



# **SAM II HR**

## **Introduction and Navigation**



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# **TOPIC 1 - INTRODUCTION**

SAM II HR is a component of the Statewide Advantage for Missouri (SAM II) system that is specifically designed to support personnel and payroll management activities. It is integrated with the SAM II Financial system. The purpose of this course is to provide an introduction to SAM II HR. In this topic, you will learn the basic functions and benefits of SAM II HR.

## **HR PROCESS**

The functionality provided by SAM II HR includes the following:

- Position Control
- Employee Maintenance
- Deductions & Benefits

Let us briefly review the benefits of each of the functional areas.

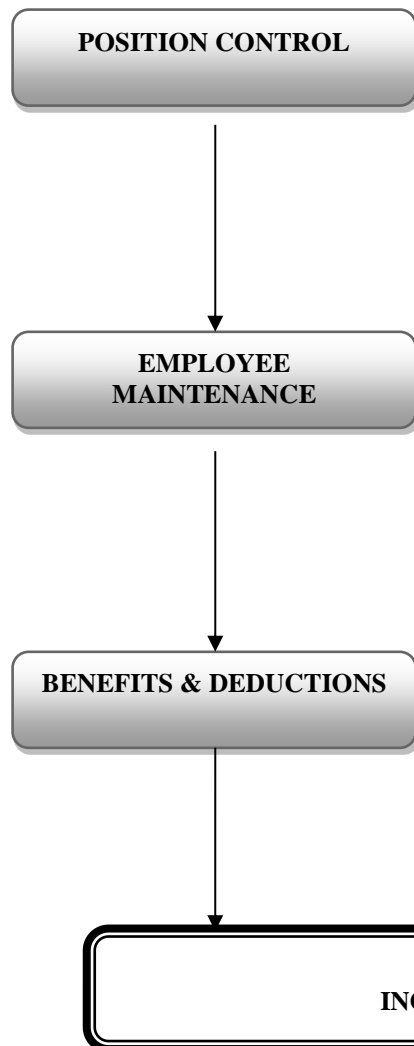
### **POSITION CONTROL**

The HR process begins with establishing and authorizing positions in the Position Control subsystem. The position record contains title data as well as other attributes such as salary grade, work location, default accounting data, and payroll group. The effective-dating feature and the real-time updating capability allow inquiry of the latest position status that controls hiring and recruitment.

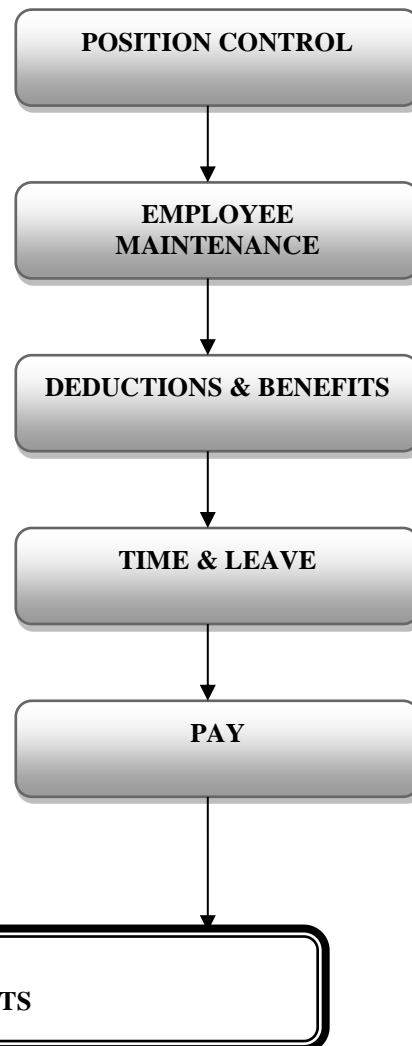
The functions described above will benefit the State of Missouri in making effective decisions necessary for staff planning, human resource budgetary control, position monitoring, and position analysis.

## HR PROCESS AND PAY PROCESS

### HR PROCESS



### PAY PROCESS



# **HR PROCESS**

## **EMPLOYEE MAINTENANCE**

The Employee Maintenance subsystem provides the functions of recording employee information, hiring employees, performing in-service personnel actions and separating employees. You must have an approved vacant position before you can hire an employee. Once a person is hired, the basic information that identifies them is entered into the employee database. Employee assignment data ties each employee to an authorized position within an agency/organization. Using the effective-dating feature, the subsystem maintains detailed records of personnel actions performed on employees.

The functions described above will enable the State of Missouri to view the latest employee information online. The effective-dating feature allows the recording of a complete history of changes and updates made to employee records.

# **HR PROCESS**

## **DEDUCTIONS & BENEFITS**

The Employee Benefits subsystem supports the functionality of defining benefit eligibility rules, identifying a specific benefit option available to an employee, outlining voluntary and non-voluntary deductions and establishing employee benefits and deductions.

The functions described above will enable the State of Missouri to accurately set up tax withholding calculations for city, state and federal entities and improve information tracking regarding employee benefits and deductions.

# **PAY PROCESS**

The functionality provided by SAM II HR includes the following:

- Position Control
- Employee Maintenance
- Benefits and Deductions
- Time and Leave
- Pay

Let us briefly review the benefits of each of the functional areas.

## **POSITION CONTROL**

In addition to entering descriptive information of positions in the HR process, pay parameters are also entered in the Position Control subsystem to facilitate the pay process. When defining a position in the Position Control subsystem, the accounting distribution can be assigned to an employee or employees within this position. In addition, the “Title” entered defines and identifies the employee’s position and provides a salary range guideline. The “Sub-Title” determines pay policy, deduction policy and leave policy.

## **EMPLOYEE MAINTENANCE**

The Employee Maintenance subsystem provides the functionality to manage an employee's pay information. Once an applicant is hired into a position, pay information entered in the Position Control subsystem will be used automatically on the Employee Maintenance screens unless overridden. If the position data is not appropriate, the user can override information including pay parameters. Flexibility in associating an employee with a pay setup is part of maintaining the employee in the system. The established pay data will then be used in the pay process.

## **DEDUCTIONS & BENEFITS**

The relationship of employee benefits and deductions to specific “policies” established by the employee’s assignment is an important component. In addition to mandatory tax withholdings, there are a variety of payroll deductions that may be withheld from each paycheck such as deferred comp, credit union, saving bonds, etc. All of this information plays a crucial role in facilitating a pay process.

# **PAY PROCESS**

## **TIME AND LEAVE**

The time-reporting process in SAM II HR supports the functionality of entering, correcting, and viewing time and attendance data at the employee level as well as the pay location level. It also allows employees to electronically submit leave requests that supervisors subsequently approve.

The functions described above will accommodate time reporting not only for positive-paid (hourly) employees. Time will also be entered for exception-paid (salaried) employees where they take leave, earn overtime, or change their accounting distribution information. SAM II HR will also implement pay processing on a semi-monthly basis. Accurate time and leave reporting is critical because it determines the accuracy of employee paychecks generated by the pay process.

## **PAY**

Using information fed from the subsystems described above, SAM II HR supports automated leave accrual and accounting, automated pay calculations, online payroll adjustments and comprehensive cost accounting capabilities. Payroll processing has activities associated with individual agencies as well as with the administrative groups in the Office of Administration (OA).

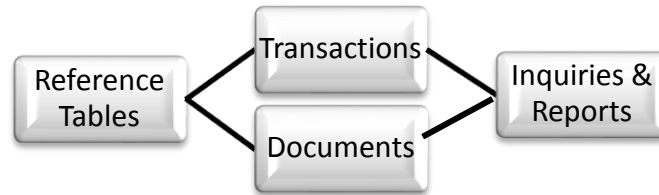
SAM II HR enables the State of Missouri to run pay processes on a semi-monthly basis. It will also maintain detailed and summary payroll history and allow online inquiries.



# SAM II HR COMPONENTS

This section provides a basic understanding of how information is organized and stored in the system. SAM II HR database consists of the following major data components:

- Tables
- Transactions
- Documents
- Inquiries



Tables are windows containing information that is referenced by a variety of activities in the system. As part of your work activities, you may use tables to maintain and update information. Reference tables are used to validate entries in the system. They require a one-time setup and are maintained by the Office of Administration. “Simple” tables contain multiple table entries; “complex” tables contain one table entry with more detailed information.

Transactions are used to record and maintain data for an employee or a position. A Transaction ID is associated with every transaction. If transaction data is accepted, it is immediately written to the system database; once a transaction is initiated, it is stored on a transaction listing table.

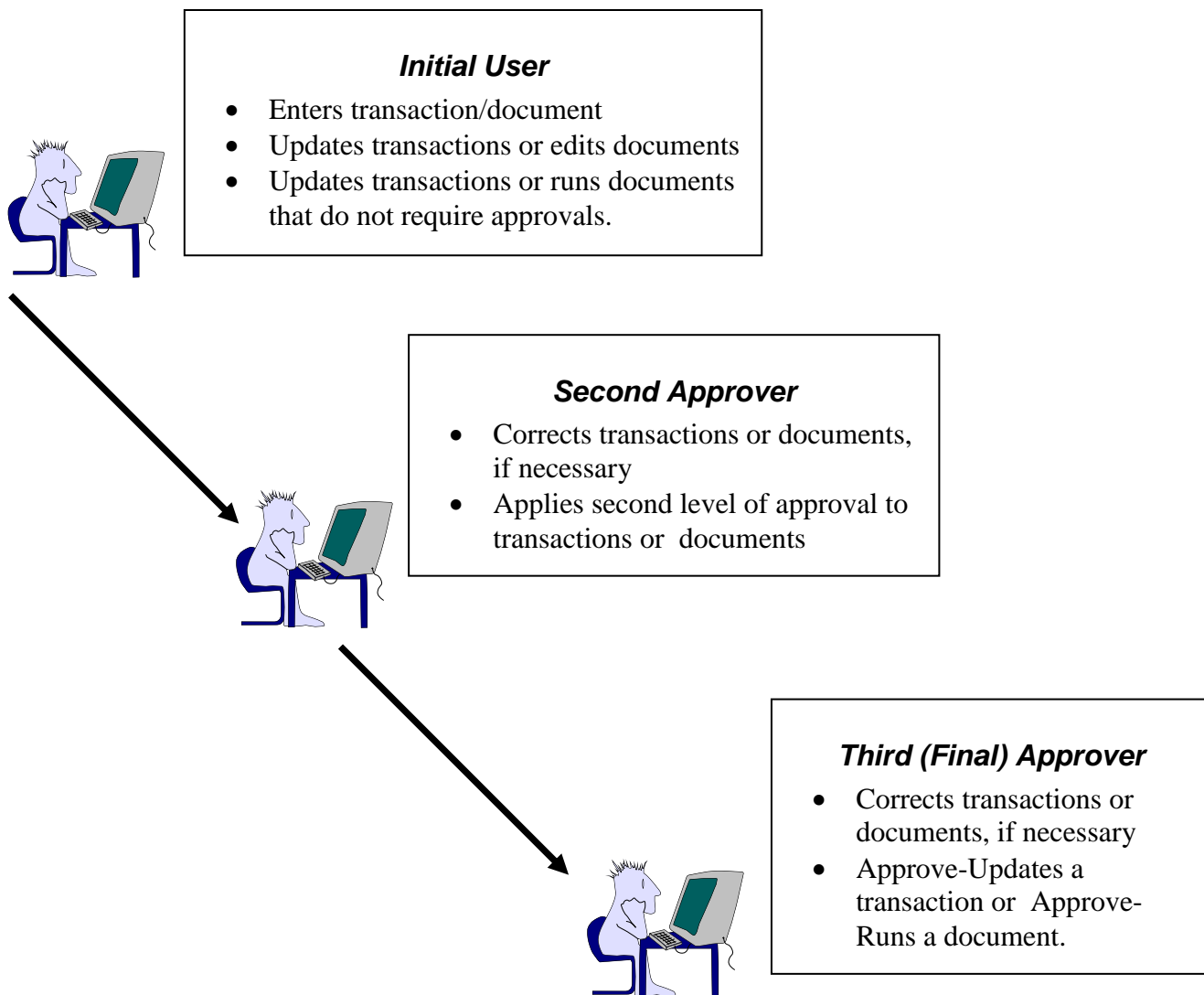
Documents are used to record information specific to an employee’s accounting, pay and leave activity. They contain time-sensitive data. SAM II HR validates the data entered in documents and either accepts or rejects them. Accepted documents update the database immediately; rejected documents are stored with their associated error messages until deleted or corrected. Once a document is created, it is stored on a document listing table.

The inquiries component of the system stores position and employee information as well as the results of each pay period’s calculations. They are used to easily view pertinent data on-line. Some inquiries contain a summary of cross-reference information taken from several tables, which allows you to see highlights or information pertaining to a specific topic without having to open additional windows.

## TOPIC 2 – THE SAM II HR DESKTOP & NAVIGATION

The contents of this topic are aimed to provide a basic understanding of security and Workflow, present the sign-on process and familiarize users with the navigation tools. The visual images used in the graphical user interface (GUI) of SAM II HR Desktop are easy to recognize and will help simplify tasks to be performed.

### SECURITY SETUP EXAMPLE: REQUIRING 3 LEVELS OF APPROVAL (Specific Security Set-Up Will Vary By Agency. Below is a of Sample Security Set-Up and Roles)



# SECURITY

SAM II HR has security features and safeguards built into the software. The security is structured around business areas and agency or agency/ organization combinations. Users are assigned security access based on the type of actions they need to take while performing assigned HR/Payroll activities.

A user enters a unique User ID and Password to connect to SAM II HR. The system then looks at this User ID to determine – 1) the business groups to which the user has access; 2) the type of actions (add, modify, update, approve, view) the user is authorized to perform; and 3) the agency or agency/organization combination for which the user has authority to view or carry out assigned tasks.

The “Approvals” in SAM II HR can be up to five levels. The approvals required for completion of each transaction or documents are determined based upon the role of that transaction or document. These are state-wide and apply to all agencies. Who applies the final approvals varies based upon whether an agency is a UCP or Non-UCP agency. If a transaction or a document requires five levels of approvals, five “Electronic Signatures” that represent five approvals must be applied to this transaction or document in order to be processed and accepted by the system. The approvers can range from agency supervisors to OA authorities depending upon the policies and procedures for that transaction or document. Approvals are hierarchical in nature for transactions. In other words, if I can apply a level 3 approval, I can also apply level 1 and level 2.

SAM II HR transactions and documents are organized by the following security areas. You will need to identify what type of security is needed for each area when setting up a new user or when changing the security access of a current user.

- |  |                                 |                        |
|--|---------------------------------|------------------------|
| ➤ Establish Positions                      | ➤ Maintain Personnel Attributes | ➤ Timekeeping          |
| ➤ Authorize Positions                      | ➤ Establish & Refund Deductions | ➤ Individual Timesheet |
| ➤ Establish & Maintain Employee Attributes | ➤ Establish & Maintain Benefits | ➤ Group Timesheet      |
|  |                                 | ➤ Payroll              |

# THE TWO TYPES OF WORKFLOW

## Rule-Based Workflow

Automatic routing to aid in document & transaction processing.

- ❖ Workflow rules are pre-defined
- ❖ Work Units can be routed to individual Worklists
- ❖ Automated notifications can be sent via e-mail
- ❖ Rules can be triggered from on-line and off-line processing events

## Ad hoc Workflow

Internal communication tool; facilitate table updates of centrally maintained tables.

- ❖ Not tied to pre-defined rules
- ❖ Subject to Security Restrictions
- ❖ Route Work Units to others' Worklists
- ❖ Compose SAMII e-mail message attaching tables, document, and/or transactions to e-mail messages
- ❖ Attachment security requirements follow standard security
- ❖ Manual routing security restrictions

# WORKFLOW

Workflow is a SAM II HR system tool that manages the flow of transactions and documents. Workflow is used to move transactions or documents from one location to another in order to facilitate their processing. Rules are defined to automatically move transactions or documents through the approval chain.


In SAM II HR, transactions and documents are termed “Work Units.” Items sent via Workflow appear in an electronic to-do list called a “Worklist” which is also a component of the desktop.

Agencies may set up “Workgroups” to receive and approve certain types of Work Units (transactions and documents). Work Units sent to a given Workgroup will appear in each member’s Worklist. If a process action is performed on a Work Unit, it will be removed from the Worklist of all members and sent to another location. Using Workgroups provides a level of insurance that items will be processed promptly even when one or another Workgroup member is absent or focusing on other activities.

Rules are pre-defined and are triggered by online and off-line processing events. The Ad Hoc feature of Workflow is not tied to pre-defined rules. It allows special and exception routing of transactions and documents. Manual Routing allows users to send transactions or documents to their user’s Worklist. Using the e-mail function, users can attach tables, documents, and transactions and then route them to other SAM II users. Recipients must have valid security and be set up to receive e-mail. Not all SAM II users will have e-mail authority upon implementation.

Workflow and Security are two distinct components of SAM II HR that work together to streamline the flow and approval of transactions and documents. While Workflow is a tool to move Work Units from one point to another, security defines the level of authority individuals have to perform assigned tasks.

# DESKTOP SIGN-ON WINDOW



## SAM II HR LOG-ON PROCESS

This section provides the opportunity to sign on to the application server and to access SAM II HR. Our class computers are already signed on to the local network server. Let's review the Log-on process.

### SAM II HR DESKTOP SIGN-ON

You will double-click on SAM II HR Desktop icon on your desktop to launch SAM II HR. The **Desktop Sign-on** window will appear. When you actually sign on, you will be entering the User ID and initial Password you have been provided.

To log on the first time:

- Step 1** Double-click SAM II HR Desktop icon on your PC.
- Step 2** In the **USER ID** field, type the User ID assigned to you.
- Step 3** In the **PASSWORD** field, type the password given to you.
- Step 4** Click <OK> when completed.

The **Server Sign-on** window will display the first time you log in.

## SAM II HR SERVER SIGN-ON

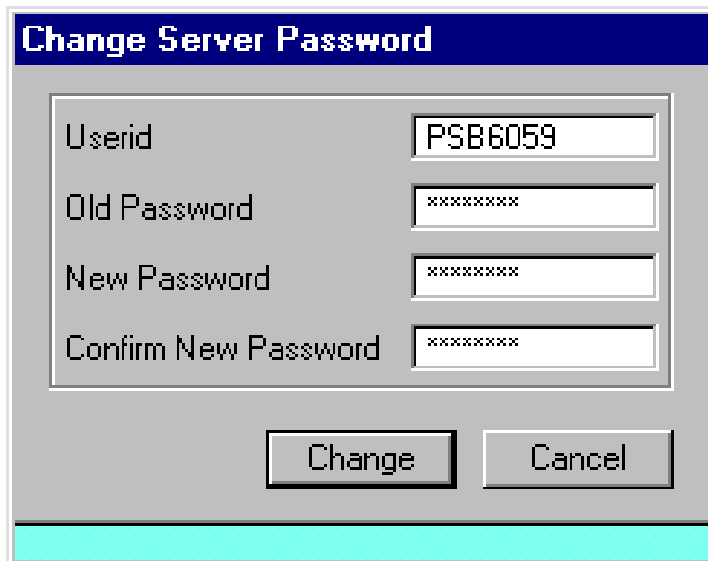
In this class, the **Server Sign-on** window will NOT appear since this is not the first time the log-on process has been done using the User ID and Password provided to you. The **Server Sign-on** prompt only appears the first time you log on to SAM II HR. Information provided here is for future reference. After you complete the steps to sign on to the desktop for the first time at your respective agencies, you will be prompted to sign on to the server. The **USER ID** field of the **Server Sign-on** window is automatically populated with the User ID you used for the desktop sign-on. Although the **Server Sign-on** uses the same password, you are required to enter it again. Then, you must change your Desktop Sign-on password to something only you will know.

To access the **Change Server Password** window:

**Step 1** In the **PASSWORD** field, type your initial password.

**Step 2** Click <PASSWORD> when completed.

The **Change Server Password** window appears.



