CONNECT
Maryland Judiciary

STUDENT TRAINING GUIDE

CONNECT - Manager Self-Service

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CONNECTed

NOTES

CONNECT - Manager Self-Service

Student Name

Instructor(s) Name(s)

Class Date

Go Live Date

Help Desk 410-260-1114

Online Training Library: http://mdcourts.gov/connect/connected/

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CONNECT Manager Self-Service

Important Information

Modern software evolves at an ever-increasing speed. A result is that there are updates to software on a regular basis. In the case of CONNECT, there will be regular updates, as needed, before Go live, and updates on a quarterly basis after Go Live. The on-line learning materials will be updated as well, which is why our on-line library of CONNECTed is such a valuable resource for you and for other learners.

This document is intended ONLY as a classroom session learning aide for CONNECTors. Portions of the content will change prior to CONNECT Go Live. The on-line documentation should always be considered as the current, accurate source. CONNECTors, and Judiciary employees, should regularly check for updates. Proactive notices will be available on the CONNECT portal and via email updates.

We recommend you always point other learners to the on-line resources available to them in CONNECTed.

Introduction to Manager Self-Service

Introduction to Manager Self-Service

Manager Self-Service is the navigational folder from which managers/supervisors can access all sections of CONNECT to manage their direct reports.

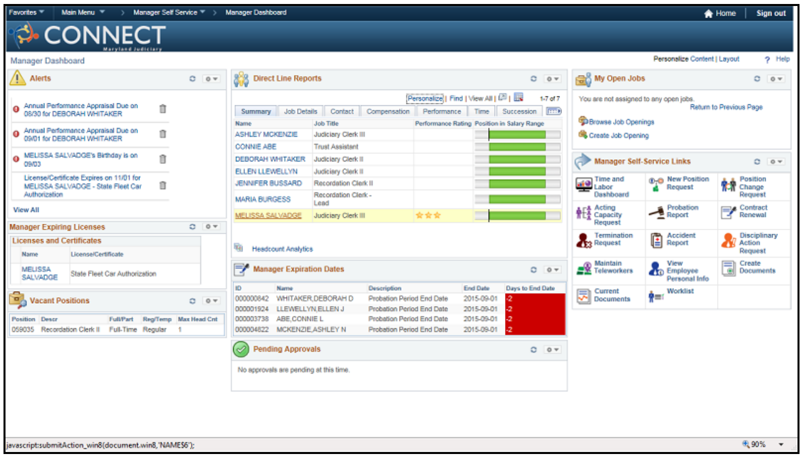
During this module you will review topics on:

- Manager Dashboard
- Worklists: A List of All Pending Approvals
- Understanding the Time and Labor Dashboard
- Search/Fill In a Form: Forms You have Submitted
- Approve/Review a Form: Forms Awaiting Your Approval

Manager Dashboard

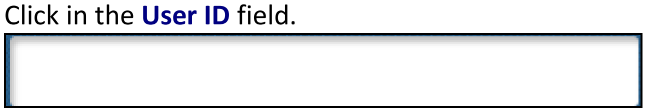
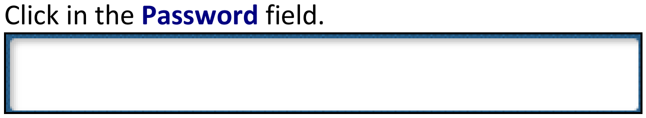
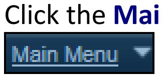
The Manager Dashboard provides supervisors a quick view of:

- Alerts
- Expiring Licenses
- Direct Line Reports (summary, job details, contact, compensation, etc.)
- Manager Self-Service Links
- Manager Expiration Dates
- Job Openings (created by the manager)
- Vacant Positions
- Pending Approvals



Procedure

This topic will describe the various pagelets available in the Manager Dashboard.

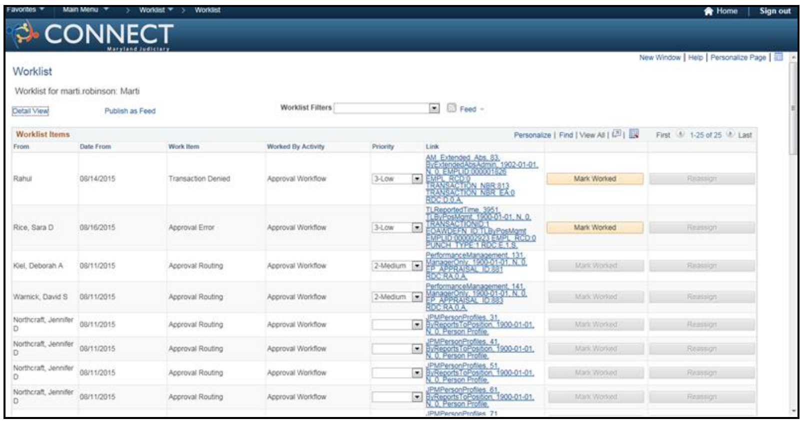
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Dashboard** menu. 	
8.	The manager dashboard is the centralized page to facilitate manager's tasks.	
9.	Alerts display items that require actions based deadlines. It will also alert you on direct reports birthdays and anniversaries.	
10.	The Manager Expiring Licenses pagelet displays all of the direct report's licenses and certificates expiring within 60 days.	

Step	Action	Notes
11.	The Vacant Positions pagelet displays direct report current vacant positions.	
12.	The My Open Jobs pagelet displays all the job openings created by the manager.	
13.	The Manager Self-Service Links pagelet provides quick access to the various request forms.	
14.	The Pending Approvals pagelet displays a list of pending approvals required manager's attention.	
15.	The Manager Expiration Dates pagelet will display probationary period end dates, expiring contracts, and acting capacity end dates. The **Days to End Date** column color codes are: **Yellow** shows within 15 days of expiration. **Red** shows within 5 days of expiration.	
16.	The Direct Line Reports pagelet displays all employees' summary information including Job Details, Contact, Compensation, and Performance.	
17.	Click the **MELISSA SALVADGE** link to access the Talent Summary page. MELISSA SALVADGE	
18.	The Talent Summary page provides the job information at the top. The bottom displays a set of pagelets with employee's details of qualification, compensation and performance.	
19.	Click the scrollbar to move down the page.	
20.	Click the scrollbar to move up the page.	
21.	Click the **Return To Manager Dashboard** link. Return To Manager Dashboard	
22.	Click the **Job Details** object. Job Details	
23.	Click the **Contact** object. Contact	
24.	Click the **Compensation** object. Compensation	
25.	Click the **Performance** object. Performance	
26.	Click the **Summary** object. Summary	
27.	Click the **Home** link. Home	

Step	Action	Notes
28.	Click the **Sign out** link. Sign out	
29.	You have completed the review of the Manager Dashboard topic. **End of Procedure.**	

Worklist

Worklists are prioritized lists of the work items that a person (or group of people) has to do.



Procedure

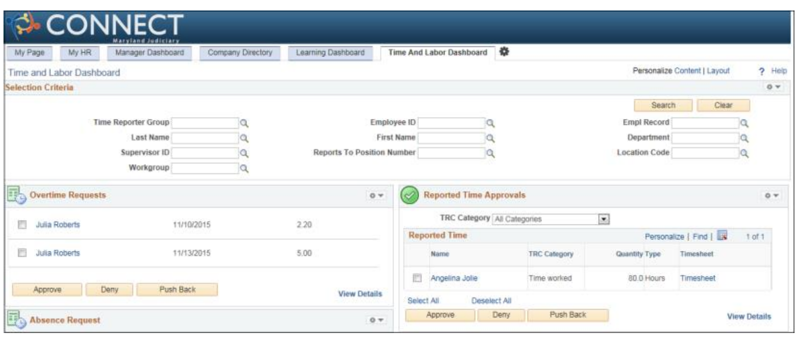
In this topic you will review using the Worklist to view notification messages.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**lee.robinson**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Worklist** menu. Worklist	
8.	Click the **Worklist** menu. Worklist	

Step	Action	Notes
9.	Worklists are prioritized lists of the work items that a person (or group of people) has to do.	
10.	You can sort the worklist items by clicking on the headers of each column. For example: by clicking on the **Date From**, the items will sort by date.	
11.	When work is routed to a CONNECT user, it is put in the user's worklist. To work on an item, select it from the worklist and the appropriate page will open so you can begin work.	
12.	Click the **Home** link. Home	
13.	Click the **Sign out** link. Sign out	
14.	You have completed reviewing how to use the Worklist to view notification messages. **End of Procedure.**	

Understanding the Time and Labor Dashboard

The Time and Labor Dashboard allows Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.



Procedure

In this topic, you will review the time and labor dashboard.

Step	Action	Notes
1.	Click the **Time And Labor Dashboard** tab. Time And Labor Dashboard	

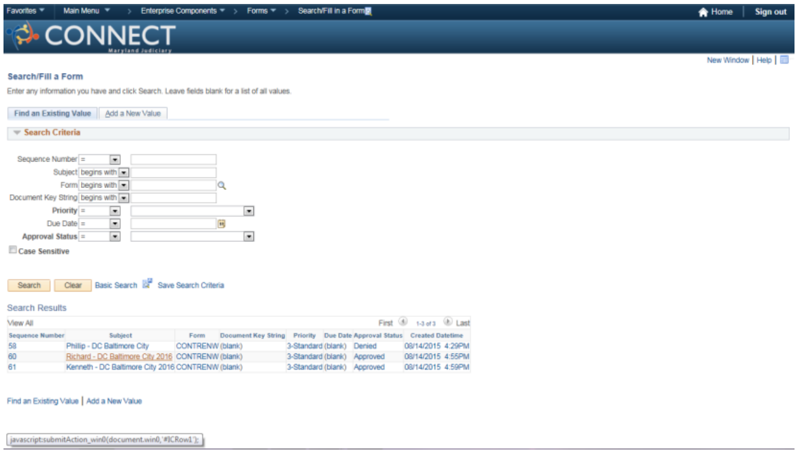
Step	Action	Notes
2.	The Time and Labor Dashboard is separate from the Manager Dashboard allowing Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.	
3.	When an employee submits an overtime request, leave request, or timesheet, their direct manager will be notified of the approval request via email and/or the Time and Labor Dashboard. **Note:** If the direct manager does ***not*** approve the request prior to payroll processing, all pending requests will be routed to the manager's manager for review and approval.	
4.	Overtime requests and absence requests are displayed on the left side of the page.	
5.	Reported time approvals and schedule deviations are displayed on the right side of the page.	
6.	Notice each approval section gives you the option to approve, deny, or pushback directly from the dashboard. It is recommended however, that you click the employee's name for the desired request to view the request details, then approve, deny, or pushback.	
7.	The Selection Criteria fields allow you to enter specific criteria in order to filter the approval requests displayed on the dashboard.	
8.	Click the **Look up Last Name** button.	
9.	Click the **Jolie** link. Jolie	
10.	Click the **Search** button. Search	
11.	Notice Angelina Jolie is now the only employee displayed on the dashboard.	
12.	Click the **Clear** button to clear the search criteria that was previously entered. Clear	
13.	Click the **Search** button. Search	
14.	Notice that all approval requests are displayed on the dashboard.	

Step	Action	Notes
15.	Click the **Julia Roberts** link to view the details of her overtime request. Julia Roberts	
16.	View the request details. From this page, you can approve, deny, or pushback the request.	
17.	For this example, click the **Close (X)** button to close the Overtime Request Details page.	
18.	Click the **Angelina Jolie** link to view the details of her absence request. Angelina Jolie	
19.	View the request details.	
20.	Click the **Vertical** scrollbar to move down the page.	
21.	From this page, you can approve, deny, or pushback the request.	
22.	For this example, click the **Return** button. Return	
23.	Click the **Angelina Jolie** link to view the details of her timesheet. Angelina Jolie	
24.	By clicking in to the employee's reported time, you have the ability to select all rows of time or individual rows of time to approve, deny, or push back.	
25.	Click the checkbox for the 11/11/2015 row.	
26.	At this point, you can approve, deny, or pushback a single row of time for Angelina.	
27.	Click the **Select All** link to select all rows. Select All	
28.	At this point, you can approve, deny, or push back all rows of time.	
29.	Click the **Deselect All** link to deselect all rows of time. Deselect All	
30.	For this example, click the **Return** button. Return	

Step	Action	Notes
31.	If you want to ***submit*** time on behalf of one of your direct reports, you can navigate directly to their timesheet from the dashboard. Click the **Timesheet** link for Angelina. Timesheet	
32.	Click the **Jolie** link. Jolie	
33.	As a manager, you can: 1) Update and submit an employee's time 2) Approve the employee's time once it has been submitted Use the Submit button to submit and the Approve button to approve.	
34.	Click the **Time and Labor Dashboard** menu. Time and Labor Dashboard	
35.	Click the **Vertical** scrollbar to move down the page.	
36.	The Schedule Deviation graph is an analytical tool that shows the number of scheduled hours, scheduled hours to date, reported hours, approved hours, and the schedule deviation for your employees for the current time period. You can click into the graph or an employee name to view their time.	
37.	You can navigate to previous or future time periods using the left and right arrows.	
38.	Click the **Vertical** scrollbar to move up the page.	
39.	Click the **My Page** tab My Page	
40.	Click the **Sign out** link. Sign out	
41.	You have completed the topic "Understanding the Time and Labor Dashboard". **End of Procedure.**	

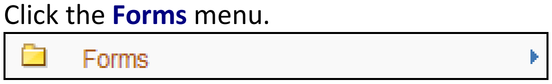
Search/Fill in a Form

The Search/Fill in a Form feature allows you to search and access all the forms you have submitted.



Procedure

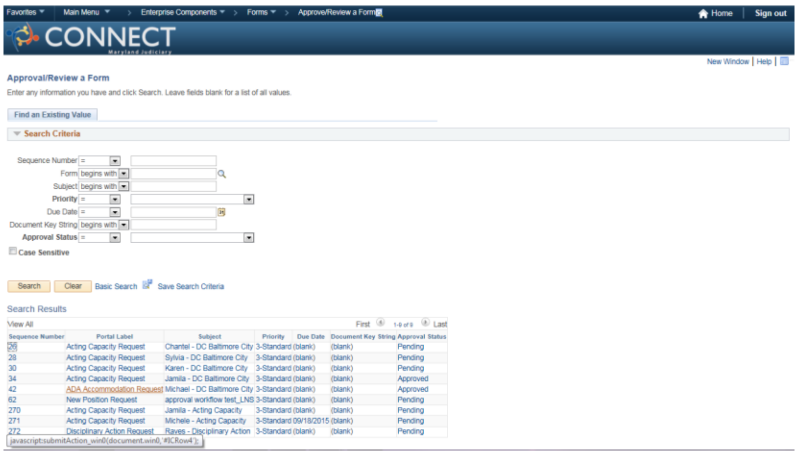
In this topic, you can search all forms you submitted.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Enterprise Components** menu. 	
8.	Click the **Forms** menu. 	
9.	Click the **Search/Fill in a Form** menu. 	
10.	You can search by the Search Criteria or you can click the **Search** button to view all of your forms.	
11.	Click the **Look up** button. 	
12.	Click the **CONTRENW** link. 	

Step	Action	Notes
13.	Click the **Search** button. Search	
14.	Review all of the forms you submitted and the status of their approvals.	
15.	Click the **Richard - DC Baltimore City 2016** link. Richard - DC Baltimore City 2016	
16.	The form will display.	
17.	To review the Approval Status Click the **Approver Status** button. Approver Status	
18.	Click the **OK** button. OK	
19.	To view another form you submitted Click the **Next in List** button. Next in List	
20.	Review the other form submitted.	
21.	Click the **Home** link. Home	
22.	Click the **Sign out** link. Sign out	
23.	**End of Procedure.**	

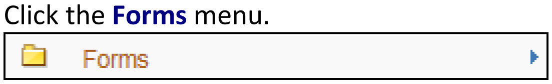
Approve/Review a Form

The Approve/Review a Form search page allows you access to all forms for which you are part of the approval/review in the workflow.



Procedure

In this topic, you can search all forms where you are in the approval process.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Enterprise Components** menu. 	
8.	Click the **Forms** menu. 	
9.	Click the **Approve/Review a Form** menu. 	

Step	Action	Notes
10.	You can search by the Search Criteria or you can click the **Search** button to view all of your forms.	
11.	Click the **Search** button. Search	
12.	Review all of the forms where you are in the approval process.	
13.	Click the **ADA Accommodation Request** link. ADA Accommodation Request	
14.	Review the approval workflow.	
15.	Click the **Go to Form** button. Go to Form	
16.	Review the form Click the **Close** button.	
17.	To view another form where you are in the approval process Click the **Next in List** button. Next in List	
18.	Review the other approval workflow.	
19.	Click the **Home** link. Home	
20.	Click the **Sign out** link. Sign out	
21.	**End of Procedure.**	

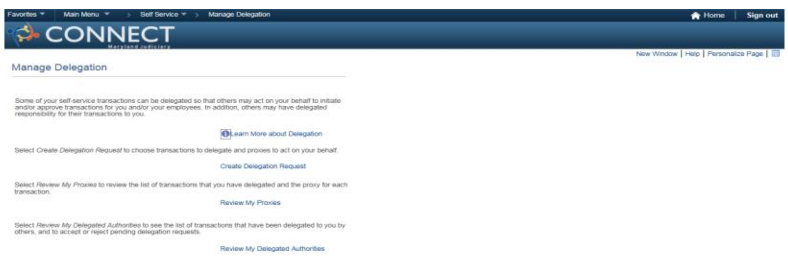
Delegation

During this module you will review topics on:

- Manage Delegation
- Delegate Transactions
- Accepting or Rejecting Delegation Authorities
- Revoking Delegation Proxies
- Reviewing Delegation Proxies

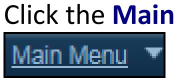
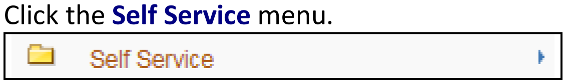
Manage Delegation

Manage Delegation allows the user to view their delegation activity.



Procedure

This topic will describe how Manage Delegations.

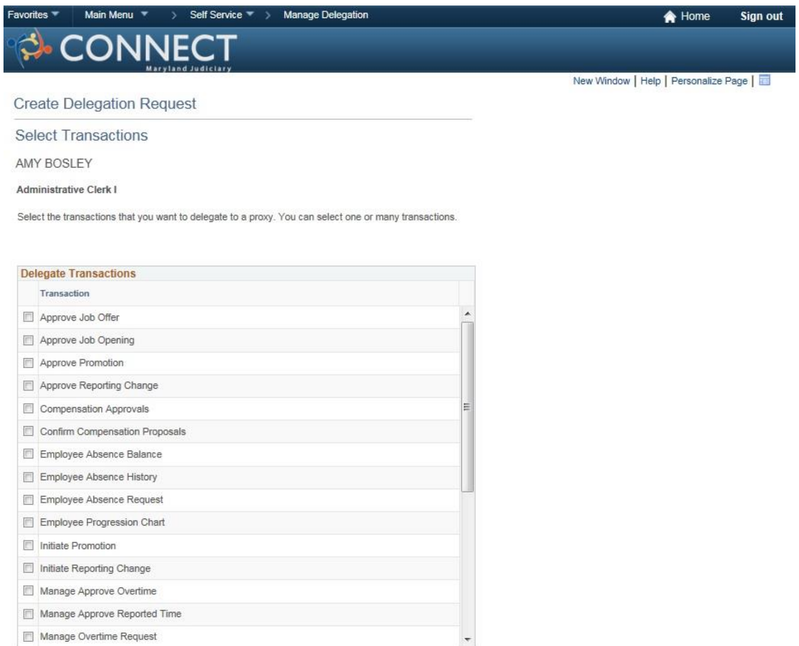
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**marti.robinson**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Self Service** menu. 	

Step	Action	Notes
8.	Click the **Manage Delegation** menu. Manage Delegation	
9.	Delegation is when a person authorizes another to serve as their representative for a particular transaction during a specific time frame. For example, a manager takes leave and wants to delegate their managerial transactions to another manager/employee while away from the office.	
10.	**Learn More about Delegation** - Learn the definition of delegation, how to manage delegations and FAQs.	
11.	**Create Delegation Request** - Delegate one or more transactions to another person that may act on your behalf for initiations or approvals.	
12.	**Review My Proxies** - Searching and updating the status of the delegation requests. For example, here is where a delegator can revoke a delgation requests.	
13.	**Review My Delegated Authorities** - You can accept or reject the delegation requests.	
14.	Click the **Home** link. Home	
15.	Click the **Sign out** link. Sign out	
16.	You have completed the Manage Delegation topic. **End of Procedure.**	

Delegate Transactions

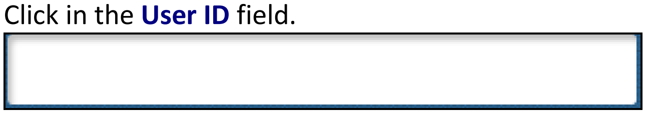
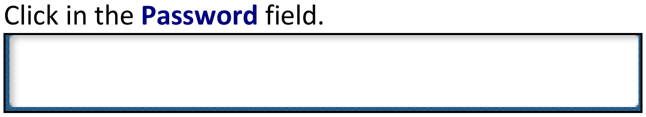
Delegating Job Offer and Opening Approvals

This topic demonstrates the process for delegating transactions. Connect uses delegation to authorize on person to serve as another person's representative when performing specific job duties.



Procedure

In this topic, an Administrative Official delegates approval responsibilities for Job Offers and Job Openings to a Hiring Manager.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	

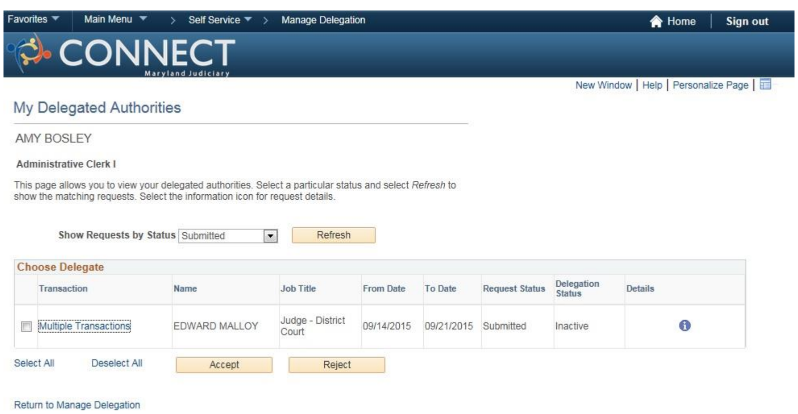
Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Manage Delegation** menu. Manage Delegation	
9.	Click the **Create Delegation Request** link. Create Delegation Request	
10.	A date range must be entered in order to delegate responsibilities.	
11.	Click in the **From Date** field. 09/08/2015	
12.	Press **[Backspace]**.	
13.	Enter "**11/20/2015**" into the **From Date** field.	
14.	Click in the **To Date** field.	
15.	Enter "**11/30/2015**" into the **To Date** field.	
16.	Click the **Next** button. Next	
17.	Here, you are able to delegate multiple responsibilities. In this example, we will delegate the "Approve Job Offer" and "Approve Job Opening" responsibilities.	
18.	Click the **Approve Job Offer** option.	
19.	Click the **Approve Job Opening** option.	
20.	Click the **Vertical** Scroll bar to move down the page.	
21.	Click the **Next** button. Next	
22.	Click the **DAVID WARNICK** option.	
23.	Click the **Vertical** Scroll bar to move down the page.	
24.	Click the **Next** button. Next	

Step	Action	Notes
25.	Before submitting, review the Delegation Detail page to confirm the information is correct.	
26.	Click the **Submit** button. 	
27.	Click the **OK** button. 	
28.	Click the **Home** link. 	
29.	Click the **Sign out** link. 	
30.	You have completed the topic "Delegating Job Offer and Opening Approvals". **End of Procedure.**	

Accepting or Rejecting Delegation Authorities

Accepting or Rejecting Delegation Authorities

This topic demonstrates the process of accepting or rejecting a delegation request. A delegation is the act of giving one's authority to another user.



Procedure

In this topic, an Administrative Official accepts the responsibility for Job Offers and Job Openings approvals.

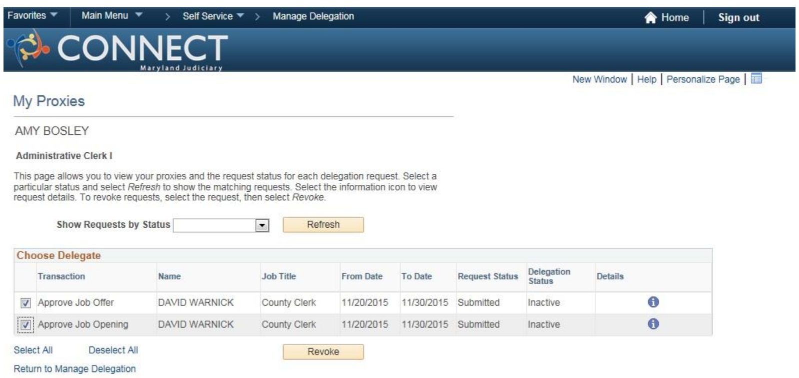
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Manage Delegation** menu. Manage Delegation	
9.	Click the **Review My Delegated Authorities** link. Review My Delegated Authorities	
10.	Click the **Multiple Transactions** link. Multiple Transactions	
11.	The Multiple Transactions page will appear. Review to find out which transactions are being delegated and who is delegating them to you.	
12.	Click the **Return** button. Return	
13.	Click the **Multiple Transactions** option.	
14.	Here, you can either Accept or Reject the delegated authority. In this example we will Accept.	
15.	Click the **Accept** button. Accept	
16.	Click the **OK** button. OK	
17.	Click the **Home** link. Home	

Step	Action	Notes
18.	Click the **Sign out** link. Sign out	
19.	You have completed the topic "Accepting or Rejecting Delegation Authorities". **End of Procedure.**	

Revoking Delegation Proxies

Revoking Delegation Proxies

This topic will demonstrate the process for a delegator withdrawing delegated authority. When a person is granted authority to act on behalf of another user, that person is deemed a proxy.



Procedure

In this topic, an Administrative Official revokes the responsibility for Job Offers and Job Openings Approvals.

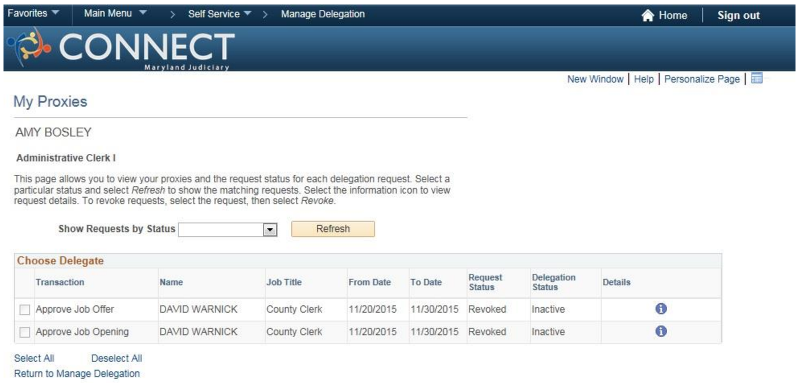
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	

Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Manage Delegation** menu. Manage Delegation	
9.	Click the **Review My Proxies** link. Review My Proxies	
10.	All proxies are listed in the "My Proxies" page. You now have the opportunity to select the delegation requests that you wish to revoke.	
11.	Click the **Approve Job Offer** option.	
12.	Click the **Approve Job Opening** option.	
13.	Click the **Revoke** button. Revoke	
14.	Click the **Yes - Continue** button. Yes - Continue	
15.	Click the **OK** button. OK	
16.	Click the **Home** link. Home	
17.	Click the **Sign out** link. Sign out	
18.	You have completed the topic "Revoking Delegation Proxies". **End of Procedure.**	

Reviewing Delegation Proxies

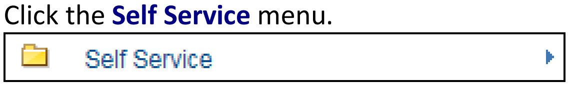
Reviewing Delegation Proxies

This topic demonstrates the process for reviewing your proxies. In Connect, you are able to view their name, job title, delegation period and delegation authority.



Procedure

In this topic, an Administrative Official reviews the delegated responsibility for Job Offers and Job Openings Approvals.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.  	
6.	Click the **Main Menu** button.  	
7.	Click the **Self Service** menu.  	
8.	Click the **Manage Delegation** menu.  	

Step	Action	Notes
9.	Click the **Review My Proxies** link. Review My Proxies	
10.	The "My Proxies" page allows the user to review their proxies.	
11.	Click the **Home** link. Home	
12.	Click the **Sign out** link. Sign out	
13.	You have completed the topic "Reviewing Delegation Proxies". **End of Procedure.**	

Human Resources Requests

The Manager Self-Service **Human Resources** learning topics include the tasks performed by managers within each business process area.

- Position Management
- New Hire Onboarding
- Employee Information
- Updating Job Information
- Tracking Labor Relations
- Health and Safety

Position Management

Plan Deployment of Workforce

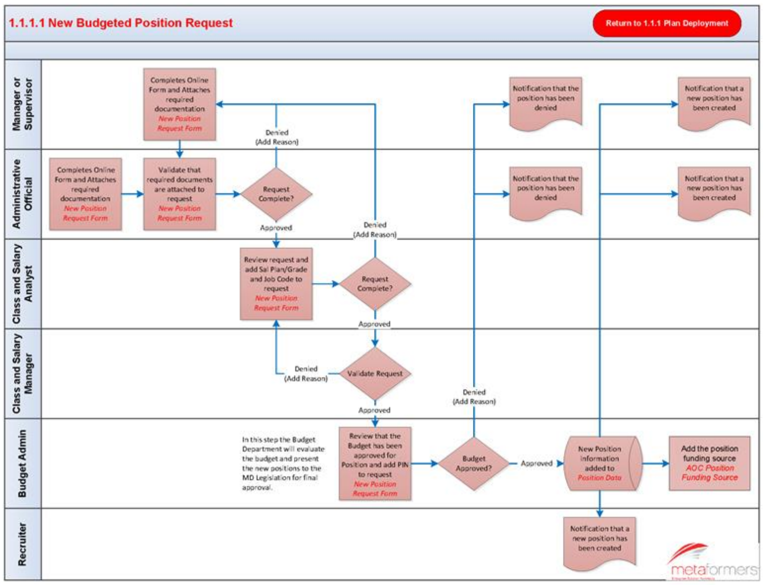
In the Plan Deployement of Workforce (Position Management) the administration will define positions and create the organizational structure. As an integrated, table-driven design, CONNECT HR helps keep and effective-dated history of all positions in the organization, whether they are filled or not. This allows for the organization to track reporting relationships independently of the employees in the positions.

During this module you will review topics on:

- New Position Request
- Position Change Request

New Position Request

New Position Request enables you to submit an electronic new position request.



Procedure

In this topic, you will go through the steps required to complete a new position request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**george.lipman**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **New Position Request** menu. 	

Step	Action	Notes
9.	Click the **"Search"** button to view previously submitted requests. To submit a new request select the **"Add a New Value"** tab.	
10.	Click the **Add a New Value** tab. Add a New Value	
11.	The system will default **Subject** name using the position's title and work location once the request is saved. The subject line will help to track the transaction.	
12.	Click in the **Jurisdiction [County Name]** field.	
13.	Enter "**Allegany County**" into the **Jurisdiction [County Name]** field.	
14.	Click in the **Contact Name** field.	
15.	Enter "**George Lipman**" into the **Contact Name** field.	
16.	Click in the **Phone Number** field.	
17.	Enter "**410-610-7895**" into the **Phone Number** field.	
18.	Click in the **Program #** field.	
19.	Enter "**010**" into the **Program #** field.	
20.	Click in the **New Position** field.	
21.	Enter "**Law Clerk**" into the **New Position** field.	
22.	Click the **Has this position been requested previously?** drop-down list.	
23.	Click the **No** list item. No	
24.	Click in the **New Contractual** field.	
25.	Enter "**Yes**" into the **New Contractual** field.	
26.	Click the **Is need associated with a New Program?** drop-down list.	

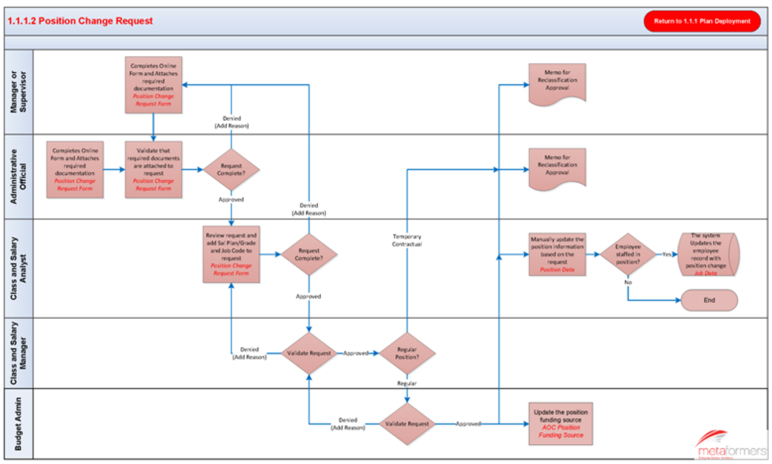
Step	Action	Notes
27.	Click the **No** list item. No	
28.	Click in the **Projected Effective Date** field.	
29.	Enter "**10/14/2015**" into the **Projected Effective Date** field.	
30.	Click the **Vertical** scrollbar to move down the page.	
31.	Click in the **Position Title** field.	
32.	Enter "**Law Clerk**" into the **Position Title** field.	
33.	Click in the **Department** field.	
34.	Enter "**0451121**" into the **Department** field.	
35.	Click in the **Location** field.	
36.	Enter "**C51-adclk**" into the **Location** field.	
37.	Click in the **Reporting To** field.	
38.	Enter "**073270**" into the **Reporting To** field.	
39.	Click the **Full-Time / Part-Time** drop-down list.	
40.	Click the **Full-Time** list item. Full-Time	
41.	Click the **Position Type** drop-down list.	
42.	Click the **Contractual** list item. Contractual	
43.	Click in the **Position Maximum Head Count** field.	
44.	Enter "**1**" into the **Position Maximum Head Count** field.	
45.	Click in the **Part-Time (%)** field.	
46.	Enter "**1.00**" into the **Part-Time (%)** field.	
47.	Click in the **Standard Hours** field.	
48.	Enter "**40**" into the **Standard Hours** field.	

Step	Action	Notes
49.	Click the **Essential Position** drop-down list.	
50.	Click the **No** list item. No	
51.	Click in the **Justification** field.	
52.	Enter "**Law Clerk is needed to assist the Administrative Judge.**" into the **Justification** field.	
53.	Click the scrollbar.	
54.	Click in the **Job Duties** field.	
55.	Enter "**Assist in all administrative tasks related to the office of the administrative judge.**" into the **Job Duties** field.	
56.	Click in the **Education and Experience** field.	
57.	Enter "**Bachelor degree and 7 years of experience**" into the **Education and Experience** field.	
58.	Click the **Vertical** scrollbar to move down the page.	
59.	You must save the form first and then submit for approval. Click the **Save** button. Save	
60.	Click the **Vertical** scrollbar to move up the page.	
61.	Click the **Submit** button. Submit	
62.	**NOTE:** If the request is made a the first level approver, the Administrative Official, then the status is "Skipped". The second approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
63.	The approval chain displays the individuals who will receive notifications, review, and either approve or deny the request.	
64.	Click the **OK** button. OK	
65.	Click the **Home** link. Home	
66.	Click the **Sign out** link. Sign out	

Step	Action	Notes
67.	You have completed the steps to submitt a new position request. **End of Procedure.**	

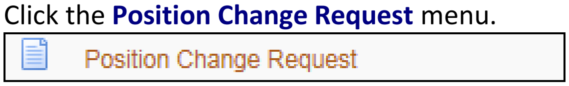
Position Change Request

A Position Change Request is an electronic form to request changes to an existing positon.



Procedure

In this topic you will go through the steps of completing a position change request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**marti.robinson**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Position Change Request** menu. 	

Step	Action	Notes
9.	Click the **Add a New Value** tab. Add a New Value	
10.	Click the **Attachments** tab. Attachments	
11.	**NOTE:** Not all position change request require a completed Position Description Questionnaire (PDQ) form. Use the instructions tab to see details.	
12.	Download the PDQ form, complete and save to attach to request.	
13.	Once you have completed the PDQ and saved the file you will need to attach it to your position change request.	
14.	Click the **Form** tab. Form	
15.	Enter the position number or use the look up to select from a predefined list of options. Click in the **Position Number (PIN)** field.	
16.	Enter "**001080**" into the **Position Number (PIN)** field.	
17.	The Position Number (PIN) will auto populate the Subject and Position Attribute Changes. Update the details of the position atribute, if needed.	
18.	Click the **Type of Change** drop-down list.	
19.	The type of change menu list provides all the options available for the position change. Click the **Reclassification** list item. Reclassification	
20.	Enter the employee ID or use the look up to search by last name or first name. Click in the **Employee ID** field.	
21.	Enter "**000002078**" into the **Employee ID** field.	
22.	The Employee ID will auto populate the Employee Name.	

Step	Action	Notes
23.	Enter or click the calendar to choose the date when the position change must take effect. Click in the **Effective Date** field.	
24.	Enter "**8/31/2015**" into the **Effective Date** field.	
25.	Click in the **Title** field. HR Officer I	
26.	Press **[Backspace]**.	
27.	Enter "**HR Officer II**" into the **Title** field.	
28.	Click the **Veritcal** scrollbar to move down the page.	
29.	Click the **Essential Position** drop-down list.	
30.	Click the **No** list item. No	
31.	Click in the **Justification** field.	
32.	Enter "**The employee qualifies to be reclassified to a higher level.**" into the **Justification** field.	
33.	Click the scrollbar.	
34.	You must save the form first and then submit for approval. Click the **Save** button. Save	
35.	Click the **Vertical** scrollbar to move up the page.	
36.	Click the **Submit** button. Submit	
37.	The first approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
38.	The approval chain displays the individuals who will receive notifications, review, and either approve or deny the request.	
39.	Click the **OK** button. OK	
40.	Click the **Home** link. Home	

Step	Action	Notes
41.	Click the scrollbar.	
42.	Click the **Sign out** link. Sign out	
43.	You have completed the steps of completing a position change request. **End of Procedure.**	

Employee Information

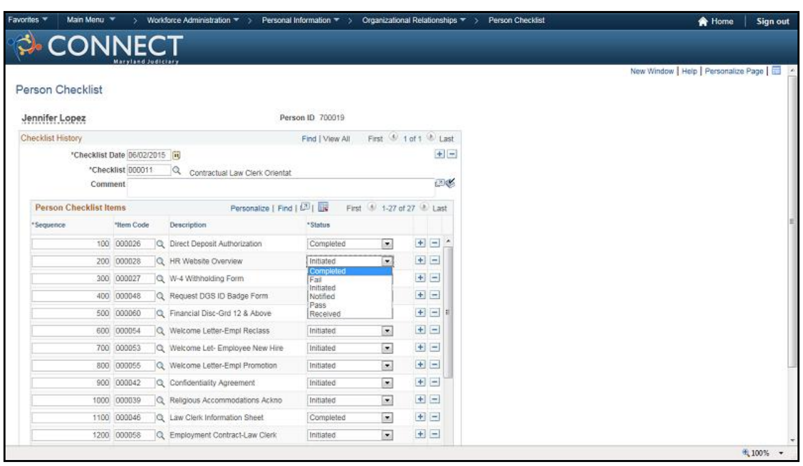
Updating Employee Information

During this module you will review topics on:

- Update Onboarding Checklist
- Add an Attachment for an Employee
- Add Telework Information for an Employee

Update Onboarding Checklist

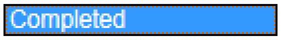
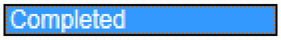
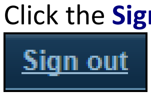
An onboarding checklist is used to track the documentation an employee must submit during the onboarding process.



Procedure

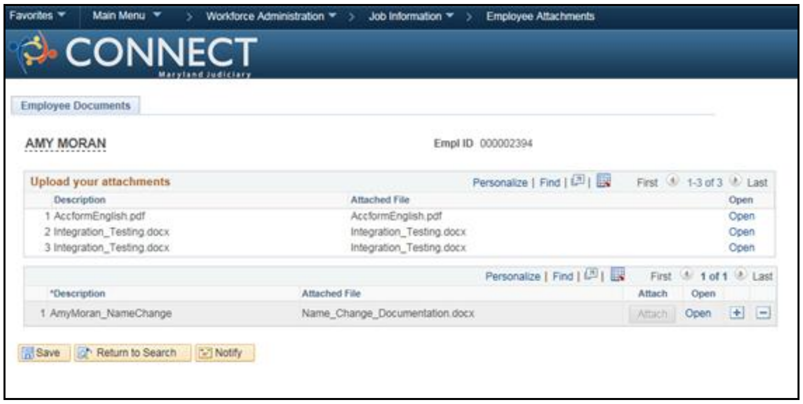
In this topic you will go through the steps of updating the onboarding checklist of documentation the employee provides.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Workforce Administration** menu. Workforce Administration	
8.	Click the **Personal Information** menu. Personal Information	
9.	Click the **Organizational Relationships** menu. Organizational Relationships	
10.	Click the **Person Checklist** menu. Person Checklist	
11.	Enter "**700019**" into the **Empl ID** field.	
12.	Click the **Search** button. Search	
13.	As a HR Liaison, you can update the status of your direct report's onboarding documentation as they complete it. For this example we will update the status for all documents provided by the employee.	
14.	Click the **Status** drop-down list. Notified	
15.	Click the **Completed** list item. Completed	
16.	Click the **Status** drop-down list. Initiated	
17.	Click the **Completed** list item. Completed	
18.	Click the **Status** drop-down list. Initiated	

Step	Action	Notes
19.	Click the **Completed** list item. 	
20.	Click the **Status** drop-down list. 	
21.	Click the **Completed** list item. 	
22.	Click the scrollbar.	
23.	Click the **Save** button. 	
24.	Click the scrollbar.	
25.	Click the **Home** link. 	
26.	Click the scrollbar to move across the page. 	
27.	Click the **Sign out** link. 	
28.	You have completed the steps of updating the onboarding checklist of documentation the employee provides. **End of Procedure.**	

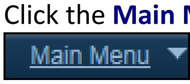
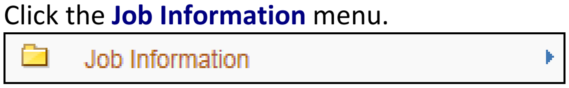
Add an Attachment for an Employee

Managers can add attachments of required documentation on behalf of their employee.



