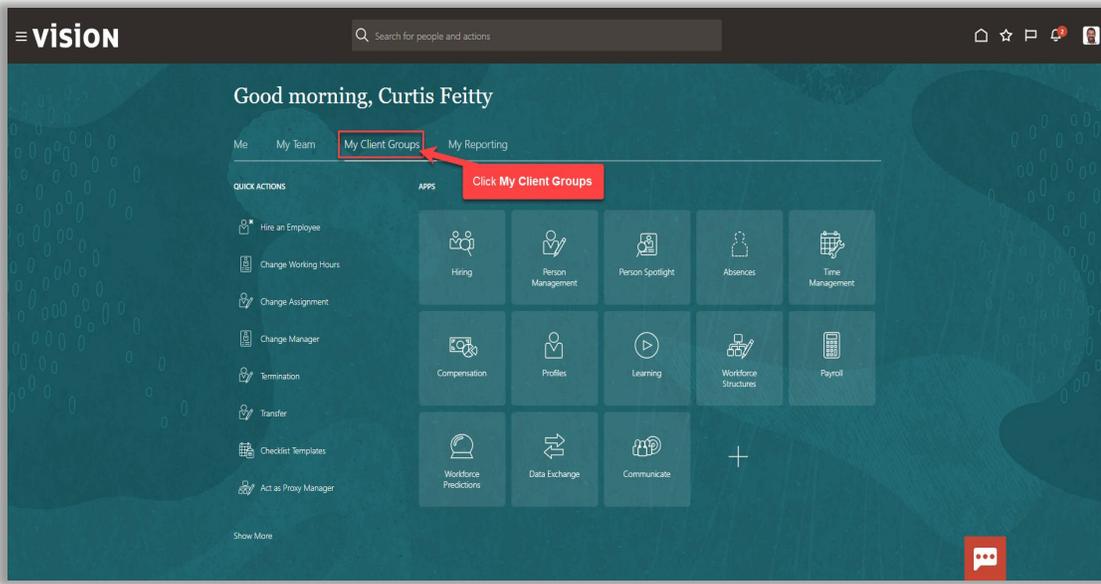
We can now view the details associated to this Action



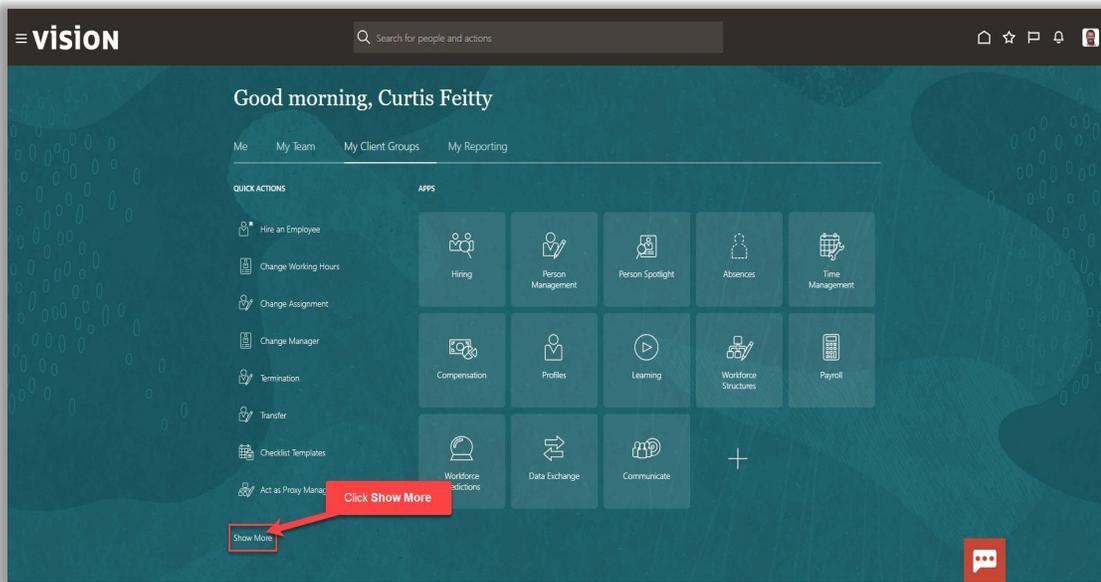
Update Salary

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

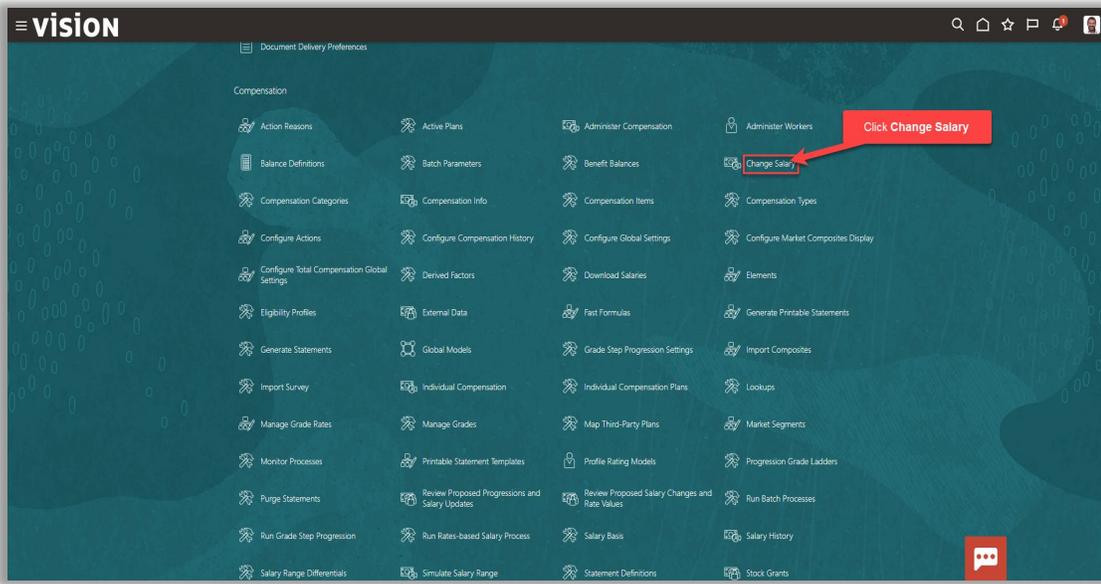
From the home screen, click **My Client Groups**



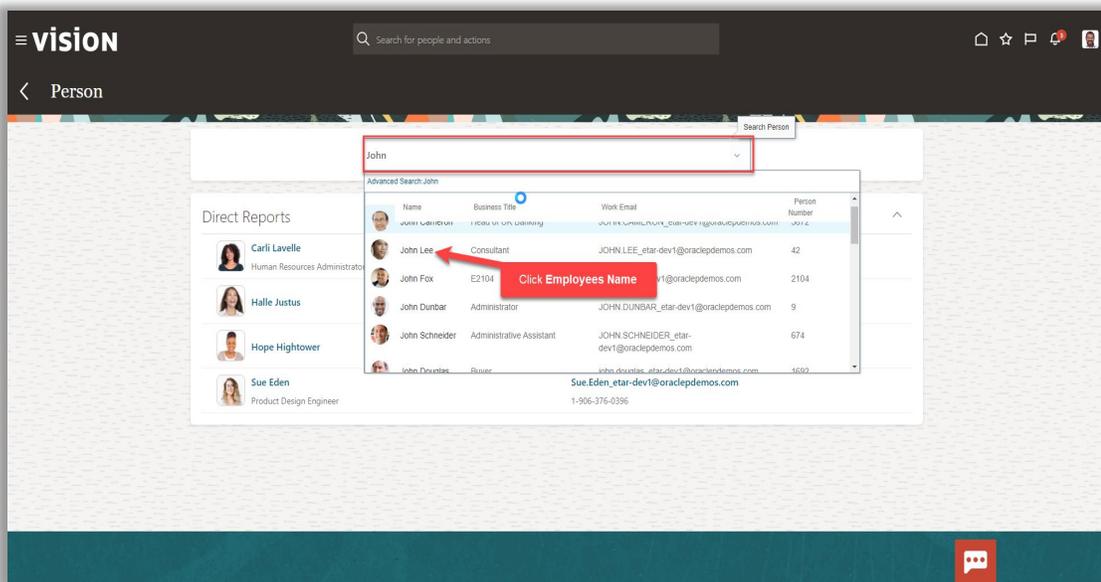
Next, click **Show More**



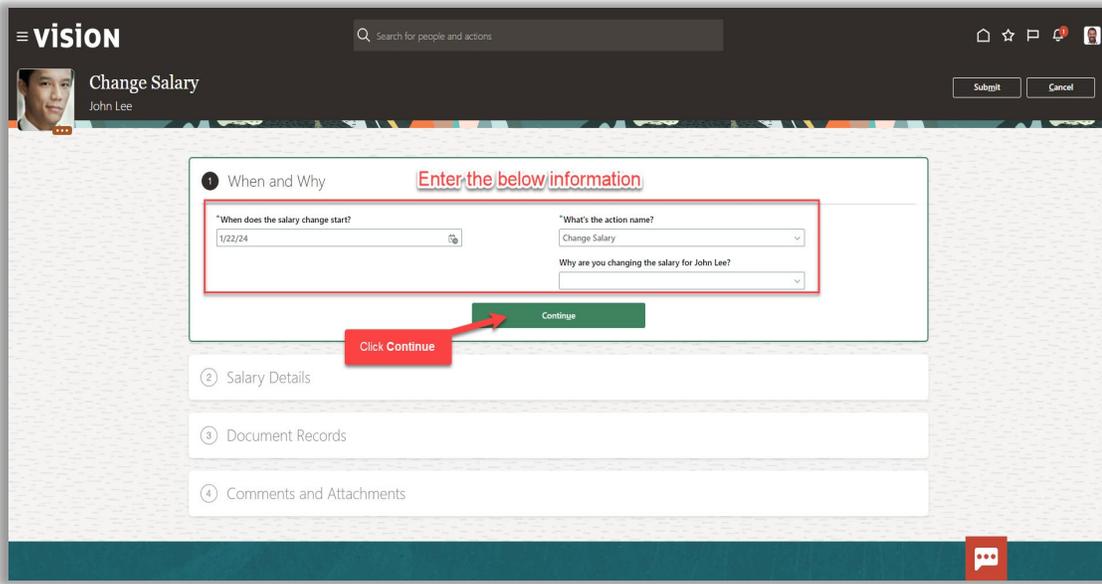
Scroll down and under **Compensation**, click **Change Salary**. As a note, we can search **Change Salary** by clicking Ctrl F



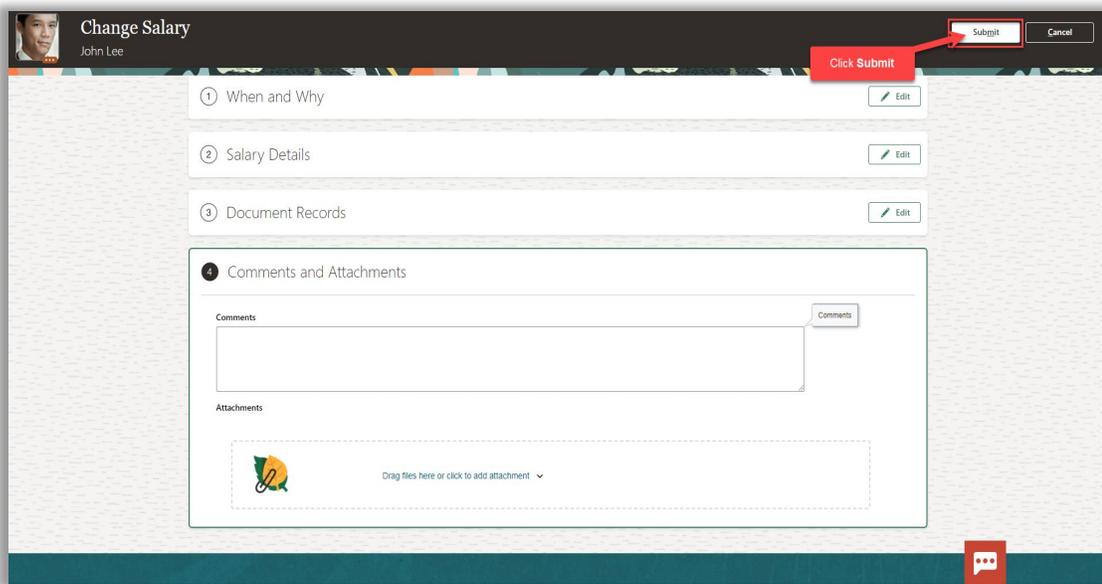
Enter the employees name in **Search for a Person** box, once the employees' name is shown, click the employees' name



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



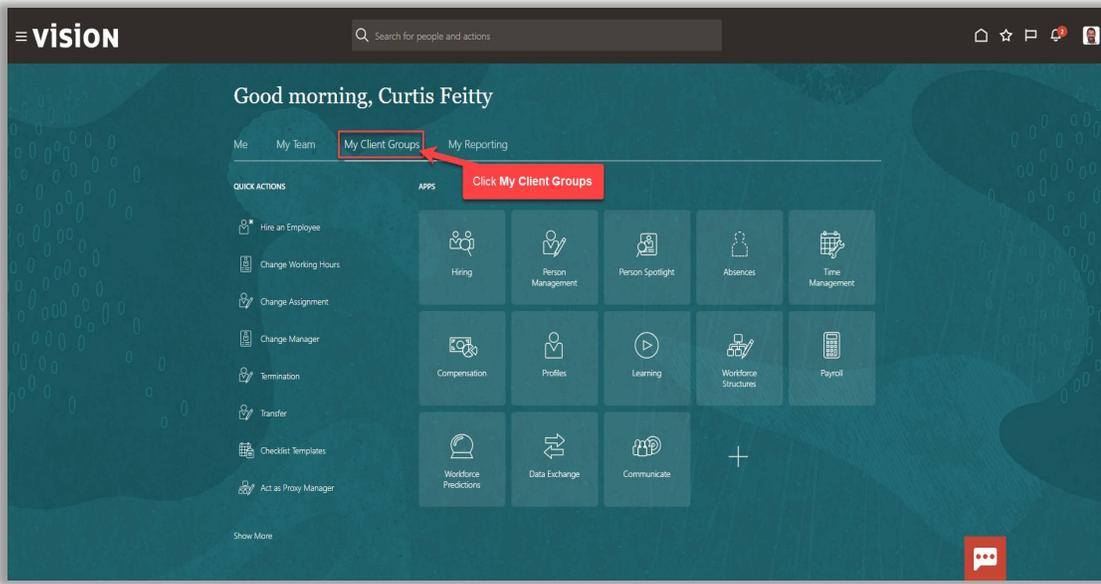
Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The salary change for this employee has been submitted.



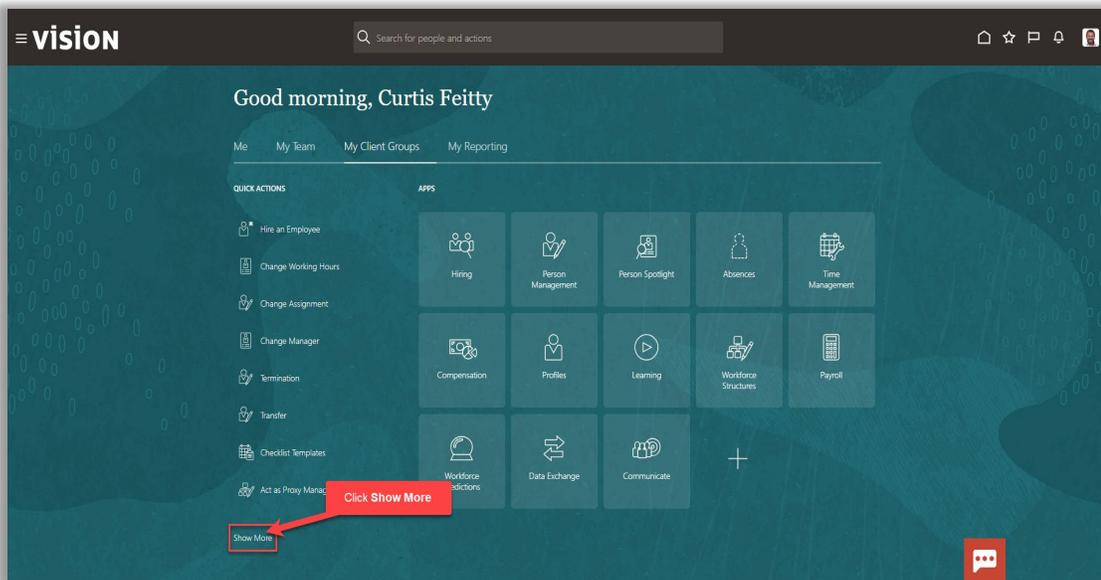
View Salary And Compensation History For An Employee

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

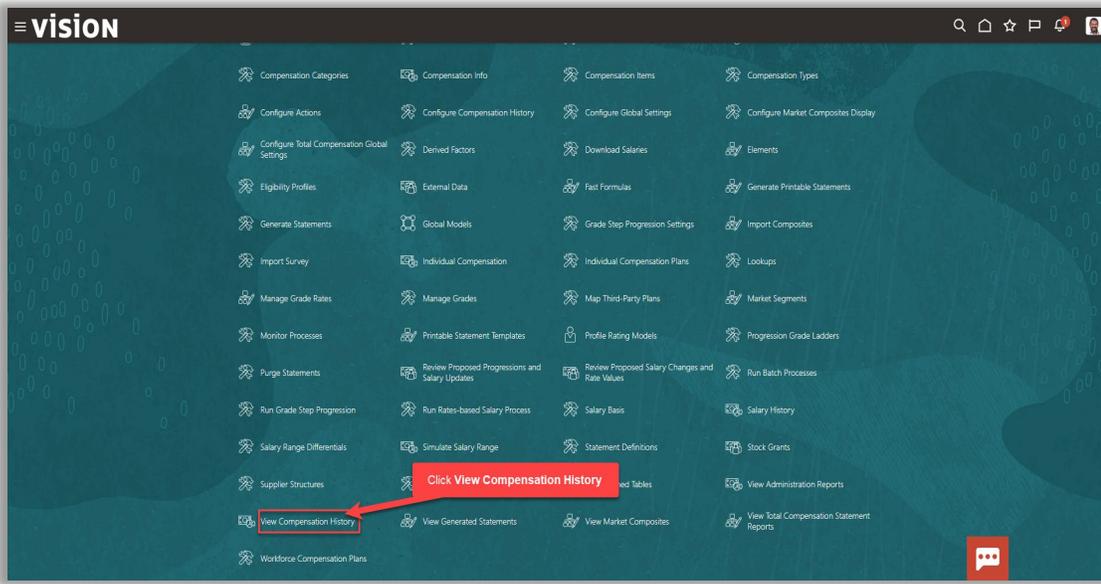
From the home screen, click **My Client Groups**



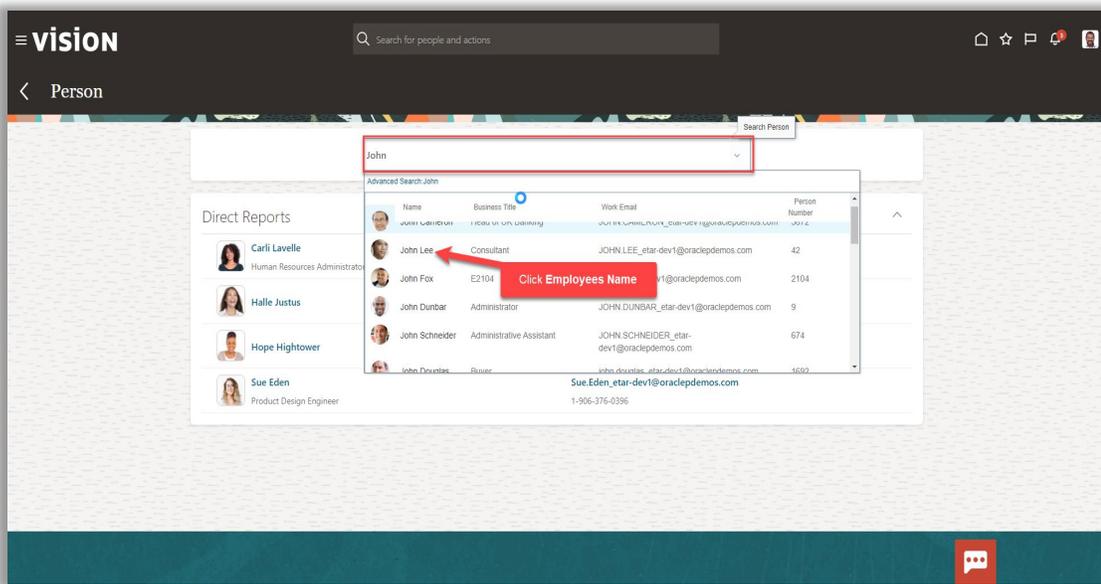
Next, click **Show More**



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



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



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

Currency = US Dollar

View the Compensation history below

Compensation	2024	2023	2022	2021	2020
Salary					
Overall Salary	\$6,000.00	\$6,000.00	\$6,000.00	\$6,000.00	\$6,000.00
Annual Salary	\$6,000.00	\$6,000.00	\$6,000.00	\$6,000.00	\$6,000.00
Percentage Change					
Other Compensation					
Stock					
Recurring Payments					
Rates are as of December 31 of the noted year except current year. The last payment is shown for recurring payments.					

Change Working Hours

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

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

Good morning, Curtis Feitty

Me My Team **My Client Groups** My Reporting

QUICK ACTIONS

- Hire an Employee
- Change Working Hours
- Change Assignment
- Change Manager
- Termination
- Transfer
- Checklist Templates
- Act as Proxy Manager

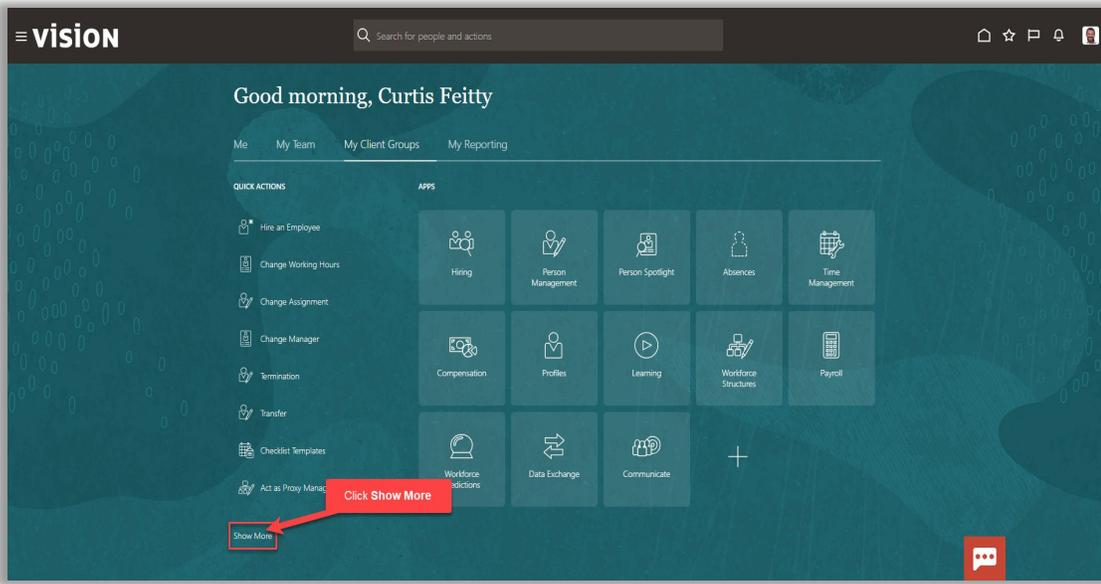
APPS

- Hiring
- Person Management
- Person Spotlight
- Absences
- Time Management
- Compensation
- Profiles
- Learning
- Workforce Structures
- Payroll
- Workforce Predictions
- Data Exchange
- Communicate

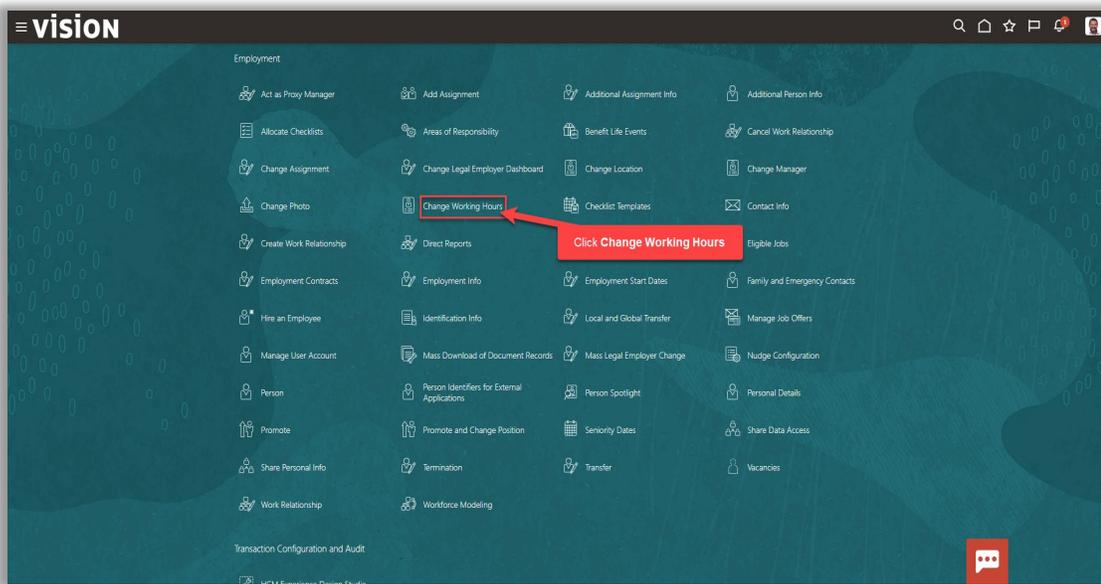
Show More

Click My Client Groups

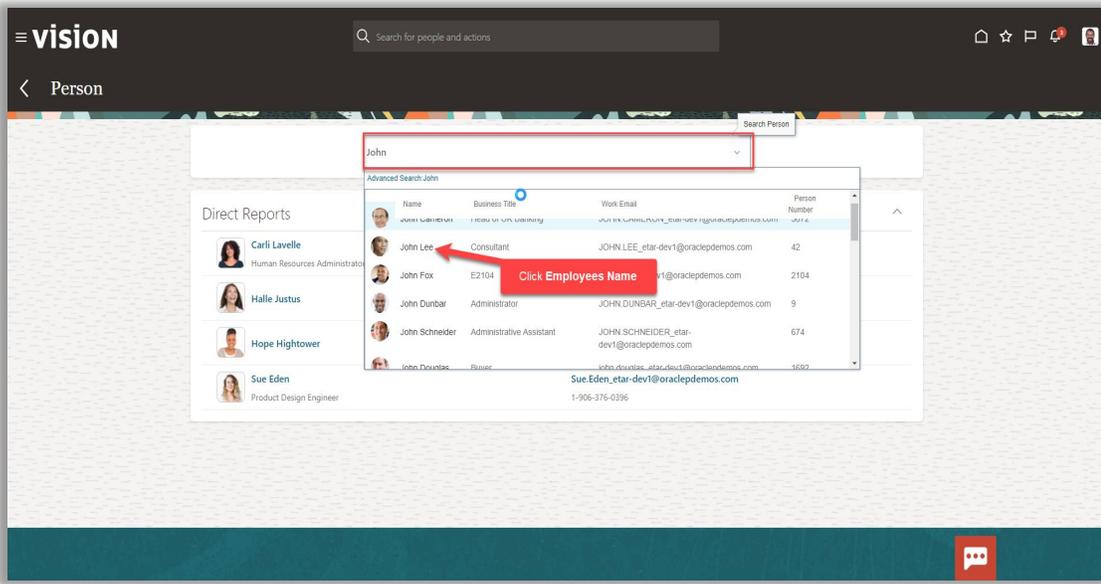
Next, click **Show More**



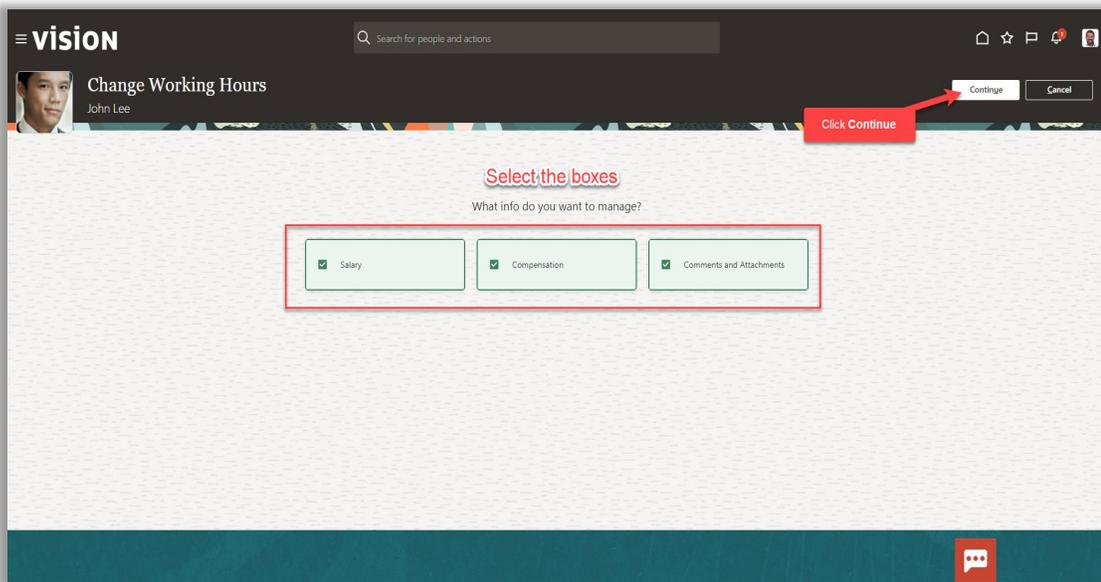
Scroll down and under **Employment**, click **Change Working Hours**. As a note, we can search **Change Working Hours** by clicking Ctrl F



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



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**



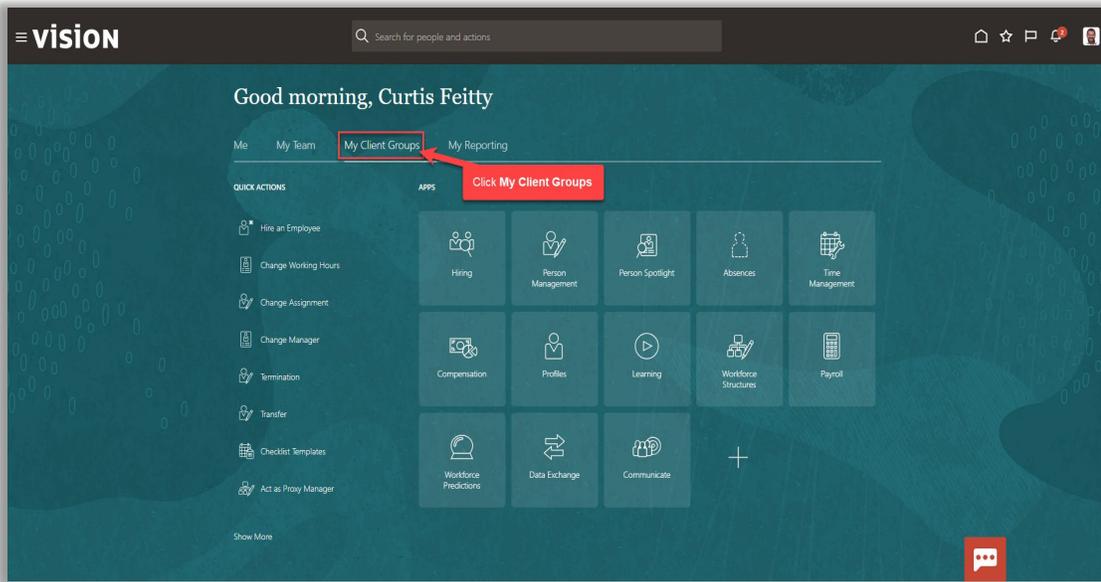
Enter the information in the **When and Why** section then, click **Continue**

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.