The screenshot shows a dialog box titled "Change Server Password". It contains four input fields: "Userid" with the value "PSB6059", "Old Password" with "xxxxxxx", "New Password" with "xxxxxxx", and "Confirm New Password" with "xxxxxxx". At the bottom, there are "Change" and "Cancel" buttons. The dialog box has a blue title bar and a light gray background.

# SAM II HR LOG-ON PROCESS

## CHANGE SERVER PASSWORD WINDOW

Again, the **Change Server Password** window will not appear in this class. When you log on to SAM II HR for the first time at your agency, you will be prompted to change your password. Passwords appear as asterisks (\*) to ensure privacy.

- Step 1** In the **USERID** field, type your User ID.
- Step 2** In the **OLD PASSWORD** field, type the Password given to you.
- Step 3** In the **NEW PASSWORD** field, type your new Password, something only you will know. Your new Password must be 6 to 8 characters. It must contain at least one number and it must begin with a letter.
- Step 4** In the **CONFIRM NEW PASSWORD** field, enter the Password from Step 3.
- Step 5** Click **<CHANGE>**.

The **ADVANTAGE Workflow Sign-on** window appears.

## SAM II HR WORKFLOW SIGN-ON

After you successfully change your password, the **Workflow Sign-on** window displays.

To sign on for Workflow e-mail.

- Step 1** See Student Card for the data to enter in the **USER ID** field.
- Step 2** Leave the **PASSWORD** field blank.
- Step 3** Click **<OK>**.

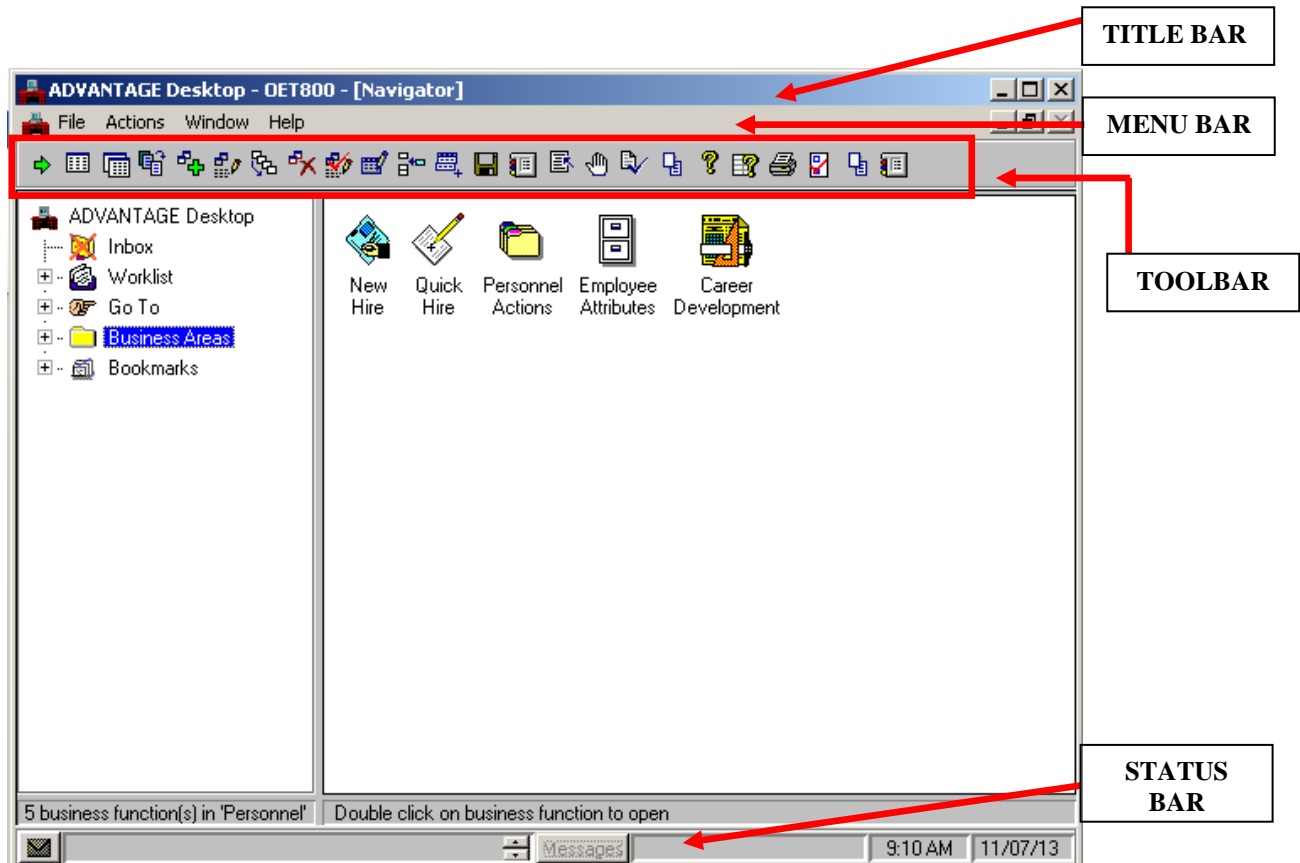
**Note:** In production, your Agency Technical Representative will assign the appropriate Workflow E-mail User ID and can set up a profile so that this sign on window does not appear.

SAM II HR **Desktop** appears.



# SAM II HR DESKTOP

## NAVIGATOR WINDOW



- ✧ Title Bar Displays the Desktop title and User ID
- ✧ Menu Bar Displays the menu commands
- ✧ Toolbar Displays quick access to many of the menu commands
- ✧ Status Bar Displays system-generated messages and current date/time

# SAM II HR DESKTOP

You are now signed on to SAM II HR Desktop and connected to the system. SAM II HR Desktop is the work area where you perform your business activities. The Navigator window of the system is open.

The Desktop provides the following tools to assist you: the Title Bar, Menu Bar, Toolbar and Status Bar.

## TITLE BAR



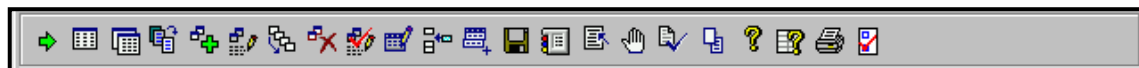
The Title Bar displays the Desktop title and your User ID.

## MENU BAR



The Menu Bar displays the dropdown menus available for the active window.

## TOOLBAR



The Toolbar offers shortcuts to the menu commands. The toolbar buttons allow you to work efficiently within the system.

## STATUS BAR

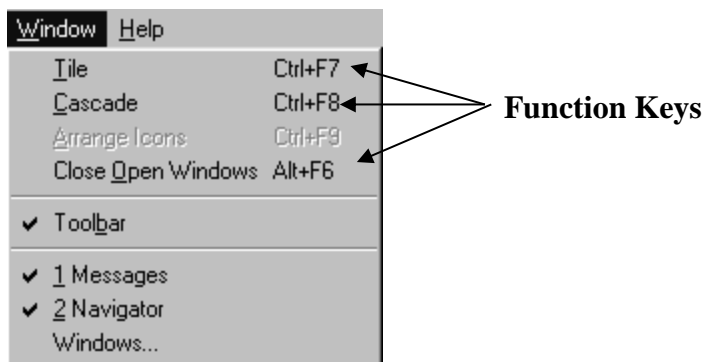


The Status Bar, which appears at the bottom of the Desktop, displays system-generated messages as you do your work and current date and time.

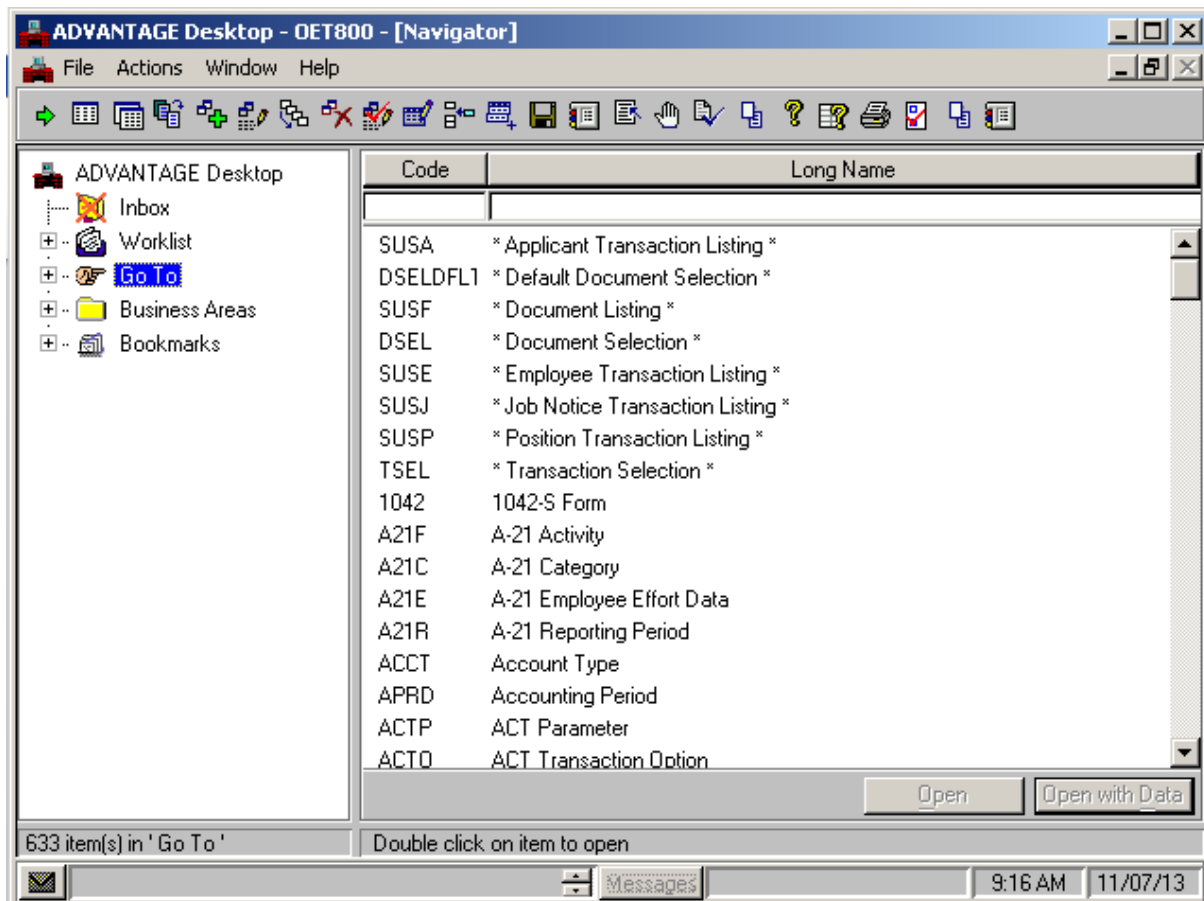
# SAM II HR DESKTOP

## TOOLBAR BUTTONS AND FUNCTION KEYS

Although SAM II HR is a menu-driven system, it also offers shortcuts to the menu commands to allow you to work more efficiently in the system. The most frequently used SAM II HR commands can be executed by using one of three different methods: pull-down menus from the Menu Bar, function keys, and toolbar buttons. As illustrated below, function key shortcuts to menu commands are found to the right of the menu command (in the menu itself). To execute a command using a function key, simply press the appropriate combination of keys. To execute a command using a toolbar button, click on the button with your mouse pointer. Placing the pointer over the button briefly will show you the full name of any button on the toolbar.



# GO TO WINDOW



# GO TO WINDOW

The Go To window is one of SAM II's navigation features. It provides quick access to any window in SAM II HR. In this class, we will mainly utilize the Go To function for navigation. The Go To window is accessed by clicking on the Go To icon in the left panel of the Navigator window. The Go To window will be displayed in the right panel. The Go To window is a list of every table, transaction, document, and inquiry in SAM II HR. Using the Go To window, you can quickly search for and open any window.

## LOCATING WINDOWS USING GO TO

The list in the Go To window can be organized alphabetically by the window "Code" or the window "Long Name". To organize the list by code, click on the **CODE** column header. To organize the list by long name, click on the **LONG NAME** column header. To locate a window, type a code or name in the text box under the appropriate column header. SAM II HR system will search while you type. You can narrow your search by clicking on the '+' sign next to the Go To icon. A list of category folders will appear. Use the '+' signs next to these folders to access subcategories and shortened window lists.

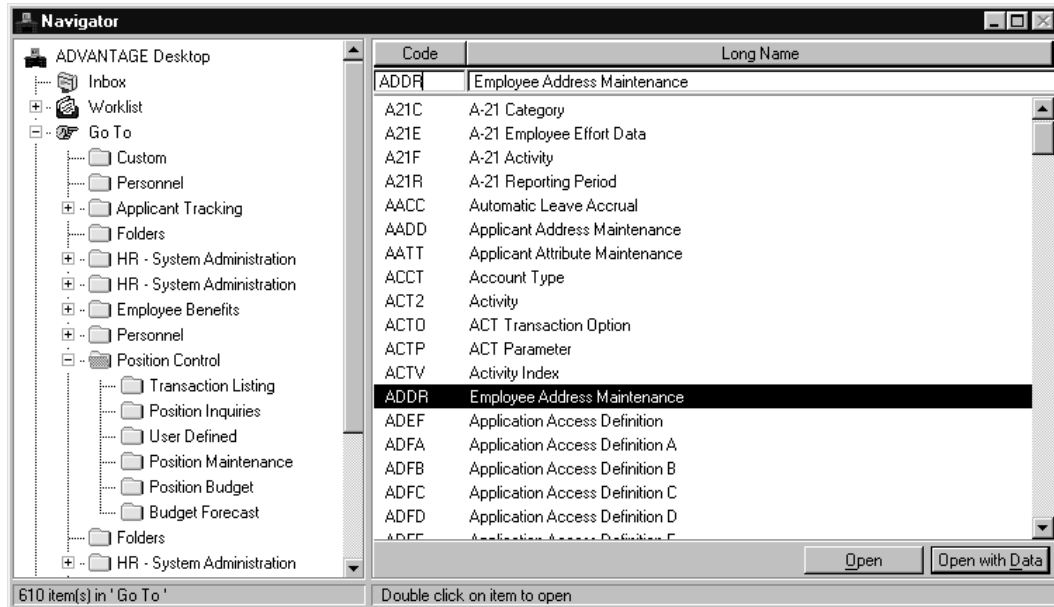
## OPEN AND OPEN WITH DATA

### Open button:

Using the <**OPEN**> button (or double-clicking the highlighted window choice) will open any window.

- Step 1** Click on the **Go To** icon in the left panel of the Navigator window.
- Step 2** Type **QXRF** in the text box under the **CODE** column header.
- Step 3** Click on the <**OPEN**> button to open the window. The blank "Employee Roster by Employee Name" window appears.
- Step 4** Select **Display: Browse Data** to view records.

# GO TO WINDOW



# EMPLOYEE ADDRESS MAINTENANCE (ADDR)

The screenshot shows the 'Employee Address Maintenance' form. It contains the following fields and options:

- Name: ALLEN, JENNY
- Employee ID: 010 - 51 - 0245
- Effective Date: 04 / 28 / 00
- Expiration Date: 99 / 99 / 99
- Release Home Address: ☒ Yes ☐ No
- ☒ Mailing Address Same as Home Address
- Residency: ☐
- Home Address:
  - 811 SYBIL ST.
  - #205
  - City: JEFFERSON CITY State: MO
  - Zip: 65101 - County: 051
  - Phone: (573 ) 555 - 1234 Ext: Country: USA
- Mailing Address:
  - City: State:
  - Zip: - Country:

# GO TO WINDOW

## Open with Data button:

You can also use the Go To window to transfer common data from one window to another. This allows you to see related information about a record as you move between tables without retyping data. For example, you may look up an employee on the Employee Roster by Employee Name (QXRF). If you wished to see that particular employee's address, you would open the Employee Address Maintenance (ADDR) window using the **<OPEN WITH DATA>** button. The address record for the employee you looked up on the QXRF will be displayed automatically.

**Step 1** With the records visible on the Employee Roster by Employee Name (QXRF) window, highlight the record for an employee listed by clicking on their name.

**Step 2** Click on the **<OPEN NAVIGATOR>** toolbar button (far left on the toolbar) to return to the Go To window.



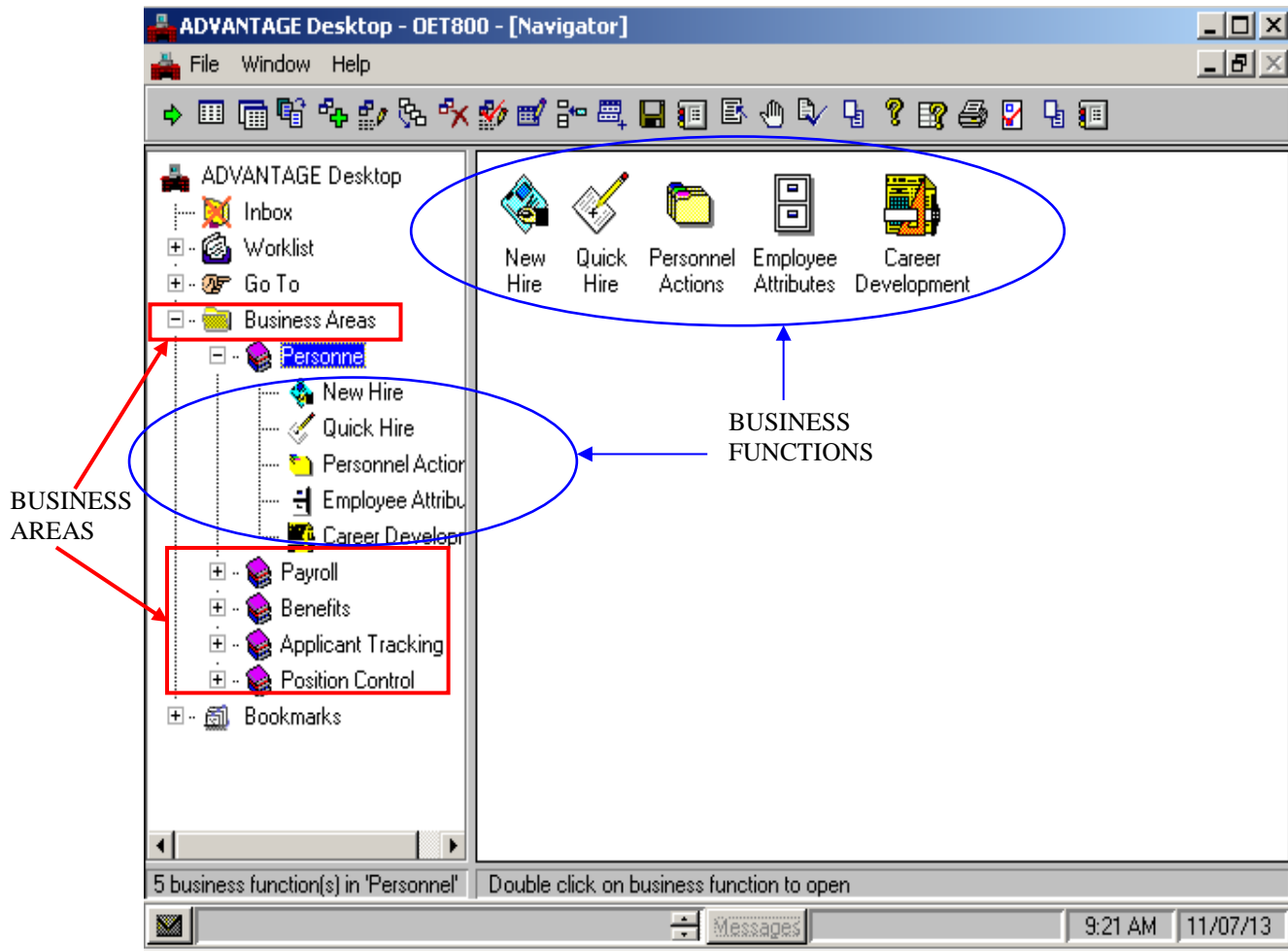
**Step 3** Select the next window by typing **ADDR** in the **CODE** column header.

**Step 4** This time, click on the **<OPEN WITH DATA>** button to open the window. The window opens and, at the same time, the desired information is carried onto the screen.

