Employee Search and Online Help
Human Resources Front End
How-To Guide

HR Front End Training Team
Employee Search and Online Help

HR Front End

How-To Guide

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APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Similar to Banner, HRFE allows you to access confidential and sensitive information. Guidelines have been created to help you manage your responsibility.

You are responsible for any activity that occurs using your logon
• Do not share your passwords or store them in an unsecured manner.
• Do not leave your workstation unattended while logged on to administrative information systems.

You have access to very sensitive personal information
• Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
• Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
• Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
• Shred the documents in a timely manner when disposing of reports containing confidential or sensitive information.

Any violation could subject you to disciplinary action.

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HR Front End Employee Search and Online Help  Quick View

1. Using the UIN Quick Search
2. Employee Search Screen
3. Employee Search User Preferences
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**Introduction**

This training guide covers the Employee Search feature of the HR Front End system, and setting Employee Search User Preferences. Employee Search is a tool used to locate employee records using a variety of criteria, such as the UIN, Name, or College of the employee.

**Conventions Used in this Guide**

- Indicates a **Note** or additional information that might be helpful to you.
- Indicates a **Hint** such as a tip, shortcut, or additional way to do something.
- Indicates a **Warning** of an action that you should not perform or that might cause problems in the application.
Locating an Employee Record – UIN Quick Search

There are several ways that users can locate individual employee records in the HR Front End. Users can locate an employee record by:

1. Click HOME link on the Menu Bar.
2. Entering the employee UIN in the UIN Quick Search feature
3. Click Search

   Employee Record View is displayed.

HINT: Entering a UIN in the UIN Quick Search will take users directly to the Employee Record View.

Figure 1: Searching for an Employee Record
Locating an Employee Record – Employee Search

Use the Employee Search screen to locate employee records using the UIN or other search criteria, such as Name, User ID, or Home Org information.

1. Click Employee Search from the Menu Bar.

2. Enter the desired search criteria in the appropriate fields.

   - UIN - University Identification Number
   - Last Name – employee’s last name
   - First Name – employee’s first name
   - USERID – employee’s user id
   - SSN – employee’s social security number
   - COA - Chart of Account
   - College
   - Department
   - Organizations
   - Campus
   - Employee Group

3. Check / Uncheck the Include Terminated Employees box.

4. Click Search

   Search results are displayed.

**Figure 2: Employee Search**

**NOTES:** When using the Employee Search, you must specify

- COA and College OR
- UIN, Last Name, First Name, UserID, and/or SSN

If a value is entered in the UIN field, the system will only search for the UIN.
HINT: To erase the search criteria and results and begin a new search, click Reset.

**Figure 3: Employee Search Results Screen**

5. Click on the desired row, then click **Select**.

   *Employee Record is displayed for desired employee.*
Employee Search User Preferences

User Preferences in the HR Front End allow users to customize certain settings as they relate to Employee Search. This section will cover setting user preferences for Employee Search Defaults and Employee Search Columns.

**NOTE:** For instructions on User Preferences for In/Outboxes, see the In/Outbox How-to Guide.

Setting User Preferences for Employee Search

1. Select **Admin Tools** in the menu bar
2. Click **User Preferences**
   *User Preferences window is displayed.*
3. Select Employee Search
   *Employee Search User Preferences are displayed.*

![User Preferences- Employee Search](image)

4. Select the default value for each of the following fields:
   - **COA** - (Chart of Accounts) Selecting a COA will filter the college drop down to be all colleges in the selected chart.
   - **College** – This drop down control contains all the colleges in the selected COA above. The selected college will filter the Department drop down.
   - **Department** – This drop down control contains all the departments in the selected college above. The selected department will filter the Organization drop down.
   - **Organization** – This drop down control contains all the organizations in the selected department above.
   - **Employee Group** – This drop down control contains all employee groups. Select the employee group that you want to set as your default search criteria.
   - **Display Terminated** – If the check box is selected, it will always display terminated employees.
   - **Max Rows** – Maximum amount of rows that can be returned.
   - **Campus** – This drop down control contains all the campuses.
   - **Default View** – Employee Record View (ERV) or Timeline after selecting record from Employee Search.
Once the presets have been selected, users can:

- Click the **Save** button – which will save the settings they have selected, or
- Click the **Cancel** button – which will cancel the changes that they have made, or
- Click the **Restore Defaults** button – which will restore to the system default settings.