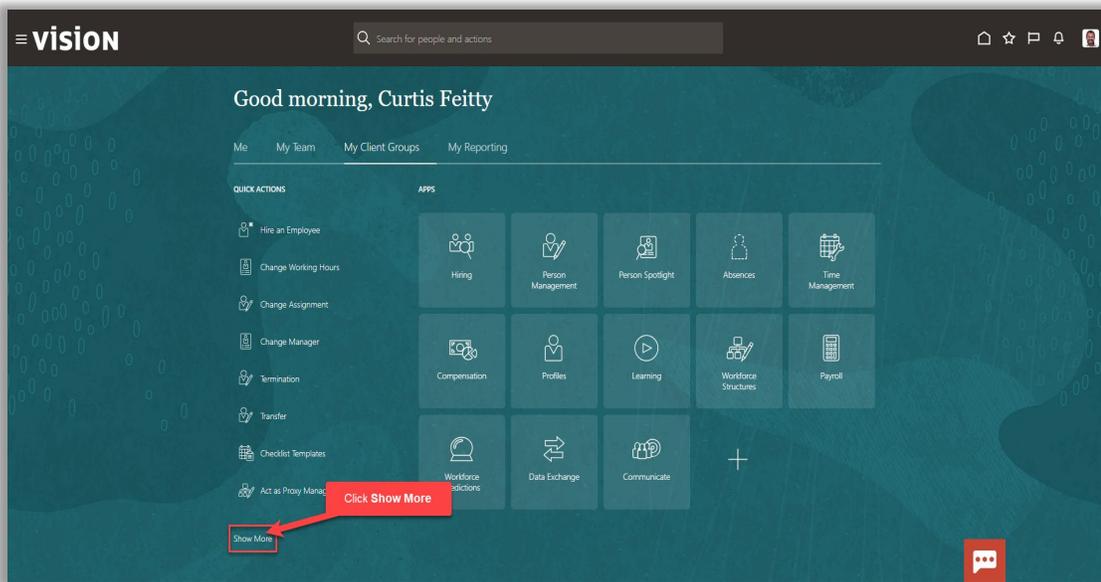
Manage Line Managers For Employees

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

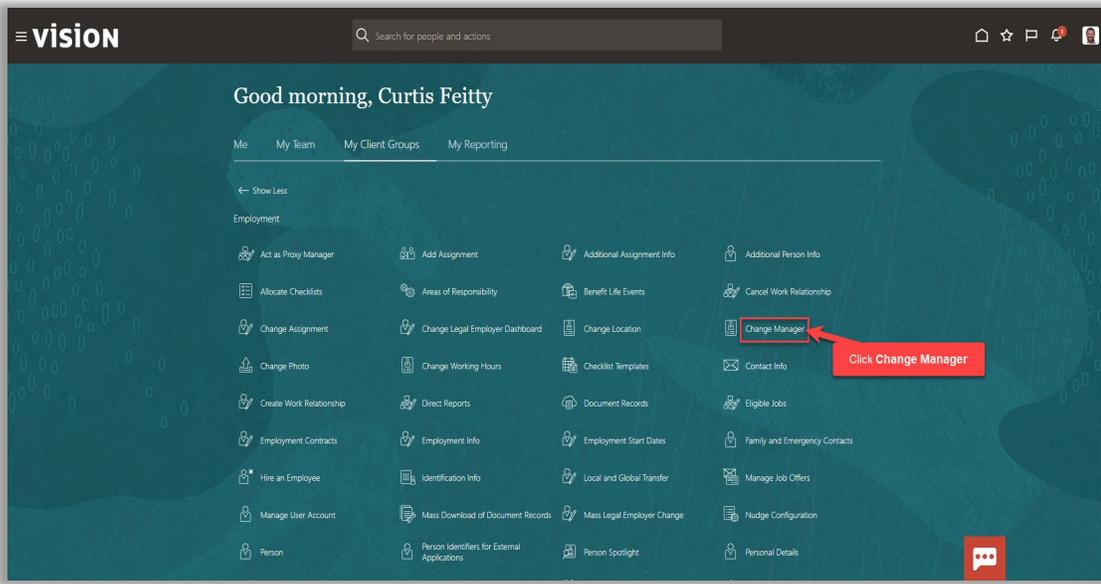
From the home screen, click **My Client Groups**



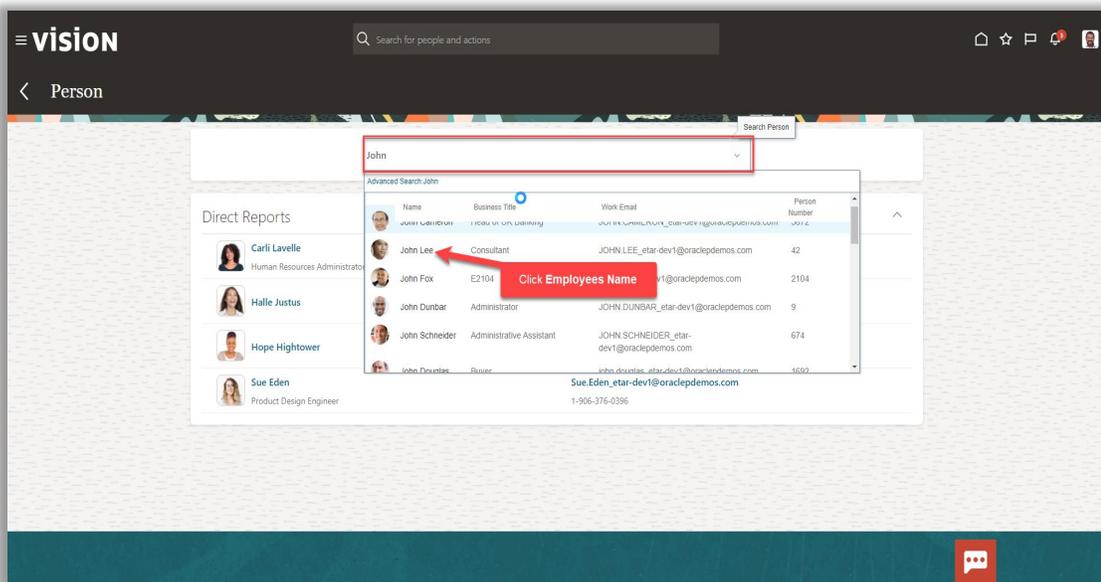
Next, click **Show More**



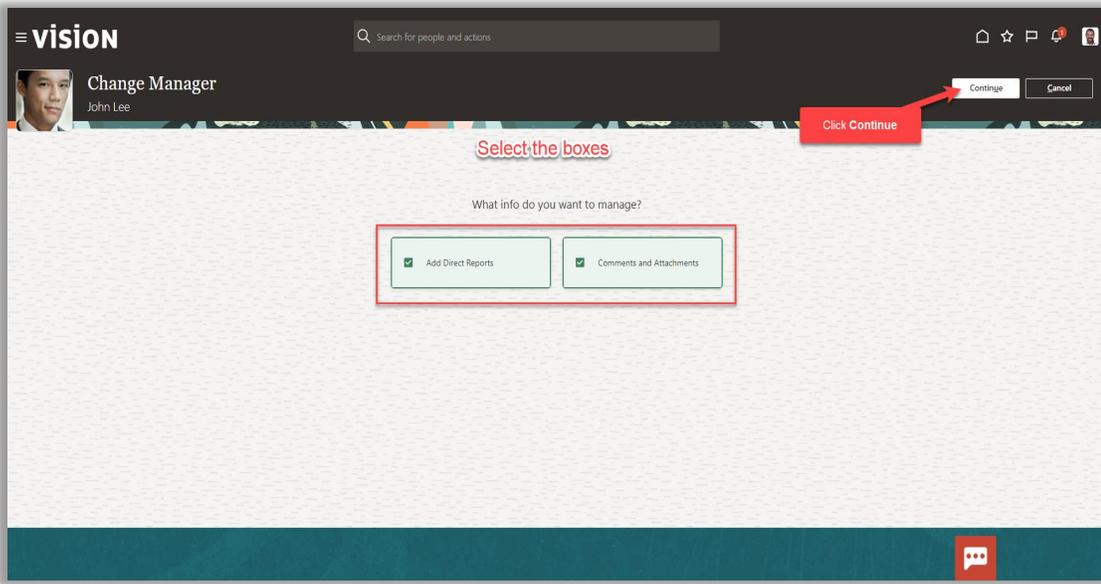
Scroll down and under **Employment**, click **Change Manager**. As a note, we can search **Change Manager** by clicking Ctrl F



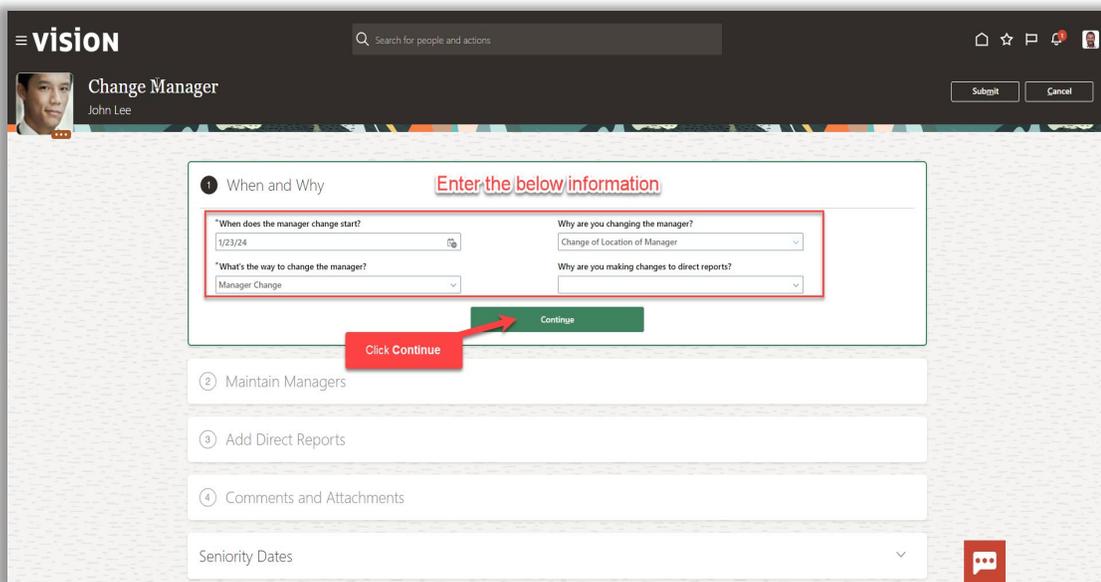
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



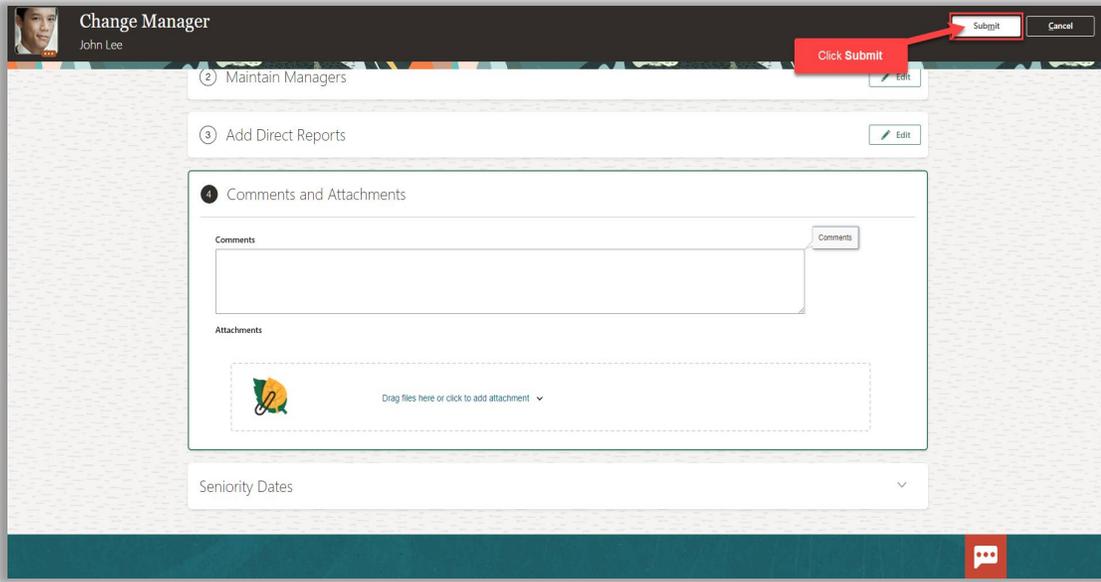
From the **Change Manager** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by our team. Click **Continue**



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



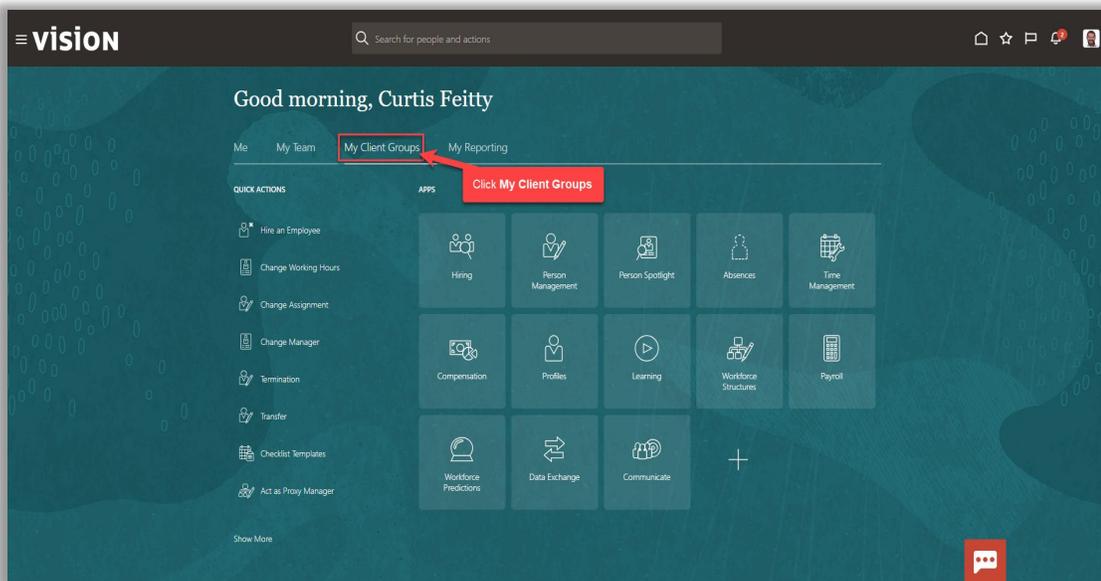
Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The manager change for this employee has been updated.



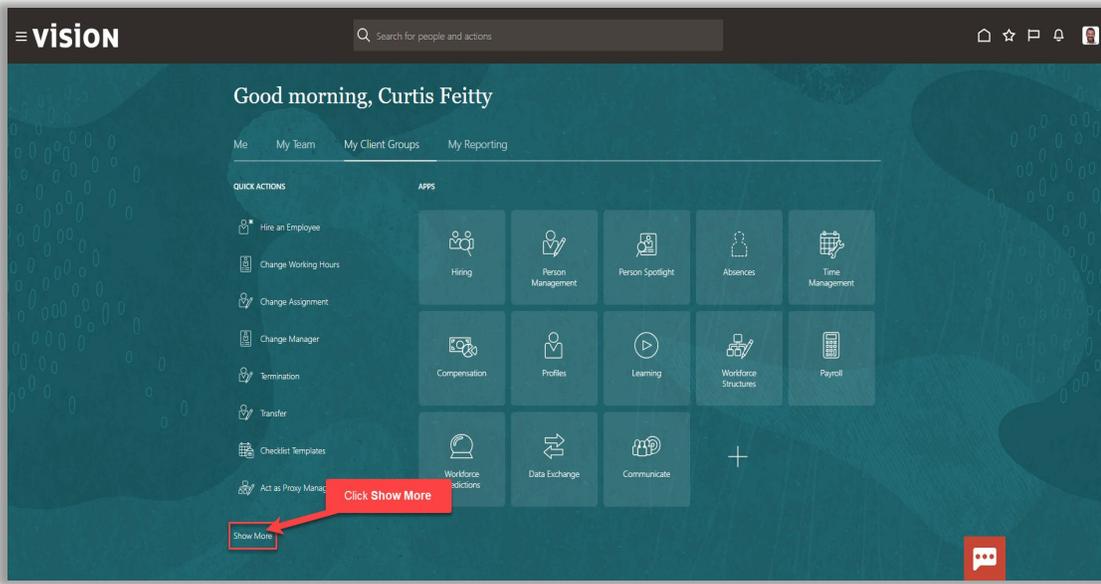
Manage Direct Reports

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

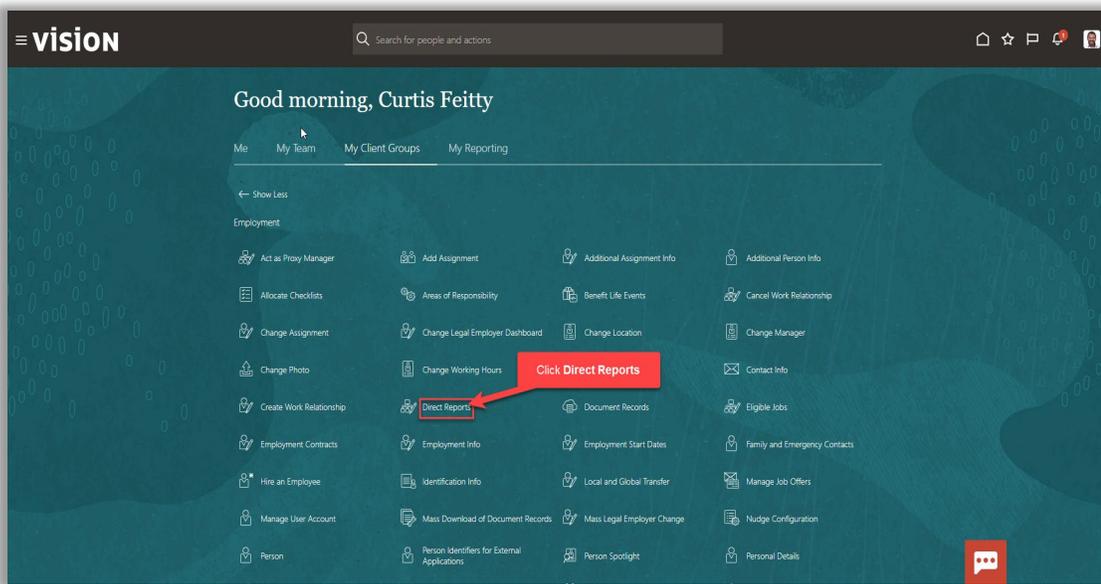
From the home screen, click **My Client Groups**



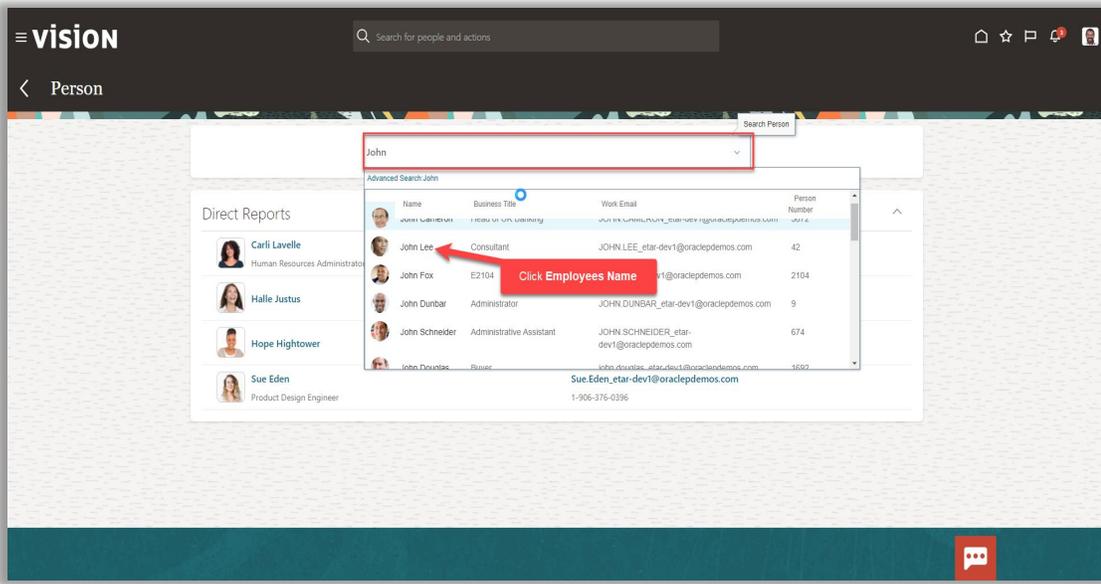
Next, click **Show More**



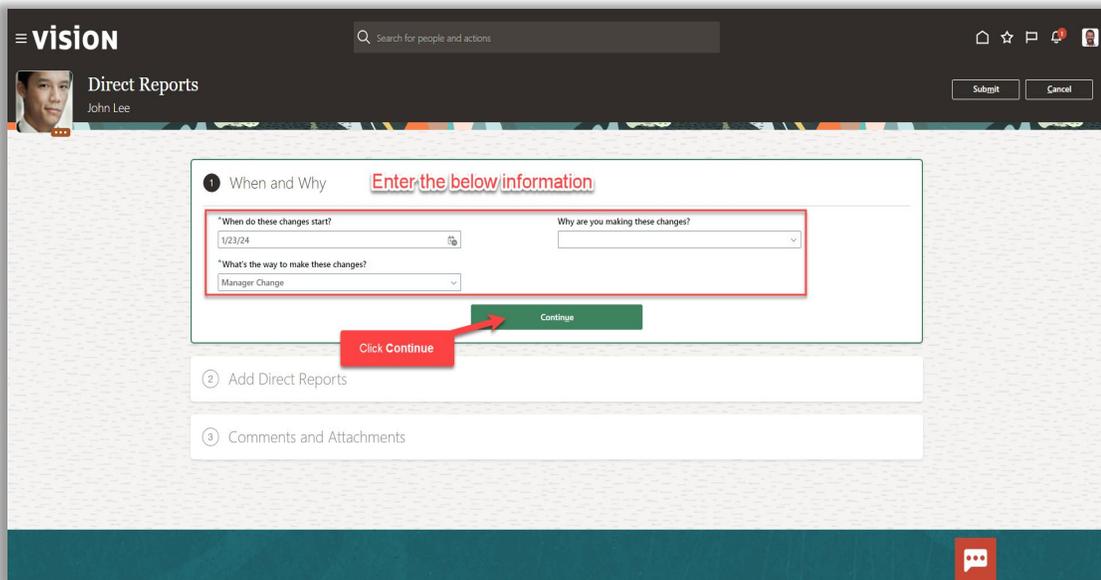
Scroll down and under **Employment**, click **Direct Reports**. As a note, we can search **Direct Reports** by clicking **Ctrl F**



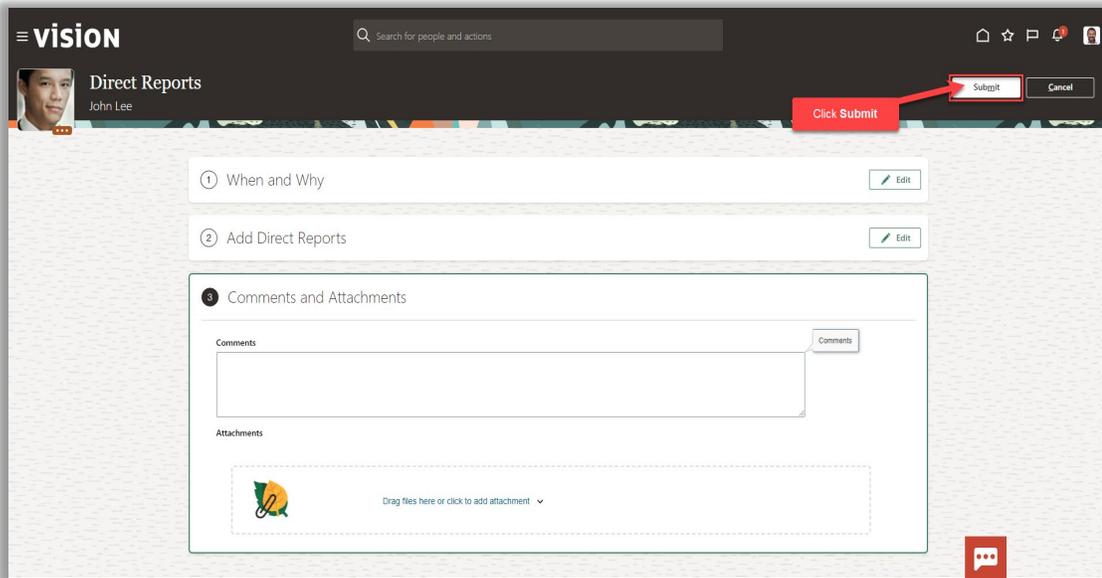
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



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



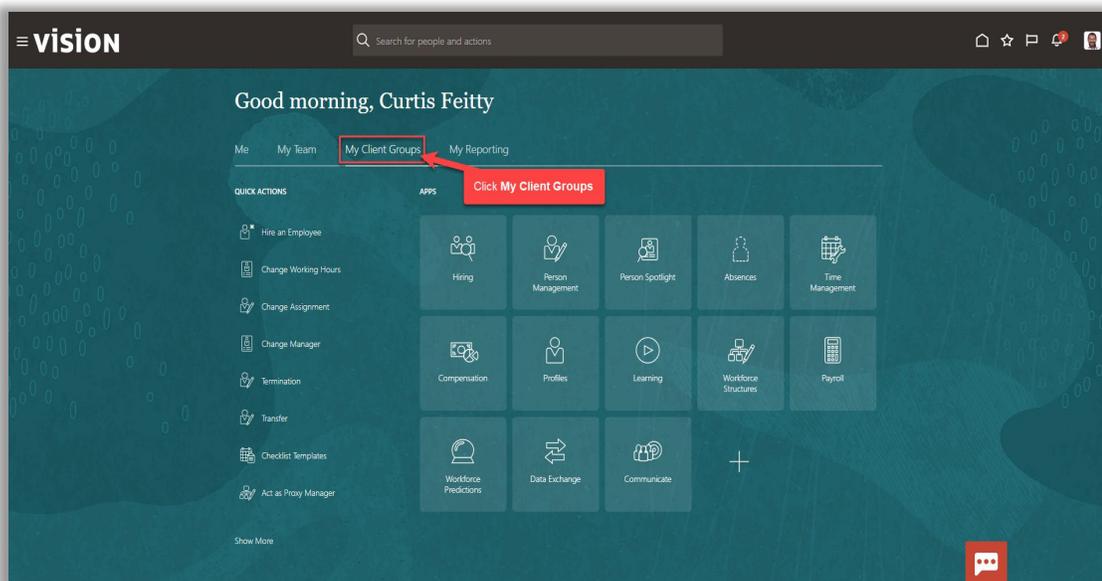
Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The direct report updates for this employee have been updated.