**Step 5** To close all windows on the desktop simultaneously, select **Window: Close Open Windows**.

**Step 6** Repeat the steps for the PSMT and the QVER tables.

# BUSINESS AREAS AND BUSINESS FUNCTIONS





# BUSINESS AREAS AND BUSINESS FUNCTIONS

SAM II HR includes Business Areas and Business Functions. Business Areas represent groupings of work responsibilities. Each Business Area is composed of Business Functions, which represent specific tasks related to the Business Areas. The Business Functions provide quick access to the windows you need to perform your tasks.

The following activities will be covered to help you become familiar with Business Areas and Business Functions:

- Select a Business Area
- Select a Business Function
- Open windows in the Business Function
- Navigate between windows in the Business Function

## OPENING A BUSINESS AREA AND BUSINESS FUNCTION

To begin working, open a Business Function for a selected Business Area.

**Step 1.**        **Step 1** Click on the '+' sign next to the **Business Areas** icon in the left panel of the Navigator window to see the list of available areas.

**Step 2.**        **Step 2** Scroll down if necessary and select the ***Personnel*** Business Area by clicking on the icon in the left panel of the Navigator window.

The Business Function icons associated with that Business Area appear in the right panel of the Navigator window.

**Step 3**        Open the *New Hire* Business Function by double-clicking on the icon in the right panel of the Navigator window.

# BUSINESS AREAS AND BUSINESS FUNCTIONS

Selecting the "New Hire" Business Function,



opens the first associated window (the ESMT):

The screenshot shows the 'Employment Status Maintenance' window. The title bar reads 'ADVANTAGE Desktop - OET800'. The menu bar includes 'File', 'Edit', 'Display', 'Process', 'Window', and 'Help'. The toolbar contains various icons for file operations and navigation. The form fields are as follows:






Employee ID	000 - 00 - 0001			Appointment ID		Alternate ID	
Prefix	First	Middle	Last				
	ABRAM	B	GRAGG				
Effective Date	08 / 01 / 13		Expiration Date	99 / 99 / 99		Original Appt D	

Below the form fields are tabs: 'Job Assignment', 'Dates', 'Assignment Attributes', 'Pay Parameters', and 'Ce'. The 'Job Assignment' tab is active, showing 'Personnel Action / Reason' as 'NHIRE / A01' and 'Job Status' as 'C'. Under 'Assignment Information', there are fields for 'Agency' (375), 'Organization' (1375), 'Position Number' (0000001), '% Full-time' (1.0000), 'Table Driven Pay' (radio buttons for 'Use Table', 'Do Not Use Table', 'Selection Required'), 'Step' (D), 'EEO Full-time' (radio buttons for 'Yes', 'No', 'N/A'), and 'Union Affili'. Under 'Application Information', there are fields for 'Applicant ID' and 'Job Notice ID'. At the bottom, a taskbar shows 'Navigator...' with 'Min' and 'Close' buttons, and a list of windows: 'ESMT', 'ADDR', 'EMER', 'ATTR', and 'TAX'. A status bar at the very bottom shows 'END OF SCAN' and 'Messages'.

# BUSINESS AREAS AND BUSINESS FUNCTIONS

## BUSINESS FUNCTION BUTTONS

When you open a Business Function by double-clicking on the icon in the right panel, the first window associated with that particular Business Function opens and several buttons appear at the bottom of the window. Each button represents a window included in the Business Function. You can place your pointer over the window button to see the full name of the window. The buttons help you navigate to the other windows in the Business Function, as described below.

Click on...	To...
	Bring the Navigator window to the front of all other open windows.
	Minimize all open windows associated with the current Business Function.
	Close all windows in the Business Function at once and exit the Business Function.
	<p>Select a window in the Business Function. Each window is identified by its code. The appearance of the buttons gives you information about the status of the window.</p> <ul style="list-style-type: none"><li>• In the example in the left column of this table, the <b>&lt;ESMT&gt;</b> (Employee Status Maintenance) button is pushed in and the window name is in bold letters, indicating that it is currently the active window.</li><li>• <b>&lt;ADDR&gt;</b> (Employee Address Maintenance) is in bold letters, but the button is not pushed in. This indicates that it is also open, but is not currently the active window (i.e., it is minimized or open in the background).</li><li>• <b>&lt;EMER&gt;</b> (Emergency Contact Information) is in plain text, indicating that it is not open.</li></ul>
	If there are more window buttons in the Business Function than can be displayed at one time, use these arrows to scroll left or right to see all of the available windows.

# BUSINESS AREAS AND BUSINESS FUNCTIONS

**ADVANTAGE Desktop - 0A134**

File Edit Display Process Window Help

**Employee Address Maintenance**

Name: ALLEN, JENNY

Employee ID: 010 - 51 - 0245

Effective Date: 04 / 17 / 00 Expiration Date: 04 / 27 / 00

Private Home: ☐ Yes ☐ No ☒ Not Applicable ☒ Mailing Address Same as Home Address

Residency: ☐

Home Address: 811 SYBIL ST.  
#205  
City: JEFFERSON CITY State: MO  
Zip: 65101 - County: 051  
Phone: (573 ) 555 - 1234 Ext: Country: USA

Mailing Address:  
City: State:  
Zip: Country:

Application Information:  
Applicant ID: Job Notice ID:

Navigator... Min Close **ESMT ADDR** EMER ATTR TAX

END OF SCAN Messages 1:43 PM 05/01/00

**ADVANTAGE Desktop - 0A134**

File Edit Display Process Window Help

**Employee Tax Parameters**

Name: ALLEN, JENNY

Employee ID: 010 - 51 - 0245 Appointment ID:

Effective Date: 04 / 17 / 00 Expiration Date: 99 / 99 / 99

Tax Class: 1 Marital Status: Federal Tax: S Tax Allowance: Federal: 1

FICA Class: 1 State Tax: S State: 1

Last W-4 File Date: / / Additional State: 1

	Deduction Type	Deduction Plan	Effective Date	Expiration Date	Deduction Amount	Deduction Rate
1						
2						
3						
4						
5						

Navigator... Min Close **ESMT ADDR** EMER ATTR **TAX**

END OF SCAN Messages 1:44 PM 05/01/00


# BUSINESS AREAS AND BUSINESS FUNCTIONS

## CARRYING AN ENTRY FORWARD

You can automatically carry forward an entry from one window to another in the Business Function, similar to the Open with Data command from the Go To window. This allows you to see related information that was previously entered as you move among the windows in the Business Function without retyping data.

For example, in the **New Hire** Business Function, you can see information about a specific employee as you select each window in the Business Function.

**Step 1** Enter **000 00 0001** in the **EMPLOYEE ID** field on the ESMT window.

**Step 2** Select **Display: Browse Data** from the pull-down menu or click the **<BROWSE DATA>** toolbar button. 

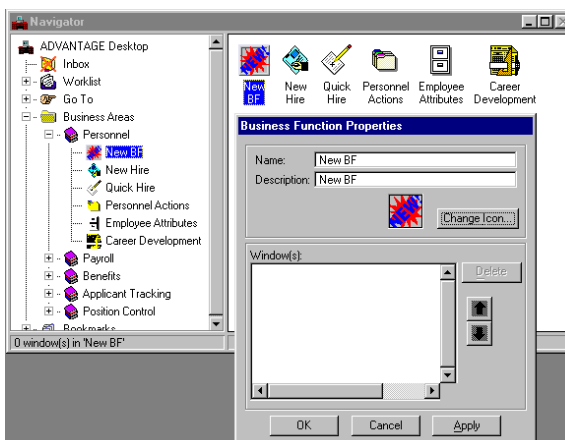
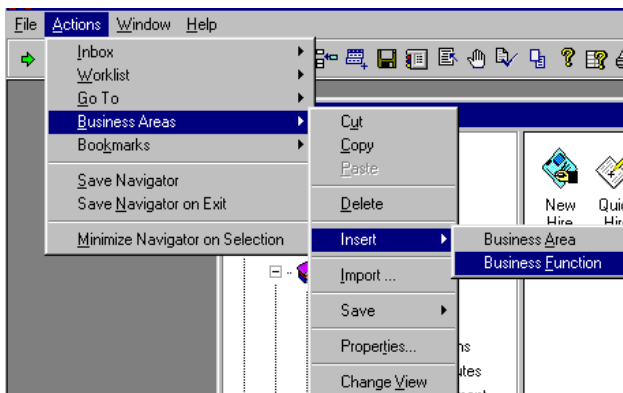
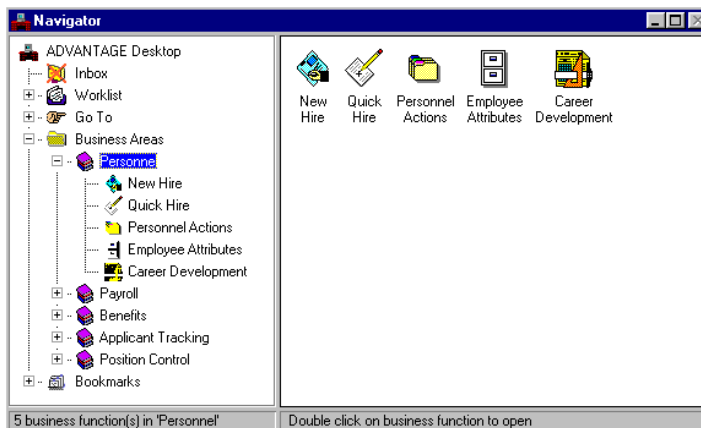
This action causes the fields on the ESMT to be populated with the employee's information.

**Step 3** Open the ADDR window by clicking on the **<ADDR>** button at the bottom. The ADDR window opens, displaying information for the employee.

**Step 4** Open the TAX window by clicking on the **<TAX>** button to see tax information on the employee.

**Step 5** Click on the **<CLOSE>** button to exit the Business Function.

# BUSINESS AREAS AND BUSINESS FUNCTIONS



# BUSINESS AREAS AND BUSINESS FUNCTIONS

## ADDING A BUSINESS FUNCTION TO A BUSINESS AREA

Typically, when you sign on to SAM II HR system, you will open a Business Function and complete all your work within that Business Function. And, generally, the Business Functions that you need will be within that particular Business Area. If they're not, however, you can add a Business Function to a Business Area. The steps below are provided as a reference if you wish to edit your Business Areas and Business Functions

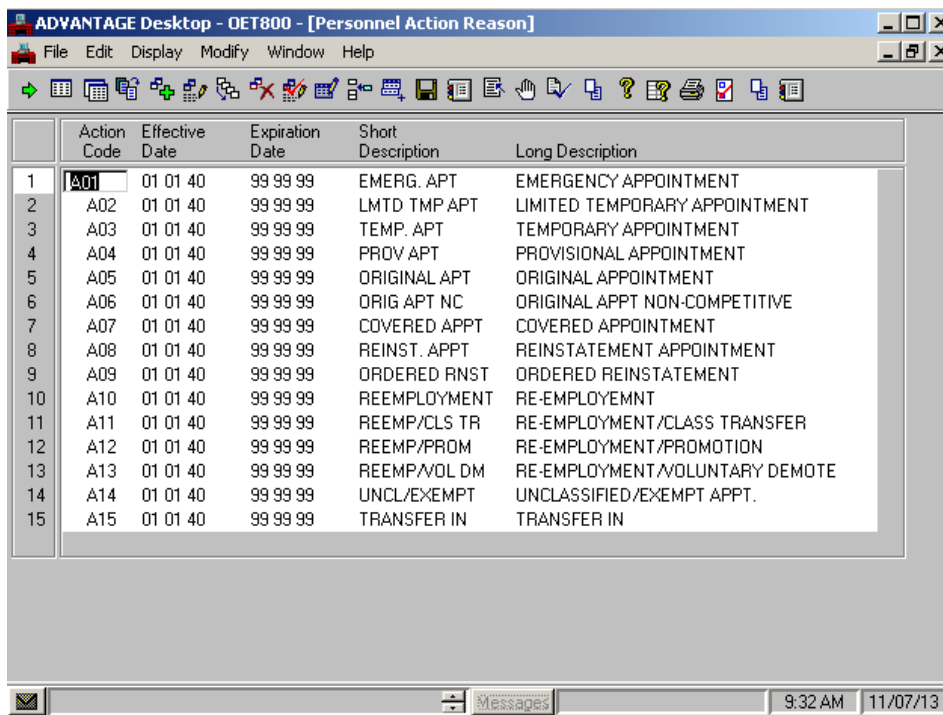
- Step 1** Click on the “+” sign next to the “Business Areas” icon. Business Areas already established in the system will be displayed.
- Step 2** Highlight one of the Business Areas to which you want to add a Business Function by clicking once on the book sign next to that Business Area.
- Step 3** Select **Actions: Business Areas: Insert: Business Function** from the pull-down menus.
- Step 4** A new icon named “New BF” will be added. Right click on the icon and select the **Properties**. The Business Function Properties window will appear.
- Step 5** Enter the **NAME** and **DESCRIPTION** of the new Business Function. You may also change the icon by selecting the <**CHANGE ICON**> button.
- Step 6** Click <**APPLY**> and <**OK**>.
- Step 7** Click on the Go To icon. A complete list of windows in SAM II HR will appear.
- Step 8** Click and drag the window you want to include from the Go To window to the business function.
- Step 9** The Business Function Properties appear. Click on <**OK**> to add the window.

**Note:** You can rearrange the order of the windows by right-clicking on the Business Function, choosing **Properties**, and using the arrow keys. To remove a window from the list, select <**DELETE**>, again from the Business Function Properties window. You can also delete Business Functions within the Business Area by right clicking on the Business Function that you want to delete and selecting the **Delete**.

## TOPIC 3 –REFERENCE TABLES

The purpose of this topic is to define the role of reference tables, learn how to access them and understand the basic window help features. Reference tables provide information for online viewing by system users. The basic window Help features provide tools and shortcuts that allow users to perform tasks efficiently in SAM II HR.

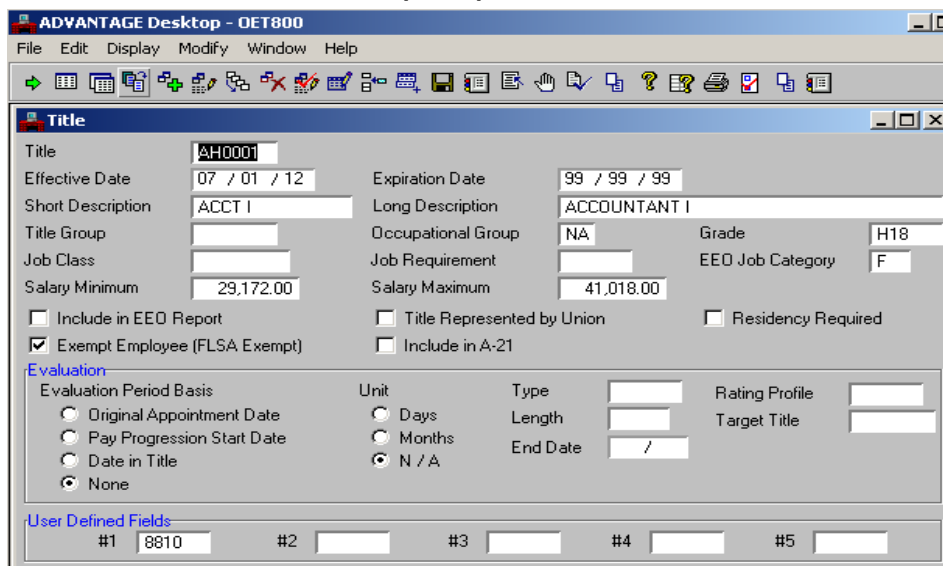
### SIMPLE TABLE: PERSONNEL ACTION REASON (PART)



The screenshot shows the ADVANTAGE Desktop window titled "OET800 - [Personnel Action Reason]". The window contains a table with the following columns: Action Code, Effective Date, Expiration Date, Short Description, and Long Description. The table lists 15 personnel action reasons, with the first row (A01) highlighted.

	Action Code	Effective Date	Expiration Date	Short Description	Long Description
1	A01	01 01 40	99 99 99	EMERG. APT	EMERGENCY APPOINTMENT
2	A02	01 01 40	99 99 99	LMTD TMP APT	LIMITED TEMPORARY APPOINTMENT
3	A03	01 01 40	99 99 99	TEMP. APT	TEMPORARY APPOINTMENT
4	A04	01 01 40	99 99 99	PROV APT	PROVISIONAL APPOINTMENT
5	A05	01 01 40	99 99 99	ORIGINAL APT	ORIGINAL APPOINTMENT
6	A06	01 01 40	99 99 99	ORIG APT NC	ORIGINAL APPT NON-COMPETITIVE
7	A07	01 01 40	99 99 99	COVERED APPT	COVERED APPOINTMENT
8	A08	01 01 40	99 99 99	REINST. APPT	REINSTATEMENT APPOINTMENT
9	A09	01 01 40	99 99 99	ORDERED RNST	ORDERED REINSTATEMENT
10	A10	01 01 40	99 99 99	REEMPLOYMENT	RE-EMPLOYMENT
11	A11	01 01 40	99 99 99	REEMP/CLS TR	RE-EMPLOYMENT/CLASS TRANSFER
12	A12	01 01 40	99 99 99	REEMP/PROM	RE-EMPLOYMENT/PROMOTION
13	A13	01 01 40	99 99 99	REEMP/VOL DM	RE-EMPLOYMENT/VOLUNTARY DEMOTE
14	A14	01 01 40	99 99 99	UNCL/EXEMPT	UNCLASSIFIED/EXEMPT APPT.
15	A15	01 01 40	99 99 99	TRANSFER IN	TRANSFER IN

### COMPLEX TABLE: TITLE (TITL)



The screenshot shows the ADVANTAGE Desktop window titled "OET800". The window contains a form titled "Title" with the following fields and values:

Field	Value
Title	AH0001
Effective Date	07 / 01 / 12
Expiration Date	99 / 99 / 99
Short Description	ACCT I
Long Description	ACCOUNTANT I
Title Group	
Occupational Group	NA
Grade	H18
Job Class	
Job Requirement	
EEO Job Category	F
Salary Minimum	29,172.00
Salary Maximum	41,018.00
Include in EEO Report	<input type="checkbox"/>
Title Represented by Union	<input type="checkbox"/>
Residency Required	<input type="checkbox"/>
Exempt Employee (FLSA Exempt)	<input checked="" type="checkbox"/>
Include in A-21	<input type="checkbox"/>

**Evaluation**

Field	Value
Evaluation Period Basis	<input type="radio"/> Original Appointment Date <input type="radio"/> Pay Progression Start Date <input type="radio"/> Date in Title <input checked="" type="radio"/> None
Unit	<input type="radio"/> Days <input type="radio"/> Months <input checked="" type="radio"/> N / A
Type	
Length	
End Date	/
Rating Profile	
Target Title	

**User Defined Fields**

Field	Value
#1	8810
#2	
#3	
#4	
#5	



# REFERENCE TABLE OVERVIEW

Reference tables define valid values for transaction and document fields, provide reference data to other tables and provide data used for processing and reporting.

Tables may be simple or complex. A simple table stores a value or values with related descriptions. It does not use secondary references from other reference tables. For example, the Personnel Action Reason (PART) is a simple table. It contains a value, effective date, expiration date and descriptions.

A complex table is an interactive table. It contains one or more fields that use other table(s) to verify values used. For example, the “Grade” field on the Title (TITL) table must be completed with a valid value that exists on the Grade (GRDE) table.

Both complex and simple tables contain the “Effective Date” field that allows tracking of changes of data by the period of time they remain effective.

## MENUS FOR WORKING WITH TABLES

As previously mentioned, tables are storage for information referenced by SAM II HR, such as valid codes for making entries on transactions and documents.

As you perform your tasks, you will work extensively with the tables that contain the information you need. You will also perform lookups to find specific entries in those tables. SAM II HR has hundreds of tables; you will likely use only a small subset of them in your daily activities.

When you are working in a table window, additional menus appear on SAM II HR menu bar. Note the function key combinations that are displayed to the right of the menu commands:

- **Display** – allows you to view the entries in a table.
- **Window** – allows you to organize and access the open windows on your desktop.