Once the changes have been made, users can view the changes by navigating to the Employee Search feature.
**User Preferences – Employee Search Columns**

If the Employee Search Columns option is selected, the screen will refresh and users will be able to choose which columns will be displayed in the Employee Search.

The **Available Columns** contains columns that are not currently displayed in the Employee Search. The **Selected Columns** contains columns that are currently being displayed.

In order to move items from **Available Columns** to **Selected Columns**:

1. Click the item(s) under **Available Columns** to be moved (to select more than one item, hold the CTRL key on the keyboard when selecting the items).
2. Click the arrow button to move the items.
3. Once the items have been moved from **Available Columns** to **Selected Columns**, the up and down directional arrows can be used to order the items in **Selected Columns** accordingly.
4. Click the:
   - **Save** button to save changes that have been made
   - **Cancel** button to cancel the changes that have been made
   - **Restore Defaults** button to restore to the system default settings

**NOTE:** The UIN and Last Name cannot be moved from the selected columns.

---

**Figure 6: User Preferences – Employee Search Columns**

<table>
<thead>
<tr>
<th>UIN</th>
<th>Last Name</th>
<th>First Name</th>
<th>E-Class</th>
<th>Emp Status</th>
<th>Home ORG</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345678</td>
<td>Doe</td>
<td>John</td>
<td>E-Class</td>
<td>A</td>
<td>U-9-KH001 - WPI Human Resources/Shared</td>
</tr>
<tr>
<td>987654321</td>
<td>Smith</td>
<td>Jane</td>
<td>E-Class</td>
<td>A</td>
<td>U-9-U90000 - AITS Admin</td>
</tr>
<tr>
<td>12345678</td>
<td>Johnson</td>
<td>Mike</td>
<td>E-Class</td>
<td>A</td>
<td>U-5-5H000 - Presidents Office</td>
</tr>
</tbody>
</table>
Using the Online Help Feature

The Online Help feature houses information pertaining to the many functions of the HR Front End. The Online Help feature is accessible to users by simply clicking the Help link in the navigation menu.

![Figure 7: Accessing Online Help](image-url)
Once the **Help** link is clicked the **Online Help** tool appears. Online Help is divided into three sections:

a. Navigation Pane  
b. Toolbar  
c. Content Pane

*Figure 8: Online Help Sections*
Online Help - Navigation Pane

The Navigation Pane allows users to navigate to and from different sections of the Online Help feature. The Navigation Pane contains:

a. Contents – displays contents that users will encounter in the HR Front End
b. Index – provides a topical index to content in the HR Front End
c. Search – allows users to search for HR Front End content within the Online Help Tool
d. Glossary – provides a glossary of terms that are encountered in the HR Front End
e. Favorites – houses the item(s) that a user declares as a favorite for quick reference

Figure 9: Navigation Pane
**Online Help - Navigation Pane - Contents**

The **Contents** section in the Navigation Pane contains information pertaining to the section in the HR Front End that is being accessed. The contents will be listed in the left-hand pane. Once the user clicks on a particular content item, it will be displayed in detail in the right-hand pane.

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**Employee Search**

Use the **Employee Search** screen to find an employee who's record you want to view or edit.

**What do you want to do?**

- Learn more about **Employee Search fields**
- Learn the Business Rules for Employee Search
- Learn Tips and Hints for using **Employee Search**

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*Figure 10: Navigation Pane - Contents*
Online Help - Navigation Pane – Index

The Index section contains a substantial list of topics that pertain to the HR Front End application. If the user needs to search for a particular topic, they may do so by typing the term(s) in the text box to search for that topic within the Index feature. Once the topic of choice has been located and selected in the left-hand pane, the topic(s) is displayed in detail in the right-hand pane.

![Figure 11: Navigation Pane - Index](image)

**Active Employee Found**

The New Hire Active Employee Found screen appears if you select an active employee from the search results page.

You have three options to select from on this screen:

1. **Proceed to ERV**.
2. **Return to the search screen to perform a new search**.
3. **Exit the New Hire Wizard**.

At this point a transaction has not yet been created, so if you decide to close the New Hire Transaction wizard, nothing will be saved to your inbox.

- Click here to view the Active Employee Found screen.