Procedure

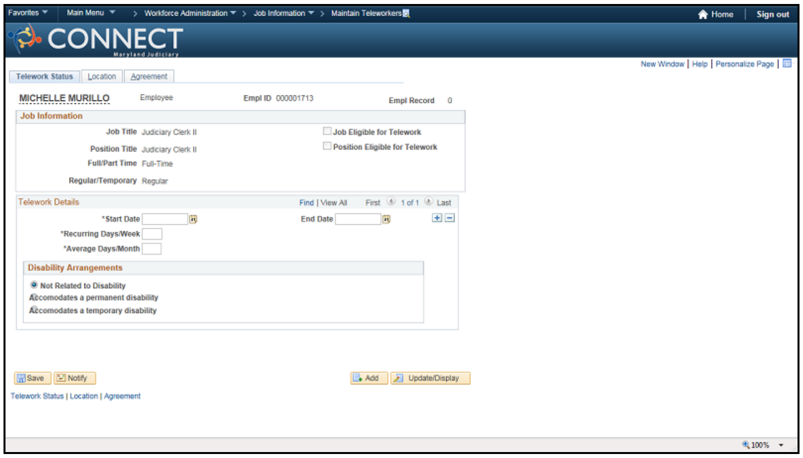
In this topic you will go through the steps of attaching documentation on behalf of an employee.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**ht.burgess**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Workforce Administration** menu. 	
8.	Click the **Job Information** menu. 	
9.	Click the **Employee Attachments** menu. 	
10.	Enter "**000002394**" into the **begins with** field.	

Step	Action	Notes
11.	Click the **Search** button. Search	
12.	All previously attached documents are listed for review.	
13.	Click in the **Description** field.	
14.	Enter "**AmyMoran_NameChange**" into the **Description** field.	
15.	Click the **Attach** button. Attach	
16.	To attach a file select the document from your computer to upload click on the browse button and the click on upload.	
17.	Click the **Upload** button. Upload	
18.	Click the **Save** button. Save	
19.	Click the **Home** link. Home	
20.	Click the scrollbar to move across the page.	
21.	Click the **Sign out** link. Sign out	
22.	You have completd the steps of attaching documentation on behalf of an employee. **End of Procedure.**	

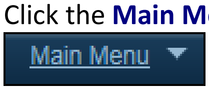
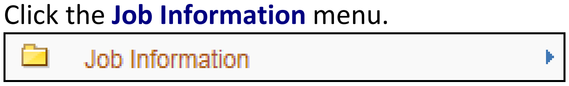
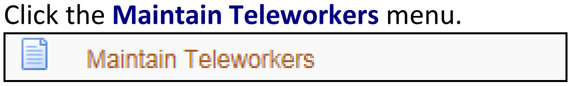
Add Telework Information for an Employee

This topic demonstrates how to add/update an employee's telework information.



Procedure

In this topic you will go through the steps of adding the telework information for an employee who will work at a different location.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**cheryl.hipkins**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Workforce Administration** menu. 	
8.	Click the **Job Information** menu. 	
9.	Click the **Maintain Teleworkers** menu. 	
10.	Click the **Add a New Value** tab. 	

Step	Action	Notes
11.	Enter "**000001713**" into the **Empl ID** field.	
12.	Click the **Add** button. Add	
13.	Enter the date when teleworking should begins. Click in the **Start Date** field.	
14.	Enter "**04/02/2015**" into the **Start Date** field.	
15.	Enter the date when the teleworking will end. Click in the **End Date** field.	
16.	Enter "**09/30/2015**" into the **End Date** field.	
17.	Enter how many days a week will the employee telework. Click in the **Recurring Days/Week** field.	
18.	Enter "**3**" into the **Recurring Days/Week** field.	
19.	Enter how many total days in the month will the employee work. Click in the **Average Days/Month** field.	
20.	Enter "**12**" into the **Average Days/Month** field.	
21.	Click the **Location** tab. Location	
22.	Click the **Worksite** drop-down list.	
23.	When you select Home the employee's home address will automatically auto populate. Click the **Home** list item. Home	
24.	Click the **Agreement** tab. Agreement	
25.	Click the **No Associated equipment/service costs incurred** option.	

Step	Action	Notes
26.	Click the **Telework Agreement is in place** option.	
27.	Click in the **Agreement Date** field.	
28.	Enter "**04/02/2015**" into the **Agreement Date** field.	
29.	Click the **Status** drop-down list.	
30.	Click the **Approved** list item. Approved	
31.	Click in the **Status Date** field.	
32.	Enter "**04/02/2015**" into the **Status Date** field.	
33.	Click the **Save** button. Save	
34.	Click the **Home** link. Home	
35.	Click the scrollbar to move across the page.	
36.	Click the **Sign out** link. Sign out	
37.	You have competed the steps of adding the telework information for an employee. **End of Procedure.**	

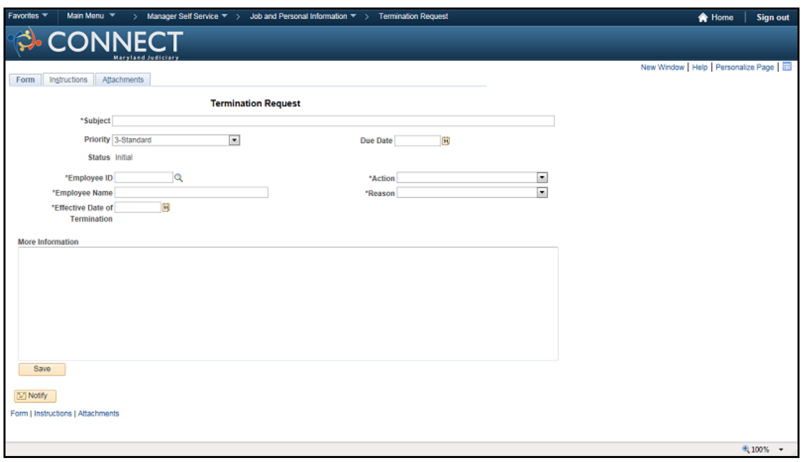
Update Job Information

The Job Information module will demonstrate process for:

- Termination Request
- Probation Period Recommendation
- Acting Capacity Request
- Approve Acting Capacity Request
- Run the Contract Report
- Contract Renewal Request with Attached Contract

Termination Request

Termination Request form is an electronic request to terminate an employee because of retirement, contract termination, death, disability, job abandonment, resignation, and transfer to state agency.



Procedure

In this topic you will go through the steps for submitting a termination request.

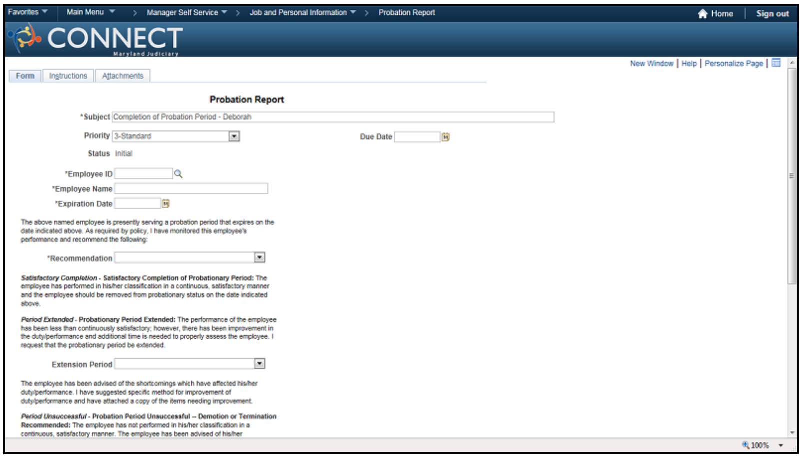
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**timothy.haven**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Job and Personal Information** menu. Job and Personal Information	
9.	Click the **Termination Request** menu. Termination Request	
10.	Click the **"Search"** button to view previously submitted requests. To submit a new request select the**"Add a New Value"** tab.	
11.	Click the **Add a New Value** tab. Add a New Value	
12.	Click the **Attachments** tab. Attachments	
13.	Click the **Attach** button. Attach	
14.	To attach a file select the document from your computer to upload click on the browse button and the click on upload. For example, a resignation letter. Browse...	
15.	Click the **Upload** button. Upload	
16.	Click the **Form** tab. Form	
17.	Click in the **Employee ID** field.	
18.	Enter "**000005168**" into the **Employee ID** field.	
19.	The Employee ID will auto populate the Subject and Employee Name.	

Step	Action	Notes
20.	Click in the **Effective Date of Termination** field.	
21.	Enter "**09/02/2015**" into the **Effective Date of Termination** field.	
22.	Click the **Action** drop-down list.	
23.	Click the **Retirement** list item. Retirement	
24.	Click the **Reason** drop-down list.	
25.	Click the **Retirement** list item. Retirement	
26.	Click the **Save** button. Save	
27.	Click the **Submit** button. Submit	
28.	The approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
29.	Click the **OK** button. OK	
30.	Click the **Home** link. Home	
31.	Click the **Sign out** link. Sign out	
32.	You have completed the steps for submitting a termination request. **End of Procedure.**	

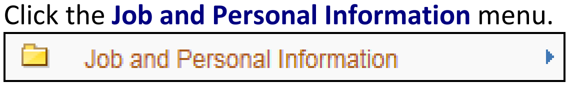
Probation Period Recommendation

The Probation Period Report form



Procedure

In this topic you will go through the steps of completing a probation period recommendation form.

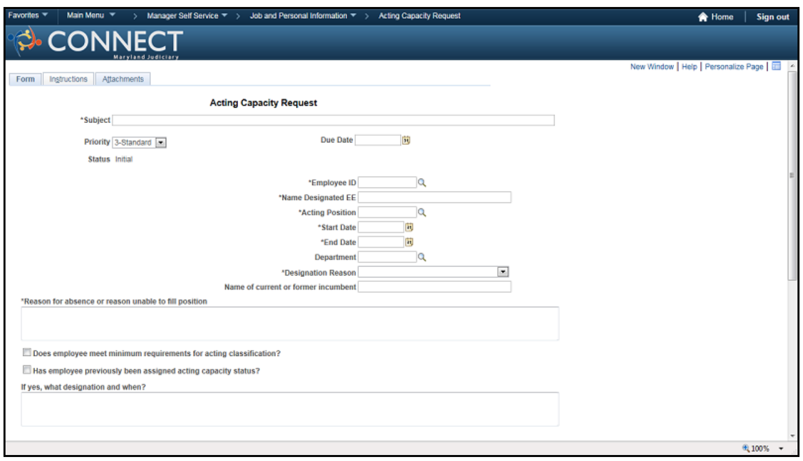
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Job and Personal Information** menu. 	

Step	Action	Notes
9.	Click the **Probation Report** menu. Probation Report	
10.	Click the **"Search"** button to view previously submitted requests. To submit a new request select the **"Add a New Value"** tab.	
11.	Click the **Add a New Value** tab. Add a New Value	
12.	Click in the **Employee ID** field.	
13.	Enter "**000000842**" into the **Employee ID** field.	
14.	The Employee ID will auto populate the Subject and Employee Name.	
15.	Click in the **Expiration Date** field.	
16.	Enter "**08/30/2015**" into the **Expiration Date** field.	
17.	Click the **Recommendation** drop-down list.	
18.	For this example we will use the Satisfactory Completion. In a scenario where the choice is Period Extended a choice must be selected from the next menu list, Extension Period. If the scenario is to choose Period Unsuccessful, then an option must be checked next to Demote or Terminate employee. Click the **Satisfactory Completion** list item. Satisfactory Completion	
19.	Click the scrollbar.	
20.	Click the **Save** button. Save	
21.	Click the scrollbar.	
22.	Click the **Submit** button. Submit	
23.	The approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
24.	Click the **OK** button. OK	

Step	Action	Notes
25.	Click the **Home** link. Home	
26.	Click the scrollbar to move across the page.	
27.	Click the **Sign out** link. Sign out	
28.	You have completed the steps of completing a probation period recommendation form. **End of Procedure.**	

Acting Capacity Request

Acting Capacity form is an electronic request to designate an employee temporarily fill another's position.



Procedure

In this topic you will go through the steps of submitting an acting capacity request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**cheryl.hipkins**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	

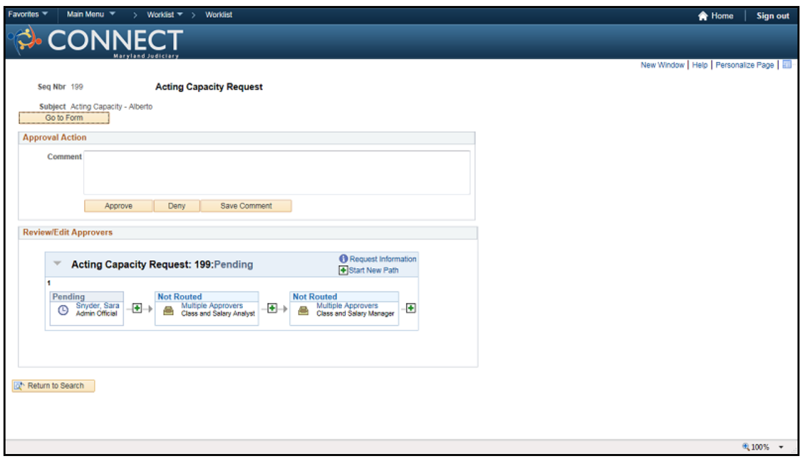
Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Job and Personal Information** menu. Job and Personal Information	
9.	Click the **Acting Capacity Request** menu. Acting Capacity Request	
10.	Click the **"Search"** button to view previously submitted requests. To submit a new request select the**"Add a New Value"** tab.	
11.	Click the **Add a New Value** tab. Add a New Value	
12.	Click the **Attachments** tab. Attachments	
13.	Click the **Attach** button. Attach	
14.	To attach a file select the document from your computer to upload click on the browse button and the click on upload.	
15.	Click the **Upload** button. Upload	
16.	Click the **Form** tab. Form	
17.	Click in the **Employee ID** field.	
18.	Enter "**000002199**" into the **Employee ID** field.	
19.	The Employee ID will auto populate the Subject and Name Designated EE.	
20.	Click in the **Acting Position** field.	
21.	Enter "**046558**" into the **Acting Position** field.	
22.	The Acting Position number will auto populate the Department.	
23.	Click in the **Start Date** field.	
24.	Enter "**09/02/2015**" into the **Start Date** field.	

Step	Action	Notes
25.	Click in the **End Date** field.	
26.	Enter "**09/28/2015**" into the **End Date** field.	
27.	Click the **Designation Reason** drop-down list.	
28.	Click the **Temporary Absence of Incumbent** list item. Temporary Absence of Incumbent	
29.	Click in the **Name of current or former incumbent** field.	
30.	Enter "**Maclean Forquer**" into the **Name of current or former incumbent** field.	
31.	Click in the **Reason for absence or reason unable to fill position** field.	
32.	Enter "**Have been unable to find a replacement at this time.**" into the **Reason for absence or reason unable to fill position** field.	
33.	Click the **Does employee meet minimum requirements for acting classification?** option.	
34.	Click the scrollbar.	
35.	Click the **Save** button. Save	
36.	Click the scrollbar.	
37.	Click the **Submit** button. Submit	
38.	The first approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
39.	The approval chain displays the individuals who will receive notifications, review, and either approve or deny the request.	
40.	Click the **OK** button. OK	
41.	Click the **Home** link. Home	
42.	Click the scrollbar to move across the page.	

Step	Action	Notes
43.	Click the **Sign out** link. Sign out	
44.	You have completed the steps of submitting an acting capacity request. **End of Procedure.**	

Approve Acting Capacity Request

Administrative Officials are the first approvers for the Acting Capacity Requests.



Procedure

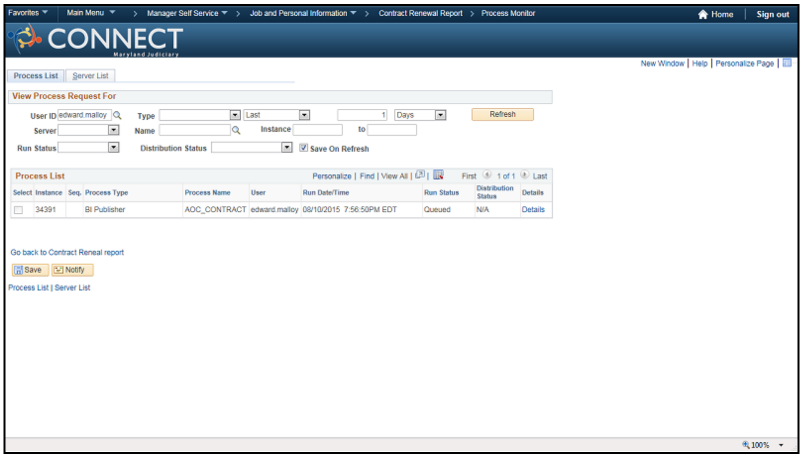
In this topic you will go through the steps for approving the acting capacity request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**sara.snyder**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Worklist** menu. Worklist	

Step	Action	Notes
8.	Click the **Worklist** menu. Worklist	
9.	You can sort the worklist items by clicking on the headers of each column. For example: by clicking on the **Date From**, the items will sort by date.	
10.	Click the **FormApproval, 1991, ACTCAPCT, 1900-01-01, N, 0, Acting Capacity** link. FormApproval, 521, ACTCAPCT, 1900-01-01, N, 0, Acting Capacity Request: ALBERTO - DC Frederick County - ACTCAPCT - 97,	
11.	Click the **Go to Form** button. Go to Form	
12.	Verify the details of the request.	
13.	Click the scrollbar.	
14.	Click the **OK** button. OK	
15.	A position change request may be approved or denied. When denying the request, a reason is required in the comment text box. NOTE: In order to include a comment when denying the request the Deny button must be clicked first. A message will prompt to include a comment. Click the OK button and then enter the comments and click the Deny button again.	
16.	Click the **Approve** button. Approve	
17.	Click the **Home** link. Home	
18.	Click the **Sign out** link. Sign out	
19.	You have completed the steps for approving the acting capacity request. **End of Procedure.**	

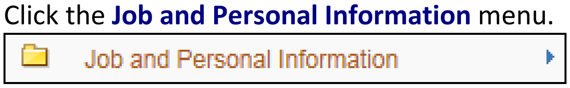
Run the Contract Report

Generate the Contract Report



Procedure

In this topic you will go through the steps of running the contract report.

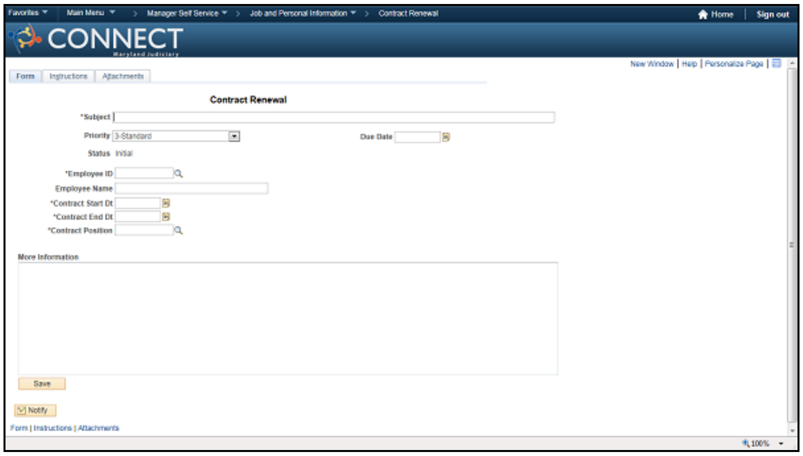
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**edward.malloy**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Job and Personal Information** menu. 	
9.	Click the **Contract Renewal Report** menu. 	

Step	Action	Notes
10.	If you have already created a Run Control ID, enter that ID into the **"begins with"** field and click the **"Search"** button. If you have not created a Run Control ID, create one by clicking on the **"Add a New Value"** tab.	
11.	Click the **Add a New Value** tab. Add a New Value	
12.	Enter "**EMTRN02**" into the **Run Control ID** field.	
13.	Click the **Add** button. Add	
14.	Click in the **Empl ID** field.	
15.	Enter "**700019**" into the **Empl ID** field.	
16.	Click the **Contract Type** drop-down list.	
17.	Select the Contract Type to generate a specific Contract Document based on the Type of Position.	
18.	Click the **Law Clerk** list item. Law Clerk	
19.	The Position Number used will be the Contract Positon, where the Employee will be staffed for the following contract year. Click in the **Position Number** field.	
20.	Enter "**59000740**" into the **Position Number** field.	
21.	Click in the **Start Date** field.	
22.	The Start of the Contract Enter "**7/1/2015**" into the **Start Date** field.	
23.	Click in the **End Date** field.	
24.	The End of the Contract Enter "**6/30/2016**" into the **End Date** field.	
25.	Click the **Run** button. Run	

Step	Action	Notes
26.	Select **"PSUNX"** from the "Server Name" drop down if not already selected. If already selected, click the "OK" button.	
27.	Click the **Server Name** drop-down list.	
28.	Click the **PSUNX** list item. PSUNX	
29.	Click the **OK** button. OK	
30.	The system will display a Process Instance number below the Process Monitor link. Use this number to monitor your process.	
31.	Click the **Process Monitor** link. Process Monitor	
32.	Once on this page allow the system a few minutes to process and then click the **Refresh** button until the Run Status shows Success . Refresh	
33.	Click the **Go back to Contract Reneal report** link. Go back to Contract Reneal report	
34.	Click the **Report Manager** link. Report Manager	
35.	Click the **AOC_LAW_CLER - 700019_L_34391.pdf** link. AOC_LAW_CLER - 700019_L_34391.pdf	
36.	Click the **700019_L_34391.pdf** link to view the report. 700019_L_34391.pdf	
37.	The Contract will display. Print and Sign before submitting to Employee Services.	
38.	Click the **Close Tab** button.	
39.	Click the **Home** link. Home	
40.	Click the **Sign out** link. Sign out	
41.	You have completed the steps of running the contract report. **End of Procedure.**	

Contract Renewal Request with Attached Contract

Contract Renewal Request



Procedure

In this topic you will go through the steps of requesting a contract renewal and attaching the contract.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**edward.malloy**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Job and Personal Information** menu. Job and Personal Information	
9.	Click the **Contract Renewal** menu. Contract Renewal	
10.	Click the **"Search"** button to view previously submitted requests. To submit a new request select the**"Add a New Value"** tab.	

Step	Action	Notes
11.	Click the **Add a New Value** tab. Add a New Value	
12.	Click the **Instructions** tab. Instructions	
13.	Click the **Attachments** tab. Attachments	
14.	Click the **Attach** button. Attach	
15.	To attach a file select the document from your computer to upload, click on the browse button and the click on upload.	
16.	Click the **Upload** button. Upload	
17.	Click the **Form** tab. Form	
18.	Click in the **Employee ID** field.	
19.	Enter "**000003370**" into the **Employee ID** field.	
20.	The Employee ID will auto populate the Subject and Employee Name.	
21.	Click in the **Contract Start Dt** field.	
22.	The Start of the Contract Enter "**7/1/2015**" into the **Contract Start Dt** field.	
23.	Click in the **Contract End Dt** field.	
24.	The End of the Contract Enter "**6/30/2016**" into the **Contract End Dt** field.	
25.	Click in the **Contract Position** field.	
26.	Verify the Position matches the Attached Contract Number. Enter "**712000**" into the **Contract Position** field.	
27.	Click the **Save** button. Save	

Step	Action	Notes
28.	Click the **Submit** button. Submit	
29.	The approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
30.	Click the **OK** button. OK	
31.	Click the **Home** link. Home	
32.	Click the scrollbar to move across the page.	
33.	Click the **Sign out** link. Sign out	
34.	You have completed the steps of requesting a contract renewal and attaching the contract. **End of Procedure.**	

Track Labor Relations

Track Labor Relations is a process that responds to the employee lifecycle. The processes related to tracking labor relations include:

- Grievance Process
- Disciplinary Action Process
- ADA Grievance Process

From these reports may be generated by the administration.

Disciplinary Action Request

Disciplinary Action Request

Procedure

In this topic you will go through the steps for submitting a disciplinary action request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**kimberly.swan**" into the **User ID** field.	

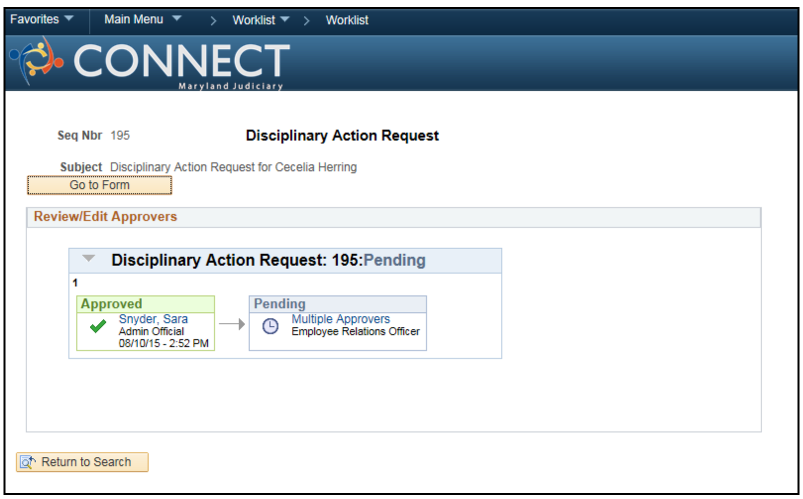
Step	Action	Notes
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Job and Personal Information** menu. Job and Personal Information	
9.	Click the **Disciplinary Action Request** menu. Disciplinary Action Request	
10.	Click the **"Search"** button to view previously submitted requests. To submit a new request select the**"Add a New Value"** tab.	
11.	Click the **Add a New Value** tab. Add a New Value	
12.	Click the **Attachments** tab. Attachments	
13.	Click the **Attach** button. Attach	
14.	To attach a file select the document from your computer to upload click on the browse button and the click on upload. Browse...	
15.	Click the **Upload** button. Upload	
16.	Click the **Form** tab. Form	
17.	Click in the **Employee ID** field.	
18.	Enter "**000002014**" into the **Employee ID** field.	
19.	The Employee ID will auto populate the Subject and Employee Name.	

Step	Action	Notes
20.	Click in the **Disciplinary Action Type** field.	
21.	Select the type of offense. For example, Fighting. Enter "**001**" into the **Disciplinary Action Type** field.	
22.	Click in the **Reported Date** field.	
23.	Enter "**03/11/2015**" into the **Reported Date** field.	
24.	Click in the **Description** field.	
25.	Enter "**Mary began an argument with another employee and hit him on his shoulder.**" into the **Description** field.	
26.	Click in the **Supervisor ID** field.	
27.	Enter "**000001488**" into the **Supervisor ID** field.	
28.	Click in the **Resolution Date** field.	
29.	Enter "**03/13/2015**" into the **Resolution Date** field.	
30.	Click the **Resolution** button.	
31.	Select the suggested resolution. Click the **Reprimand** link. Reprimand	
32.	Click the scrollbar.	
33.	Click in the **Resolution Comments** field.	
34.	Enter "**Meet to discuss.**" into the **Resolution Comments** field.	
35.	Click the **Save** button. Save	
36.	Click the scrollbar.	
37.	Click the **Submit** button. Submit	
38.	The first approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
39.	The approval chain displays the individuals who will receive notifications, review, and either approve or deny the request.	

Step	Action	Notes
40.	Click the **OK** object. OK	
41.	Click the **Home** link. Home	
42.	Click the **Sign out** link. Sign out	
43.	You have completed the steps for submitting a disciplinary action request. **End of Procedure.**	

Approve Disciplinary Action Request

Administrative Officials approve a disciplinary action request.



Procedure

In this topic you will go through the steps for approving a disciplinary action request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**sara.snyder**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Worklist** menu. Worklist	
8.	Click the **Worklist** menu. Worklist	
9.	You can sort the Worklist items by clicking on the headers of each column. For example: by clicking on the **Date From**, the items will sort by date.	
10.	Click the **FormApproval, 1951, DISCACT, 1900-01-01, N, 0, Disciplinary Action** link. FormApproval, 541, DISCACT, 1900-01-01, N, 0, Disciplinary Action Request: MARY - DC Frederick County - DISCACT - 99,	
11.	Click the **Go to Form** button. Go to Form	
12.	Verify the details of the request.	
13.	Click the **Close** button.	
14.	Disciplinary Action Request may be approved or denied. When denying the request, a reason is required in the comment text box. NOTE: In order to include a comment when denying the request the Deny button must be clicked first. A message will prompt to include a comment. Click the OK button and then enter the comments and click the Deny button again.	
15.	Click the **Approve** button. Approve	
16.	Click the **Home** link. Home	
17.	Click the **Sign out** link. Sign out	

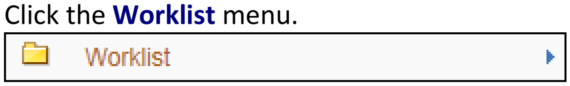
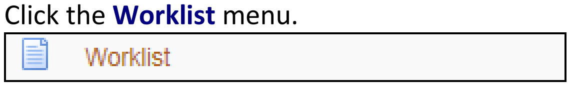
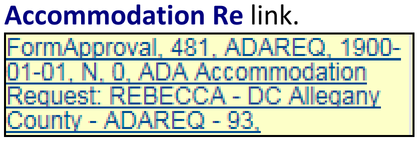
Step	Action	Notes
18.	You have completed the steps for approving a disciplinary action request. **End of Procedure.**	

Approve ADA Accommodation Request

ADA Field Coordinators approve accommodation requests.

Procedure

In this topic you will go through the steps for approving an ADA accommodation request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Worklist** menu. 	
8.	Click the **Worklist** menu. 	
9.	You can sort the **worklist** items by clicking on the headers of each column. For example: by clicking on the **Date From**, the items will sort by date.	
10.	Click the **FormApproval, 481, ADAREQ, 1900-01-01, N, 0, ADA Accommodation Re** link. 	
11.	Click the **Go to Form** button. 	

Step	Action	Notes
12.	Verify the details of the request.	
13.	Click the **Attachments** tab. Attachments	
14.	Review the attachements for the request.	
15.	Click the **Form** tab. Form	
16.	Click the scrollbar.	
17.	Click the **Accommodation Type** button.	
18.	If Employee requires multiple Accommodation types, select "**Multiple Accommodations**".	
19.	Click the **Multiple Accommodations** link. Multiple Accommodations	
20.	Click in the **Action Suggested** field.	
21.	Enter "**Wheelchair ramp, parking space and chair approved.**" into the **Action Suggested** field.	
22.	Click the **Category** drop-down list.	
23.	Click the **Physical Disability** list item. Physical Disability	
24.	Click the **OK** button. OK	
25.	An ADA Accommodation Request may be approved or denied. When denying the request, a reason is required in the comment text box. NOTE: In order to include a comment when denying the request the Deny button must be clicked first. A message will prompt to include a comment. Click the OK button and then enter the comments and click the Deny button again.	
26.	Click the **Approve** button. Approve	
27.	Click the **Home** link. Home	
28.	Click the **Sign out** link. Sign out	

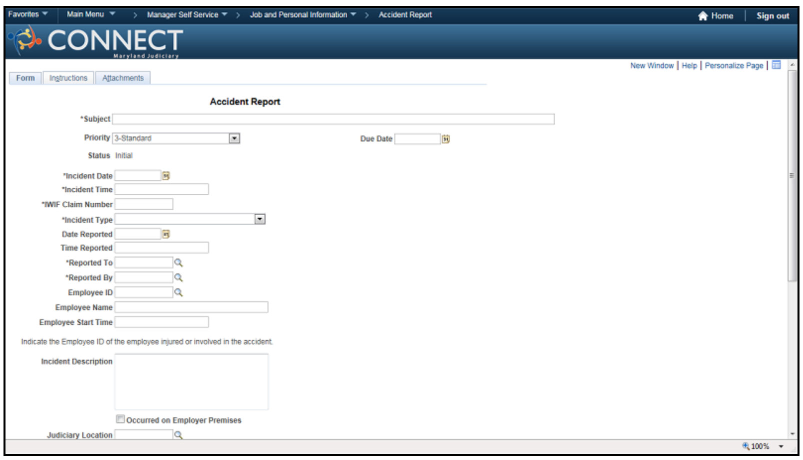
Step	Action	Notes
29.	You have completed the steps for approving an ADA accomodation request. **End of Procedure.**	

Health and Safety

Managers create accident reports with an IWIF claim number and required documentation.

Accident Report

The accident report process includes the manager's report of accidents, illness, incidents, injuries, safety violations, and unsafe practices.



Procedure

In this topic you will go through the steps for submitting an accident report.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.  	
6.	Click the **Main Menu** button.  	

Step	Action	Notes
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Job and Personal Information** menu. Job and Personal Information	
9.	Click the **Accident Report** menu. Accident Report	
10.	Click the **"Search"** button to view previously submitted requests. To submit a new request select the**"Add a New Value"** tab.	
11.	Click the **Add a New Value** tab. Add a New Value	
12.	Click the **Attachments** tab. Attachments	
13.	Documents are available to download by clicking the Open link.	
14.	Attach the completed IWIF documentation. Click the **Attach** button. Attach	
15.	To attach a file select the document from your computer to upload click on the browse button and the click on upload. Browse...	
16.	Click the **Upload** button. Upload	
17.	Click the **Form** tab. Form	
18.	Click in the **Incident Date** field.	
19.	Enter "**06/04/2015**" into the **Incident Date** field.	
20.	Click in the **Incident Time** field.	
21.	Enter "**3:30PM**" into the **Incident Time** field.	
22.	Use the IWIF Claim Number provided by IWIF. Click in the **IWIF Claim Number** field.	

Step	Action	Notes
23.	Enter "**2345678**" into the **IWIF Claim Number** field.	
24.	Click the **Incident Type** drop-down list.	
25.	Click the **Injury** list item.	
26.	Click in the **Date Reported** field.	
27.	Enter "**06/05/2015**" into the **Date Reported** field.	
28.	Click in the **Time Reported** field.	
29.	Enter "**4:00pm**" into the **Time Reported** field.	
30.	Click in the **Reported To** field.	
31.	Enter "**000000828**" into the **Reported To** field or use the look up to search by name.	
32.	Click in the **Reported By** field.	
33.	Enter "**000001914**" into the **Reported By** field or use the look up to search by name.	
34.	Click in the **Employee ID** field.	
35.	Enter "**000000842**" into the **Employee ID** field or use the look up to search by name.	
36.	The Employee ID will auto populate the Subject and Employee Name.	
37.	Click in the **Employee Start Time** field.	
38.	Enter "**8:00am**" into the **Employee Start Time** field.	
39.	Click in the **Incident Description** field.	
40.	Enter "**Deborah slipped in a puddle in the hallway and sprained her ankle**" into the **Incident Description** field.	
41.	Click the scrollbar.	
42.	Click the **Occurred on Employer Premises** option.	
43.	Click in the **Judiciary Location** field.	

Step	Action	Notes
44.	Enter "**C01-CTHSE**" into the **Judiciary Location** field.	
45.	Click in the **Exact Location** field.	
46.	Enter "**Hallway**" into the **Exact Location** field.	
47.	Click the **Save** button. Save	
48.	Click the scrollbar.	
49.	Click the **Submit** button. Submit	
50.	The approver will have a status of "Pending" when the form is submitted. If the form is saved and not submitted the status will show as "Not Routed".	
51.	Click the **OK** button. OK	
52.	Click the **Home** link. Home	
53.	Click the **Sign out** link. Sign out	
54.	You have completed the steps for submitting an accident report. **End of Procedure.**	

Management of Time Reporting of Direct Reports

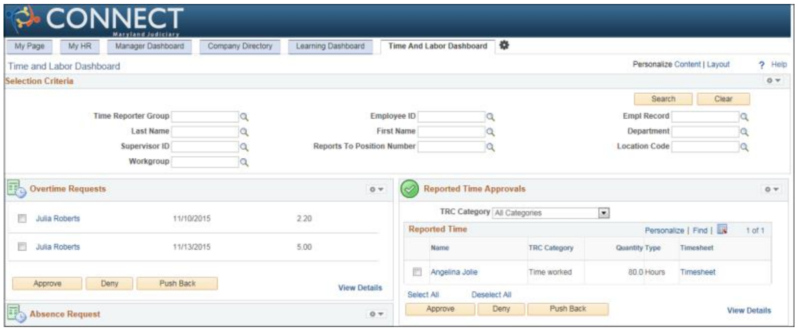
Management of Time Reporting of Direct Reports

During this module you will review topics on:

- Understanding the Time and Labor Dashboard
- Approving a Timesheet from the Time and Labor Dashboard
- Review, Correct, Approve an Elapsed Timesheet
- Review, Correct, Approve a Punch Timesheet
- Approving Overtime Request
- Review Time Management Calendars
- Manager Reports Time on Behalf of Employee

Understanding the Time and Labor Dashboard

The Time and Labor Dashboard allows Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.



Procedure

In this topic, you will review the time and labor dashboard.

Step	Action	Notes
55.	Click the **Time And Labor Dashboard** tab. Time And Labor Dashboard	
56.	The Time and Labor Dashboard is separate from the Manager Dashboard allowing Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.	
57.	When an employee submits an overtime request, leave request, or timesheet, their direct manager will be notified of the approval request via email and/or the Time and Labor Dashboard. **Note:** If the direct manager does ***not*** approve the request prior to payroll processing, all pending requests will be routed to the manager's manager for review and approval.	
58.	Overtime requests and absence requests are displayed on the left side of the page.	
59.	Reported time approvals and schedule deviations are displayed on the right side of the page.	

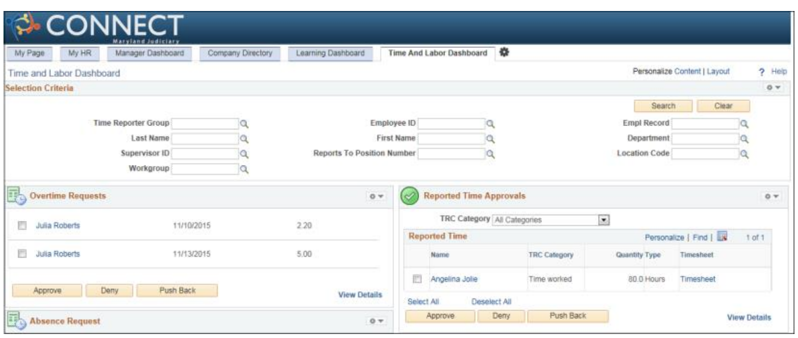
Step	Action	Notes
60.	Notice each approval section gives you the option to approve, deny, or pushback directly from the dashboard. It is recommended however, that you click the employee's name for the desired request to view the request details, then approve, deny, or pushback.	
61.	The Selection Criteria fields allow you to enter specific criteria in order to filter the approval requests displayed on the dashboard.	
62.	Click the **Look up Last Name** button.	
63.	Click the **Jolie** link. Jolie	
64.	Click the **Search** button. Search	
65.	Notice Angelina Jolie is now the only employee displayed on the dashboard.	
66.	Click the **Clear** button to clear the search criteria that was previously entered. Clear	
67.	Click the **Search** button. Search	
68.	Notice that all approval requests are displayed on the dashboard.	
69.	Click the **Julia Roberts** link to view the details of her overtime request. Julia Roberts	
70.	View the request details. From this page, you can approve, deny, or pushback the request.	
71.	For this example, click the **Close (X)** button to close the Overtime Request Details page.	
72.	Click the **Angelina Jolie** link to view the details of her absence request. Angelina Jolie	
73.	View the request details.	
74.	Click the **Vertical** scrollbar to move down the page.	
75.	From this page, you can approve, deny, or pushback the request.	
76.	For this example, click the **Return** button. Return	

Step	Action	Notes
77.	Click the **Angelina Jolie** link to view the details of her timesheet. Angelina Jolie	
78.	By clicking in to the employee's reported time, you have the ability to select all rows of time or individual rows of time to approve, deny, or push back.	
79.	Click the checkbox for the 11/11/2015 row.	
80.	At this point, you can approve, deny, or pushback a single row of time for Angelina.	
81.	Click the **Select All** link to select all rows. Select All	
82.	At this point, you can approve, deny, or push back all rows of time.	
83.	Click the **Deselect All** link to deselect all rows of time. Deselect All	
84.	For this example, click the **Return** button. Return	
85.	If you want to ***submit*** time on behalf of one of your direct reports, you can navigate directly to their timesheet from the dashboard. Click the **Timesheet** link for Angelina. Timesheet	
86.	Click the **Jolie** link. Jolie	
87.	As a manager, you can: 1) Update and submit an employee's time 2) Approve the employee's time once it has been submitted Use the Submit button to submit and the Approve button to approve.	
88.	Click the **Time and Labor Dashboard** menu. Time and Labor Dashboard	
89.	Click the **Vertical** scrollbar to move down the page.	