# USING HELP FEATURES IN A REFERENCE TABLE

SAM II HR desktop provides online help features to assist you with the window's content.

Let's access the Location (LOC) reference table.

**Step 1** Open the Go To window.

**Step 2** In the **CODE** field, type **LOC** and click the **<OPEN>** button.

The Location table appears. While we are in the Location (LOC) table, let's use the Online Help functions to get familiar with the help features and find out information about LOC.

The screenshot displays the 'ADVANTAGE Desktop - OET800' application window. The menu bar includes 'File', 'Edit', 'Display', 'Modify', 'Window', and 'Help'. The toolbar contains various icons for file operations, editing, and help. The main window is titled 'Location' and contains the following fields:

- Location: [Text Field]
- Effective Date: [ / / ]
- Expiration Date: [ / / ]
- Short Description: [Text Field]
- Long Description: [Text Field]
- Location Type ID:
  - ☒ Work
  - ☐ Pay
  - ☐ Both
- EEO Location: [Text Field]
- User Field: [Text Field]
- Address (Section Header):
  - [Text Field]
  - [Text Field]
  - City: [Text Field] County: [Text Field]
  - State: [Text Field] Zip: [Text Field] - Country: [Text Field]
  - Location 1st Phone: ([ ) - Ext [Text Field]
  - Location 2nd Phone: ([ ) - Ext [Text Field]

# ONLINE HELP

The Help menu assists users by providing information on valid values and other descriptive information about the system. The basic help features are:

- Desktop Help
- Window Help
- Field Help
- Find Code

## **DESKTOP HELP**

You can use **Help: Help on ADVANTAGE Desktop** to find information about how to customize the toolbar. This section also includes a listing of quick keys for all menu actions.

**Step 1**     Select **Help: Help on ADVANTAGE Desktop** to open the main Help window.

**Step 2**     Click on the topic you are interested in.

**Step 3**     Click on the X in the upper right corner of the Help window to close it.

## **WINDOW HELP**

You can use **Help: Window Help** to find information about an entire window and its uses.

**Step 1**     Open the window about which you want to find more information. In our example, we will find information about the LOC table.

**Step 2**     Select **Help: Window Help**. The Help window opens, describing the window and its uses.

**Step 3**     Click on a field name in the Help window for a description of that particular field and its uses.

**Step 4**     Close the Help window by clicking on the X in the upper right corner of the window.

# ONLINE HELP

## FIELD HELP

You can use **Help: Field Help** to find information about an entire field and its uses.

- Step 1** Place your cursor in the field about which you want to find more information. In our example, we will find information about the **LOCATION** field.
- Step 2** Select **Help: Field Help**. The Help window opens, describing the field and its use.
- Step 3** Click on the X in the upper right corner of the help window to close it.

## FIND CODE

If you are unsure about what type of data belongs in a particular field or what values are valid for a field, place the cursor inside the field and select **Help: Find Code**, or select the **<FIND CODE>** button on the toolbar.



The Find Code window appears, providing options for valid values for the field. Find the value you wish to copy to a table or a document by using the **Browse** and **More Data** buttons on the bottom of the Find Code window. When you locate the value you want, highlight that item and click on the **Select** button. The system will return to the window you were working in and place the selected value in the field you originally designated.

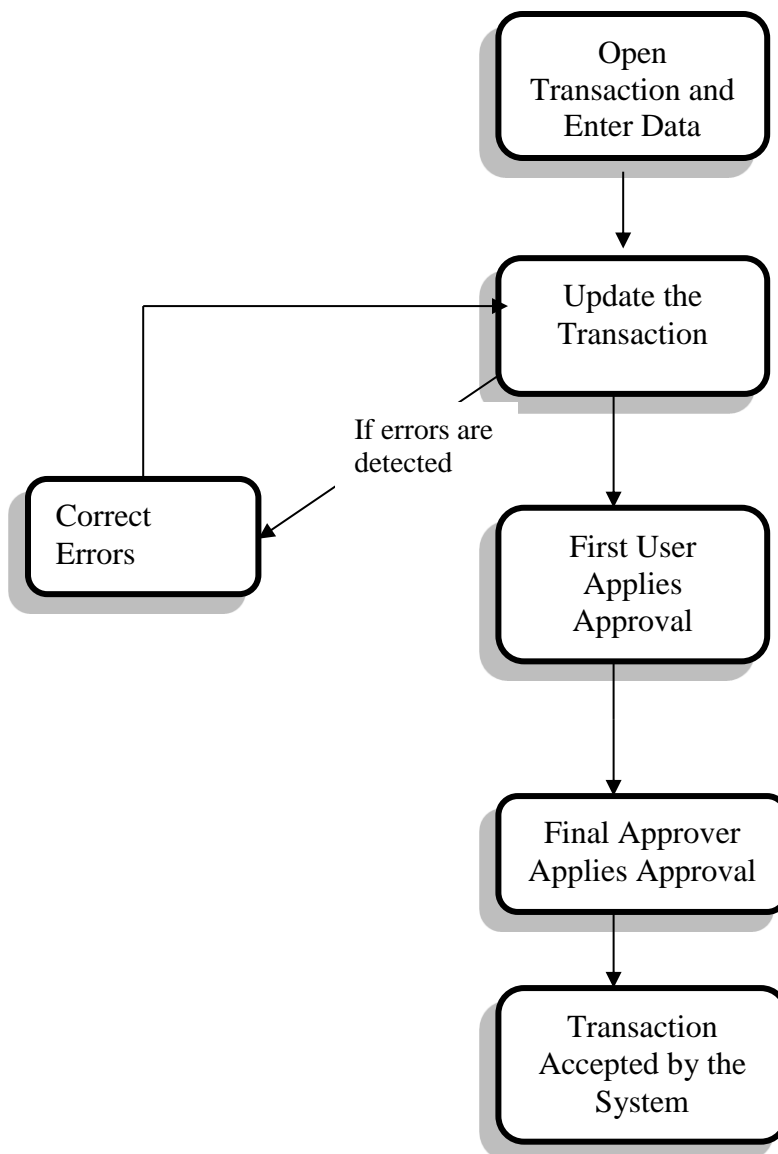
Use the Find Code feature to find out what values can be entered in the **COUNTY** field on the Location (LOC) window.

- Step 1** Place the cursor in the **COUNTY** field. Select **Help: Find Code** from the pull-down menus. The **Find Code on County** window opens.
- Step 2** Enter **MO** in the **STATE** field
- Step 3** Click the **<BROWSE>** button at the bottom of the Find Code window.
- Step 4** Use the **<MORE DATA>** button at the bottom of the Find Code window to browse through valid county codes.
- Step 5** Select a valid value by clicking on it and click **<SELECT>**. The system returns to the LOC window and places the selected code in the **COUNTY** field on the LOC window.

## TOPIC 4 – TRANSACTIONS

The purpose of this topic is to describe the purpose of transactions, familiarize users with the transaction processing cycle, and learn how to process a transaction. Transactions in SAM II HR can add, change, delete, or update information in the database. They are used to record information on personnel and payroll events, such as the establishment of a new position.

### TRANSACTION PROCESSING CYCLE



# TRANSACTIONS OVERVIEW

In SAM II HR, transactions are used to record and maintain data for employees and positions. The effective-dating feature of the system supports the ability to retain historic records and hold future-dated transactions.

The first step in the transaction processing cycle is the opening of the desired transaction window and entering data. After the information has been entered, the user must update the transaction. Selecting **Process: Update** checks for errors in the transaction. If the system detects any errors, error messages will be generated. The user corrects errors and updates the transaction again.

Once the transaction is error-free, the user applies any authorized approval levels. Depending on how many levels of approval need to be applied, the transaction may be routed to the next destination for further approval. Once the final approver applies his/her approval and updates the transaction, it will be accepted by the system.

The accepted transaction will remain on a suspense file, or Transaction Listing window, for a period of time. During this time period, the accepted transaction can be reviewed, but not changed. Suspense files will be covered in Topic 7 of this course.

Some examples of transactions are:

- Position Status Maintenance (PSMT)
- Employment Status Maintenance (ESMT)
- Employee Tax Parameters (TAX)

# POSITION STATUS MAINTENANCE (PSMT)

**Menu Bar** → **Title Bar**

**Header** → **Panel**

**Status Bar**

The screenshot shows the 'Position Status Maintenance' window in the ADVANTAGE Desktop environment. The window title is 'ADVANTAGE Desktop - OET800'. The menu bar includes File, Edit, Display, Process, Window, and Help. The header section contains input fields for Agency, Organization, Position Number, Effective Date, Expiration Date, Short Description, and Long Description. The main panel has two tabs: 'Position Attributes' and 'Organization Information'. The 'Position Attributes' tab is active, showing fields for Assignment Type (Permanent, Temporary), Location, Time Class, Union Local, Table Driven Pay (Use Table, Do Not Use Table, Determine by Employee), Payroll Number, Title / Sub-title, Position Status, Budget Prep, Civil Service Status, Pay Class, Title Category, FLSA Status (Exempt, Non-exempt, Not Required), FLSA Profile, Grade, Leave Policy, Salary Minimum, Pay Policy, Deduction Policy, and Salary Maximum. The status bar at the bottom shows a Messages icon, Tran ID, 9:39 AM, and 11/07/13.

Agency	Organization	Position Number	Effective Date	Expiration Date	Short Description	Long Description
			/ /	/ /		

**Position Attributes** | **Organization Information**

Assignment Type	Table Driven Pay	Position Status
<input checked="" type="radio"/> Permanent	<input type="radio"/> Use Table	
<input type="radio"/> Temporary	<input type="radio"/> Do Not Use Table	Budget Prep
Location	<input checked="" type="radio"/> Determine by Employee	Civil Service Status
Time Class	Payroll Number	Pay Class
Union Local	Title / Sub-title	Title Category

**Override Profile and Pay**

FLSA Status	FLSA Profile	Pay Policy
<input type="radio"/> Exempt	Grade	
<input type="radio"/> Non-exempt	Leave Policy	Deduction Policy
<input checked="" type="radio"/> Not Required	Salary Minimum	Salary Maximum

Messages Tran ID: 9:39 AM 11/07/13

# TRANSACTIONS OVERVIEW

Transactions in SAM II HR share the following features:

- Title Bar – displays the title of the window.
- Menu Bar – displays the menu options for the transaction. The following menu options are on the menu bar.
  - ♦ The **Edit** menu allows you to make changes specific to the transaction. The Edit menu also allows you to Track Work In Progress which we will discuss later in this course.
  - ♦ The **Process** menu allows you to update, delete, hold, and approve a transaction. **Process** menu transaction options are discussed later in this course.
  - ♦ The **Window Help** option appears on the **Help** menu. This option displays the transaction description and the fields that are on that specific transaction.
  - ♦ The **Display** menu allows you to Browse Data, bring up More Data, and Get Specific Data.
- Header – contains information that applies to the entire transaction.
- Panel(s)– display the details for each tab of the transaction.
- Status Bar – displays information about transaction processing. In the status bar there is a messages field which displays messages and the status of the transaction. The transaction statuses in SAM II are:
  - **ACCPT**: Transaction has been accepted by SAM II. A transaction in accepted status has updated the database (inquiries and tables).
  - **REJCT**: Transaction has errors, and has been rejected by SAM II.
  - **DELET**: Transaction has been deleted, and will be removed during nightly processing.
  - **HELD**: Transaction is on hold.
  - **PD AP**: Transaction is awaiting approval(s), or approvals have been applied and the transaction has not yet been updated (accepted).
  - **PD AH**: Transaction was awaiting approval and has been put on hold.



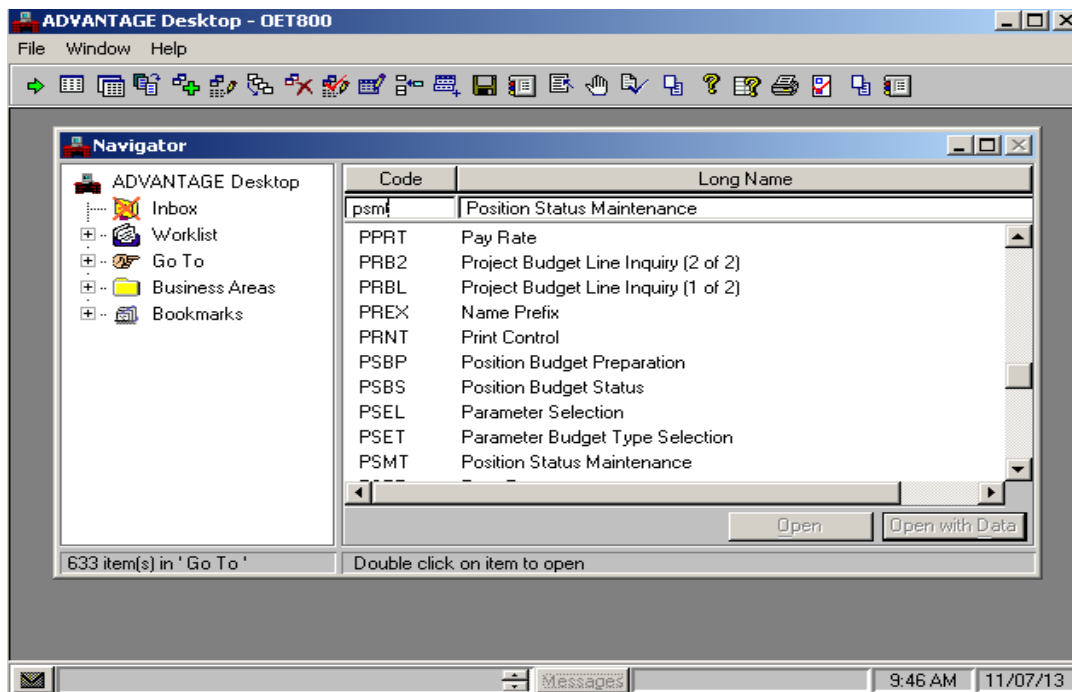
- **RJ HD:** *Transaction was rejected and has been put on hold.*
- **NT PR:** Transaction has not yet been processed, but is on the Suspense File with a transaction ID. This status will appear when the **Process: Update Suspense** command is used.

**Note:** *A transaction in any held status (HELD, PD AH, or RJ HD) must be taken off hold before any further processing can be done.*

Transactions contain numerous types of fields:

- **Date** fields. Data in these fields are entered in a date format. An example of a date field is **EFFECTIVE DATE**.
- **Currency** fields. Data in these fields are in currency format. When entering data in these fields, be sure to enter decimals. For example, if you wanted the **DEDUCTION AMOUNT** field to read \$25.50, you would need to type the two decimal places. For a \$25 deduction, you can enter **25** and the system will add the two decimal places.
- **Display-Only** fields. The data in these fields are supplied by the system or are inferred from data entered elsewhere in the system. An example of a display-only field is **EXPIRATION DATE**. Display-only fields are always shaded.
- **Check Boxes, Radio Buttons, and Drop-down List** fields. These fields are used when you choose from a small list of available choices. Examples of these fields are **ASSIGNMENT TYPE** and **LABOR DISTRIBUTION OVERRIDE OPTION**.

# ACCESSING POSITION STATUS MAINTENANCE (PSMT) TRANSACTION



## POSITION ATTRIBUTES PANEL of PSMT:

The screenshot shows the ADVANTAGE Desktop - OET800 Position Status Maintenance (PSMT) form. The form is divided into several sections. The top section contains fields for Agency, Organization, Position Number, Effective Date, Expiration Date, Short Description, and Long Description. Below this is a tabbed interface with 'Position Attributes' and 'Organization Information' tabs. The 'Position Attributes' tab is active, showing fields for Assignment Type (Permanent, Temporary), Location, Time Class, Union Local, Table Driven Pay (Use Table, Do Not Use Table, Determine by Employee), Payroll Number, Title / Sub-title, Position Status, Budget Prep, Civil Service Status, Pay Class, Title Category, FLSA Status (Exempt, Non-exempt, Not Required), FLSA Profile, Grade, Leave Policy, Salary Minimum, Pay Policy, Deduction Policy, and Salary Maximum. The status bar at the bottom indicates 'Messages', 'Tran ID:', '9:39 AM', and '11/07/13'.

Agency: [ ] Organization: [ ] Position Number: [ ]

Effective Date: [ / / ] Expiration Date: [ / / ]

Short Description: [ ] Long Description: [ ]

**Position Attributes** | **Organization Information**

Assignment Type: ☒ Permanent ☐ Temporary

Location: [ ]

Time Class: [ ]

Union Local: [ ]

Table Driven Pay: ☐ Use Table ☐ Do Not Use Table ☒ Determine by Employee

Payroll Number: [ ]

Title / Sub-title: [ ] / [ ]

Position Status: [ ]

Budget Prep: [ ]

Civil Service Status: [ ]

Pay Class: [ ]

Title Category: [ ]

[Override Profile and Pay](#)

FLSA Status: ☐ Exempt ☐ Non-exempt ☒ Not Required

FLSA Profile: [ ]

Grade: [ ]

Leave Policy: [ ]

Salary Minimum: [ ]

Pay Policy: [ ]

Deduction Policy: [ ]

Salary Maximum: [ ]

# CREATING A TRANSACTION

Let's assume an agency needs to create a new position. The Position Status Maintenance (PSMT) transaction is used to create a new position, change the status of an existing position, and define or change profile attributes of a position.

Let's open the Position Status Maintenance transaction (PSMT) window and add a new position.

**Step 1** Open the Go To window.

**Step 2** In the **CODE** column header, type **PSMT** and click on the **<OPEN>** button.

A blank PSMT screen appears.

**Step 3** Enter the following values in the corresponding fields of the Header. To find out more about each field, use the help features discussed in the previous chapter.

**AGENCY** – Type **375**.

**ORGANIZATION** – Type **1375**.

**POSITION NUMBER** – **SEE STUDENT CARD**.

**EFFECTIVE DATE** – Type **TODAY'S DATE**.

**SHORT DESCRIPTION** – Type **TRAINING**.

**Step 4** Enter the following values in the corresponding fields of the Position Attributes panel:

**ASSIGNMENT TYPE** – Select **PERMANENT**.

**TABLE DRIVEN PAY** – Select **USE TABLE**.

**POSITION STATUS** – Type **ACTVA**.

**CIVIL SERVICE STATUS** – Type **UCPY**.

**LOCATION** – Type **8CI9E2**.

**PAYROLL NUMBER** – Type **A297**.

**PAY CLASS** – Type **HRLY**.

**TITLE/SUB-TITLE** – Type **000627 / J1**.

**Step 5** Enter the following values in the corresponding fields of the Organization Information panel:

**LABOR DISTRIBUTION OVERRIDE OPTION** – Select **USE ENTERED PROFILE**.

**DISTRIBUTION PROFILE** – Type **SAM01**.

# PROCESS MENU ON TRANSACTIONS

**ADVANTAGE Desktop - OET800**

File Edit Display **Process** Window Help

Update F8  
Update Suspense Shift+F8  
Delete F9  
Delete Suspense Shift+F9  
Hold F11  
Take Off Hold Shift+F11  
Approve F12  
Unapprove Shift+F12  
Approve-Update Ctrl+F12  
Approve-Delete Shift+Ctrl+F12  
Undo Ctrl+Z

Position Status  
Agency   
Effective Date   
Short Description   
Position Attributes  
Assignment Type  
☒ Permanent  
☐ Temporary  
Location   
Time Class   
Union Local   
Override Profile and Pay  
FLSA Status  
☐ Exempt  
☐ Non-exempt  
☒ Not Required  
FLSA Profile   
Grade   
Leave Policy   
Salary Minimum   
Payroll Number   
Title / Sub-title  /   
Position Status   
Budget Prep   
Civil Service Status   
Pay Class   
Title Category   
Pay Policy   
Deduction Policy   
Salary Maximum   
Tran ID: 9:48 AM 11/07/13

# APPROVAL PROCESS FOR TRANSACTIONS

The Process Menu is used to perform all transaction processing.

