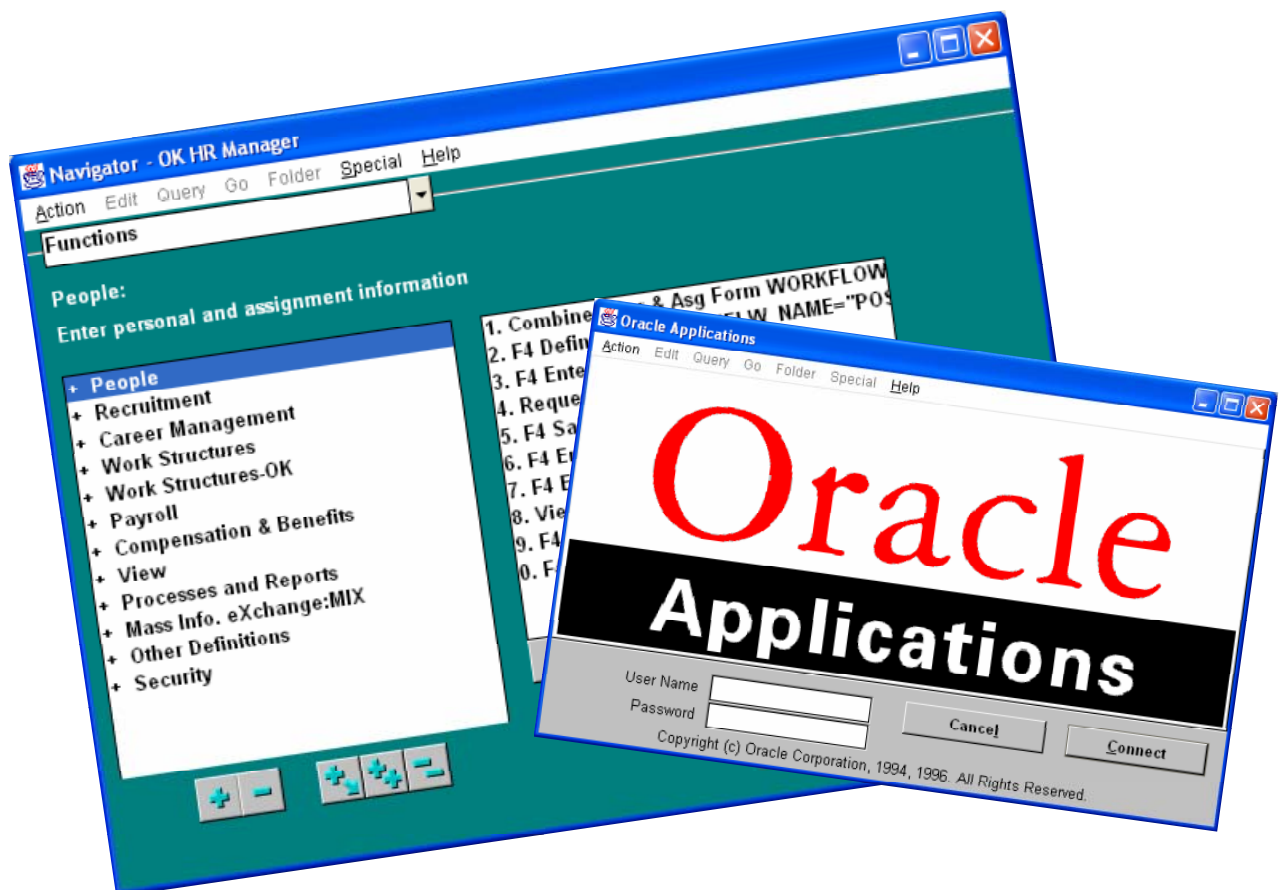




Department of Corrections

Human Resources Management System



User's Guide



Human Resources Management System

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Human Resources Management System

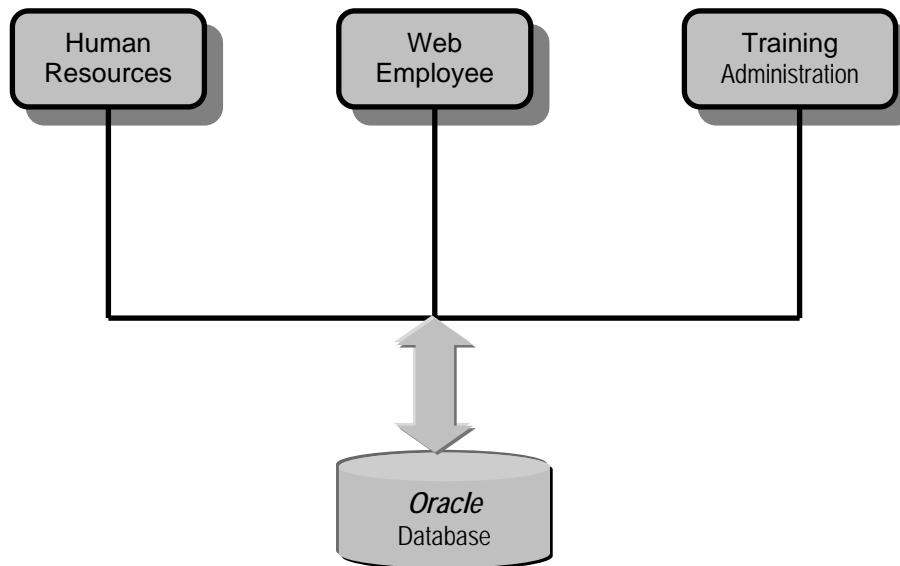
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Human Resources Management System

Introduction

Human Resource Management System



The State of Oklahoma Human Resource Management System is comprised of Oracle Corporation's **H.R.** (Human Resources), **O.T.A.** (Oracle Training Administration) and **Web Employee** Self-Service Applications. The Department of Corrections implemented the Oracle H.R. system on June 21, 1999.

Benefits / Features

- Maintains Human Resources data accessible by central office and field units
- Displays full history of agency changes
- Centralizes backup/recovery process
- Maintains state work history of all staff employed at time of conversion
- Allows viewing/printing of standard reports as needed
- Maintains a record of salary changes and the reason for each
- Maintains custom detailed information such as employee qualifications, discipline, workers compensation, work history, etc.
- Allows viewing of all changes made to date-sensitive information



Human Resources Management System

HRMS Characteristics

Oracle HR Terminology

People

- Current and former employees
- Contacts - A spouse, parent, child, grandparent, sibling, other relative or friend of an employee.

Work Structures

- The employer: Organizations and Locations
- Work role or function: Jobs and Positions
- Grade groups and structures

Organization

An Organization may be a Facility, P&P District (including its CCC and CWC's), Region, Division, or Unit.

Location

A location is the specific physical address of the organization. Work locations in Oracle match the work locations defined in the DOC Time/Leave and Payroll systems.

Job

A generic work description that defines the State of Oklahoma Job Family Descriptor code and title.

Position

The specific PIN number to which the employee is assigned.

Assignment

Details of the employee's place within the agency, including the organization for which the employee works, the job, position, pay band and location. When the assignment information for an employee is changed, the work history is automatically updated.

Salary

Includes base salary and various pay differentials.

SIT

Special Information Types maintainable for each employee (OPM-14 Actions, Qualifications Review, Work History, Disciplinary Actions, Worker's Compensation).



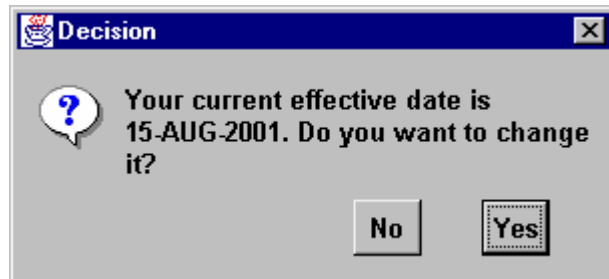
Human Resources Management System

HRMS Characteristics

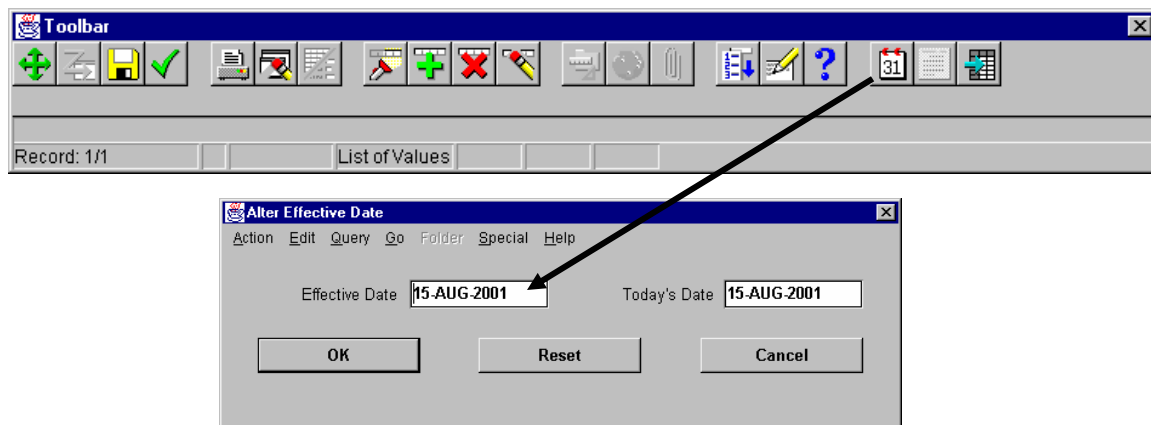
Date Tracking

- Date tracking allows HRMS to maintain a history of changes for information such as compensation, assignments, personal information, etc. Date tracking allows entry of a personnel transaction today that will not become effective until a future date. It is also common to date track to a past date and correct or change historical data.

- HRMS is set in "date-track remind" mode. The reminder appears in a Decision window and asks if the user wants to change the effective date.



- The **Date Tracking** button is located on the toolbar and is represented as a daily calendar (31st) icon. Clicking this button activates the Alter Effective Date window.



Date Format

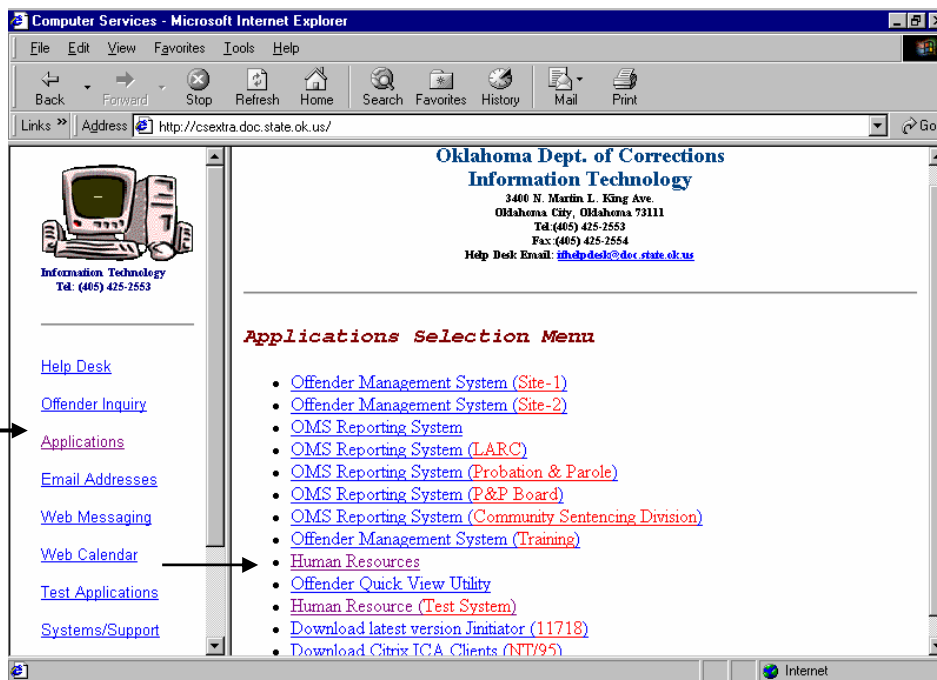
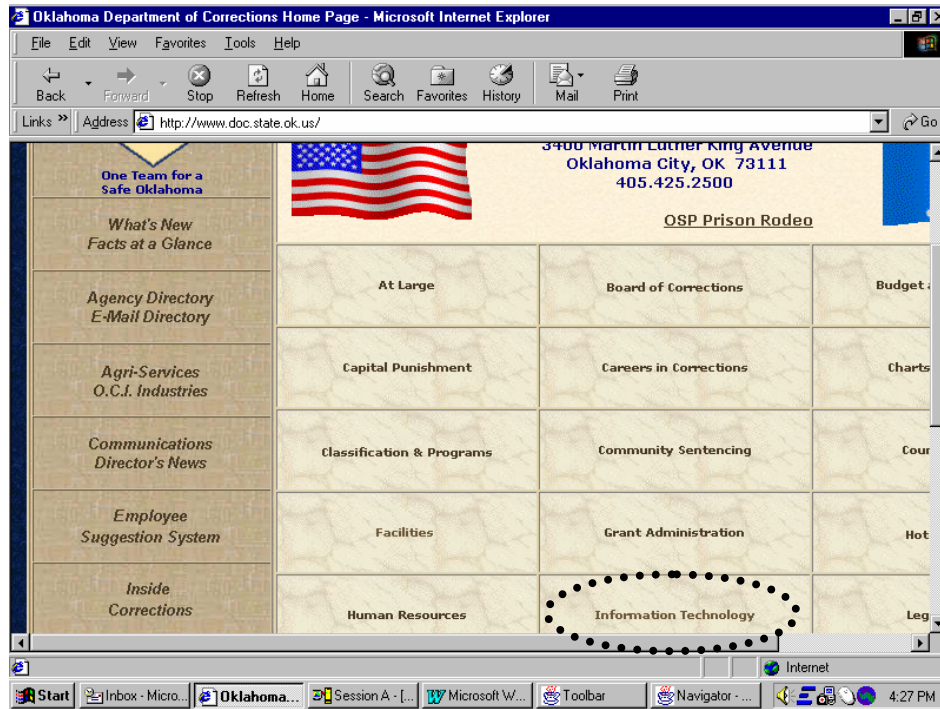
Any date field value is entered in the format of *DD-MON-YYYY* where *DD* represents the two-digit day, *MON* represents the three character abbreviated month and *YYYY* represents the four digit year.



