HR-Human Resources

UHR Employee Development

Created August 12, 2013
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HR-Human Resources

The Integrated System's Human Resources modules, collectively referred to as the Human Resources Management System (HRMS), allow you to view and process HR data based on your responsibility, which include the following:

1. **HRMS Viewers** - view employee information
2. **HRMS Specialists** - enter new faculty and students, update employee information, and run departmental HRMS reports
3. **HRMS Faculty/Staff Reviewers** - review faculty and staff hires and salary changes
4. **HRMS Student & Faculty Wage Approvers** - approve student and faculty wage hires and salary changes

Note that the HRMS Specialist and Faculty Staff/Reviewer responsibilities are removed while Human Resources runs payroll. Check the Payroll System Availability ([http://www.hr.virginia.edu/calendars/hrms-payroll-system-availability/](http://www.hr.virginia.edu/calendars/hrms-payroll-system-availability/)) calendar for the dates/times the responsibility will be disabled.

At the completion of this module, depending on your responsibility and the needs of your department, you will be able to:

1. View departmental HR information
2. Approve salary actions
3. Use date-tracking
4. Hire salaried Faculty employees
5. Hire University Executive staff
6. Hire student and professional research staff wage employees
7. Hire non-UVa employees
8. Hire postdoctoral fellow employees
9. Hire non doctoral fellow employees
10. Hire GRA/GTA, and faculty wage (Goal Payment) employees
11. Rehire ex-employees
12. Maintain employee information
13. Maintain assignment information
14. Use views and reports

**Please note:** Departmental business processes are beyond the scope of this training. Please consult your departmental HR for information regarding policies and practices in your area. General policies for faculty and students are located on the Provost's website ([http://virginia.edu/provost](http://virginia.edu/provost)). Policies for staff employees are on the central Human Resources website ([http://hr.virginia.edu/](http://hr.virginia.edu/)).

To navigate to a training topic:

1. Double-click on "HR-Human Resources".
2. Double-click on the section(s).
3. Click on the topic.
4. Click "Try It" to interact with the simulation. Click "Print It" to print out a job aid.

**Approving Salary Actions**

In the Integrated System, the following responsibilities have the ability to approve salary actions:

1. UVA HRMS Staff Approver
2. UVA HRMS Student and Faculty Wage Approver
3. UVA HRMS Faculty Approver

At the completion of this section you will be able to approve salary actions. The process consists of three steps:

1. Running the *HR_Approvals for Hires and Salary* report.
2. Querying the Salary Management report by department organization.
3. Approving all salary actions.*

*If you need to approve salary actions for a future date you need to date-track to that date (see topic).

**Running the HR_Approvals for Hires and Salary Changes Report**

Discoverer is used to run reports in the Operational Data Store (ODS). The ODS is a nightly copy of the IS database. Custom reports are created in Discoverer and may be run by anyone with access to the ODS.

The default responsibility is UVa ODS Specialist. If your responsibility is:

- *ODS Specialist-Limited* OR
- *ODS Specialist-Restricted* OR
- *ODS Specialist-Limited PLUS*

You will have to log in by appending the role with a dash (-) and the suffix as seen in the bullets above.

The specific HR report run to view the salaries to approve is *HR_Approvals for Hires and Salary Changes*. It displays information entered as of 5 p.m. the previous day.

**Procedure**

In this exercise you will run the HR_Approvals for Hires and Salary Changes report.
Step | Action
--- | ---
1. | Begin by logging into Discoverer and clicking the **Browse** button.

![Image of Discoverer interface](image1.png)

![Image of available workbooks](image2.png)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2.   | **Scroll to the workbook.**  
<p>|      | Click the <em>vertical</em> scrollbar. |
| 3.   | <strong>Select the</strong> <a href="#">HR_Approvals for Hires and Salary Changes</a> <strong>report.</strong> |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>To run the query, click the <strong>Yes</strong> button.</td>
</tr>
</tbody>
</table>
### Step 5

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>The <strong>Edit Parameter Values</strong> window displays. The <strong>Description</strong> area contains values for each employee type of salary action.</td>
</tr>
</tbody>
</table>

![Image of Edit Parameter Values window](image.png)

### Step 6

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>In this exercise, run the report for student and faculty wage salary actions. Enter the desired information into the <strong>Enter an employee type</strong> field. Enter &quot;'1'&quot;.</td>
</tr>
</tbody>
</table>

---

**Page 6**
Step | Action
--- | ---
7. | Enter your org code in the **Pick an organization** field, followed by the wild card. Enter ‘**31815%**’. 
8. Click the **OK** button.

```plaintext
OK
```
9. The report shows the current salary actions for org code ‘31815’.

**Note for Faculty Salaried Approvers:** Faculty salaried actions have an extra step: the HRMS Faculty/Staff Reviewer in each department reviews the actions before approval.

Once the department has reviewed and approved the salary, the **Reviewed** column will display a ‘Y’ for each person.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td><strong>Salaried staff</strong> actions are approved by Human Resources and are not reviewed by the department. Salary is discussed with the department and agreed upon during the Jobs@UVa process to hire, change hours, etc.</td>
</tr>
</tbody>
</table>
11. Scroll to the **Salary Change Date** column.

   Click the horizontal scrollbar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 12.  | Here the latest future salary change date displays.  

**Important Note:** If a salary change date is beyond today's date, date-track to the latest future date before approving your salary actions.  

If you do not date-track to the future date your query will return the salary records that are effective as of today's date or before.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | All approvals must be performed before the payroll deadline for the pay period effective date. The employee will NOT be paid if the salary is not approved.  