- **Update** – This command performs three actions. First, approvals that have been previously applied (if any) will be removed. Second, the transaction will be edited for errors. Third, if the transaction is error-free, any approvals the user is authorized for will be applied. If the user has the final level of approval, the transaction will be accepted (*ACCPT*).
- **Update Suspense** – This command does not perform any edits. It assigns a transaction ID number and stores the transaction on the related Suspense File in a status of Not Processed (*NT PR*).
- **Delete** – This command deletes accepted (*ACCPT*) transactions. This command can only be used on certain transactions and by certain users. Transactions cannot be deleted if a payroll or other processing has been performed on the transaction.
- **Delete Suspense** – This command deletes transactions that are not accepted and not on hold off of the related Suspense File.
- **Hold** – This will place a transaction that is not ready to be processed on hold. You can retrieve the transaction later and make any changes before processing. Held transactions cannot be processed until taken off hold.
- **Take Off Hold**– This command takes a transaction out of any held status. A transaction must be taken off of hold before any further processing can be done.
- **Approve** – This command applies all approvals a user is authorized for. **Note:** The **Process: Approve** command does not save changes that were made to the transaction since the last **Process: Update** was performed, does not apply any edits to the transaction, and does not update the database (i.e., does not put the transaction in an accepted status (*ACCPT*)).
- **Unapprove** – This command removes any approvals that the user is authorized to apply.
- **Approve-Update** – This command performs the same action as the Process: Approve command, except that after applying approvals, the database is updated if the user has the final level of approval (i.e., the transaction is accepted (*ACCPT*)). Note that this command also does not save changes and does not apply any edits.
- **Approve-Delete** – This command applies authorized approvals to delete an accepted transaction. If the user has the final level of approval, the transaction will be deleted.
- **Undo** – This command backs out the effects of a previously accepted transaction. This command is only available for ESMT transactions **Note:** The **Delete**, **Approve-Delete**, and **Undo** commands can only be used in certain situations by authorized users

# POSITION STATUS MAINTENANCE (PSMT) TRANSACTION

## ERROR MESSAGE WINDOWS:

The screenshot shows the 'ADVANTAGE Desktop - OA125 - [Position Status Maintenance]' window. The 'Messages' sub-window is open, displaying the following data:

Code	Message
H-L2025	INVALID PAYROLL NUMBER

The main window fields are as follows:

Agency	Organization	Position Number
200	1200	2001200

Effective Date	Expiration Date
03 / 20 / 00	99 / 99 / 99

Short Description	Long Description
TRAINING TES	TRAINING TEST

Position Attributes: Assignment Type (Permanent, Temporary), Location (\*001), Time Class, Union Local, FLSA Status (Exempt, Non-Exempt, Not I).

Table Driven Pay: Use Table, Do Not Use Table, Determine by Employee.

Payroll Number: 000000, Title / Sub-title: A00001 / A1.

Position Status: ACTVA, Budget Prep, Civil Service Status: NUCP, Pay Class: CONVE, Title Category.

Override Profile and Pay: FLSA Status (Exempt, Non-Exempt, Not I).

Messages: INVALID PAYROLL NUMBER, Tran ID: 12:05 PM 03/20/00

The screenshot shows the 'ADVANTAGE Desktop - OA125 - [Error Message Explanation]' window. The 'Error Code' is L2025 and the 'Error Message' is INVALID PAYROLL NUMBER. The 'Explanation' text is as follows:

The payroll number specified on this entry is invalid.  
Check the Payroll Number (PYND) table for valid codes  
that are also effective as of the date specified on the  
entry.

Messages: INVALID PAYROLL NUMBER, Tran ID: 12:07 PM 03/20/00

# TRANSACTION APPROVAL PROCESS

You have completed entering the field information for the PSMT and it is time to update and approve the transaction. Remember that the **Process: Update** step checks the transactions for errors.

**Step 5** Select **Process: Update**.

Note that the error message “INVALID PAYROLL NUMBER” appears in the yellow message bar on the status bar at the bottom of the window.

**Step 6** Click on the <MESSAGES> button. Then, double-click on the error message. The Error Message window will appear displaying an explanation about the error. Read it and close the window.

**Step 7** Correct the error by entering the correct Payroll Number, **375**.

**Step 8** Select **Process: Update**.

Once the transaction is free of errors, messages will appear in the yellow message bar at the bottom of the transaction window telling you that some have been applied, while others are still pending. In addition, the system will assign a Transaction ID, which is displayed on the status bar.

The type of transaction and, in some cases, whether or not you are a UCP or Non-UCP agency determines approval levels required for each transaction. Your ability to apply approvals is determined by the security profile that you have been assigned. Also, remember that items will enter and leave your worklist based upon what stage of the editing and approval process the transaction is in, what your security profile allows you to do, and your agency’s workflow rules.

**Step 9** Close the transaction. Workflow will now route the transaction as needed.

**Note:** For training purposes, you will stop at this point. The instructor will complete the next step. However, in the “real world”, you would perform one of the following steps to apply additional levels of approval. Your ability to apply different levels of approval will be determined by your security profile.

# POSITION STATUS MAINTENANCE (PSMT) TRANSACTION

**ADVANTAGE Desktop - OA116 - [Position Status Maintenance]**

File Edit Display Process Window Help

Agency  Organization  Position Number

Effective Date  Expiration Date

Short Description  Long Description

**Position Attributes** **Organization Information**

Assignment Type  
☒ Permanent  
☐ Temporary

Table Driven Pay  
☒ Use Table  
☐ Do Not Use Table  
☐ Determine by Employee

Position Status

Budget Prep

Civil Service Status

Pay Class

Title Category

Location

Time Class

Union Local

Payroll Number

Title / Sub-title  /

**Override Profile and Pay**

FLSA Status  
☐ Exempt  
☐ Non-exempt  
☒ Not Required

FLSA Profile

Grade

Leave Policy

Salary Minimum

Pay Policy

Deduction Policy

Salary Maximum

1 of 7: APPROVAL 1 APPLIED Messages Tran ID:000519006257 1:48 PM 05/19/00



# TRANSACTION APPROVAL PROCESS

Let's continue to complete the approval process of the PSMT.

## Applying Additional but Not Final Approvals

**Step 3** Select **Process: Approve**.

**Step 4** Close the transaction. Workflow will now route the transaction as needed.

OR

## Applying Final Approval

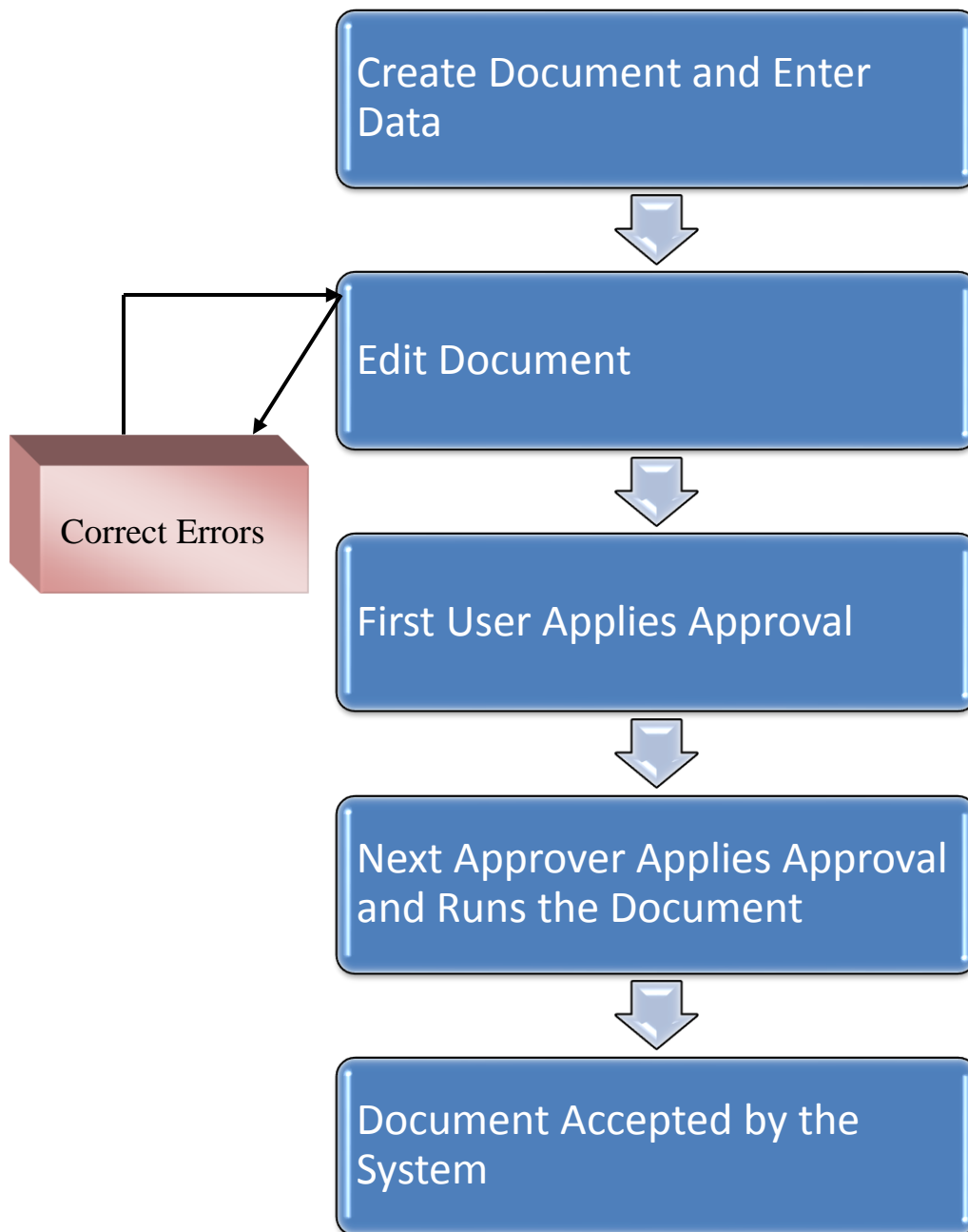
**Step 3** Select **Process: Approve-Update**.

**Step 4** Close the transaction.

## TOPIC 5 - DOCUMENTS

The purpose of this topic is to describe the purpose of documents, familiarize users with the document-processing cycle and learn how to process a document. In SAM II HR, documents are used for recording information about timekeeping activities.

### DOCUMENT PROCESSING CYCLE



# DOCUMENT OVERVIEW

Documents record employee accounting, pay and leave activities. For example, the Current Pay Period Timesheet (CPER) records time data within the current pay period and the Prior Period Timesheet (PPER) records time data from the previous pay period.

The first step in the document processing cycle is to create a document and enter appropriate data. After the information has been entered, the next step is to edit the document for errors. Selecting the **Process: Edit** from the pull-down menus checks for errors in the document. If the system detects any errors, the document will have a rejected status (REJCT). Detail error messages will also be generated. The user corrects errors and edits the document again.

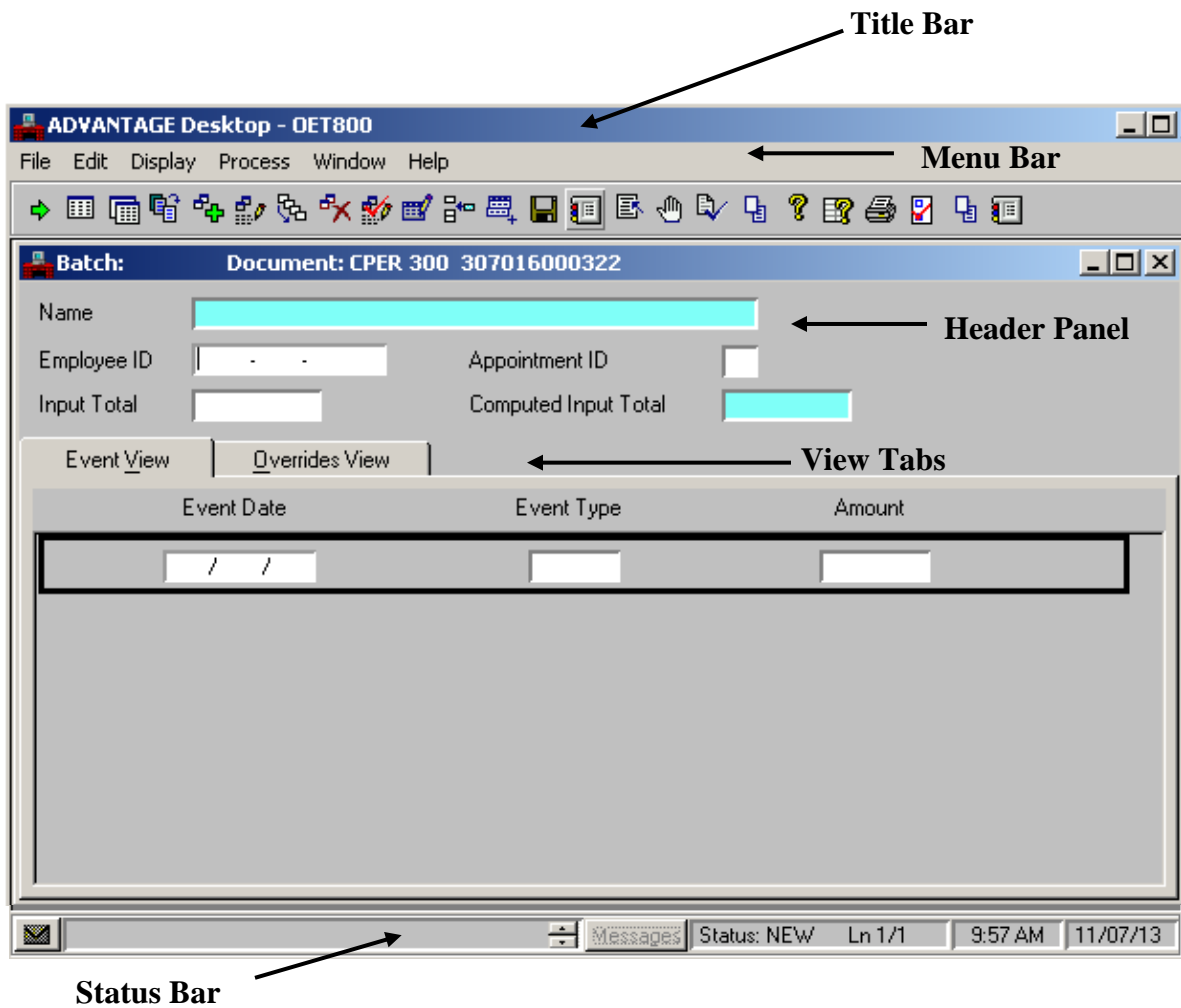
Once the document is error-free, the document will have a pending status (PEND1, for example), which means the document is ready for approvals to be applied. The user applies any authorized approval levels. Based upon how many levels of approvals need to be applied, the document may be routed to the next destination for further approval.

Once the final approver applies approvals, the status of the document will change to scheduled (SCHD) which means the document is ready to be run and accepted by the system. If a document is left with the SCHD status, the document will be automatically picked up and run by the system during the next nightly cycle.

The final approver can also run the document online so that it will be accepted by the system instantaneously. Once the document is run, the status of the document will change to accepted (ACCPT). The accepted document will remain on the Document Listing (SUSF) window for a period of time. During this time period, the accepted document can be reviewed, but not changed.

A document can be put on hold. For example, if the user is in the middle of processing a document and unsure of certain information to enter on the document, a document can be held by selecting **Process: Hold**. This document will be retained on the Document Listing (SUSF) window. Once the user is ready to continue processing the document, this held document may be retrieved from the Document Listing (SUSF).

# CURRENT PERIOD TIMESHEET (CPER) DOCUMENT

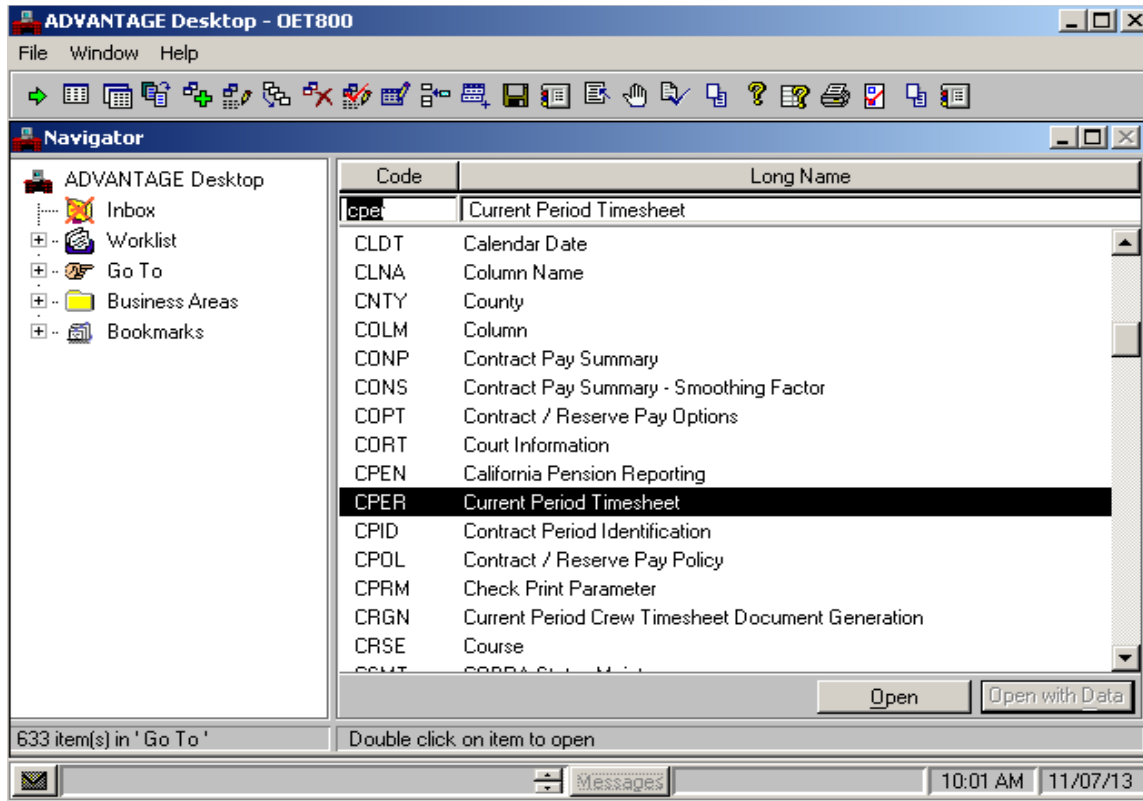


# DOCUMENT OVERVIEW

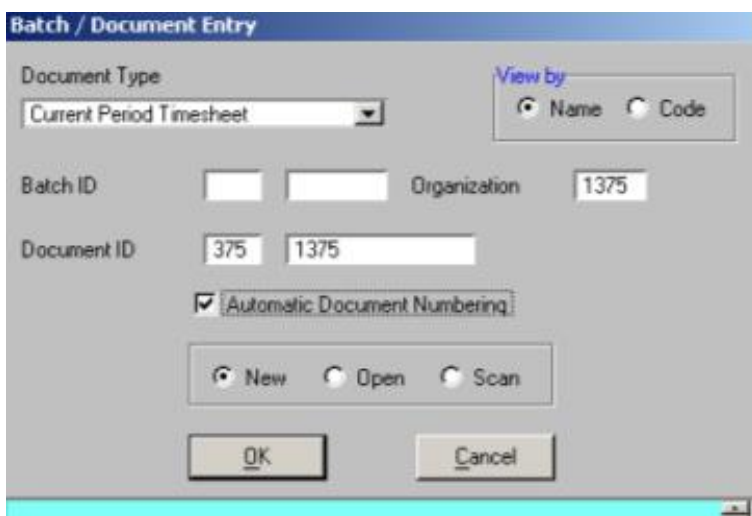
A document window typically contains the following information:

- Title Bar – includes the document ID and the batch ID (if applicable).
- Menu Bar – displays the menu options available for the document. The following menu options are on the menu bar.
  - ◆ The **Edit** menu allows you to make changes specific to the document.
  - ◆ The **Process** menu allows you to edit, run, schedule, approve and unapprove a document. **Process** menu document options are discussed later in this class.
  - ◆ The **Display** menu also appears; however, many of the options are only active if you are creating a batch or using the Document Listing (SUSF).
- Header panel – contains information that applies to the entire document.
- View Tabs – displays the details for each tab of the document.
- Status Bar – displays information about document processing (document status, error message information). In the status bar there is a *Status* field, which displays the status of the document displayed. The most common statuses in SAM II are:
  - ◆ **ACCPT**: Document has been accepted by SAM II. A document does not update any tables until it is in an accepted status.
  - ◆ **REJCT**: Document has errors, and has been rejected by SAM II.
  - ◆ **DELET**: Document has been deleted, and will be removed during nightly processing.
  - ◆ **HELD**: Document is on hold.
  - ◆ **SCHED**: Document is scheduled to process during nightly processing.
  - ◆ **PEND#**: Document is awaiting approval, where # indicates the required level of approval (1, 2, 3, 4, or 5). For example, a document with a status of **PEND3** is awaiting a third level approval.