Human Resources Management System

Getting Started

⇒ Open Internet Explorer. From DOC main web page, select:
Information Technology/Applications/Human Resources

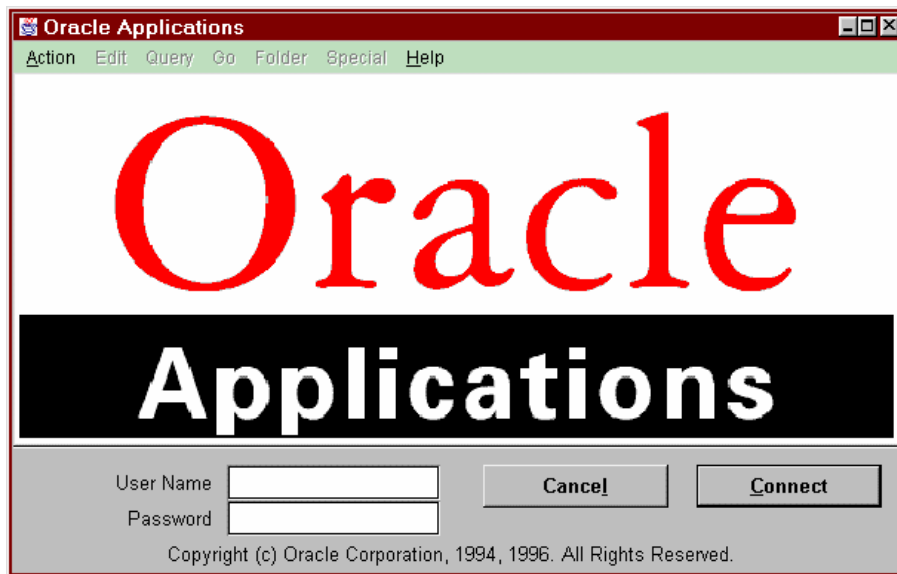


Note: This process may take a few minutes the first time you log on your own computer, as you will need to follow the on-screen instructions for downloading the J-Initiator.



Human Resources Management System

Logging On



- ⇒ Enter your username. A unique username will be assigned to you before you use the system.
- ⇒ Press the **Tab** key.
- ⇒ Enter your password. The password field does not actually display the characters as you type. This is to protect your password confidentiality.
- ⇒ Click on the **Connect** button or press the **enter** key.

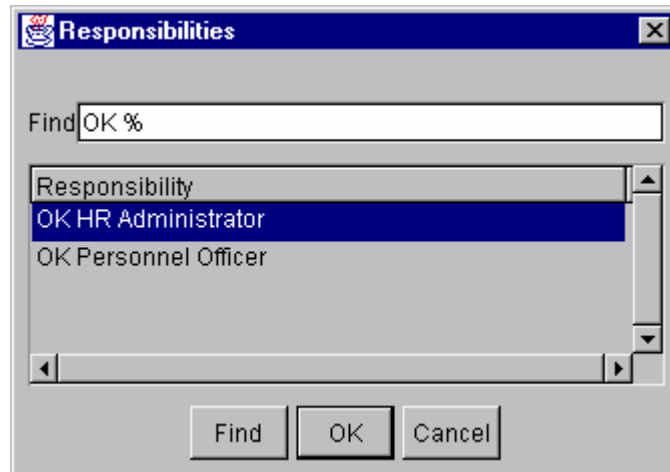


Note: If you click Cancel, you will close the window completely.



Human Resources Management System

Selecting a Responsibility



A **responsibility** is a predefined set of data, menus, and forms that defines your particular level of access to the system. The system administrator has created responsibilities and assigned them to you. You will see only the responsibilities that have been assigned to your username in the menu.

⇒ **Single click** (or select) the name of the desired responsibility for your work.

⇒ Click the **OK** button or press the **enter** key.



Note: Alternatively, you can double click on the responsibility name to choose it.

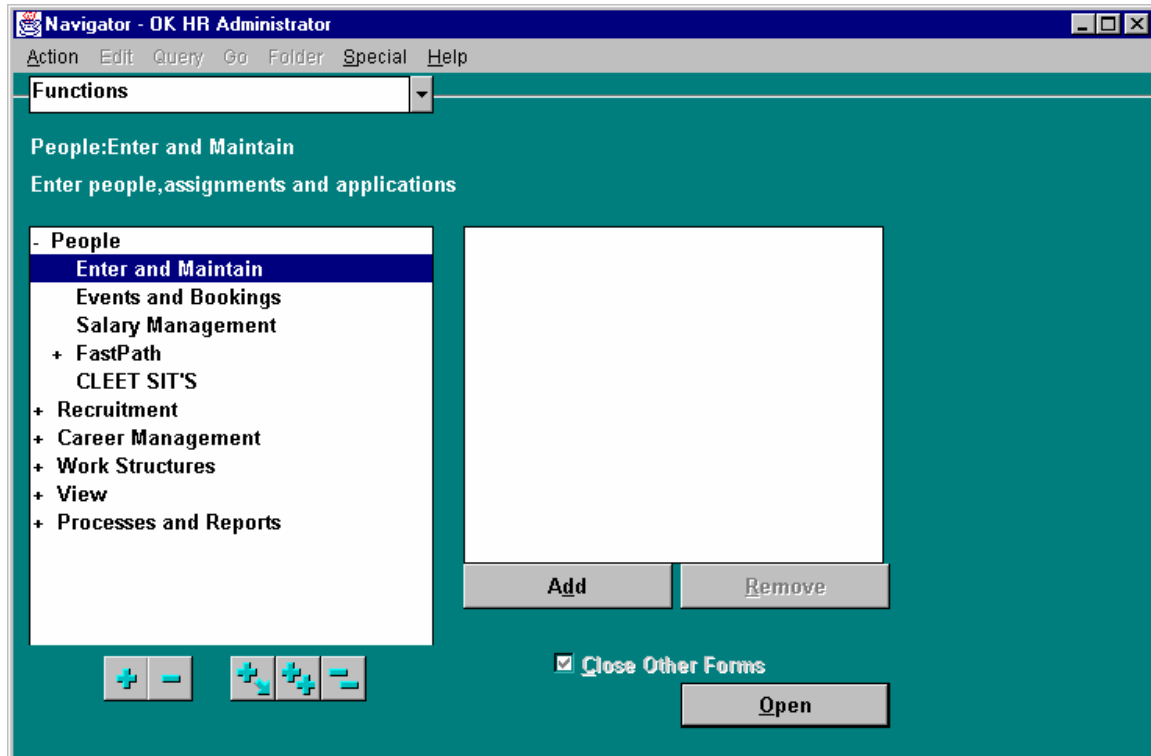
The "OK HR Administrator" responsibility allows the user to view employee information, print reports, run queries, and export information to an Excel spreadsheet.

The "OK Personnel Officer" responsibility allows the user to change/update Emergency Contacts and enter Performance Appraisal information.



Human Resources Management System

Using the Navigator Window

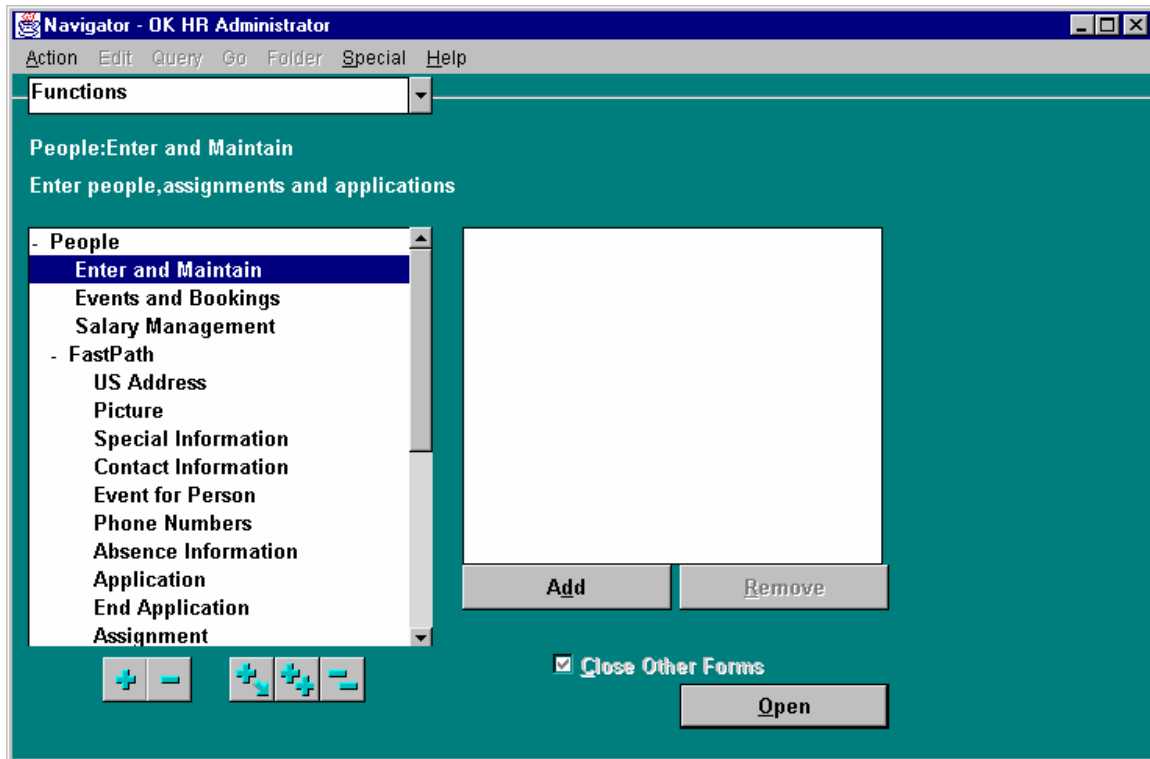


- The Navigator will display the name of the responsibility you selected in the title bar.
- Forms that your responsibility has access to are displayed on the left side of the Navigator window.
- A [+] next to a menu item indicates that it can be expanded and there are additional menu items.
- A [-] next to a menu item indicates that the item is a heading of an expanded list and can be collapsed.
- No [+] or [-] indicates a form that can be opened.






Human Resources Management System

Using the Navigator Menu Buttons



⇒ Select a heading with a [+] in the left margin. Press  to expand the heading.

- The  button will expand the current heading and any heading under it.
- The  button will expand *every* heading.
- The  button will collapse *every* heading.

Opening a Form

⇒ Expand a heading until you find the form that you would like to open.

⇒ Click on the form name. Press the **Open** button or hit the **enter** key.