Step	Action	Notes
90.	The Schedule Deviation graph is an analytical tool that shows the number of scheduled hours, scheduled hours to date, reported hours, approved hours, and the schedule deviation for your employees for the current time period. You can click into the graph or an employee name to view their time.	
91.	You can navigate to previous or future time periods using the left and right arrows.	
92.	Click the **Vertical** scrollbar to move up the page.	
93.	Click the **My Page** tab My Page	
94.	Click the **Sign out** link. **Sign out**	
95.	You have completed the topic "Understanding the Time and Labor Dashboard". **End of Procedure.**	

Approving a Timesheet from the Time and Labor Dashboard

The Time and Labor Dashboard allows Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.



Procedure

In this topic, you will approve a timesheet from the time and labor dashboard.

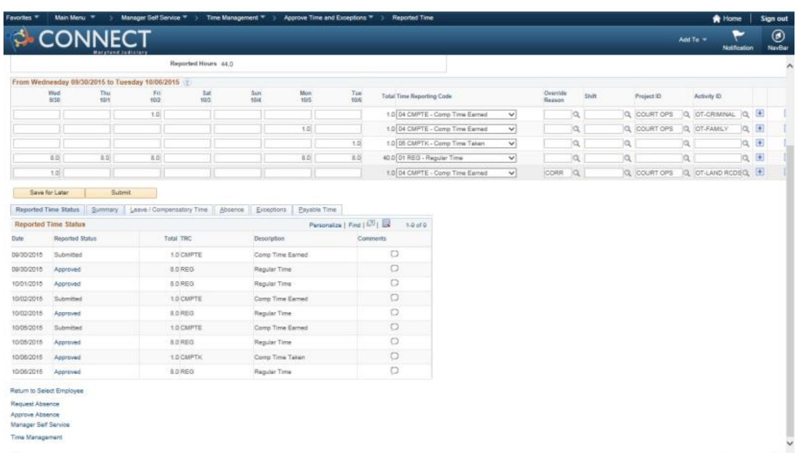
Step	Action	Notes
1.	Click the **Time And Labor Dashboard** tab. Time And Labor Dashboard	

Step	Action	Notes
2.	The Time and Labor Dashboard is separate from the Manager Dashboard allowing Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.	
3.	When an employee submits an overtime request, leave request, or timesheet, their direct manager will be notified of the approval request via email and/or the Time and Labor Dashboard. **Note:** If the direct manager does ***not*** approve the request prior to payroll processing, all pending requests will be routed to the manager's manager for review and approval.	
4.	You can approve, deny, or push back time directly from the Time and Labor Dashboard. However, it is recommended that you view the details of each employee's time before you choose an action.	
5.	Click the **Angelina Jolie** link to view the details of her timesheet. Angelina Jolie	
6.	By clicking in to the employee's reported time, you have the ability to select all rows of time or individual rows of time to approve, deny, or push back.	
7.	Click the checkbox for the 11/11/2015 row.	
8.	At this point, you can approve, deny, or pushback a single row of time for Angelina.	
9.	Click the **Select All** link to select all rows. Select All	
10.	At this point, you can approve, deny, or push back all rows of time.	
11.	Click the **Deselect All** link to deselect all rows of time. Deselect All	
12.	For this example, click the **Return** button. Return	
13.	If you want to ***submit*** time on behalf of one of your direct reports, you can navigate directly to their timesheet from the dashboard. Click the **Timesheet** link for Angelina. Timesheet	

Step	Action	Notes
14.	Click the **Jolie** link. Jolie	
15.	As a manager, you can: 1) Update and submit an employee's time 2) Approve the employee's time once it has been submitted Use the Submit button to submit and the Approve button to approve.	
16.	Click the **Time and Labor Dashboard** menu. Time and Labor Dashboard	
17.	Click the **Sign out** link. Sign out	
18.	You have completed the topic "Approving a Timesheet from the Time and Labor Dashboard". **End of Procedure.**	

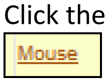
Review, Correct, Approve an Elapsed Timesheet

A Manager has the ability to review, correct, and approve an employee's submitted elapsed timesheet.

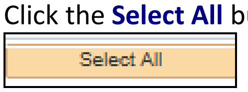
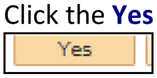
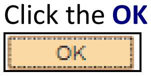
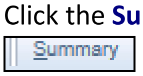
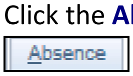


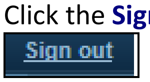
Procedure

In this topic, you will review a direct report's elapsed timesheet, make a correction, and approve the time submitted.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**claire.smearman**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **Approve Time and Exceptions** menu. 	
10.	Click the **Reported Time** menu. 	
11.	Click in the **Selection Criterion Value** field. 	
12.	Enter "**Mouse**" into the **Selection Criterion Value** field.	
13.	Click the **Get Employees** button. 	
14.	Click the **Mouse** link. 	
15.	Prior to approving time, a Manager should review the employee's timesheet to verify its accuracy. Best practice is to request the employee correct the time, however if the Manager must correct the time, they will need to use an override reason code to document the reason for the change. The Comments bubble in the Reported Time Status section can be used for additional information as well.	

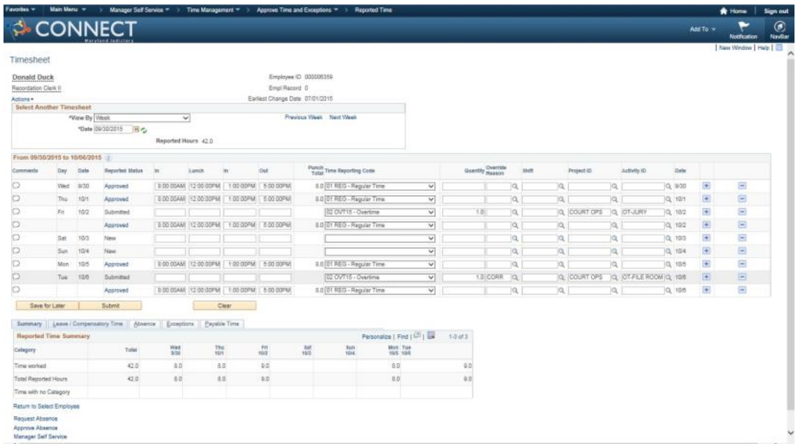
Step	Action	Notes
16.	Click the **Add a new row at row 4** button to make a correction to the employee's timesheet.	
17.	Click in the **Wed** field.	
18.	Enter "**1**" into the **Wed** field.	
19.	Click the **Time Reporting Code** drop-down list.	
20.	Click the **04 CMPTE - Comp Time Earned** list item. 04 CMPTE - Comp Time Earned	
21.	Click the **Look up Override Reason** button.	
22.	Use the Override Reason code to document the reason why the Manager is editing the employee's time. Click the **CORR** link. CORR	
23.	If the overtime is related to a project, the Manager would select a Project and Activity ID. Click the **Look up Project ID** button.	
24.	Click the **COURT OPS** link. COURT OPS	
25.	Click the **Look up Activity ID** button.	
26.	Click the **OT-LAND RCDS** link. OT-LAND RCDS	
27.	Click the **Submit** button to post the correction to the timesheet. Submit	
28.	Click the **Vertical** scrollbar to move down the page.	

Step	Action	Notes
29.	As Manager, you have the option of pushing back the entire timesheet or pushing back only the rows that need to be corrected. In the Reported Time Status section, you can **Select** the individual rows to be pushed back by checking the Select column next to that row or you can click the **Select All** button to push back the entire timesheet.	
30.	**Please note:** If you push back an entire timesheet, you will receive an email notification for **each field** on the timesheet. It is recommended that you **only** push back the row that needs to be corrected. Once you have made your selection, click the **Push Back** button in the Approval section.	
31.	For this example, we are approving the timesheet including the correction. Click the **Select All** button. 	
32.	Click the **Approve** button. 	
33.	Click the **Yes** button. 	
34.	Click the **OK** button. 	
35.	After time has been submitted, you can review the status on the Reported Time Status tab.	
36.	Click the **Summary** tab. 	
37.	The Summary tab summarizes worked overtime and comp time hours by day.	
38.	Click the **Leave / Compensatory Time** tab. 	
39.	Leave and Comp Time balances can be viewed on the Leave/Compensatory Time tab.	
40.	Click the **Absence** tab. 	
41.	Click the **Vertical** scrollbar to move down the page.	

Step	Action	Notes
42.	The Absence tab can be used to launch an absence request. This topic will be explored in more detail in the Absence Management UPKs. All accrued absence balances can be viewed at the bottom of the timesheet page.	
43.	Click the **Exceptions** tab. 	
44.	If an employee has an Exception on their time, it will be shown in the Exceptions tab. For example, an employee that worked more than their normal schedule would have an exception. This is merely a heads up to the Manager and does not affect the time.	
45.	Click the **Home** link. 	
46.	Click the **Sign out** link. 	
47.	You have completed the Review, Correct, Approve an Elapsed Timesheet topic. **End of Procedure.**	

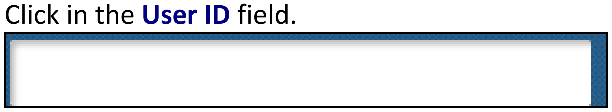
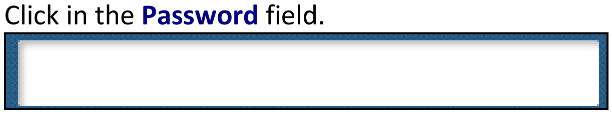
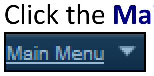
Review, Correct, Approve a Punch Timesheet

A Manager has the ability to review, correct, and approve an employee's submitted punch timesheet.



Procedure

In this topic, you will review a direct report's punch timesheet, make a correction, and approve the time submitted.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**andrew.furletti**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	

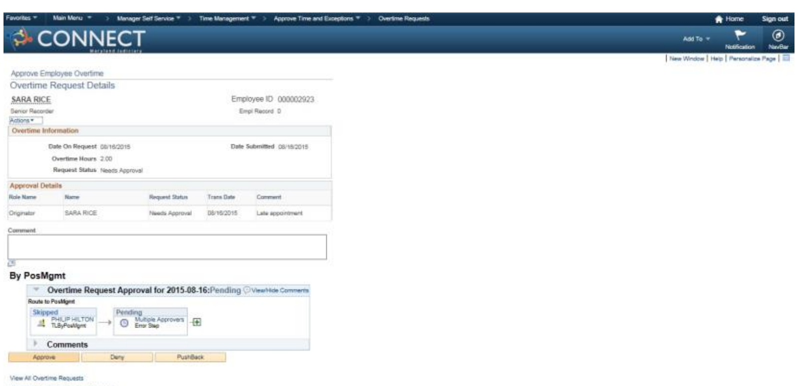
Step	Action	Notes
9.	Click the **Approve Time and Exceptions** menu.	
10.	Click the **Reported Time** menu.	
11.	Click in the **Selection Criterion Value** field.	
12.	Enter "**Duck**" into the **Selection Criterion Value** field.	
13.	Click the **Get Employees** button.	
14.	Click the **Duck** link.	
15.	Prior to approving time, a Manager should review the employee's timesheet to verify its accuracy. Best practice is to request the employee correct the time, however if the Manager must correct the time, they will need to use an override reason code to document the reason for the change. The Comments bubble in Timesheet can be used for additional information as well.	
16.	If the overtime is related to a project, the Manager would select a Project and Activity ID. Click the **Look up Activity ID** button.	
17.	Click the **OT-FILE ROOM** link.	
18.	Click the **Look up Override Reason** button.	
19.	Use the Override Reason code to document the reason why the Manager is editing the employee's time. Click the **CORR** link.	
20.	Click the **Submit** button.	
21.	Click the **OK** button.	

Step	Action	Notes
22.	As Manager, you have the option of pushing back the entire timesheet or pushing back only the rows that need to be corrected. In the Timesheet section, you can **Select** the individual rows to be pushed back by checking the Select column next to that row or you can click the **Select All** button to push back the entire timesheet.	
23.	**Please note:** If you push back an entire timesheet, you will receive an email notification for **each field** on the timesheet. It is recommended that you **only** push back the row that needs to be corrected. Once you have made your selection, click the **Push Back** button in the Approval section.	
24.	Click the **Select All** button. Select All	
25.	Click the **Approve** button. Approve	
26.	Click the **Yes** button. Yes	
27.	Click the **OK** button. OK	
28.	The Summary tab summarizes worked overtime and comp time hours by day.	
29.	Click the **Leave / Compensatory Time** tab. Leave / Compensatory Time	
30.	Leave and Comp Time balances can be viewed on the Leave/Compensatory Time tab.	
31.	Click the **Absence** tab. Absence	
32.	Click the **Vertical** scrollbar to move down the page.	
33.	The Absence tab can be used to launch an absence request. This topic will be explored in more detail in the Absence Management UPKs. All accrued absence balances can be viewed at the bottom of the timesheet page.	

Step	Action	Notes
34.	Click the **Exceptions** tab. Exceptions	
35.	If an employee has an Exception on their time, it will be shown in the Exceptions tab. For example, an employee that worked more than their normal schedule would have an exception. This is merely a heads up to the Manager	
36.	Click the **Home** link. Home	
37.	Click the **Sign out** link. Sign out	
38.	You have completed the Review, Correct, Approve a Punch Timesheet topic. **End of Procedure.**	

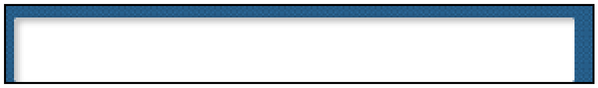
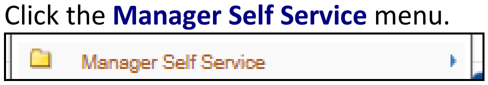
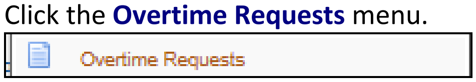
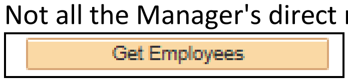
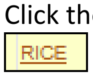
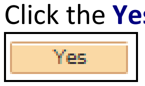
Approving Overtime Request

A Manager has the ability to approve an employee's request for overtime.



Procedure

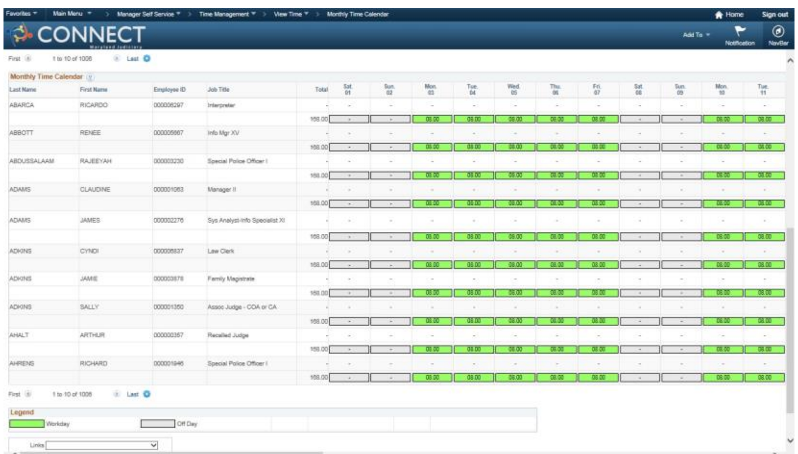
In this topic, we are approving a request to work overtime by an employee.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**dennis.scott**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **Approve Time and Exceptions** menu. 	
10.	Click the **Overtime Requests** menu. 	
11.	For this example, you are approving an overtime request submitted by Sara Rice.	
12.	Click the **Get Employees** button to pull up employees that have already submitted an unapproved overtime request. Not all the Manager's direct reports will appear in this list. 	
13.	Managers have the ability to Approve, Deny, or Push Back an overtime request.	
14.	Click the **RICE** link. 	
15.	Click the **Approve** button. 	
16.	Click the **Yes** button to confirm approval of the overtime request. 	

Step	Action	Notes
17.	Click the **OK** button. 	
18.	Click the **Home** link. 	
19.	Click the **Sign out** link. 	
20.	You have completed the Approving Overtime Request topic. **End of Procedure.**	

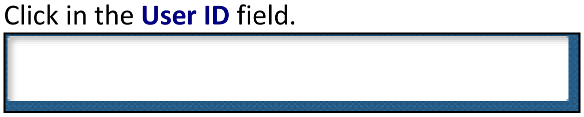
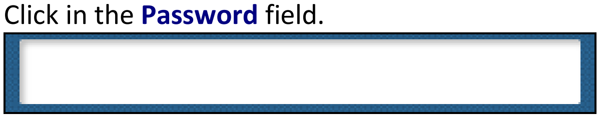
Review Time Management Calendars

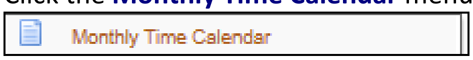
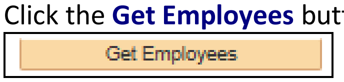
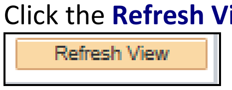
A Manager has the ability to view their direct report's time calendar.



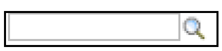
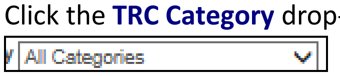
Procedure

This topic is for a Manager to view time reported by direct reports on a daily/weekly/monthly calendar and view time summaries through the Manager dashboard.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "gary.leasure" into the **User ID** field.	
3.	Click in the **Password** field. 	

Step	Action	Notes
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **View Time** menu. 	
10.	Click the **Monthly Time Calendar** menu. 	
11.	Click the **Get Employees** button. 	
12.	Click the **Collapse section Employee Selection** link to close this section. 	
13.	After clicking the Get Employees button, you will be able to view all of your employees in the results grid.	
14.	Using the **Display Options** section, you can pull in additional information such as Holidays, Planned Overtime, Absences, and Exceptions. Click the **Show Absences, Show Holidays, Show Planned Overtime, and Show Exceptions** options.	
15.	Click the **Refresh View** button. 	
16.	Click the **Vertical Scrollbar** to scroll down the page.	
17.	The **Legend** section indicates the colors represented for each type of time. Press **[Enter]** to continue.	
18.	Click the **Vertical Scrollbar** to scroll back up the page.	

Step	Action	Notes
19.	Notice the current view is for the month of August. You can change the view to weekly or daily. Click the **Weekly Time Calendar** link. Weekly Time Calendar	
20.	Click the **Get Employees** button. Get Employees	
21.	Click the **Collapse section Employee Selection** link to close this section.	
22.	Notice the current view is for the week beginning Monday 7/27/2015 through Saturday 8/1/2015. You can change the week by clicking on the calendar button.	
23.	Click the **Daily Time Calendar** link. Daily Time Calendar	
24.	Click the **Get Employees** button. Get Employees	
25.	Click the **Collapse section Employee Selection** link to close this section.	
26.	Notice the Elapsed column reflects the total number of hours worked for a day.	
27.	The daily schedules reflected below reflect Punch time employees.	
28.	Click the **Expand section Employee Selection** link to open this section.	
29.	Managers can also view a single employee's daily/weekly/monthly schedule. Click the **Weekly Time Calendar** link. Weekly Time Calendar	
30.	Click in the **Selection Criterion Value** field.	
31.	Enter "**00002276**" into the **Selection Criterion Value** field.	
32.	Click the **Get Employees** button. Get Employees	

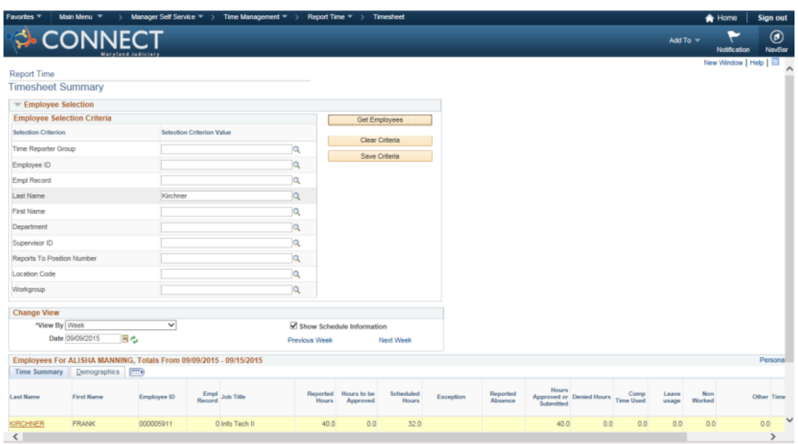
Step	Action	Notes
33.	Click the **Vertical Scrollbar** to scroll down the page.	
34.	The weekly schedule for James Adams is visible. Press **[Enter]** to continue.	
35.	Managers can also view Time and Labor activities through the Time and Labor Dashboard. Click the **Time Management** button. 	
36.	Click the **Time and Labor Dashboard** menu. 	
37.	The Time and Labor Dashboard presents a snapshot of Manager activities related to Time and Labor including pending Overtime Requests, approvals for Time Worked, and a time summary comparison bar chart titled Schedule Deviation.	
38.	Managers can also view a single employee's Time and Labor activity. For this example, we will search for employee Matthew Lamp. Click in the **Last Name** field. 	
39.	Enter "**Lamp**" into the **Last Name** field.	
40.	Click the **Search** button. The Time and Labor Dashboard will only display Time and Labor information for Matthew Lamp. 	
41.	Click the **TRC Category** drop-down list. 	
42.	The TRC Category can be changed to any of the options shown below. Click the **All Categories** list item. 	
43.	Managers have the ability to Approve, Deny, or Push Back an employee's time approval from the Time and Labor Dashboard.	
44.	Click the **Vertical Scrollbar** to scroll down the page.	

Step	Action	Notes
45.	The bar chart in the Schedule Deviation section is a visual display of the Summary section. Click Enter to continue.	
46.	Click the **Home** link.  	
47.	Click the **Sign out** link.  	
48.	You have completed the Review Time Management Calendars topic. **End of Procedure.**	

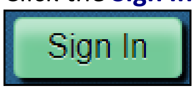
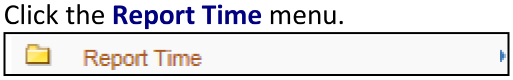
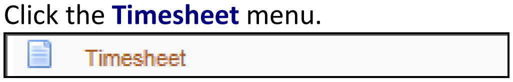
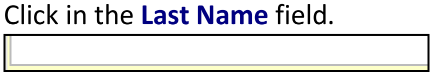
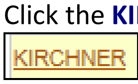
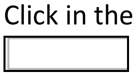
Manager Reports Time on Behalf of Employee

Manager Reports Time on Behalf of Employee

In this topic we demonstrate how to navigate and access an employee's timesheet, and report time on their behalf.



Procedure

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**alisha.manning**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **Report Time** menu. 	
10.	Click the **Timesheet** menu. 	
11.	Click in the **Last Name** field. 	
12.	Enter "**Kirchner**" into the **Last Name** field.	
13.	Click the **Get Employees** button. 	
14.	Click the **KIRCHNER** link. 	
15.	Click in the **Wed In** field. 	
16.	Enter "**8:00AM**" into the **Wed In** field.	
17.	Click in the **Wed Lunch** field. 	
18.	Enter "**12:00PM**" into the **Wed Lunch** field.	

Step	Action	Notes
19.	Click in the **Wed In** field.	
20.	Enter "**12:30PM**" into the **Wed In** field.	
21.	Click in the **Wed Out** field.	
22.	Enter "**4:30PM**" into the **Wed Out** field.	
23.	Click the **Time Reporting Code** drop-down list.	
24.	Click the **01 REG - Regular Time** list item. 01 REG - Regular Time	
25.	Click in the **Thu In** field.	
26.	Enter "**8:00AM**" into the **Thu In** field.	
27.	Click in the **Thu Lunch** field.	
28.	Enter "**12:00PM**" into the **Thu Lunch** field.	
29.	Click in the **Thu In** field.	
30.	Enter "**12:30PM**" into the **Thu In** field.	
31.	Click in the **Thu Out** field.	
32.	Enter "**4:30PM**" into the **Thu Out** field.	
33.	Click the **Time Reporting Code** drop-down list.	
34.	Click the **01 REG - Regular Time** list item. 01 REG - Regular Time	
35.	Click in the **Fri In** field.	
36.	Enter "**7:30AM**" into the **Fri In** field.	
37.	Click in the **Fri Lunch** field.	
38.	Enter "**11:30AM**" into the **Fri Lunch** field.	
39.	Click in the **Fri In** field.	
40.	Enter "**12:00PM**" into the **Fri In** field.	

Step	Action	Notes
41.	Click in the **Fri Out** field.	
42.	Enter "**4:00PM**" into the **Fri Out** field.	
43.	Click the **Time Reporting Code** drop-down list.	
44.	Click the **01 REG - Regular Time** list item.	
45.	Click in the **Mon In** field.	
46.	Enter "**7:30AM**" into the **Mon In** field.	
47.	Click in the **Mon Lunch** field.	
48.	Enter "**11:30AM**" into the **Mon Lunch** field.	
49.	Click in the **Mon In** field.	
50.	Enter "**12:00PM**" into the **Mon In** field.	
51.	Click in the **Mon Out** field.	
52.	Enter "**4:00PM**" into the **Mon Out** field.	
53.	Click the **Time Reporting Code** drop-down list.	
54.	Click the **01 REG - Regular Time** list item.	
55.	Click in the **Tue In** field.	
56.	Enter "**8:00AM**" into the **Tue In** field.	
57.	Click in the **Tue Lunch** field.	
58.	Enter "**12:00PM**" into the **Tue Lunch** field.	
59.	Click in the **Tue In** field.	
60.	Enter "**12:30PM**" into the **Tue In** field.	
61.	Click in the **Tue Out** field.	
62.	Enter "**4:30PM**" into the **Tue Out** field.	

Step	Action	Notes
63.	Click the **Time Reporting Code** drop-down list.	
64.	Click the **01 REG - Regular Time** list item. 01 REG - Regular Time	
65.	Click the **Submit** button. Submit	
66.	Click the **OK** button. OK	
67.	Click the **OK** button. OK	
68.	Click the **Home** link. Home	
69.	Click the **Sign out** link. Sign out	
70.	**End of Procedure.**	

Absence Management of Direct Reports

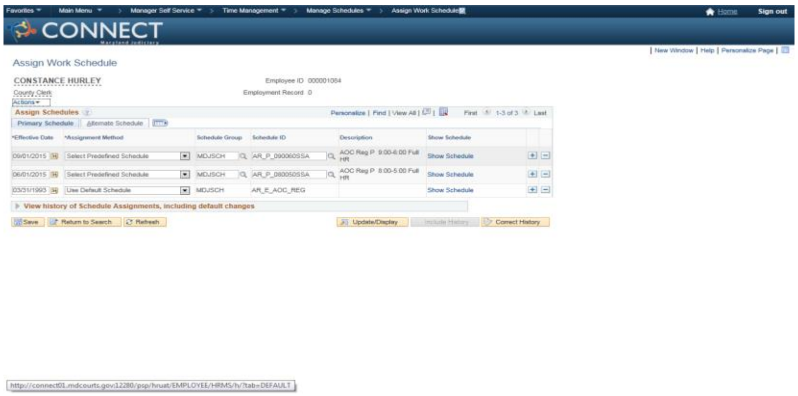
Absence Management

During this module you will review topics on:

- Assign Work Schedule
- Request Time-off with Balance Forecasting on Behalf of Employee
- Request Time-off without Balance Forecasting on Behalf of Employee
- Request Time-off on behalf of Employee - Insufficient Balance
- Manager Requests Absence via Employee's Timesheet
- Modify Employee Absence Request from Timesheet
- Review Direct Report Absence Balances
- Review Direct Report Absence History
- Approve Direct Report Absence Request
- Deny Direct Report Absence Request
- Approve Direct Report Extended Absence Request - FMLA Take
- Canceling Absence Request from Employee's Timesheet

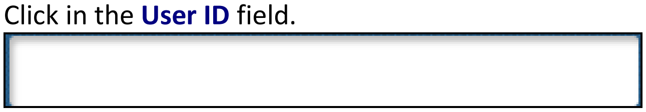
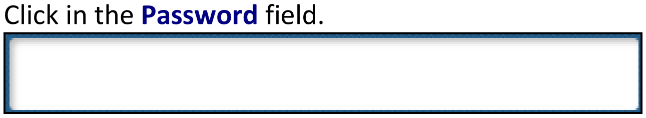
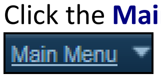
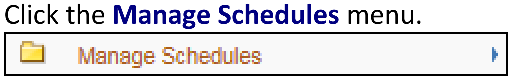
Assign Work Schedule

Manager assigns a specific work schedule to employees.



Procedure

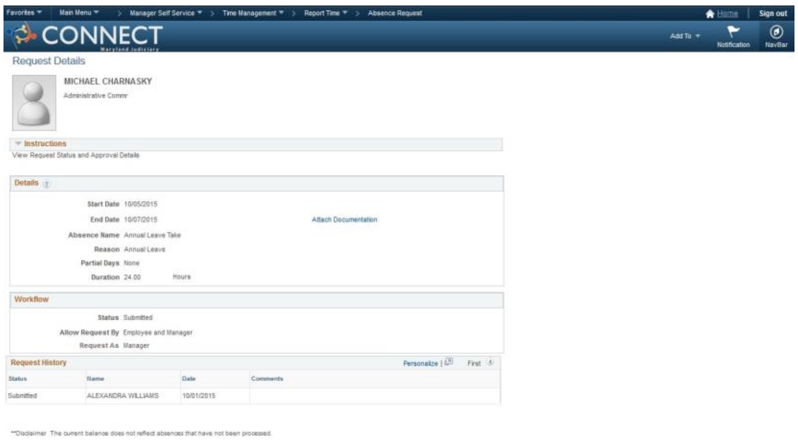
In this topic, the Manager will assign a work schedule to a direct report.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**carol.llewellyn-jones**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **Manage Schedules** menu. 	

Step	Action	Notes
10.	Click the **Assign Work Schedule** menu. Assign Work Schedule	
11.	Enter "**000001084**" into the **Empl ID** field.	
12.	Click the **Search** button. Search	
13.	The Assign Work Schedule page displays a history of an employee's current and past schedules.	
14.	When adding a new row **ALWAYS** click the add a new row button on the **first row**. Click the **Add a new row** link. +	
15.	When adding a new row the Effective Date will automatically default to the current date. Double click in the **Effective Date** field. 08/31/2015	
16.	To clear the field, Press **[Backspace]**.	
17.	Enter "**09/01/2015**" into the **Effective Date** field.	
18.	Double click in the **Schedule ID** field. AR_P_080050SSA	
19.	Enter "**AR_P_090060SSA**" into the **Schedule ID** field.	
20.	Click the **Save** button. Save	
21.	After saving, a brief Description of the schedule is displayed. You may also click on the Show Schedule link to view the weekly schedule.	
22.	Click the **Home** link. Home	
23.	Click the **Sign out** link. Sign out	
24.	You have completed the Assign Work schedule topic. **End of Procedure.**	

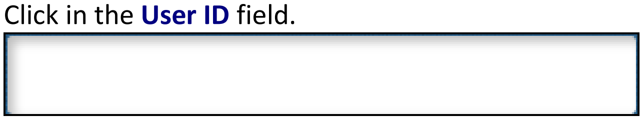
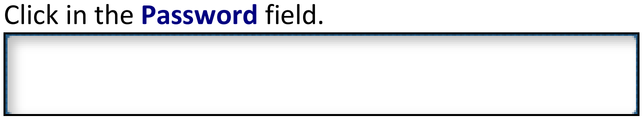
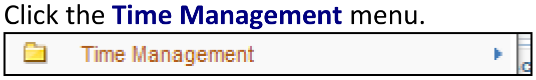
Request Time-off with Balance Forecasting on Behalf of Employee

A Manager can request time off on behalf of an employee including forecast their absence balance.



Procedure

In this topic, you will request time off with balance forecasting on behalf of an employee.

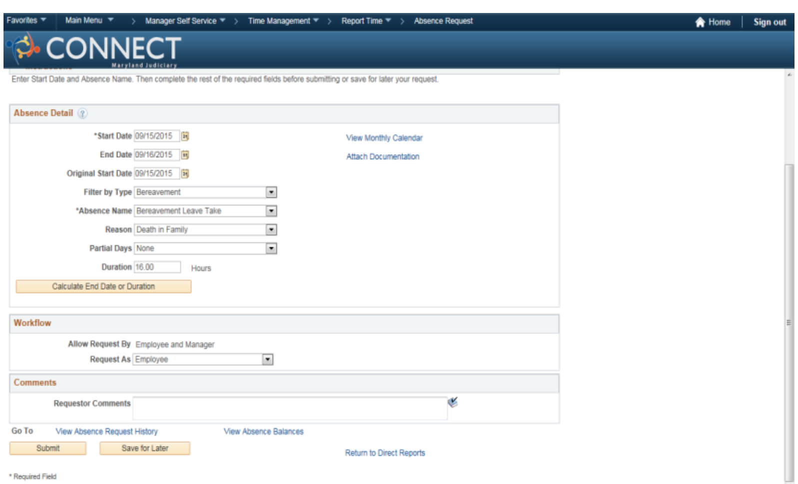
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**alexandra.williams**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click in the **Main Menu** field. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	

Step	Action	Notes
9.	Click the **Report Time** menu. Report Time	
10.	Click the **Absence Request** menu. Absence Request	
11.	The Request Absence page will give the Manager a listing of their direct reports.	
12.	Click the **Select** button for MICHAEL CHARNASKY. Select	
13.	Click the **Start Date Calendar** button.	
14.	Click the **"5"** as the desired date. 5	
15.	Click the **Filter by Type** drop-down list. All	
16.	Click the **Annual Leave** list item. Annual Leave	
17.	Click the **Absence Name** drop-down list. Select Absence Name	
18.	Click the **Annual Leave Take** list item. Annual Leave Take	
19.	Click the **Reason** drop-down list. Select Absence Reason	
20.	Click the **Annual Leave** list item. Annual Leave	
21.	Depending on the Absence Name selected, the Current Available Balance for the Absence Name will be displayed. For example, Accident Leave Take, which does not accrue time, will not display a current available balance.	
22.	Click in the **Duration** field.	
23.	Enter "**24**" into the **Duration** field.	
24.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
25.	The End Date automatically populates the last date of the absence request based on the hours of Duration.	

Step	Action	Notes
26.	Click the **Forecast Balance** button. Forecast Balance	
27.	This message is confirming the employee has enough leave to submit the absence request.	
28.	Click the **Vertical** scrollbar to move down the page.	
29.	Notice the Request As field in the Workflow section is already set to Manager.	
30.	Click the **Submit** button. Submit	
31.	Click the **Yes** button. Yes	
32.	Click the **OK** button. OK	
33.	After submission, the Request History section shows the absence request was Submitted by the Manager, Alexandra Williams.	
34.	Click the **Home** link. Home	
35.	Click the **Sign out** link. Sign out	
36.	You have completed the Request Time Off with Balance Forecasting on Behalf of Employee topic. **End of Procedure.**	

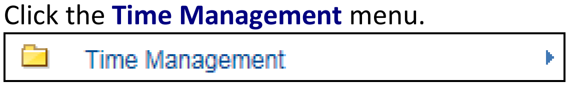
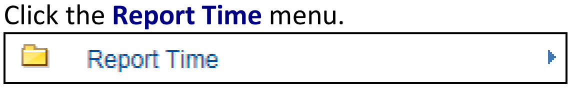
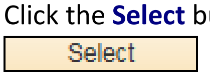
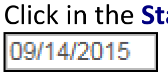
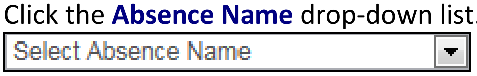
Request Time-off without Balance Forecasting on Behalf of Employee

Manager can request time-off without balance forecasting on behalf of an Employee.



Procedure

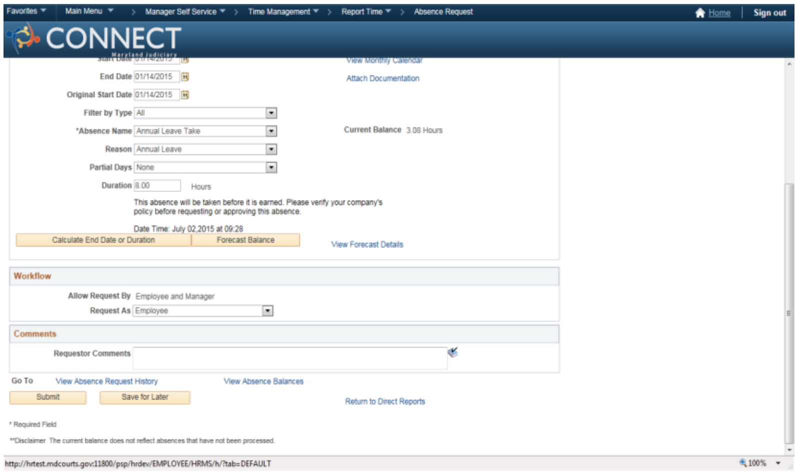
In this topic, you will request time off without balance forecasting on behalf of an employee.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**alexandra.williams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **Report Time** menu. 	
10.	Click the **Absence Request** menu. 	
11.	Click the **Select** button for Michael Charnasky. 	
12.	Click in the **Start Date** field. 	
13.	To clear the field Press **[Backspace]**.	
14.	Enter "**09/15/2015**" into the **Start Date** field.	
15.	Click the **Filter by Type** drop-down list. 	
16.	Click the **Bereavement** list item. 	
17.	Click the **Absence Name** drop-down list. 	

Step	Action	Notes
18.	Click the **Bereavement Leave Take** list item. Bereavement Leave Take	
19.	Click the **Reason** drop-down list. Select Absence Reason	
20.	Click the **Death in Family** list item. Death in Family	
21.	Click in the **Duration** field.	
22.	Enter "**16**" into the **Duration** field.	
23.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
24.	Click the **Vertical** scrollbar to move down the page.	
25.	Click the **Submit** button. Submit	
26.	Click the **Yes** button. Yes	
27.	Click the **OK** button. OK	
28.	Click the **Home** link. Home	
29.	Click the **Sign out** link. Sign out	
30.	You have completed the Request time off with balance forecasting on behalf of an employee topic. **End of Procedure.**	

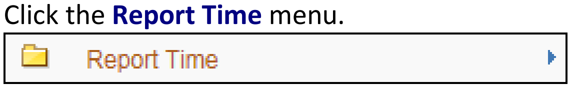
Request Time-off on behalf of Employee - Insufficient Balance

Manager can request time off on behalf of Employee with an insufficient balance.



Procedure

In this topic, you will request time off on behalf of Employee with an insufficient leave balance.

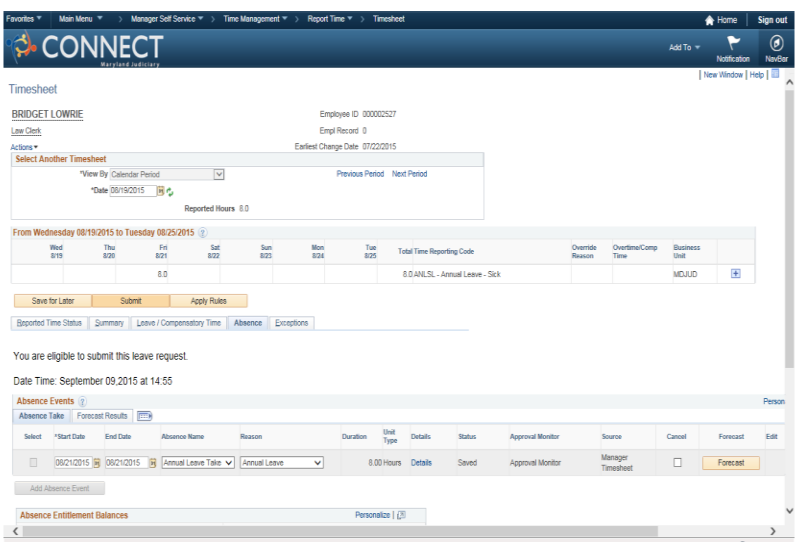
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**dennis.scott**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **Report Time** menu. 	
10.	Click the **Absence Request** menu. 	