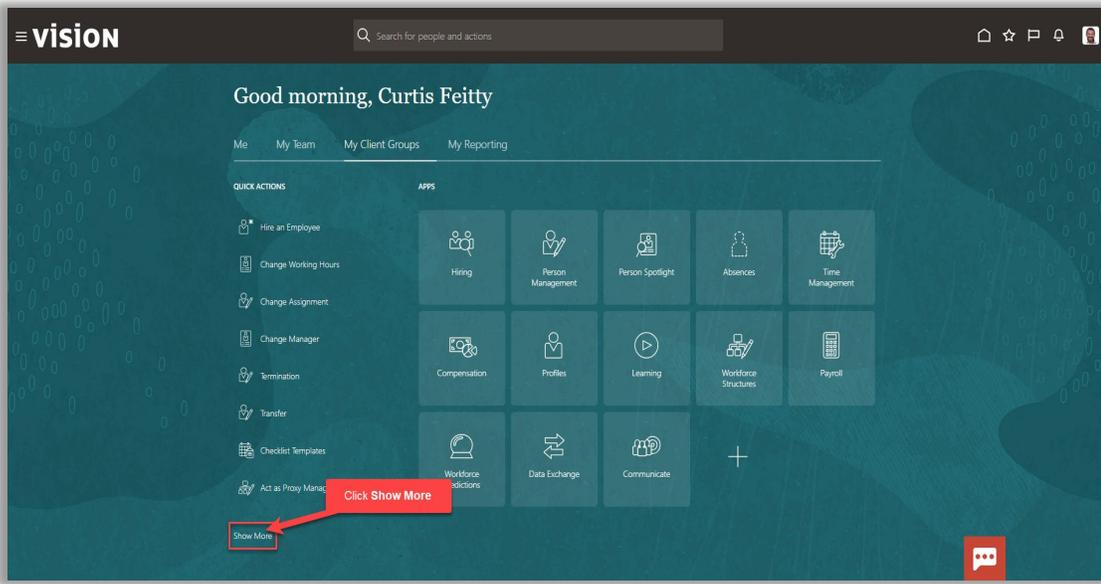
Cancel A Work Relationship

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

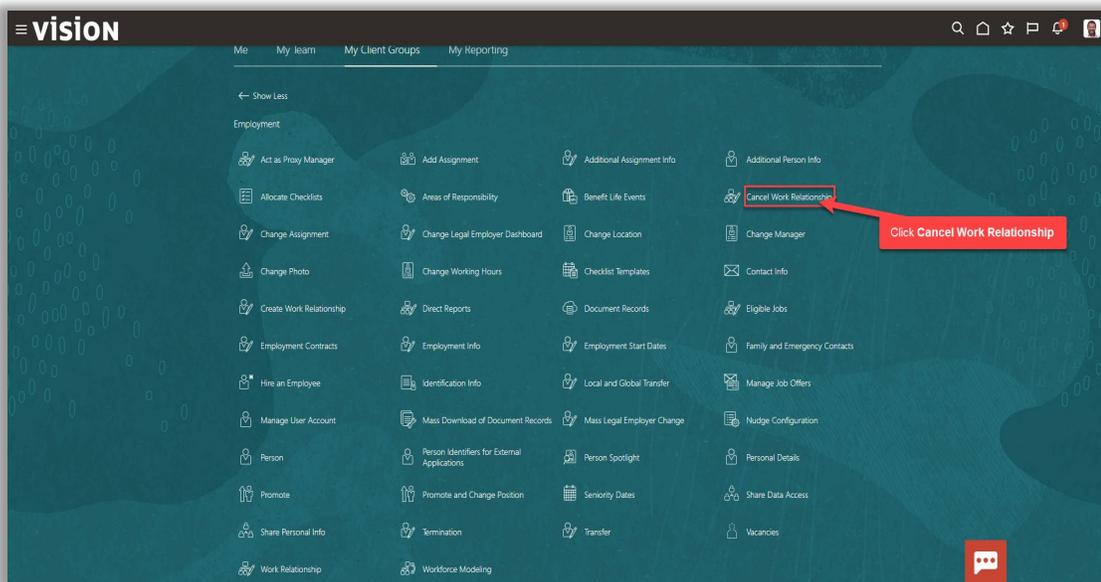
From the home screen, click **My Client Groups**



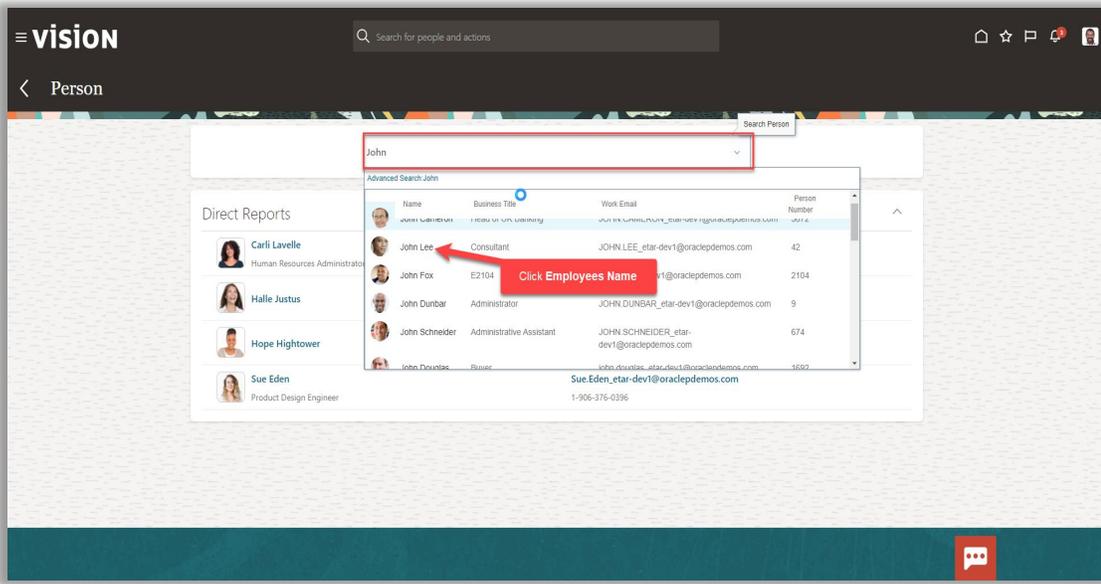
Next, click **Show More**



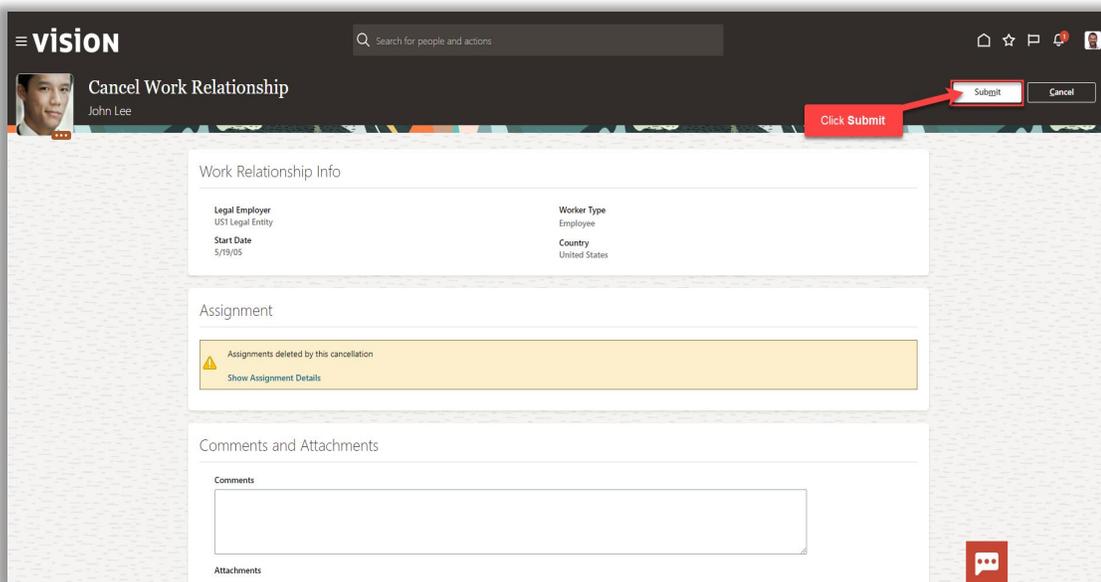
Scroll down and under **Employment**, click **Cancel Work Relationship**. As a note, we can search **Cancel Work Relationship** by clicking Ctrl F



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



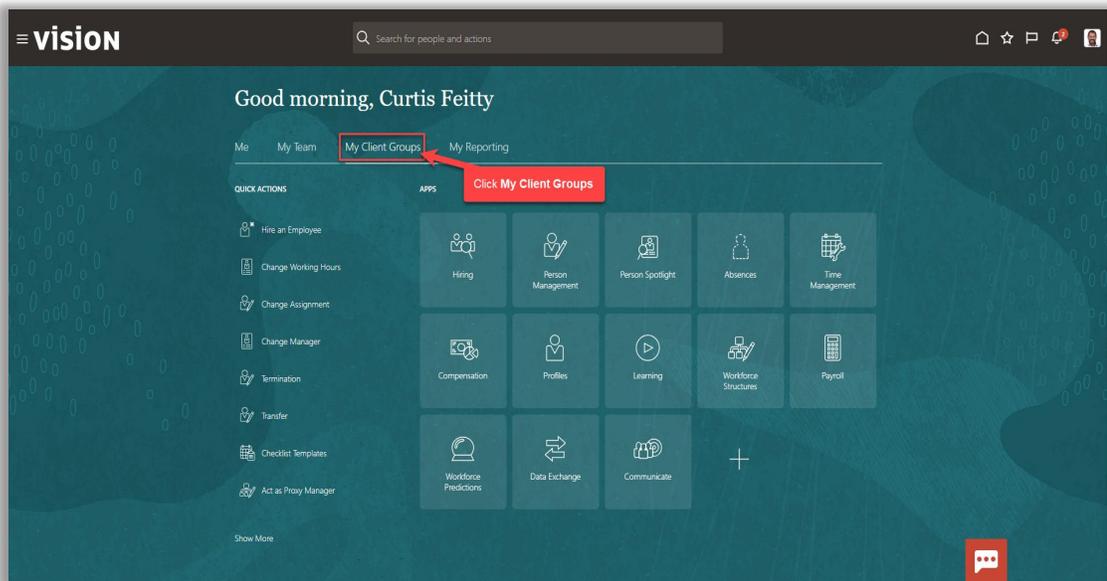
From the **Cancel Work Relationship** screen, review the **Work Relationship Info** and the **Assignment** details. As a note, if an employee has performed work for our organization, use the **Termination** quick action. If this employee has not performed work for our organization but was added into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



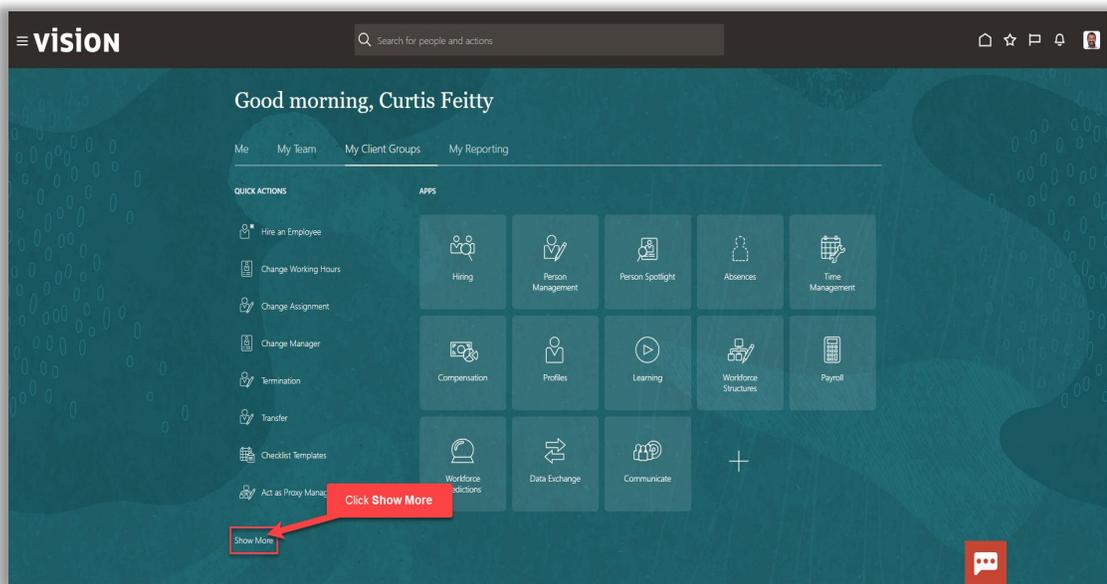
Rehire An Employee

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

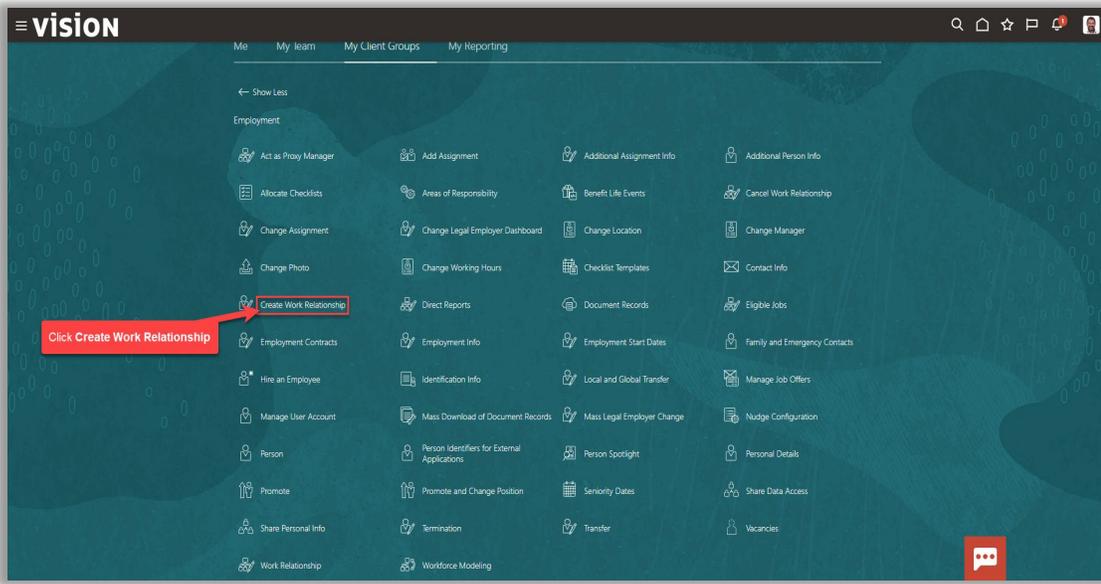
From the home screen, click **My Client Groups**



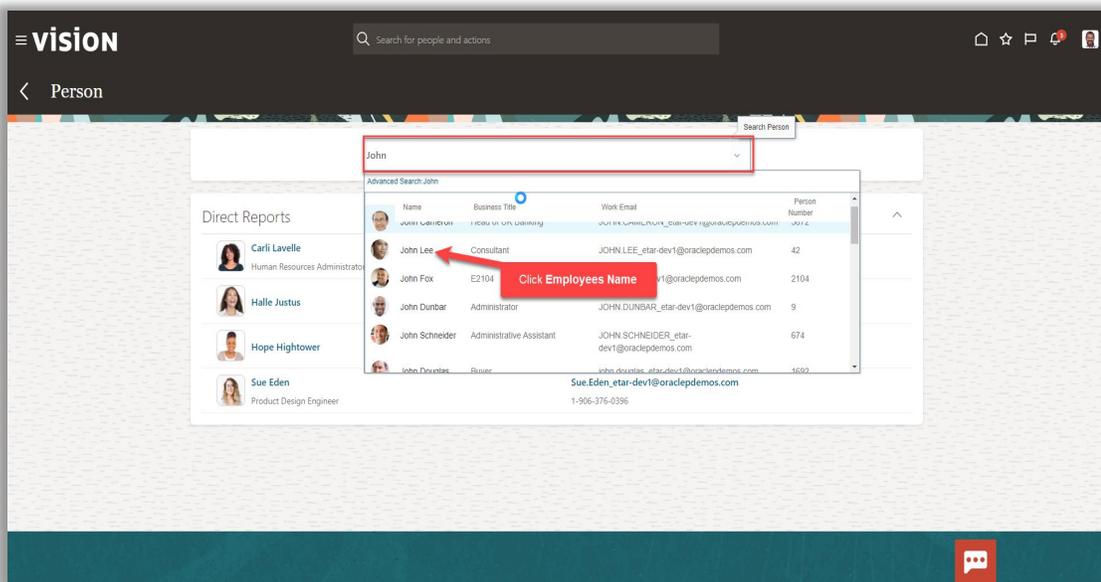
Next, click **Show More**



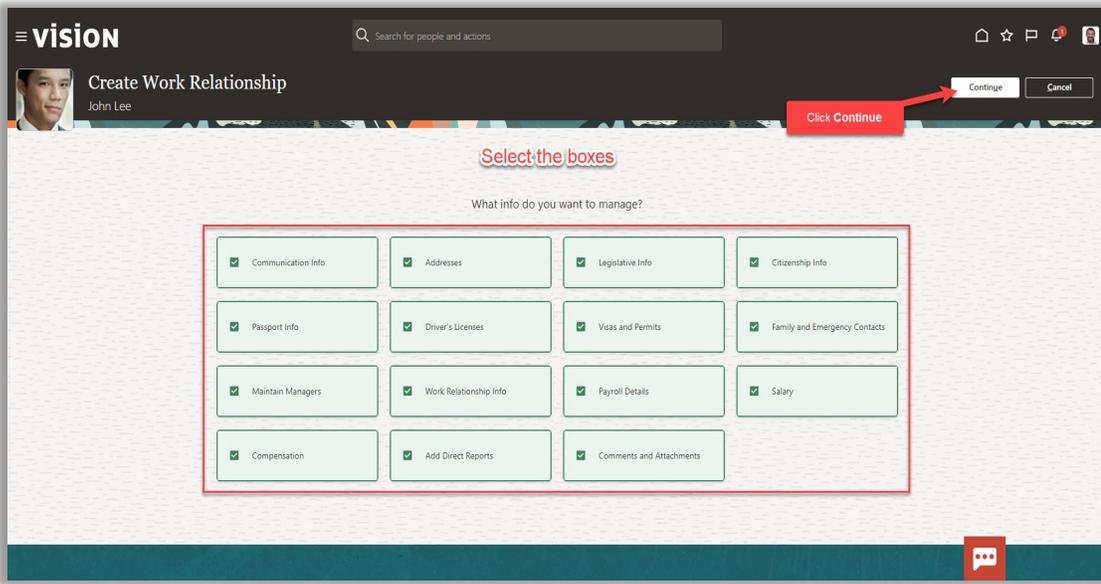
Scroll down and under **Employment**, click **Create Work Relationship**. As a note, we can search **Create Work Relationship** by clicking Ctrl F



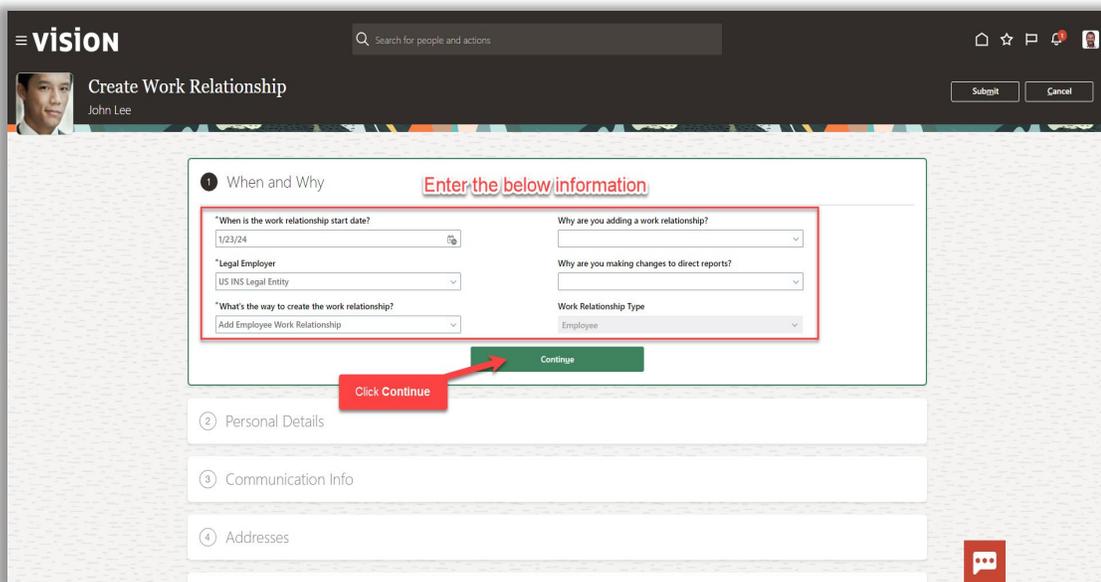
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



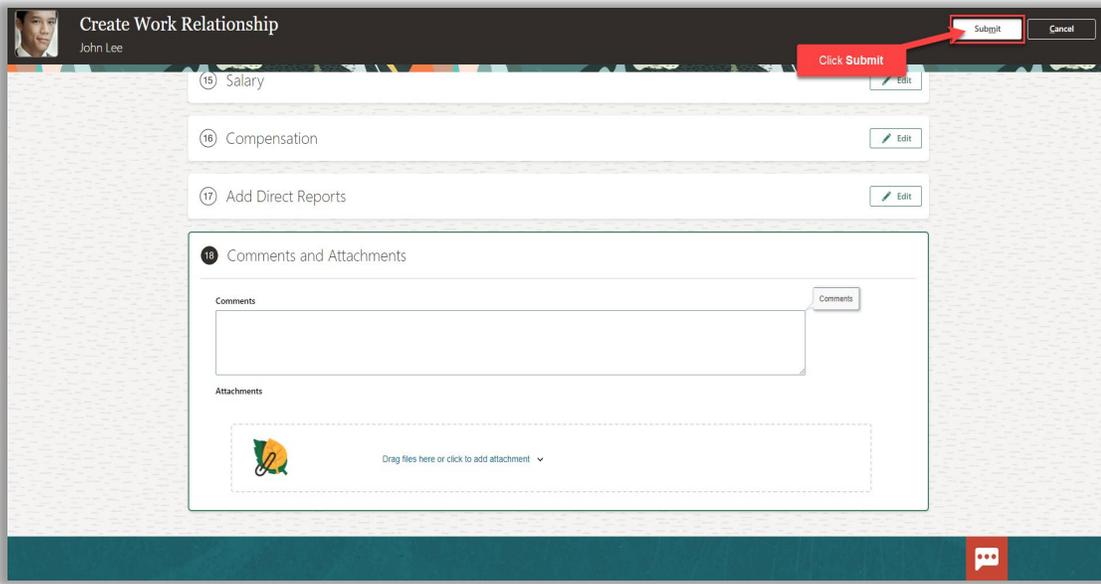
From the **Create Work Relationship** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by our team. Click **Continue**



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



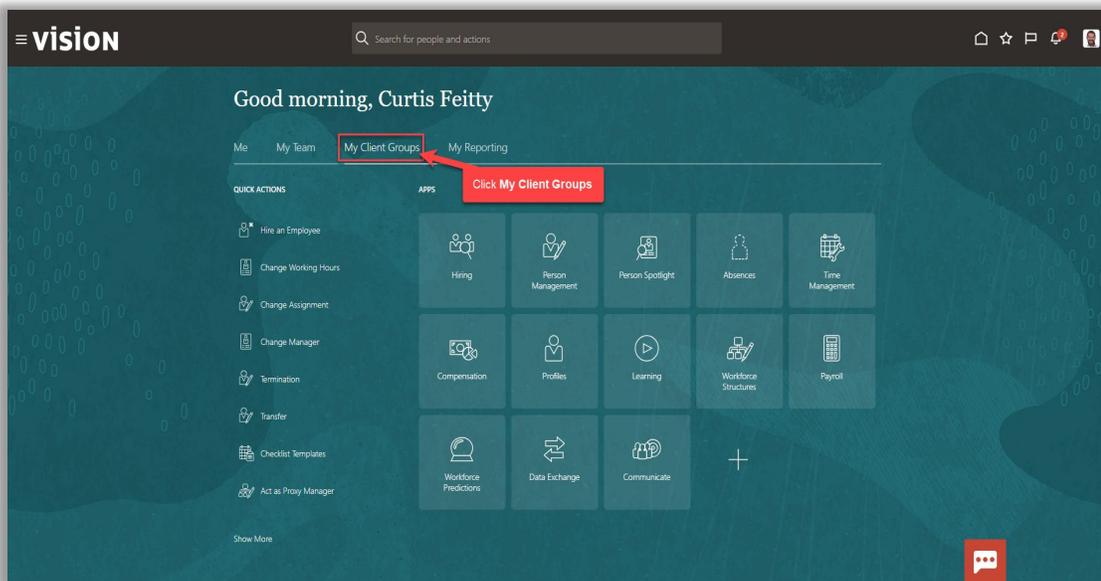
Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The rehire information for this employee has been updated.



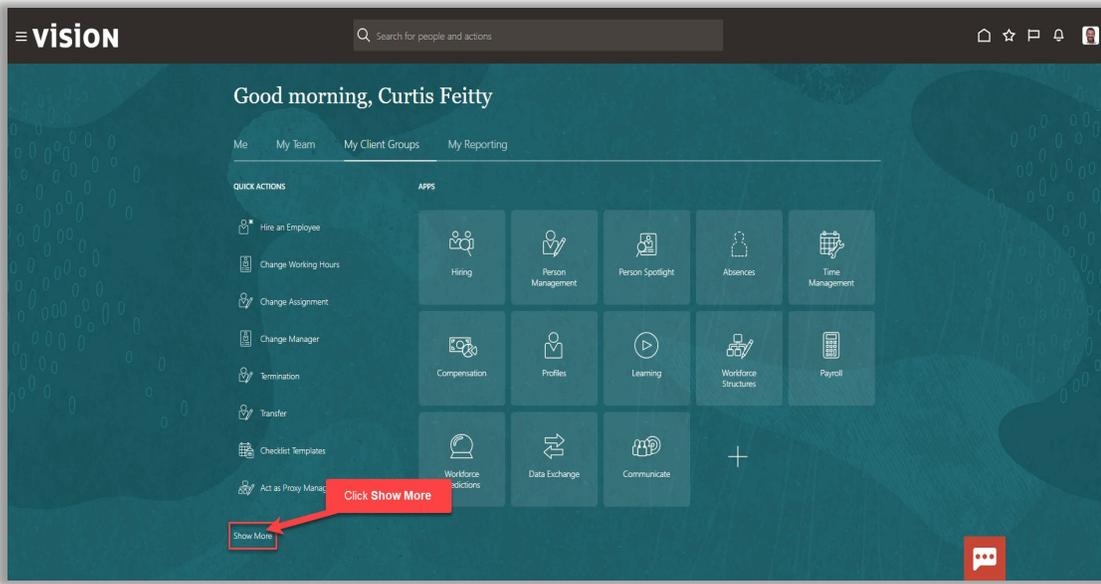
Perform A Global Transfer

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

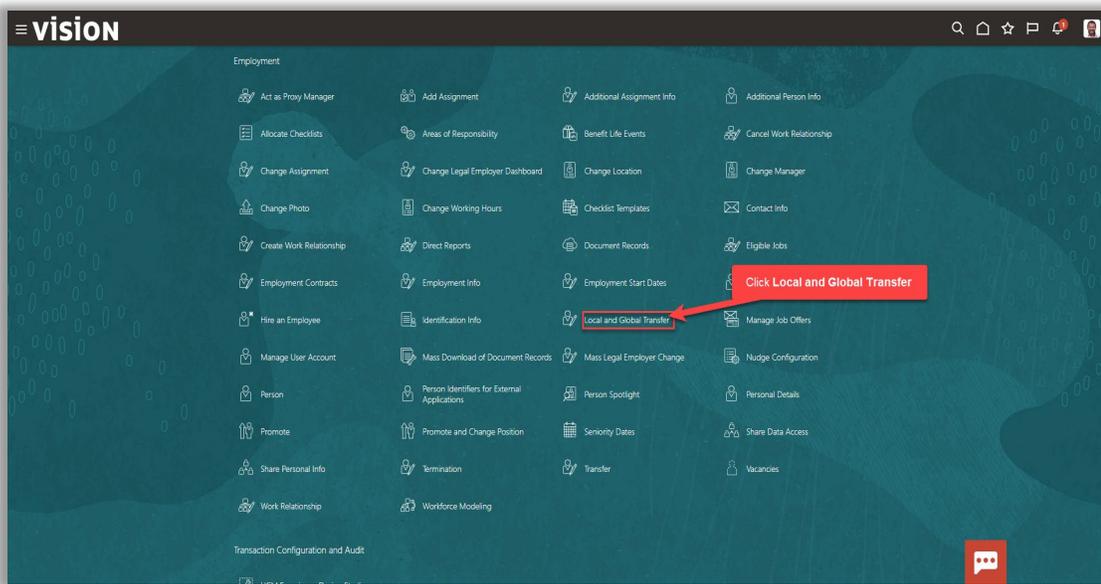
From the home screen, click **My Client Groups**