<table>
<thead>
<tr>
<th>Item</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proceed to ERV...</td>
<td>Select this option to use the selected active employee name. Your security profile will be verified to determine your access rights within the view.</td>
</tr>
<tr>
<td>Return to the Search screen...</td>
<td>Select this option to return to your new hire search. The results from your previous search will still remain in the page.</td>
</tr>
<tr>
<td>Exit the New Hire Wizard</td>
<td>Select this option to return to the home page.</td>
</tr>
<tr>
<td>Continue</td>
<td>Continues the transaction with the action selected above.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves the transaction to your inbox.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the wizard without saving any changes and returns you to the homepage.</td>
</tr>
<tr>
<td>Delete Transaction</td>
<td>This button is disabled on this screen.</td>
</tr>
</tbody>
</table>
Online Help - Navigation Pane – Search

The Search section allows users to search for a specific topic(s) pertaining to the HR Front End application. Once the user enters the search criteria into the text box and clicks the search button, the results will populate in the left-hand pane. The items listed will be ranked by relevance. To access any of these topics in detail, the user will click the item in order to populate the right-hand pane with details pertaining to the topic(s) selected.

User Preferences - Employee Search

The User Preferences screen allows you to customize some default Employee Search features in the application.

Employee Search Columns

The Employee Search Columns preferences allow you to customize the order in which the fields appear in the Employee Search results table.

Field Definitions

<table>
<thead>
<tr>
<th>Item</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available Columns</td>
<td>Columns available for display in the Employee Search results table.</td>
</tr>
<tr>
<td>Selected Columns</td>
<td>Columns selected for display in the Employee Search results table.</td>
</tr>
<tr>
<td>Preview Display</td>
<td>Display of the Selected Columns list. The table previews how your Selected Columns will appear in the Employee Search screen.</td>
</tr>
<tr>
<td>Save</td>
<td>Click to save your default preferences for the Employee Search</td>
</tr>
<tr>
<td>Cancel</td>
<td>Exits the screen without saving your changes.</td>
</tr>
<tr>
<td>Restore Defaults</td>
<td>Restores the preferences to the original settings for the system.</td>
</tr>
</tbody>
</table>

Figure 12: Navigation Pane - Search
**Online Help - Navigation Pane – Glossary**

The **Glossary** section contains terms that users will encounter in the HR Front End application and their definitions. Unlike previous features mentioned, the terms selected in the glossary will remain contained in the left-hand pane of the Online Help feature.

![Glossary](image)

*Figure 13: Navigation Pane - Index*
Online Help - Navigation Pane - Favorites

The Favorites section allows users to view any searches or topics that they have marked as favorites while using the Online Help tool. In order to delete a favorite topic or favorite search, users simply need to check to the box next to the topic/search that they wish to delete, and then click the red ‘X’.

Figure 14: Navigation Pane - Favorites
Online Help – Toolbar

The Toolbar provides additional tools for the user’s assistance while using the Online Help tool. Users will encounter the following items on the toolbar:

- **Hide/Show Navigation Area** – clicking this icon will either hide or show the navigation area
- **Go to Home Page** – clicking this icon will take users to the home page in Online Help
- **Refresh** – clicking this icon will refresh the contents displayed
- **Stop** – clicking this icon will stop the action that is currently being performed
- **Print** – clicking this icon will allow users to print the information that is being displayed
- **Add Topic to Favorites** – clicking this icon will add the displayed topic to the favorites section
- **Add/Remove Search Highlighting** - clicking this icon will add or remove search highlighting (which highlights a specific term(s) in the Online Help tool)
- **Show Expanding Text Effects** – clicking this icon will display
- **Hide Expanding Text Effects** – clicking this icon will display
- **Back** – clicking this icon will take users back one screen
- **Forward** – clicking this icon will take users forward one screen
Figure 15: Online Help - Toolbar

Online Help – Content Pane

The **Content Pane** will populate with the selected item(s) that the user selected in the Navigation Pane. This content will change as the user changes the content chosen in the Navigation Pane.

This online help contains information about the HR functions within the application:

- Employee Search
- User Preferences
- New Hire Transaction
- In/Outboxes
- Reapoint/Reactivate Jobs Transaction Wizard
Online Help

This online help contains information about the HR functions within the application:

- Employee Search
- User Preferences
- New Hire Transaction
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Figure 16: Online Help – Content Pane