Step	Action	Notes
11.	The Request Absence page will give the Manager a listing of their direct reports.	
12.	Click the **Select** button for MARTI ROBINSON. Select	
13.	Click the **Choose a date** button. 31	
14.	Click the **Calendar Month** drop-down list. July	
15.	Click the **January** list item. January	
16.	Click the desired date. 14	
17.	Click the **Absence Name** drop-down list. Select Absence Name	
18.	Click the **Annual Leave Take** list item. Annual Leave Take	
19.	Click the **Reason** drop-down list. Select Absence Reason	
20.	Click the **Annual Leave** list item. Annual Leave	
21.	Depending on the Absence Name selected, the Current Available Balance for the Absence Name will be displayed.	
22.	Click in the **Duration** field.	
23.	Enter "**8**" into the **Duration** field.	
24.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
25.	The End Date automatically populates the last date of the absence request based on the hours of Duration.	
26.	Click the **Forecast Balance** button. Forecast Balance	
27.	This message is confirming the employee does **not** have enough leave to submit the absence request.	
28.	Click the **View Forecast Details** link. View Forecast Details	

Step	Action	Notes
29.	The Absence Forecast Results page displays the details of why the employee is ineligible to take leave and also provides their current available balance. Click the **Return to Absence Request** link. Return to Absence Request	
30.	Click the **Home** link. Home	
31.	Click the **No** button since the request was not successful due to the insufficient balance. No	
32.	Click the **Sign out** link. Sign out	
33.	You have completed the Request Time Off on Behalf of Employee - Insufficient Balance topic. **End of Procedure.**	

Manager Requests Absence via Employee's Timesheet

Manager can request an absence through the Employee's Timesheet



Procedure

In this topic, the Manager will request an absence through the Employee's Timesheet.

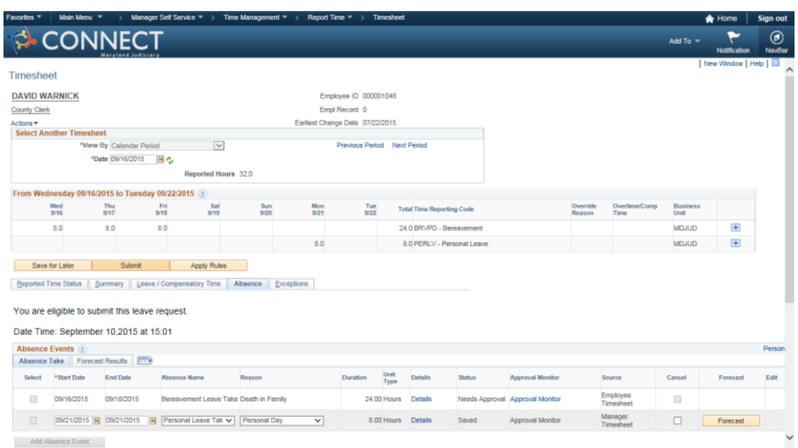
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**gerald.purnell**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Time Management** menu. Time Management	
9.	Click the **Report Time** menu. Report Time	
10.	Click the **Timesheet** menu. Timesheet	
11.	Click in the **Last Name** field.	
12.	Enter "**Lowrie**" into the **Last Name** field.	
13.	Click the **Get Employees** button. Get Employees	
14.	Click the **LOWRIE** link. LOWRIE	
15.	Click the **Choose a date** button.	
16.	Click the **Calendar Month** drop-down list. September	
17.	Click the **August** list item. August	

Step	Action	Notes
18.	Click the desired date. 19	
19.	Click the **Refresh Timesheet** button.	
20.	Click the **Absence** tab. Absence	
21.	Click the **Add Absence Event** button. Add Absence Event	
22.	Click the **Choose a date** button.	
23.	Click **"21"** as the desired date. 21	
24.	Click the **Absence Name** drop-down list. Select Absence Nar	
25.	Click the **Annual Leave Take** list item. Annual Leave Take	
26.	Click the **Reason** drop-down list. Select Absence Reasor	
27.	Click the **Annual Leave** list item. Annual Leave	
28.	Click the **Details** link. Details	
29.	Click the **Calculate End Date or Duration** button. Calculate End Date or Duration	
30.	The End Date automatically populates the last date of the absence request based on the hours of Duration.	
31.	Click the **OK** button. OK	
32.	Click the **Forecast** button. Forecast	
33.	This message is confirming the employee has enough leave to submit the absence request.	
34.	Click the **Submit** button. Submit	

Step	Action	Notes
35.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. OK	
36.	Click the **OK** button. OK	
37.	After submission, the Status of the absence request is Needs Approval.	
38.	Click the **Home** link. Home	
39.	Click the **Sign out** link. Sign out	
40.	You have completed the Manager Request an absence via the Employee's Timesheet topic. **End of Procedure.**	

Modify Employee Absence Request from Timesheet

Modify Employee Absence Request from Timesheet

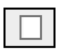
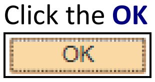
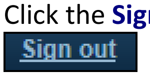


Procedure

In this topic, you will modify an employee's absence request on their behalf from their timesheet.

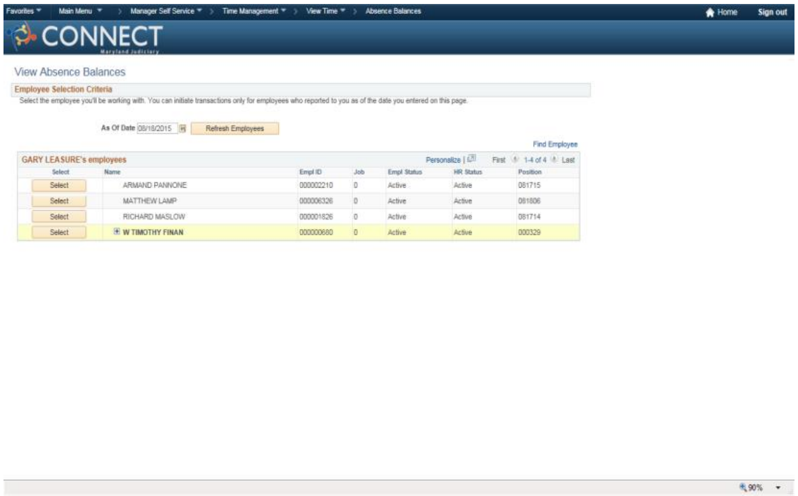
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Time Management** menu. Time Management	
9.	Click the **Report Time** menu. Report Time	
10.	Click the **Timesheet** menu. Timesheet	
11.	Click in the **Selection Criterion Value** field for Last Name.	
12.	Enter "**Warnick**" into the **Selection Criterion Value** field.	
13.	Click the **Get Employees** button. Get Employees	
14.	Click the **WARNICK** link. WARNICK	
15.	Click the **Choose a date** button.	
16.	Click **"16"** as the desired date. 16	
17.	Click the **Refresh Timesheet** button.	

Step	Action	Notes
18.	Notice the leave requested on the Timesheet for the week of 9/16 is also listed in the Reported Time Status section.	
19.	Click the **Absence** tab. Absence	
20.	Click the **Horizontal Scrollbar** to scroll to the right of the page.	
21.	Click the **Edit** button. Edit	
22.	Click the **Choose a date** button.	
23.	Click **"21"** as the desired date. 21	
24.	Click the **Absence Name** drop-down list. Annual Leave Take	
25.	Click the **Personal Leave Take** list item. Personal Leave Take	
26.	This message is alerting you that a change was made to the absence request. Click the **Yes** button. Yes	
27.	Click the **Reason** drop-down list. Select Absence Reasor	
28.	Click the **Personal Day** list item. Personal Day	
29.	Click the **Forecast** button. Forecast	
30.	Click the **Yes** button. Yes	
31.	This message is confirming the employee has enough leave to submit the absence request.	
32.	Click the **Submit** button to make the changes to the absence request. Submit	
33.	To acknowledge documentation may be required, Click the **OK** button. OK	

Step	Action	Notes
34.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. 	
35.	Click the **OK** button. 	
36.	After submitting the changes, the modified absence request is displayed on the Timesheet page. Click the **Select** option. 	
37.	Click the **Approve** button. 	
38.	Click the **Yes** button to approve. 	
39.	Click the **OK** button. 	
40.	After resubmitting and approving the modified absence request, the Status is now Approved.	
41.	Click the **Home** link. 	
42.	Click the **Sign out** link. 	
43.	You have just completed the, Modify Employee Absence Request from the Timesheet topic. **End of Procedure.**	

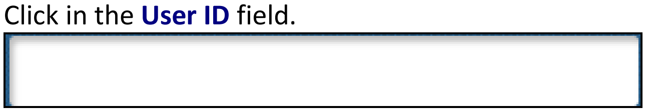
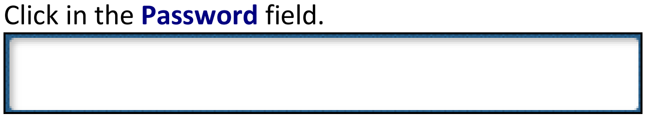
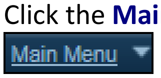
Review Direct Report Absence Balances

Review Direct Report Absence Balances



Procedure

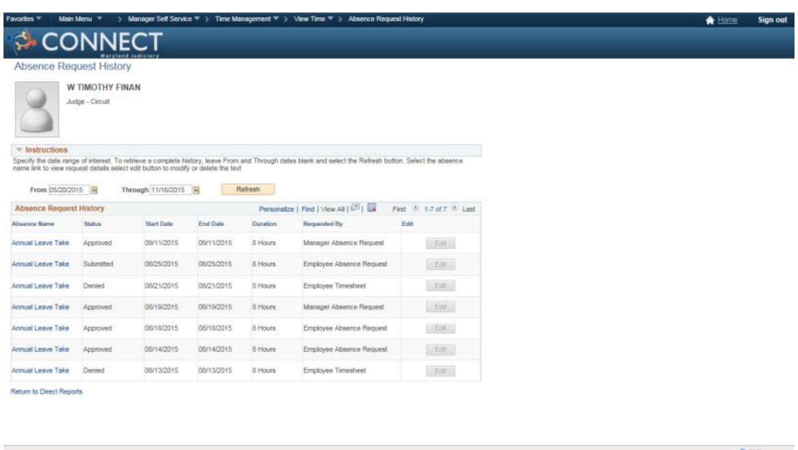
In this topic, you will review a direct report absence balance.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**gary.leasure**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	

Step	Action	Notes
8.	Click the **Time Management** menu. Time Management	
9.	Click the **View Time** menu. View Time	
10.	Click the **Absence Balances** menu. Absence Balances	
11.	Click the **Select** button. Select	
12.	Review the Direct Report Absence Balances.	
13.	Click the **Home** link. Home	
14.	Click the **Sign out** link. Sign out	
15.	You have just completed the Review Direct Report Absence Balances topic. **End of Procedure.**	

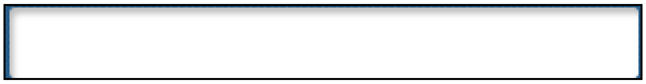
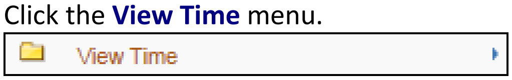
Review Direct Report Absence History

Review Direct Report Absence History



Procedure

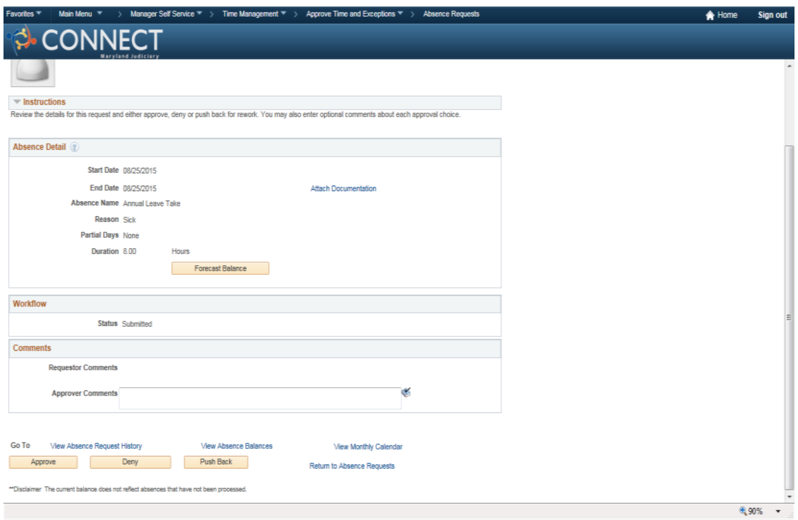
In this topic, you will review a direct report's absence history.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**gary.leasure**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **View Time** menu. 	
10.	Click the **Absence Request History** menu. 	
11.	The Absence Request History page will display a listing of the Manager's direct reports.	
12.	Click the **Select** button for W TIMOTHY FINAN. 	
13.	Review the Direct Report Absence History including Absence Name, Status, Dates, Duration, and who submitted the absence request in the Requested By column.	
14.	Notice the From and Through date fields. You can specify any date range you desire or leave the fields blank to display a complete history. If you change the dates, click the Refresh button to update the display.	
15.	Click the **Home** link. 	

Step	Action	Notes
16.	Click the **Sign out** link.  	
17.	You have completed the, Review Direct Report Absence History topic. **End of Procedure.**	

Approve Direct Report Absence Request

Approve Direct Report Absence Request



Procedure

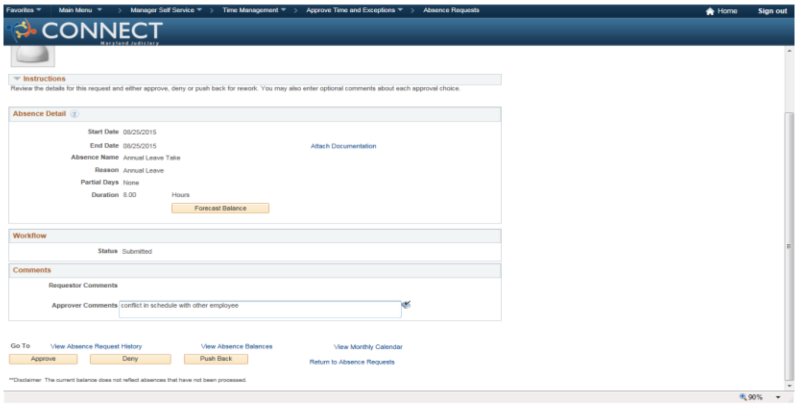
In this topic, you will approve an absence request for a direct report.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**gary.leasure**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.  	

Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Time Management** menu. Time Management	
9.	Click the **Approve Time and Exceptions** menu. Approve Time and Exceptions	
10.	Click the **Absence Requests** menu. Absence Requests	
11.	The Absence Requests page automatically defaults to show requests that are Pending approval. You can change the view to Approved or Denied requests by clicking the drop down menu then clicking the Refresh button.	
12.	Click the **W TIMOTHY FINAN** link to view the details of the absence request. W TIMOTHY FINAN	
13.	Click the **Vertical** scrollbar to move down the page.	
14.	Click the **Approve** button. Approve	
15.	Click the **Yes** button to approve. Yes	
16.	Click the **OK** button. OK	
17.	Click the **Home** link. Home	
18.	Click the **Sign out** link. Sign out	
19.	You have completed the Approve Direct Report Absence Request topic. **End of Procedure.**	

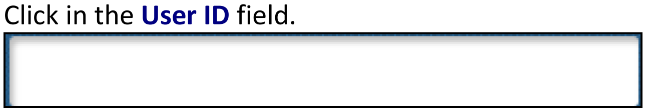
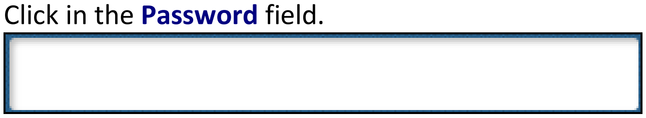
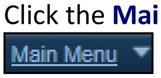
Deny Direct Report Absence Request

Deny Direct Report Absence Request



Procedure

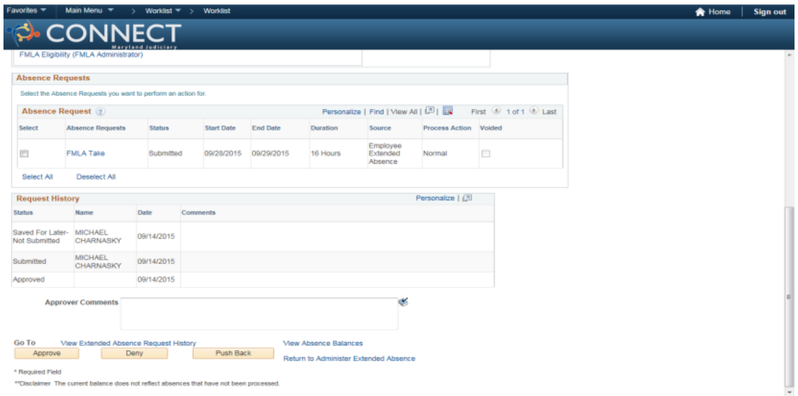
In this topic, you will deny an absence request for a direct report.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**alisha.manning**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Time Management** menu. 	
9.	Click the **Approve Time and Exceptions** menu. 	

Step	Action	Notes
10.	Click the **Absence Requests** menu. Absence Requests	
11.	The Absence Requests page automatically defaults to show requests that are Pending approval. You can change the view to Approved or Denied requests by clicking the drop down menu then clicking the Refresh button.	
12.	Click the **ALTON HUBBARD** link to view the details of the absence request. ALTON HUBBARD	
13.	Click the **Vertical** scrollbar to move down the page.	
14.	Click in the **Approver Comments** field.	
15.	Enter "**conflict in schedule with other employee**" into the **Approver Comments** field.	
16.	Click the **Deny** button. Deny	
17.	Click the **Yes** button to deny the request. Yes	
18.	Click the **OK** button. OK	
19.	Click the **Home** link. Home	
20.	Click the **Sign out** link. Sign out	
21.	You have completed the Deny Direct Report Absence Request topic. **End of Procedure.**	

Approve Direct Report Extended Absence Request - FMLA Take

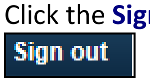
Approve Direct Report Extended Absence Request - FMLA Take



Procedure

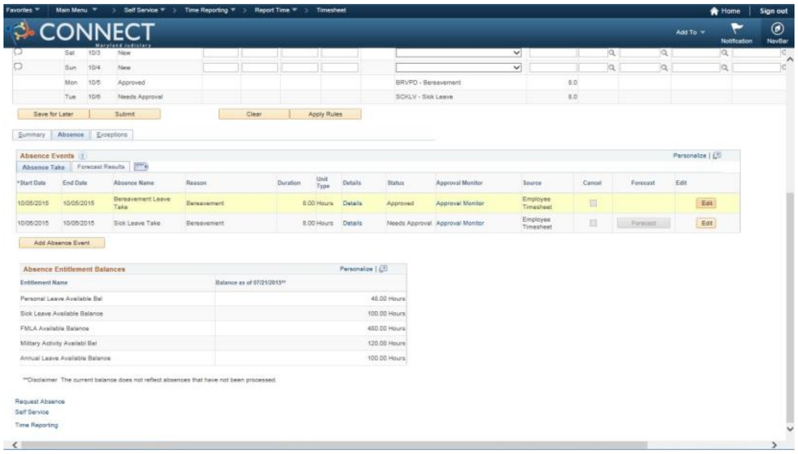
In this topic, you will approve an FMLA take extended absence request for a direct report.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**alexandra.williams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Worklist** menu. Worklist	
8.	Click the **Worklist** menu. Worklist	
9.	To sort the worklist items, Click the **Date From** column header. Date From	

Step	Action	Notes
10.	To sort the worklist items, Click the **Date From** column header 2 times. The most recent worklist item will be first. 	
11.	Click the **AM_Extended_Abs** link for Charnasky, Michael S.	
12.	Click the **Vertical** scrollbar to move down the page.	
13.	The Absence Request section displays the details of the employee's FMLA extended absence request. Click the **Select** checkbox for FMLA Take. 	
14.	Click the **Approve** button. 	
15.	Click the **Yes** button to approve. 	
16.	Click the **OK** button. 	
17.	Click the **Home** link. 	
18.	Click the **Sign out** link. 	
19.	You have completed the Approve Direct Report Extended Absence Request - FMLA Take topic. **End of Procedure.**	

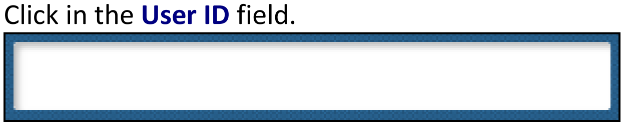
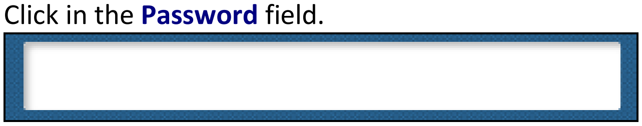
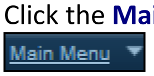
Canceling Absence Request from Employee's Timesheet

A Manager has the ability to cancel an employee's absence request from the employee's timesheet page.

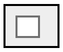
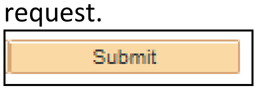
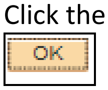


Procedure

In this topic, you will cancel absence requests posted on a direct report's timesheet. One absence has already been approved, another absence will be pending approval.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**liam.nielson**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	

Step	Action	Notes
8.	Click the **Time Management** menu. Time Management	
9.	Click the **Report Time** menu. Report Time	
10.	Click the **Timesheet** menu. Timesheet	
11.	Click in the **Selection Criterion Value** field for Last Name.	
12.	Enter "**Duck**" into the **Selection Criterion Value** field.	
13.	Click the **Get Employees** button. Get Employees	
14.	Click the **Duck** link. Duck	
15.	Your direct report Donald Duck is using a punch timesheet.	
16.	Click the **Absence** tab. Absence	
17.	Click the **Vertical** scrollbar to move down the page.	
18.	Click the **Edit** button for the Approved absence. Edit	
19.	Click the **Cancel** option.	
20.	Click the **Submit** button to make the change to the absence request. Submit	
21.	To acknowledge documentation may be required, Click the **OK** button. OK	
22.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. OK	
23.	Click the **OK** button. OK	
24.	Click the **Vertical** scrollbar to move down the page.	

Step	Action	Notes
25.	Notice the Approved absence has been removed from the Absence Events section. Click the **Edit** button for the pending absence. 	
26.	Click the **Cancel** option. 	
27.	Click the **Submit** button to make the change to the absence request. 	
28.	To acknowledge documentation may be required, Click the **OK** button. 	
29.	This message is alerting you to certify the reported time is accurate. Click the **OK** button. 	
30.	Click the **OK** button. 	
31.	Both absences have been removed from the employee's Absence Events section.	
32.	Click the **Home** link. 	
33.	Click the **Sign out** link. 	
34.	You have completed the Canceling Absence Request from Employee's Timesheet topic. **End of Procedure.**	

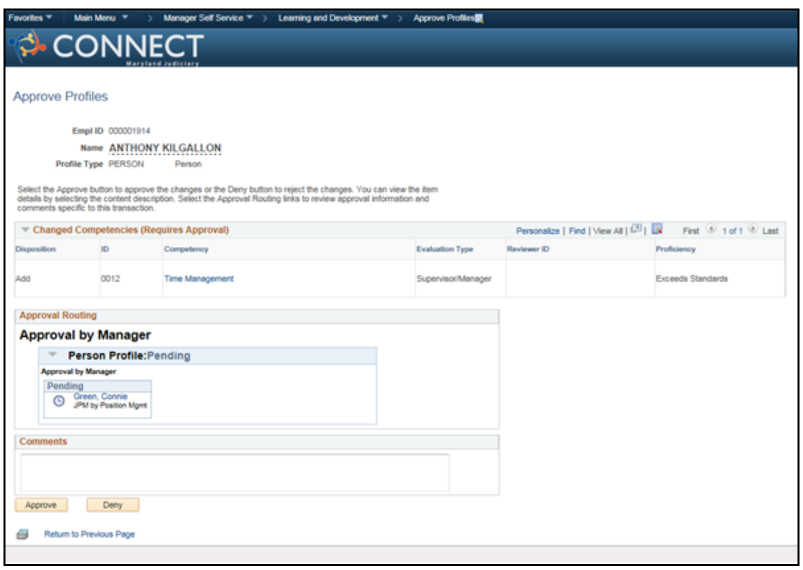
Employee Profile Management

During this module you will review topics on:

- Approve & Deny Person Profile Updates
- Updating Team Member Profiles
- Compare Employee Profile to Current Job
- Copy Employee Profile from Job Profile
- Add Financial Disclosure to Team Member's Profile
- Find Similar People on Your Team
- Find Team Members for a Specific Job Profile
- View Team Member's Historical Profile
- View Team Interest Lists

Approve & Deny Person Profile Updates

Employees can update their personal profile (competencies, certifications, education) through Self-Service. Each update must be reviewed and either approved or denied by the manager.



Procedure

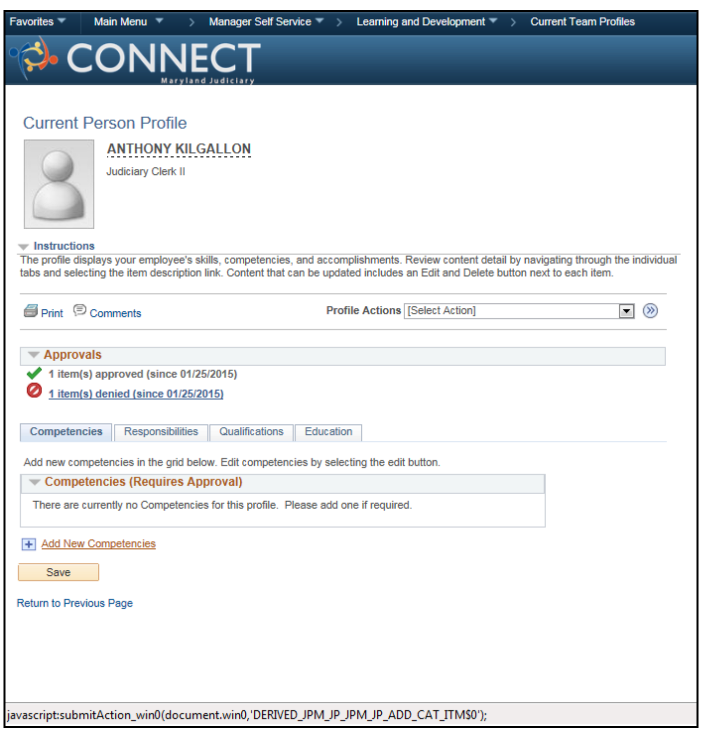
In this topic, you will approve and deny two profile updates from your one of your direct reports.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Approve Profiles** menu. Approve Profiles	
10.	The Approval Transactions box displays the profile updates from your direct report(s) that require your approval. The workflow status willl indicate if the request is Pending, Approved or Denied.	
11.	Click the **ANTHONY KILGALLON** link for the first approval. ANTHONY KILGALLON	
12.	In the **Approve Profile** page you can view the items pending approval. The **Approval Routing** indicates who is in the approval workflow, which approver is pending, if request is approved or denied. And you have a **Comments** text box for additional informaton.	
13.	Click the **Approve** button. Approve	
14.	Click the **OK** button. OK	
15.	Click the **ANTHONY KILGALLON** link for the second approval. ANTHONY KILGALLON	

Step	Action	Notes
16.	Click the **Deny** button. Deny	
17.	Click the **OK** button. OK	
18.	Notice the statuses (Approved and Denied) for the two profile updates.	
19.	Click the **Home** link. Home	
20.	Click the **Sign out** link. Sign out	
21.	You have completed the topic "Approve & Deny Person Profile Updates". **End of Procedure.**	

Updating Team Member Profiles

As a Manager, you can update your team members' profiles. In this topic you will add a competency to one team member and a qualification to a different team member.



Procedure

In this topic you will update a team member's profile.

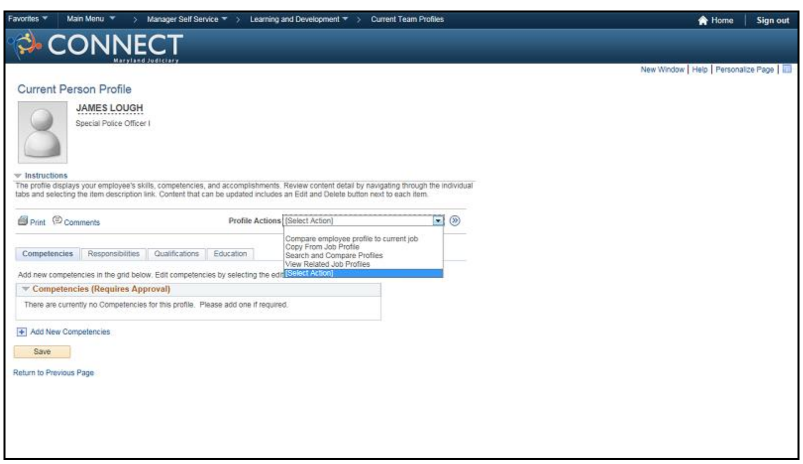
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.	
6.	Click the **Main Menu** button.	
7.	Click the **Manager Self Service** menu.	
8.	Click the **Learning and Development** menu.	
9.	Click the **Current Team Profiles** menu.	
10.	Click the **Select** button for Anthony Kilgallon.	
11.	You can add competencies, qualifications, and education to any of your team members' profiles.	
12.	Click the **Add New Competencies** link.	
13.	Click the **Look up Competency** button.	
14.	Click the **Business Knowledge** link.	
15.	Evaluation Type will be automatically defined.	

Step	Action	Notes
16.	The Rating Model will also be automatically defined based on the competency selecte.	
17.	Click the **Proficiency** list.	
18.	Click the **Meets Standards** list item. Meets Standards	
19.	Click the **OK** button. OK	
20.	Click the **Save** button. Save	
21.	Click the **Submit** button. Submit	
22.	**NOTE:** Since you, as the approving manager, submitted the competency, the profile update was automatically approved. When the employee submits the competency you will be required to approve it.	
23.	Click the **OK** button. OK	
24.	Click the **Save** button. Save	
25.	To select a different team member we will navigate using the top navigation/breadcrumbs. Click the **Current Team Profiles** menu. Current Team Profiles	
26.	Click the **Select** button Connie Abe. Select	
27.	Click the **Qualifications** tab. Qualifications	
28.	Click the **Vertical** scrollbar to move down the page.	
29.	Click the **Add New Language Skills** link. Add New Language Skills	
30.	Click in the **Language** field.	
31.	Enter "**sp**" into the **Language** field.	
32.	Click the **Speaking Proficiency** list.	

Step	Action	Notes
33.	Click the **3 - High** list item. 3 - High	
34.	Click the **Able To Translate** checkbox. Able To Translate	
35.	Click the **OK** button. OK	
36.	Click the **Save** button. Save	
37.	Click the **Home** link. Home	
38.	Click the **Sign out** link. Sign out	
39.	You have completed the topic "Updating Team Member Profiles". **End of Procedure.**	

Compare Employee Profile to Current Job

CONNECT allows you to compare your team members' personal profile to their job profile to identify any discrepancies that might exist.



Procedure

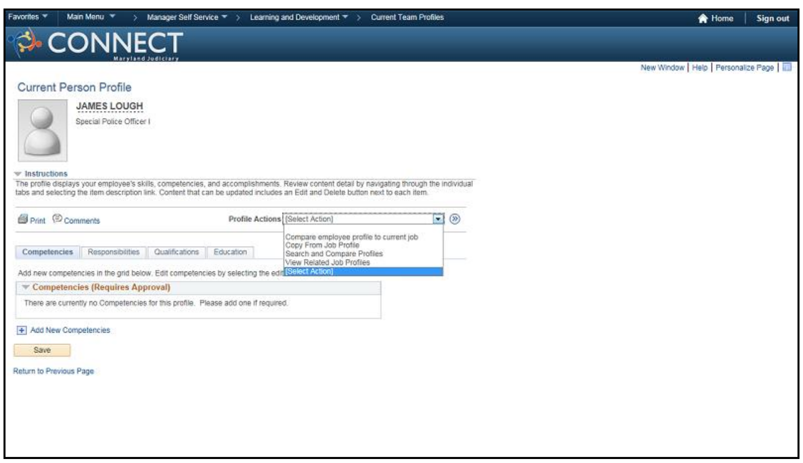
In this topic, you will compare an employee's personal profile to their current job profile.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Current Team Profiles** menu. Current Team Profiles	
10.	Click the **Select** button for James Lough. Select	
11.	Click the **Profile Actions** drop-down list. [Select Action]	
12.	Click the **Compare employee profile to current job** list item. Compare employee profile to current job	
13.	Click the **Go** button.	
14.	Click the **View Content Section** drop-down list. <View All Sections>	
15.	Click the **Competencies** list item. Competencies	
16.	Compare the competencies associated with the Special Police Officer 1 job profile (Time Management) to James's competencies. In this example, there is a 0% match indicating that James's profile does not match his job profile.	

Step	Action	Notes
17.	If your team member's personal profile does not match their job profile, you can copy their job profile in order to build their personal profile. The steps to do this are explained in the topic titled "Copy Employee Profile from Job Profile".	
18.	Click the **Return to Previous page** link. Return to Previous page	
19.	Click the **Home** link. Home	
20.	Click the **Sign out** link. Sign out	
21.	You have completed the topic "Compare Employee Profile to Current Job". **End of Procedure.**	

Copy Employee Profile from Job Profile

Copying job profiles allows you to take all the attributes of your team member's job profile and add them to their personal profile so their job and personal profiles are in sync.



Procedure

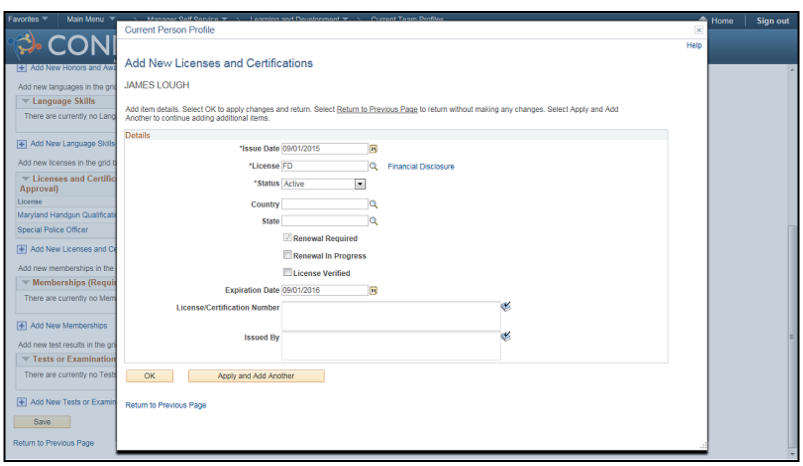
In this topic, you will copy your team member's job profile to their personal profile.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Current Team Profiles** menu. Current Team Profiles	
10.	Click the **Select** button for James Lough. Select	
11.	Click the **Profile Actions** drop-down list. [Select Action]	
12.	Click the **Copy From Job Profile** list item. Copy From Job Profile	
13.	Click the **Go** button.	
14.	Click the **OK** button. OK	
15.	The competency "**Time Management**" was copied from James's job profile and added to his personal profile.	
16.	Click the **Edit** button.	
17.	Click the **Proficiency** drop-down list.	
18.	Click the **Meets Standards** list item. Meets Standards	
19.	Click the **Vertical** scrollbar to move down the page.	

Step	Action	Notes
20.	Click the **OK** button. OK	
21.	Click the **Save** button. Save	
22.	Click the **Submit** button. Submit	
23.	Note: Since you are the approving manager, the profile update was automatically approved once it was submitted.	
24.	Click the **OK** button. OK	
25.	Click the **Home** link. Home	
26.	Click the **Sign out** link. Sign out	
27.	You have completed the topic "Copy Employee Profile from Job Profile". **End of Procedure.**	

Add Financial Disclosure to Team Member's Profile

Based on income level, your employees might be required by the state to submit a financial disclosure. The process to complete the financial disclosure is not changing. However, once they have completed it, you or the employee will add the financial disclosure as a certification to their personal profile.



Procedure

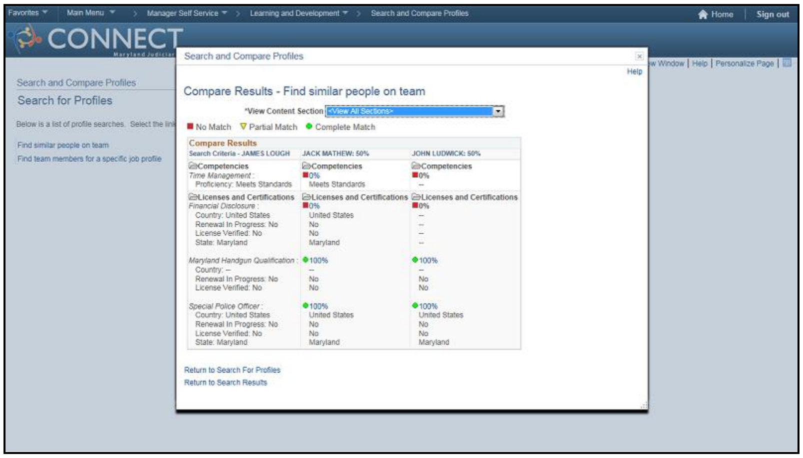
In this topic, you will add a Financial Disclosure to one of your team member's personal profile.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Current Team Profiles** menu. Current Team Profiles	
10.	Click the **Select** button for James Lough. Select	
11.	Click the **Qualifications** tab. Qualifications	
12.	Click the **Vertical** scrollbar to move down the page.	
13.	Click the **Add New Licenses and Certifications** link. Add New Licenses and Certifications	
14.	After your employee has completed their financial disclosure, enter the following information into the license/certification fields: • License • Country • State • Expiration Date • Financial Disclosure Number • Issued by	
15.	Click in the **License** field.	
16.	Enter "**fd**" into the **License** field.	

Step	Action	Notes
17.	Click in the **Country** field.	
18.	Enter "**usa**" into the **Country** field.	
19.	Click in the **State** field.	
20.	Enter "**md**" into the **State** field.	
21.	Click in the **Expiration Date** field. 09/01/2016	
22.	Press **[Backspace]**.	
23.	Enter "**12/31/2016**" into the **Expiration Date** field.	
24.	Click in the **License/Certification Number** field.	
25.	Enter "**123456789**" into the **License/Certification Number** field.	
26.	Click in the **Issued By** field.	
27.	Enter "**AOC**" into the **Issued By** field.	
28.	Click the **OK** button. OK	
29.	Click the **Save** button. Save	
30.	Click the **Submit** button. Submit	
31.	Note: Since you are the approving manager, the profile update was automatically approved once it was submitted.	
32.	Click the **OK** button. OK	
33.	Click the **Home** link. Home	
34.	Click the **Sign out** link. Sign out	
35.	You have completed the topic "Add Financial Disclosure to Team Member's Profile". **End of Procedure.**	

Find Similar People on Your Team

CONNECT allows you to select a team member's profile and search for other team members that have similar profiles.



Procedure

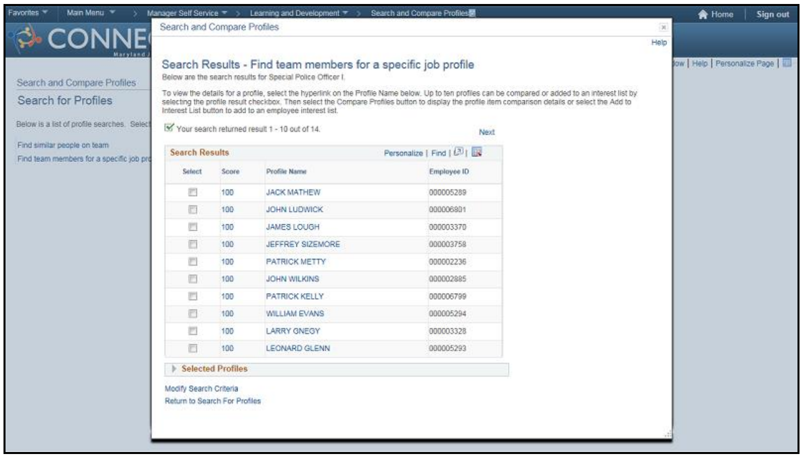
In this topic, you will select a team member's profile and search for other team members with similar profiles.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Search and Compare Profiles** menu. Search and Compare Profiles	
10.	Click the **Find similar people on team** link. Find similar people on team	
11.	Click the **Select** button for James Lough. Select	

Step	Action	Notes
12.	Click the **Search** button. Search	
13.	The individuals displayed have similar profiles to James.	
14.	Click the **Select** checkbox for Jack Mathew.	
15.	Click the **Select** checkbox for John Luddwick.	
16.	Click the **Vertical** scrollbar to move down the page.	
17.	Click the **Compare Profiles** button. Compare Profiles	
18.	Notice Jack's and John's profiles are being compared to James's profile.	
19.	Click the **Return to Search For Profiles** link. Return to Search For Profiles	
20.	Click the **Home** link. Home	
21.	Click the **Sign out** link. Sign out	
22.	You have completed the topic "Find Similar People on your Team". **End of Procedure.**	

Find Team Members for a Specific Job Profile

Find Team Members for a Specific Job Profile



Procedure

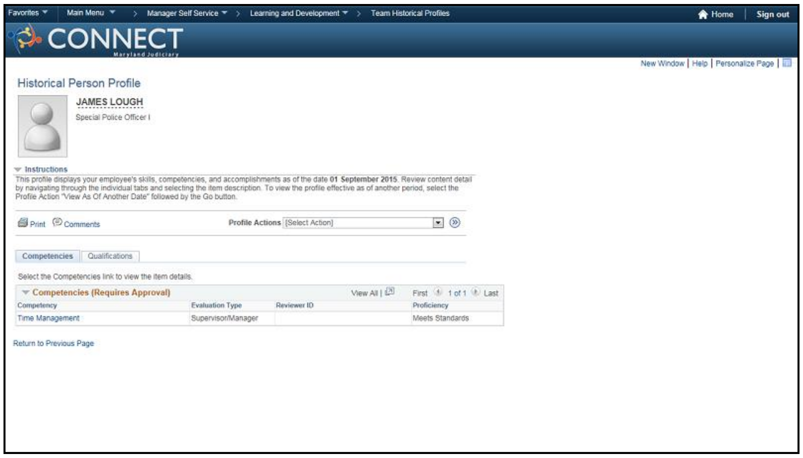
In this topic you will go through the steps for finding team members matching a specific job profile.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Search and Compare Profiles** menu. Search and Compare Profiles	
10.	Click the **Find team members for a specific job profile** link. Find team members for a specific job profile	

Step	Action	Notes
11.	Click the **Search** button. Search	
12.	Click the **Special Police Officer I** link. Special Police Officer I	
13.	Click the **Select** checkbox for John Wilkins.	
14.	Click the **Select** checkbox for James Lough.	
15.	Click the **Vertical** scrollbar to move down the page.	
16.	Click the **Compare Profiles** button. Compare Profiles	
17.	Click the **Return to Search For Profiles** link. Return to Search For Profiles	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the steps for finding team members matching a specific job profile. **End of Procedure.**	

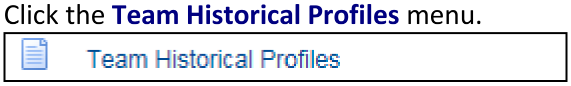
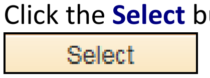
View Team Member's Historical Profile

View Team Member's Historical Profile



Procedure

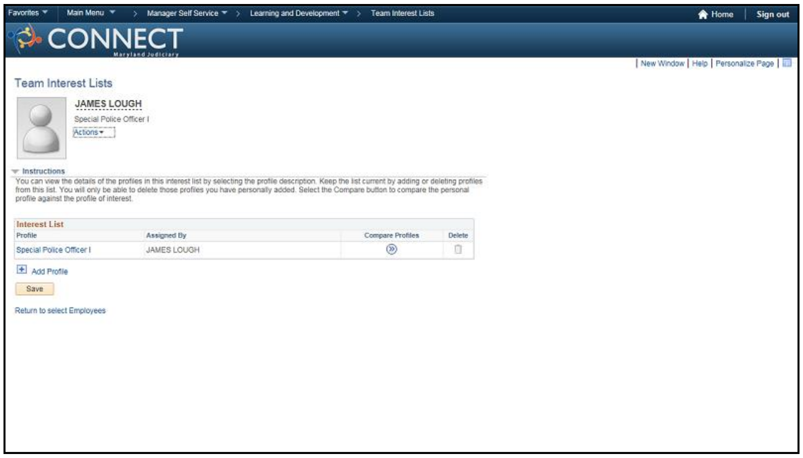
In this topic you will go through the steps for finding team members matching a specific job profile.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Learning and Development** menu. 	
9.	Click the **Team Historical Profiles** menu. 	
10.	Click the **Select** button for James Lough. 	