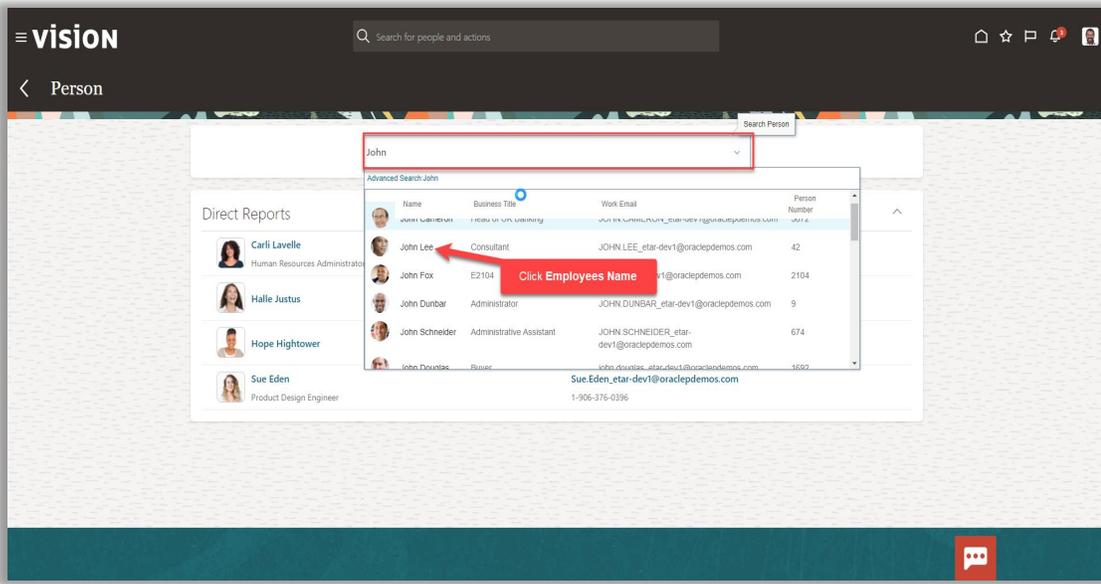
Next, click **Show More**



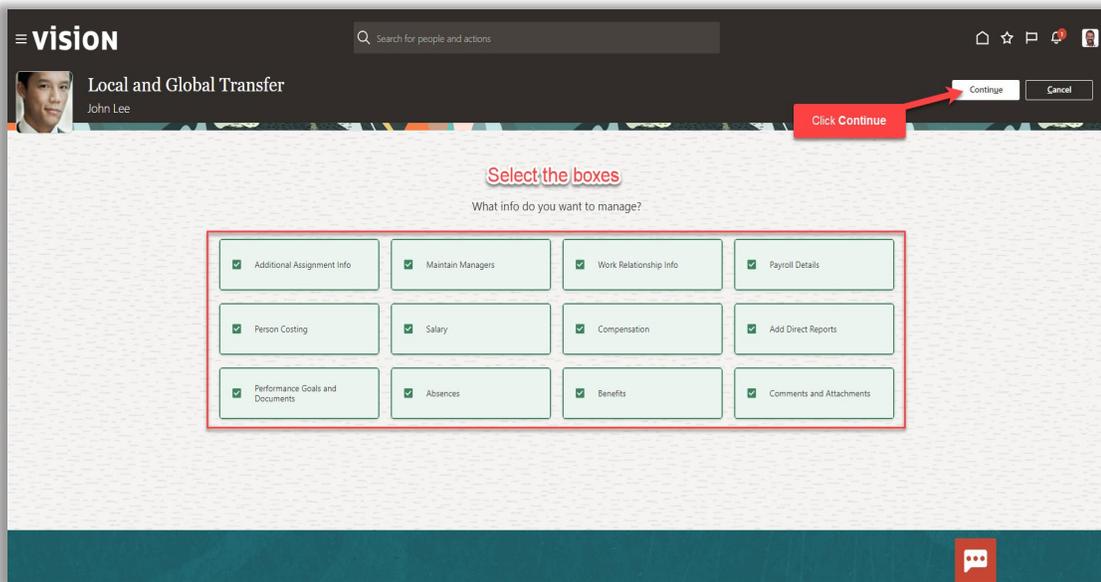
Scroll down and under **Employment**, click **Local and Global Transfer**. As a note, we can search **Local and Global Transfer** by clicking Ctrl F



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



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**



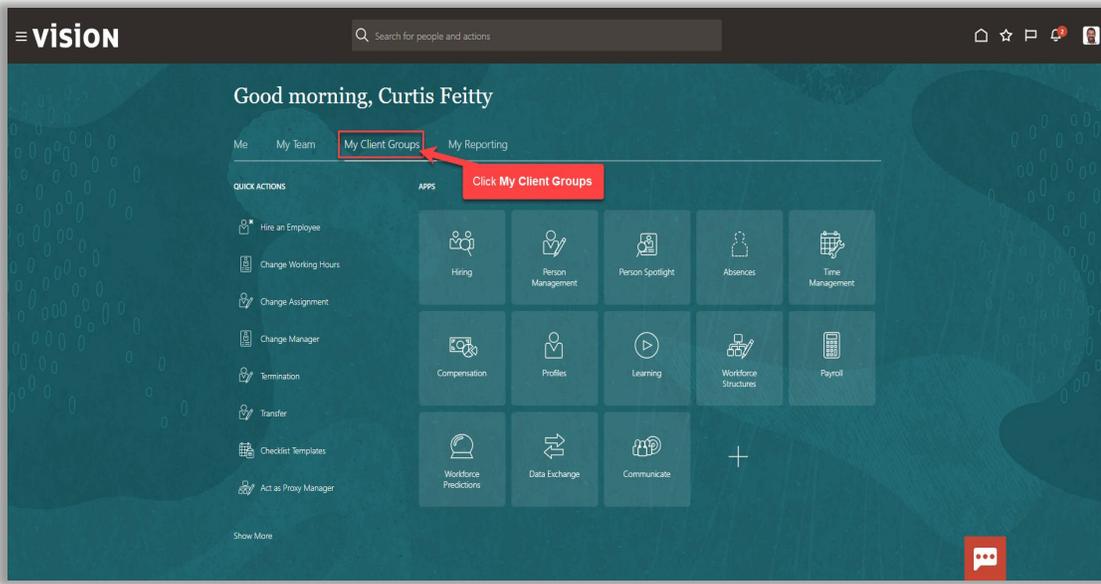
Enter the information in the **When and Why** section. Ensure we have selected the correct **New Legal Employer** for this **Global Transfer** then, click **Continue**

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.

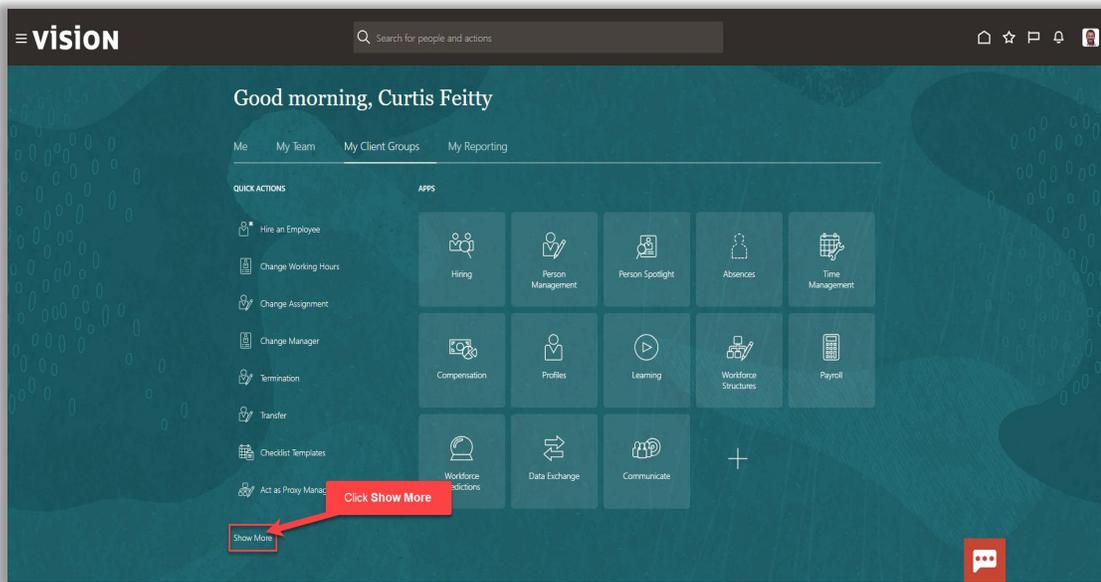
Add A Secondary Assignment For An Employee

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

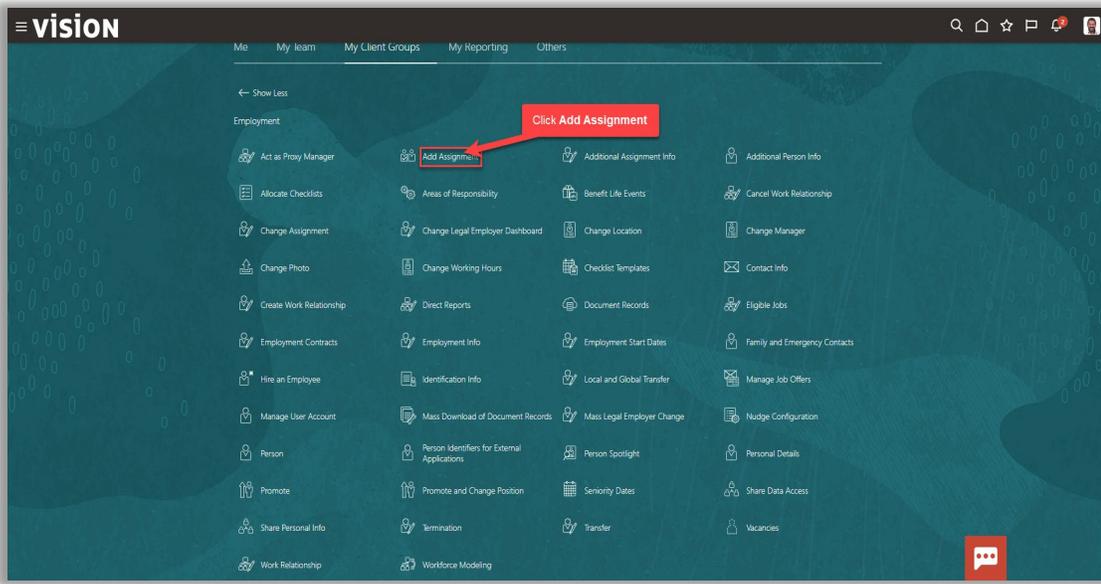
From the home screen, click **My Client Groups**



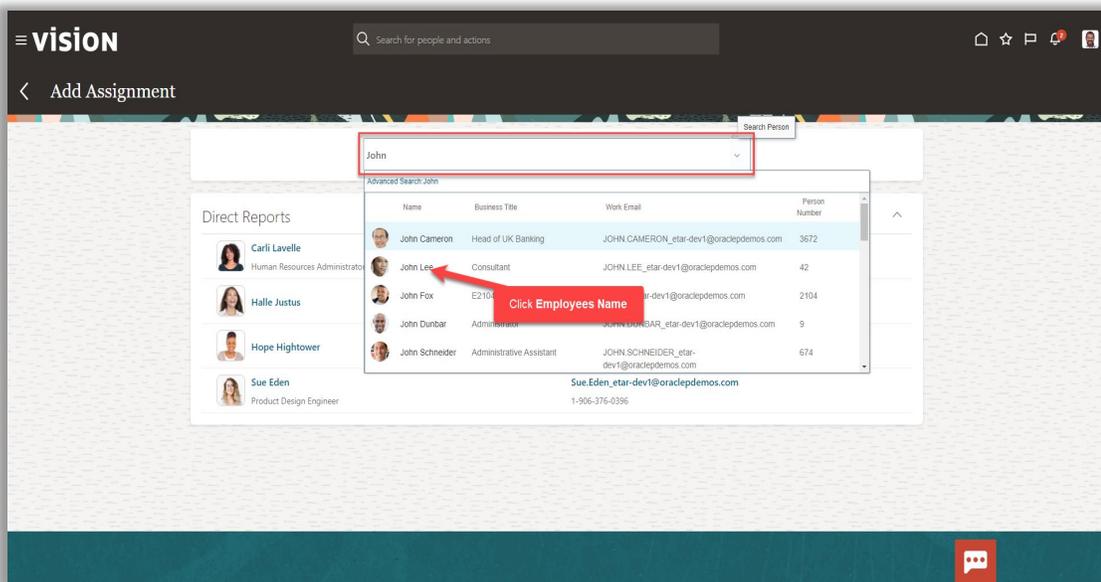
Next, click **Show More**



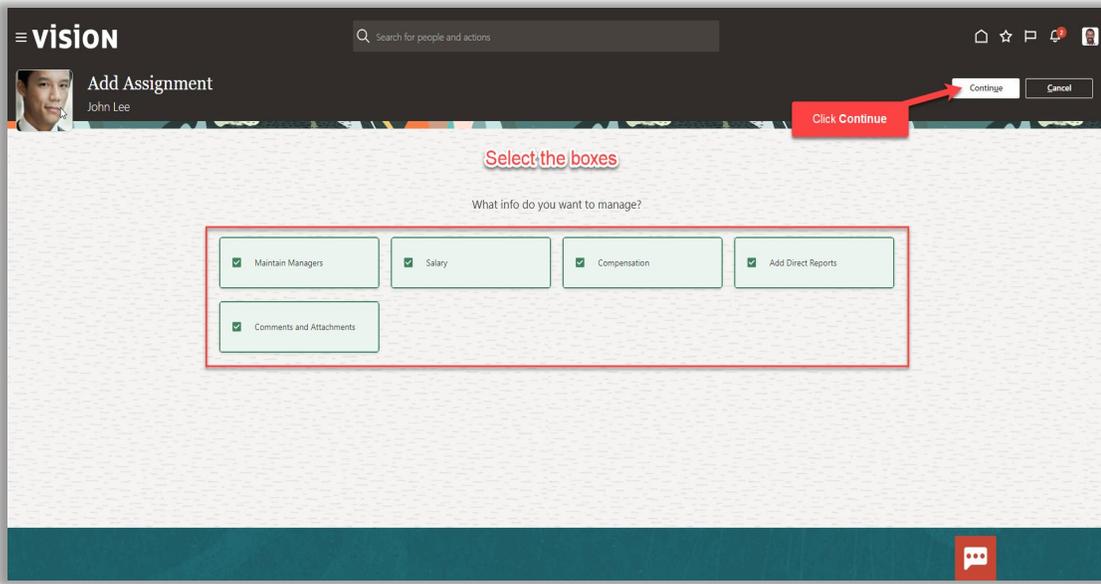
Scroll down and under **Employment**, click **Add Assignment**. As a note, we can search **Add Assignment** by clicking Ctrl F



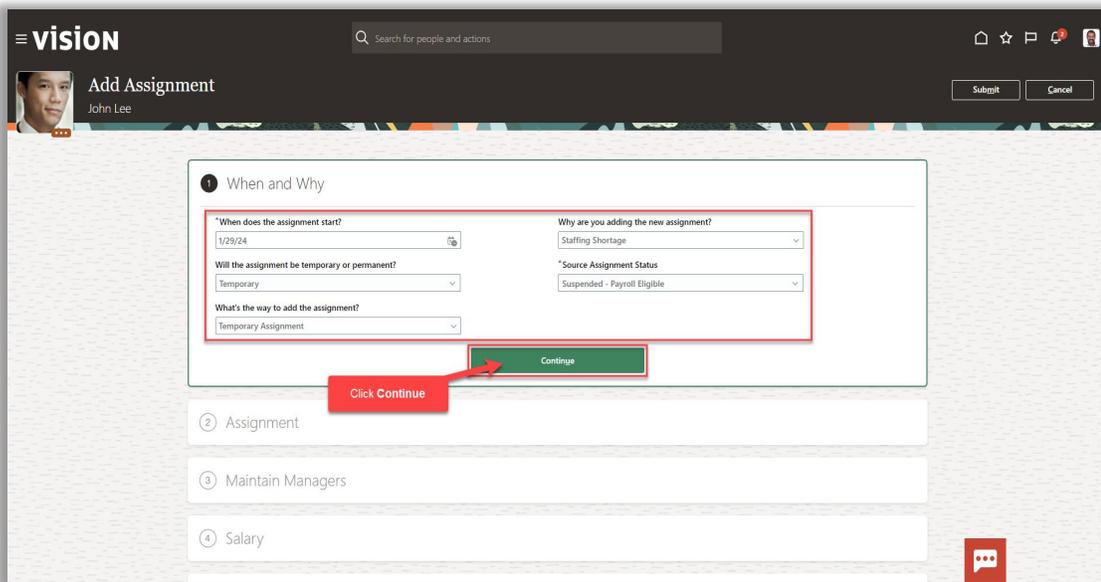
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



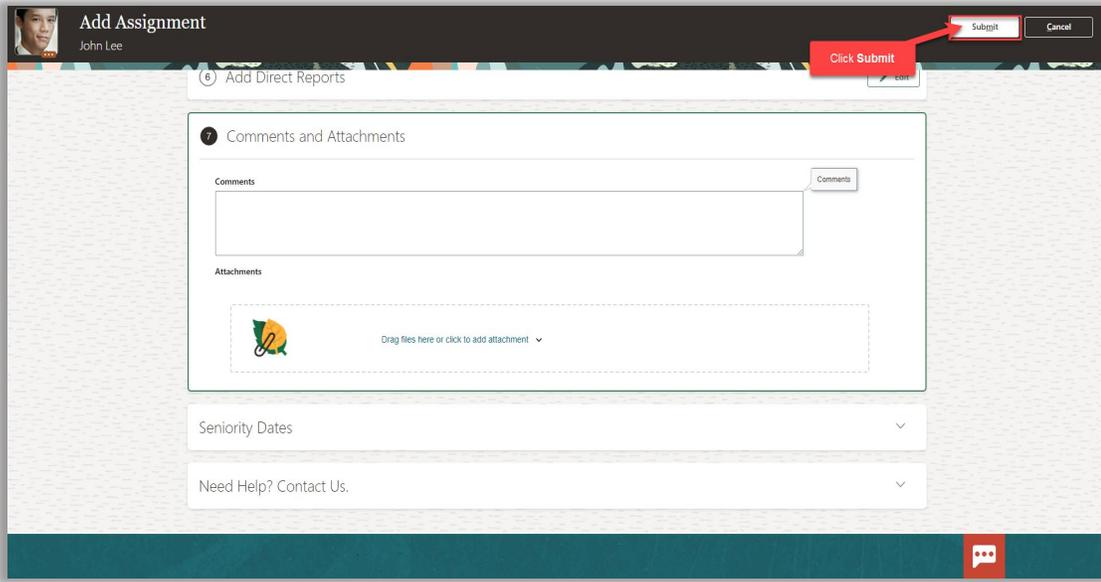
From the **Add Assignment** screen, select the information we want to manage. We recommend selecting all the boxes unless the information included in the box is optional and not required to be entered by our team. Click **Continue**



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**



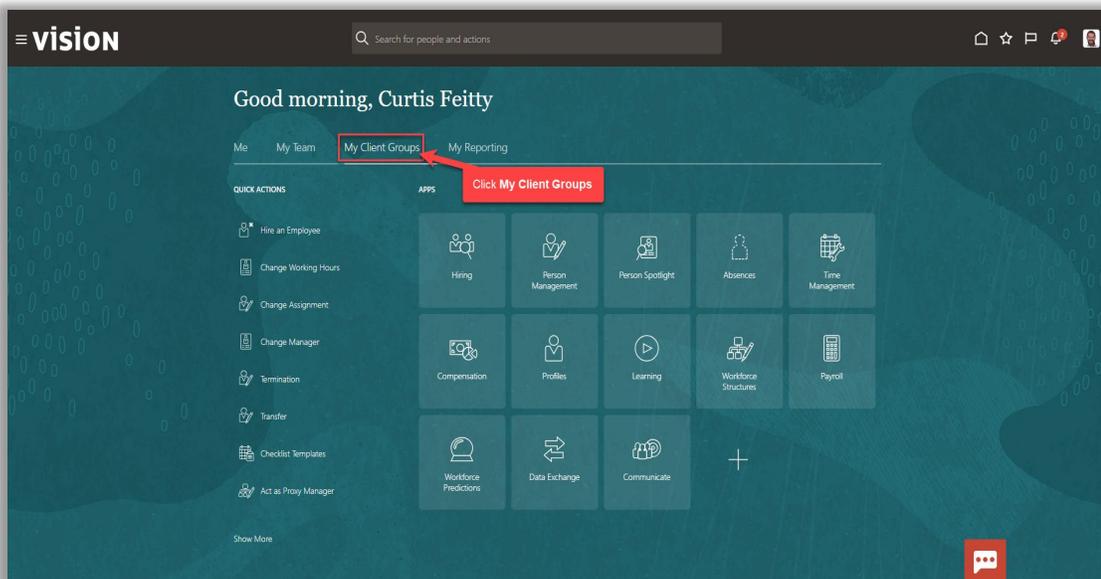
Follow this same process and complete the information in each section. The information needed in each section will depend on our configurations. Once we have added the information in the sections below, click **Submit**. The Add Assignment for this employee has been submitted.



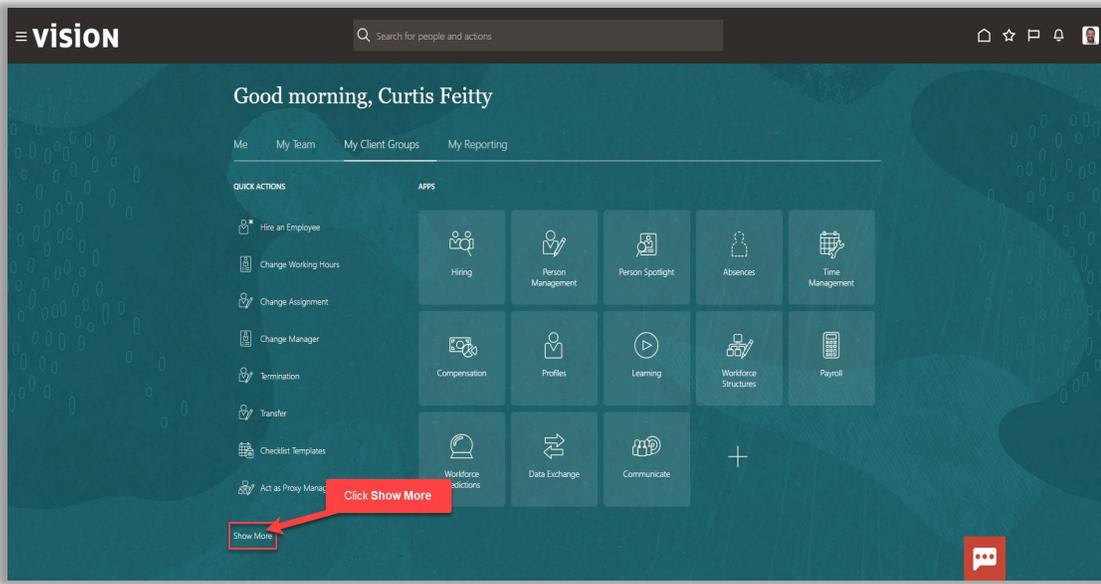
View Employee Document Records

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

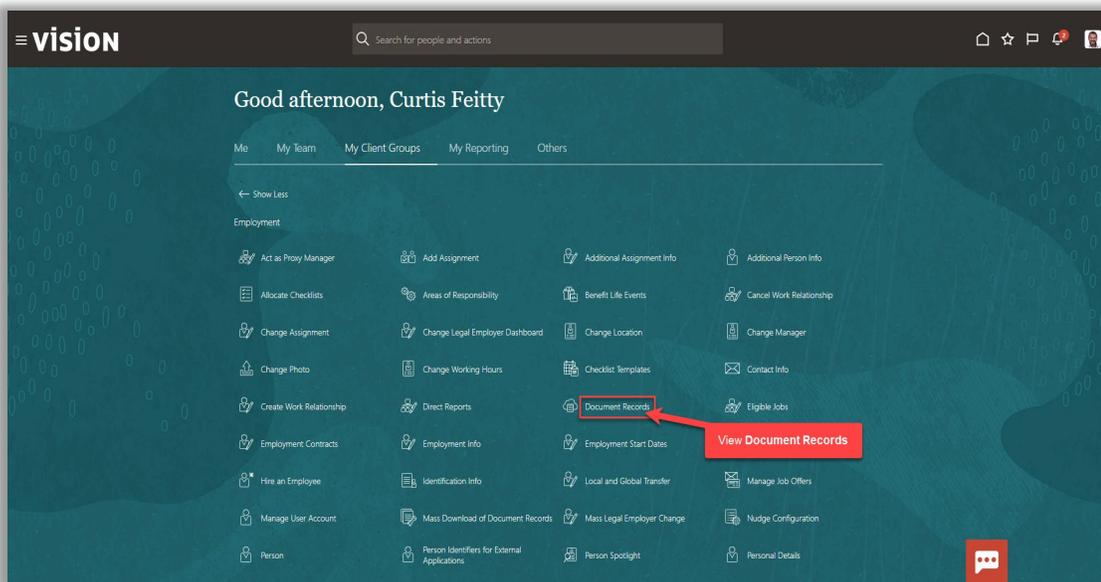
From the home screen, click **My Client Groups**



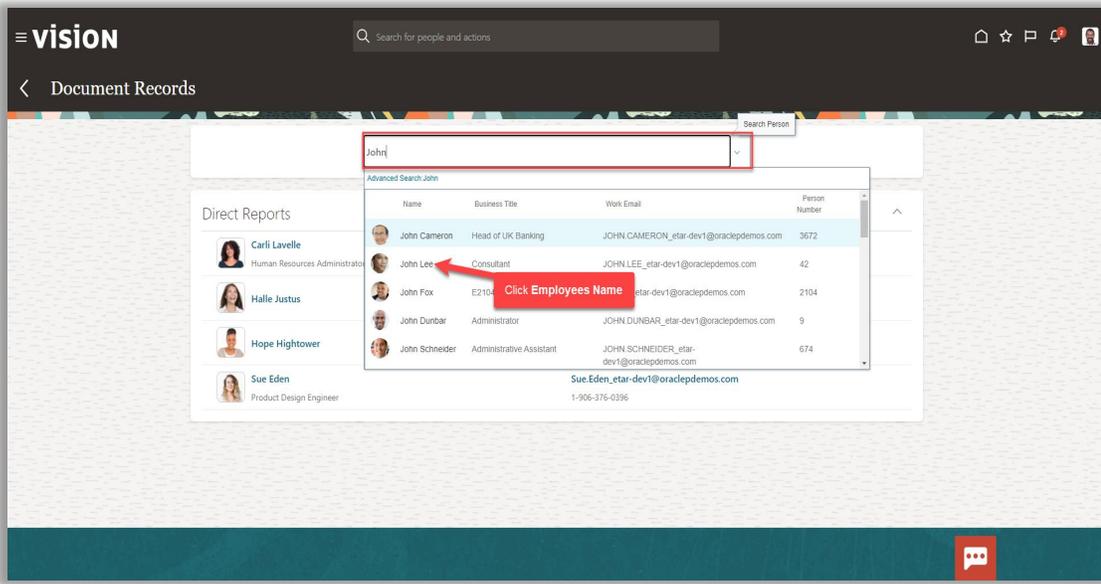
Next, click **Show More**



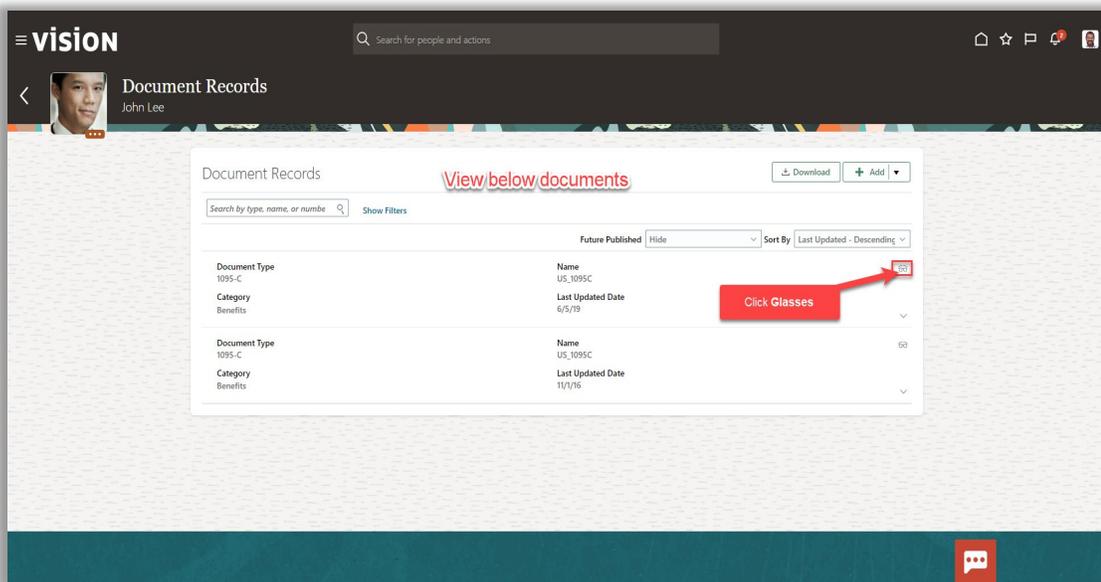
Scroll down and under **Employment**, click **Document Records**. As a note, we can search **Document Records** by clicking Ctrl F



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



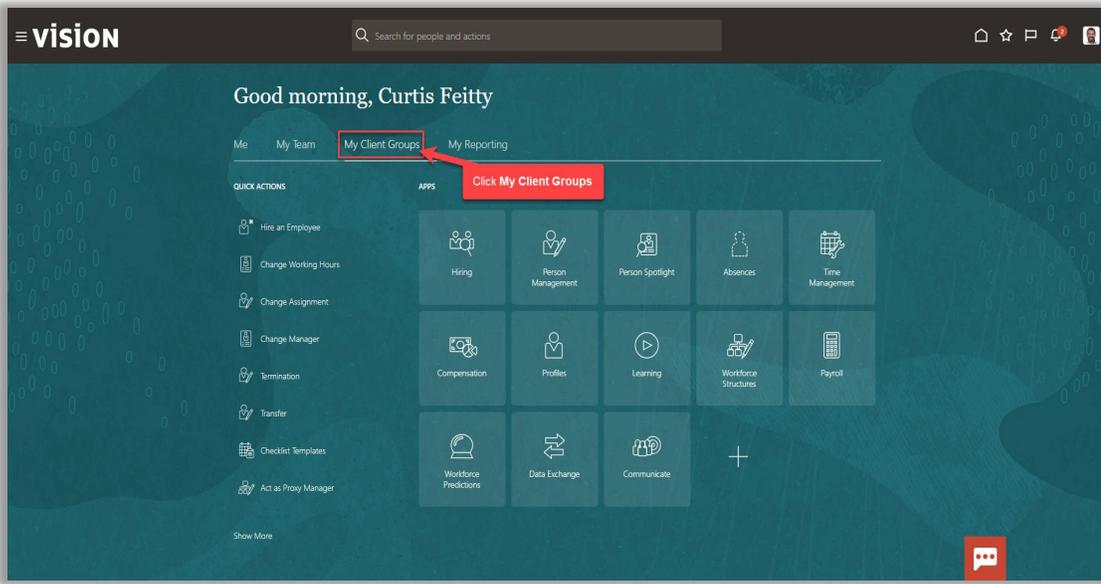
Below, we can view the employee documents. To view the document and the details, click the **Glasses**