# ACCESSING CURRENT PERIOD TIMESHEET (CPER) DOCUMENT



## BATCH/DOCUMENT ENTRY WINDOW



# CREATING A DOCUMENT

Let's assume a part-time employee worked 4 hours on one day and 5 hours on the next within the current pay period. This part-time employee's hours worked need to be recorded in order to get paid. The Current Period Timesheet (CPER) document window is used to record time worked and leave taken during the current pay period.

Let's access the Current Period Timesheet (CPER) document.

**Step 9** Open the Go To window.

**Step 10** In the **CODE** column header, type **CPER** and click the **<OPEN>** button.

To create a new Current Period Timesheet (CPER) document, complete the following steps on the **BATCH/DOCUMENT ENTRY** window.

**Step 11** In the **ORGANIZATION** field, type **1375**.

**Step 12** Press the **<TAB>** key until the cursor is in the first section of the **DOCUMENT ID** field and type **375** (agency code).

**Step 13** Type **1375** in the second section of the **DOCUMENT ID** field (prefix).

**Step 14** Select the **AUTOMATIC DOCUMENT NUMBERING** option.

**Step 15** Verify the **DOCUMENT ACTION** option is **NEW** and click **<OK>**.

The blank CPER document opens. Note that the system automatically assigns a document number on the title bar. Write down your document number.

# CREATING A DOCUMENT

Let's complete the required information to process the CPER document.

**Step 1** Enter the following values in the corresponding fields of the Header. To find out more about each field, use the help features discussed in the earlier chapter.

**EMPLOYEE ID – SEE STUDENT CARD.**

**INPUT TOTAL – Type 9.**

**Step 2** Enter the following values in the corresponding fields of the Event View panel:

**EVENT DATE – SEE STUDENT CARD.**

**EVENT TYPE – Type RGLR.**

**AMOUNT – Type 4.**

You still need one more line to record overtime hours for the second day. Let's use the **Edit: Insert Line After** function.

**Step 3** Select **Edit: Insert Line After**. Note that a second line is inserted. Enter information on the second line. Enter the following values on the second line.

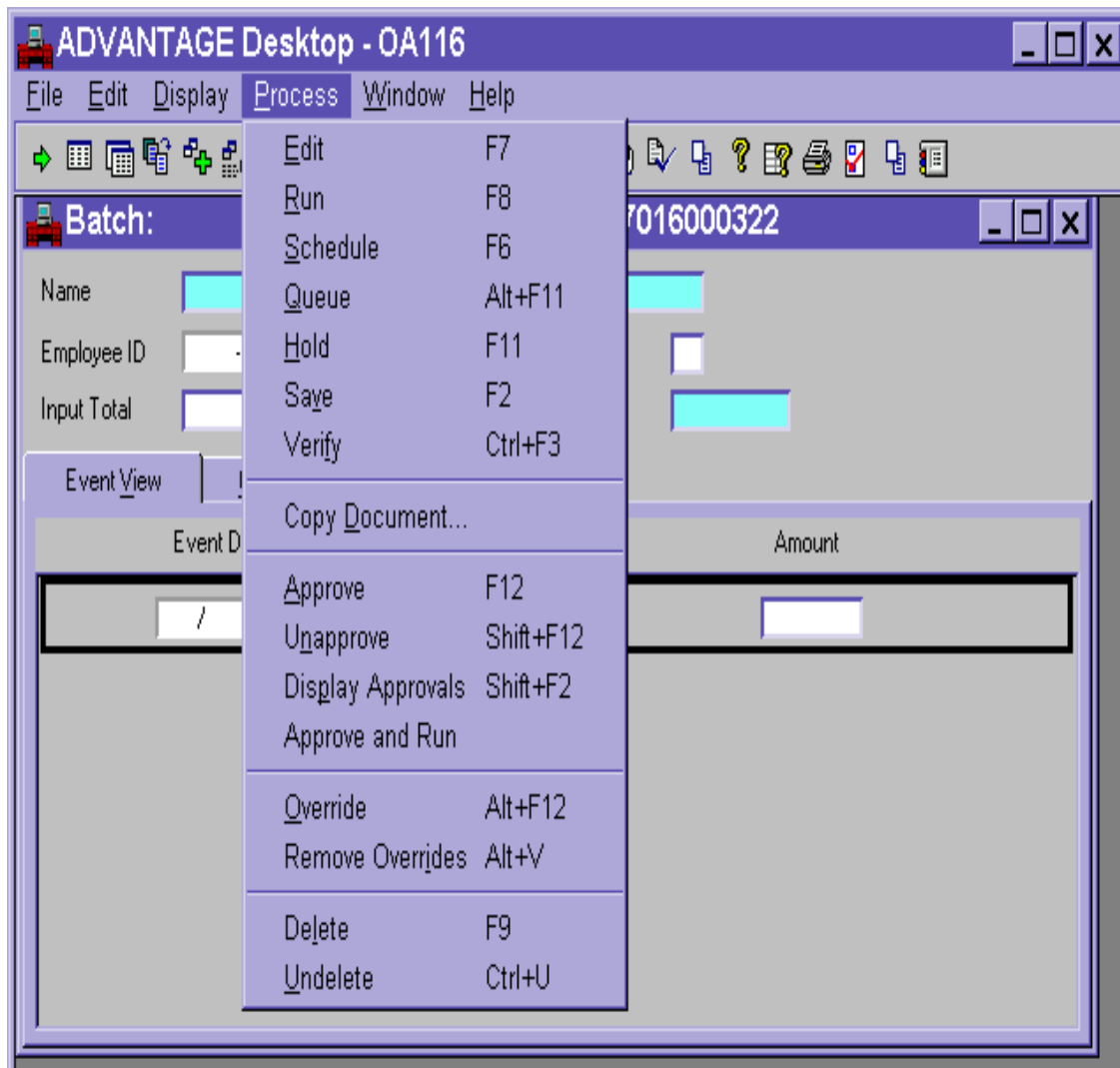
**EVENT DATE – SEE STUDENT CARD.**

**EVENT TYPE – Type RGLR.**

**AMOUNT – Type 5.**



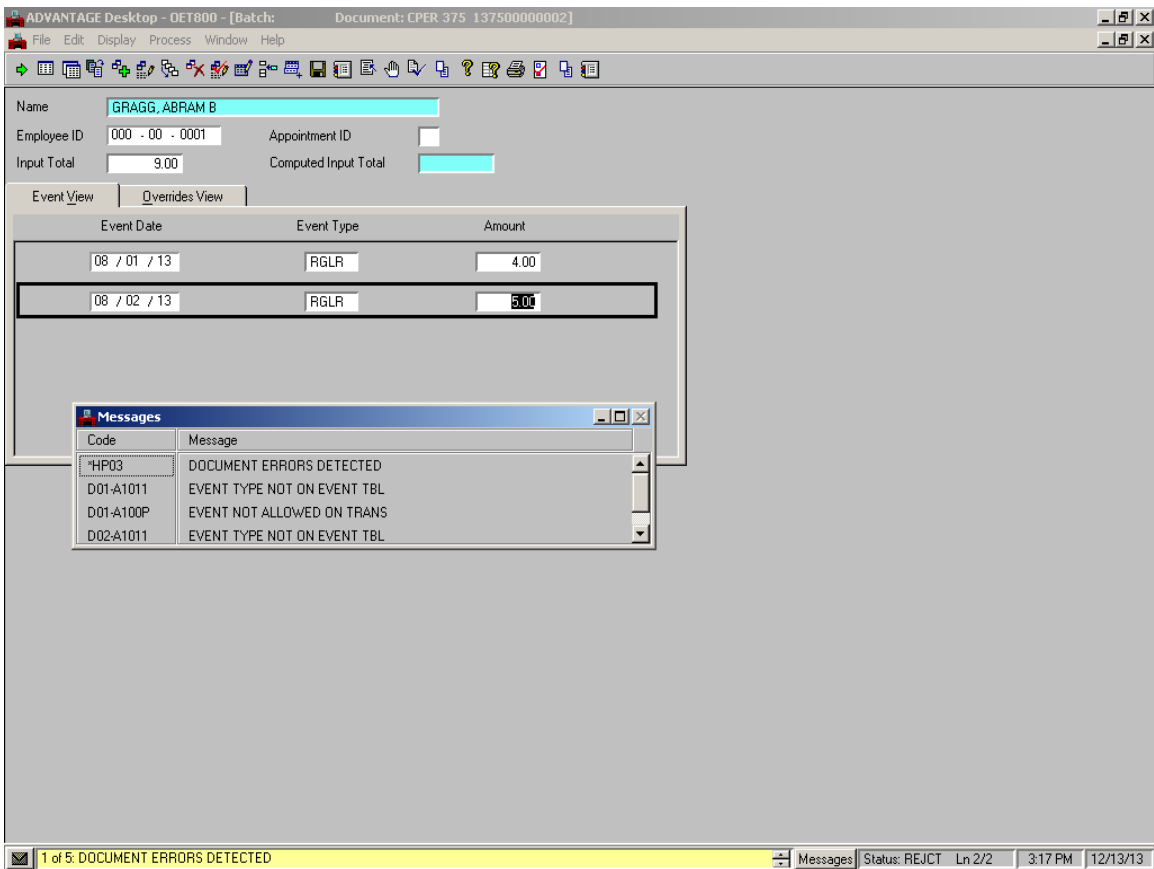
# PROCESS MENU ON DOCUMENTS



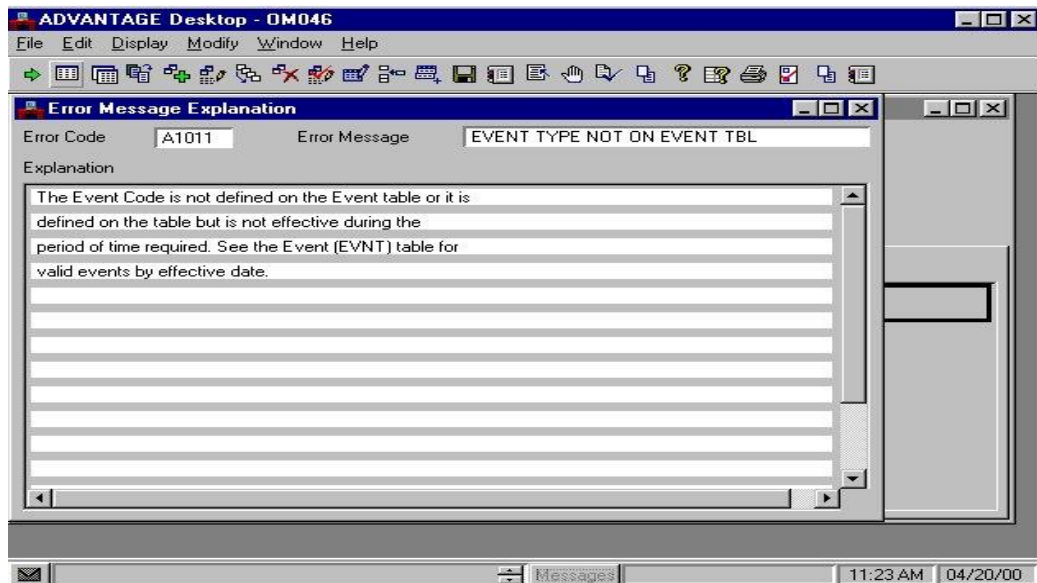
# APPROVAL PROCESS FOR DOCUMENTS

Before completing the approval process of the CPER, let's review some of the Process Menu commands. The Process Menu is used to perform all document processing.

- **Edit** – This will check a document for errors without updating the database. The system saves the document to the Document Listing (SUSF).
- **Run** – This will perform all the same checks as when you choose Process: Edit. However, if the document is error-free and has passed all approvals, the document will be accepted and the database will be updated.
- **Schedule** – This will register your document for processing during the nightly cycle.
- **Queue** - The State of Missouri does not use this option.
- **Hold** – This will place a document that is not ready to be processed on hold (the document is saved to the Document Listing). You can retrieve the document later and make any changes before processing. Held documents are not processed during offline processing.
- **Save** – This will save a document and store it on the Document Listing (SUSF) in a scheduled status.
- **Verify** - The State of Missouri does not use this option.
- **Copy Document** - Open the Copy Document window to create a new document using the selected document as a template.
- **Approve** – This will approve the selected document.
- **Unapprove** - Unapprove the selected batch/document.
- **Display Approvals** - Show the approvals applied to the selected batch/document.
- **Approve and Run** – This combines the approval process and the run process so the user will only have to perform one action. Once the document is run, the status of the document will change to accepted (ACCPT).
- **Override** - Override any override able error messages on the document.
- **Remove Overrides** - Remove any overrides previously applied to the document.
- **Delete** – This will mark the selected document for deletion.
- **Undelete** - Undelete the selected batch/document.



## REJECTED DOCUMENT



# APPROVAL PROCESS FOR DOCUMENTS

You have completed entering the field information for the CPER and it is time to edit and approve the transaction. Remember that the **Process: Edit** step checks the documents for errors. Until you edit the document, the status of the document is **NEW**. The status will change as you complete the document processing cycle.

**Step 4** Select **Process: Edit**.

**Step 5** Note the document is rejected. The error message “1 of 5: Document Errors Detected” appears in the yellow message bar at the bottom of the window. Also, the status of the document is now shown as **REJCT**.

**Step 6** Click on the <**MESSAGES**> button. You can see that we have several errors on the document related to the event. For further explanation, you can double click on any of the error messages. The Error Message Explanation window will appear displaying an explanation about the error. Read the error explanation(s) and correct the errors by changing the **EVENT TYPE** field on both lines to **REGLR**.

**Step 7** Select **Process: Edit**. Once the document is free of errors, a message will appear in the yellow message bar at the bottom of the document window telling you that approvals are ready to be applied. Also, the status of the document will change to **PEND1**.

**Step 8** Select **Process: Approve**.

The type of document and, in some cases, whether you are UCP or Non-UCP, determines approval levels required for each document. Your ability to apply approvals is determined by the security profile that you have been assigned.

The document will move to other worklists based upon the levels of approval that need to be applied and what your security profile permits.

In this class, the document is routed to the instructor’s worklist. The instructor applies approvals by selecting **Process: Approve**. The document is now ready to be run.

For training purposes, you will stop at this point. The instructor will complete the next step. However, in the “real world”, the final approver will perform the following step.

# DOCUMENT READY FOR APPROVAL

ADVANTAGE Desktop - OET800 - [Batch: Document: CPER 375 137500000002]

File Edit Display Process Window Help

Name: GRAGG, ABRAM B

Employee ID: 000 - 00 - 0001 Appointment ID:

Input Total: 9.00 Computed Input Total:

Event View Overrides View

Event Date	Event Type	Amount
08 / 01 / 13	REGLR	4.00
08 / 02 / 13	REGLF	5.00

1 of 5: READY FOR APPROVAL 1 Messages Status: PEND1 Ln 2/2 3:19 PM 12/13/13

Start ADVANTAGE Desktop ... Messages REJECTED & ACCEPTED ... 3:20 PM

# SCHEDULED DOCUMENT

1 of 4: APPROVAL 1 APPLIED Messages Status: SCHED Ln 2/2 2:57 PM 05/01/00

# ACCEPTED DOCUMENT

DOCUMENT ACCEPTED Messages Status: ACCPT Ln 2/2 2:57 PM 05/01/00

# APPROVAL PROCESS FOR DOCUMENTS

Now, the status of the document changes to scheduled (**SCHED**). This means the document is ready to be run and accepted by the system. If a document is left with a scheduled status the document will be automatically picked up and run by the system during the next nightly cycle. Usually, the final approver runs the document by selecting **Process: Run**. This step will enable the document to be instantaneously accepted by the system.

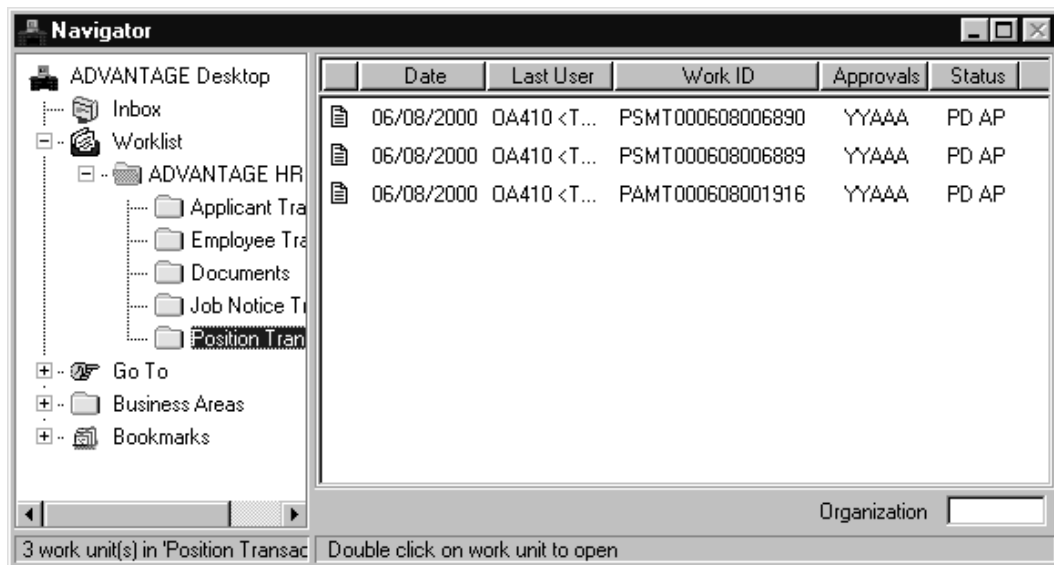
## **Step 3 Select Process: Run.**

After the document has been run, its status changes to “Accepted”. The document will remain on the Document Listing (SUSF) table for a period of time. During this time period, accepted documents can be reviewed, but not changed.

# TOPIC 6 - WORKFLOW

The purpose of this topic is to describe how to access and use your worklist. Other workflow topics such as manual routing and tracking work in progress will also be reviewed.

## WORKFLOW AND THE WORKLIST



# WORKFLOW AND THE WORKLIST

Workflow is a tool provided with SAM II HR to streamline user process flows within the system. Through the use of pre-defined rules and individual user worklists, Workflow provides the ability to automatically route transactions or documents that require approval to the appropriate user.

The worklist is similar to a live “to-do list”. Users may view transactions or documents that have been routed to them and view the status of each transaction or document. A user may open, modify and approve the transactions or documents that have been routed to their worklist. You may also route transactions or documents to a particular user’s worklist using ad-hoc manual routing. Transactions or documents are automatically routed to worklists, based on pre-defined Workflow rules. They are also subject to the defined approval and security edits for each user.