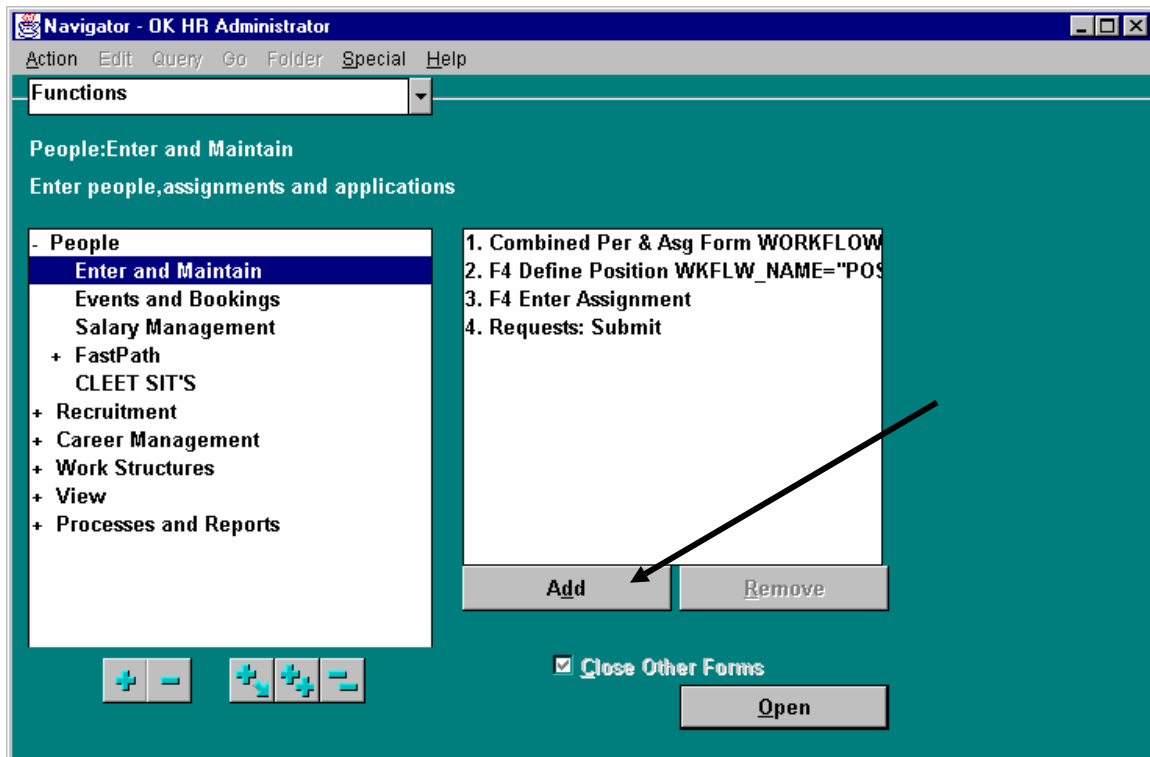


Note: Alternatively, you can double click on the form name to open it.



Human Resources Management System

Top Ten List



The Navigator Window in HRMS includes a feature to access ten forms quickly, rather than going through the process of expanding and collapsing headings to open the form. This is called the "Top Ten List" and is displayed on the right side of the window.

- ⇒ To add a form to the top ten list, select a form name from the left box in the Navigation window.
- ⇒ Press the **Add** button. This will "copy" the form name to the right portion of the window. You can now open it as before by selecting the form name from the "Top Ten List" and pressing **Open** (or by double-clicking on the name).
 - You can remove a form from your top ten list by selecting the form name with a single click and clicking on the **Remove** button. This will remove the form name from the Top Ten List, but you will still be able to navigate to it in the box on the left side of the window.

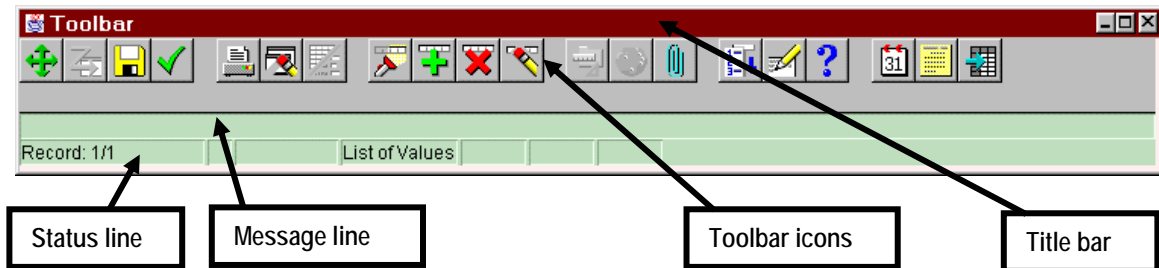


Caution: The form name that is displayed in your top ten list is not necessarily the same as that of the form name in the navigator menu, nor does it necessarily match the actual form title.



Toolbar Basics

A Guide to the Applications Toolbar



Title Bar Currently displays "Toolbar". It will indicate the name of the window.

Toolbar Icons Displays a picture/icon of a commonly used menu item. If the action cannot be performed within the scope of the active window, then the button will be disabled.

Message Line Displays pertinent information while processing forms, including error messages. All message information from any form will be displayed on the message line of the toolbar.

Status Line Displays the status information on a window or field. Contains the following:

- **Record: n/n** – Displays the current record and the total number of records retrieved.
- **Enter-Query** – If this phrase is displayed in the status line, then the current block is in Enter Query mode. While in enter query mode a search criteria may be entered and executed.
- **List of Values** – This indicator informs the user that the current field has a predefined list that may be displayed.

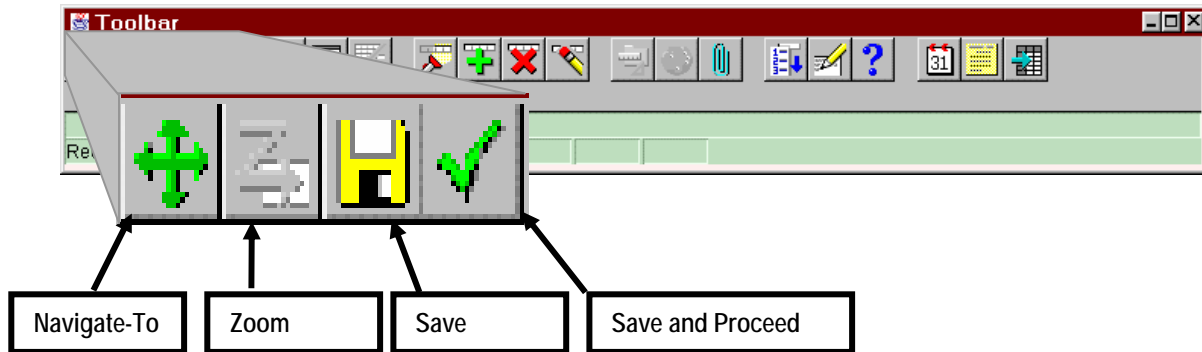


Note: You may need to resize other open windows to keep these lines visible at all times.



Human Resources Management System

The Applications Toolbar



Navigate-To

The Navigate-To icon returns the user to the Navigator Window.

Zoom

The Zoom icon invokes a custom defined "Zoom". This function is set up by the administrator of the system and depends on business rules, etc. This may or may not be active on any particular screen.

Save

The Save icon saves the pending changes of the current form.

Save and Proceed

The Save and Proceed icon saves any pending changes and prepares the window for the entry of a new record.

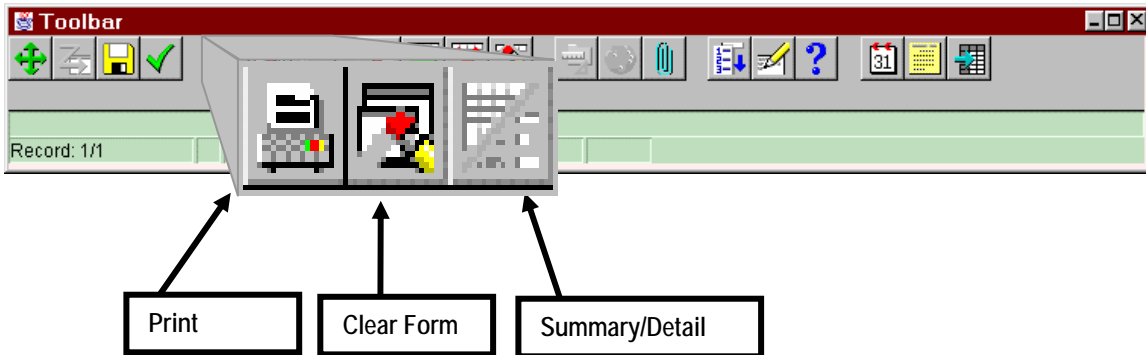


Note: Certain toolbar icons may be disabled or "grayed out" from the toolbar depending on the legal actions of the current window or record.



Human Resources Management System

The Applications Toolbar



Print

The Print icon prints the current screen to the user's assigned default printer.

Clear Form

The Clear Form icon clears all the data in the current window.

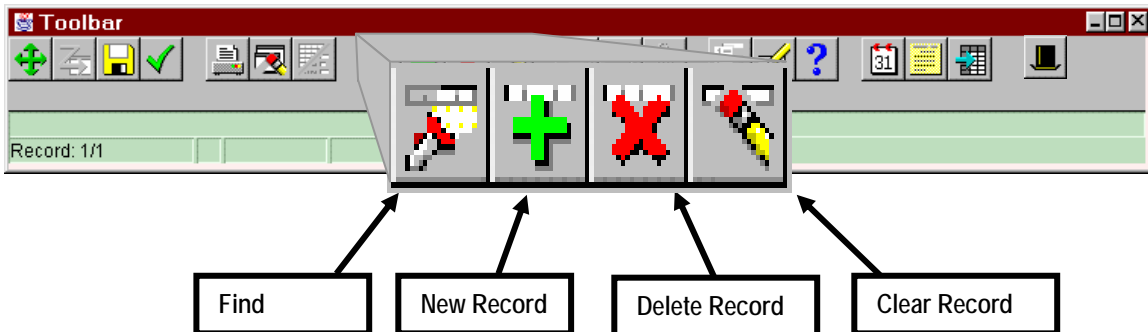
Summary/Detail

The Summary/Detail icon switches the view from summary to detail of the current record or vice versa.



Human Resources Management System

The Applications Toolbar

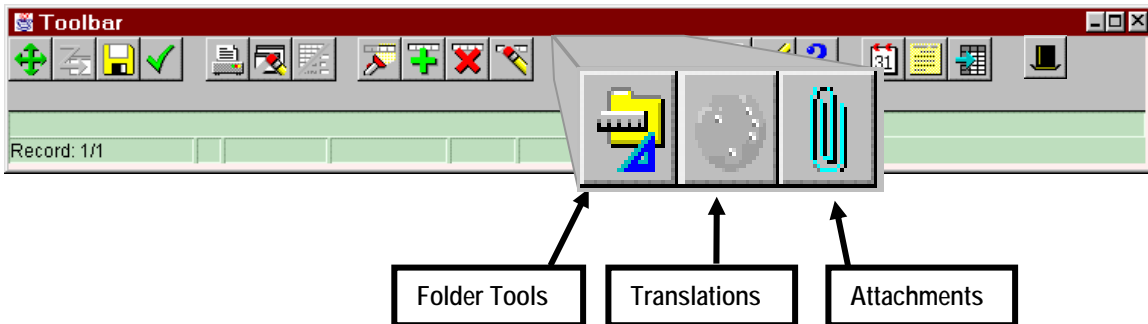


- | | |
|----------------------|---|
| Find | The Find icon displays the Find window to search for data within a certain field. |
| New Record | The New Record icon creates an empty row or form for a new data record. |
| Delete Record | The Delete icon deletes the record from the Oracle database. Not all records allow a delete, therefore the Delete icon may be grayed out. |
| Clear Record | The Clear Record icon clears all data pertaining to the current record in the window. |



Human Resources Management System

The Applications Toolbar



Folder Tools

The Folder Tools icon opens the Folder tools palette.

Translations

The Translations icon opens the Translations window. The translations option allows for multilingual options.

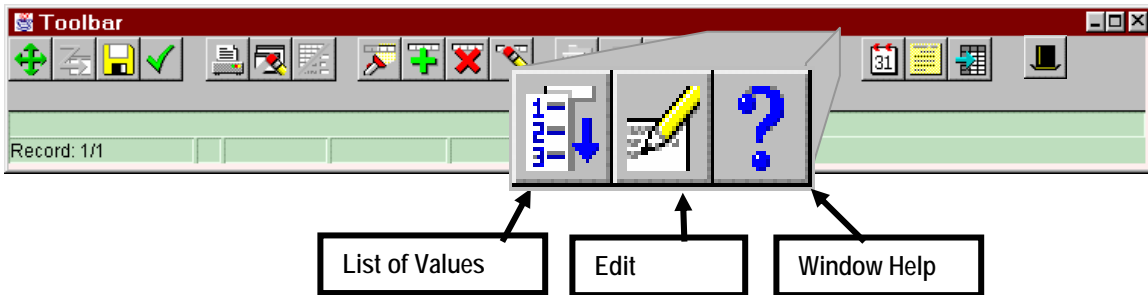
Attachments

The Attachments icon opens the Attachments window. HRMS allow you to attach a document to a form. When the form has an attached document, the icon switches from an empty paper clip to a paper clip holding a piece of paper.