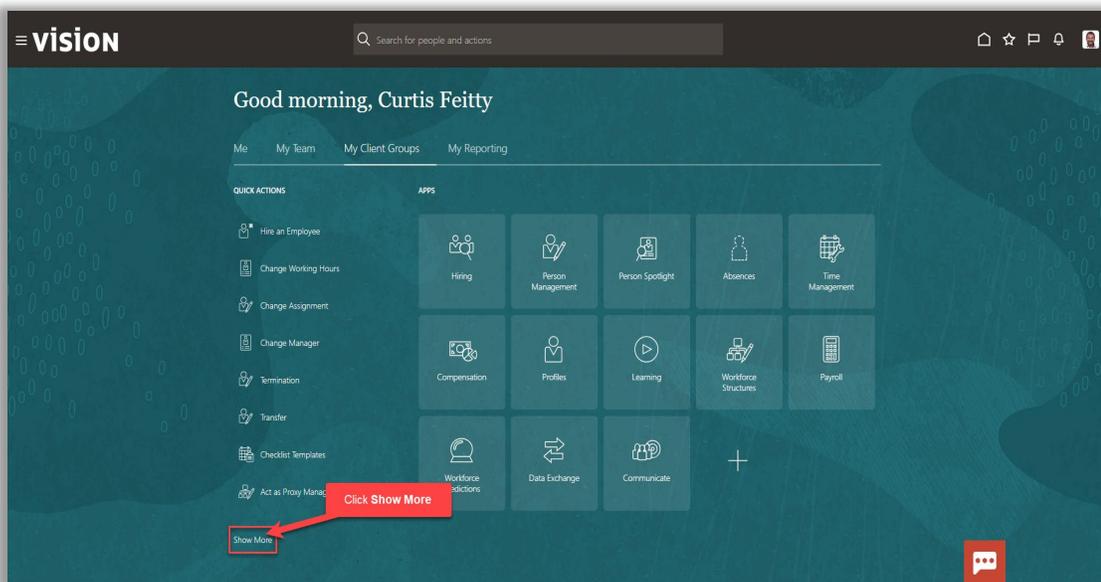
End A Secondary Assignment

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

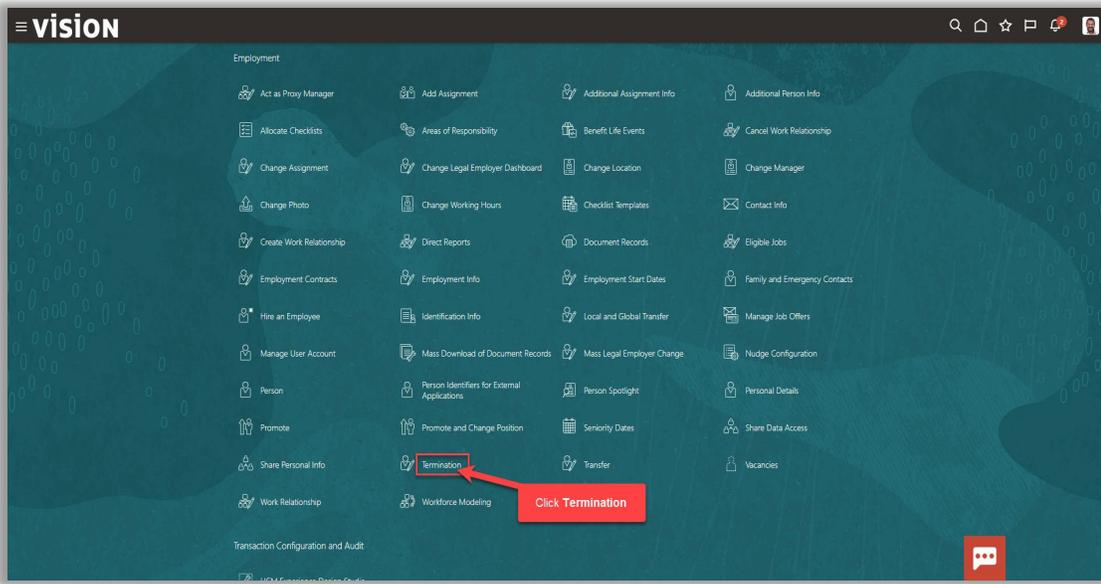
From the home screen, click **My Client Groups**



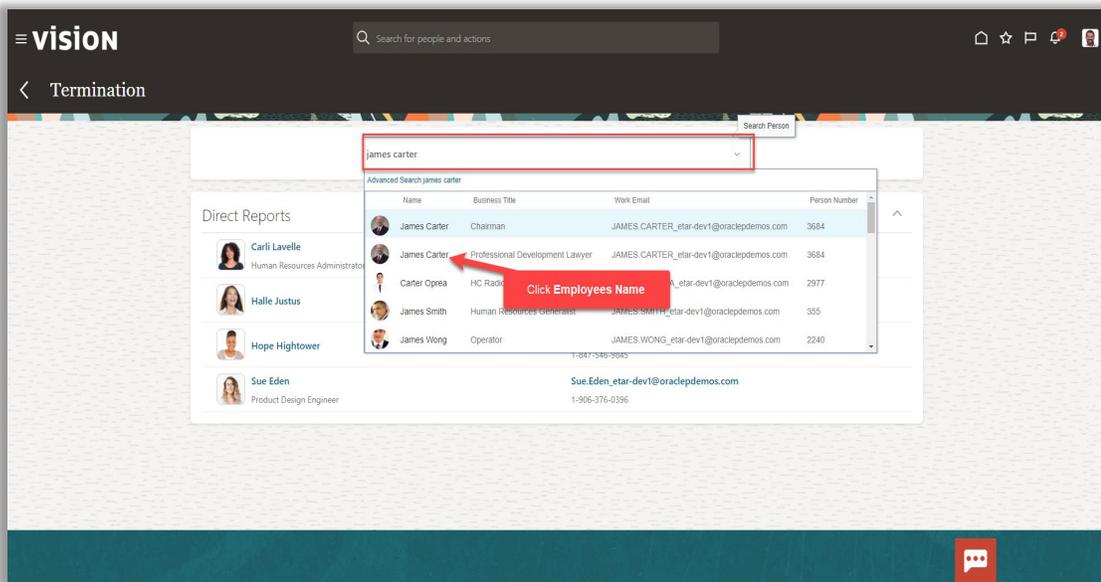
Next, click **Show More**



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



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



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

vision Search for people and actions

James Carter

Submit Cancel

1 When and Why **Enter the below information**

This termination will end 2 assignments.
Show Assignment Details

When is the termination notification date? 2/1/24

When does the termination take effect? 2/29/24

What's the way to terminate the employee? Resignation

Termination Type: Voluntary

Why are you terminating James Carter? Better Opportunity

The employee can see their termination details when the termination type is voluntary.

Continue

Click Continue

2 Enter Termination Info

3 Comments and Attachments

Enter the **Termination Info** in this section. Click **Continue**

vision Search for people and actions

James Carter

Submit Cancel

1 When and Why Edit

2 Enter Termination Info **Enter the below information**

Revoke User Access: After termination

Recommended for Rehire: Yes

Continue

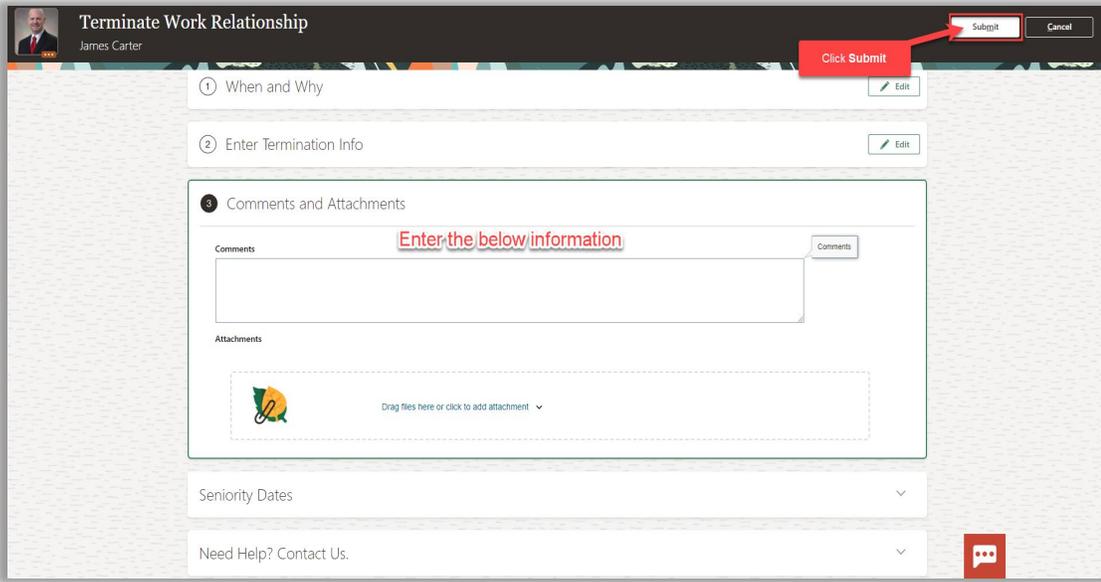
Click Continue

3 Comments and Attachments

Seniority Dates

Need Help? Contact Us.

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

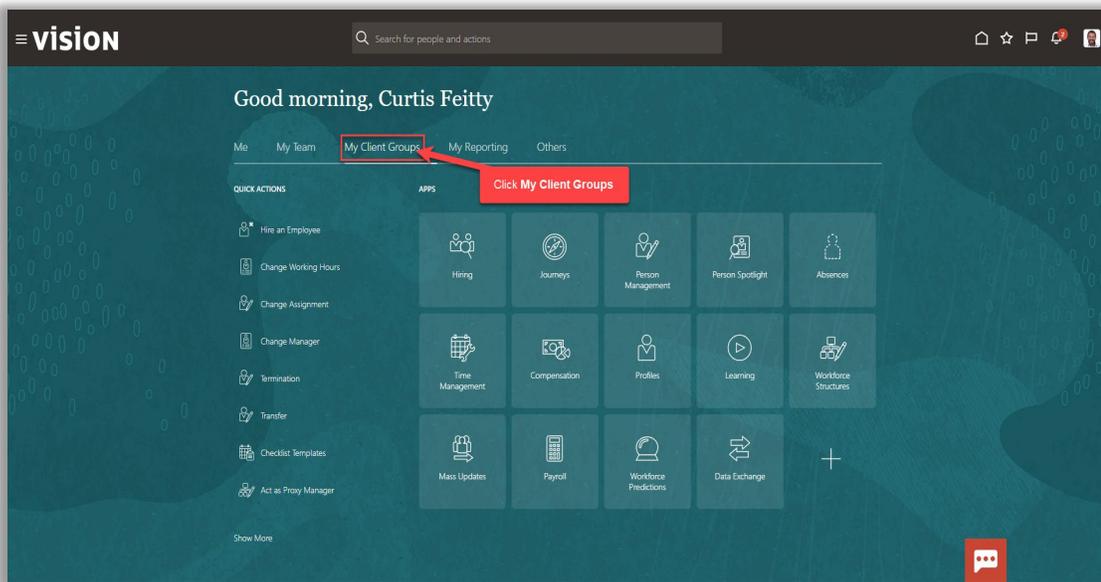


The assignment will be ended as of the effective date

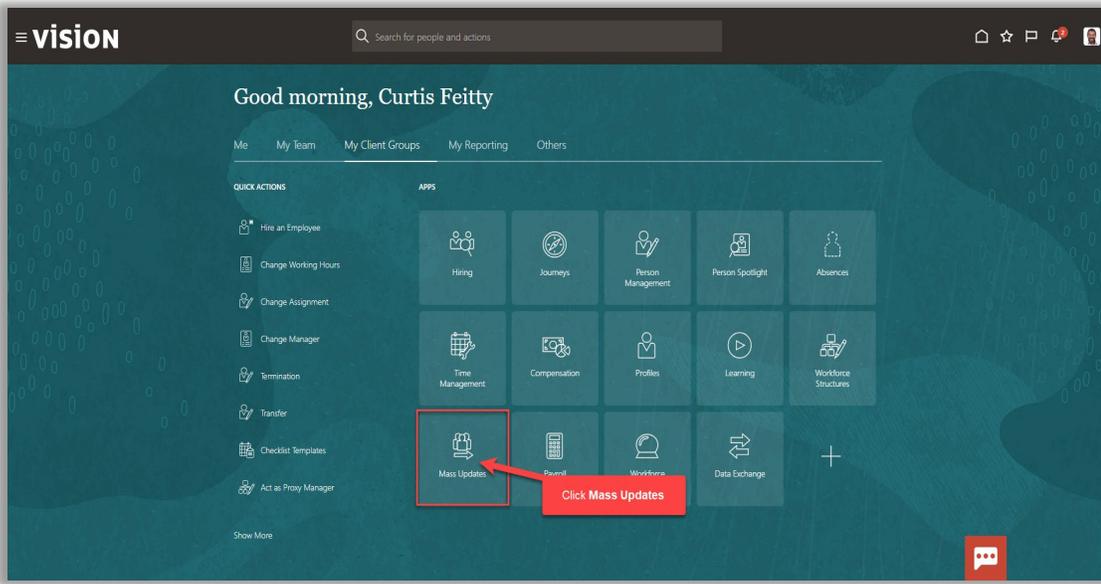
Create Mass Update

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

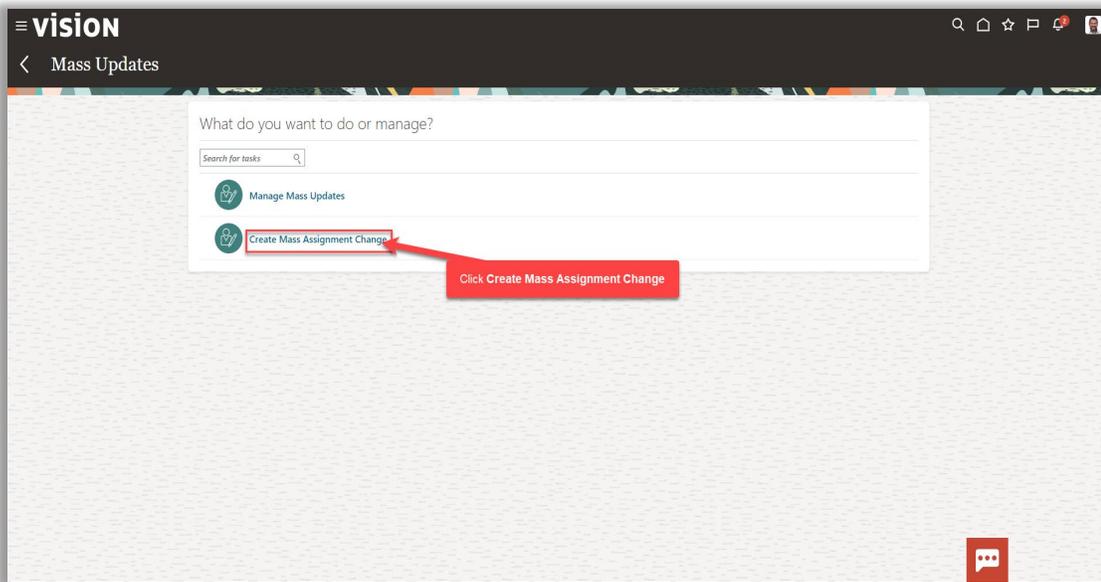
From the home screen, click **My Client Groups**



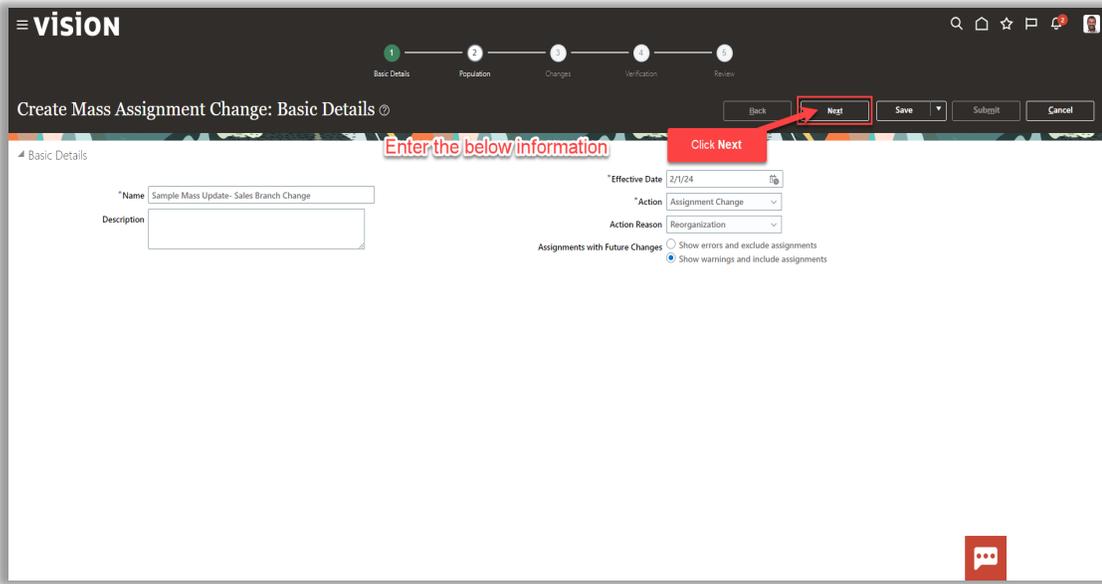
Click **Mass Updates**



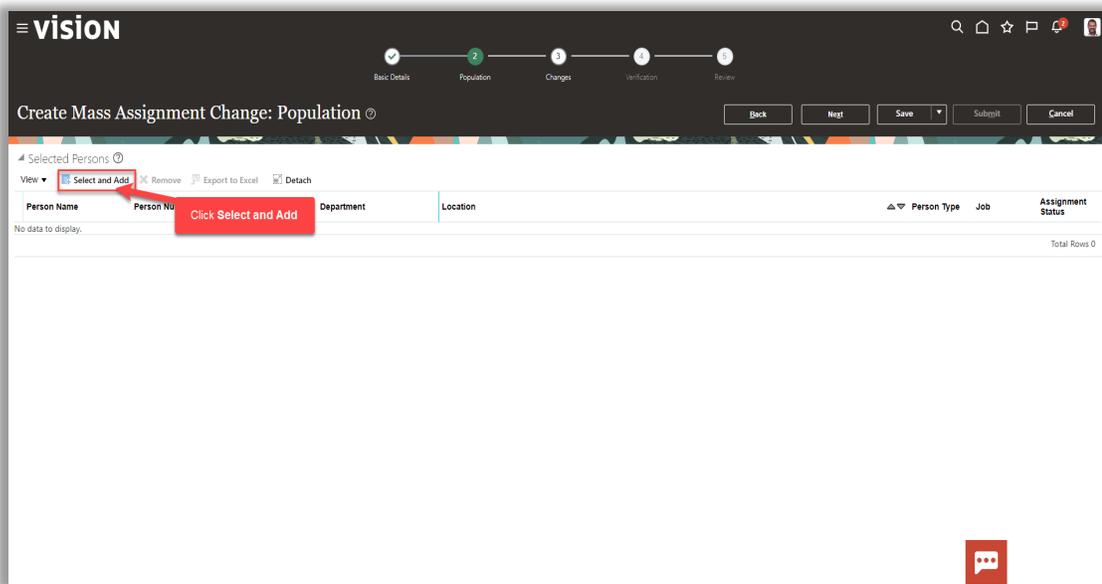
From the Mass Updates screen, click **Create Mass Assignment Change**



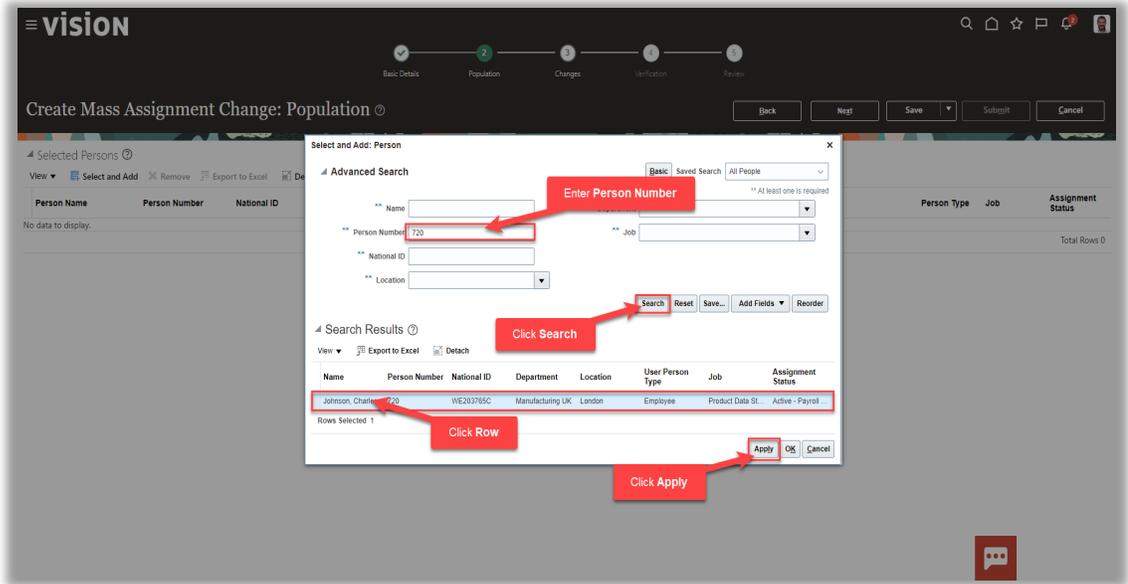
Enter the **Effective Date**. Next, enter the remaining **Basic Details** and click **Next**



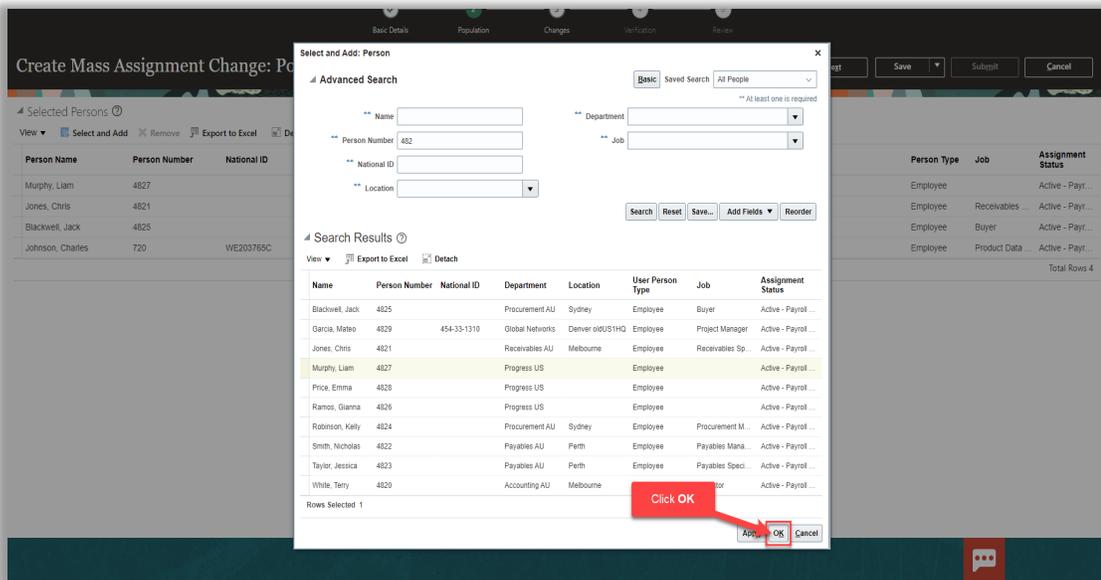
Next, we'll select the employees who will be included in this **Mass Assignment Change**. This functionality will be used to update Assignment Details, Job Details, Location Details, and Manager Details that have the same effective date. Click **Select and Add**



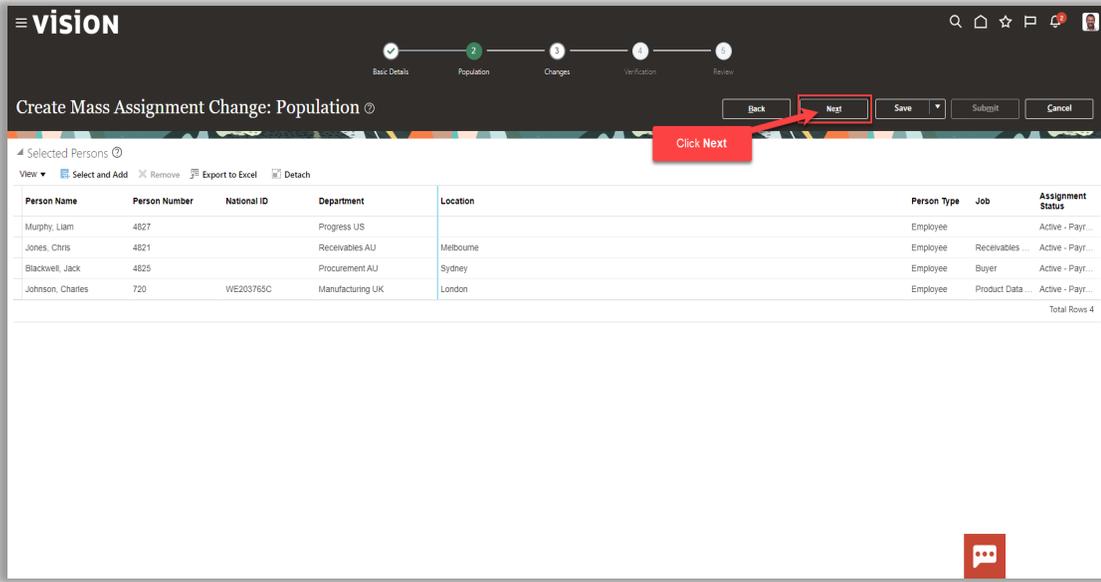
Enter the **Employees Name** or **Person Number** and click **Search**. Highlight the row of the employee in the results and click **Apply** to add this employee to the **Mass Update Population**



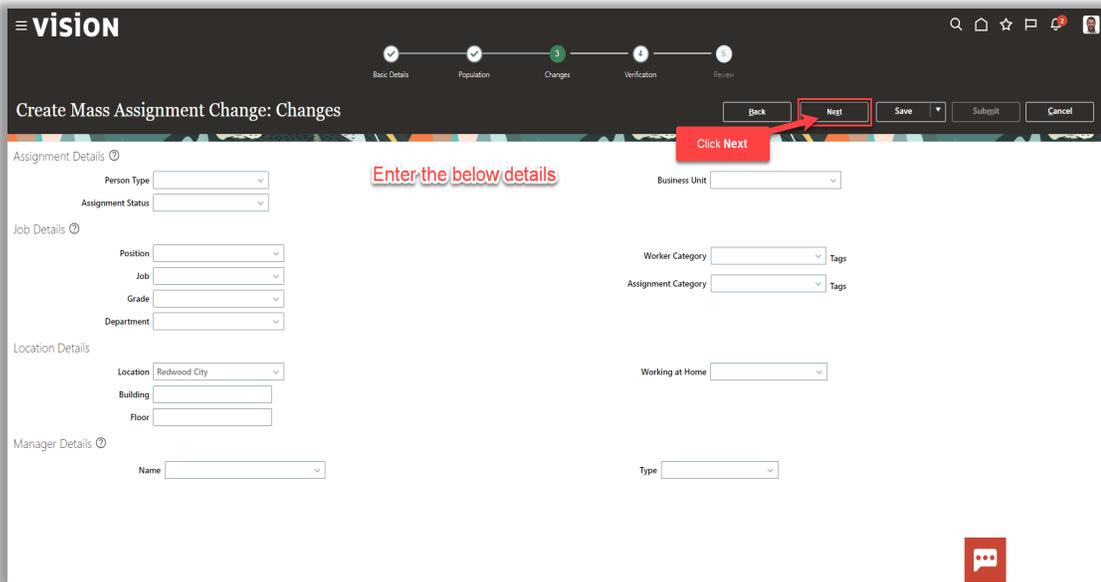
Follow this process to add additional employees. Once complete, click **OK**