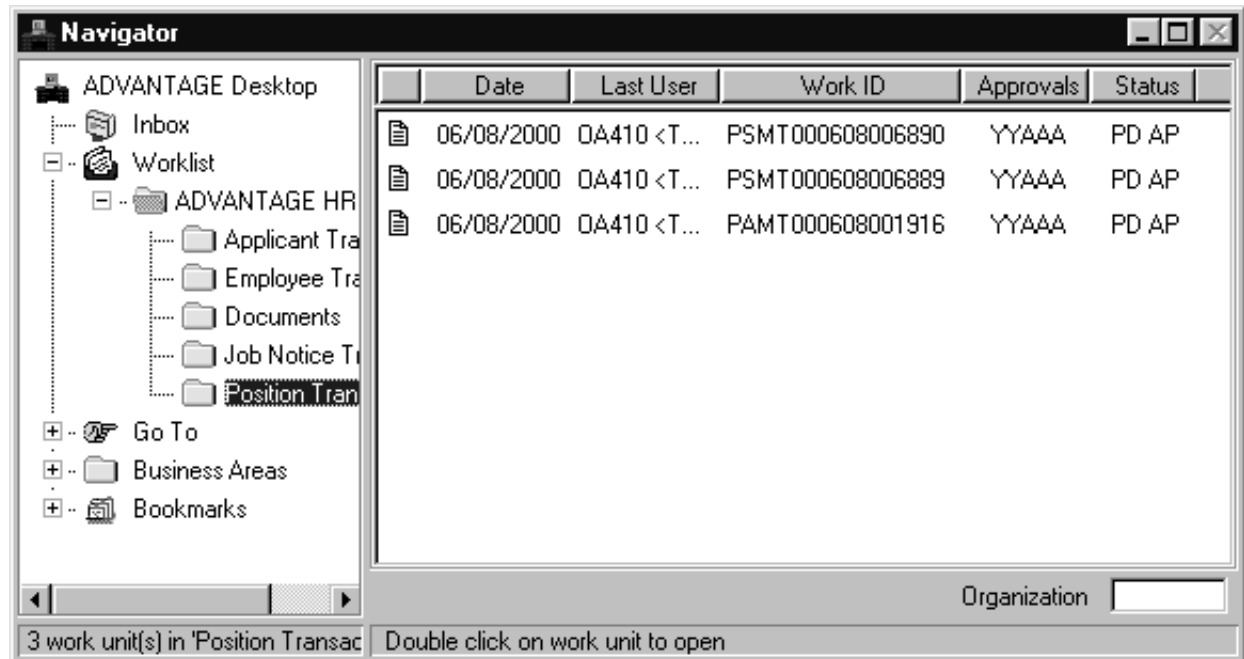
Initial users will normally see transactions or documents on their worklists that are either in progress, contain errors that need correcting, or have been placed on hold. Once a transaction or document is edited and free of errors, it will route to the worklist of the next approver. If a transaction or document does not require approvals, it will be considered complete once it is error free. Once the final level of approval is applied and the transaction or document is accepted it will be purged from all worklists.

In order for a transaction or document to move from one worklist to another, the user must close the transaction or document. This will activate Workflow to route the transaction or document appropriately. For example, you have completed the data entry on a transaction that requires 5 levels of approval. You have the security to enter data and apply the first level of approval. Once you have completed this process, you would close the transaction. Workflow will now route it to the correct worklists for the next level of approval.

Items cannot be deleted off a worklist. Remember, a worklist represents transaction or documents that are in some stage of their processing cycle. To move them from one worklist to another, the appropriate action must be taken.



# ACCESSING YOUR WORKLIST



# ACCESSING YOUR WORKLIST

**Step 1** To access your worklist, click on the Worklist icon in the left panel of the Navigator window.



To narrow down your search, click on the plus sign (+) next to the “ADVANTAGE HR” folder icon, and select a folder within. To open a transaction or document on your worklist, double-click on the line for the transaction or document in the right panel. You may be prompted to enter your organization code. Enter your organization code and click OK.

## TIPS FOR USING WORKFLOW

**Step 2.** A red transaction or document icon in the far-left column of the worklist denotes a high priority item. A blue icon denotes a medium or low priority item.

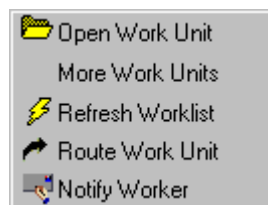
**Step 3.** You can sort on any column in the worklist by clicking on the column header. Click once for an ascending sort or twice for a descending sort.

	Date	Last User	Work ID	Approvals	Status
--	------	-----------	---------	-----------	--------

**Step 4.** Columns can be resized by placing your mouse pointer over the edge of the column header. Click and drag right or left to change the width.

**Step 5.** A transaction or document must be opened before it can be ran or approved.

**Step 6.** Clicking the right mouse button in the worklist window gives you the same menu choices that appear in the Actions: Worklist pull-down menu.



## AD-HOC WORKFLOW (MANUAL ROUTING)

In addition to normal rule-based (automatic) routing of transactions or documents, Workflow offers the option of user-initiated routing and notifications. This functionality is useful both for informational purposes and to facilitate transaction or document processing.

# MANUAL ROUTING

**New Route: PSMT000608006889**

To: ☒ User ID ☐ Last Name

Date: 06/08/00  
Time: 10:43:51 AM  
Priority: Normal   
☐ Notify

Subject:

Message:

**Address Selection**

Selections

Application:  ADVANTAGE HR

Browse by: ☒ User ID ☐ Last Name ☐ Email ID

User ID	Name
0A100	<DAN BRUETTING>
0A104	<LISA MORLEY>
0A110	<KAREN WARDRIP>
0A111	<KARLA WERKMAN>
0A113	<LESLIE JOHNSTONE>
0A116	<SHONDRA MERRITT>
0A121	<DAWNA CAPE>

Recipients:

# MANUAL ROUTING

SAM II HR also offers the option of manually routing a transaction or document. If you have authorization, you may send any transaction or document in your worklist to someone else's worklist. The transaction or document will remain on both worklists until the status of the transaction or document is changed. If the transaction or document is changed, Workflow rules will be applied as soon as it is closed. The transaction or document will then be removed from both worklists and forwarded to the appropriate individual(s).

To manually route a transaction or document, follow the steps below:

**Step 7.** Highlight the transaction or document you wish to route by right-clicking on it in your worklist.

**Step 8.** Select **Route Work Unit** from the menu that appears.

The New Route window will appear. Note that the ID of the transaction or document is displayed in the title bar of the window.

**Step 9.** Click on the **<ADDRESS>** button to choose whom to send the message to. The Address Selection window appears.

**Step 10.** You may browse the list of choices on the left by User ID, Last Name, or Email ID, depending on which radio button you select.

**Step 11.** Use the **<BROWSE>** and **<MORE DATA>** buttons and the scroll bar to locate the user(s) you wish to send the message to.

**Step 12.** To select a user, highlight the user's entry and click the **<ADD>** button. The user will be added to the Recipients list on the right. You may use the **<REMOVE>** and **<REMOVE ALL>** buttons to remove users you have previously selected.

**Step 13.** When you have finished adding recipients, click the **<OK>** button to return to the New Message window.

**Step 14.** From here, you may change the Priority using the drop-down list.

**Step 15.** (Optional) If you wish to attach a text email message to the transaction or document, check the Notify check box.

**Note:** The Notify option will only work if the user being notified is set up with email. In addition, although the Work Unit will appear on the recipient's worklist immediately, the email message may not appear in the recipient's inbox until later.

**Step 16.** Click the **<SEND>** button to send the transaction or document.

**NOTE:** The copy of the transaction or document that you manually route can be worked on by the recipient only if they have update authority for that particular transaction or document.

# TRACKING WORK IN PROGRESS (TWIP)

**Work Unit Status**

Work TypePSMTAgencyIdentifier000608006889

ProcessPSMTCurrent StageMAIN

Initial UserOA410Current StatusPD APApproval StatusYYAAA

Last Route

Rule NameMCCARTY1Assigned On06/08/2000 - 09:36:43:30

Assigned ToMCCARTY1

Summary

☐ NotificationsRefreshClose

Stage	Rule Name	R/N	Destination	Assigned	Completed
▼ MAIN				06/08/2000	In Progress
	MCCARTY1	↷	MCCARTY1	06/08/2000	In Progress

# TRACKING WORK IN PROGRESS (TWIP)

SAM II HR will allow authorized users to check on the status of a transaction or document. Users who have the transaction or document ID and required security will be able to view information about the transaction or document. More detailed logging of activity will be available to the Workflow System Administrators. TWIP shows Workflow history but does not show who has opened, who has edited, or who has approved a transaction or document.

To track work in progress, follow the steps below:

- Step 17.** Using the **Go To** window, open the Batch/Transaction or document Entry window for the transaction or document type you wish to track.
- Step 18.** Enter the agency, organization, and transaction or document ID in the **TRANSACTION OR DOCUMENT ID** field and click on the **<OPEN>** radio button.
- Step 19.** Click **<OK>** to open the transaction or document.
- Step 20.** Select **Edit: Track Work in Progress** from the pull-down menus. The Work Unit Status window opens.

**Header Information:** The header has several fields that contain information pertaining to the transaction or document and its last rule-based route. It will list the Work Type (transaction or document type), submitting Agency, Identifier (transaction or document ID), Current Status, Approval Status and Last Route information, including when it was last routed and to whom it has been assigned. It will also give Workflow-specific information that is helpful for administration of Workflow, such as the Current Stage and Rule Name that was responsible for the last route.

**Detail Information:** This section will give details on all the activity of the transaction or document. It will list the Workflow Stage and Rule Name followed by an arrow symbol for Route or an envelope symbol for Notify, the Destination, date and status.

Clicking the Summary button will display header information only. Checking the Notifications check box will display notification details. The Refresh button refreshes the screen. The Close button closes the Work Unit Status window and returns you to the transaction or document.

# TOPIC 7 – SUSPENSE FILES

This topic describes the use of suspense files in the processing of transactions and documents. How to find, narrow a search, determining the status and accessing transactions or documents will be reviewed.

ADVANTAGE Desktop - OET800 - [Document Listing]

File Edit Display Process Window Help

Batch ID: [ ] Document ID: [ ] Organization Status: 1375 Process Date: [ ]

Doc Type: CPER Doc Agency: 375 Doc Number: TRAINCPER1 Status: REJECT Approvals: 00000 Last Date: 12 04 13 Last User: OET8 Process Date: [ ]

Batch Type	Batch Agency	Batch Number	Doc Type	Doc Agency	Doc Number	Status	Approvals	Last Date	Last User	Process Date
CPER	375	TRAINCPER1	REJECT	00000	12 04 13	OET8				
CPER	375	13750000001	PEND3	YYA00	12 13 13	OET8				

New ... Open Browse More Data Refresh New Selection ... Clear Selection

Message 1:31 PM 12/13/13

ADVANTAGE Desktop - OET800 - [Position Transaction Listing]

File Edit Display Window Help

Search: Tran Type: PSMT Agency: 375 Organization: 1375 Position Number / FY: [ ] Transaction ID: [ ]

Tran Type	Agency	Orgn	Position Number / FY	Transaction ID	Status	Action	Approvals	Entry Date	Last Date
PSMT	375	1375	0000001	103013284081	ACCP	U	YYYY	10 30 13	10
PSMT	375	1375	0000002	103013445371	ACCP	U	YYYY	10 30 13	10
PSMT	375	1375	0000003	103116402617	ACCP	U	YYYY	10 31 13	10
PSMT	375	1375	0000004	103116411858	ACCP	U	YYYY	10 31 13	10
PSMT	375	1375	0000005	110416485267	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000006	112109402713	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000007	110416502700	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000008	112109491170	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000009	110416520917	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000010	112109502684	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000011	110416524560	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000012	112109511200	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000013	110416531483	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000014	112109523164	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000015	110416534814	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000016	112109532315	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000017	110416542106	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000018	112109542210	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000019	110416562346	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000020	112109550874	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000021	112109460637	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000022	112109575095	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000023	112109470390	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000024	112109592081	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000030	120413164781	PD AP	U	YAAA	12 04 13	12
PSMT	375	1375	0000030	121313271989	PD AP	U	YAAA	12 13 13	12
PSMT	375	1375	0000031	120414040846	PD AP	U	YAAA	12 04 13	12

Browse More Data Refresh Open ... New Selection ... Clear Selection

Message 1:32 PM 12/13/13

# SUSPENSE FILES

The Suspense Files provide a record of all transactions and documents that are waiting to be processed in SAM II HR. You can access the Suspense Files that contain the specific information you need. For example, if you wanted to look up information about a specific Current Period Time Sheet (CPER), you would access the Document Listing (SUSF). However, if you wanted to get information about a Position Status Maintenance transaction, you would access the Position Transaction Listing (SUSP).

Suspense Files contain all documents that are awaiting final processing regardless of their status. For example, documents that are awaiting error correction, needing approvals to be applied, on hold, or awaiting processing by the next appropriate nightly system cycle will all be contained on a Suspense File.

Suspense Files provide an alternative way of accessing transactions and documents without using Workflow. If you want to see how many Position Authorizations are in progress for your agency or if you need help approving transactions because someone is out sick, the Suspense Files provide methods for you to do this.

Accepted transactions will remain on the specific Suspense File for a period of time. While Suspense Files vary slightly depending upon what you are specifically accessing, some common features include:

- **BROWSE** – Views transactions remaining on the Position.
- **REFRESH** – Displays the current entries again (to see if a transaction status has changed).
- **OPEN** – Opens transactions.
- **NEW SELECTION** – Opens the Transaction Selection window, where you can specify the attributes of the documents to be displayed.



# SUSPENSE FILES

The number of approval levels required and their current status will be displayed in the Approvals field on both the Suspense File as well as Workflow work list. The Approvals field has five characters, each representing one of the five available approval levels. The following explains the meaning of the various values you will see in the Approvals field for documents.

- 0 - The approval level is not required, or the document is not yet ready for approval.
- A - The approval level is required and has not been applied (still pending).
- Y - The approval level is required and has been applied.

Below are some examples of what you might see in the *Approvals* field, along with their meanings and possible document statuses.

- 00000 - No approvals required, or document is not yet ready for approval. Status: *SCHED*, *REJCT*, or *ACCPT*.
- AA000 - Document requires two levels of approval. Neither has been applied. Status: *PEND1*.
- YAA00 - Document requires three levels of approval. Level 1 has been applied. Status: *PEND2*.

ADVANTAGE Desktop - OET800 - [Position Transaction Listing]

File Edit Display Window Help

Search

Tran Type Agency Organization Position Number / FY Transaction ID

PSMT 375 1375

Tran Type	Agency	Orgn	Position Number / FY	Transaction ID	Status	Action	Approvals	Entry Date	La: Da
PSMT	375	1375	0000001	103013284081	ACCPT	U	YYYYY	10 30 13	10
PSMT	375	1375	0000002	103013445371	ACCPT	U	YYYYY	10 30 13	10
PSMT	375	1375	0000003	103116402617	ACCPT	U	YYYYY	10 31 13	10
PSMT	375	1375	0000004	103116411858	ACCPT	U	YYYYY	10 31 13	10
PSMT	375	1375	0000005	110416485267	ACCPT	U	YYYYY	11 04 13	11
PSMT	375	1375	0000006	112109402713	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000007	110416502700	ACCPT	U	YYYYY	11 04 13	11
PSMT	375	1375	0000008	112109491170	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000009	110416520917	ACCPT	U	YYYYY	11 04 13	11
PSMT	375	1375	0000010	112109502684	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000011	110416524560	ACCPT	U	YYYYY	11 04 13	11
PSMT	375	1375	0000012	112109511200	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000013	110416531483	ACCPT	U	YYYYY	11 04 13	11
PSMT	375	1375	0000014	112109523164	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000015	110416534814	ACCPT	U	YYYYY	11 04 13	11
PSMT	375	1375	0000016	112109532316	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000017	110416542106	ACCPT	U	YYYYY	11 04 13	11
PSMT	375	1375	0000018	112109542210	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000019	110416562946	ACCPT	U	YYYYY	11 04 13	11
PSMT	375	1375	0000020	112109550874	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000021	112109460637	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000022	112109575095	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000023	112109470390	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000024	112109592081	ACCPT	U	YYYYY	11 21 13	11
PSMT	375	1375	0000030	120413164781	PD AP	U	YYAAA	12 04 13	12
PSMT	375	1375	0000030	121313271989	PD AP	U	YYAAA	12 13 13	12
PSMT	375	1375	0000031	120414040846	PD AP	U	YYAAA	12 04 13	12

Browse More Data Refresh Open ... New Selection ... Clear Selection

# SUSPENSE FILES

Now let's review the approval levels for transactions. The following explains the meaning of the various values you will see in the *Approvals* field on the transaction suspense files.

- **Blank** - The approval level is not required, or the transaction is not yet ready for approval.
- **A** - The approval level is required and has not been applied (still pending).
- **Y** - The approval level is required and has been applied.

Below are some examples of what you might see in the *Approvals* field, along with their meanings and possible transaction statuses.

- **Blank** - No approvals required, or transaction is not yet ready for approval. Status: *REJECT, ACCPT, HELD*.
- **AA** - Transaction requires two levels of approval. Neither has been applied. Status: *PD AP*.
- **YAA** - Transaction requires three levels of approval. Level 1 has been applied. Status: *PD AP*.
- **YY A** - Transaction requires three levels of approval. Approvals 1 and 2 have been applied. Approval level 4 is still pending. Status: *PD AP*.

Users may have one or multiple levels of approval. If a user with multiple approval levels applies an approval to a transaction, all the approval levels that user holds are applied. For example, if a transaction requires 3 levels of approval (**AAA—PD AP**), and a user authorized for levels 1 and 2 applies approval to the transaction, the transaction will stay in a **PD AP** status (**YYA**).

# DOCUMENT LISTING (SUSF)

Let's access the SUSF file and find a CPER.

**Step 1** Open the **Go To** window.

**Step 2** In the **CODE** field, type **SUSF** and press the **<OPEN>** button. The Document Listing (SUSF) screen appears.

You will notice that documents appear in alphabetical order and then by organization. Let's review the following fields and how they can be used to narrow your search.

**Step 3** Enter the following values:

**ORGANIZATION** -- Conditional. Enter the organization to be associated with the document you wish to create or open, if required for your security profile. **Type 1375**

**DOCUMENT ID** -- Optional. You may specify the first document ID to be listed by specifying a document ID. The first field represents the document type, the second is the agency, and the third is the document number. **Type "CPER" in the first field. Type 375 in the second field.**

The USER ID field on the SUSF also makes possible an easy identification of your document.

**Step 4** Click on the **<BROWSE>** button at the bottom of the screen.  
**Your CPER document will appear.**

Batch Type	Batch Agency	Batch Number	Doc Type	Doc Agency	Doc Number	Status	Approvals	Last Date	Last User	Process Date
CPER	375	TRAINCPER1	REJCT	00000	12 04 13	OET8				
CPER	375	137500000001	PEND3	YYA00	12 13 13	OET8				

# DOCUMENT LISTING (SUSF)

**Step 5** Let's review the fields in the header section.

**ORGANIZATION** -- Conditional. Enter the organization to be associated with the document you wish to create or open, if required for your security profile.

**BATCH ID** -- Optional. You may specify a batch to be listed by specifying a batch ID.

**DOCUMENT ID** -- Optional. You may specify the first document ID to be listed by specifying a document ID.

**STATUS** -- Optional. You may limit the list of documents by specifying a document status. If no value is entered, documents with all statuses will be displayed

**PROCESS DATE** -- Optional. You may limit the list of documents by specifying a process date. Only documents with the process date you entered will be displayed

**Step 6** Let's review the fields in the list area section.

**BATCH TYPE** -- Inferred. The transaction code used to identify the batch is displayed

**BATCH AGENCY** -- Inferred. The agency to which the batch belongs is displayed

**BATCH NUMBER** -- Inferred. Unique identifier for the record that the system can easily access and refer to during processing and future queries

**DOC TYPE** -- Inferred. The code used to identify the document type is displayed.

**DOC AGENCY** -- Inferred. The agency of the document is displayed

**DOC NUMBER** -- Inferred. The number of the document is displayed.

**Step 7:** Let's continue to review the fields in the list area section.

**STATUS** - Inferred. The status of the suspended document is displayed

**APPROVALS** -- Inferred. The required approval levels and statuses of the document are displayed.

**LAST DATE** -- Inferred. The last date that the document was updated is displayed

**LAST USER** -- Inferred. The identification number of the last user to update the document is displayed

**PROCESS DATE** -- Optional. Only used for certain events that are discussed in Topic 7 of the Time and Leave training manual.