Human Resources Management System

The Applications Toolbar



List of Values

The List of Values icon displays a list of valid entries for the current field. Not all fields have a list of values, therefore the icon may be disabled or "grayed out".

Edit

The Edit icon opens an editor for the current field. This is especially helpful in scrolling fields that may not display the full text on the form.

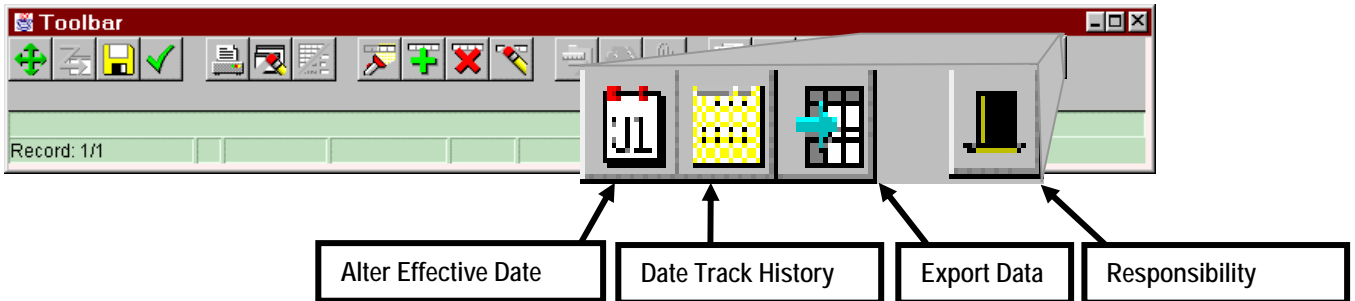
Window Help

The Window Help icon opens the help screen for the current form.



Human Resources Management System

The Applications Toolbar



Alter Effective Date The Alter Effective Date Icon opens a window to allow the effective date to be changed.

Date Track History The Date Track History Icon opens the Date Track History Change Field Summary Window.

Export Data The Export Data Icon exports the current record to a file.

Responsibility The Responsibility Icon opens the Responsibility window that you saw when logging on to the system and allows the user to select a new responsibility or "change hats".



Human Resources Management System

View Employee Information

The People window includes basic employee information such as name, race, gender, social security number, date of birth and age.

The 'People' window displays the following information for Ricardo Lucy:

- Name:** Last: Ricardo, First: Lucy, Title: , Prefix: , Suffix: , Middle: .
- Gender:** Female
- Type:** Employee
- Hire Date:** 15-AUG-2001
- Identification:** Social Security: 111-22-3333, Employee: 111-22-3333, Applicant: .
- Personal Information:** Birth Date: 22-MAR-1953, Age: 48, Nationality: White, Status: Married, Mail To: , Date Last Verified: , Has Disability:
- Effective Dates:** From: 15-AUG-2001, To: .

Buttons at the bottom: Address, Contact, Assignment, Special Info, Others...

The 'Personal Address Information' window displays the following information:

- Address Line 1: 1234 Elm Street
- Address Line 2:
- Address Line 3:
- City: Oklahoma City
- County:
- State: OK Oklahoma
- Zip Code: 73141-1052
- Country: United States
- Telephone: 405-555-1212
- Telephone2: 405-777-2121 pager

Buttons at the bottom: Clear, Cancel, OK

The Personal Address window contains the employee's home or mailing address and phone number(s). This information is initially entered from the Data Summary Sheet, and is updated in the central personnel unit through receipt of a Change of Address form.

The Contact window lists the employee's emergency contact information. (To view additional contacts, use the down ↓ arrow key on the keyboard.) This information is initially entered from the Data Summary Sheet, and is updated by the field personnel representative as new information is received from the employee. (See Pages 39-42 for information on entering and deleting contacts.)

The 'Contact (Ricardo, Lucy)' window displays the following information:

- Name:** Last: Ricardo, First: Ricky, Title: , Prefix: , Suffix: , Middle: .
- Number:** Employee: , Applicant: , Social Security: .
- Gender:** Male, Female, Unknown
- Personal Information:** Birth Date: , Age: .
- Relationship:** Type: Spouse, Primary Contact, Payments Recipient, Dependent, Beneficiary

Buttons at the bottom: Address



Human Resources Management System

View Employee Information

Flexfields

A Descriptive Flexfield is a data field that the organization customizes to meet business needs. The Additional Personal Details flexfield includes the state certificate number (for new hires) as well as various dates.

The screenshot shows the 'People' window with the following data:

Name	
Last	Ricardo
First	Lucy
Title	
Prefix	
Suffix	
Middle	

Gender: Female | Type: Employee | Hire Date: 15.AUG.2001

Identification	
Social Security	111-22-3333
Employee	111-22-3333
Applicant	

Personal Information

Birth Date	22-MAR-1953	Age	48
Nationality	White	Status	Married
Mail To		Email	
Date Last Verified		Has Disability	<input type="checkbox"/>

Effective Dates

From	15-AUG-2001	To	
------	-------------	----	--

Buttons: Address, Contact, Assignment, Special Info, Others...

Click on small square field to open flexfield window.

The screenshot shows the 'Additional Personal Details' window with the following data:

State Certificate Number	33698
Agency EOD Date	15-AUG-2001
Longevity Date	15-AUG-2001
State EOD Date	15-AUG-2001
Continuous Service Date	
Current Temporary Appointment Date	
Probationary LWOP	<input type="checkbox"/>
Probationary Suspension LWOP	<input type="checkbox"/>
Financial Disclosure Required	<input type="checkbox"/>

Buttons: Clear, Cancel, OK



Human Resources Management System

View Employee Information

Organization

- The Organization is the unit, facility, work center, district, region or division for which the employee works.

The screenshot displays the 'Assignment (Ricardo, Lucy)' window with the following data:

Organization	DISTRICT 7 P&P	Group	I40A?Probation and Parole Officer I 15-AU
Job	I40B Probation and Parole Officer II	Position	13101851 I302 SENIOR PROBATION AND P
Grade	IIM	Payroll	Monthly Payroll
Location	97PP DISTRICT 7 P&P	Status	Active Assignment

Assignment Number: 111-22-3333
Employment Category: Probationary
Effective Dates: From 15-AUG-2001 To []

Salary Information: Salary Basis Salaried
Review Salary: Every [] []
Review Performance: Every 12 Month

Location

- The Location matches the work locator code used in other personnel functions (time/leave sheets, payroll processing).



Some Oracle reports allow the user to retrieve data either by Organization or Location



Human Resources Management System

View Employee Information

Jobs

- An HRMS Job is a two-segment field consisting of the Job Family Descriptor (JFD) code and title.

Example: I40B|Probation and Parole Officer II

The screenshot shows a window titled "Assignment (Ricardo, Lucy)" with a menu bar (Action, Edit, Query, Go, Folder, Special, Help). The main area contains several fields:

Organization	DISTRICT 7 P&P	Group	I40A?Probation and Parole Officer I 15-AU
Job	I40B Probation and Parole Officer II	Position	13101851 I302 SENIOR PROBATION AND P
Grade	IIM	Payroll	Monthly Payroll
Location	97PP DISTRICT 7 P&P	Status	Active Assignment

Below these fields are:

- Assignment Number: 111-22-3333
- Employment Category: Probationary
- Effective Dates: From 15-AUG-2001 To []

A "Salary Information" section is expanded, showing:

- Salary Basis: Salaried
- Review Salary: Every [] []
- Review Performance: Every 12 Month

Grades

- Grades in HRMS consist of two segments: grade and type. The grade type is either "monthly" or "hourly". Within HRMS, the grade is assigned to the employee's "Actual Job" in the Group field.

Example: IIM = Pay Band I/Monthly



Human Resources Management System

View Employee Information

Positions

- HRMS positions are comprised of five segments separated by a solid vertical bar.
OPM PIN | Working Title | Merit Status | Authorized FTE | Position Version Number

The screenshot shows a web-based form titled "Assignment (Ricardo, Lucy)". The form contains several fields for employee information:

Organization	DISTRICT 7 P&P	Group	I40A?Probation and Parole Officer II 15-AU
Job	I40B Probation and Parole Officer II	Position	13101851 I302 SENIOR PROBATION AND P
Grade	I M	Payroll	Monthly Payroll
Location	97PP DISTRICT 7 P&P	Status	Active Assignment

Below these fields, there are sections for "Assignment Number" (111-22-3333), "Employment Category" (Probationary), and "Effective Dates" (From 15-AUG-2001, To [blank]).

A "Salary Information" section is also visible, containing:

- Salary Basis: Salaried
- Review Salary: Every [blank]
- Review Performance: Every 12 Month

Employment Category

- This field indicates whether the employee is Probationary, Permanent, Unclassified, or Temporary.

Effective Dates

- These dates indicate the effective period of this assignment. The blank "To" date indicates that this is the employee's current assignment.



Human Resources Management System

View Employee Information

People Group

The People Group key flexfield is shown in concatenated form with each segment separated by the (|) symbol. Click to display the flexfield entry box.

The screenshot displays two windows from the HRM system. The top window, titled "Assignment (Ricardo, Lucy)", shows employee information with the following fields:

Organization	DISTRICT 7 P&P	Group	I40A?Probation and Parole Officer I 15-AU
Job	I40B Probation and Parole Officer II	Position	13101851 I302 SENIOR PROBATION AND P
Grade	IIM	Payroll	Monthly Payroll

The bottom window, titled "People Group Flexfield", is open and shows the following details for the selected job class:

Actual Job Class	I40A Probation and Parole Officer I
Actual Job Date	15-AUG-2001
Merit Status	C Classified
Statutory Cite	
FLSA Status	N Nonexempt
Underfill	Yes
Overfill	No
Premium Pay	No
Time Status	F Full Time
% Time (Part Time Only)	
Retirement Plan	CTX OPERS CO/PO
Salary Above Range	No
Detail	
Training Hours (non-standard)	
Executive Staff	
Upper Management	
Upper Mid Management	
Badge Number	706

Buttons at the bottom of the flexfield window include "Clear", "Cancel", and "OK".

The Actual Job Class (in the People Group flexfield) will differ from the Job segment (on the Assignment window) when the employee is in a lower-level career progression job. The Underfill segment will also be entered as "Yes".



Human Resources Management System

View Employee Information

Salary

- An employee's salary information is viewed by clicking the Salary box at the bottom of the Assignment window.
- The current salary will always appear first; previous salaries may be viewed by hitting the down ↓ arrow key on the keyboard.

Reason	Change Value	Change %	Approved
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>



The Previous Proposal field will contain data if the employee has had more than one salary entered.



Human Resources Management System

View Employee Information

Pay Differentials

- An employee may also be approved to receive various pay differentials, including on-call, shift differential, or mission critical differential. These may be viewed by clicking the "Entries" box at the bottom of the Assignment window.

The screenshot shows the 'Element Entries' window with a table of pay differentials. The 'On Call Differential' row is highlighted in blue. An arrow points from this row to the 'Entry Values' sub-window, which displays the following information:

Entry Value	
Pay Basis	Hourly
Amount	1.00
Percent of Salary	

To view the amount of the differential, select the appropriate element name (indicated by blue highlight to the left), and click the Entry Values box.



Human Resources Management System

View Employee Information

Special Information Types

- Oracle HRMS maintains special information for employees, including OPM-14's, qualifications review, state work history, training, discipline and worker's compensation. (Note: Each Responsibility may have access to view different Special Information Types.)

Example of Work History S.I.T.

Name	Information Exists
OSHA-reportable Incident	<input type="checkbox"/>
Previous State Employment	<input type="checkbox"/>
Work History (Conversion)	<input checked="" type="checkbox"/>
Workers Compensation	<input type="checkbox"/>

Start Date	End Date	Detail
01-MAR-1999		01-MAR-1999 A14 Unclassified (Except
28-FEB-1999		28-FEB-1999 L01 Leave Without Pay C
01-JAN-1999		01-JAN-1999 C21 Cost of Living Increa
17-AUG-1998		17-AUG-1998 C01 Promotion C316 SEN
01-JUL-1996		01-JUL-1996 C21 Cost of Living Increa
01-OCT-1994		01-OCT-1994 C21 Cost of Living Increa
11-DEC-1992		11-DEC-1992 C99 Assignment of Initial
01-DEC-1992		01-DEC-1992 C21 Cost of Living Increa
15-AUG-1991		15-AUG-1991 C51 Permanent Status C

Effective Date	01-JAN-1999
Personnel Action Code	C21
Personnel Action Description	Cost of Living Increase
Job Class Code	C316
Job Class Title	SENIOR PERSONNEL OFFICER
Grade	57
Salary	

Click in the "Detail" segment to view information about each personnel transaction.

Note: The "Work History" SIT contains only the transactions which occurred prior to Oracle data conversion (June, 1999). Any transactions occurring after conversion are shown in the "14 Actions" SIT.