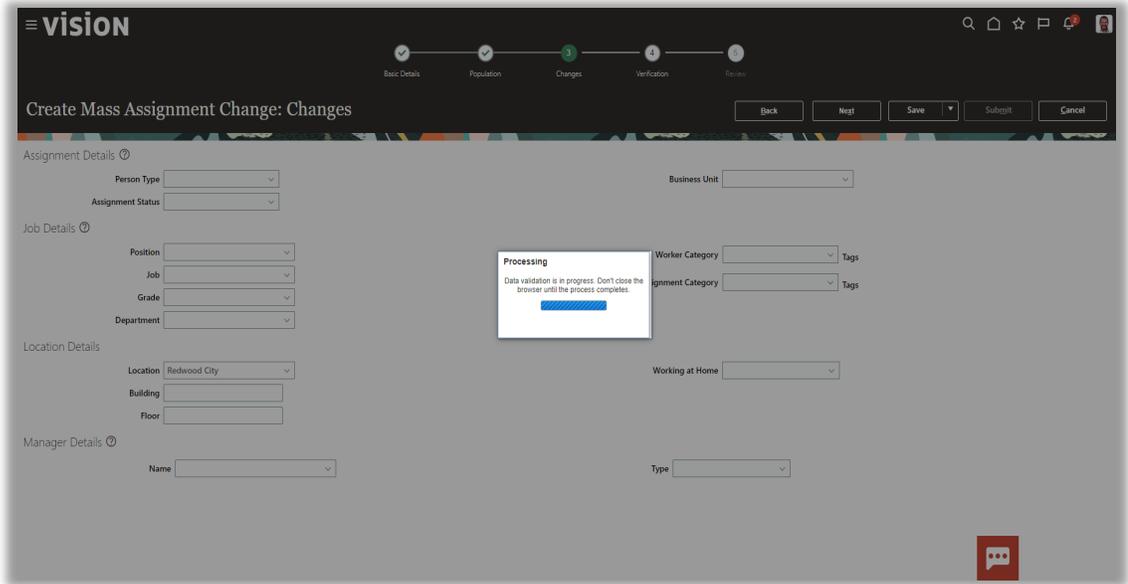
Click **Next**



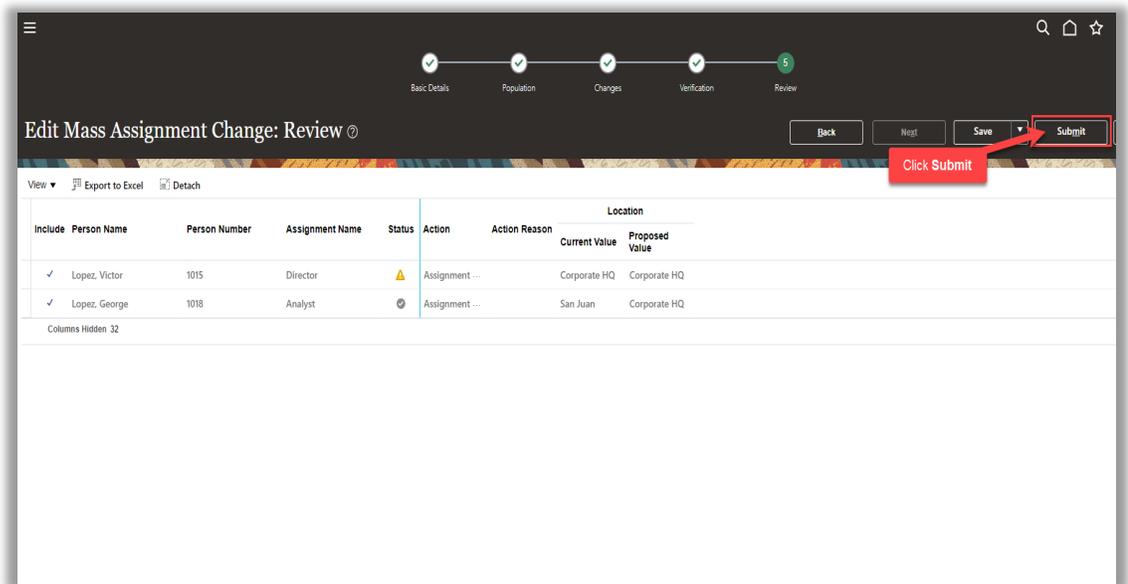
Enter the Mass Assignment Changes. For example, the new work Location. Click Next



A Data Validation message will appear



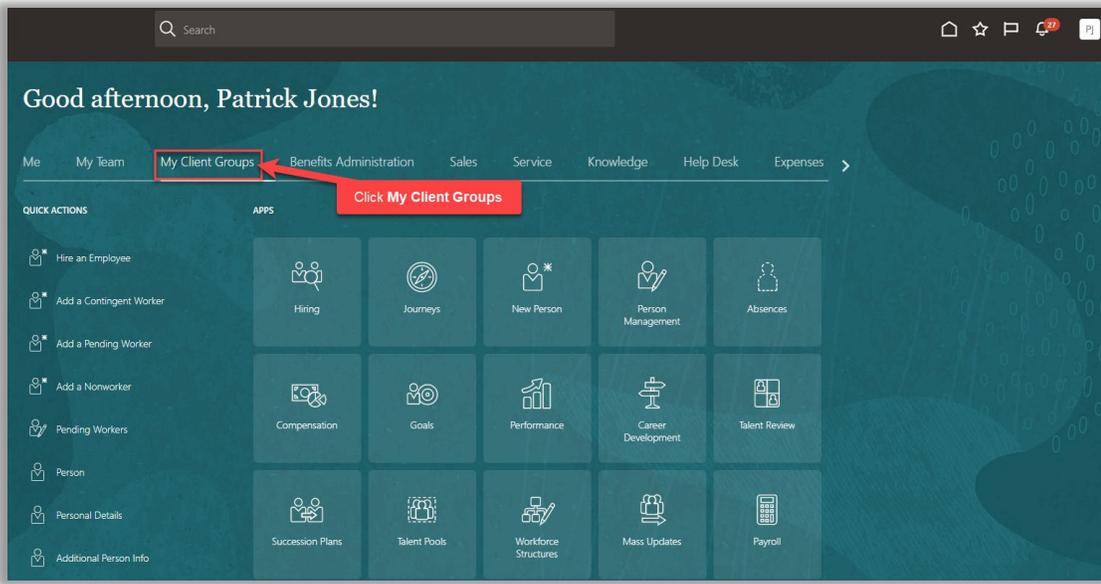
Next, Verify the updated information. Review the Status Column messages by hovering over the Icon and click **Next** and click **Submit**



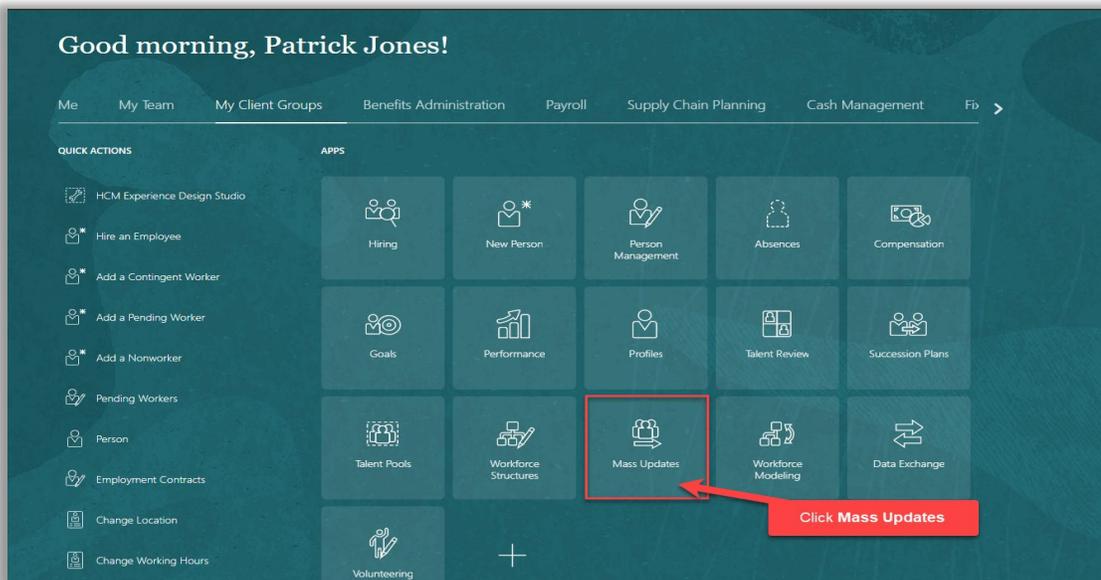
Manage Mass Updates

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

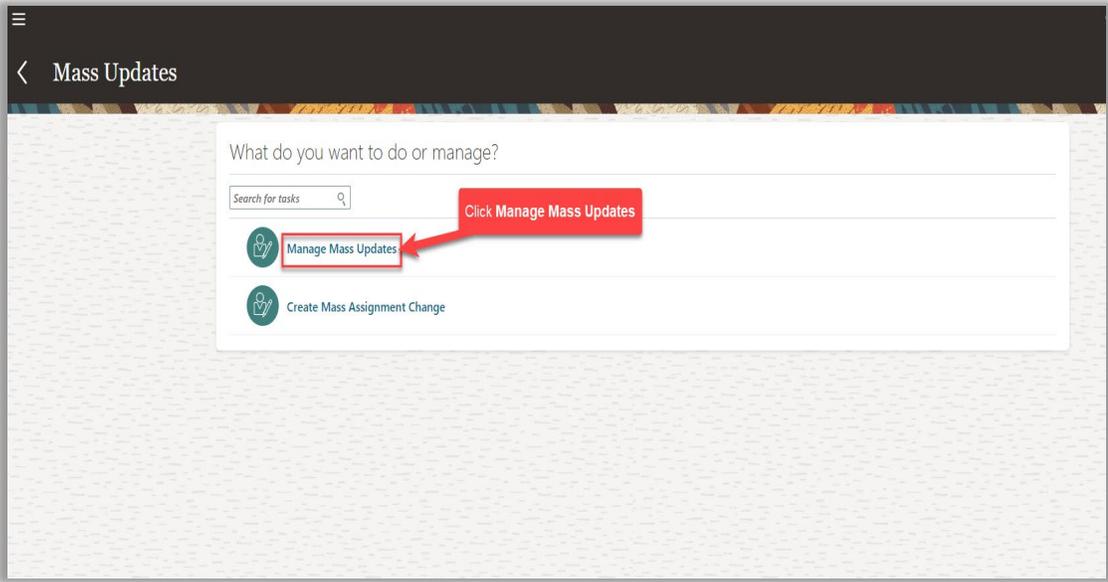
From the home screen, click **My Client Groups**



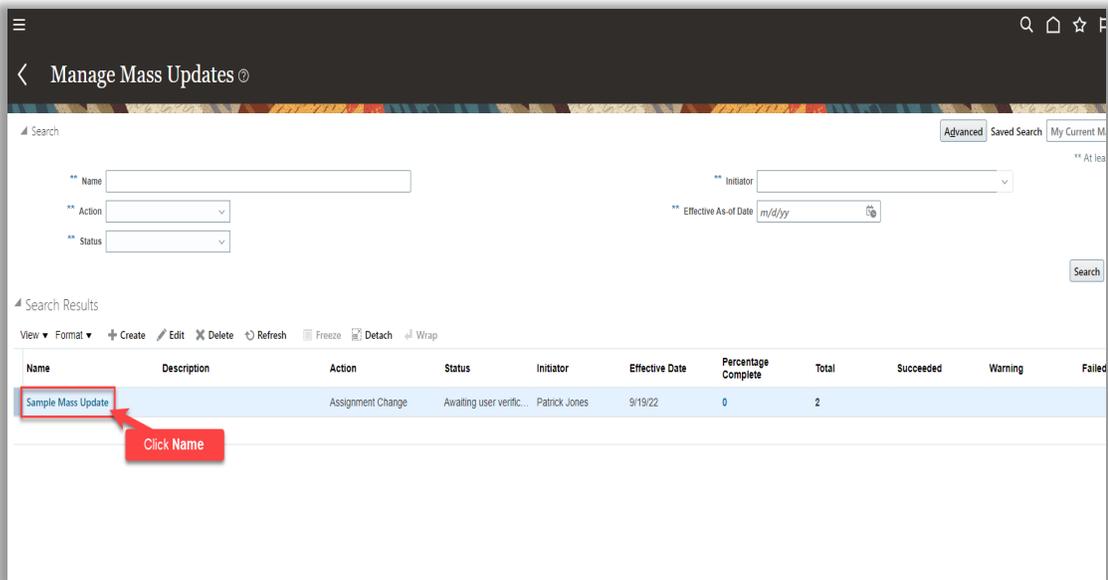
Click Mass Updates



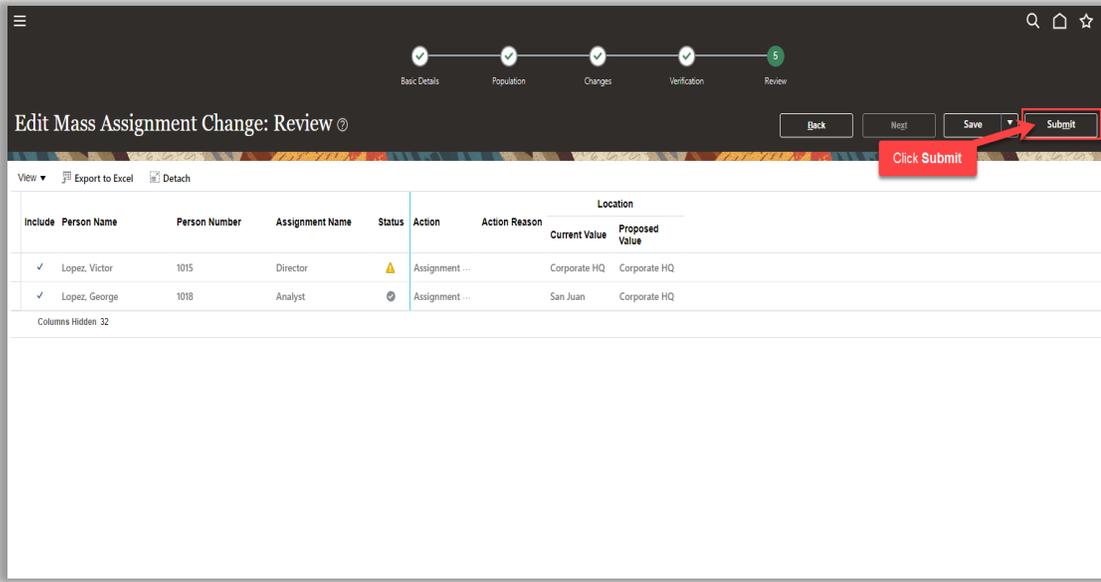
From the Mass Updates screen, click Manage Mass Updates



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



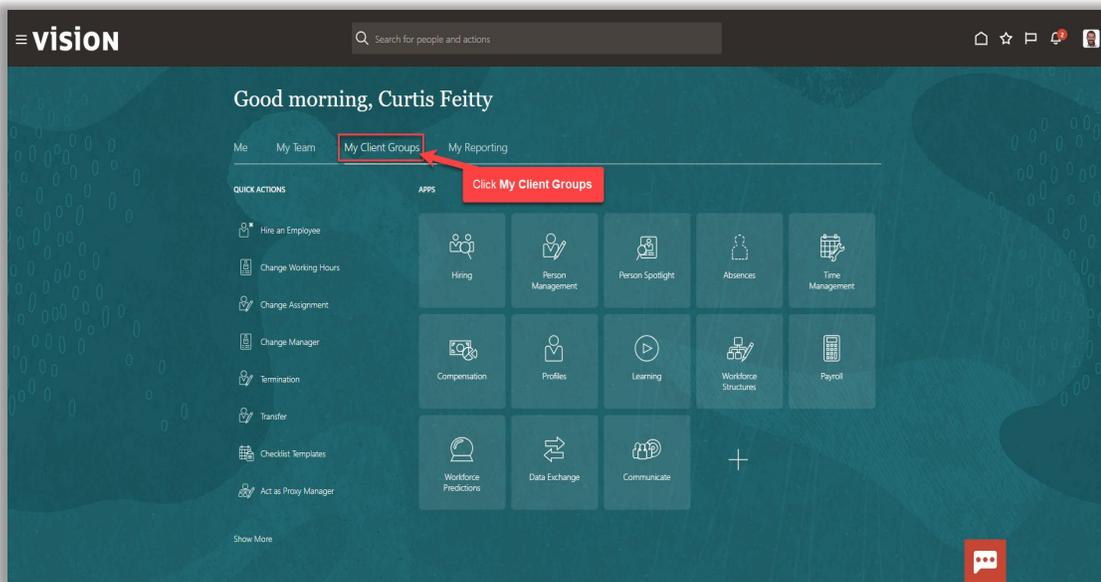
Update the applicable information in any of the sections by updating the information and clicking **Next**. Once complete, click **Submit**



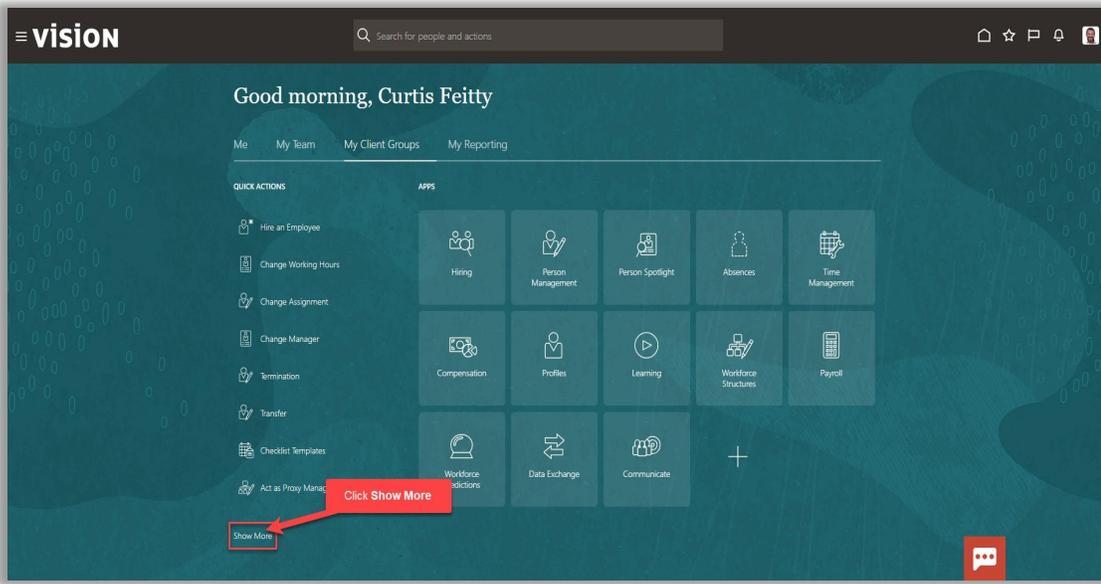
Update Employee's Document Delivery Preferences

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

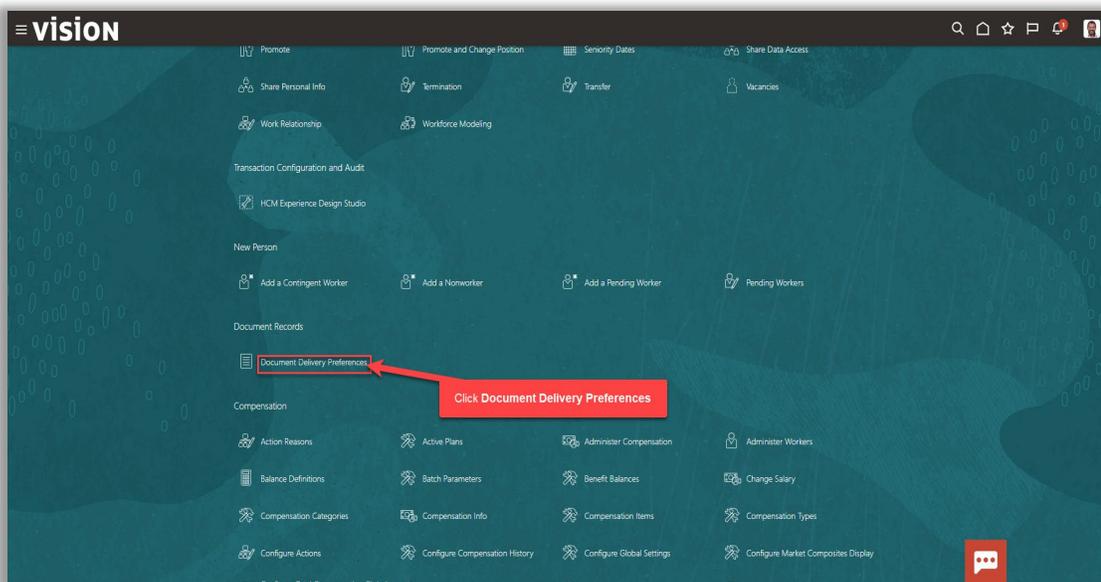
From the home screen, click **My Client Groups**



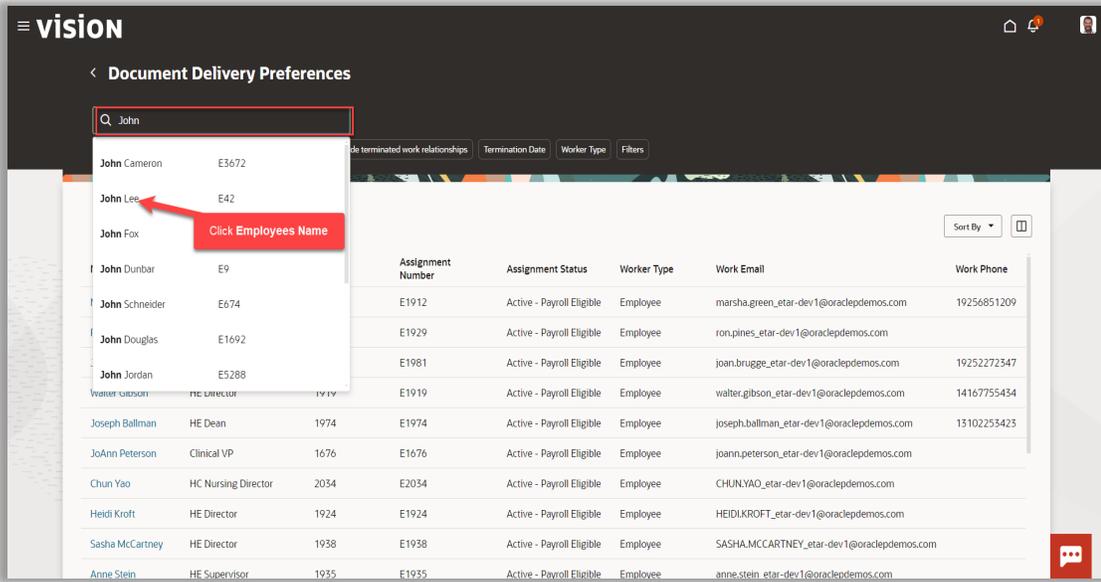
Next, click **Show More**



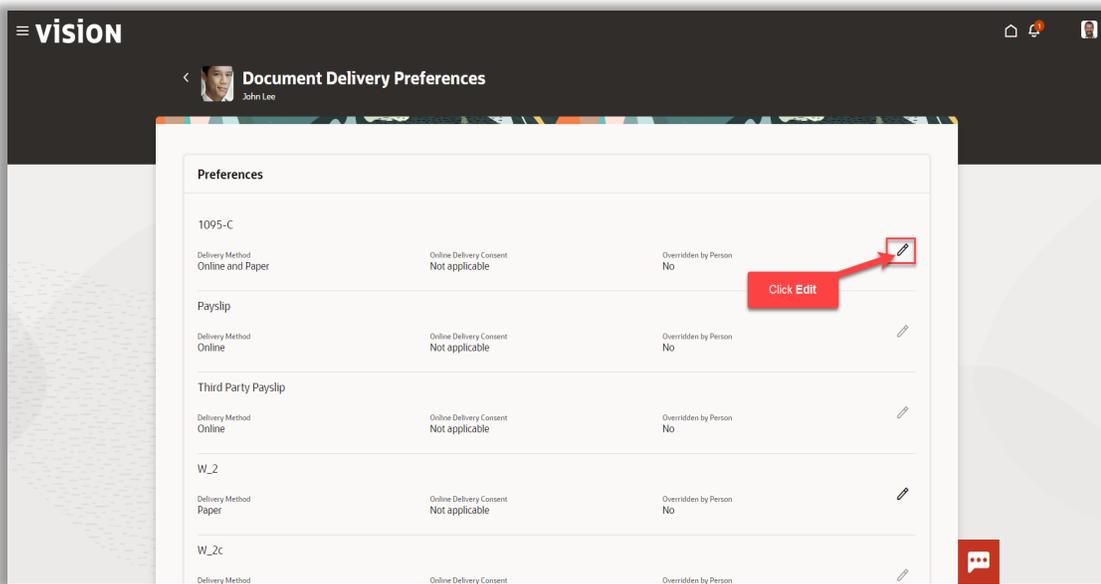
Under Document Records, click **Document Delivery Preferences**



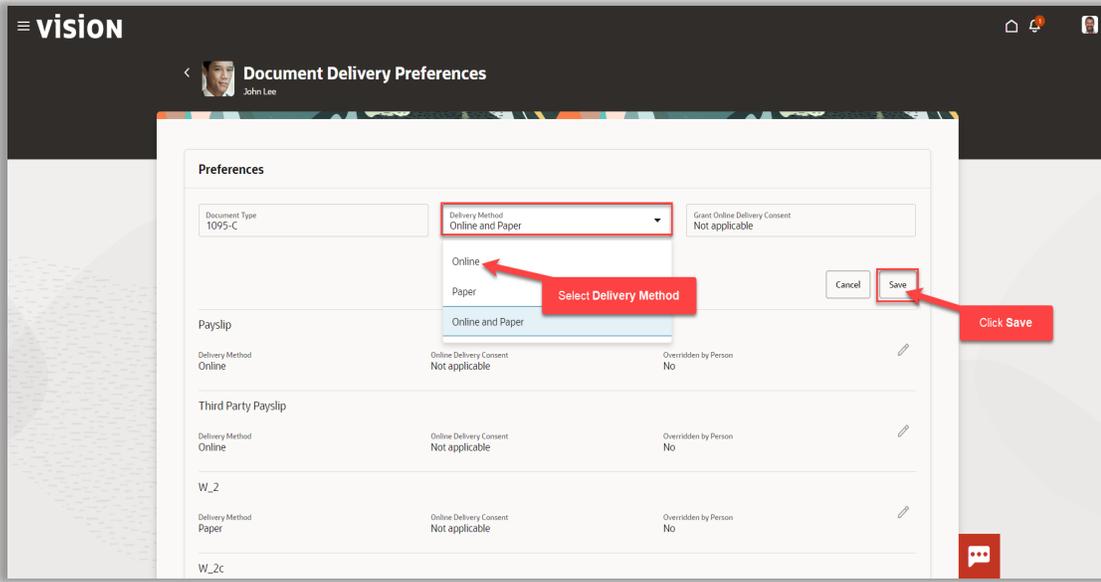
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



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



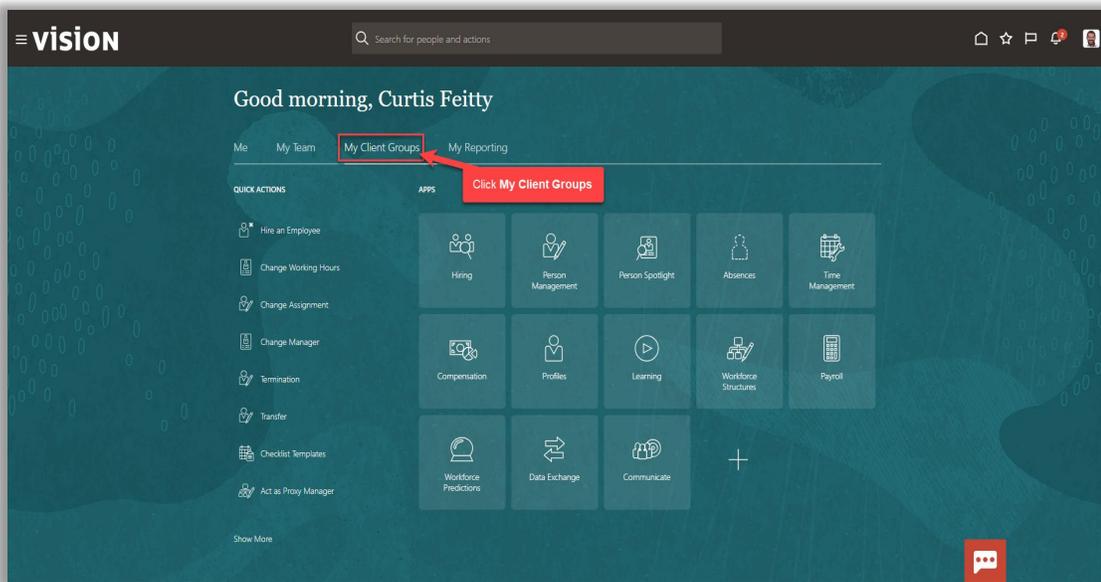
Select the **Delivery Method** from the dropdown menu and click **Save** to save the preferences



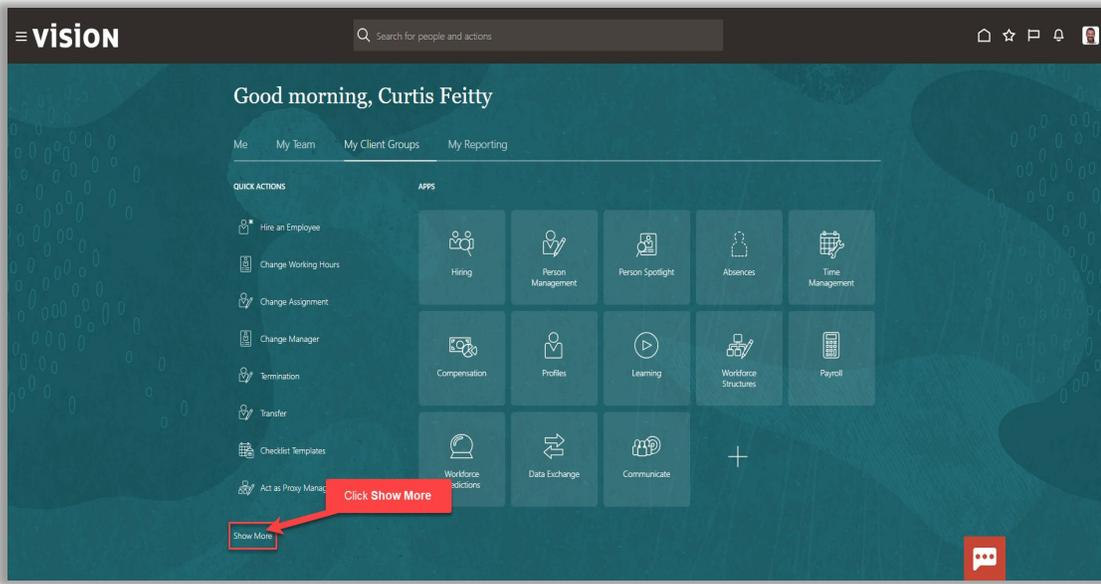
Update Employee's Tax Withholding

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

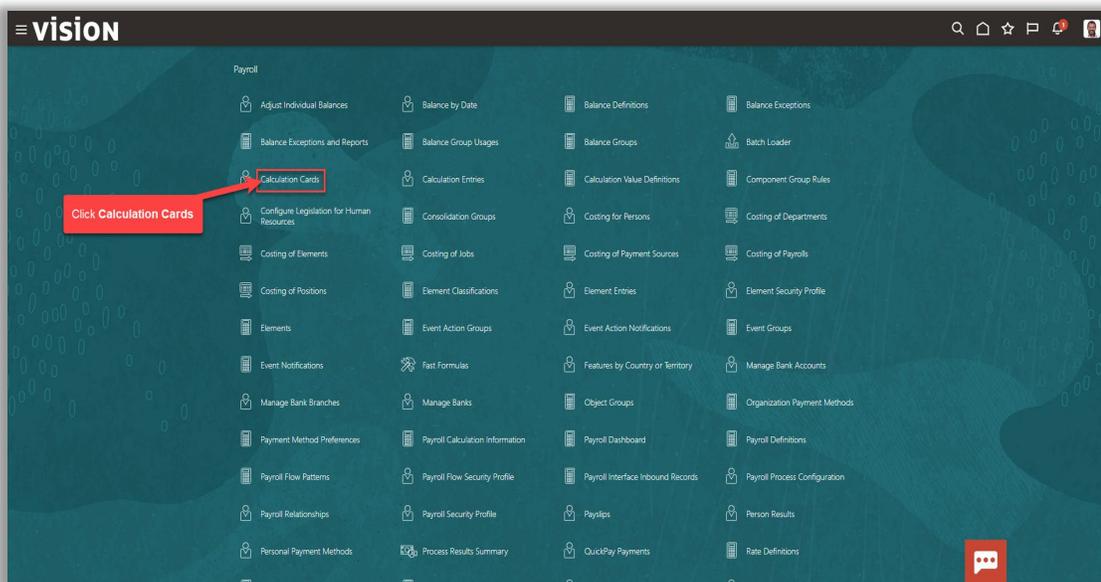
From the home screen, click **My Client Groups**