The Payroll Calendar ([http://www.hr.virginia.edu/calendars/2013-payroll-calendar/](http://www.hr.virginia.edu/calendars/2013-payroll-calendar/)) displays the deadline date for all pay periods in the **Last Day Dept Enter OTL, LD, & Approve Hires** column. In this example, the 17-Jun-2013 salary actions have to be approved by 01-Jul-2013. |
Step | Action
--- | ---
14. | Congratulations! You have completed the simulation for **Running the Approval for Hires and Salary Changes Report.**
| **End of Procedure.**

**Date-tracking for Salary Approvals**

When you log into HRMS the effective date is always today's date. To view information from a different date you must change the effective date.

![Image of date-tracking interface]

When you set an effective date for your salary action, date-tracking ensures that only information effective on that date is used for any processing and validation. To approve salary actions for a date that is beyond today's date you must first date-track to that future date.

**Procedure**

In this exercise you will change the date-track date to one in the future.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **People** form.  
    Click the **UVA HRMS Student & Faculty Wage Approver** link. |
2. Click the People View link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td><strong>The People window displays, along with a Decision box.</strong>&lt;br&gt;&lt;br&gt;If the date displayed is the date you want to use for salary approvals, select <strong>No</strong>.&lt;br&gt;&lt;br&gt;To change to a future effective date, click the <strong>Yes</strong> button.</td>
</tr>
</tbody>
</table>

![Oracle Application screenshot showing the People window with a Decision box and options to select Yes or No for effective date.]

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td><strong>Enter the new effective date.</strong>&lt;br&gt;&lt;br&gt;Press <strong>[Delete]</strong>.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>5.</td>
<td>In this exercise, the &quot;future&quot; date is 17-Jun-2013. As long as the date-tracked date is on or after the effective date of the salary action, the record(s) will display when queried. Enter the date in this format: <strong>dd-mmm-yyyy</strong>. Enter &quot;<strong>17-Jun-2013</strong>&quot;.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
7. Verify that the new date displays on the title bar of the People form.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>In the next topic you will perform approvals via the <strong>Salary Management</strong> form. Click the <strong>Close</strong> button.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Close</strong> button.</td>
</tr>
</tbody>
</table>
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UHR Employee Development

Step | Action
--- | ---
10. | Congratulations! You have completed the simulation for **Date-tracking for Salary Approvals. End of Procedure.**

**Approving a Salary Action**
The person who enters the salary record can also change information but cannot update the Add'l Salary Admin. Details form or the Approved checkbox on the Salary Administration or Salary Management form.

The person reviewing the salary proposal can enter and change information and update the Add'l Salary Admin Details form but not check the Approved checkbox on the Salary Administration or Salary Management form.

The final approver can approve salary proposals via the Salary Management form but cannot enter/change information or update the Add'l Salary Admin. Details form.

As the **final approver** you will:

1. Review the records on the Salary Management form
2. Erase records that will not be approved
3. Select and approve all remaining records
4. Contact the department to discuss any actions not approved

**Procedure**
In this exercise you will approve student and faculty wage salaries for org '31815'.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Salary Management** form.  

Click the **UVA HRMS Student & Faculty Wage Approver** link. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Salary Management</strong> link.</td>
</tr>
</tbody>
</table>

**Salary Management**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | The **Salary Management** form displays. It contains a built-in query that searches for salary proposals requiring your approval.  

**Find all records in this folder?**  
- Click 'Yes' to find all unapproved salary proposals. This query may take a few minutes to run, please be patient.  
- Click 'No' to search for a particular unapproved salary proposal (recommended).  

In this exercise, you want to view only unapproved salary proposals for org '31815'.

Click the **No** button. |
| 4.   | To select search criteria:  

Click the **View** menu. |
5. Click the **Query By Example > Enter** list item.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Enter search criteria to find a particular salary proposal or group of salary proposals. In this exercise, you want to search by org code. In the <strong>Organization</strong> field, enter the org code followed by the (%) wild card. Enter <strong>31815%</strong>.</td>
</tr>
<tr>
<td>7.</td>
<td><strong>To run the query:</strong> Click the <strong>View</strong> menu.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>Query By Example &gt; Run</strong> list item.</td>
</tr>
</tbody>
</table>

---

**Run**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>The salary proposals to be approved display. You can scroll horizontally to review all columns of information.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 10.  | **To remove records:**  
If you do not want to approve one or more of the salary proposals, place your cursor in front of the salary proposal to remove and click the **Clear Record icon** on the toolbar.  
**Notes:**  
• Removing salary proposals from this window does not delete them from the database, just from view on this form. Contact the HRMS Faculty/Staff Reviewer or HRMS Specialist for the department to change or delete the salary change proposal.  
• If a person displays on the Discoverer report but not in this list, contact your HRMS Faculty Staff/Reviewer or HRMS Specialist to correct the person’s record. |
There are two methods of approving your salary proposals:

1. Individually - place your cursor on a row and click the **Approve** button. Repeat for each row.
Step 12. (2) All (recommended) - click the Edit menu.

Edit
13. Click the Select All list item.
Step | Action
--- | ---
14. | All of the salary proposals are highlighted. Click the **Approve** button.

15. | The message on the toolbar displays the number of approved records and any failed records.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>We have scrolled to the far right to show you the <strong>Approved</strong> column’s check boxes. <strong>If a record is incomplete:</strong> the process will approve all records located above the incomplete record. To clear the record from the view, select the record’s row and click the <strong>Clear Record</strong> icon. Request the department verify all required fields are entered, then re-query and approve again.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 17.  | **When all records are complete:** the Approved column checkboxes show that all records were approved.  
In this exercise the incomplete record has been fixed and you have queried and approved the salary proposals. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.</td>
<td>Congratulations! You have completed the simulation for <strong>Approving a Salary Action</strong>. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>