Human Resources Management System

View/Query Positions

View Positions in HRMS

Navigator
Work Structures
Position
Descr_Query

Query/Enter
(or 'F11')

Click in Name segment to open Position Flexfield.

Type in PIN number
Select [OK]

Query/Run
(or 'CTRL F11') →→



Human Resources Management System

View Positions in HRMS

HRMS Positions are comprised of five segments as shown below.

The image shows two screenshots from the HRMS application. The top window, titled "Position", displays fields for "Dates" (From: 01-NOV-1999, To:), "Name" (13103443|I111 CORRECTIONAL SECURITY CORPORAL|C|1.00|2), "Organization" (MABEL BASSETT CC), "Job" (I10C|Correctional Security O), "Location" (30MB MABEL BASSETT), and "Status" (Valid). Below these are "Standard Conditions" (Working Hours, Frequency, Normal Time Start/End) and buttons for "Reporting To", "Evaluation", "Requirements", "Valid Grades", "Occupancy", and "Work Choices". The bottom window, titled "Position Flexfield", shows fields for "PIN" (13103443), "Working Title" (I111 CORRECTIONAL SECURITY CORPORAL), "Merit Status" (C Classified), "FTE" (1.00), and "Version Number" (2). A black arrow points from the PIN field in the "Position Flexfield" window to the "Name" field in the "Position" window.

- Positions are identified by the OPM Position Identification Number (PIN).
- For Class/Comp conversion, the old job class code was inserted into the Working Title to allow querying by old class code or new JFD code.
- The Merit Status indicates whether the position is Classified or Unclassified.
- The FTE may indicate a full-time position (1.00) or part-time (0.50, 0.25, etc.).
- A Version Number is assigned to each position to track changes over time, such as Organization changes, reallocations, etc.



Human Resources Management System

View Positions in HRMS

The Descriptive Flex Field contains additional information about the position.

Position

Action Edit Query Go Folder Special Help

Dates

From To

Name

Organization Job

Location Status

Standard Conditions

Working Hours

Frequency

Normal Time

Start End

Additional Position Details

Allocation Type

OPM Family Decision Date

Agency Level Decision Date

Previous Job Class

Reason for Action

Allocation Reviewer

Allocation Comments

Position Comments

Budgeted FTE



Human Resources Management System

View Positions in HRMS

Once the desired position has been queried, you can view the incumbent(s) of that position by hitting the "Occupancy" button.

Position

Action Edit Query Go Folder Special Help

Dates From 01-NOV-1999 To

Name 13103443|1111 CORRECTIONAL SECURITY CORPORAL|C|1.00|2

Organization MABEL BASSETT CC Job 110C|Correctional Security O

Location 30MB MABEL BASSETT Status Valid [Ne]

Standard Conditions

Working Hours Start End

Frequency

Reporting To Evaluation Requirements Valid Grades

Occupancy Work Choices

Position Occupancy (13103443|1111 CORRECTIONAL SECURITY CORPORAL|C|1.00|2)

Action Edit Query Go Folder Special Help

Full Name	Applicant Number	Employee Number
Flintstone, Fred		444-44-4444
Rubble, Barney		555-55-5555

Person

At first glance, this position appears to be double-filled. However, by scrolling to the right side of the form, you can see that both employees have vacated the position.

Position Occupancy (13103443|1111 CORRECTIONAL SECURITY CORPORAL|C|1.00|2)

Action Edit Query Go Folder Special Help

Employee Number	Start Date	End Date
444-44-4444	21-JUN-2000	09-JUL-2000
555-55-5555	01-NOV-1999	31-JAN-2000

Person



Human Resources Management System

Defining Search Criteria

Several positions may be queried (or positions in which the PIN number is unknown) by defining search criteria.

Query/Enter (or F11)
(Enter specific search criteria)

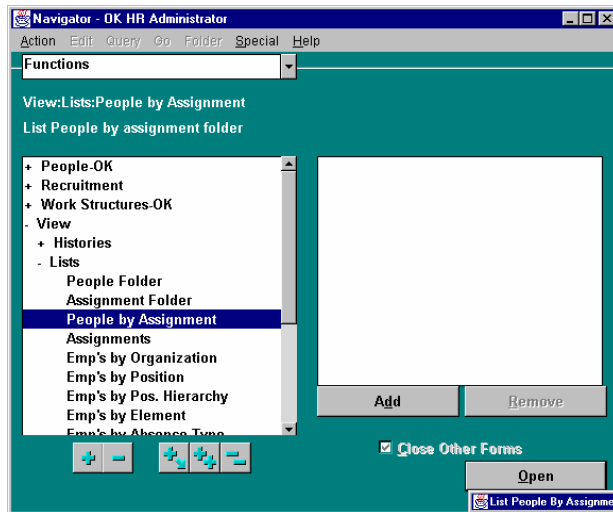
Wildcard characters are used before and/or after known characters

Query/Run (or CTRL + F11)

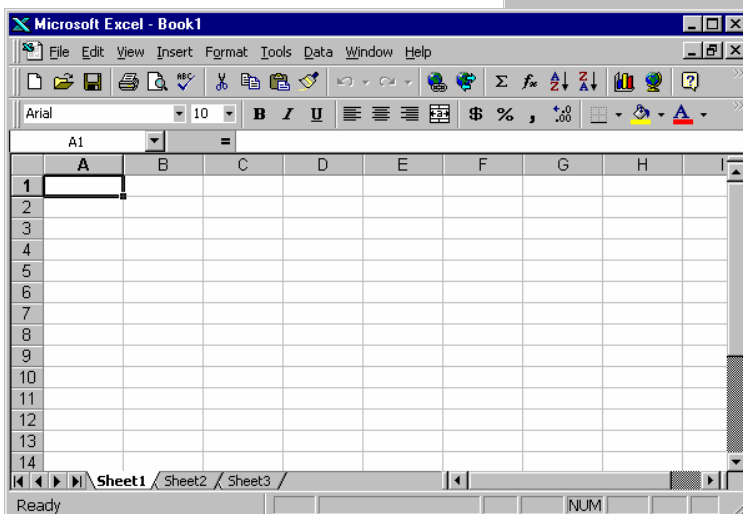
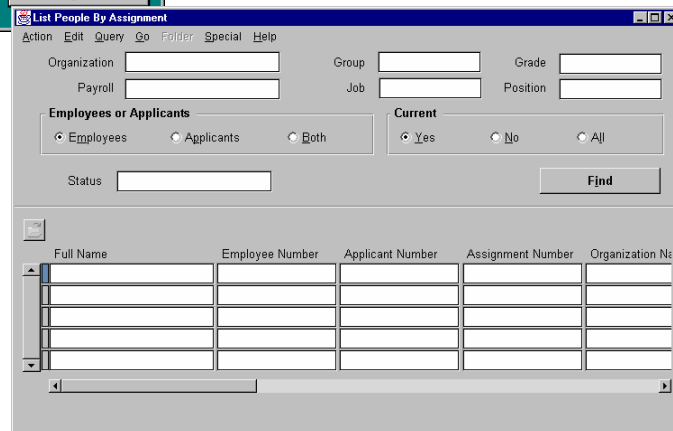
All positions which meet the search criteria will be retrieved. Use the down arrow ↓ on the keyboard to scroll through the positions.



Querying with Folders



A very helpful feature in HRMS is the ability to query specific records using Folders. The information retrieved can be exported to an Excel spreadsheet and then sorted by specific columns, saved, printed or e-mailed as an attachment.

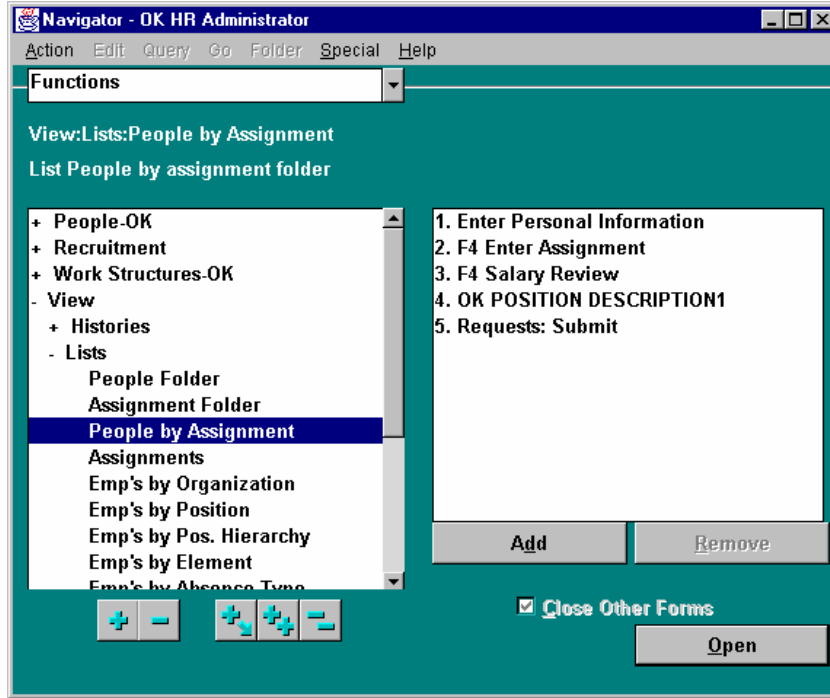


Although there are several folders provided in HRMS, the following pages outline two of those most often used to respond to ac hoc queries.



Human Resources Management System

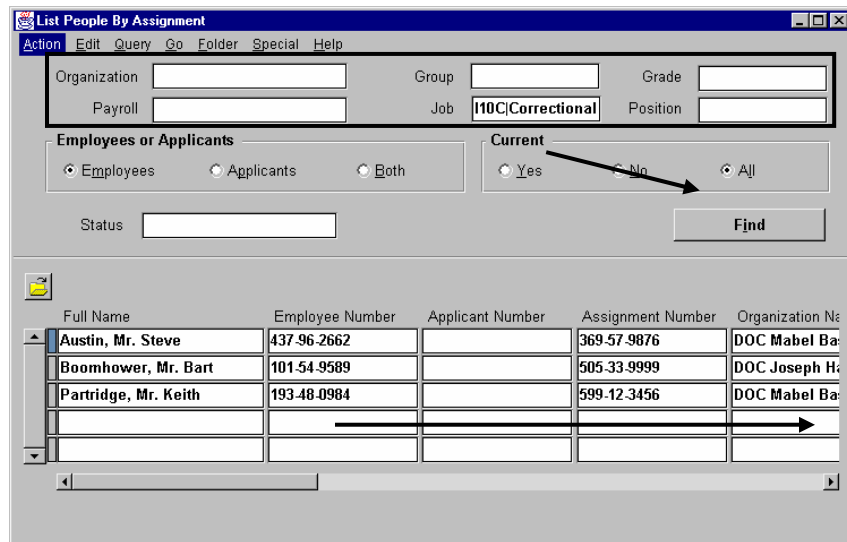
Querying with Folders



The People by Assignment folder is very user-friendly and is a fast way to identify specific employees by job, grade, merit status, and more.

Enter requested information in any of the segments in the top region of the form, hit the Find button, and the information is retrieved at the bottom.

Additional columns may be viewed by scrolling to the right of the form.