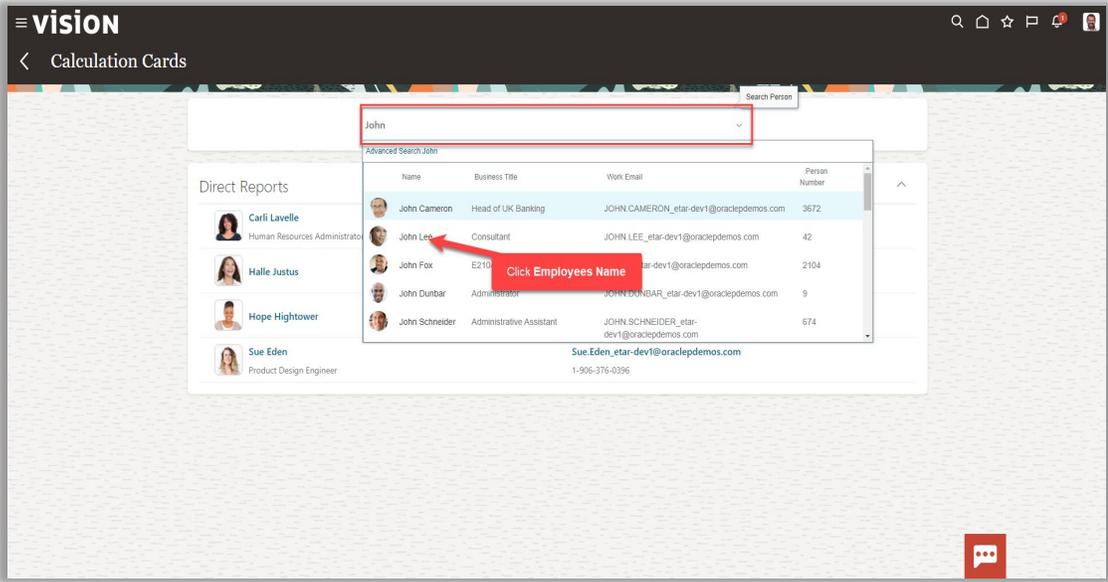
Next, click **Show More**



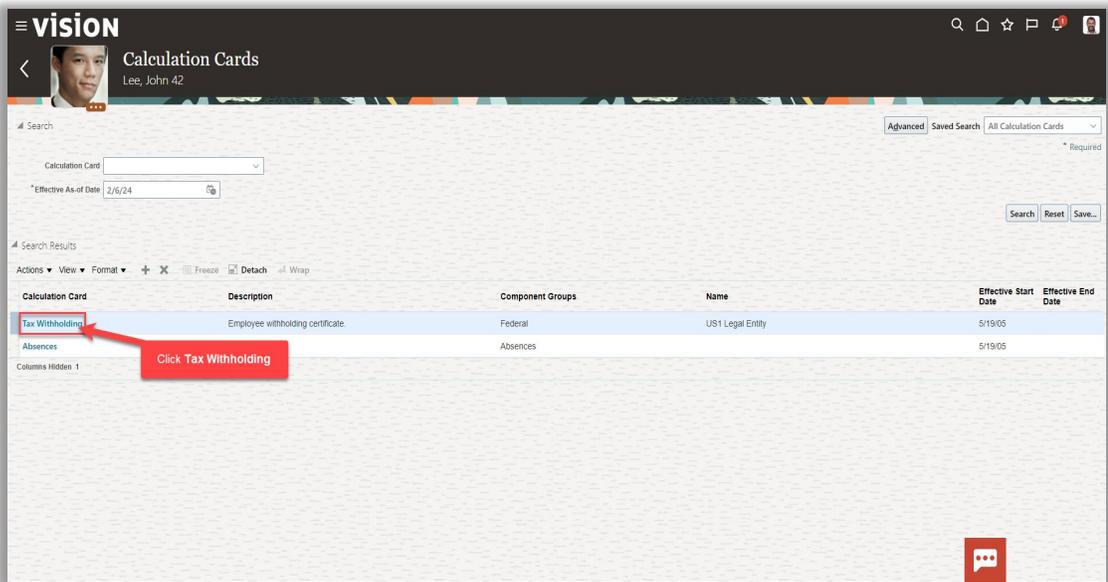
Under Payroll, click **Calculation Cards**



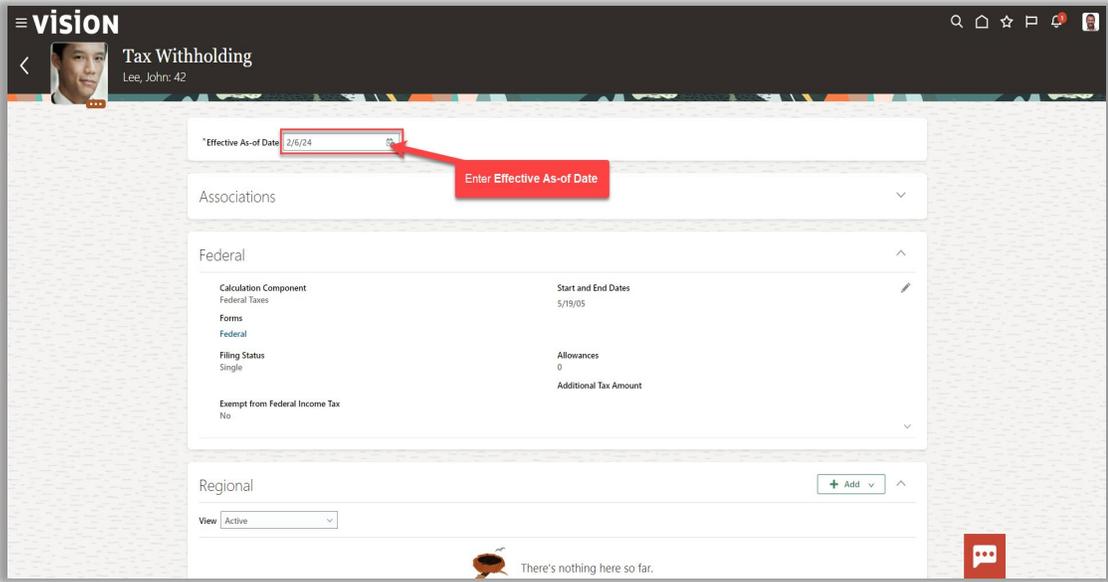
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



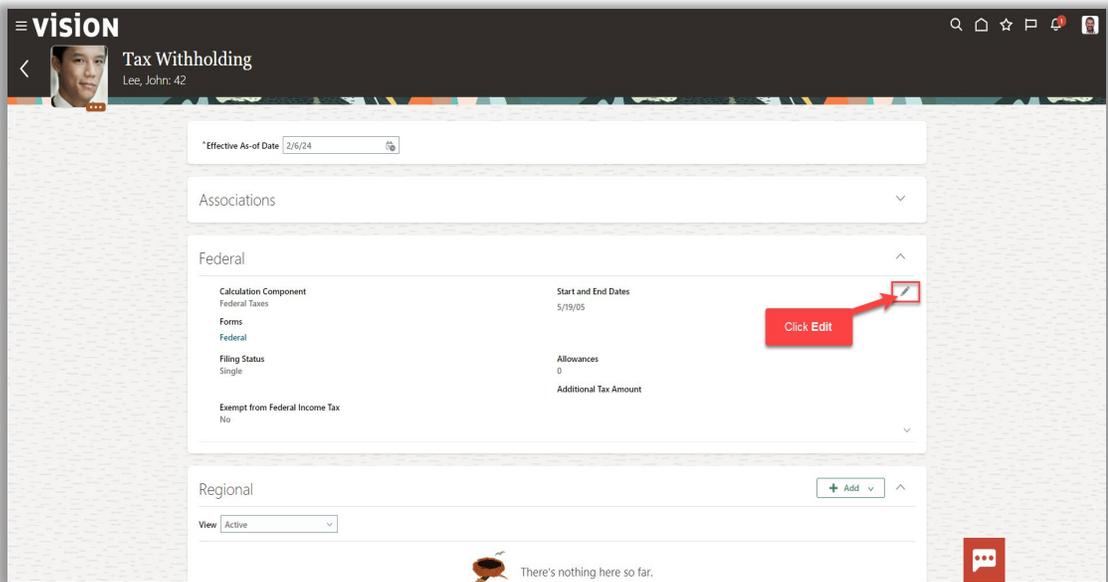
Click Tax Withholding



Enter the Effective As-of Date



Click Edit



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

VISION
Federal Taxes

Delete Save and Close Cancel

Click Save and Close

Basic Information

Calculation Component Federal Taxes	Forms Federal
--	------------------

Component Sequence
1

*When does this change start?
2/6/24

Withholding Status

Update the applicable information below

Step 1: Enter Personal Information
Note: 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.

*Filing Status
Single or Married filing sep

Complete Steps 2-4 ONLY if they apply to you. Otherwise, skip to Step 5.
See form page 2 for more information on each step, who can claim exemption from withholding, other details, and privacy.

Step 2: Multiple Jobs or Spouse Works
Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following:
(a) Reserved for future use.
(b) Use the Multiple Jobs Worksheet on form page 3 and enter the result in Step 4(c) below or
(c) If there are only two jobs total, you may check this box. 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 than half of the pay at the higher paying job. Otherwise, (b) is more accurate.

Multiple Jobs

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

VISION
Tax Withholding
Lee, John: 42

*Effective As-of Date 2/6/24

Associations

Federal

Calculation Component Federal Taxes	Start and End Dates 5/19/05
Forms Federal	
Filing Status Single	Allowances 0
Exempt from Federal Income Tax No	Additional Tax Amount

Regional + Add

View Active

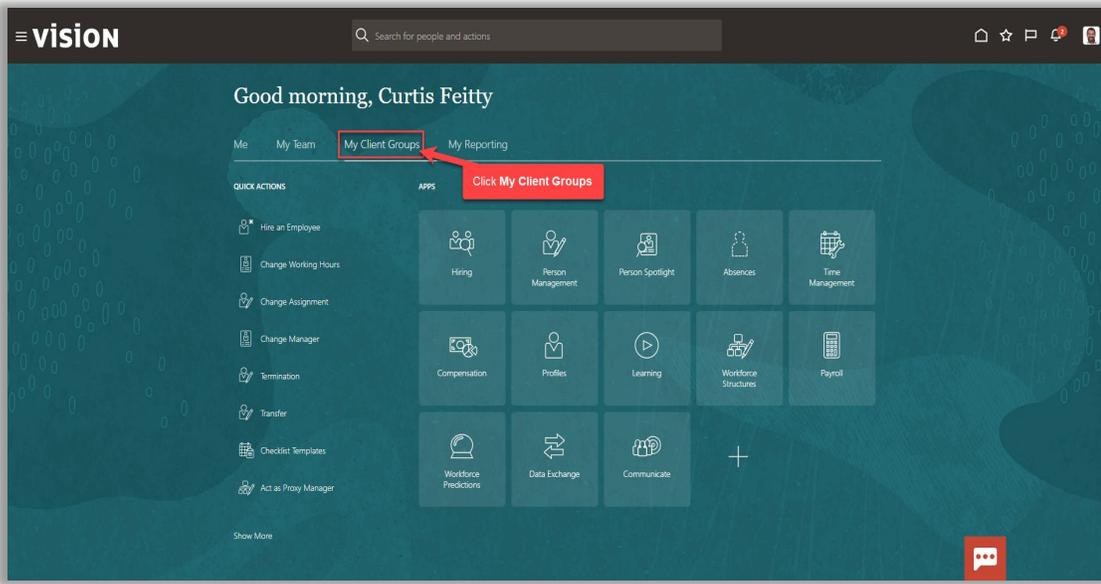
There's nothing here so far.

Click Federal

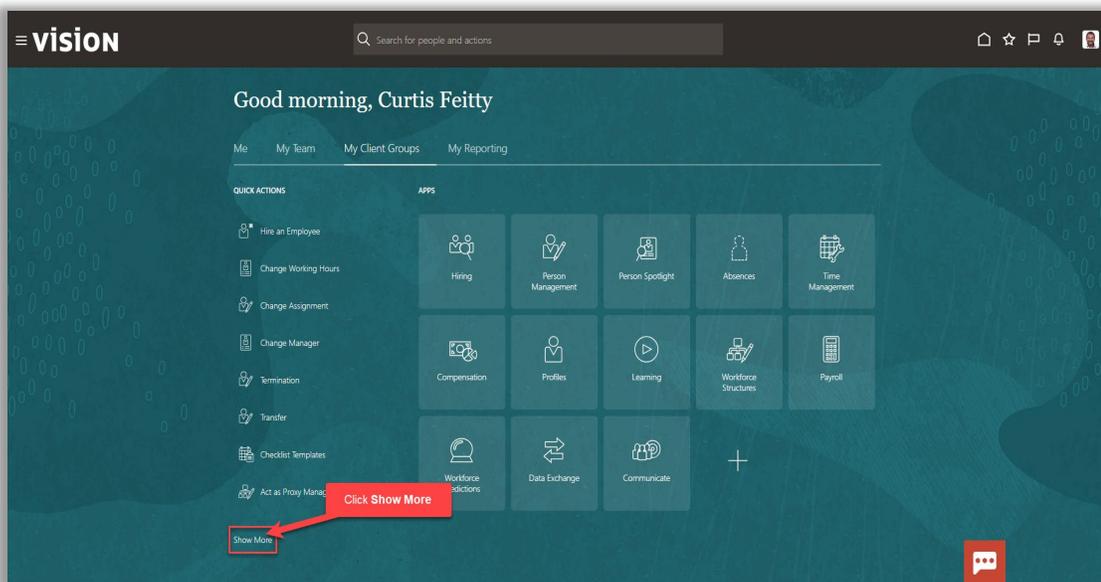
Update Employee's Direct Deposit

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

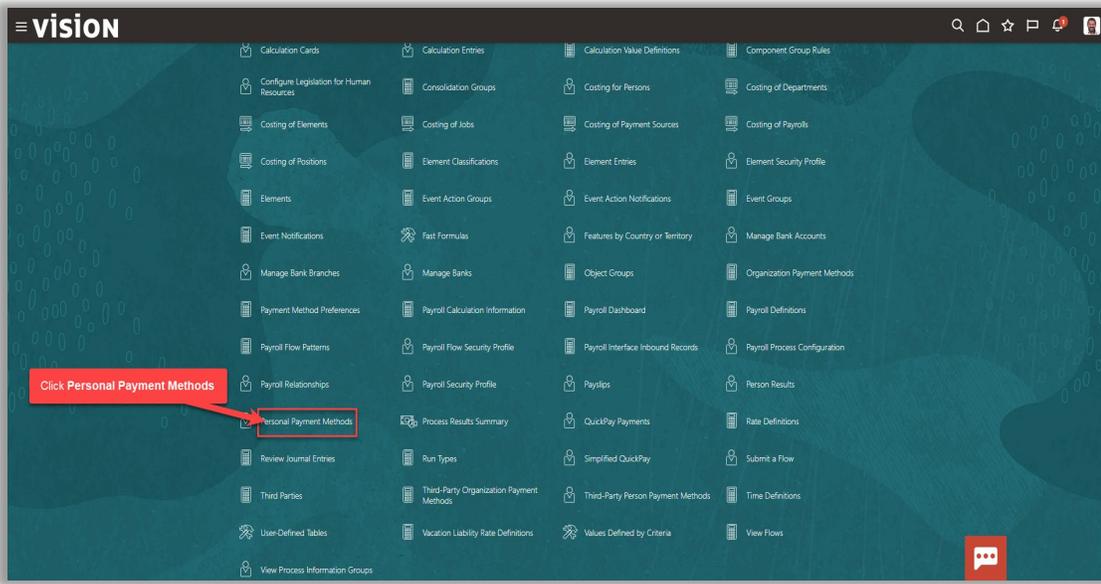
From the home screen, click **My Client Groups**



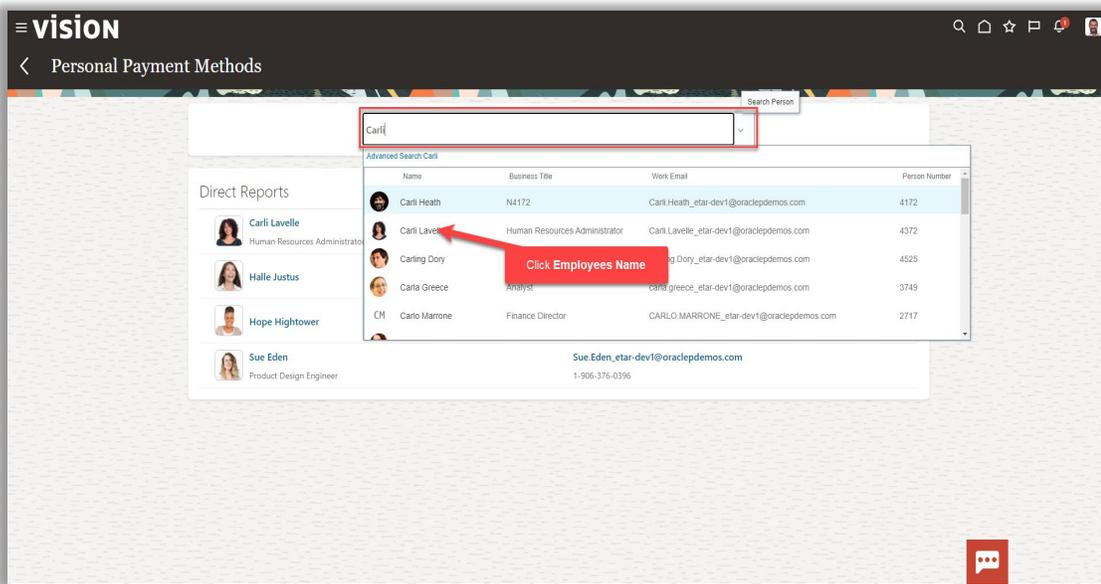
Next, click **Show More**



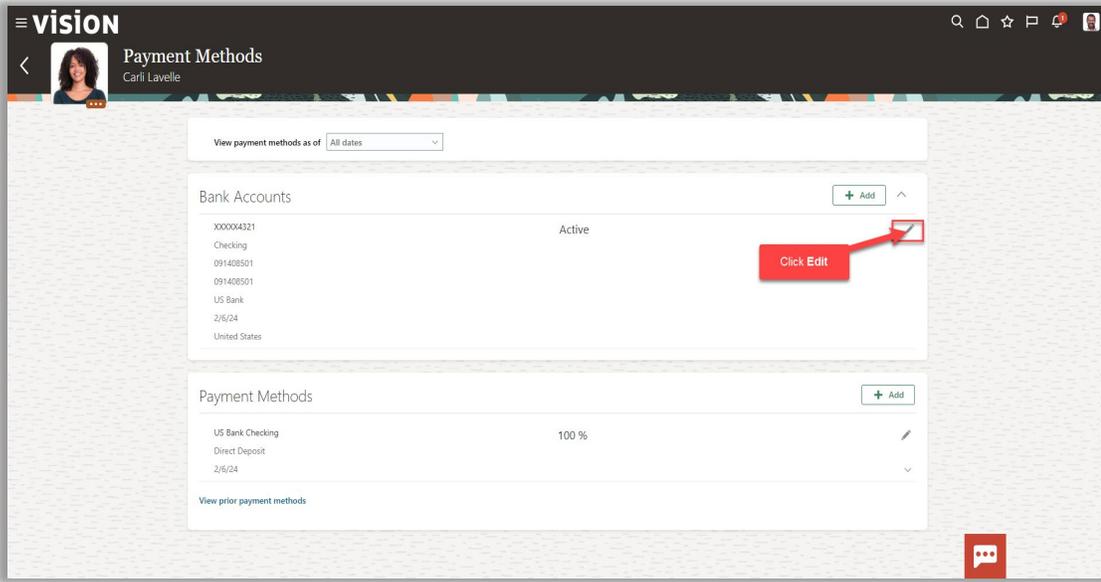
Under Payroll, click **Personal Payment Methods**



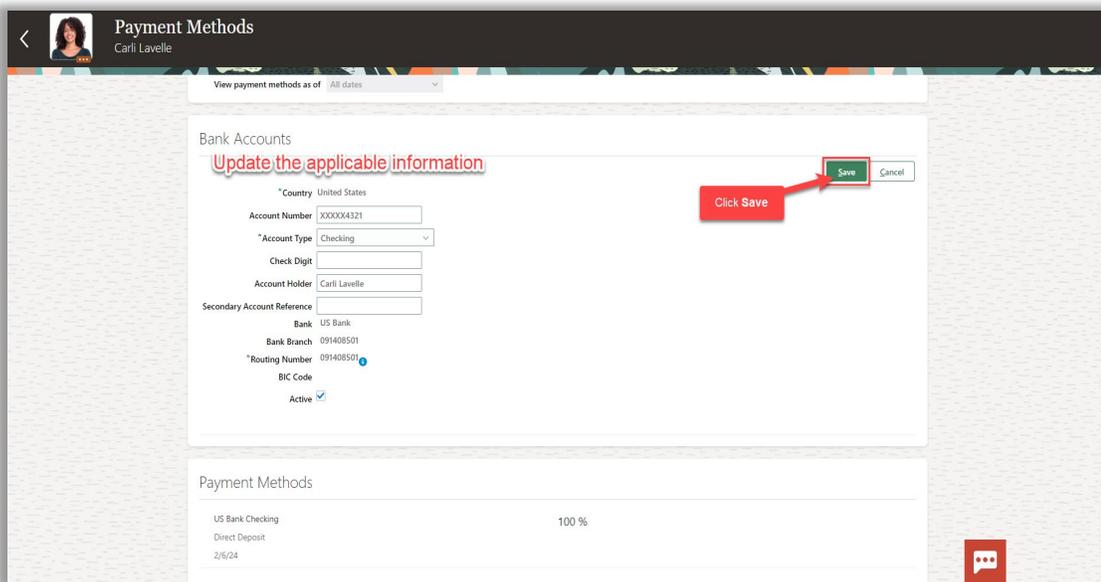
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



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

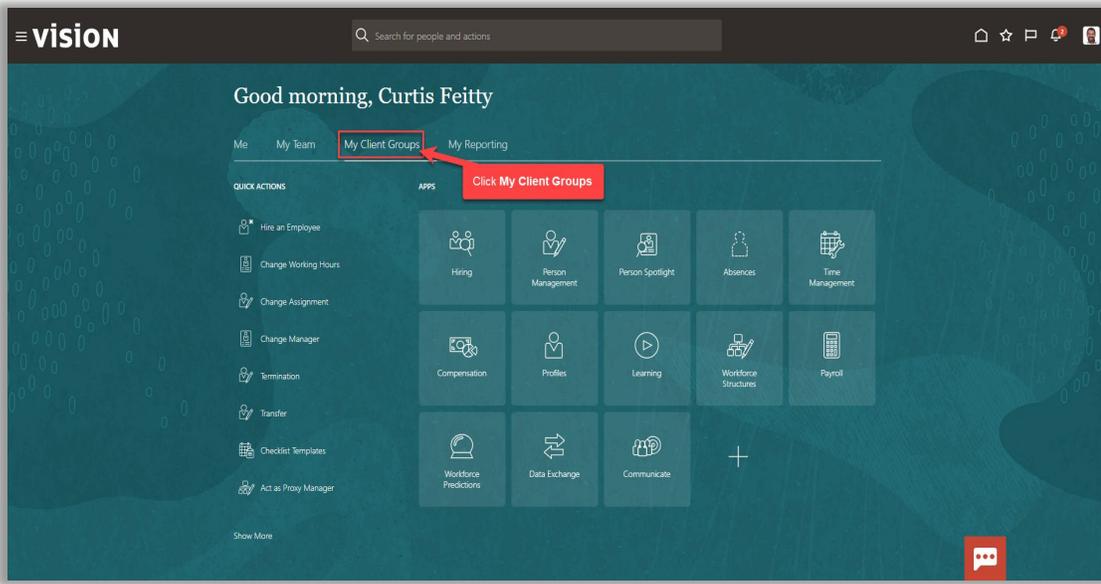


Update the applicable information. To deactivate this account, deselect the active checkbox. Click **Save**

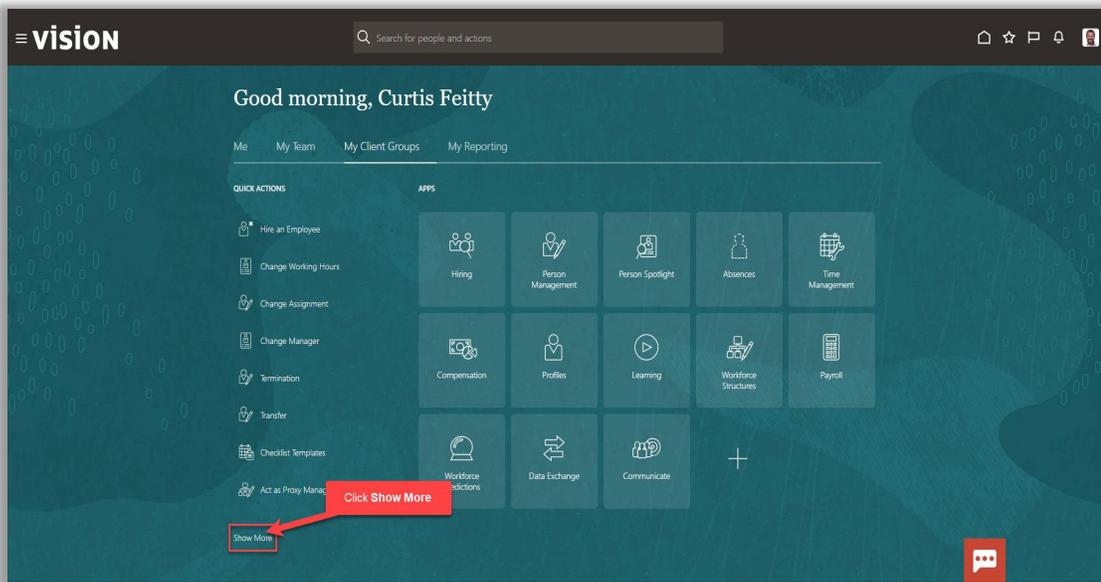


Add New or Additional Employee's Direct Deposit Account
 Navigation: Home>My Client Groups>Show More>Personal Payment Methods>Search Person>Edit>Update Information>Submit

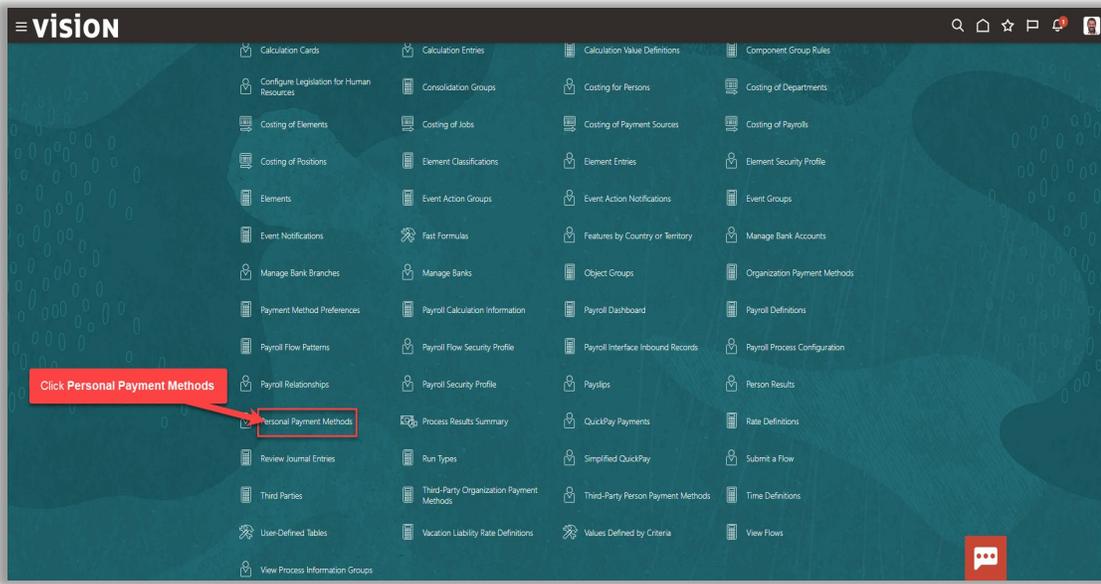
From the home screen, click **My Client Groups**