Step	Action	Notes
11.	Notice James has a Time Management competency as of the current date (09/01/2015)	
12.	Click the **Profile Actions** drop-down list. [Select Action]	
13.	Click the **View As Of Another Date** list item. View As Of Another Date	
14.	Click the **Go** button.	
15.	Click in the **As Of Date** field. 09/01/2015	
16.	Press **[Backspace]**.	
17.	Enter "**07/15/2015**" into the **As Of Date** field.	
18.	Click the **OK** button. OK	
19.	Notice the Time Management competency is no longer displayed for James. Only competencies current as of 07/15/2015 are displayed now.	
20.	Click the **Qualifications** tab. Qualifications	
21.	Click the **Return to Previous Page** link. Return to Previous Page	
22.	Click the **Home** link. Home	
23.	Click the **Sign out** link. Sign out	
24.	You have completed the steps for finding team members matching a specific job profile. **End of Procedure.**	

View Team Interest Lists

View Team Interest Lists



Procedure

In this topic you will go through the steps for viewing a team member interest list.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Learning and Development** menu. Learning and Development	
9.	Click the **Team Interest Lists** menu. Team Interest Lists	
10.	Click the **Select** button for James Lough. Select	

Step	Action	Notes
11.	Employees may save the profile of jobs they are interested in to compare competencies and therefore, set educational and training goals that will help them move into that position in the future.	
12.	Click the **Compare** button.	
13.	In Profile Compare you can see what competencies the job includes and compare them to your team member's competencies. In this example there is no match.	
14.	Click the **Return to Previous page** link. Return to Previous page	
15.	Click the **Home** link. Home	
16.	Click the **Sign out** link. Sign out	
17.	You have completed the steps for viewing a team member interest list. **End of Procedure.**	

Education and Learning - ELM

The Judiciary Education and Training division's learning management system provides employees the ability to search the catalog of courses and to easily enroll into available classes. The system is integrated with other modules of CONNECT allowing for information synchronization. Employees will be able to enroll and complete courses and then have the competencies achieved through training to be synchronized and therefore update their employee profile (see profile management to learn more).

Upon completion of this modules, you will be able to:

- Respond to team member learning requests
- Manage team member learning enrollments

Managing Team Member Learning Enrollments

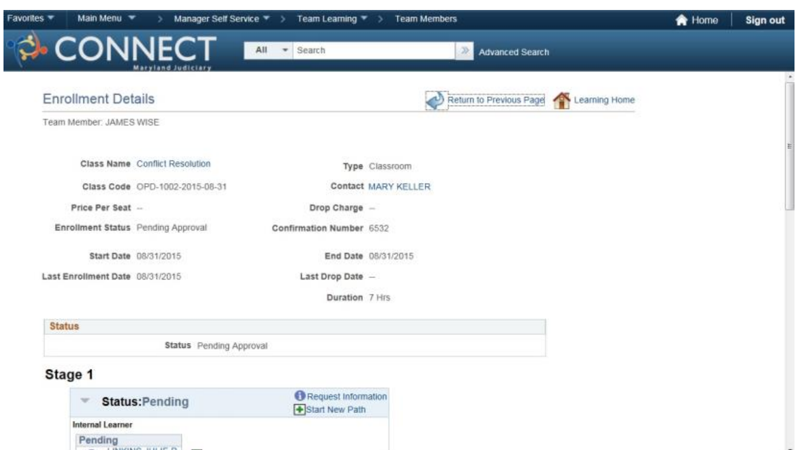
Managing Team Member Enrollments

During this module you will review topics on:

- Approving a Program or Class Enrollment Request
- Searching the Catalog and Enrolling Team Members into a Class
- Adding a Course to a Team Member's Learning Plan
- Adding a Competency, Finding Associated Learning, and Adding to Team Member's Plan
- Approving a Supplemental Learning Tuition Reimbursement Request
- Monitoring Certification Status and Approving a Recertification Request
- Dropping a Team Member's Enrollment
- Inserting a New Approver or Reviewer for a Class Enrollment

Approving a Program or Class Enrollment Request

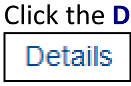
Managers have the ability to approve a program or class enrollment request.

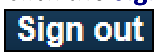


Procedure

In this topic, you will approve a class enrollment request submitted by one of your team members.

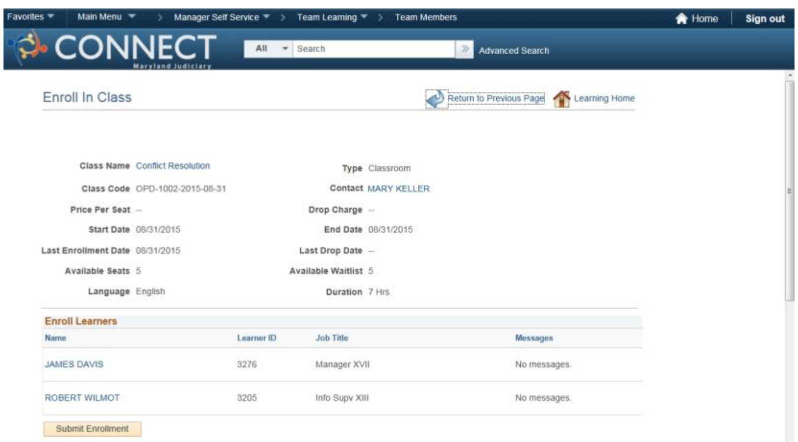
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**julie.linkins**" into the **User ID** field.	
3.	Click in the **Password** field.	

Step	Action	Notes
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.  	
6.	Click the **Main Menu** button.  	
7.	Click the **Manager Self Service** menu.	
8.	Click the **Team Learning** menu.	
9.	Click the **Team Members** menu.	
10.	All pending approvals that require a response are displayed in the first section of the Team Members page. Notice James Wise has submitted enrollment requests for classes and curricula that can be approved or denied. The steps for approving a class or curriculum are exactly the same. In this example, you will approve the enrollment request for the Conflict Resolution class.	
11.	Click the **Details** link for the James Wise Conflict Resolution class.  	
12.	View the class details as needed to make the decision to approve or deny the enrollment request.	
13.	Click the **Vertical** scrollbar to navigate down the page.	
14.	Notice the Submit, Approve, and Deny buttons at the bottom of the page. As the approving manager, you have the option to: • Submit this approval to another approver • Approve the request • Deny the request For this example, you will approve the enrollment request.	
15.	Click the **Approve** button.  	
16.	Notice the message indicating the transaction was processed successfully.	
17.	Click the **Vertical** scrollbar to navigate down the page.	

Step	Action	Notes
18.	Notice the "Approved" status at the bottom of the page. If you denied the request, the status would display "Denied".	
19.	Click the **Home** link.  	
20.	Click the **Sign out** link.  	
21.	You have completed the topic "Approving-Denying a Class Enrollment Request". **End of Procedure.**	

Searching the Catalog and Enrolling Team Members into a Class

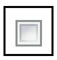
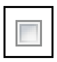
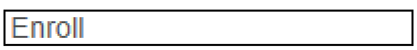
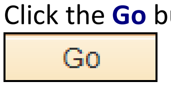
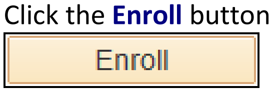
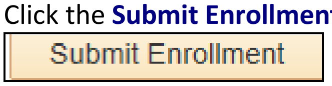
Managers have the ability to search the learning catalog for a scheduled class and enroll multiple team members into the scheduled class.



Procedure

In this topic you will go through the steps to search the catalog and enroll team members into a scheduled class.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**julie.linkins**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu.	
8.	Click the **Team Learning** menu.	
9.	Click the **Team Members** menu.	
10.	Click the **Vertical** scrollbar to navigate down the page.	
11.	Click the **JAMES DAVIS** checkbox. 	
12.	Click the **ROBERT WILMOT** checkbox. 	
13.	Click the **Group Actions** drop-down list. 	
14.	Click the **Enroll** list item. 	
15.	Click the **Go** button. 	
16.	This is the **Find Learning** page. This page is used to search the catalog in order to find classes for enrollment.	
17.	Click in the **Search by keyword** field.	
18.	Enter "**conflict**" into the **Search** field.	
19.	Click the **Search** button. 	
20.	The search displayed one class that matched the keyword "Conflict".	
21.	Click the **Enroll** button. 	
22.	Notice the class details are listed, which can be reviewed before enrolling team members into the class.	
23.	Click the **Submit Enrollment** button. 	

Step	Action	Notes
24.	Notice the enrollment messages. The enrollment for James was not processed because he was already enrolled into this class. The enrollment for Robert was processed successfully.	
25.	Click the **Team Learning** button. Team Learning	
26.	Click the **Team Learning** menu.	
27.	Click the **For** drop-down list. All Learners	
28.	Click the **ROBERT WILMOT** list item. ROBERT WILMOT	
29.	Click the **Go** button. Go	
30.	Notice the enrollment record for Robert. He is enrolled into the Conflict Resolution class.	
31.	Click the **Home** link. Home	
32.	Click the **Sign out** link. Sign out	
33.	You have completed the steps to search the catalog and enroll team members into a scheduled class. **End of Procedure.**	

Adding a Course to a Team Member's Learning Plan

Adding a Competency, Finding Associated Learning, and Adding to Team Member's Plan.

Procedure

In this topic you will go through the steps to add a course to a team member's learning plan.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**timothy.finan**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

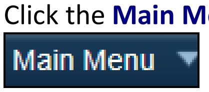
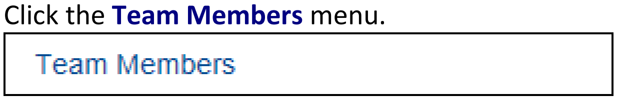
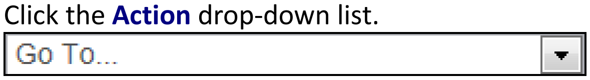
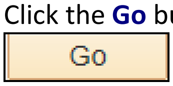
Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu.	
8.	Click the **Team Learning** menu.	
9.	Click the **Team Learning Plans** menu.	
10.	Use the **Team Learning Plans** page to select the employee's learning plan you want to update.	
11.	Click the **Learning Plan - 2016** link. Learning Plan - 2016	
12.	The Learning Plan Details page displays the learners current planned learning. In this example the learner has no assigned learning.	
13.	Click the **Add New Learning to Plan** button. Add New Learning to Plan	
14.	Click in the **Search by keyword** field.	
15.	Enter "**generations**" into the **Search** field.	
16.	Click the **Search** button. »	
17.	Click the **Select** button. Select	
18.	Before adding the learning to the team member's learning plan, you are able to define the target completion date, the priority, and if the learning is required.	
19.	Click in the **Target Completion** field.	
20.	Enter "**12/31/2016**" into the **Target Completion** field.	
21.	Click the **Priority** drop-down list. Low	
22.	Click the **Medium** list item. Medium	

Step	Action	Notes
23.	Click the **Required** checkbox.	
24.	Click the **Save** button. Save	
25.	Notice the course has been added to the **Learning Plan Details** section.	
26.	Click the **Home** link. Home	
27.	Click the **Sign out** link. Sign out	
28.	You have completed the steps to add a course to a team member's learning plan. **End of Procedure.**	

Adding a Competency, Finding Associated Learning, and Adding to Team Member's Plan

Procedure

In this topic you will go through the steps to adding a competency, finding learning associated to that competency, and adding that learning to a team member's learning plan.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**timothy.finan**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Team Learning** menu.	
9.	Click the **Team Members** menu. 	
10.	Click the **LEAH SCARPELLI** checkbox. 	
11.	Click the **Action** drop-down list. 	
12.	Click the **Learning Competencies** list item. 	
13.	Click the **Go** button. 	
14.	This is the Team Member Competencies page. This is where	

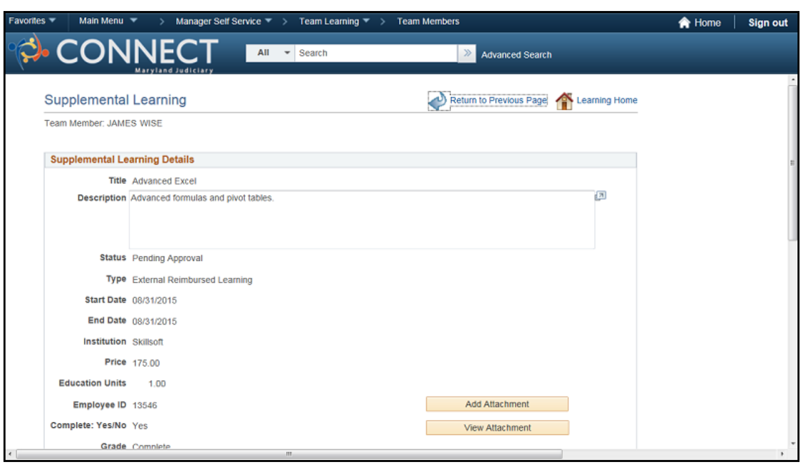
Step	Action	Notes
15.	Click the **Add New Competency** button. Add New Competency	
16.	Click in the **Competency** field.	
17.	Enter "**relationship building**" into the **Competency** field.	
18.	Click the **Search** button. Search	
19.	Click the **Select** checkbox for Relationship Building.	
20.	Click the **Proficiency** drop-down list.	
21.	Click the **Meets Standards** list item. Meets Standards	
22.	Click in the **Target Completion Date** field.	
23.	Enter "**12/31/2016**" into the **Target Completion Date** field.	
24.	Click the **Required** checkbox. Required	
25.	Click the **Add** button. Add	
26.	Click the **Find Learning** link. Find Learning	
27.	**Note:** Only courses linked to the competency "Relationship Building" will be displayed in the search results.	
28.	Click the **Plan for Later** button. Plan for Later	
29.	Click the **000006829** checkbox.	
30.	Click the **Go** button. Go	
31.	Click in the **Target Completion** field.	
32.	Enter "**12/31/2016**" into the **Target Completion** field.	

Step	Action	Notes
33.	Click the **Priority** drop-down list. Low	
34.	Click the **Medium** list item. Medium	
35.	Click the **Required** checkbox.	
36.	Click the **Save** button. Save	
37.	Click the **Home** link. Home	
38.	Click the **Sign out** link. Sign out	
39.	You have completed the steps to adding a competency, finding learning associated to that competency, and adding that learning to a team member's learning plan. **End of Procedure.**	

Approving a Supplemental Learning Tuition Reimbursement Request

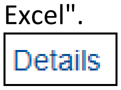
When an employee submits a tuition reimbursement for supplemental learning, the employee's manager will approve or deny the request. If approved by the manager, the request will automatically be routed to the OPD Manager for final approval.

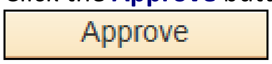
The image below displays the supplemental learning request details submitted by James Wise, the pending approval with the employee's manager, and the subsequent approval with the OPD Manager.



Procedure

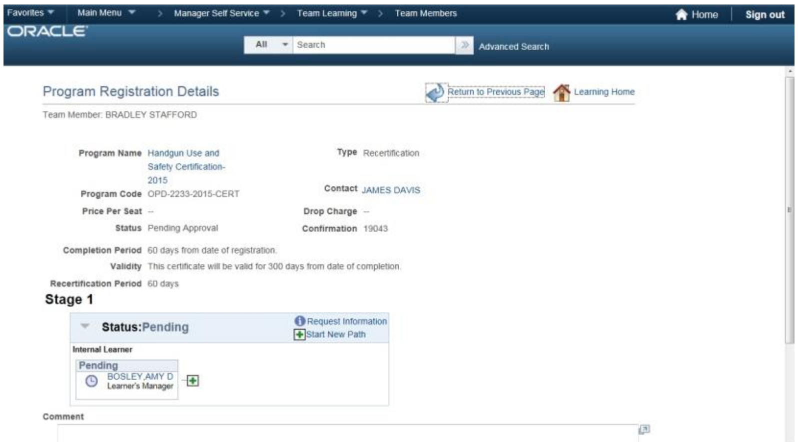
In this topic, you will approve a supplemental learning tuition reimbursement request submitted by one of your team members.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**julie.linkins**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu.	
8.	Click the **Team Learning** menu.	
9.	Click the **Team Members** menu.	
10.	All pending approvals that require a response are displayed in the first section of the Team Members page. Notice James Wise has submitted enrollment requests for classes, curricula, and supplemental learning that can be approved or denied. The steps for approving any of these items are exactly the same. In this example, you will approve the Advanced Excel supplemental learning request.	
11.	Click the **Details** link for the supplemental learning "Advanced Excel". 	
12.	Review the supplemental learning details.	
13.	Click the **Vertical** scrollbar to navigate down the page.	
14.	Notice the approval path. Julie Linkins (the manager logged in for this example) is the first approver. James C Davis (the OPD Manager) is the second approver. Once approved by Julie, the request will be routed to James Davis for approval.	

Step	Action	Notes
15.	Notice the Submit, Approve, and Deny buttons at the bottom of the page. As the approving manager, you have the option to: • <u>Submit</u> this approval to another approver • <u>Approve</u> the request • <u>Deny</u> the request For this example, you will approve the enrollment request.	
16.	Click the **Approve** button. 	
17.	Notice the message indicating the transaction was processed successfully.	
18.	Click the **Vertical** scrollbar to navigate down the page.	
19.	Notice the "Approved" status at the bottom of the page. If you denied the request, the status would display "Denied".	
20.	Click the **Home** link. 	
21.	Click the **Sign out** link. 	
22.	You have completed the topic "Approving a Supplemental Learning Tuition Reimbursement Request". **End of Procedure.**	

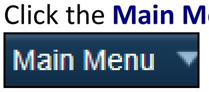
Monitoring Certification Status and Approving a Recertification Request

Managers have the ability to review and approve a team member's request for recertification in a certification program.



Procedure

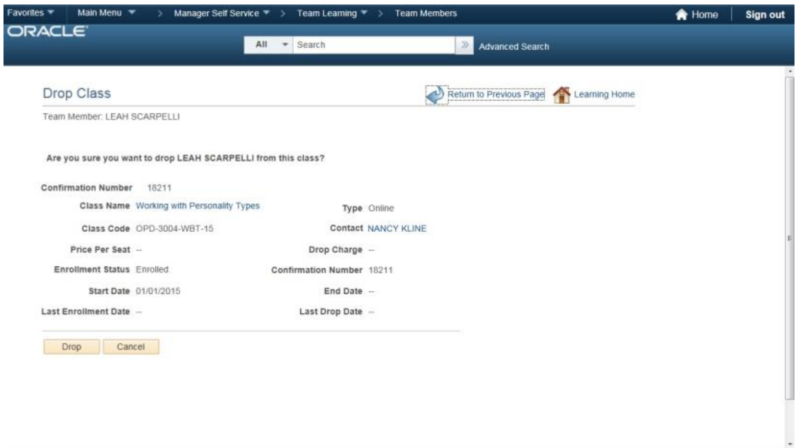
In this topic you will go through the steps to review and approve a recertification request from a team member.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Team Learning** menu.	
9.	Click the **Team Members** menu.	
10.	Click the **BRADLEY STAFFORD** checkbox. 	

Step	Action	Notes
11.	Click the **Action** drop-down list. Go To...	
12.	Click the **Certification Status** list item. Certification Status	
13.	Click the **Go** button. Go	
14.	Notice the status for Bradley's Handgun certification is "Warning" indicating a limited number of days to complete the recertification.	
15.	Click the **Return to Previous Page** link. Return to Previous Page	
16.	Notice Bradley has requested approval for the Handgun certification.	
17.	Click the **Details** link for Bradley's Handgun certification. Details	
18.	Click the **Vertical** scrollbar to navigate down the page.	
19.	Click the **Approve** button. Approve	
20.	Notice the message indicating the transaction was processed successfully.	
21.	Click the **Team Members** menu. Team Members	
22.	Since Bradley's certification request was approved, it no longer exists in Amy's Pending Approvals list.	
23.	Click the **Home** link. Home	
24.	Click the **Sign out** link. Sign out	
25.	You have completed the steps to review and approve a recertification request from a team member. **End of Procedure.**	

Dropping a Team Member's Enrollment

Managers have the ability to drop a team member from a class they are enrolled in.



Procedure

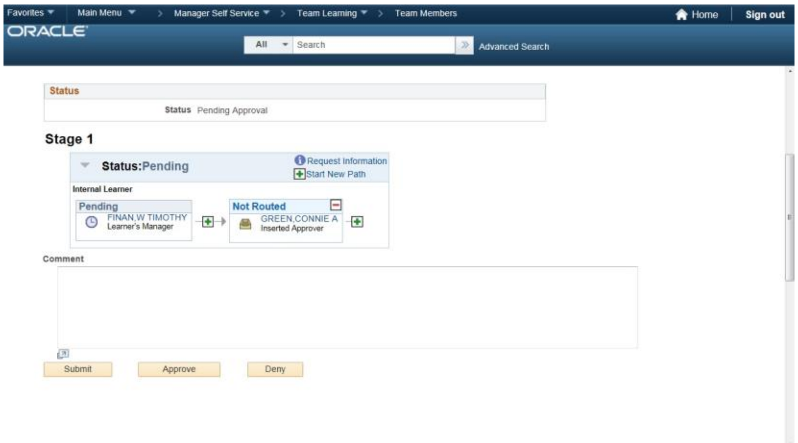
In this topic you will go through the steps to drop a team member from a class.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**timothy.finan**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu.	
8.	Click the **Team Learning** menu.	
9.	Click the **Team Members** menu.	
10.	Click the **Action** drop-down list. Go To...	
11.	Click the **Team Learning** list item. Team Learning	

Step	Action	Notes
12.	Click the **Go** button. Go	
13.	The **Team Learning** page displays all the learning for the selected team member. In order to drop a team member from a class they must have a status of "Enrolled".	
14.	Click the **Drop** button. Drop	
15.	Notice the class details are listed for review before submitting the drop.	
16.	Click the **Drop** button. Drop	
17.	Notice the green check mark indicating the team member was successfully dropped from the class.	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the steps to drop a team member from a class. **End of Procedure.**	

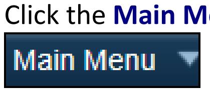
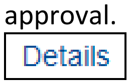
Inserting a New Approver or Reviewer for a Class Enrollment

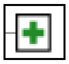
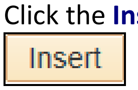
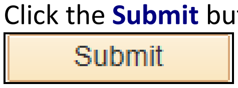
Managers have the ability to insert an additional approver or reviewer into a team member's enrollment request before they approve the request.



Procedure

In this topic you will go through the steps to insert a new approver for a team member's class enrollment request.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**timothy.finan**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu.	
8.	Click the **Team Learning** menu.	
9.	Click the **Team Members** menu.	
10.	Click the **Details** link for the Fundamentals of Customer Service approval. 	
11.	Click the **Vertical** scrollbar to navigate down the page.	

Step	Action	Notes
12.	If desired, you can insert an additional approver into the existing approval chain. This means that once the first person approves the request, it will be routed to the next person. In this example, you will insert Connie Green.	
13.	Click the **Insert Approver** button. 	
14.	Click the **User ID Look Up** button. 	
15.	Click in the **Name** field. 	
16.	Enter "**connie**" into the **Name** field.	
17.	Click the **Search** button. 	
18.	Click the **CONNIE A. GREEN** link. 	
19.	Notice you have the option to select Approver or Reviewer. Selecting Approver will require Connie to approve or deny this transaction once it is routed to her. If she is added as a Reviewer, Connie would simply be notified that Leah's request was approved/denied by her Manager. In this example, leave Connie as the Approver.	
20.	Click the **Insert** button. 	
21.	Click the **Submit** button. 	
22.	Click the **Home** link. 	
23.	Click the **Sign out** link. 	
24.	You have completed the steps to insert a new approver for a team member's class enrollment request. **End of Procedure.**	

Recruitment

CONNECT recruitment is a complete, integrated system that enables organizations to effectively Manage workforce acquisition across all employment categories. Whether you have a few resumes to fill hard-to-find positions or you have plenty of resumes but top candidates are scarce, CONNECT is ideally suited to meet your needs in any type of hiring conditions. Streams of applicants can be screened, interviewed, and hired quickly and efficiently.

Upon completion of this modules, you will be able to:

- Create a job opening and enter the job details
- Edit a job opening
- Clone a job opening
- Approve or deny a job opening
- View applicant's activity
- Respond to routed applicants
- Review interview schedules and evaluation
- Complete an interview evaluation
- Record the final interview recommendations
- Approve or deny job offers
- Delegate specific responsibilities
- Accept or reject delegation authorities
- Revoking and reviewing delegation proxies

Managing Job Openings

The Managing Job Openings section will demonstrate processes for:

- Creating and editing job openings for both Hiring Managers and Administrative Officials
- How to clone a job opening, and
- Approving or denying job opening requests

When a job opening is created, the user starts by entering certain high-level information and will then navigate to the Job Openings page to provide details. You may edit the job opening details by navigating back to the Job Openings page. (Details for the job opening cannot be changed once the recruiter has posted the job).

When creating a job opening that is similar to an existing one, you can avoid tedious data entry by cloning the existing job. You can clone existing job openings that have any status except *Draft.*

Creating a Job Opening and Entering Job Details

Create a Job Opening and Enter Job Details

This topic will demonstrate the process of creating a job opening by providing both high level and detailed information about the position.

Procedure

In this topic, a Hiring Manager creates a job opening and enters job details such as work experience and degrees required and also assigns the Hiring Team.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	

Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Create Job Opening** menu. Create Job Opening	
9.	In this section, you will enter all required information which will be marked with an asterisk.	
10.	Click in the **Job Family** field.	
11.	Enter "**CRTMGT**" into the **Job Family** field.	
12.	Click the **CRTMGT** object. CRTMGT	
13.	Click in the **Position Number** field.	
14.	Enter "**086611**" into the **Position Number** field.	
15.	Click the **086611** object. 086611	
16.	Click in the **Recruiting Location** field.	
17.	Enter "**1002**" into the **Recruiting Location** field.	
18.	Click in the **Profile ID** field.	
19.	Enter "**601001**" into the **Profile ID** field.	
20.	Click the **601001** object. 601001	
21.	Click the **Continue** button. Continue	
22.	Click the **Update Primary Profile** option.	
23.	Click the **Continue** button. Continue	
24.	Click in the **Desired Start Date** field.	
25.	Enter "**08/30/2015**" into the **Desired Start Date** field.	

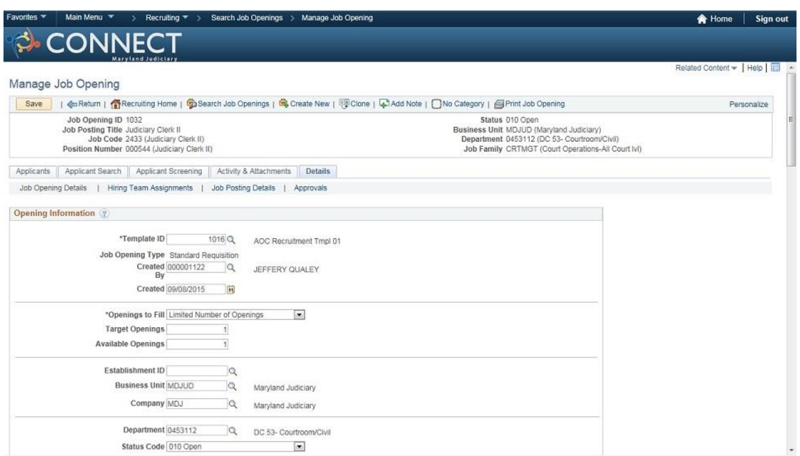
Step	Action	Notes
26.	Click the **Vertical** Scroll bar to move down the page.	
27.	Click the **Highest Education Level** drop-down list.	
28.	Click the **C-HS Graduate or Equivalent** list item.	
29.	Click in the **Years of Work Experience** field.	
30.	Enter "**3**" into the **Years of Work Experience** field.	
31.	Click the **Add Degrees** button. Add Degrees	
32.	Enter "**BA**" into the **Degree** field.	
33.	Click the **Bachelor of Arts** object. BA Bachelor of Arts	
34.	Click the **Save and Add Another** button. Save and Add Another	
35.	Enter "**bs**" into the **Degree** field.	
36.	Click the **Save** button. Save	
37.	Click the **Vertical** Scroll bar to move up the page.	
38.	Click the **Hiring Team Assignments** tab. Hiring Team Assignments	
39.	Click the **Add Recruiter Team** button. Add Recruiter Team	
40.	Click the **Select** option for AOC Recruitment Team.	
41.	Click the **OK** button. OK	
42.	A Primary Recruiter must be selected for all job openings.	
43.	Click the **Primary** option next to MARCY GOODE.	
44.	Click the **Add Hiring Manager** button. Add Hiring Manager	
45.	Click in the **Name** field.	
46.	Enter "**David Warnick**" into the **Name** field.	
47.	Click the **Vertical** Scroll bar to move down the page.	

Step	Action	Notes
48.	Click the **Save and Submit** button. Save and Submit	
49.	Click the **Home** link. Home	
50.	Click the **Sign out** link. Sign out	
51.	You have completed the topic "Creating a Job Opening and Entering Job Details." **End of Procedure.**	

Editing a Job Opening

Editing a job opening

This topic will demonstrate the process of accessing a current job opening and editing specific job opening details.



Procedure

In this topic, the Hiring Manager will edit job opening details.

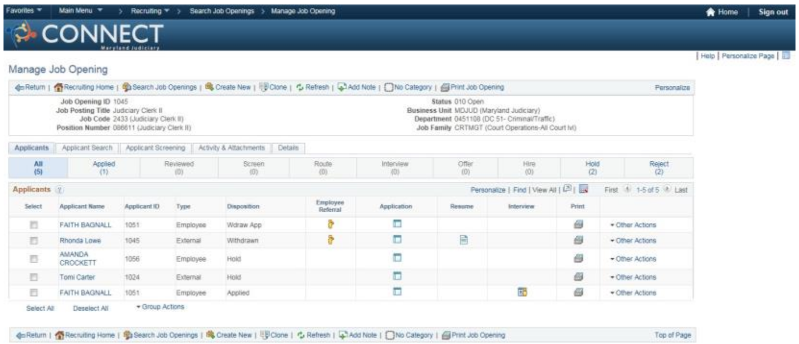
Step	Action	Notes
1.	Click the **User ID** field.	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Search Job Openings** menu. Search Job Openings	
9.	Click in the **Job Opening ID** field.	
10.	Enter "**1027**" into the **Job Opening ID** field.	
11.	Click the **Status** drop-down list. Open	
12.	Click the **Pending** list item. Pending	
13.	Click the **Search** button. Search	
14.	Click the **Judiciary Clerk II** link. Judiciary Clerk II	
15.	Click the **Vertical** scroll bar to move down the page.	
16.	Click in the **Years of Work Experience** field. 3.0	
17.	Press "**Delete**" on your keyboard to delete the current value.	
18.	Enter "**5**" into the **Years of Work Experience** field.	
19.	Click the **Vertical** scroll bar to move up the page.	
20.	Click the **Save** button. Save	
21.	Click the **Home** link. Home	
22.	Click the **Sign out** link. Sign out	
23.	**End of Procedure.**	

Cloning a Job Opening

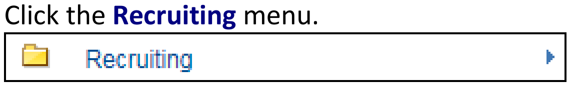
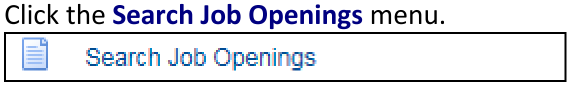
Cloning a job opening

This topic will demonstrate the process of cloning a similar job opening from an existing job opening.



Procedure

In this topic, a Hiring Manager will clone a job opening using a previous opening.

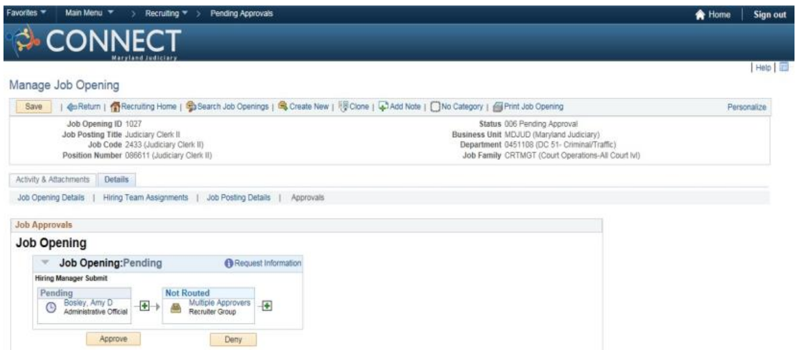
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Search Job Openings** menu. 	
9.	Click in the **Job Opening ID** field. 	

Step	Action	Notes
10.	Enter "**1021**" into the **Job Opening ID** field.	
11.	Click the **Search** button. Search	
12.	Click the **Judiciary Clerk II** link. Judiciary Clerk II	
13.	Click the **Clone** link. Clone	
14.	Click in the **New Posting Title** field.	
15.	Press **[Backspace]**.	
16.	Enter "**Judiciary Clerk II-Temp**" into the **New Posting Title** field.	
17.	Be sure to enter the correct data for "Number of New Job Openings". It will auto-populate "1".	
18.	Click the **Clone** button. Clone	
19.	A new Job Opening and Job Opening ID has been created.	
20.	Click the **Close** button. Close	
21.	Click the **Home** link. Home	
22.	Click the **Sign out** link. Sign out	
23.	You have completed the topic "Cloning a Job Opening". **End of Procedure.**	

Approving a Job Opening (Administrative Official)

Approving a job opening

This topic will demonstrate the process of accessing a pending job opening and approving it so it can subsequently be posted.



Procedure

In this topic, an Administrative Official approves a Job Opening submitted by a Hiring Manager.

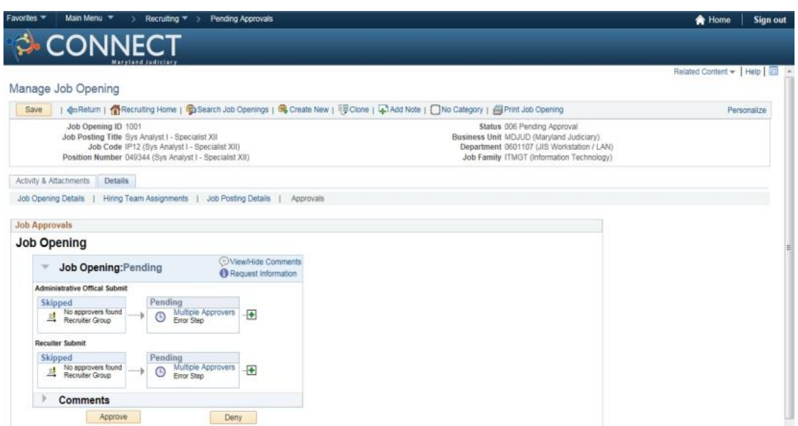
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Pending Approvals** menu. Pending Approvals	
9.	The "Pending Approvals" page will appear where you will see all of the Job Openings routed to the Administrative Official.	
10.	Click the **Job Approval:Judiciary Clerk II** link. Job Approval:Judiciary Clerk II	

Step	Action	Notes
11.	Click the **Approvals** link. Approvals	
12.	Click the **Approve** button. Approve	
13.	Click the **Save** button. Save	
14.	Click the **Home** link. Home	
15.	Click the **Sign out** link. Sign out	
16.	You have completed the topic "Approving a Job Opening." **End of Procedure.**	

Denying a Job Opening (Administrative Official)

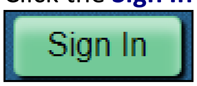
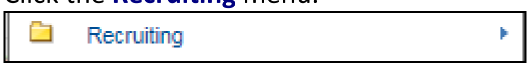
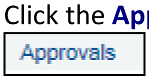
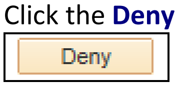
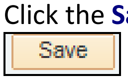
Denying a Job Opening

This topic demonstrates the process for accessing a pending job opening and denying it and providing information on why it was denied.



Procedure

In this topic, an Administrative Official denies a Job Opening submitted by a Hiring Manager.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Pending Approvals** menu. 	
9.	The Pending Approvals page will appear where you will see all Job Openings routed to the Administrative Official.	
10.	Click the **Job Approval:Telecommunication Analyst** link. 	
11.	Click the **Approvals** link. 	
12.	You must enter a comment first when denying a Job Opening, Connect will not allow a denial without a reason.	
13.	Click in the **Comments Text** field.	
14.	Enter "**Incorrect position number. Please resubmit.**" into the **Comments Text** field.	
15.	Click the **Deny** button. 	
16.	Click the **Save** button. 	
17.	Click the **Home** link. 	

Step	Action	Notes
18.	Click the **Sign out** link.  	
19.	You have completed the topic "Denying a Job Opening". **End of Procedure.**	

Managing and Reviewing Applicants

The Managing and Reviewing Applicants section will demonstrate processes for:

- Viewing Applicant Activity
- Forwarding an Applicant
- Responding to Routed Applicants
- Sending Correspondence with a Letter to an Applicant
- Linking Applicants to Job Openings
- Routing Applicants
- Rejecting an Applicant
- Adding an Applicant to a List
- Managing Contact Notes and Attachments

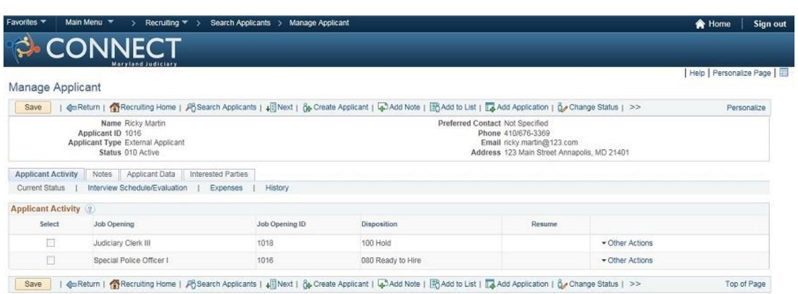
Applicant activity consists of recruiting activities for the applicant. It is divided into four subsections: Current Status, Interview Evaluation/Summary, Expenses, and History.

Routing is the action of sending requests that ask people to provide input on decisions regarding applicants.

Viewing Applicant Activity

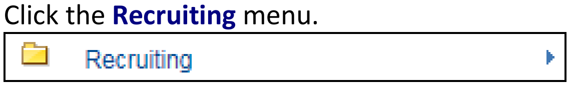
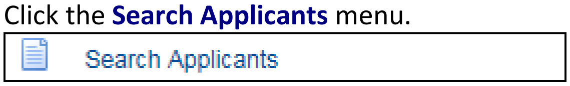
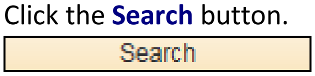
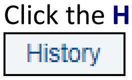
Viewing Applicant Activity

This topic demonstrates the process for viewing applicant activities such as their current status, interview schedules and evaluations, expenses, and history.