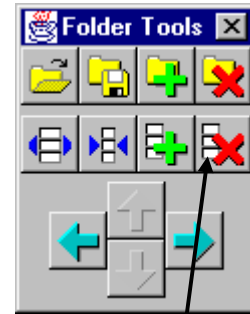




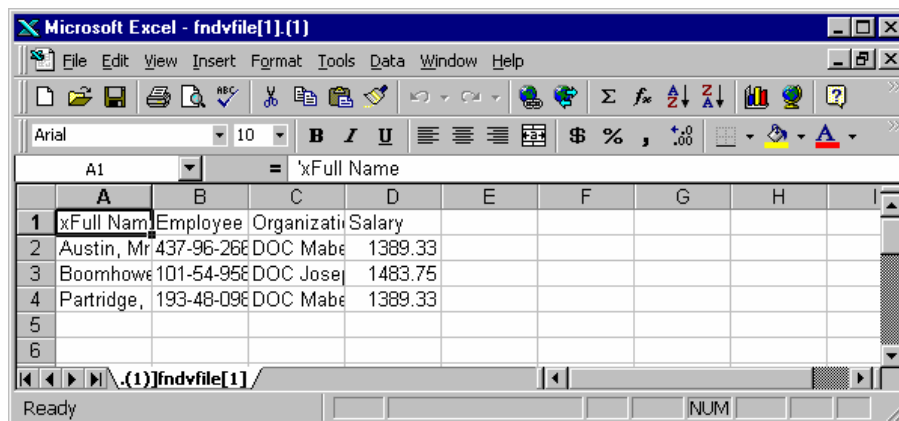
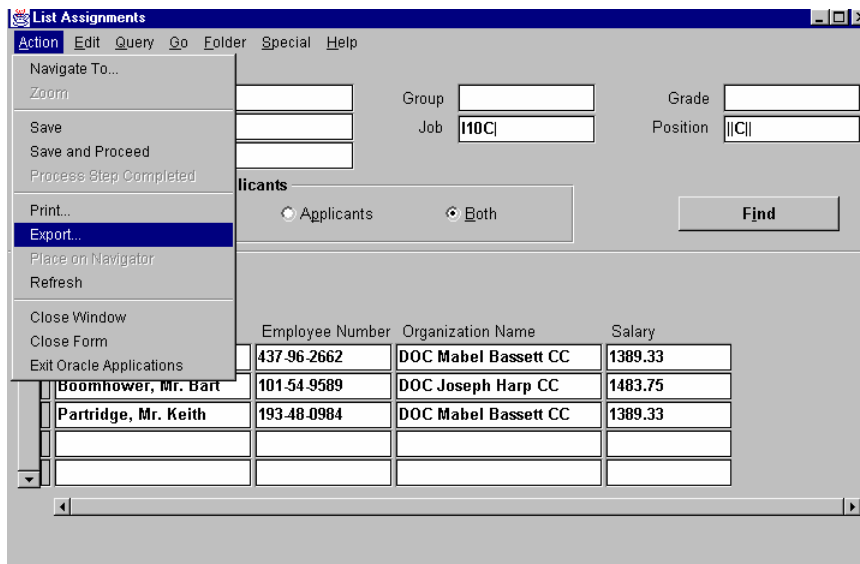
Human Resources Management System

Exporting Data to a Spreadsheet

Once the desired information has been queried through a folder, it can be exported to a spreadsheet for additional customization. Prior to exporting, it is helpful to delete any unneeded columns using folder tools. (In the example from the previous page, the columns for "Applicant Number" and "Assignment Number" have been deleted.)



To delete unneeded columns, place cursor in desired column and click "delete column" icon on toolbar. (The column is removed only for this query.)

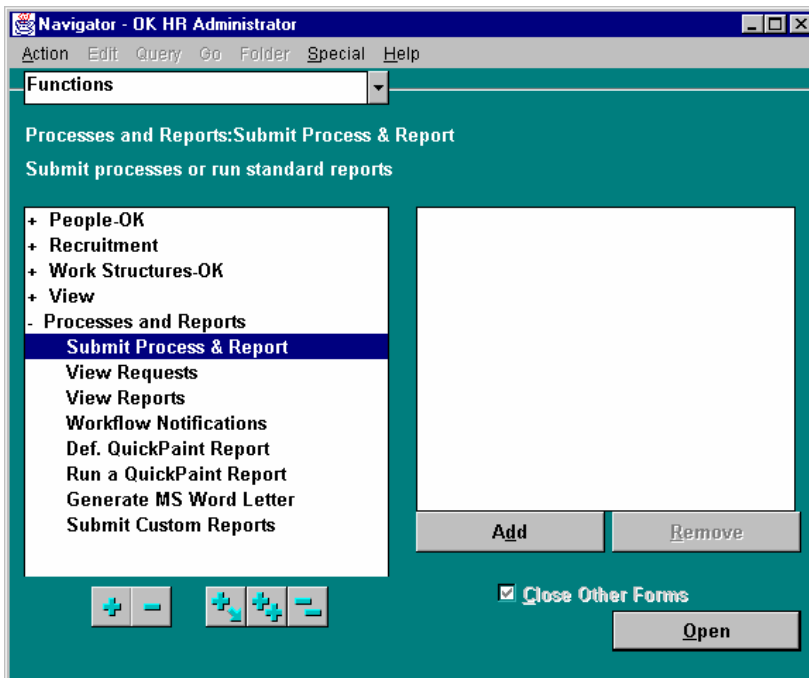


The raw data is exported to the spreadsheet. Adjustments will need to be made to "tidy up" the appearance, including widening columns, formatting salary columns, adding headers, etc. Information can now be sorted by any column, depending upon business needs.



Standard Reports

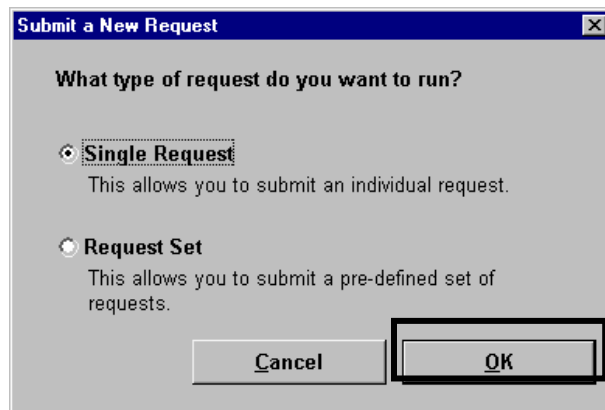
Within the Oracle Human Resources Management System are numerous standard reports which have been created by and for the Oklahoma Department of Corrections. Standard reports are a fast, easy way to access requested data in a predefined format, and may be viewed on-screen and/or printed. Many reports have parameters in which the user defines the extent of the data to be reported. (Example: a Position Vacancy Report may be run for the entire facility or for only one job class.)



From the Navigator, select:

- Processes and Reports
- Submit Process & Report

Select Single Request [OK]





Human Resources Management System

Standard Reports

All O.D.O.C. reports begin with the letters OK. In the "Request Name" segment, type in OK and press the **Tab** key.

Submit Request

Action Edit Query Go Folder Special Help

Run this Request...

Request Name

Parameters

Language

At these Times...

Upon Completion...

Save all Output Files

Notify

Print To

Scroll down through the list until the desired report is highlighted. Select the report either by:

1. Double-clicking on the highlighted selection; or
2. Highlighting the selection and clicking the [OK] button; or
3. Highlighting the selection and hitting Enter on the keyboard

Reports

Find

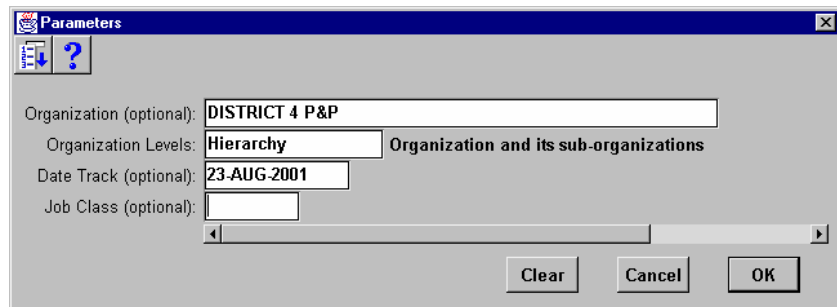
Name	Application
OK Position Allocation Report	Oracle Human Resources
OK Position Budgeting Report	Oracle Human Resources
OK Position Changes Report	Oracle Human Resources
OK Position Report	Oracle Human Resources
OK Position Vacancy Report	Oracle Human Resources
OK Probationary Assignment Ending Report	Oracle Human Resources
OK Salaries (Limit by Job or Organization)	Oracle Human Resources
OK Salaries by Actual Job or Job Level	Oracle Human Resources
OK Salary Data Pull	Oracle Human Resources
OK Salary and Position Budgeting Discrepancy Report	Oracle Human Resources
OK Service Awards by Organization	Oracle Human Resources
OK Service Awards by Tenure	Oracle Human Resources
OK Temporary Assignment Ending	Oracle Human Resources

Standard Reports



Human Resources Management System

Enter the parameters to produce the type of report desired. In this example, all of the District 4 hierarchy (including Lawton CCC and the CWC's) would be retrieved.

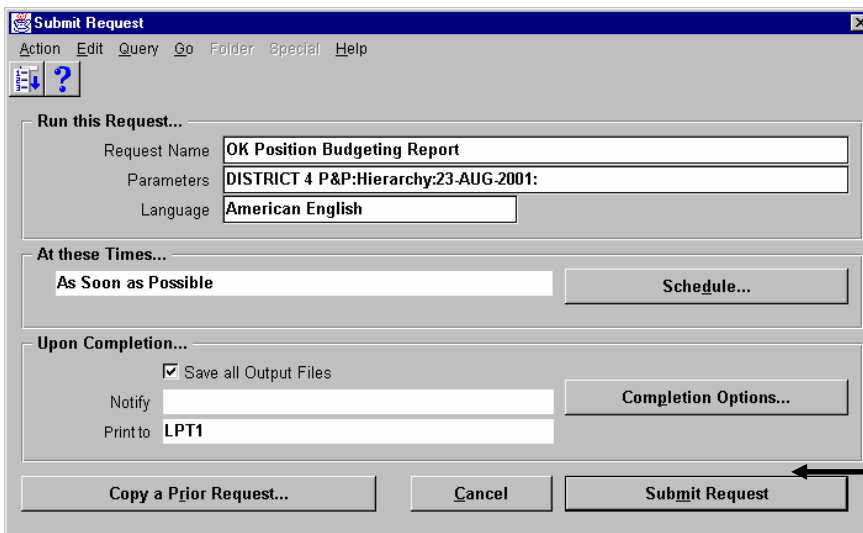


Parameters dialog box with the following fields:

- Organization (optional): DISTRICT 4 P&P
- Organization Levels: Hierarchy Organization and its sub-organizations
- Date Track (optional): 23-AUG-2001
- Job Class (optional):

Buttons: Clear, Cancel, OK

Select [OK].



Submit Request dialog box with the following sections:

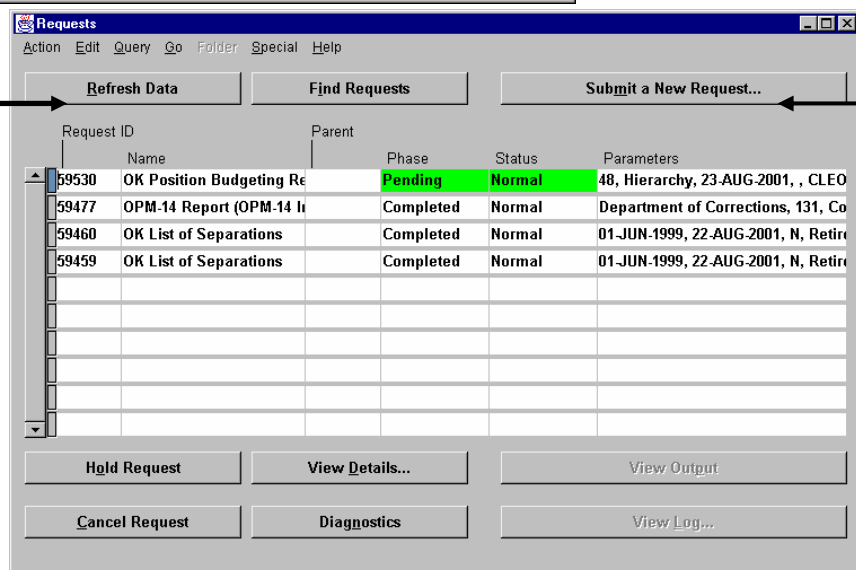
- Run this Request...**
 - Request Name: OK Position Budgeting Report
 - Parameters: DISTRICT 4 P&P:Hierarchy:23-AUG-2001:
 - Language: American English
- At these Times...**
 - As Soon as Possible
 - Schedule...
- Upon Completion...**
 - Save all Output Files
 - Notify: [empty]
 - Print to: LPT1
 - Completion Options...

Buttons: Copy a Prior Request..., Cancel, Submit Request

To process report, select Submit Request.

To view the status of the report, click on Refresh Data. The Phase (status) will change from "Pending" to "Running" to "Completed".

Hint: You may begin processing a new report by selecting Submit a New Request; both reports will run concurrently.