## DOCUMENT LISTING (SUSF): Using the Document Selection Window

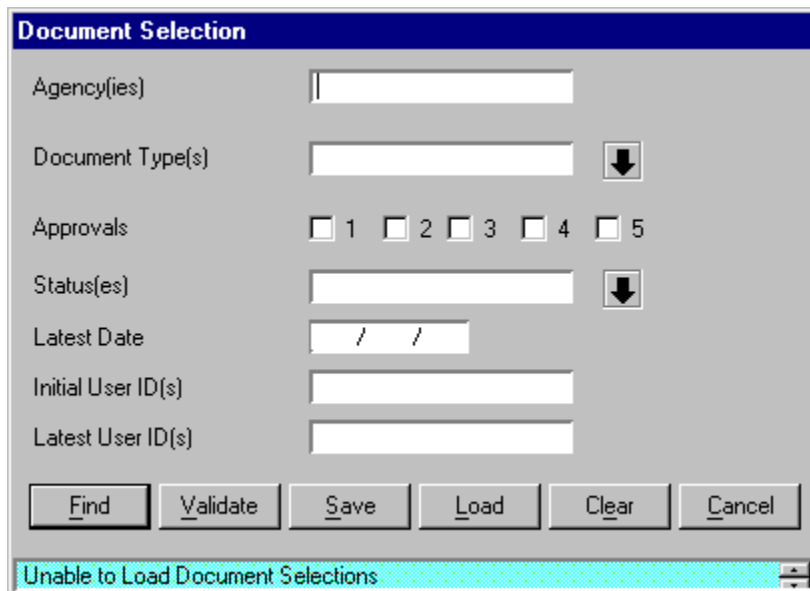
The Document Selection window provides another way to find and open documents on the Document Listing (SUSF). Using Document Selection, you can specify search criteria to find certain types of documents. For example, you could use Document Selection to find only Current Period Timesheets (CPER) for your agency with a status of **HELD**.

Document Selection offers more detailed search criteria than just browsing for a partial document ID from SUSF. This is useful because it allows you to selectively list only a few documents from a potentially large list of documents.

It is quite possible that you will have a “usual” set of selection criteria, depending upon your job role. For example, every morning you might want to list a set of documents pending your approval. Document Selection provides a feature to specify this selection criteria (or “profile”), save it, change it and use it for displaying documents in the future.

**Step 8.** To open the Document Selection window, click on the **New Selection** button from the Document Listing.







The window opens for you to enter the search criteria.



The screenshot shows a window titled "Document Selection" with a blue header bar. The window contains several input fields and buttons. The fields are: "Agency(ies)" with a text box; "Document Type(s)" with a text box and a downward arrow button; "Approvals" with five checkboxes labeled 1, 2, 3, 4, and 5; "Status(es)" with a text box and a downward arrow button; "Latest Date" with a text box containing slashes; "Initial User ID(s)" with a text box; and "Latest User ID(s)" with a text box. At the bottom, there are six buttons: "Find", "Validate", "Save", "Load", "Clear", and "Cancel". A status bar at the very bottom of the window displays the message "Unable to Load Document Selections" in a red font.

# DOCUMENT LISTING (SUSF): Using the Document Selection Window


Let's review the options on the Document Selection Window.

Use....	To....
	Return to the Document Listing (SUSF) and Inferred those documents that meet the criteria specified in the Document Selection window.
	Validate the values specified in the Document Selection window. If there are errors (an invalid User ID, for example), they will be displayed on the status bar. *
	Save your Document Selection criteria. Saved criteria can be loaded later.
	Load previously saved Document Selection criteria.
	Clear the values currently entered in the Document Selection window.
	Return to the Document Listing (SUSF) without using any selection criteria.

\*Validation of values entered is not required.

Now, let's use the Document Selection Window to search on SUSF.

**Step 9.** You can use the *Agency(ies)* field to specify a single agency or multiple agencies where the documents have been created. If you are entering more than one agency, separate each agency code with a semicolon. For our example, type **375** in the *Agency(ies)* field.

**Step 10.** To choose specific types of documents to view, click on the arrow next to the *Document Type(s)* field. 

The Select Choices window opens, listing all available document types.

## DOCUMENT LISTING (SUSF): Using the Document Selection Window

- Step 11.** Click on the **Code** radio button to view the list of available choices by document code.
- Step 12.** Scroll through the list on the left until you find **CPER**. Click on the value to highlight it and click the **Add** button.

*CPER* will be displayed in the *Selected Choices* list on the right side of the window.

**Note:** To select all of the documents, use the **Add All** button. To remove a document from the *Selected Choices* list, highlight the document and click the **Remove** button. To remove all of the selected documents, use the **Remove All** button.

- Step 13.** Click on the **OK** button to return to the Document Selection window. Your document values are displayed in the *Document Type(s)* field, separated by semicolons.

You may also use the following criteria if desired:

- Step 14.** *Statuses*—Use this field to specify documents in a certain status.
- Step 15.** *Approvals*—Use these checkboxes to specify documents pending certain approval levels.
- Step 16.** *Latest Date*—Use this field to enter a date on which desired documents were last processed.
- Step 17.** *Initial User ID(s)*—Use this field to specify documents initiated by a particular user or users. Separate multiple user IDs with a semicolon.
- Step 18.** *Latest User ID(s)*—Use this field to specify documents last processed by a particular user or users. Separate multiple user IDs with a semicolon.
- Step 19.** Click on the **Find** button. The Document Listing appears, displaying only the documents that meet the criteria you specified.

Now, let's review the Position Transaction Listing (SUSP) window.

# POSITION TRANSACTION LISTING (SUSP)

The Position Transaction Listing (SUSP) window contains information on transactions related to Position Control that are in process. There are Suspense Files for the different functional areas within SAM II HR/Payroll.

**Step 1** Open the **Go To** window.

**Step 2** In the **CODE** field, type **SUSP** and click the **<OPEN>** button. The Position Transaction Listing (SUSP) screen appears.

You will notice that transactions specific to Position Control are displayed in alphabetical order by transaction type and then by agency number. You can narrow your search by entering values in header fields.

**Step 3** Enter the following value:

**TRAN TYPE – Type PSMT**

**AGENCY – Type 375**

**ORGANIZATION – Type 1375**

**Step 4** Click on the **<BROWSE>** button at the bottom of the screen.

**Step 5** The PSMT transaction you are looking for will appear. Double-click on it to open it.

**Step 6** Close the PSMT.

Tran Type	Agency	Orgn	Position Number / FY	Transaction ID	Status	Action	Approvals	Entry Date	Last Date
PSMT	375	1375	0000001	103013284081	ACCP	U	YYYY	10 30 13	10
PSMT	375	1375	0000002	103013445371	ACCP	U	YYYY	10 30 13	10
PSMT	375	1375	0000003	103116402617	ACCP	U	YYYY	10 31 13	10
PSMT	375	1375	0000004	103116411858	ACCP	U	YYYY	10 31 13	10
PSMT	375	1375	0000005	110416485267	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000006	112109402713	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000007	110416502700	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000008	112109491170	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000009	110416520917	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000010	112109502684	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000011	110416524560	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000012	112109511200	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000013	110416531483	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000014	112109523164	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000015	110416534814	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000016	112109532316	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000017	110416542106	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000018	112109542210	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000019	110416562946	ACCP	U	YYYY	11 04 13	11
PSMT	375	1375	0000020	112109550874	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000021	112109460637	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000022	112109575095	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000023	112109470390	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000024	112109532081	ACCP	U	YYYY	11 21 13	11
PSMT	375	1375	0000030	120413164781	PD AP	U	YAAA	12 04 13	12
PSMT	375	1375	0000030	121313271989	PD AP	U	YAAA	12 13 13	12
PSMT	375	1375	0000031	120414040846	PD AP	U	YAAA	12 04 13	12



# DOCUMENT LISTING (SUSE)

Let's access the SUSE file and find all ESMT's on the suspense file for agency 010.

**Step 7** Open the **Go To** window.

**Step 8** In the **CODE** field, type **SUSE** and press the **<OPEN>** button. The Document Listing (SUSF) screen appears.

You will notice that documents appear in alphabetical order and then by organization. Let's review the following fields and how they can be used to narrow your search.

**Step 9** Enter the following values:

**ORGANIZATION** -- Conditional. Enter the organization to be associated with the document you wish to create or open, if required for your security profile. **Type 1375**

**DOCUMENT ID** -- Optional. You may specify the first document ID to be listed by specifying a document ID. The first field represents the document type, the second is the agency, and the third is the document number. **Type "CPER" in the first field. Type "375" in the second field.**

The USER ID field on the SUSF also makes possible an easy identification of your document.

**Step 10** Click on the **<BROWSE>** button at the bottom of the screen.

Tran Type	Employee ID	Appt ID	Transaction ID	Home Agency	Status	Action	Approvals	Entry Date
ESMT	000 00 0001		103115103749	375	ACCP	U	YYYY	10 31 13
ESMT	000 00 0002		103116272075	375	ACCP	U	YYYY	10 31 13
ESMT	000 00 0003		103116470905	375	ACCP	U	YYYY	10 31 13
ESMT	000 00 0004		110416381535	375	ACCP	U	YYYY	11 04 13
ESMT	000 00 0005		112109335692	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0006		112110324008	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0007		112110384436	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0008		112110472803	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0009		112110523066	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0010		112110572367	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0011		112111010324	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0012		112111043119	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0015		112111140214	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0016		112111171407	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0017		112111200671	375	ACCP	U	YYYY	11 21 13
ESMT	000 00 0018		112111225565	375	ACCP	U	YYYY	11 21 13
ESMT	000 01 0000		103115254338	375	ACCP	U	YYYY	10 31 13
ESMT	000 02 0000		103116322268	375	ACCP	U	YYYY	10 31 13
ESMT	000 03 0000		103116484142	375	ACCP	U	YYYY	10 31 13
ESMT	000 04 0000		110416421772	375	ACCP	U	YYYY	11 04 13
ESMT	000 05 0000		112109355731	375	ACCP	U	YYYY	11 21 13
ESMT	000 06 0000		112110341925	375	ACCP	U	YYYY	11 21 13
ESMT	000 07 0000		112110415820	375	ACCP	U	YYYY	11 21 13
ESMT	000 08 0000		112110491912	375	ACCP	U	YYYY	11 21 13
ESMT	000 09 0000		112110545719	375	ACCP	U	YYYY	11 21 13
ESMT	000 10 0000		112110582492	375	ACCP	U	YYYY	11 21 13
ESMT	000 11 0000		112111022189	375	ACCP	U	YYYY	11 21 13
ESMT	000 12 0000		112111060286	375	ACCP	U	YYYY	11 21 13
ESMT	000 13 0000		112111081997	375	ACCP	U	YYYY	11 21 13
ESMT	000 14 0000		112111113692	375	ACCP	U	YYYY	11 21 13

*Access the SUSE window and use the New Selection feature to find all ESMT's on the suspense file for agency 375.*

## TOPIC 8 - INQUIRIES

The purpose of this topic is to describe the purpose of inquiries, understand how inquiry windows get updated and learn how to access HR/Payroll information using inquiries. SAM II HR inquiries provide users with access to reporting information stored in the application database.

### INQUIRY OVERVIEW

Inquiry windows allow online viewing of HR/Payroll information. Some inquiries contain cross-reference information taken from several windows. This allows users to see highlights or information pertaining to a specific topic without having to open additional windows. For example, if you do not know a title code for a particular position, you can look it up in a table.

Moreover, inquiries provide information used for management reporting. Inquiry windows are automatically updated with data as a result of transaction or document processing. Users cannot change inquiry windows since the purpose of inquiries is to provide reference information for online viewing of current data by system users.

Some examples of inquiry windows are:

- Employee Roster by Employee Name (QXRF)
- Position Roster (QPSR)
- Issued Checks/Advices (QISS)
- Employment Verification (QVER)

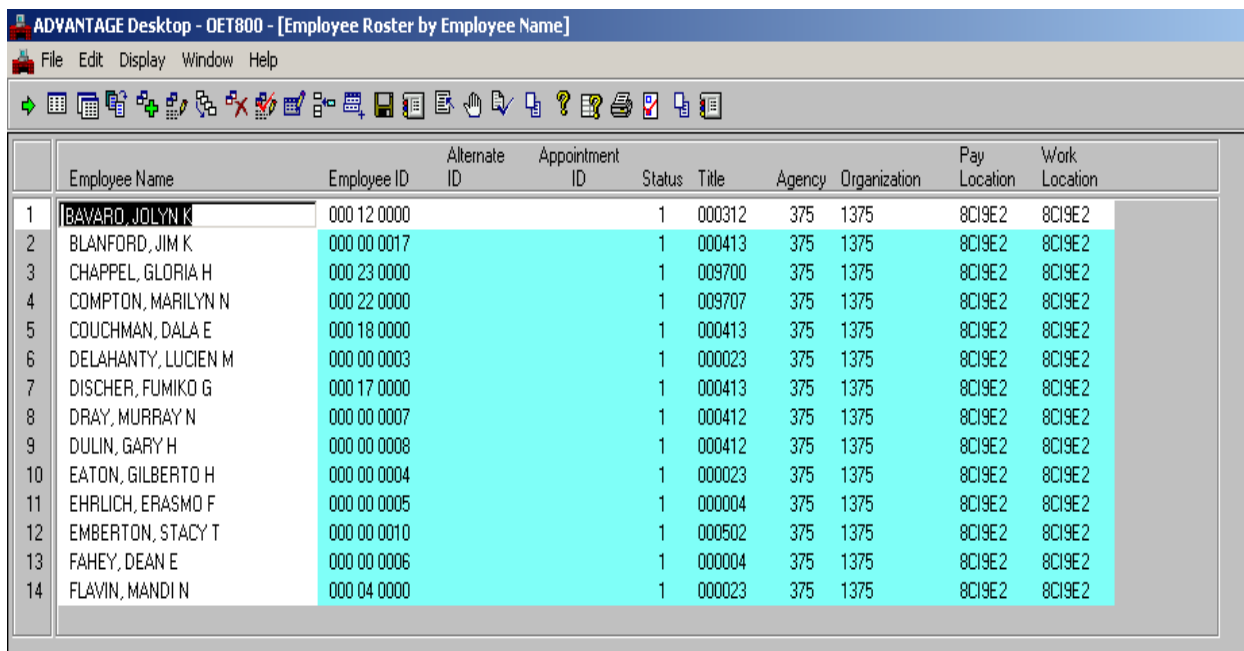
The security profile dictates the groups of inquiry windows that a user can access.

# ACCESSING INQUIRY WINDOWS

There are several ways to find information about HR/Payroll processing. Inquiry windows, on-line reports, and data warehouse reports can all be used to view data. In the previous chapters, you processed a PSMT transaction and a CPER document. Accepted transactions and documents update inquiry windows, on-line reports and data warehouse reports. Though viewing of some reports will be restricted to certain users, inquiry windows can be viewed by anyone. Inquiry windows can be accessed using the Go To window as well as established Business Areas. Let's view some of the inquiry windows that are updated by the PSMT transaction and the CPER document.

## Roster by Employee Name (QXRF)

The Employee Roster By Employee Name (QXRF) window is used to display a list of all employees and basic information for each employee sorted by employee name. You can enter an employee's name to begin the list at a specific employee. Selection Criteria: Employee Name



	Employee Name	Employee ID	Alternate ID	Appointment ID	Status	Title	Agency	Organization	Pay Location	Work Location
1	BAVARO, JOLYN K	000 12 0000			1	000312	375	1375	8C19E2	8C19E2
2	BLANFORD, JIM K	000 00 0017			1	000413	375	1375	8C19E2	8C19E2
3	CHAPPEL, GLORIA H	000 23 0000			1	009700	375	1375	8C19E2	8C19E2
4	COMPTON, MARILYN N	000 22 0000			1	009707	375	1375	8C19E2	8C19E2
5	COUCHMAN, DALA E	000 18 0000			1	000413	375	1375	8C19E2	8C19E2
6	DELAHANTY, LUCIEN M	000 00 0003			1	000023	375	1375	8C19E2	8C19E2
7	DISCHER, FUMIKO G	000 17 0000			1	000413	375	1375	8C19E2	8C19E2
8	DRAY, MURRAY N	000 00 0007			1	000412	375	1375	8C19E2	8C19E2
9	DULIN, GARY H	000 00 0008			1	000412	375	1375	8C19E2	8C19E2
10	EATON, GILBERTO H	000 00 0004			1	000023	375	1375	8C19E2	8C19E2
11	EHRlich, ERASMO F	000 00 0005			1	000004	375	1375	8C19E2	8C19E2
12	EMBERTON, STACY T	000 00 0010			1	000502	375	1375	8C19E2	8C19E2
13	FAHEY, DEAN E	000 00 0006			1	000004	375	1375	8C19E2	8C19E2
14	FLAVIN, MANDI N	000 04 0000			1	000023	375	1375	8C19E2	8C19E2

## Position Roster (QPSR)

The Position Roster (QPSR) window provides a detailed history of past and current incumbents of a position. When you enter the agency, organization (if used at your site) and position number, this inquiry displays information on all employees for the specified position. The effective and expiration dates associated with each incumbent detail line indicate the time period he/she occupied the position. Selection Criteria: Agency, Organization, Position Number, Effective Date, Expiration Date

**ADVANTAGE Desktop - OET800 - [Position Roster]**

File Edit Display Window Help

Agency: 375 Organization: 1375 Position Number: 0000001

Effective Date: 12 / 13 / 13 Expiration Date: 99 / 99 / 99

Short Description: PERS CLK

Long Description: PERSONNEL CLERK

	Employee Name	Employee ID	Appointment ID	Effective Date	Expiration Date	Status	Title	Sub-title	% Full-time
1	GRAGG, ABRAM B	000000001		08 01 13	99 99 99	1	000627	L1	1.0000
2	MATSUO, BARBERA C	000010000		08 01 13	99 99 99	1	000627	L1	1.0000
3									
4									
5									
6									

## Issued Checks/Advices (QISS)

The Issued Checks/Advices (QISS) inquiry displays all issued checks/advices for a selected employee. This window displays each issued check/advice on a separate detail line. Summary pay information, such as gross pay, deductions, and net pay, is displayed for each issued check/advice. If only the Employee ID is entered, all issued checks/advices for the specified employee are displayed in reverse chronological order. To access specific check/advice information, enter additional key information. Selection Criteria: Employee ID, Appointment ID, Check Date, HR Bank Account, Check Number

ADVANTAGE Desktop - OET800 - [Issued Checks / Advices]

File Edit Display Window Help

Name: GRAGG, ABRAM B

Employee ID: 000 - 00 - 0001

	Appointment ID	Check Date	HR Bank Account	Check Number	Type of Check	Gross Pay	Deductions	Net Pay Amount	Disposition	Disposition Date
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										

## Employment Verification (QVER)

The Employment Verification Inquiry (QVER) window is used to display consolidated employee information taken from the Employment Status Maintenance, Employee Address, and Employee Attribute windows. Selection Criteria: Employee ID, Appointment ID, Selection Date

**ADVANTAGE Desktop - OET800 - [Employment Verification Inquiry]**

File Edit Display Window Help

Name: GRAGG, ABRAM B

Employee ID: 000 - 00 - 0001 Appointment ID: Selection Date: 12 / 13 / 13

Last Personnel Action: NHIRE NEW HIRE Last Personnel Reason: A01

Effective Date: 08 / 01 / 13 Expiration Date: 99 / 99 / 99

Pay Rate Employee Attributes Appointment Information Personal Information

Annual Hours: 2080.00000 Annual Rate: 26,459.8880

Hours Per Day: 8.00000 Percent FTE: 1.0000

Base Rate: 1,102.5000 Amount Basis: P

Pay Policy: STAND Grade: A15

Step: D

Current Selection Year

Base	Gross	Base Total	Gross Total
13	13	0.00	0.00

Previous Selection Year

Base	Gross	Base Total	Gross Total
12	12	0.00	0.00