Procedure

In this topic, the Hiring Manager views the applicant's activity.

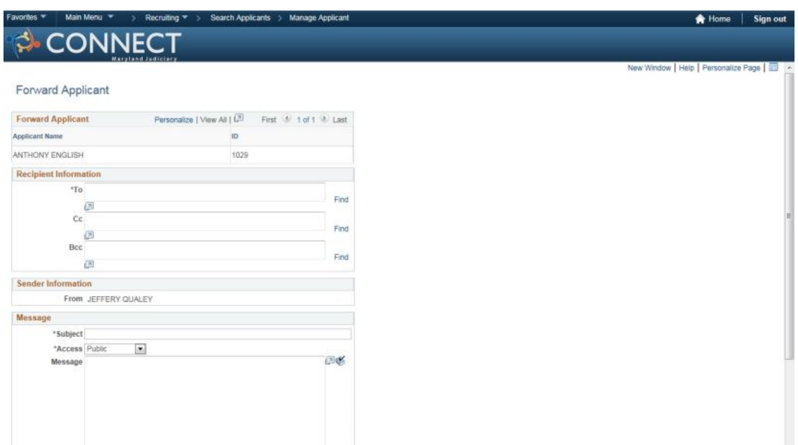
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Search Applicants** menu. 	
9.	Click the **Search My Applicants** option to uncheck the box. 	
10.	Click in the **Last Name** field. 	
11.	Enter "**Martin**" into the **Last Name** field.	
12.	If you are unsure of the last name of the applicant, you can leave this field blank and click search.	
13.	Click the **Search** button. 	
14.	Click the **Ricky Martin** link. 	
15.	Here, you can see the **current status** of the Mr. Martin's applications.	
16.	Click the **History** link. 	

Step	Action	Notes
17.	Here, you can view Mr. Martin's entire applicant history. You can click different links to view the applicant's file.	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the topic "Viewing Applicant Activity". **End of Procedure.**	

Forwarding an Applicant

Forwarding an Applicant

Recruiters and Hiring Managers can forward applicants to one or more persons to enable those persons to review the applicant. When forwarding an applicant, CONNECT sends a notification to the people specified on the Forward Applicant page. Forwarding an applicant is similar to routing an applicant. However, when you forward an applicant, the system does not change the applicant disposition.



Procedure

In this topic, a recruiter will forward an applicant for review.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	

Step	Action	Notes
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Search Applicants** menu. Search Applicants	
9.	Click the **Search My Applicants** option to uncheck box.	
10.	Click the **Search** button. Search	
11.	Click the **ANTHONY ENGLISH** link. ANTHONY ENGLISH	
12.	Click the show more **>>** link. >>	
13.	Click the **Forward Applicant** link. Forward Applicant	
14.	Click in the **To** field.	
15.	Enter "**caguilera@test.com**" into the **To** field.	
16.	Click in the **Subject** field.	
17.	Enter "**Applicant Information**" into the **Subject** field.	
18.	Click the **Access** drop-down list. Public	
19.	Click the **Private** list item. Private	
20.	Click in the **Message** field.	
21.	Enter "**Please review this application before the interview.**" into the **Message** field.	
22.	Click the **Vertical** scroll bar to move down the page.	
23.	Click the **Send** button. Send	

Step	Action	Notes
24.	Click the **OK** button. OK	
25.	Click the **Home** link. Home	
26.	Click the **Sign out** link. Sign out	
27.	You have completed the topic "Forwarding an Applicant". **End of Procedure.**	

Responding to Routed Applicants

Responding to Routed Applicants

This topic will demonstrate the process for giving a response to a routed applicant with regards to the application process. Some examples of responses are "Invite for Interview", "Reject", or "Hold".

Procedure

In this topic, a Hiring Manager responds to a routed applicant from the Recruiter.

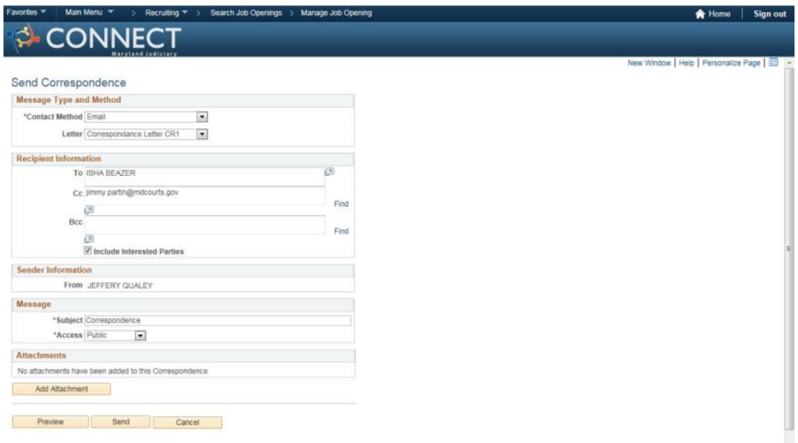
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	

Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Recruiting** menu. Recruiting	
9.	Click the **Routing Response** menu. Routing Response	
10.	The Routing Response page lists the applicants that have been routed to you. You have the option to filter the applicant list by date routed or routing response.	
11.	Click the **ISHA BEAZER** link. ISHA BEAZER	
12.	Click the **Recommendation** drop-down list.	
13.	Click the **020 Invite for Interview** list item. 020 Invite for Interview	
14.	Click in the **Comments** field.	
15.	Enter "**Please schedule an interview.** " into the **Comments** field.	
16.	Click the **Submit** button. Submit	
17.	Click the **OK** button. OK	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the topic "Responding to Routed Applicants". **End of Procedure.**	

Sending Correspondence with a Letter to an Applicant

Sending Correspondence with a Letter to an Applicant

This topic will demonstrate the process for sending correspondence to an applicant. CONNECT allows correspondence to be sent to an applicant either with a letter or an email.



Procedure

In this topic, a recruiter will send correspondence to an applicant.

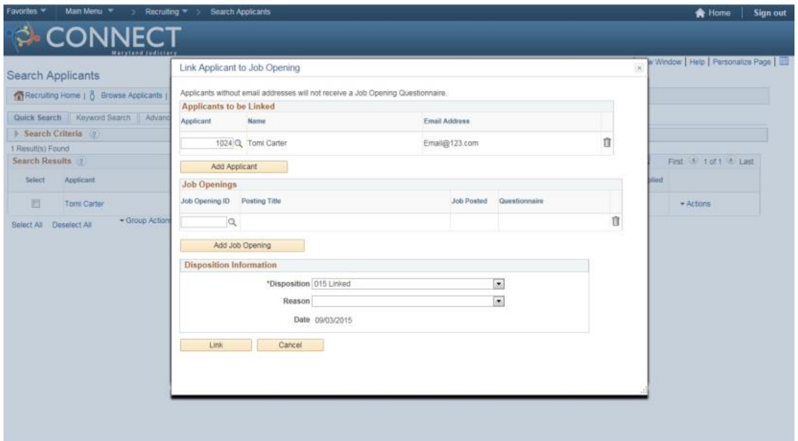
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Search Job Openings** menu. Search Job Openings	
9.	Click in the **Job Opening ID** field.	

Step	Action	Notes
10.	Enter "**1027**" into the **Job Opening ID** field.	
11.	Click the **Search** button. Search	
12.	Click the **Judiciary Clerk II** link. Judiciary Clerk II	
13.	Click the **Other Actions** link. Other Actions	
14.	Click the **Applicant Actions** menu. Applicant Actions	
15.	Click the **Send Correspondence** menu. Send Correspondence	
16.	The Contact Method will default to Email.	
17.	Click the **Letter** drop-down list.	
18.	Click the **Correspondence Letter CR1** list item. Correspondance Letter CR1	
19.	Click in the **Subject** field.	
20.	Enter "**Correspondence**" into the **Subject** field.	
21.	Click the **Preview** button. Preview	
22.	Click the **Vertical** scroll bar to move down the page.	
23.	Click the **Send** button. Send	
24.	Click the **OK** button. OK	
25.	Click the **Home** link. Home	
26.	Click the **Sign out** link. Sign out	
27.	You have completed the topic "Sending Correspondence with a Letter to an Applicant". **End of Procedure.**	

Linking Applicants to Job Openings

Linking Applicants to Job Openings

This topic demonstrates the process for linking an applicant to a job opening. If an applicant is qualified for a specific job opening and should be considered, you can link the applicant to that job opening. The link between an applicant and a job is what causes the job opening to appear on the Manage Applicant Page and the applicant to appear on the Job Opening page.



Procedure

In this topic, a recruiter will link a specific applicant to a specific job opening.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Search Applicants** menu. Search Applicants	

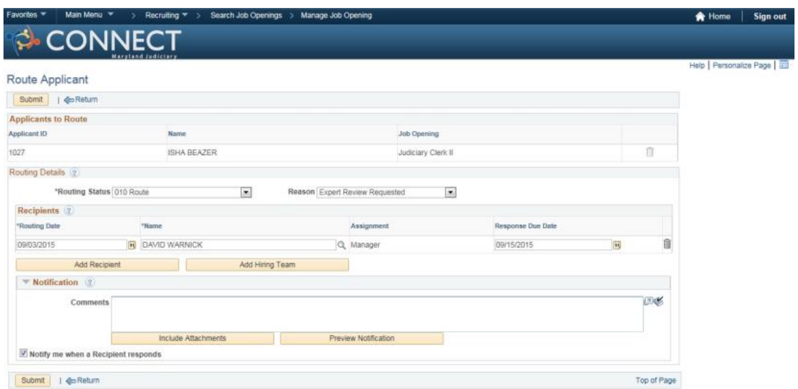
Step	Action	Notes
9.	Click the **Search My Applicants** option to remove check from box.	
10.	Click in the **Last Name** field.	
11.	Enter "**Carter**" into the **Last Name** field.	
12.	Click the **Search** button. Search	
13.	Click the **Actions** link. Actions	
14.	Click the **Link Applicant to Job** menu. Link Applicant to Job	
15.	Click in the **Job Opening ID** field.	
16.	Enter "**1027**" into the **Job Opening ID** field.	
17.	Click the **Disposition** drop-down list. 015 Linked	
18.	There are many different dispositions you can use for the applicant. In this example, we will choose Applied.	
19.	Click the **010 Applied** list item. 010 Applied	
20.	The system determines whether the job opening includes screening questions. If it does, the system sends an email inviting the applicant to use Candidate Gateway to submit a new application for the job opening so that the applicant can answer the questions.	
21.	Click the **Link** button. Link	
22.	Click the **OK** button. OK	
23.	Click the **Home** link. Home	
24.	Click the **Sign out** link. Sign out	

Step	Action	Notes
25.	You have completed the topic "Linking Applicants to Job Openings". **End of Procedure.**	

Routing Applicants

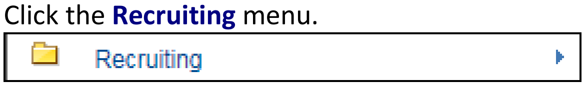
Routing Applicants

Routing is the action of sending requests that ask people to provide input on that decision. The Route Applicant action is available from several pages, including the Manage Job Opening page, Manage Applicant page, Manage Application page, and Search Applications page.



Procedure

In this section, a recruiter will ask for input by routing an applicant.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	

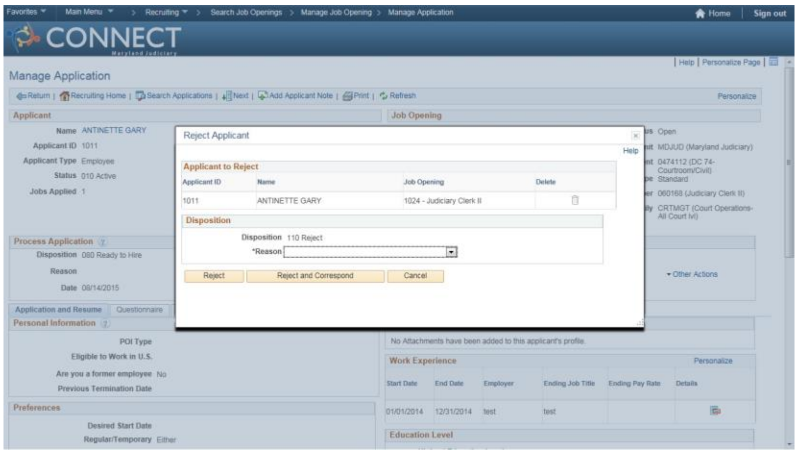
Step	Action	Notes
8.	Click the **Search Applicants** menu. Search Applicants	
9.	Click the **Search My Applicants** option to remove check from the box. ☑	
10.	Click in the **Last Name** field.	
11.	Enter "**Beazer**" into the **Last Name** field.	
12.	Click the **Search** button. Search	
13.	Click the **Actions** link. ▾ Actions	
14.	In this example we will link an applicant to a job before we route them. This is not always a necessary step as some applicants will already be linked to a job by applying.	
15.	Click the **Link Applicant to Job** menu. Link Applicant to Job	
16.	Click in the **Job Opening ID** field.	
17.	Enter "**1027**" in the **Job Opening ID** field.	
18.	Click the **Disposition** drop-down list. 015 Linked	
19.	Click the **010 Applied** list item. 010 Applied	
20.	Click the **Link** button. Link	
21.	Click the **OK** button. OK	
22.	Click the **Recruiting** button. Recruiting ▾	
23.	Click the **Search Job Openings** menu. Search Job Openings	
24.	Click in the **Job Opening ID** field.	
25.	Enter "**1027**" into the **Job Opening ID** field.	

Step	Action	Notes
26.	Click the **Search** button. Search	
27.	Click the **Judiciary Clerk II** link. Judiciary Clerk II	
28.	Click the **Route Applicant** button for ISHA BEAZER.	
29.	Click the **Routing Status** drop-down list.	
30.	Click the **010 Route** list item. 010 Route	
31.	Click the **Reason** drop-down list.	
32.	Click the **Expert Review Requested** list item. Expert Review Requested	
33.	Click in the **Response Due Date** field.	
34.	Enter "**09/15/2015**" into the **Response Due Date** field.	
35.	If the routing request is for a single job opening, the primary hiring manager is the default recipient unless the hiring manager is the person sending the routing request.	
36.	Click in the **Comments** field.	
37.	Enter "**Please review.**" into the **Comments** field.	
38.	Click the **Submit** button. Submit	
39.	Click the **OK** button. OK	
40.	Click the **Home** link. Home	
41.	Click the **Sign out** link. Sign out	
42.	You have completed the topic "Routing Applicants". **End of Procedure.**	

Rejecting an Applicant

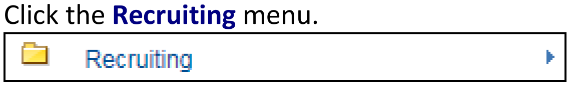
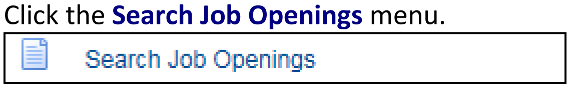
Rejecting an Applicant

This topic will demonstrate the process for rejecting an applicant for a specific Job ID and supplying a reason for rejection.



Procedure

This topic will demonstrate the process for rejecting an applicant for a specific Job ID and supplying a reason for rejection.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Search Job Openings** menu. 	

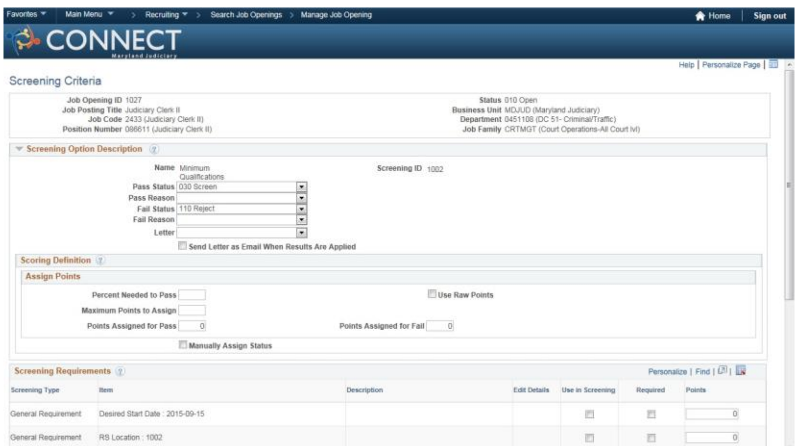
Step	Action	Notes
9.	Click in the **Job Opening ID** field.	
10.	Enter "**1024**" into the **Job Opening ID** field.	
11.	Click the **Search** button. Search	
12.	Click the **Judiciary Clerk II** link. Judiciary Clerk II	
13.	Click the **Manage Application** button for ANTINETTE GARY.	
14.	Click the **Reject** link. Reject	
15.	A reason is required when rejecting an applicant. Click the **Reason** drop-down list.	
16.	Click the **Underqualified** list item. Underqualified	
17.	Click the **Reject and Correspond** button. Reject and Correspond	
18.	Click the **Letter** drop-down list.	
19.	Click the **Applicant Rejection Letter IR** list item. Applicant Rejection Letter IR	
20.	Click in the **Subject** field.	
21.	Enter "**AOC Job Applicant**" into the **Subject** field.	
22.	Click the **Preview** button. Preview	
23.	Click the **Vertical** scroll bar to move down the page.	
24.	Click the **Send** button. Send	
25.	Click the **OK** button. OK	
26.	Click the **Home** link. Home	

Step	Action	Notes
27.	Click the **Sign out** link. 	
28.	You have completed the topic "Rejecting an Applicant". **End of Procedure.**	

Screening Applicants

Screening Applicants

This topic will demonstrate the process for screening applicants. Screening is the process used by recruiters to evaluate a list of potential candidates and narrow the list to a few qualified applicants that can be interviewed or hired. Prescreening is a special use of screening that can filter out applicants even before they submit an application.



Procedure

In this topic, a recruiter will screen applicants using minimum qualification questions.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Enter "**welcome1**" into the **Password** field.	
4.	Click the **Sign In** button. 	
5.	Click the **Main Menu** button. 	

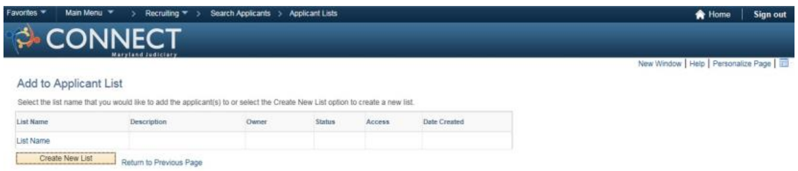
Step	Action	Notes
6.	Click the **Recruiting** menu. Recruiting	
7.	Click the **Search Job Openings** menu. Search Job Openings	
8.	Enter "**1027**" into the **Job Opening ID** field.	
9.	Click the **Search** button. Search	
10.	Click the **Judiciary Clerk II** link. Judiciary Clerk II	
11.	Click the **Applicant Screening** tab. Applicant Screening	
12.	Click the **Minimum Qualifications** link. Minimum Qualifications	
13.	Click in the **Percent Needed to Pass** field.	
14.	Enter "**100**" into the **Percent Needed to Pass** field.	
15.	Click the **Vertical** scroll bar to move down the page.	
16.	CONNECT allows you to choose multiple screening types to use in screening and/or make them a required question or general requirement.	
17.	Click the **Use in Screening** option for the Work Authorization Screening Question.	
18.	Click the **Required** option.	
19.	Click the **Apply** button. Apply	
20.	Click the **OK** button. OK	
21.	Click the **Run** drop-down list. Select...	
22.	Click the **Minimum Qualifications** list item. Minimum Qualifications	
23.	Click the **Go** button. Go	

Step	Action	Notes
24.	Click the **Refresh Page** button.	
25.	Click the **Screening Results** link. Screening Results	
26.	This page shows the applicants for the job opening and their scores for the requirements.	
27.	Click the **0%** link. 0%	
28.	This page will show detailed information for the requirement score.	
29.	Click the **Vertical** scroll bar to move down the page.	
30.	Click the **Return to Previous Page** link. Return to Previous Page	
31.	Click the **Apply Results** button. Apply Results	
32.	When the screening results are applied, and the applicant does not meet the minimum qualifications, their disposition will change accordingly.	
33.	Click the **OK** button. OK	
34.	Click the **Home** link. Home	
35.	Click the **Sign out** link. Sign out	
36.	You have completed the topic "Screening Applicants". **End of Procedure.**	

Adding an Applicant to a List

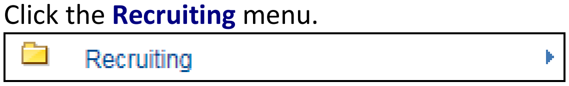
Adding an Applicant to a List

This topic will demonstrate the process for adding an applicant to a list. Applicant lists are manually-constructed groups of applicants that recruiters can use to facilitate the Recruiting process. Recruiters can add applicants to a list and then perform tasks for one, several, or all applicants on the list at the same time.



Procedure

In this topic, a recruiter will create a list and add an applicant to it.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Search Applicants** menu. 	
9.	Click the **Search My Applicants** option to remove checkbox. 	
10.	By unchecking the "Search My Applicants" box, you are able to see all applicants in CONNECT.	

Step	Action	Notes
11.	Click the **Search** button. Search	
12.	Click the **Select** option next to ISHA BEAZER.	
13.	Click the **Vertical** scroll bar to move down the page.	
14.	Click the **Group Actions** link. Group Actions	
15.	Click the **Add Applicant to List** menu. Add Applicant to List	
16.	CONNECT allows the user to add an applicant either to an existing list or to a new list that you create. In this example, we will create a new list.	
17.	Click the **Create New List** button. Create New List	
18.	Click in the **List Name** field.	
19.	Enter "**Judiciary Clerks**" into the **List Name** field.	
20.	Click in the **Description** field.	
21.	Enter "**List of Judiciary Clerk Potential**" into the **Description** field.	
22.	Click the **Public** option.	
23.	Click the **Save** button. Save	
24.	Click the **Home** link. Home	
25.	Click the **Sign out** link. Sign out	
26.	You have completed the topic "Adding an Applicant to a List". **End of Procedure.**	

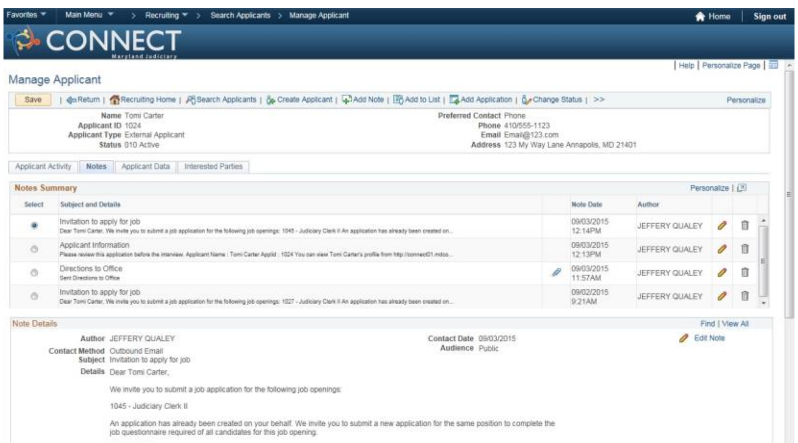
Managing Contact Notes and Attachments

Managing Contact Notes and Attachments

The system automatically creates contact notes when a user generates letters or email during the recruiting process. For example, the system creates contact notes when a user:

- Generates an interview letter.
- Creates an offer letter.
- Forwards an applicant.
- Generates ad hoc correspondence.

When creating notes for letters, the letter itself becomes an attachment to the note. Additionally, users can manually create notes (with optional attachments) to record interactions that were not automatically captured. When creating a note, the user indicates the contact method by choosing from the values that your organization establishes on the Contact Methods Page. For example, contact methods can include inbound or outbound phone calls, emails, faxes, and so on.

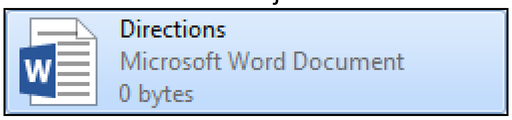
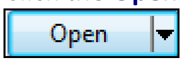
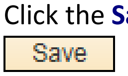


Procedure

In this topic, a recruiter will add a note and attachment to an applicant's file.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	

Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Search Applicants** menu. Search Applicants	
9.	Click in the **Last Name** field.	
10.	Enter "**Carter**" into the **Last Name** field.	
11.	Click the **Search** button. Search	
12.	Click the **Tomi Carter** link. Tomi Carter	
13.	Click the **Notes** tab. Notes	
14.	Click the **Vertical** scroll bar to move down the page.	
15.	Click the **Add Applicant Note** button. Add Applicant Note	
16.	Click the **Contact Method** drop-down list.	
17.	Click the **Outbound Email** list item. Outbound Email	
18.	Click the **Audience** drop-down list.	
19.	Click the **Public** list item. Public	
20.	Click in the **Subject** field.	
21.	Enter "**Directions to Office**" into the **Subject** field.	
22.	Click in the **Details** field.	
23.	Enter "**Sent directions to office.** " into the **Details** field.	
24.	An attachment is not required but in this example, we will add one.	
25.	Click the **Add Attachment** button. Add Attachment	

Step	Action	Notes
26.	Click the **Browse...** button. 	
27.	Click the **Desktop** tree item. 	
28.	Click the **Directions** object. 	
29.	Click the **Open** object. 	
30.	Click the **Upload** button. 	
31.	Click in the **Description** field.	
32.	Enter "**Directions to office with map**" into the **Description** field.	
33.	Click the **Add Note** button. 	
34.	The notes summary will show you all of the notes for this applicant.	
35.	Click the **Save** button. 	
36.	Click the **Home** link. 	
37.	Click the **Sign out** link. 	
38.	You have completed the topic "Managing Contact Notes and Attachments". **End of Procedure.**	

Scheduling Interviews

Scheduling Interviews

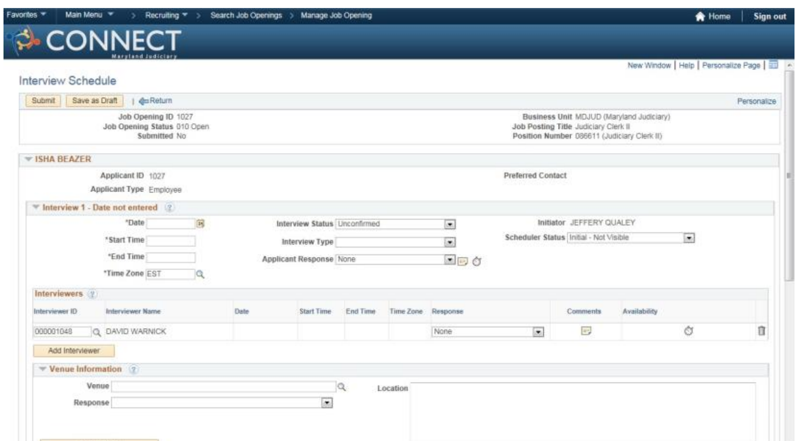
There are different processes that can be done to schedule interviews. This section will cover three different ways in which a recruiter can schedule an interview. The three ways are:

- Scheduling Applicant Interviews
- Scheduling an Interview by Department, and
- Scheduling an Interview by Job Family

Scheduling Applicant Interviews

Scheduling Applicant Interviews

This topic will demonstrate the process for scheduling an applicant interview. You can schedule applicant interviews at any time in the recruiting process, whether or not the applicant is associated with a job opening.



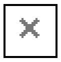
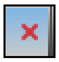
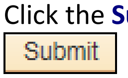
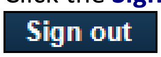
Procedure

In this topic, a recruiter will schedule an applicant interview.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Search Job Openings** menu. Search Job Openings	
9.	Click in the **Job Opening ID** field.	
10.	Enter "**1027**" into the **Job Opening ID** field.	
11.	Click the **Search** button. Search	
12.	Click the **Judiciary Clerk II** link. Judiciary Clerk II	
13.	Click the **Manage Interviews** button.	
14.	Click in the **Date** field.	
15.	Enter "**09/15/2015**" into the **Date** field.	
16.	Click in the **Start Time** field.	
17.	Enter "**10:30AM**" into the **Start Time** field.	
18.	Click the **End Time** field.	
19.	Enter "**11:30AM**" into the **End Time** field.	
20.	Click the **Interview Type** drop-down list.	
21.	Click the **Onsite Interview** list item. Onsite Interview	
22.	Because this interview has a job opening attached, the Interviewer will auto-populate with the hiring manager attached to that job opening.	

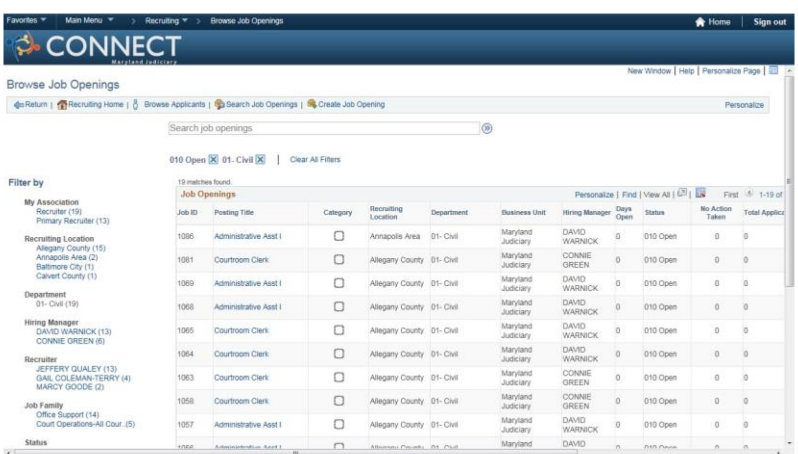
Step	Action	Notes
23.	Click the **Add Interviewer** button. Add Interviewer	
24.	Enter "**000000828**" into the **Interviewer ID** field.	
25.	Click the **Availability** button.	
26.	The Interview Schedule page shows that Connie Green has open availability.	
27.	Click the **Return** button. Return	
28.	Click the **Availability** button.	
29.	Click the **Return** button. Return	
30.	Click the **Comments** button for DAVID WARNICK.	
31.	Enter "**Please let me know if this time conflicts with another appointment.**" into the **Comments** field.	
32.	Click the **OK** button. OK	
33.	Click the **Vertical** scroll bar to move down the page.	
34.	Click in the **Location** field.	
35.	Enter "**508 Taylor Avenue Annapolis, MD 21401**" into the **Location** field.	
36.	Click the **Letter** drop-down list.	
37.	Click the **Interview Letter IS1** list item. Interview Letter IS1	
38.	Click in the **Date Printed** field.	
39.	Enter "**09/03/2015**" into the **Date Printed** field.	
40.	You will not be able to view the Interview Letter until you save the page.	
41.	Click the **Save as Draft** button. Save as Draft	
42.	Click the **Vertical** scroll bar to move down the page.	

Step	Action	Notes
43.	Click the **Generate Letter** button. 	
44.	Click the **Open** button. 	
45.	Click the **X** button. 	
46.	Click the **X** to exit out of tab. 	
47.	Click the **Submit** button. 	
48.	Click the **OK** button. 	
49.	Click the **Home** link. 	
50.	Click the **Sign out** link. 	
51.	You have completed the topic "Scheduling Applicant Interviews". **End of Procedure.**	

Scheduling an Interview by Department

Scheduling an Interview by Department

This topic will demonstrate the process for scheduling an applicant interview based on specific filtering criteria. In this topic, we will filter by job department.



Procedure

In this topic, the recruiter will schedule an applicant's interview and filter by the department.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Recruiting** menu. Recruiting	
8.	Click the **Browse Job Openings** menu. Browse Job Openings	
9.	The Browse Job Openings page gives you many different options to filter by. In this example, we will filter by Department.	
10.	Click the **01- Civil (19)** tree item. 01- Civil (19)	
11.	Click the **Vertical** scroll bar to move down the page.	
12.	Click the **Administrative Asst I** link. Administrative Asst I	
13.	Click the **Interview** object for John Brown.	
14.	Click in the **Date** field.	
15.	Enter "**09/17/2015**" into the **Date** field.	
16.	Click in the **Start Time** field.	
17.	Enter "**9:00AM**" into the **Start Time** field.	

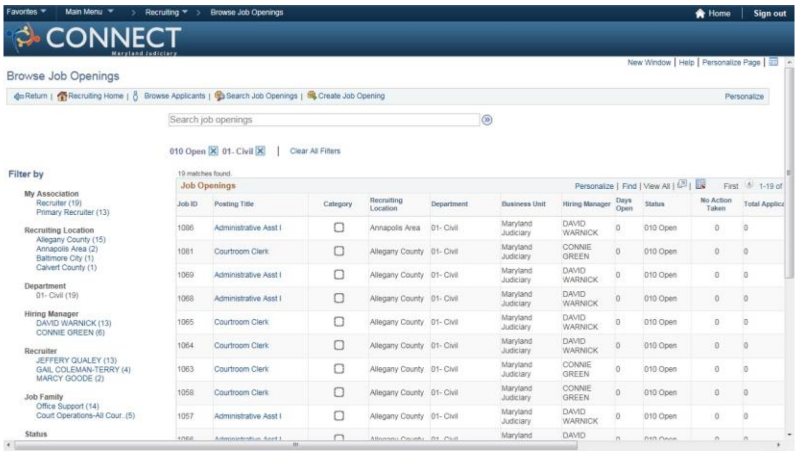
Step	Action	Notes
18.	Click in the **End Time** field.	
19.	Enter "**10:00AM**" into the **End Time** field.	
20.	Click the **Interview Type** drop-down list.	
21.	Click the **Onsite Interview** list item. Onsite Interview	
22.	Because this interview has a job opening attached, the Interviewer will auto-populate with the hiring manager attached to that job opening.	
23.	Click the **Add Interviewer** button. Add Interviewer	
24.	Click in the **Interviewer ID** field.	
25.	Enter "**000000828**" into the **Interviewer ID** field.	
26.	Click the **000000828** object. 000000828	
27.	Click the **Availability** button.	
28.	The Interview Schedule page shows that Connie Green has open availability.	
29.	Click the **Return** button. Return	
30.	Click in the **Comments** field under Connie Green.	
31.	Enter "**Please let me know if this time conflicts with another appointment.** " into the **Comments** field.	
32.	Click the **OK** button. OK	
33.	Click the **Vertical** scroll bar to move down the page.	
34.	Click in the **Location** field.	
35.	Enter "**AOC ROOM: 508 Taylor Avenue, Annapolis, MD 21401**" into the **Location** field.	
36.	Click the **Letter** drop-down list.	

Step	Action	Notes
37.	Click the **Interview Letter IS1** list item. Interview Letter IS1	
38.	Click in the **Date Printed** field.	
39.	Click the **Choose a date** button.	
40.	Click the **Calendar** object. 14	
41.	You will not be able to view the Interview Letter until you save the page.	
42.	Click the **Save as Draft** button. Save as Draft	
43.	Click the **Vertical** scroll bar to move down the page.	
44.	Click the **Generate Letter** button. Generate Letter	
45.	Click the **Open** object. Open	
46.	Click the **X** object. ×	
47.	Click the **Submit** button. Submit	
48.	Click the **OK** button. OK	
49.	Click the **Home** link. Home	
50.	Click the **Sign out** link. Sign out	
51.	You have completed the topic "Scheduling an Interview by Department". **End of Procedure.**	

Scheduling an Interview by Job Family

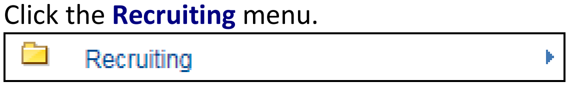
Scheduling an Interview by Job Family

This topic will demonstrate the process for scheduling an applicant interview based on specific filtering criteria. In this topic, we will filter by job family.



Procedure

In this topic, the recruiter will schedule an applicant's interview and filter by the job family.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Browse Job Openings** menu. 	

Step	Action	Notes
9.	The Browse Job Openings page gives you many different options to filter by. In this example, we will filter by Job Family.	
10.	Click the **Vertical** scroll bar to move down the page.	
11.	Click the **Office Support (25)** tree item. Office Support (25)	
12.	Click the **Administrative Asst I** link. Administrative Asst I	
13.	Click the **Manage Interviews** button for REBECCA MILLER.	
14.	Click in the **Date** field.	
15.	Enter "**09/17/2015**" into the **Date** field.	
16.	Click in the **Start Time** field.	
17.	Enter "**10:00AM**" into the **Start Time** field.	
18.	Click in the **End Time** field.	
19.	Enter "**11:00AM**" into the **End Time** field.	
20.	Click the **Interview Type** drop-down list.	
21.	Click the **Onsite Interview** list item. Onsite Interview	
22.	Because this interview has a job opening attached, the Interviewer will auto-populate with the hiring manager attached to that job opening.	
23.	Click the **Add Interviewer** button. Add Interviewer	
24.	Click in the **Interviewer ID** field.	
25.	Enter "**000000828**" into the **Interviewer ID** field.	
26.	Click the **000000828** object. 000000828	
27.	Click the **Availability** button.	

Step	Action	Notes
28.	The Interview Schedule page shows that Connie Green has an interview from 9 to 10 am with John Brown.	
29.	Click the **Return** button. Return	
30.	Click the **Comments** button.	
31.	Enter "**Please let me know if this time conflicts with another appointment.** " into the **Comments** field.	
32.	Click the **OK** button. OK	
33.	Click the **Availability** button.	
34.	Click the **Return** button. Return	
35.	Scroll down the page.	
36.	Click in the **Location** field.	
37.	Enter "**508 Taylor Avenue, Annapolis, MD 21401**" into the **Location** field.	
38.	Scroll down the page.	
39.	Click the **Letter** drop-down list.	
40.	Click the **Interview Letter IS1** list item. Interview Letter IS1	
41.	Click the **Choose a date** button.	
42.	You will not be able to view the Interview Letter until you save the page.	
43.	Click the **Date** object. 14	
44.	Click the **Save as Draft** button. Save as Draft	
45.	Click the **Vertical** scroll bar to move down the page.	
46.	Click the **Generate Letter** button. Generate Letter	

Step	Action	Notes
47.	Click the **Open** object. Open	
48.	Click the **X** object. ✕	
49.	Click the **Submit** button. Submit	
50.	Click the **OK** button. OK	
51.	Click the **Home** link. Home	
52.	Click the **Sign out** link. Sign out	
53.	You have completed the topic "Scheduling an Interview by Job Family". **End of Procedure.**	

Conducting Interviews and Selecting Final Applicants

The Conducting Interviews and Selecting Final Applicants section will demonstrate the processes for:

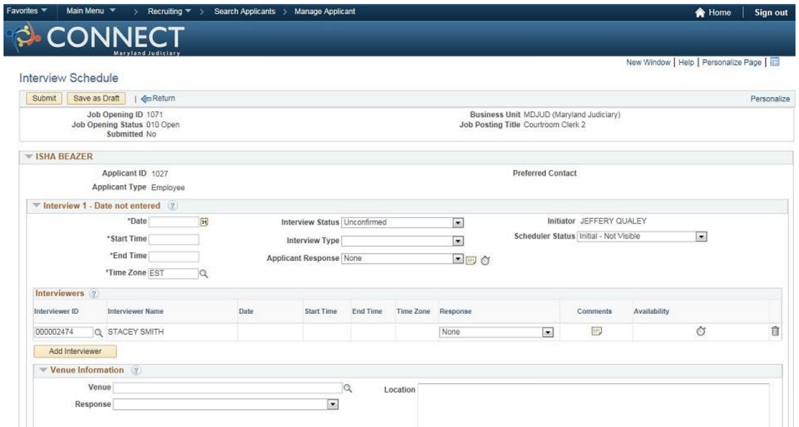
- Reviewing interview schedules and evaluations
- Completing an interview evaluation, and
- Recording the final interview recommendation
- Ranking an Applicant

Connect allows users to look at the applicant's interview schedule and evaluations, complete their own evaluations, and also record the final interview recommendations for the applicant.

Reviewing Interview Schedules and Evaluations

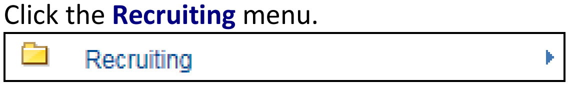
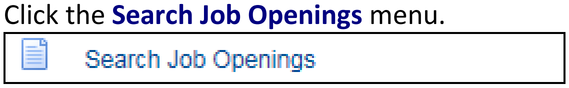
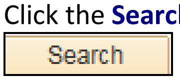
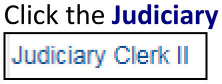
Reviewing Interview Schedules and Evaluations

This topic will demonstrate the process of reviewing a specific applicant's interview schedule (such as date and time) and also evaluations given by the interviewer.



Procedure

In this topic, a Hiring Manager reviews Interview Schedules and Interview Evaluations.

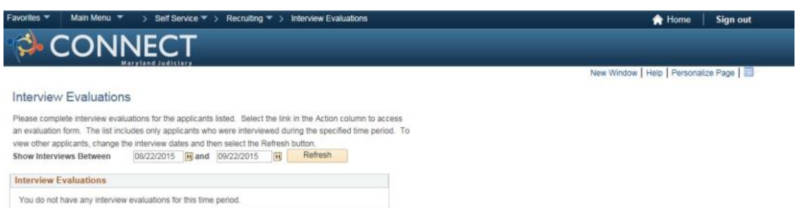
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Search Job Openings** menu. 	
9.	Click in the **Job Opening ID** field. 	
10.	Enter "**1024**" into the **Job Opening ID** field.	
11.	Click the **Search** button. 	
12.	Click the **Judiciary Clerk II** link. 	