Requests dialog box showing a table of requests:

Request ID	Name	Parent	Phase	Status	Parameters
59530	OK Position Budgeting Re		Pending	Normal	48, Hierarchy, 23-AUG-2001, , CLEO
59477	OPM-14 Report (OPM-14 li		Completed	Normal	Department of Corrections, 131, Co
59460	OK List of Separations		Completed	Normal	01-JUN-1999, 22-AUG-2001, N, Retir
59459	OK List of Separations		Completed	Normal	01-JUN-1999, 22-AUG-2001, N, Retir

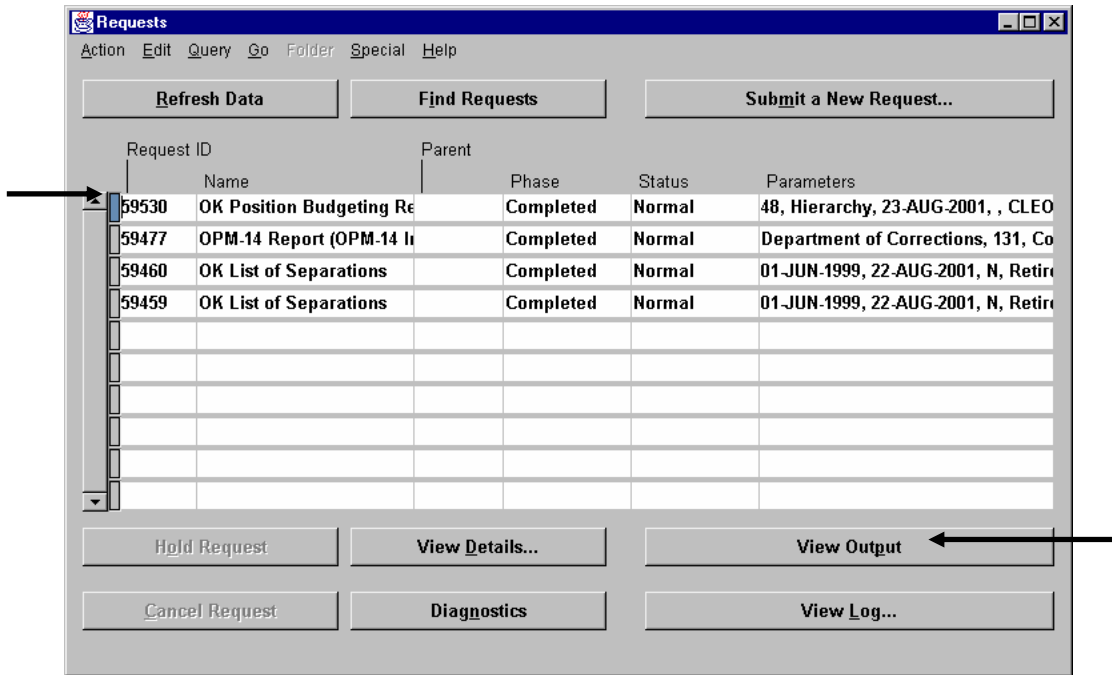
Buttons: Refresh Data, Find Requests, Submit a New Request..., Hold Request, View Details..., View Output, Cancel Request, Diagnostics, View Log...



Human Resources Management System

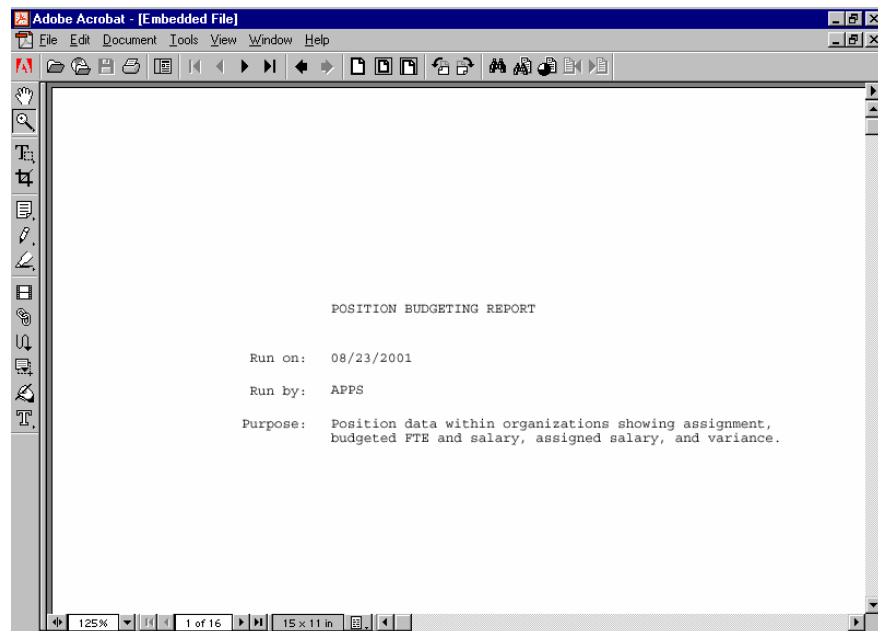
Standard Reports

With the desired report selected (the tab to the left of the Request ID will be blue), click View Output.



The report will be accessed through Adobe Acrobat and may be viewed on-screen and/ or printed.

Note: If problems occur in viewing or printing a report, contact your Computer Services Coordinator.





Human Resources Management System

Entering and Deleting Contacts

Another significant feature of Oracle HRMS is the ability to store employee emergency contact information which can be retrieved by authorized staff from any computer with internet access. Contacts should be updated as changes occur (notification by the employee) so that this vital information is always up-to-date.

Using the "OK Personnel Officer" Responsibility, Query the employee to be updated.

Query/Enter (or F11)
Last, First%
Query/Run(or CTRL
+ F11)

When the desired record is retrieved, click the Contact button to open the Contact window.

The screenshot shows a window titled "Assignments Folder" with a menu bar (Action, Edit, Query, Go, Folder, Special, Help). Below the menu is a section for "Assignments" with radio buttons for "Current", "Past", and "Both". A table with columns "Full Name", "Type", "Assignment Number", "Title", "Surname", and "Fo" contains one row: "Leonard, Cindy%". At the bottom, there are two buttons: "Contact" and "Reviews". An arrow points to the "Contact" button.

The primary contact will appear first; additional contacts may be viewed by hitting the down ↓ arrow on the keyboard.

The screenshot shows a window titled "Contact (C. Leonard)" with a menu bar (Action, Edit, Query, Go, Folder, Special, Help). It contains several sections: "Name" with fields for Last (Leonard), First (Daniel), Title, Prefix, Suffix, and Middle; "Number" with fields for Employee, Applicant, and Social Security; "Gender" with radio buttons for Male, Female, and Unknown; "Personal Information" with fields for Birth Date and Age; and "Relationship" with a Type field set to "Spouse" and checkboxes for Primary Contact, Payments Recipient, Dependent, and Beneficiary. At the bottom, there is an "Address" button. An arrow points to the "Address" button.

Click the Address button to view or change this Contact's address and phone number.



Human Resources Management System

Contacts

Click in the Address segment to open the Personal Address Information. Enter information as shown below.

The 'Address' window shows a menu bar with 'Action', 'Edit', 'Query', 'Go', 'Folder', 'Special', and 'Help'. The 'Style' field contains 'United States'. The 'Address' field is empty. The 'Details' section includes a 'Type' field, a 'Primary' checkbox, a 'Date From' field with '22-FEB-2000', and a 'Date To' field with empty brackets.

The 'Personal Address Information' dialog box contains the following fields: Address Line 1 (PO Box 1234), Address Line 2, Address Line 3, City (Oklahoma City), County, State (OK Oklahoma), Zip Code (73141), Country (United States), Telephone (405-555-1234), and Telephone2 (405-777-9876 pager). At the bottom are 'Clear', 'Cancel', and 'OK' buttons.

When entering addresses, do not use periods (PO Box 1234, 1700 NE 27th Street)


Use complete city names, not abbreviations such as OKC.

Use the dash (-) to separate the area code from the phone number.

After information is entered, click [OK].

The 'Address' window now shows the 'Address' field populated with 'PO Box 1234...Oklahoma City..OK.73141.United States.405-599-1234.405-777-9876 pa'. The 'Details' section shows 'Type' as 'Mailing', 'Primary' checked, and 'Date From' as '22-FEB-2000'.

For "Type" of address, enter either Mailing or Home.

SAVE  and close window (☒) to return to Contact window.

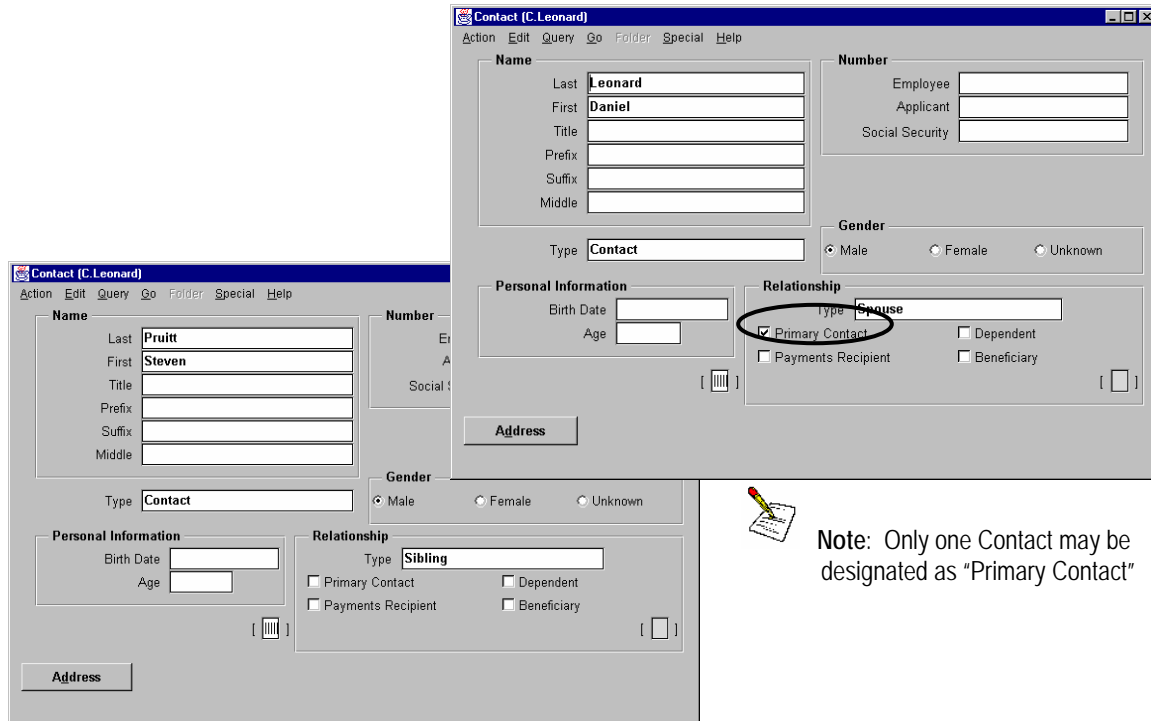


Human Resources Management System

Contacts



To enter additional contacts, click the New Record (+) icon and repeat all steps. Enter up to 3 contacts per employee. View contacts by using the up and down arrows on the keyboard.



Deleting Contacts

When an employee notifies you of a change of contact (possibly due to marriage, divorce, or death), it is not only necessary to enter the new contact but to delete any outdated contacts as well.

In order to delete the Contact, it is first necessary to delete the Contact's address.



Human Resources Management System

Deleting Contacts

Access the Employee through the Query; then select Contact. Use the down arrow to find the Contact to be deleted. Go to the Address.



Remove the Address using the Delete (X) icon on the tool bar. SAVE and close the Address window.

Remove the Contact using the Delete icon on the tool bar.



SAVE.

Repeat to delete other Contacts, if necessary.



Note: As employees separate from the agency, their Contacts are removed by the central personnel unit when the transaction is entered.



Human Resources Management System

Entering Performance Reviews

Oracle HRMS stores information concerning employee performance appraisals, including the date of the appraisal, the rating, supervisor and date of the next due appraisal. A standard report will allow the user to print lists of evaluations due and overdue.

Using the "OK Personnel Officer" Responsibility, Query the employee to be updated.

Query/Enter (or F11)
Last, First%
Query/Run (or CTRL + F11)

Full Name	Type	Assignment Number	Title	Surname	Fo
Crane, Mr. Frazier	Employee	789-65-4321	Mr.	Crane	Fr

Click Reviews to open a blank page.

Enter the following information:

- Type of review (Annual, Probationary, or Other)
- Location (type the 4 digit work location and hit 'tab')
- **Ending date** of appraisal period (*enter same date in both "Start" and "End" segments*)

➤➤ SAVE ⏪⏩

- Enter Reviewer's name (type in last name and hit 'tab')

➤➤ SAVE ⏪⏩

Open the Performance Review window.

Type: Annual Location: 30MB Mabel Bassett

Date: Start: 25-FEB-2000 End: 25-FEB-2000 Time: Start: End: []


Name	Employee Number
Malone, Sam	440-58-5505

Performance Review



Human Resources Management System

Entering Performance Reviews

With the cursor in the "Type" segment, click on the  List of Values, then click the Find button. Any Reviews which have previously been entered will appear in the box shown below.

Event Type	Event Location
Annual	30MB Mabel Bassett


(It will be necessary to scroll to the right of this window to see the date of the review.)

Select the Review to be entered by either double-clicking or highlighting and clicking [OK].

The Type, Location, and Date will auto-populate as shown.

Using the 'tab' key, move cursor to the "Rating" segment. (This action will cause the "Next Date" segment to auto-populate.)

Using the List of Values, enter the appropriate Rating (or type the first few characters, such as 'ex', 'me' and hit the 'tab' key).