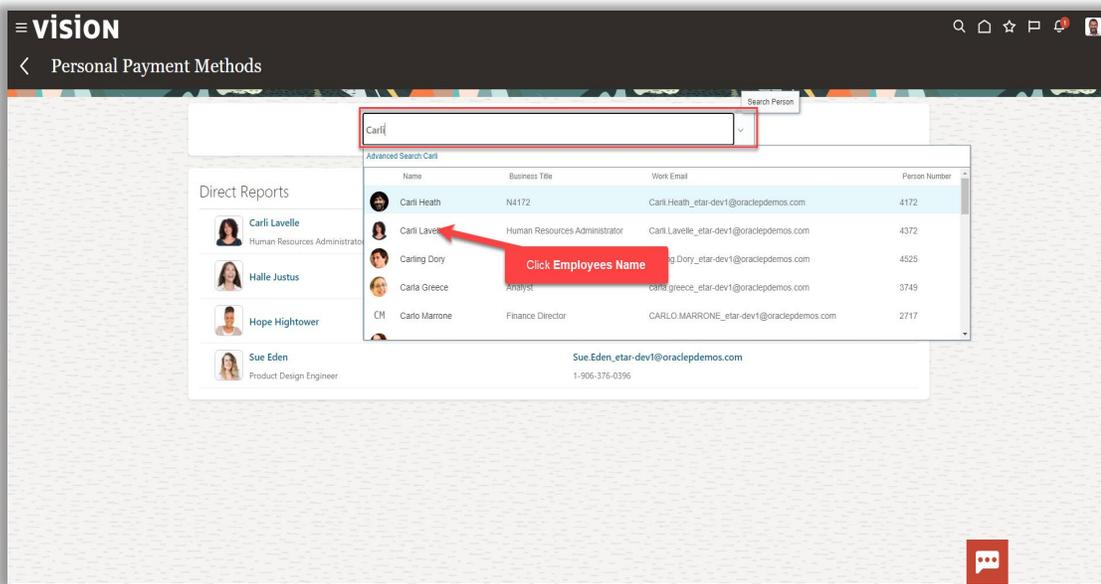
Next, click **Show More**



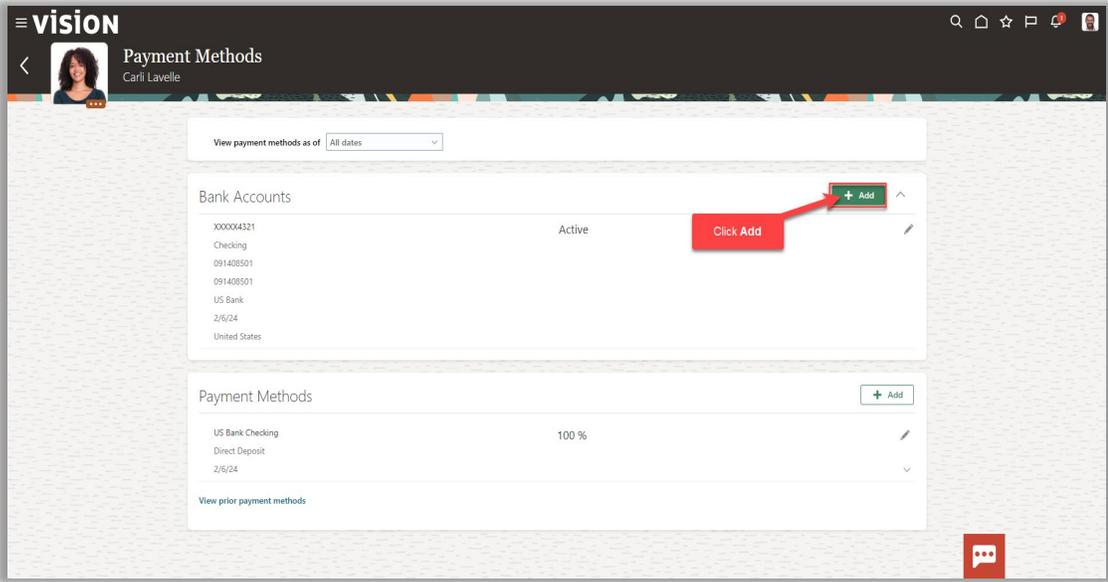
Under Payroll, click **Personal Payment Methods**



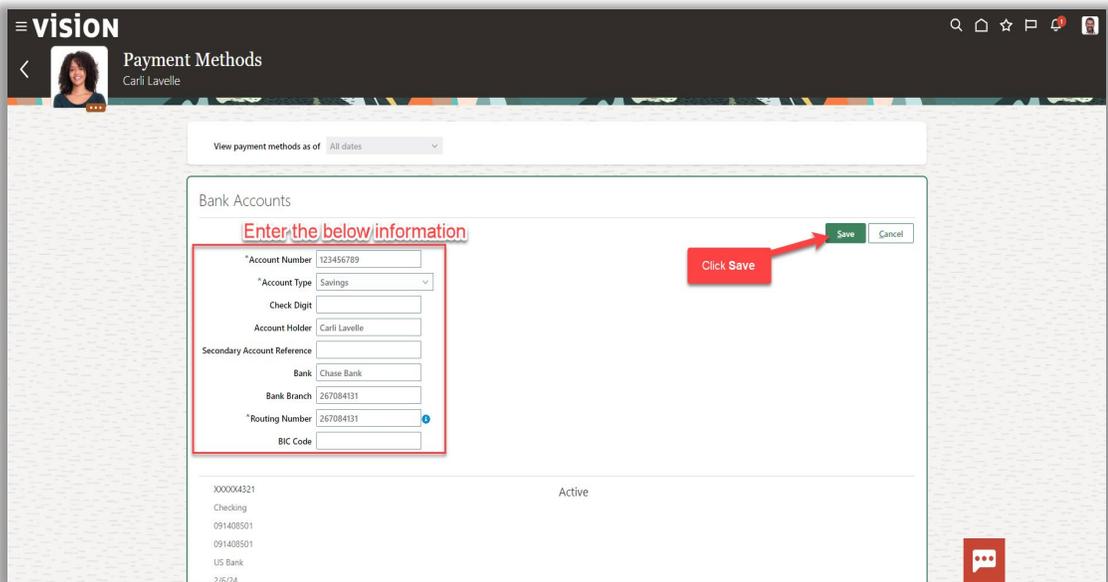
Enter the employees name in **Search for a Person** box, once the employees' name is shown, click the employees' name



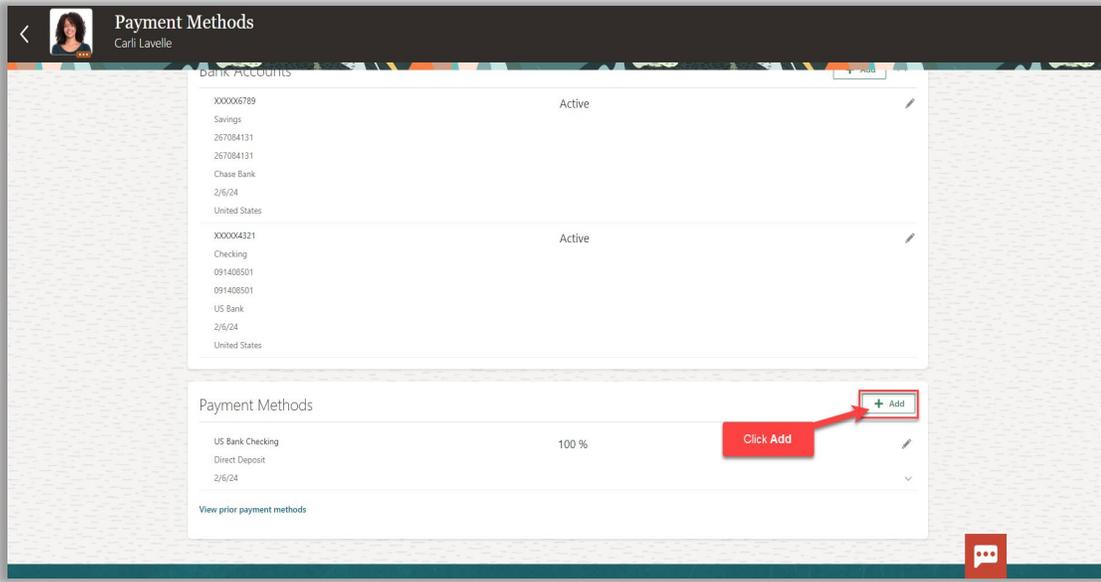
Click **Add** to add a new Bank Account



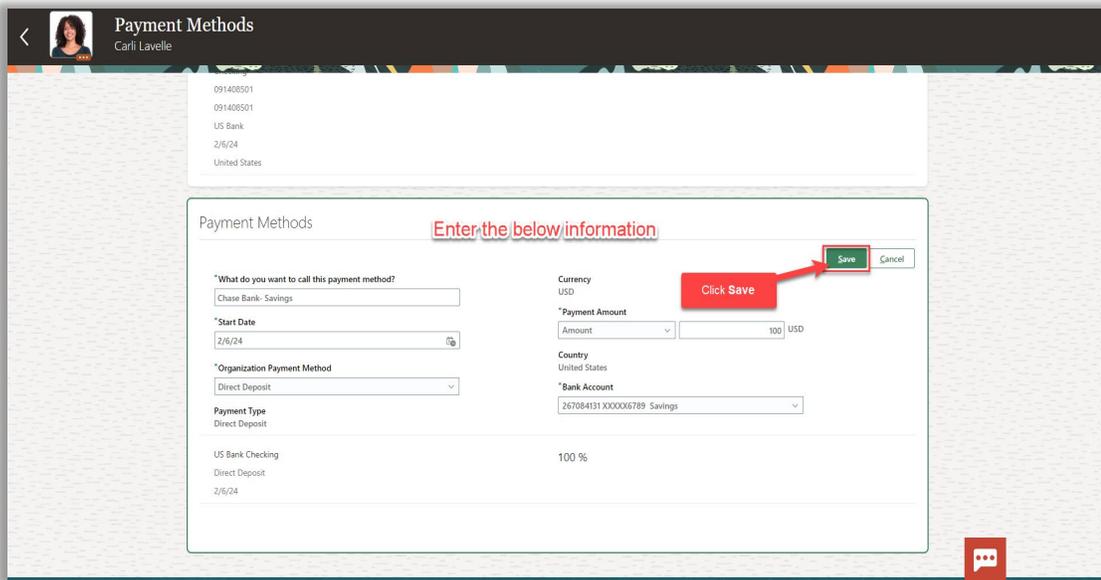
Enter the Account Number, Account Type, Bank, Bank Branch, and Routing Number and click Save



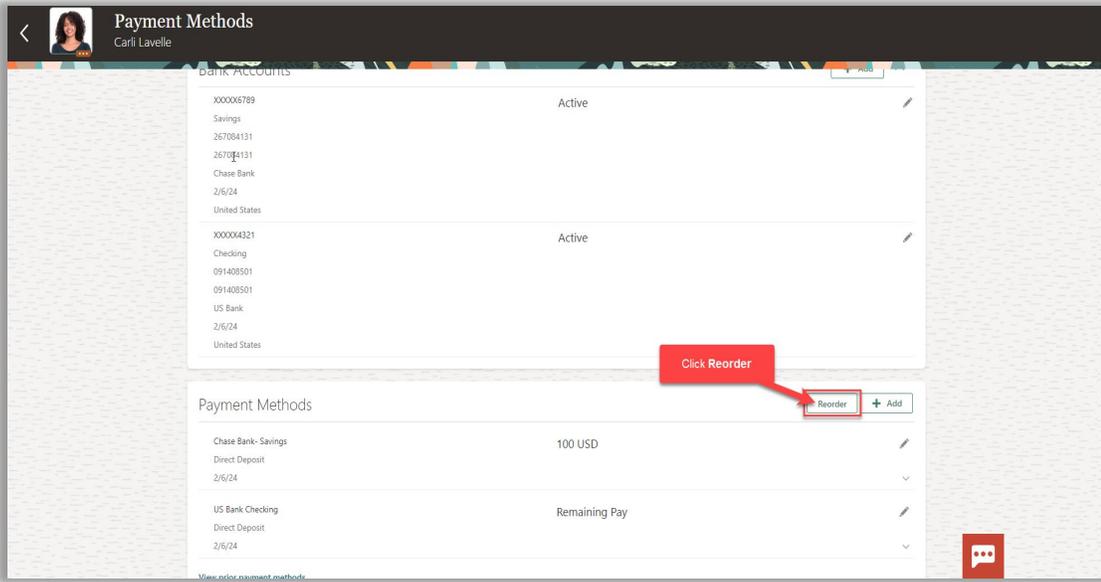
Under Payment Methods, click Add



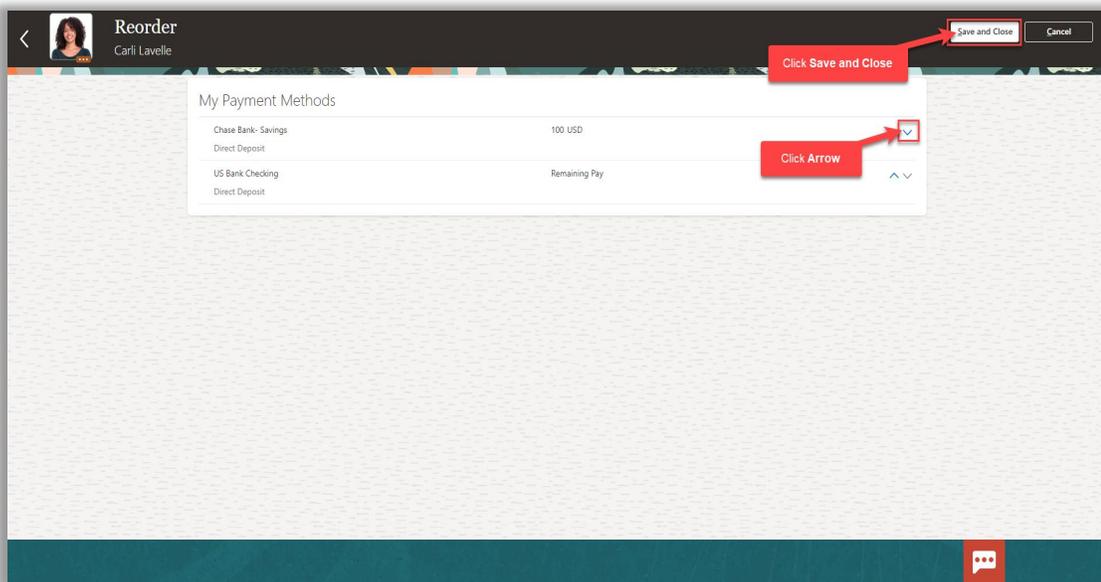
Here we can add the Payment Method Information. We can enter a percentage or a Flat Amount that we want deposited into this account. Click **Save**



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.



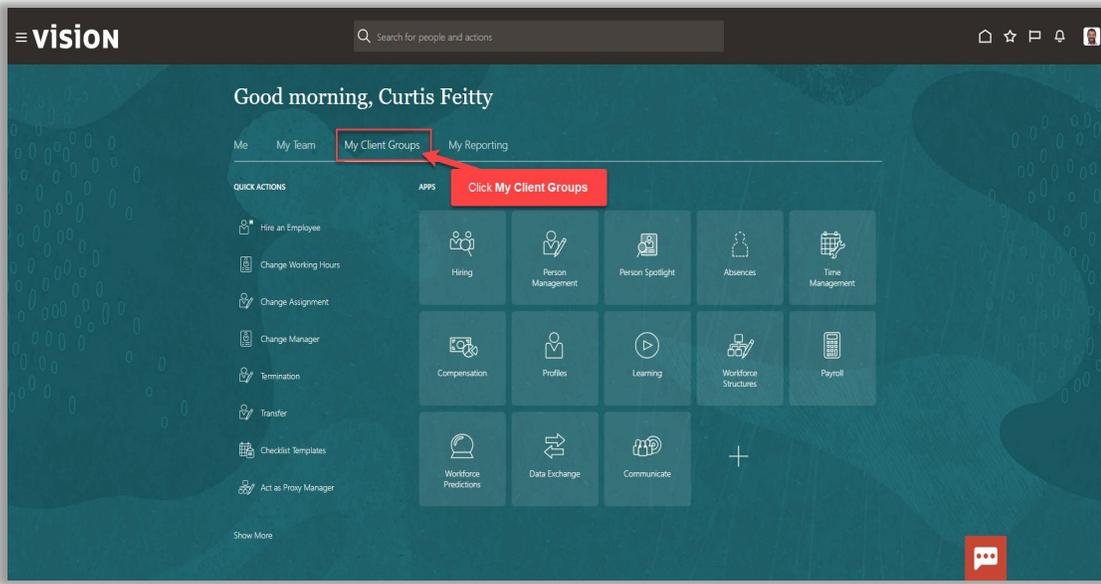
We can use the **Arrows** to change the processing order of the Payment Methods and click **Save and Close**



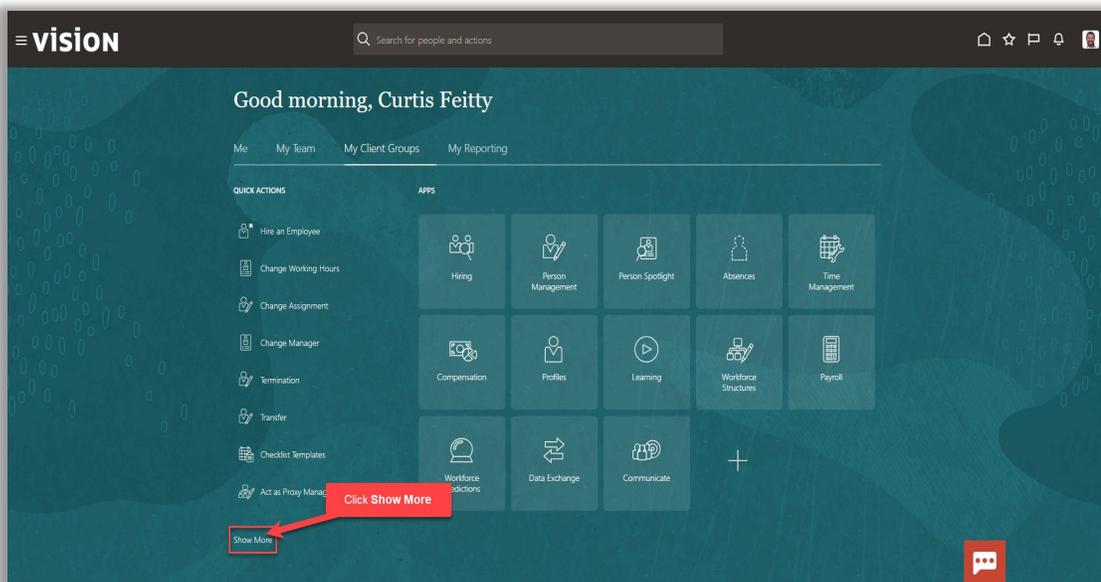
Assign Areas of Responsibility To An Employee

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

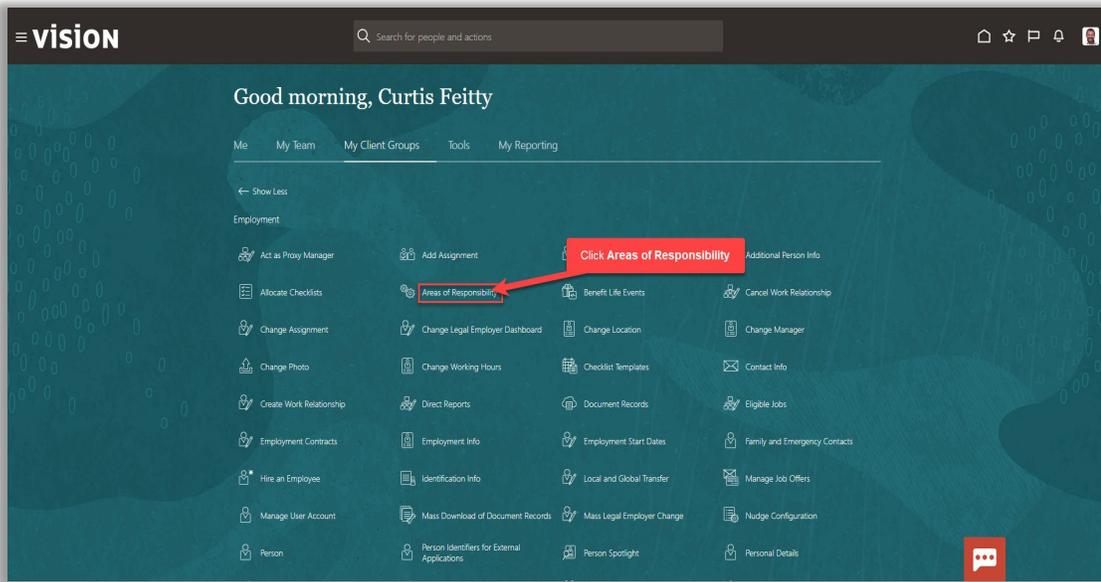
From the home screen, click **My Client Groups**



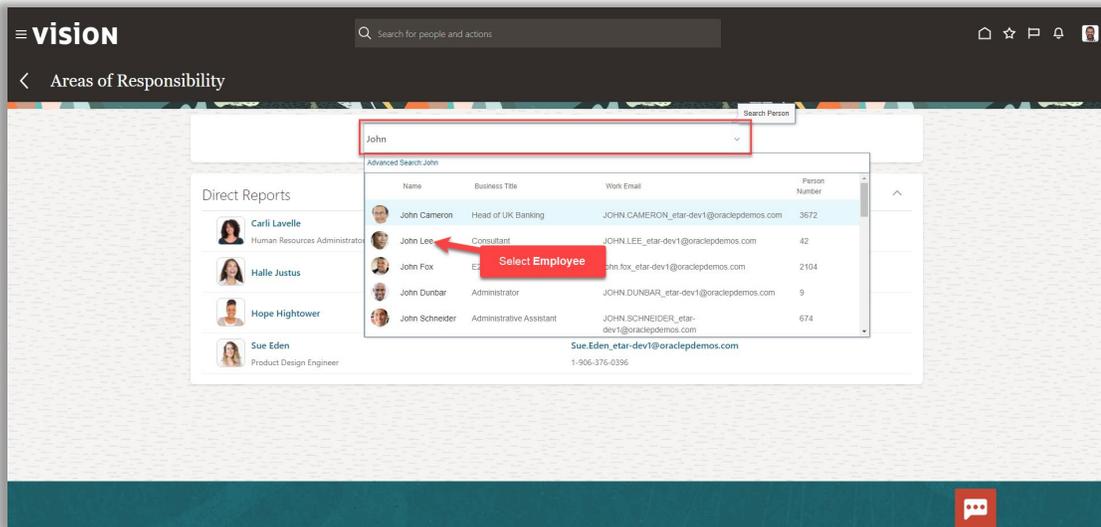
Next, click **Show More**



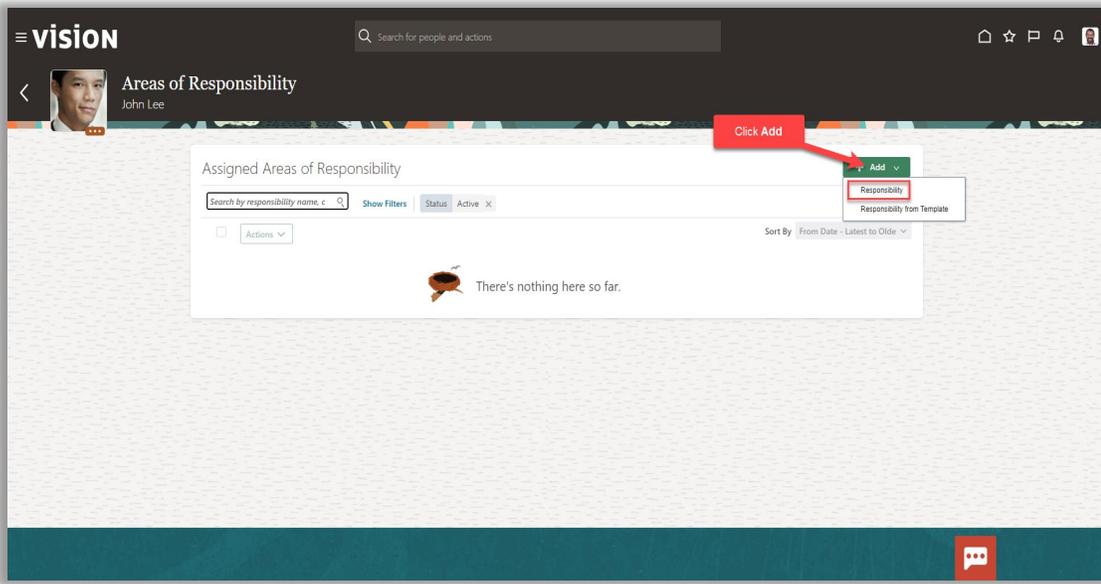
Scroll down and under **Employment**, click **Areas of Responsibility**. As a note, we can search **Areas of Responsibility** by clicking Ctrl F



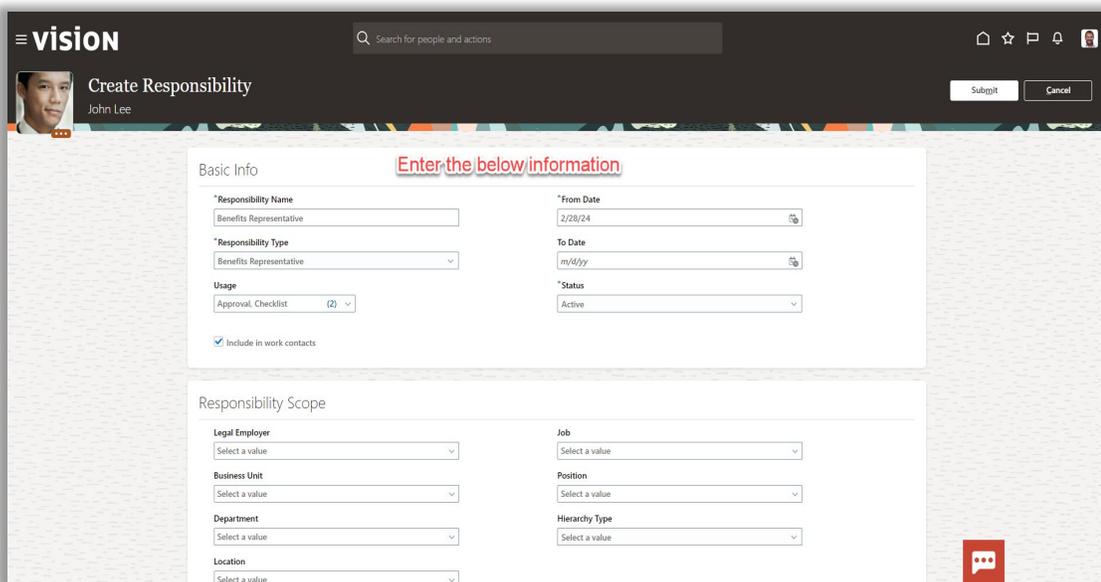
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Click **Add** then **Responsibility**



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.



Next, we'll enter the **Responsibility Scope**. We'll enter the applicable information based on our configurations

Create Responsibility
John Lee

Include in work contacts

Responsibility Scope Enter the below information

Legal Employer
US1 Legal Entity

Business Unit
Federal US Business Unit

Department
Select a value

Location
Select a value

Job
Select a value

Position
Select a value

Hierarchy Type
Select a value

Comments and Attachments

Comments

Attachments

Drag files here or click to add attachment

Submit **Cancel**

Once we have entered the information, click **Submit**

vision Search for people and actions

Create Responsibility
John Lee

Click Submit

Basic Info

***Responsibility Name**
Benefits Representative

***Responsibility Type**
Benefits Representative

Usage
Approval, Checklist (2)

Include in work contacts

***From Date**
2/28/24

To Date
m/d/yy

***Status**
Active

Responsibility Scope

Legal Employer
US1 Legal Entity

Business Unit
Federal US Business Unit

Department
Select a value

Location
Select a value

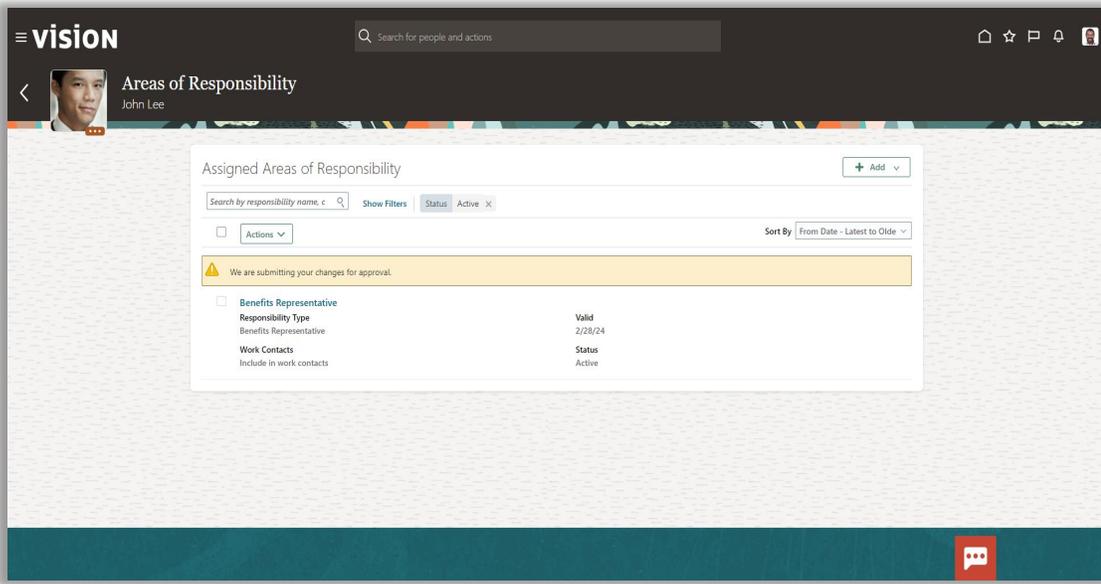
Job
Select a value

Position
Select a value

Hierarchy Type
Select a value

Submit **Cancel**

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.



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 History	Revision 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