Step	Action	Notes
13.	Click the **Interview** icon for applicant.	
14.	Review the Interview Summary and Interview Details for the selected applicant.	
15.	Click the **Home** link. Home	
16.	Click the **Sign out** link. Sign out	
17.	You have completed the topic "Reviewing Interview Schedules and Evaluations". **End of Procedure.**	

Completing an Interview Evaluation

Completing an Interview Evaluation

This topic will demonstrate the process for completing an Interview Evaluation. Interview evaluations are specific to the context of a particular job opening (or an application without a job opening). To complete an evaluation, evaluators assign ratings for individual evaluation categories, give an overall rating and recommendation, and enter any comments.



Procedure

In this topic, the Hiring Manager begins and completes an Interview Evaluation.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	

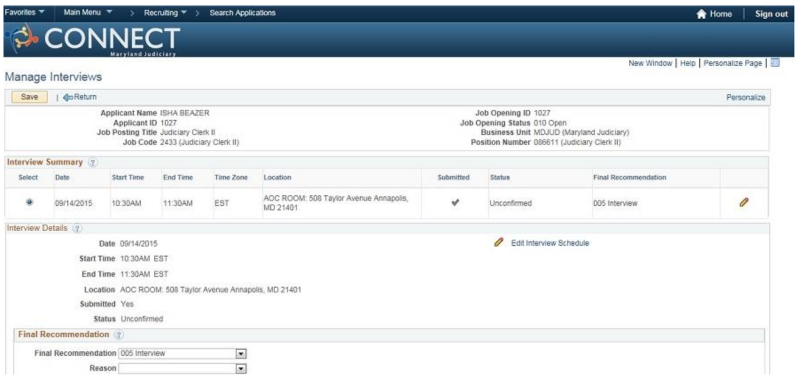
Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Self Service** menu. Self Service	
8.	Click the **Recruiting** menu. Recruiting	
9.	Click the **Interview Evaluations** menu. Interview Evaluations	
10.	A specified time period must be entered in order to view applicants.	
11.	Click in the **Show Interviews Between** field.	
12.	Enter "**09/01/2015**" into the **Show Interviews Between** field.	
13.	Click in the **and** field.	
14.	Enter "**10/01/2015**" into the **and** field.	
15.	Click the **Refresh** button. Refresh	
16.	Click the **Evaluate Applicant** link. Evaluate Applicant	
17.	Click the **Interview Rating** drop-down list for Communications skills.	
18.	Click the **Excellent** list item. Excellent	
19.	Click the **Interview Rating** drop-down list for Education/Training.	
20.	Click the **Excellent** list item. Excellent	
21.	Click the **Vertical** scroll bar to move down the page.	
22.	Click the **Interview Rating** drop-down list for Work Experience.	

Step	Action	Notes
23.	Click the **Excellent** list item. Excellent	
24.	Click the **Interview Rating** drop-down list for Technical Skills.	
25.	Click the **Excellent** list item. Excellent	
26.	Click the **Vertical** scroll bar to move up the page.	
27.	Click the **Overall Rating** drop-down list.	
28.	Click the **Excellent** list item. Excellent	
29.	Click the **Recommendation** drop-down list.	
30.	Click the **020 Make Offer** list item. 020 Make Offer	
31.	Click in the **Comments** field.	
32.	Enter "**Great Candidate.** " into the **Comments** field.	
33.	Click the **Submit** button. Submit	
34.	Click the **Home** link. Home	
35.	Click the **Sign out** link. Sign out	
36.	You have completed the topic "Completing an Interview Evaluation". **End of Procedure.**	

Recording the Final Interview Recommendation

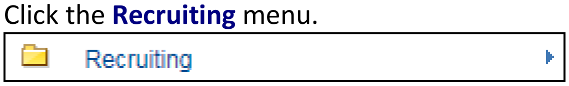
Recording the Final Interview Recommendation

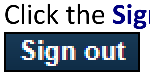
This topic will demonstrate the process of giving a final interview recommendation for an applicant. Examples of recommendations are "Make Offer", "Reject", or "Hold".



Procedure

In this topic, the Hiring Manager completes the Final Interview Recommendation.

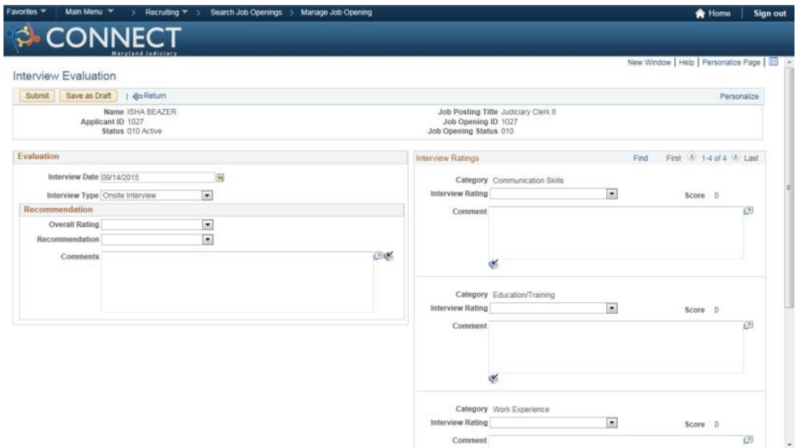
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**david.warnick**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Search Applications** menu. 	
9.	Click the **Search My Applicants** box to uncheck. 	

Step	Action	Notes
10.	Click in the **Last Name** field. 	
11.	Enter "**Baezer**" into the **Last Name** field.	
12.	Click the **Search** button. 	
13.	Click the **Manage Interviews** button. 	
14.	The Manage Interviews page will give you access to the date and time of the interview as well as interview details.	
15.	Click the **Final Recommendation** drop-down list. 	
16.	Click the **020 Make Offer** list item. 	
17.	Click the **Save** button. 	
18.	Click the **Home** link. 	
19.	Click the **Sign out** link. 	
20.	You have completed the topic "Recording the Final Interview Recommendation". **End of Procedure.**	

Ranking an Applicant

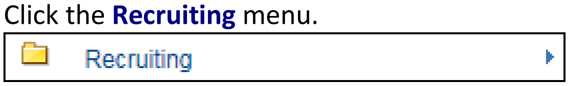
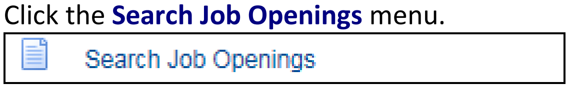
Ranking an Applicant

This topic demonstrates the process for ranking applicants by completing and submitting an interview evaluation.



Procedure

In this topic, a recruiter will rank an applicant by completing an Interview Evaluation.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**jeffery.qualey**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Search Job Openings** menu. 	
9.	Click in the **Job Opening ID** field.	

Step	Action	Notes
10.	Enter "**1027**" into the **Job Opening ID** field.	
11.	Click the **Search** button. Search	
12.	Click the **Judiciary Clerk II** link. Judiciary Clerk II	
13.	Click the **ISHA BEAZER** option.	
14.	Click the **Group Actions** link. Group Actions	
15.	Click the **Recruiting Actions** menu. Recruiting Actions	
16.	Click the **Create Interview Evaluation** menu. Create Interview Evaluation	
17.	The Interview Evaluation page has several Interview Ratings and a Final Recommendation that should be filled out for each applicant.	
18.	Click the **Interview Rating** drop-down list for Technical Skills.	
19.	Click the **Excellent** list item. Excellent	
20.	Click the **Interview Rating** drop-down list for Education/Training.	
21.	Click the **Excellent** list item. Excellent	
22.	Click the **Vertical** scroll bar to move down the page.	
23.	Click the **Interview Rating** drop-down list for Work Experience.	
24.	Click the **Excellent** list item. Excellent	
25.	Click the **Interview Rating** drop-down list for Technical Skills.	
26.	Click the **Excellent** list item. Excellent	
27.	Click the **Vertical** scroll bar to move up the page.	
28.	Click the **Overall Rating** drop-down list.	

Step	Action	Notes
29.	Click the **Excellent** list item. Excellent	
30.	Click the **Recommendation** drop-down list.	
31.	Click the **020 Make Offer** list item. 020 Make Offer	
32.	Click in the **Comments** field.	
33.	Enter "**Great Candidate: Extend Offer.** " into the **Comments** field.	
34.	Click the **Submit** button. Submit	
35.	Click the **OK** button. OK	
36.	Click the **Home** link. Home	
37.	Click the **Sign out** link. Sign out	
38.	You have completed the topic "Ranking an Applicant". **End of Procedure.**	

Presenting and Managing Offers

The Presenting and Managing Offers topic discusses processes for:

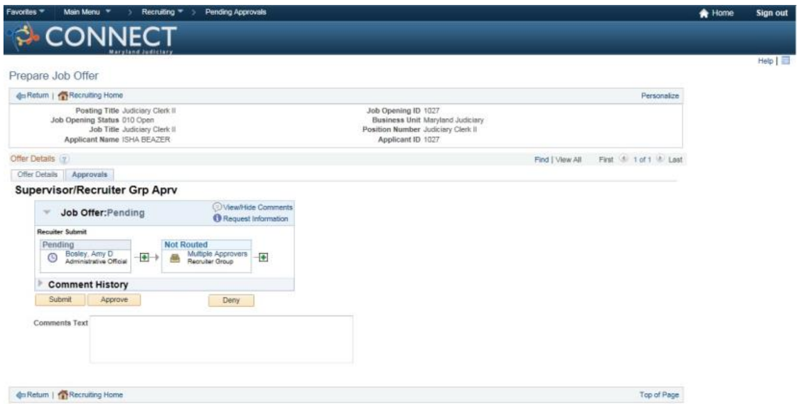
- Approving and denying job offers
- Delegating job offer and job openings approval
- Accepting, rejecting, revoking and reviewing various delegations

Connect allows the users to approve or deny job offers sent to them from recruiters. Managers can also delegate certain job responsibilities to another employee for a specified period of time. Conversely, they can accept or reject responsibilities delegated to them. They can also review and revoke specific delegations.

Approving a Job Offer

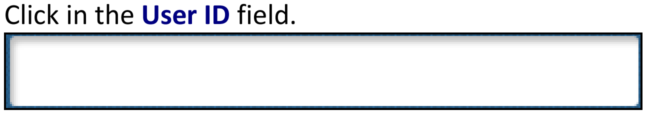
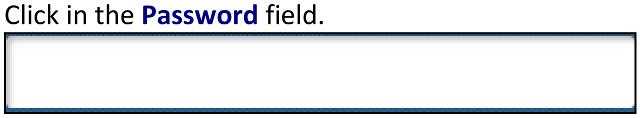
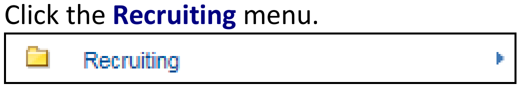
Approving a Job Offer

This topic will demonstrate the process of approving a job offer that has been submitted by a recruiter. Connect records the approval and notifies the next approver, if any.



Procedure

In this topic, an Administrative Official approves a job offer from the Recruiter.

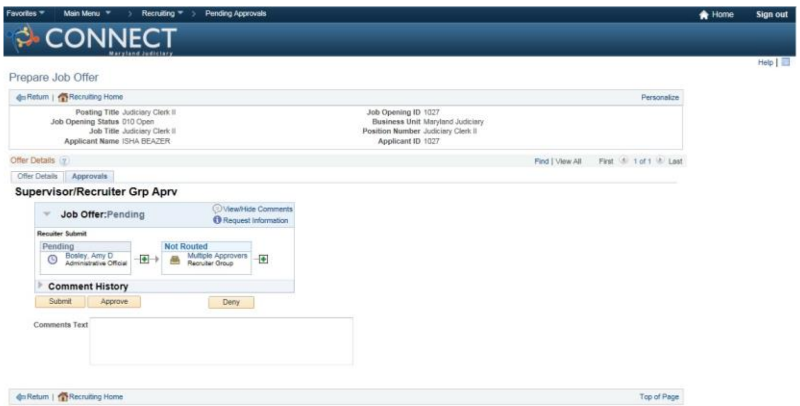
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**amy.bosley**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Pending Approvals** menu. 	

Step	Action	Notes
9.	The "Pending Approvals" page allows the Administrative Official view **all** subjects routed to them.	
10.	Click the **Offer Approval:ISHA BEAZER** link. Offer Approval:ISHA BEAZER	
11.	The "Prepare Job Offer" page allows the user to review the Offer Details prior to approval.	
12.	Click the **Approvals** tab. Approvals	
13.	Click the **Approve** button. Approve	
14.	Click the **Submit** button. Submit	
15.	Click the **OK** button. OK	
16.	Click the **Home** link. Home	
17.	Click the **Sign out** link. Sign out	
18.	You have completed the topic "Approving a Job Offer". **End of Procedure.**	

Denying a Job Offer

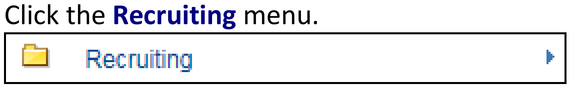
Denying a Job Offer

This topic demonstrates the process for denying a job offer that has been submitted by a recruiter. Connect will set the job offer status to *Denied*, stops the progress of the job offer, and notifies the requester.



Procedure

In this topic, an Administrative Official denies a job offer from the Recruiter.

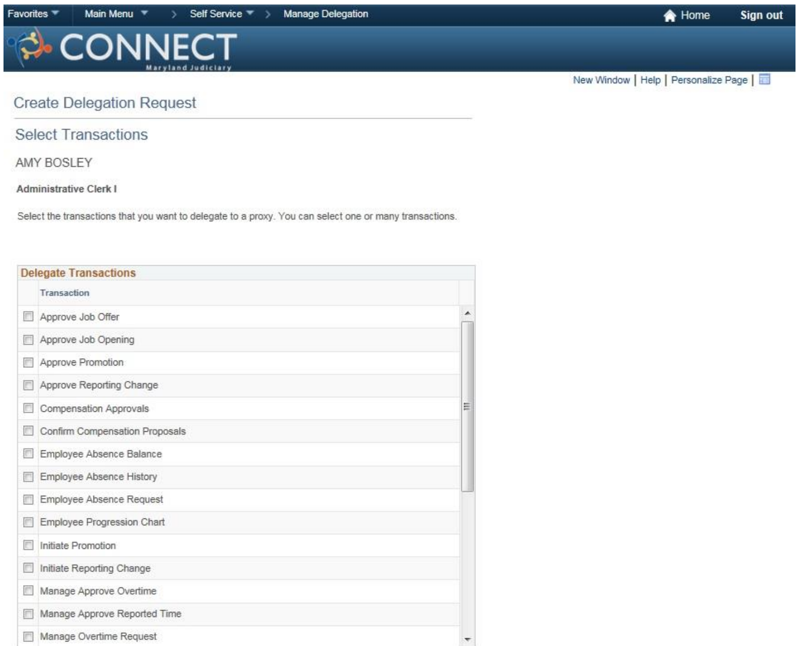
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**dennis.scott**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Recruiting** menu. 	
8.	Click the **Pending Approvals** menu. 	
9.	Click the **Offer Approval:John Brown** link. 	

Step	Action	Notes
10.	The "Prepare Job Offer" page provides Offer Details to review prior to approval.	
11.	Click the **Approvals** tab. Approvals	
12.	A comment must be provided prior to denial. Connect will not allow a user to deny without a reason.	
13.	Click in the **Comments Text** field.	
14.	Enter "**Candidate is underqualified.**" into the **Comments Text** field.	
15.	Click the **Deny** button. Deny	
16.	Click the **Home** link. Home	
17.	Click the **Sign out** link. Sign out	
18.	You have completed the topic "Denying a Job Offer". **End of Procedure.**	

Delegate Transactions

Delegating Job Offer and Opening Approvals

This topic demonstrates the process for delegating transactions. Connect uses delegation to authorize on person to serve as another person's representative when performing specific job duties.



Procedure

In this topic, an Administrative Official delegates approval responsibilities for Job Offers and Job Openings to a Hiring Manager.

Step	Action	Notes
19.	Click in the **User ID** field.	
20.	Enter "**amy.bosley**" into the **User ID** field.	
21.	Click in the **Password** field.	
22.	Enter "**welcome1**" into the **Password** field.	
23.	Click the **Sign In** button. 	

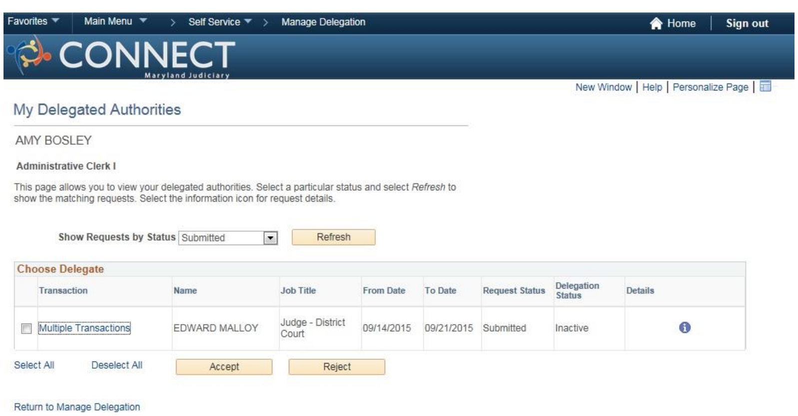
Step	Action	Notes
24.	Click the **Main Menu** button. Main Menu	
25.	Click the **Self Service** menu. Self Service	
26.	Click the **Manage Delegation** menu. Manage Delegation	
27.	Click the **Create Delegation Request** link. Create Delegation Request	
28.	A date range must be entered in order to delegate responsibilities.	
29.	Click in the **From Date** field. 09/08/2015	
30.	Press **[Backspace]**.	
31.	Enter "**11/20/2015**" into the **From Date** field.	
32.	Click in the **To Date** field.	
33.	Enter "**11/30/2015**" into the **To Date** field.	
34.	Click the **Next** button. Next	
35.	Here, you are able to delegate multiple responsibilities. In this example, we will delegate the "Approve Job Offer" and "Approve Job Opening" responsibilities.	
36.	Click the **Approve Job Offer** option.	
37.	Click the **Approve Job Opening** option.	
38.	Click the **Vertical** Scroll bar to move down the page.	
39.	Click the **Next** button. Next	
40.	Click the **DAVID WARNICK** option.	
41.	Click the **Vertical** Scroll bar to move down the page.	
42.	Click the **Next** button. Next	

Step	Action	Notes
43.	Before submitting, review the Delegation Detail page to confirm the information is correct.	
44.	Click the **Submit** button. 	
45.	Click the **OK** button. 	
46.	Click the **Home** link. 	
47.	Click the **Sign out** link. 	
48.	You have completed the topic "Delegating Job Offer and Opening Approvals". **End of Procedure.**	

Accepting or Rejecting Delegation Authorities

Accepting or Rejecting Delegation Authorities

This topic demonstrates the process of accepting or rejecting a delegation request. A delegation is the act of giving one's authority to another user.



Procedure

In this topic, an Administrative Official accepts the responsibility for Job Offers and Job Openings approvals.

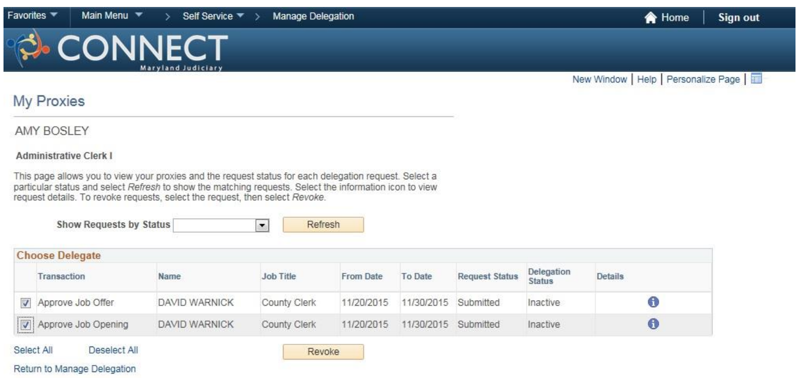
Step	Action	Notes
49.	Click in the **User ID** field.	
50.	Enter "**amy.bosley**" into the **User ID** field.	
51.	Click in the **Password** field.	
52.	Enter "**welcome1**" into the **Password** field.	
53.	Click the **Sign In** button. Sign In	
54.	Click the **Main Menu** button. Main Menu	
55.	Click the **Self Service** menu. Self Service	
56.	Click the **Manage Delegation** menu. Manage Delegation	
57.	Click the **Review My Delegated Authorities** link. Review My Delegated Authorities	
58.	Click the **Multiple Transactions** link. Multiple Transactions	
59.	The Multiple Transactions page will appear. Review to find out which transactions are being delegated and who is delegating them to you.	
60.	Click the **Return** button. Return	
61.	Click the **Multiple Transactions** option.	
62.	Here, you can either Accept or Reject the delegated authority. In this example we will Accept.	
63.	Click the **Accept** button. Accept	
64.	Click the **OK** button. OK	
65.	Click the **Home** link. Home	

Step	Action	Notes
66.	Click the **Sign out** link. Sign out	
67.	You have completed the topic "Accepting or Rejecting Delegation Authorities". **End of Procedure.**	

Revoking Delegation Proxies

Revoking Delegation Proxies

This topic will demonstrate the process for a delegator withdrawing delegated authority. When a person is granted authority to act on behalf of another user, that person is deemed a proxy.



Procedure

In this topic, an Administrative Official revokes the responsibility for Job Offers and Job Openings Approvals.

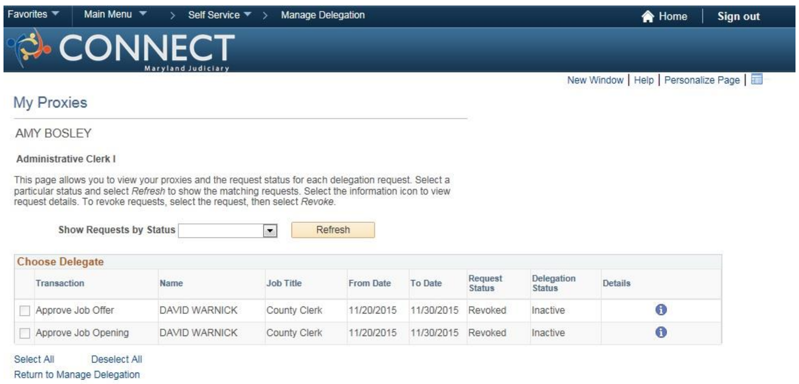
Step	Action	Notes
68.	Click in the **User ID** field.	
69.	Enter "**amy.bosley**" into the **User ID** field.	
70.	Click in the **Password** field.	
71.	Enter "**welcome1**" into the **Password** field.	
72.	Click the **Sign In** button. Sign In	

Step	Action	Notes
73.	Click the **Main Menu** button. Main Menu	
74.	Click the **Self Service** menu. Self Service	
75.	Click the **Manage Delegation** menu. Manage Delegation	
76.	Click the **Review My Proxies** link. Review My Proxies	
77.	All proxies are listed in the "My Proxies" page. You now have the opportunity to select the delegation requests that you wish to revoke.	
78.	Click the **Approve Job Offer** option.	
79.	Click the **Approve Job Opening** option.	
80.	Click the **Revoke** button. Revoke	
81.	Click the **Yes - Continue** button. Yes - Continue	
82.	Click the **OK** button. OK	
83.	Click the **Home** link. Home	
84.	Click the **Sign out** link. Sign out	
85.	You have completed the topic "Revoking Delegation Proxies". **End of Procedure.**	

Reviewing Delegation Proxies

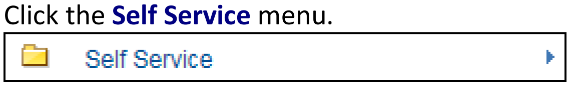
Reviewing Delegation Proxies

This topic demonstrates the process for reviewing your proxies. In Connect, you are able to view their name, job title, and delegation period and delegation authority.



Procedure

In this topic, an Administrative Official reviews the delegated responsibility for Job Offers and Job Openings Approvals.

Step	Action	Notes
86.	Click in the **User ID** field.	
87.	Enter "**amy.bosley**" into the **User ID** field.	
88.	Click in the **Password** field.	
89.	Enter "**welcome1**" into the **Password** field.	
90.	Click the **Sign In** button. 	
91.	Click the **Main Menu** button. 	
92.	Click the **Self Service** menu. 	
93.	Click the **Manage Delegation** menu. 	

Step	Action	Notes
94.	Click the **Review My Proxies** link. Review My Proxies	
95.	The "My Proxies" page allows the user to review their proxies.	
96.	Click the **Home** link. Home	
97.	Click the **Sign out** link. Sign out	
98.	You have completed the topic "Reviewing Delegation Proxies". **End of Procedure.**	

Performance Management of Direct Reports

During these learning modules you will review processes:

- Annual Performance Appraisal (APA)
- Performance Improvement Plan (PIP)
- Managing Performance Documents

Annual Performance Appraisal (APA)

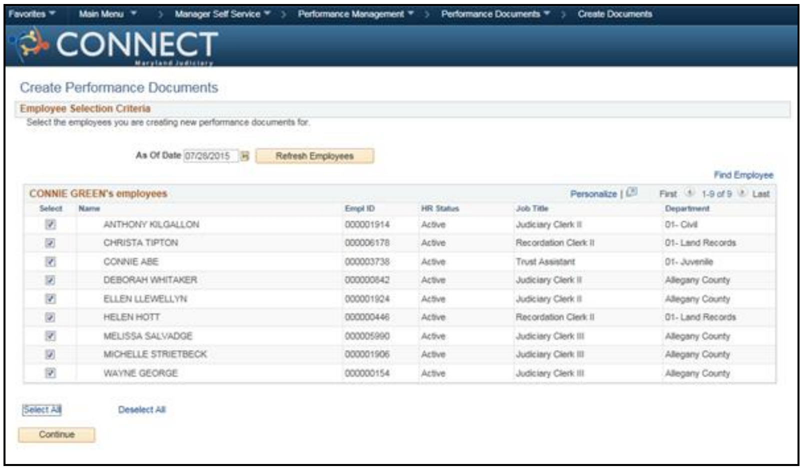
Managers create Annual Performance Appraisal documents for employees and then evaluate the employees based on their performance. The managers then review the document with the employee and the employee acknowledges their performance appraisal. The final approval for the performance document is given by the supervisor's manager. This action completes the Annual Performance Appraisal document.

During this module you will review topics on:

- Create Annual Performance Document (APA)
- Review and Update APA Documents
- Request Acknowledgement of APA Document
- Review and Submit APA Document for Approval
- Review and Approve APA Document by "One Up" Manager
- Review and Print Approved APA Document
- Overriding APA Acknowledgement
- Reviewing Denied APA Documents

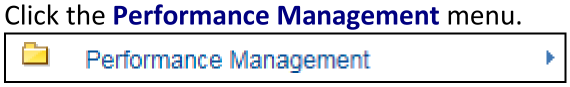
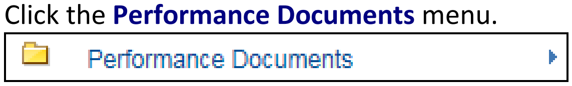
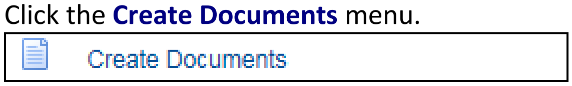
Create Annual Performance Document (APA)

Managers will have the ability to create annual performance documents for their team members in just a few easy steps.



Procedure

In this topic you will go through the steps for creating the annual performance document.

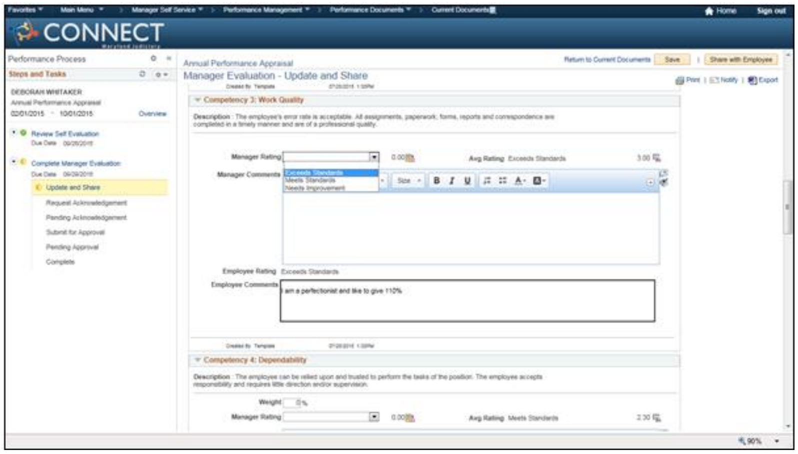
Step	Action	Notes
1.	Enter "**deborah.kiel**" into the **User ID** field.	
2.	Click in the **Password** field.	
3.	Enter "**welcome1**" into the **Password** field.	
4.	Click the **Sign In** button. 	
5.	Click the **Main Menu** button. 	
6.	Click the **Manager Self Service** menu. 	
7.	Click the **Performance Management** menu. 	
8.	Click the **Performance Documents** menu. 	
9.	Click the **Create Documents** menu. 	

Step	Action	Notes
10.	**Note:** Managers are rated on 7 competencies and non-manager employees are rated on 5 competencies. To account for this difference, a separate manager performance document and employee performance document have been created. When creating the performance documents for your team, you will assign the manager and employee documents accordingly.	
11.	In this example, only 1 of Deborah's team members is a Supervisor. The remaining 6 are non-manager employees.	
12.	Click the **Select All** link. Select All	
13.	Click the **Select** checkbox to deselect Ginger Lockhart.	
14.	Click the **Continue** button. Continue	
15.	Click in the **Period Begin Date** field.	
16.	Enter "**01/01/2016**" into the **Period Begin Date** field.	
17.	Click in the **Period End Date** field.	
18.	Enter "**12/31/2016**" into the **Period End Date** field.	
19.	Click the **Document Type** drop-down list.	
20.	Click the **Annual Performance Appraisal** list item. Annual Performance Appraisal	
21.	Click the **Template** drop-down list.	
22.	Click the **Annual Perform Appraisal- Empl** list item. Annual Perform Appraisal- Empl	
23.	Click the **Create Documents** button. Create Documents	
24.	Click the **Create Documents** link. Create Documents	
25.	Click the **Select** checkbox for Ginger Lockhart.	

Step	Action	Notes
26.	Click the **Continue** button. Continue	
27.	Click in the **Period Begin Date** field.	
28.	Enter "**01/01/2016**" into the **Period Begin Date** field.	
29.	Click in the **Period End Date** field.	
30.	Enter "**12/31/2016**" into the **Period End Date** field.	
31.	Click the **Document Type** drop-down list.	
32.	Click the **Annual Performance Appraisal** list item. Annual Performance Appraisal	
33.	Click the **Template** drop-down list.	
34.	Click the **Annual Perform Appraisal - Mgr** list item. Annual Perform Appraisal - Mgr	
35.	Click the **Create Documents** button. Create Documents	
36.	Click the **Current Documents** link. Current Documents	
37.	Click the **Home** link. Home	
38.	Click the **Sign out** link. Sign out	
39.	You have completed the steps for creating the annual performance document. **End of Procedure.**	

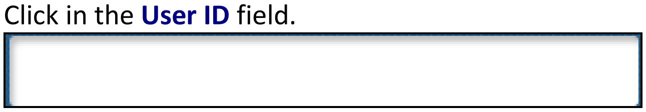
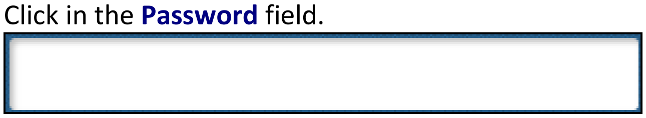
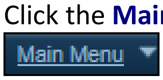
Review and Update APA Documents

Managers will be able to update and share the performance document with employees.



Procedure

In this topic you will go through the steps for reviewing and updating the annual performance appraisal document.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Performance Management** menu. 	

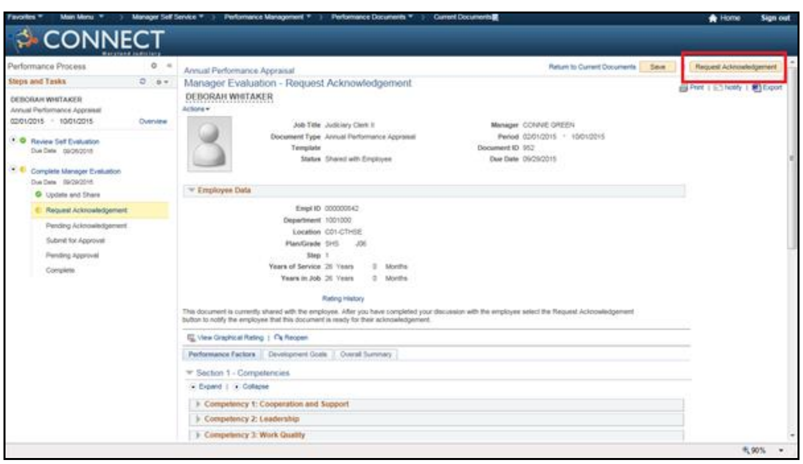
Step	Action	Notes
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **DEBORAH WHITAKER** link. DEBORAH WHITAKER	
12.	Click the **Vertical Scrollbar** to scroll down the page.	
13.	Click the **Expand** link. Expand	
14.	Click the **Manager Rating** list.	
15.	Click the **Meets Standards** list item. Meets Standards	
16.	Click the **Vertical Scrollbar** to scroll down the page.	
17.	Click the **Manager Rating** list.	
18.	Click the **Meets Standards** list item. Meets Standards	
19.	Click the **Vertical Scrollbar** to scroll down the page.	
20.	Click the **Manager Rating** list.	
21.	Click the **Exceeds Standards** list item. Exceeds Standards	
22.	Click the **Vertical Scrollbar** to scroll down the page.	
23.	Click the **Manager Rating** list.	
24.	Click the **Exceeds Standards** list item. Exceeds Standards	
25.	Click the **Vertical Scrollbar** to scroll down the page.	
26.	Click the **Manager Rating** list.	
27.	Click the **Exceeds Standards** list item. Exceeds Standards	
28.	Click the **Vertical Scrollbar** to scroll down the page.	

Step	Action	Notes
29.	Click the **Manager Rating** list.	
30.	Click the **Meets Standards** list item. Meets Standards	
31.	Click in the **Manager Comments** field.	
32.	Enter "**Needs to learn new management techniques that will help improve.**" into the **Manager Comments** field.	
33.	Click the **Vertical Scrollbar** to scroll down the page.	
34.	Click the **Manager Rating** list.	
35.	Click the **Exceeds Standards** list item. Exceeds Standards	
36.	Click the **Vertical Scrollbar** to scroll down the page.	
37.	Click the **Calculate Rating** button.	
38.	Click in the **Manager Comments** field.	
39.	Enter "**Great work and management! New techniques will take you over the top.**" into the **Manager Comments** field.	
40.	Click the **Save** button. Save	
41.	Click the **Vertical Scrollbar** to scroll down the page.	
42.	Click the **Development Goals** tab. Development Goals	
43.	Click the **Expand** link. Expand	
44.	Click the **Edit Details** button.	
45.	Click in the **Employee Measurement** field.	
46.	Enter "**Let's start measuring the learning of new management techniques for 2015.**" into the **Employee Measurement** field.	
47.	Click the **Update** button. Update	
48.	Click the **Vertical Scrollbar** to scroll down the page.	

Step	Action	Notes
49.	Click the **Overall Summary** tab. Overall Summary	
50.	Notice the Manager Rating.	
51.	Click the **Share with Employee** button. Share with Employee	
52.	Click the **Confirm** button. Confirm	
53.	You have completed the employee's Annual Performance Appraisal. Click the **Home** link. Home	
54.	Click the **Sign out** link. Sign out	
55.	You have completed the steps for reviewing and updating the annual performance appraisal document. **End of Procedure.**	

Request Acknowledgement of APA Document

Once both the manager and employee have completed their performance document input and reviewed, the manager will request for the employee acknowledgement, which is their electronic signature.



Procedure

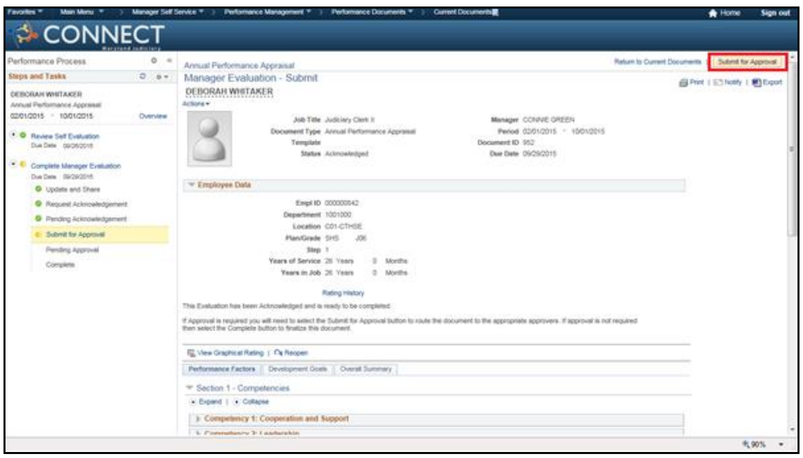
In this topic you will go through the steps for requesting acknowledgement of APA document by employee.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **DEBORAH WHITAKER** link. DEBORAH WHITAKER	
12.	Click the **Request Acknowledgement** button. Request Acknowledgement	
13.	Click the **Confirm** button. Confirm	
14.	You have requested an electronic acknowledgement from the employee for the annual performance appraisal. Click the **Home** link. Home	
15.	Click the **Sign out** link. Sign out	

Step	Action	Notes
16.	You have completed the steps for requesting acknowledgement of APA document by employee. **End of Procedure.**	

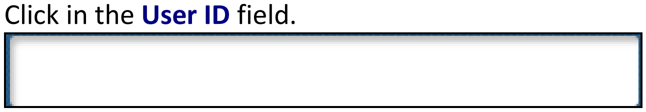
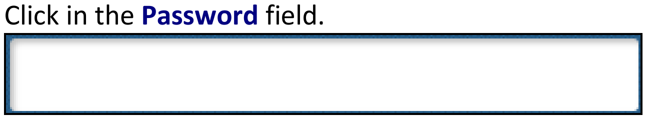
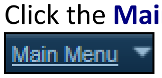
Review and Submit APA Document for Approval

Once the employee acknowledges the performance document, the manager will submit for approval by their manager.



Procedure

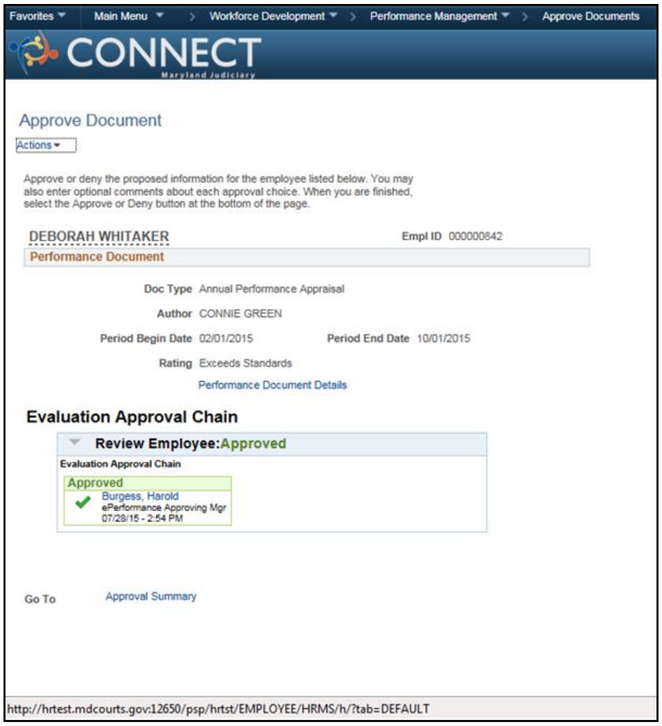
In this topic you will go through the steps for requesting approval of APA document by manager.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	

Step	Action	Notes
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **DEBORAH WHITAKER** link. DEBORAH WHITAKER	
12.	Click the **Submit for Approval** button. Submit for Approval	
13.	Click the **Confirm** button. Confirm	
14.	You have reviewed and submitted the approval of an annual performance appraisal for your employee. Click the **Home** link. Home	
15.	Click the **Sign out** link. Sign out	
16.	You have completed the steps for requesting approval of APA document manager. **End of Procedure.**	

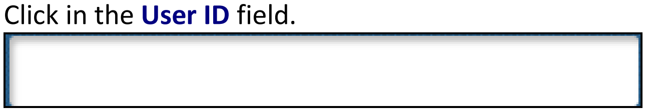
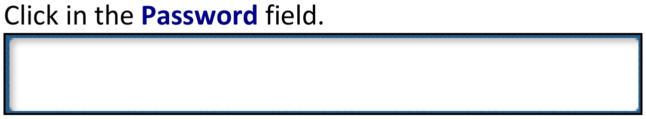
Review and Approve APA Document by "One Up" Manager

The final approver of the performance document is the employee supervisor's manager.