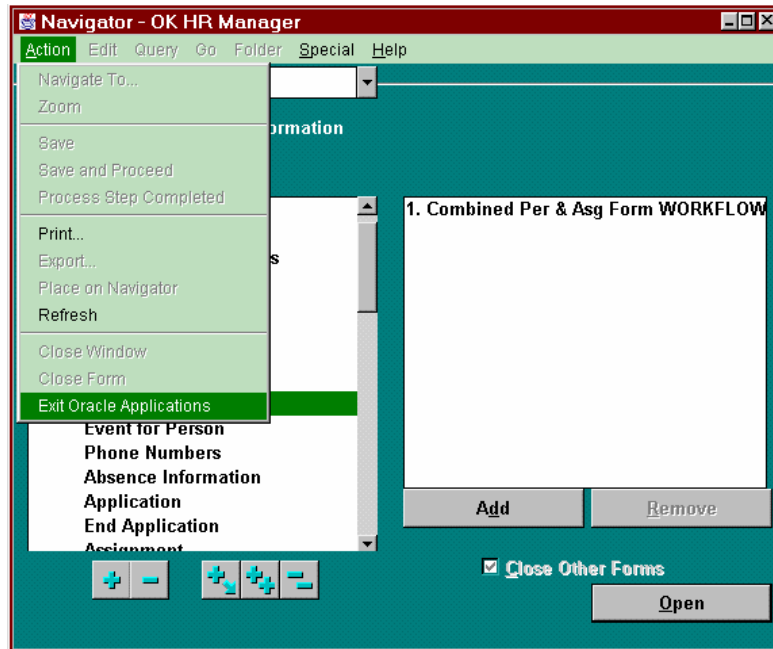
When the Rating has been entered, Save and Exit  the Performance window.





Exit/Quit Oracle Applications

Logging Off



⇒ From the menu bar at the top of the Navigator window, choose
Action
 >Exit Oracle Applications



Note: It is important to log off the system in this manner to ensure that your username is cleared from the system access.

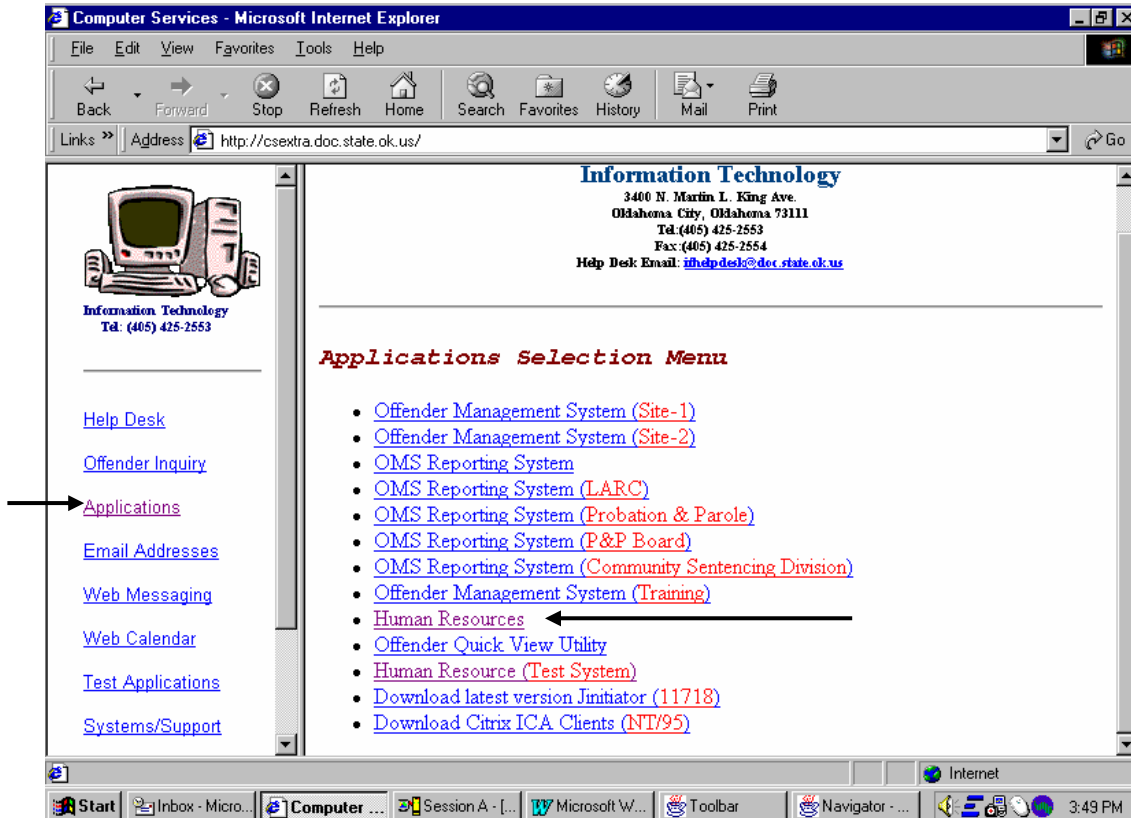
Although routine “back-ups” occur during non-business hours, there are times when the Oracle system must be shut down for maintenance. When such a need arises, our Data Base Administrator will send out an e-mail to all employees with Oracle user profiles advising them to save their current work and exit Oracle within a specified time frame. A follow-up message will be sent when it is safe to log back on.



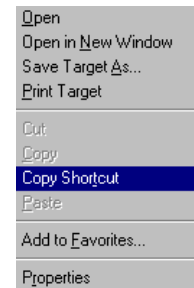
Human Resources Management System

Create ORACLE Shortcut

Creating a shortcut on the computer desktop will speed up the process of opening the Oracle HRMS application.



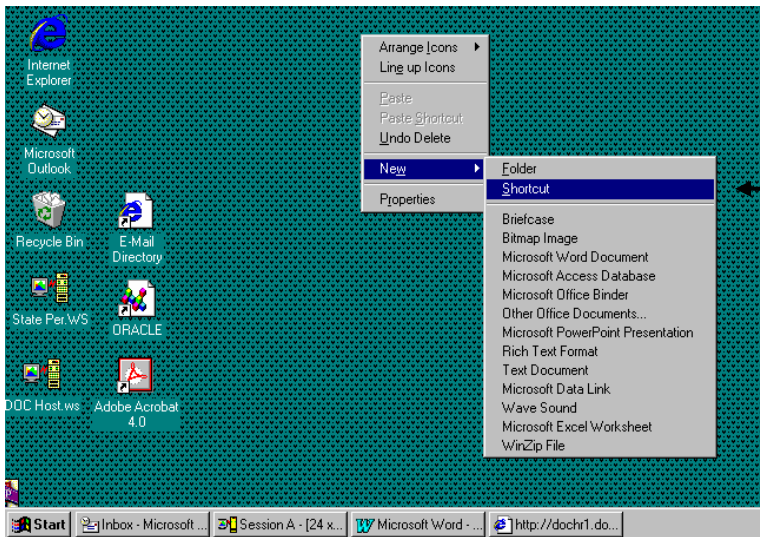
1. Open Internet Explorer
2. From the main DOC web page, select Information Technology, then Applications.
3. From the *Applications Selection Menu*, **right** click on Human Resources.
4. From the window which opens, **left** click on Copy Shortcut.
5. Exit Internet Explorer by clicking the in the upper right corner.



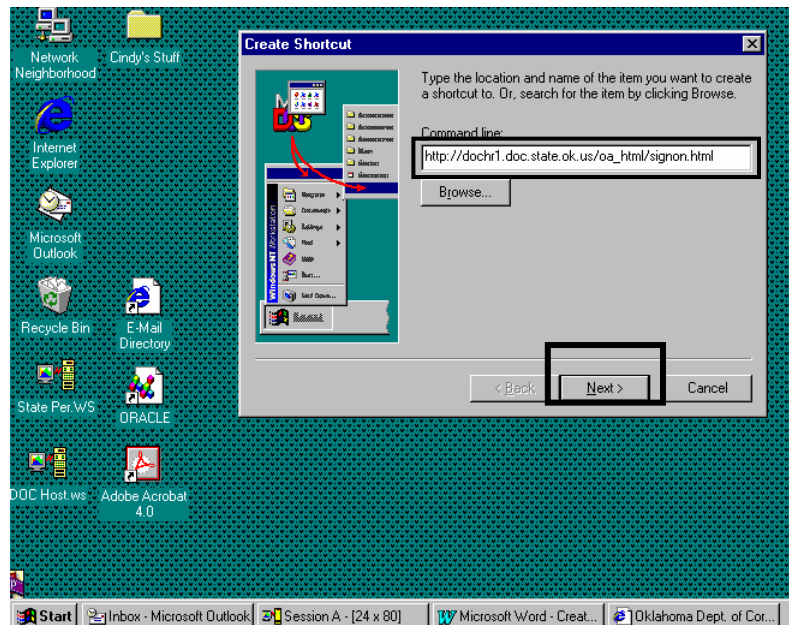


Human Resources Management System

Creating Shortcut



6. From the desktop, **right** click anywhere on the background where there is not currently an icon.
7. Select New ➤ Shortcut, as shown above (left click).

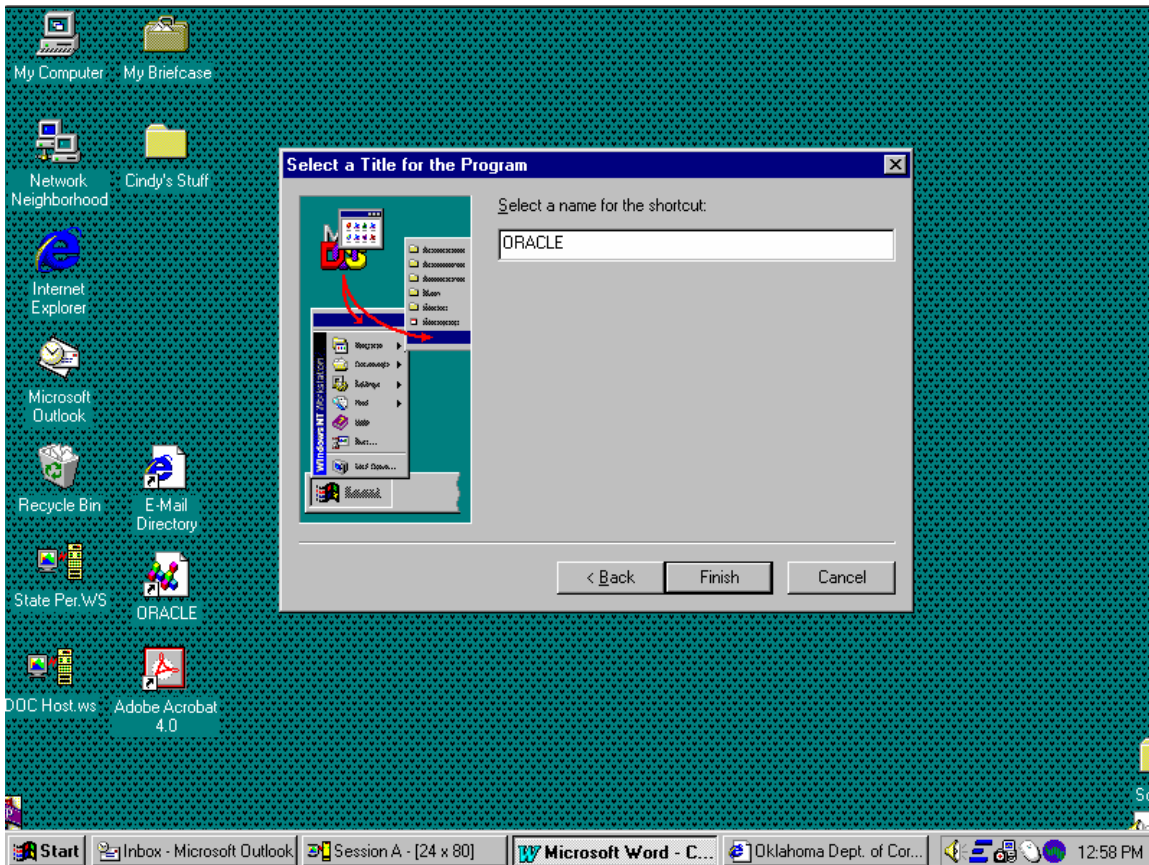


8. In the Command line window, **right** click and select Paste.
9. Click Next >



Human Resources Management System

Creating Shortcut



10. Rename "New Internet Shortcut" to ORACLE, as shown above.
11. Select Finish, and a new icon will appear on your desktop.
12. If you want to change the icon associated with this new shortcut, you can **right** click on it, select Properties/Web Document/Change Icon, then pick the new icon you want.
13. You can now access Oracle HRMS by double-clicking on the icon.

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