Procedure

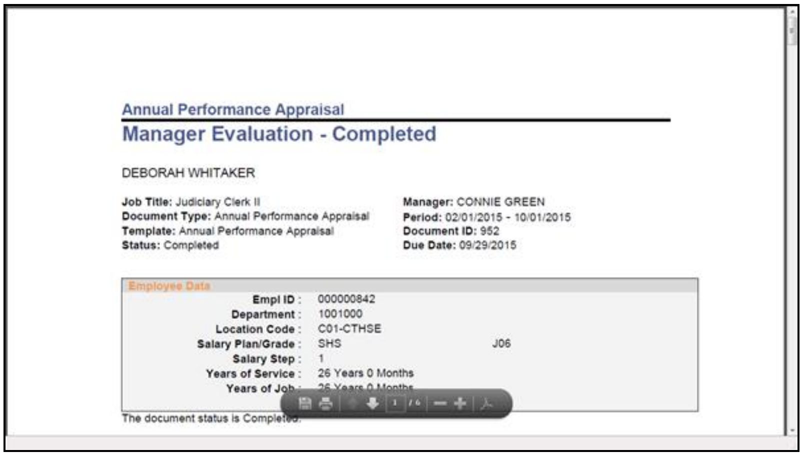
In this topic you will got through the steps to review and approve the completed APA document as the final manager.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**harold.burgess**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	

Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Workforce Development** menu. Workforce Development	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Approve Documents** menu. Approve Documents	
10.	Click the **DEBORAH WHITAKER** link. DEBORAH WHITAKER	
11.	Click the **Performance Document Details** link. Performance Document Details	
12.	Click the **Overall Summary** tab. Overall Summary	
13.	Notice the Manager Rating.	
14.	Click the **Close** button.	
15.	Click the **Approve** button. Approve	
16.	Click the **Close** button. Close	
17.	You have completed the final approval of the employee's annual performance evaluation. Click the **Home** link. Home	
18.	Click the **Sign out** link. Sign out	
19.	You have completed the steps for approving the APA document by final manager. **End of Procedure.**	

Review and Print Approved APA Document

Employees will have access to their historical performance documents and have the ability to save or print as PDF.


Annual Performance Appraisal
Manager Evaluation - Completed

DEBORAH WHITAKER

Job Title: Judiciary Clerk II
Document Type: Annual Performance Appraisal
Template: Annual Performance Appraisal
Status: Completed

Manager: CONNIE GREEN
Period: 02/01/2015 - 10/01/2015
Document ID: 952
Due Date: 09/29/2015

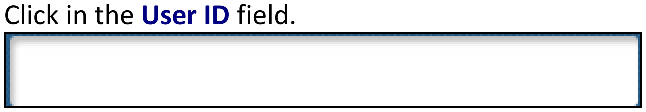
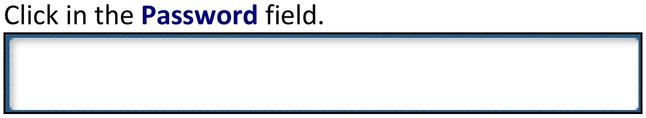
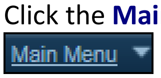
Employee Data

Empl ID :	000000842	
Department :	1001000	
Location Code :	C01-CTHSE	
Salary Plan/Grade :	SHS	J06
Salary Step :	1	
Years of Service :	26 Years 0 Months	
Years of Job :	26 Years 0 Months	

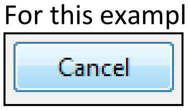
The document status is Completed.

Procedure

In this topic you will go through the steps to review a completed APA document and use the print function.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**connie.green**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Performance Management** menu. 	

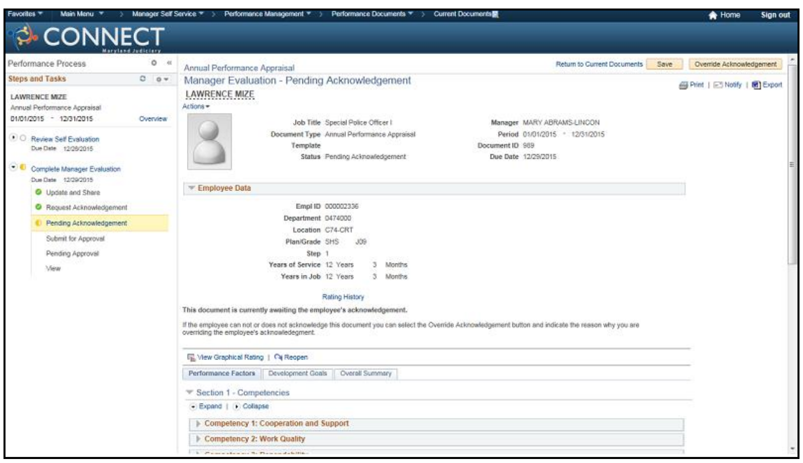
Step	Action	Notes
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Historical Documents** menu. Historical Documents	
11.	Click the **Expand Filter Criteria** button.	
12.	Click in the **Last Name** field.	
13.	Enter "**whitaker**" into the **Last Name** field.	
14.	Click the **Filter** button. Filter	
15.	Notice the Performance Documents section only displays names containing "Whitaker".	
16.	Click in the **Period Between** field.	
17.	Enter "**02/01/2015**" into the **Period Between** field.	
18.	Click in the **Period Between** field.	
19.	Enter "**10/01/2015**" into the **Period Between** field.	
20.	Click the **Filter** button. Filter	
21.	Click the **DEBORAH WHITAKER** link for the desired appraisal document. DEBORAH WHITAKER	
22.	Notice the status of the document are checked with a green circle indicating completed. You may review the document by expanding the sections.	
23.	Click the **Print** link to save or print a copy of the performance document. Print	

Step	Action	Notes
24.	The document opens in a new window as a PDF. Mouse over the bottom to view the navigation menu which contains: - save button - print button - page up/down arrows - zoom +/- buttons Click the **Down Arrow** to view the next page. 	
25.	Click the - button to zoom out. 	
26.	Click the - button to zoom out. 	
27.	Click the - button to zoom out. 	
28.	Click the **Down Arrow** to view the next page. 	
29.	Click the **Down Arrow** to view the next page. 	
30.	Click the **Down Arrow** to view the next page. 	
31.	Click the **Down Arrow** to view the next page. 	
32.	Click the **Print Button** to print the document. 	
33.	The Print dialogue box for your printer will display and you will be able to make the adjustments necessary to print your document. For this example, click the **Cancel** button. 	

Step	Action	Notes
34.	Click the **Close (X)** button.	
35.	You have completed reviewing and printing the performance document. Click the **Home** link. Home	
36.	Click the **Sign out** link. Sign out	
37.	You have completed reviewing an approved APA document and using the print function. **End of Procedure.**	

Overriding APA Acknowledgement

Overriding Annual Performance Appraisal Acknowledgement



Procedure

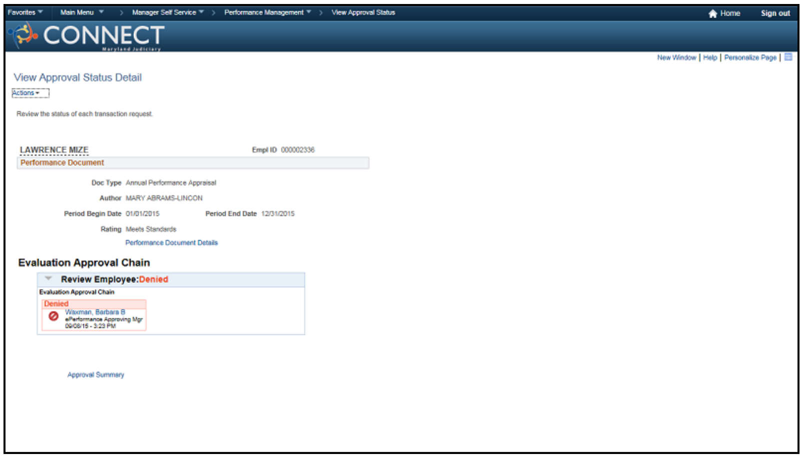
In this topic you will go through the steps to override an APA acknowledgement.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**mary.abrams**" into the **User ID** field.	

Step	Action	Notes
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **LAWRENCE MIZE** link. LAWRENCE MIZE	
12.	The Override Acknowledgement button is used if the employee is not available or refuses to provide acknowledgement to the evaluation and the manager needs to bypass this step.	
13.	Click the **Override Acknowledgement** button. Override Acknowledgement	
14.	Click the **Employee Not Available** option.	
15.	Click the **Confirm** button. Confirm	
16.	Click the **Home** link. Home	
17.	Click the **Sign out** link. Sign out	
18.	You have completed the steps to override an APA acknowledgment. **End of Procedure.**	

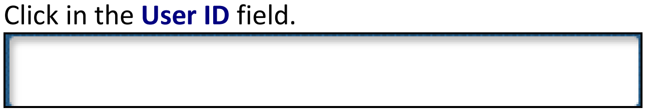
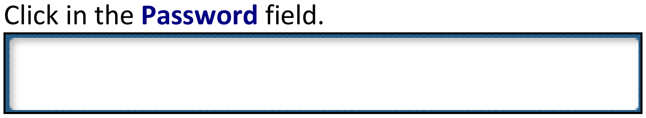
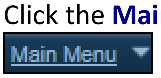
Reviewing Denied APA Documents

Reviewing Denied Annual Performance Appraisal Documents



Procedure

In this topic you will go through the steps to review a denied APA document.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Performance Management** menu. 	
9.	Click the **View Approval Status** menu. 	

Step	Action	Notes
10.	Click the **Approval Status** drop-down list.	
11.	Click the **Denied** list item. Denied	
12.	Click the **Search** button. Search	
13.	Click the **LAWRENCE MIZE** link. LAWRENCE MIZE	
14.	Notice Denied is displayed in the Approval Chain.	
15.	Click the **Performance Document Details** link. Performance Document Details	
16.	Click the **Vertical** scrollbar and scroll down the page to view the performance document details.	
17.	Click the **Return to Performance Document Approval** link. Return to Performance Document Approval	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the steps to review a denied APA document. **End of Procedure.**	

Performance Improvement Plan (PIP)

Managers create Performance Improvement Plan documents for employees and then evaluate the employees based on their performance. The managers then review the document with the employee and the employee acknowledges their performance appraisal. The final approval for the performance document is given by the supervisor's manager. This action completes the Performance Improvement Plan document.

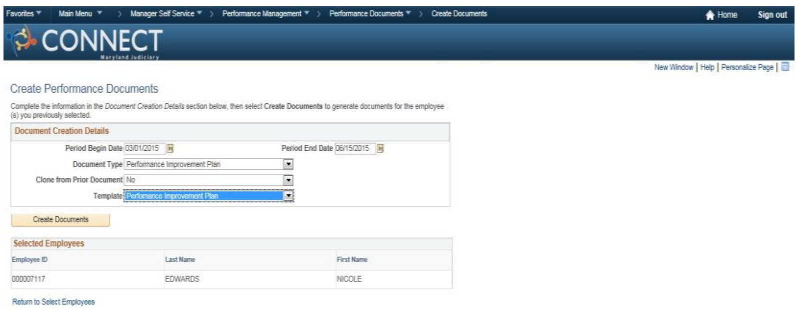
During this module you will review topics on:

- Creating a Performance Improvement Plan Document (PIP)
- Reviewing and Update PIP Documents
- Reviewing PIP Document Checkpoint 1 with Employee
- Finalizing the Criteria of the PIP Document
- Evaluating PIP Documents
- Requesting Acknowledgement of PIP Document
- Reviewing and Submitting PIP Document for Approval

- Reviewing Completed PIP Document
- Viewing PIP Document Approval Status Summary

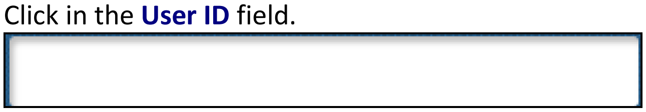
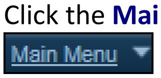
Creating a Performance Improvement Plan Document (PIP)

Managers will have the ability to create performance improvement plan documents for their team members.



Procedure

In this topic you will go through the steps of creating a Performance Improvement Plan (PIP) document.

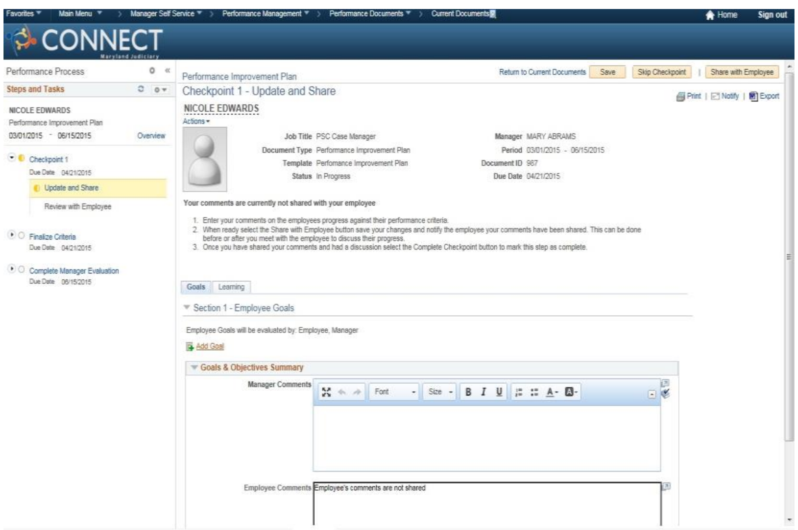
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	

Step	Action	Notes
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Create Documents** menu. Create Documents	
11.	Click in the **As Of Date** field. 09/08/2015	
12.	Press **[Backspace]**.	
13.	Enter "**07/15/2015**" into the **As Of Date** field.	
14.	Click the **Refresh Employees** button. Refresh Employees	
15.	Click the **Vertical** scrollbar to navigate down the page.	
16.	Click the check box for **NICOLE EDWARDS**.	
17.	Click the **Continue** button. Continue	
18.	Click in the **Period Begin Date** field.	
19.	Enter "**03/01/2015**" into the **Period Begin Date** field.	
20.	Click in the **Period End Date** field.	
21.	Enter "**06/15/2015**" into the **Period End Date** field.	
22.	Click the **Document Type** drop-down list.	
23.	Click the **Performance Improvement Plan** list item. Performance Improvement Plan	
24.	Click the **Template** drop-down list.	
25.	Click the **Performance Improvement Plan** list item. Perfomance Improvement Plan	
26.	Click the **Create Documents** button. Create Documents	
27.	This is the Results page. Verify that the document was created successfully by viewing the **Status** column.	

Step	Action	Notes
28.	Click the **Home** link. 	
29.	Click the **Sign out** link. 	
30.	You have completed the steps to creating a Performance Improvement Plan (PIP) document. **End of Procedure.**	

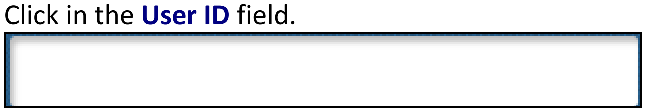
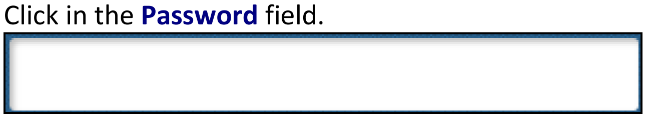
Reviewing and Update PIP Documents

Managers will have the ability to review and add development goals to performance improvement plan documents that they have created.



Procedure

In this topic you will go through the steps to review and update a PIP document with a development goal.

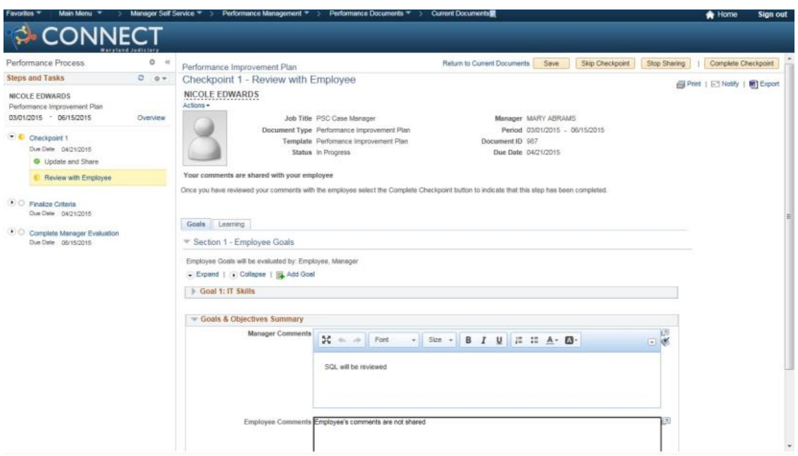
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	

Step	Action	Notes
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	The Current Performance Documents page lists all the performance documents for employees for which you are manager. The page lists the employee, the status of the document, and the dates associated with the document.	
12.	Click the **NICOLE EDWARDS** link. NICOLE EDWARDS	
13.	Click the **Add Goal** link. Add Goal	
14.	Click in the **Title** field.	
15.	Enter "**IT Skills**" into the **Title** field.	
16.	Click in the **Description** field.	
17.	Enter "**Develop SQL skills**" into the **Description** field.	
18.	Click the **Add** button. Add	
19.	Click the **Vertical** scrollbar to navigate down the page.	
20.	Click in the **Manager Comments** field.	
21.	Enter "**SQL will be reviewed**" into the **Manager Comments** field.	
22.	Click the **Vertical** scrollbar to navigate down the page.	
23.	Click in the **Manager Comments** field.	
24.	Enter "**SQL will be reviewed**" into the **SQL** field.	
25.	Click the **Share with Employee** button. Share with Employee	

Step	Action	Notes
26.	Click the **Confirm** button. Confirm	
27.	Notice the green check mark that indicates the comments were shared successfully with the employee.	
28.	Click the **Home** link. Home	
29.	Click the **Sign out** link. Sign out	
30.	You have completed the steps to review and update a PIP document with a development goal. **End of Procedure.**	

Reviewing PIP Document Checkpoint 1 with Employee

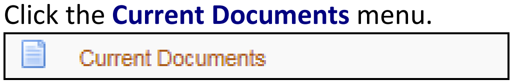
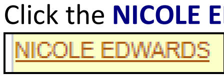
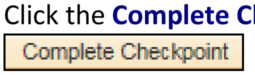
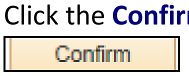
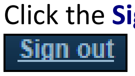
Managers must review the comments they added in the PIP document with the employee and use the Complete Chackpoint button to verify.



Procedure

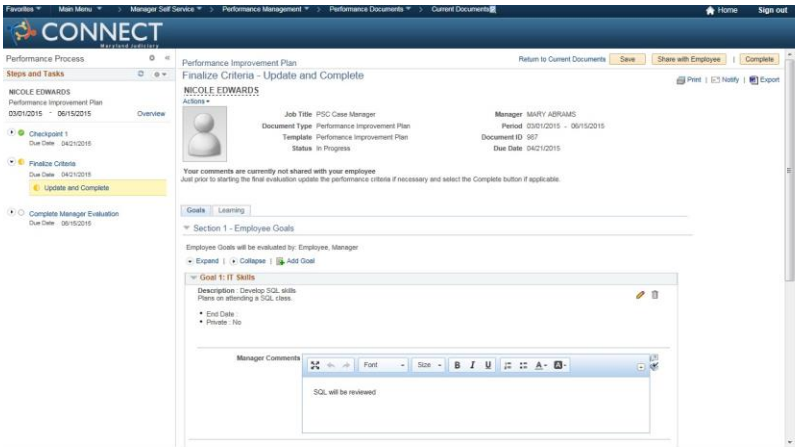
In this topic you will go through the steps of verifying that you have reviewed the manager comments with the employee.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**mary.abrams**" into the **User ID** field.	

Step	Action	Notes
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Performance Management** menu. 	
9.	Click the **Performance Documents** menu. 	
10.	Click the **Current Documents** menu. 	
11.	Click the **NICOLE EDWARDS** link. 	
12.	The **Complete Checkpoint** button is used to indicate the manager has reviewed the comments they entered into the PIP with the employee.	
13.	Click the **Complete Checkpoint** button. 	
14.	Click the **Confirm** button. 	
15.	Click the **Home** link. 	
16.	Click the **Sign out** link. 	
17.	You have completed the steps for verifying that you have reviewed the manager comments with the employee. **End of Procedure.**	

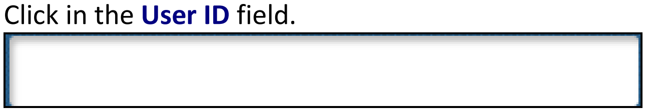
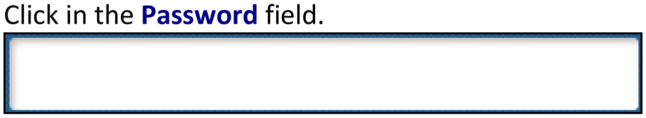
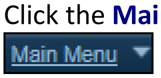
Finalizing the Criteria of the PIP Document

Managers finalize the criteria of the PIP document and add any updates to the improvement plan. Then the document is labeled as complete.



Procedure

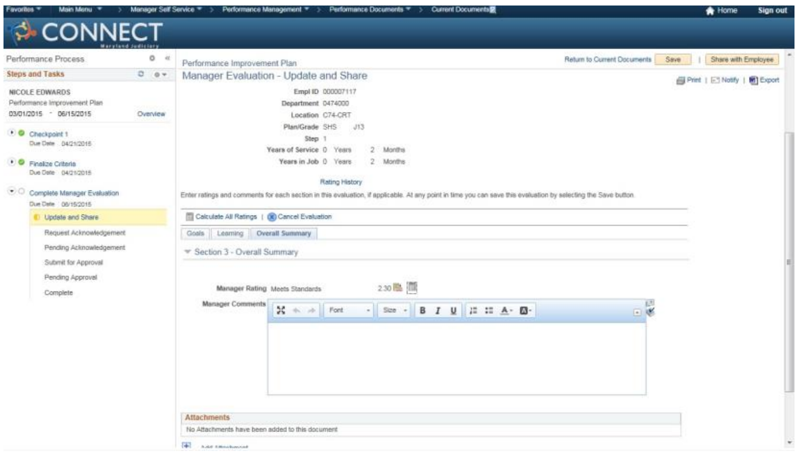
In this topic you will go through the steps of finalizing the criteria and adding an update to an employee's PIP document.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Performance Management** menu. 	

Step	Action	Notes
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **NICOLE EDWARDS** link. NICOLE EDWARDS	
12.	Click the **Expand** link. Expand	
13.	Click the **Vertical** scrollbar to navigate down the page.	
14.	Click the **Edit Details** button.	
15.	The **Edit Goal** page is used to add any updates to the PIP document. In this example the manager adds that the employee will attend a class to improve their skill.	
16.	Click in the **Description** field.	
17.	Enter "**Plans on attending a SQL class.**" into the **Description** field.	
18.	Click the **Update** button. Update	
19.	Click the **Complete** button. Complete	
20.	Click the **Confirm** button. Confirm	
21.	Notice the green check mark indicating the criteria has been finalized.	
22.	Click the **Home** link. Home	
23.	Click the **Sign out** link. Sign out	
24.	You have completed the steps of finalizing the criteria and adding an update to an employee's PIP document. **End of Procedure.**	

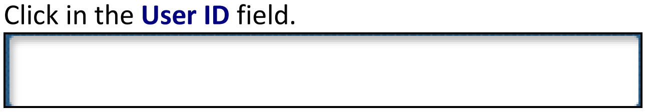
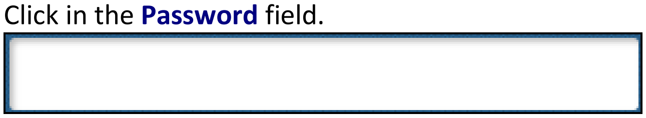
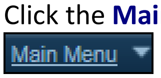
Evaluating PIP Documents

Managers must evaluate the employee's progress on their PIP document. This is done using a rating system and an overall numerical rating.



Procedure

In this topic you will go through the steps to rate an employee's progress on their PIP document.

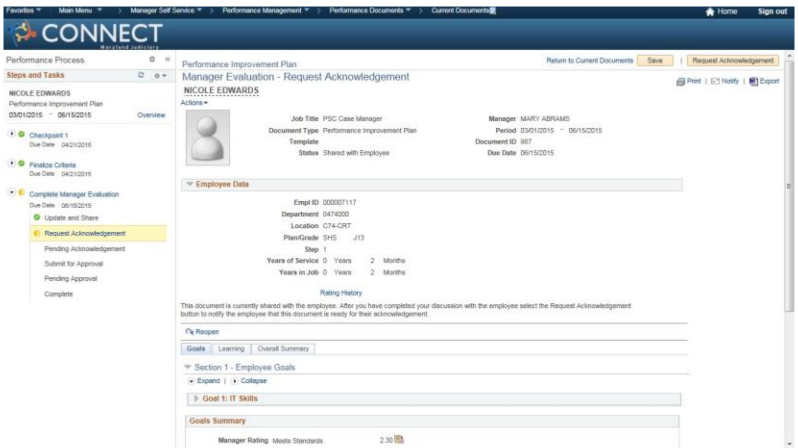
Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Performance Management** menu. 	

Step	Action	Notes
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **NICOLE EDWARDS** link. NICOLE EDWARDS	
12.	Use the Expand link to view all the goals and their descriptions.	
13.	Click the **Expand** link. Expand	
14.	Click the **Vertical** scrollbar to navigate down the page.	
15.	Click the **Manager Rating** drop-down list.	
16.	Click the **Meets Standards** list item. Meets Standards	
17.	Click the **Calculate Rating** button.	
18.	Click the **Vertical** scrollbar to navigate up the page.	
19.	Click the **Learning** tab. Learning	
20.	Click the **Manager Rating** drop-down list.	
21.	Click the **Meets Standards** list item. Meets Standards	
22.	Click the **Overall Summary** tab. Overall Summary	
23.	Click the **Calculate Rating** button.	
24.	Click the **Share with Employee** button. Share with Employee	
25.	Click the **Confirm** button. Confirm	
26.	Notice the green check mark indicating the evaluation was shared with the employee.	
27.	Click the **Home** link. Home	

Step	Action	Notes
28.	Click the **Sign out** link. 	
29.	You have completed the steps to rate an employee's progress on their PIP document. **End of Procedure.**	

Requesting Acknowledgement of PIP Document

Managers request acknowledgement of the PIP document from their employee after the PIP document has been discussed and reviewed with the employee.



Procedure

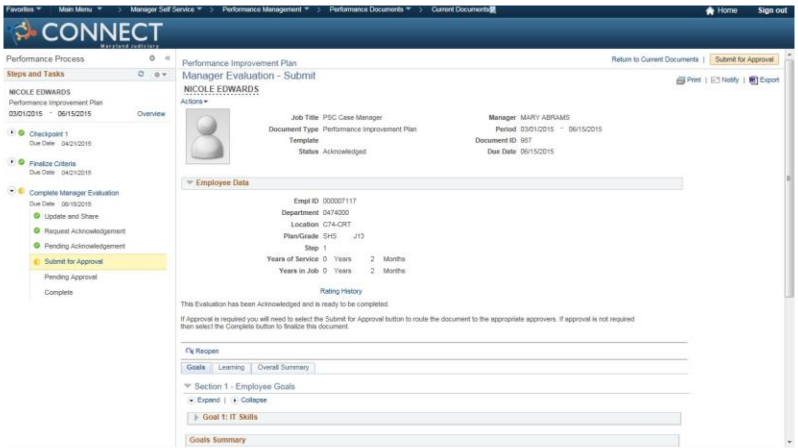
In this topic you will go through the steps to request an employee to acknowledge the evaluation of their PIP document.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	

Step	Action	Notes
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **NICOLE EDWARDS** link. NICOLE EDWARDS	
12.	The **Request Acknowledgement** button is used after you have completed the discussion about the PIP document with your employee and are ready for them to acknowledge it.	
13.	Click the **Request Acknowledgement** button. Request Acknowledgement	
14.	Click the **Confirm** button. Confirm	
15.	Notice the green check mark indicating that the acknowledgement request was successfully sent to the employee.	
16.	Click the **Home** link. Home	
17.	Click the **Sign out** link. Sign out	
18.	You have completed the steps to request an employee to acknowledge the evaluation of their PIP document. **End of Procedure.**	

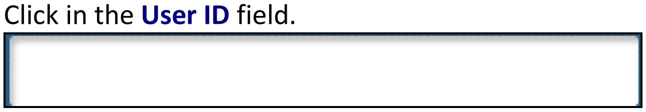
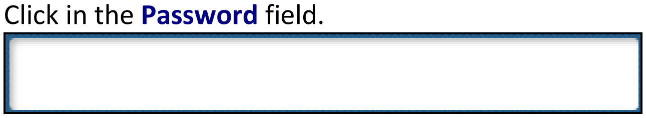
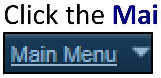
Reviewing and Submitting PIP Document for Approval

Managers are required to submit the PIP documents to their supervisor for final approval before the PIP document status is changed to complete.



Procedure

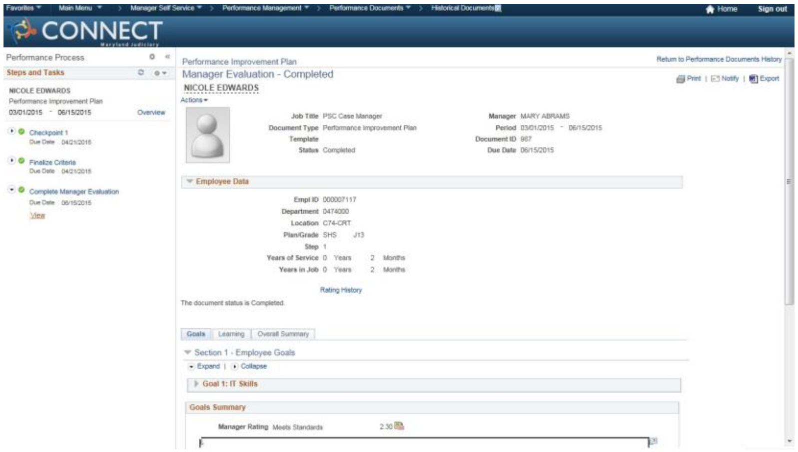
In this topic you will go through the steps to submit a PIP document for approval to the final approver.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button.  	
6.	Click the **Main Menu** button.  	
7.	Click the **Manager Self Service** menu.  	
8.	Click the **Performance Management** menu.  	

Step	Action	Notes
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Current Documents** menu. Current Documents	
11.	Click the **NICOLE EDWARDS** link. NICOLE EDWARDS	
12.	The **Submit for Approval** button is used after the PIP document has been reviewed and is ready for submission to your supervisor. This is the final approval and completes the PIP document.	
13.	Click the **Submit for Approval** button. Submit for Approval	
14.	Click the **Confirm** button. Confirm	
15.	Notice the green check mark indicating you have successfully submitted the document for approval.	
16.	Click the **Home** link. Home	
17.	Click the **Sign out** link. Sign out	
18.	You have completed the steps to submit a PIP document for approval to the final approver. **End of Procedure.**	

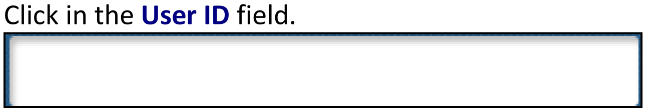
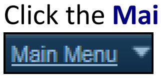
Reviewing Completed PIP Document

Managers have the ability to view completed PIP documents by using the Historical Documents page.



Procedure

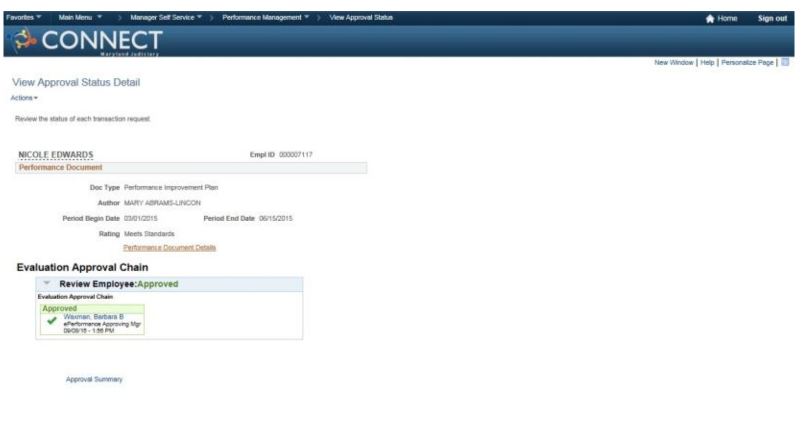
In this topic you will go through the steps to review a completed PIP document.

Step	Action	Notes
1.	Click in the **User ID** field. 	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field. 	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Performance Management** menu. 	

Step	Action	Notes
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Historical Documents** menu. Historical Documents	
11.	Click the **NICOLE EDWARDS** link. NICOLE EDWARDS	
12.	Notice the document status is "Completed".	
13.	Click the **Home** link. Home	
14.	Click the **Sign out** link. Sign out	
15.	You have completed the steps to review a completed PIP document. **End of Procedure.**	

Viewing PIP Document Approval Status Summary

Managers have the ability to view the approval status summary of their employees' PIP documents and the document details after the document has been submitted.



Procedure

In this topic you will go through the steps to view the approval status summary of an employee's PIP document.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**mary.abrams**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **View Approval Status** menu. View Approval Status	
10.	Click in the **Last Name** field.	
11.	Enter "**EDWARDS**" into the **Last Name** field.	
12.	Click the **Search** button. Search	
13.	Click the **NICOLE EDWARDS** link. NICOLE EDWARDS	
14.	The **View Approval Status** page is used to view the Evaluation Approval Chain and the Performance Document Details. In this example you can view the PIP has been approved.	
15.	Click the **Performance Document Details** link. Performance Document Details	
16.	Click the **Vertical** scrollbar and scroll down the page to view the performance document details.	
17.	Click the **Return to Performance Document Approval** link. Return to Performance Document Approval	

Step	Action	Notes
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the steps to view the approval status summary of an employee's PIP document. **End of Procedure.**	

Managing Performance Documents

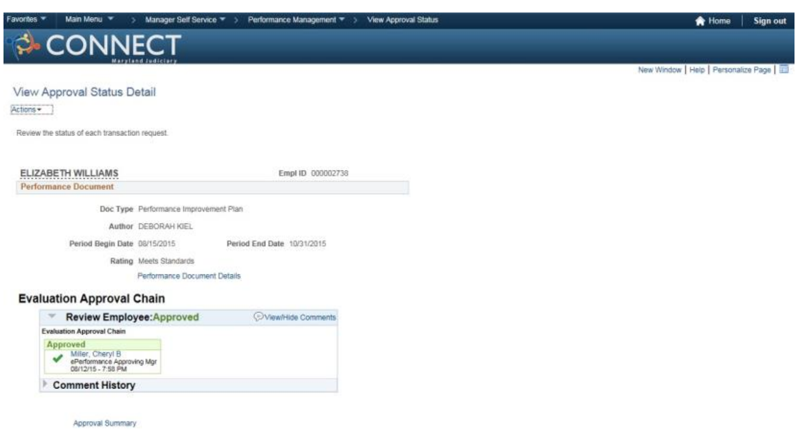
Managing Performance Documents

During this module you will review topics on:

- Viewing Performance Document Approval Status Summary
- Viewing Dashboard Alerts
- Managing Employee Performance Notes
- Creating Performance Documents by Groups
- Viewing Historical Performance Documents
- Transferring Performance Documents
- Reopening Performance Documents
- Canceling Performance Documents
- Deleting Performance Documents

Viewing Performance Document Approval Status Summary

Managers have the ability to view performance documents approval status summary.



Procedure

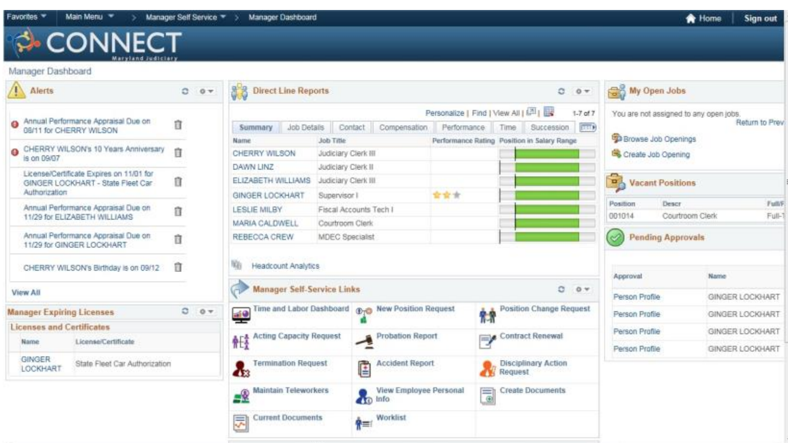
In this topic you will go through the steps to view the approval status summary of an employee's PIP document.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.kiel**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **View Approval Status** menu. View Approval Status	
10.	Click in the **Last Name** field.	
11.	Enter "**williams**" into the **Last Name** field.	
12.	Click the **Approval Status** drop-down list.	
13.	Click the **Approved** list item. Approved	
14.	Click the **Search** button. Search	
15.	Click the **ELIZABETH WILLIAMS** link. ELIZABETH WILLIAMS	

Step	Action	Notes
16.	The **View Approval Status** page is used to view the Evaluation Approval Chain and the Performance Document Details. In this example you can view the PIP has been approved.	
17.	Click the **Approval Summary** link. Approval Summary	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the steps to view the approval status summary of an employee's PIP document. **End of Procedure.**	

Viewing Dashboard Alerts

Managers have the ability to use the manager dashboard to view alerts about performance documents that are due for specific employees.



Procedure

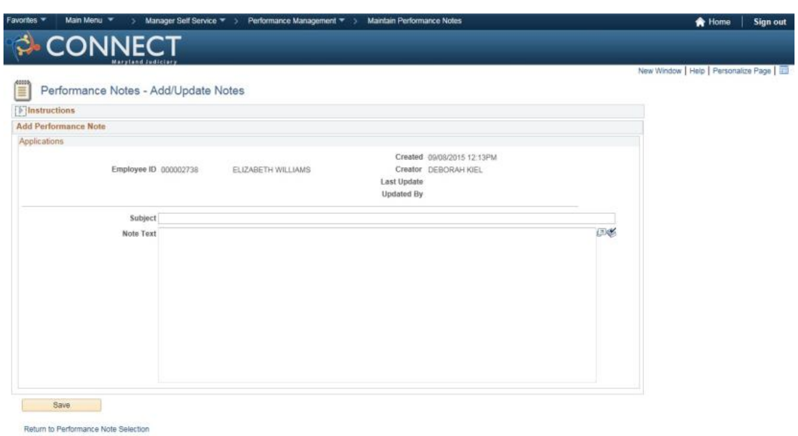
In this topic you will go through the steps to viewing manager dashboard performance alerts.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.kiel**" into the **User ID** field.	
3.	Click in the **Password** field.	

Step	Action	Notes
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Dashboard** menu. Manager Dashboard	
8.	Notice the **Alerts** pagelet. This contains alerts for various performance documents indicating when the documents are due and which employees the documents need to be completed for.	
9.	Click the **Home** link. Home	
10.	Click the **Sign out** link. Sign out	
11.	You have completed the steps to viewing manager dashboard performance alerts. **End of Procedure.**	

Managing Employee Performance Notes

Managers have the ability to record notes about specific employees using the performance notes section.



Procedure

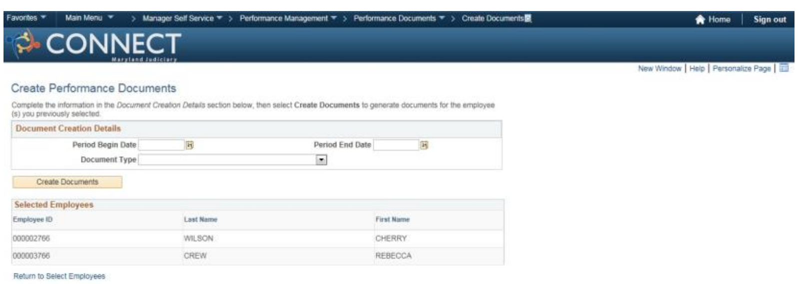
In this topic you will go through the steps to adding and reviewing performance notes to an employee's performance notes page.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.kiel**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Maintain Performance Notes** menu. Maintain Performance Notes	
10.	Click in the **Employee ID** field.	
11.	Enter "**000002738**" into the **Employee ID** field.	
12.	Click the **Add a New Note** button. Add a New Note	
13.	Managers can use the **Maintain Performance Notes** page to record specific notes about their employees to use when performance evaluations are completed. Employees are unable to retrieve notes that their manager has entered about them; and managers are unable to retrieve notes that their employees have entered about them.	
14.	Click in the **Subject** field.	
15.	Enter "**Overtime**" into the **Subject** field.	
16.	Click in the **Note Text** field.	
17.	Enter the desired notes. For the purposes of this training topic, the notes have been entered for you.	

Step	Action	Notes
18.	Click the **Save** button. Save	
19.	Click the **Return to Performance Note Selection** link. Return to Performance Note Selection	
20.	Click the **Excel** link to view additional notes for Elizabeth. Excel	
21.	Click the **Return to Performance Note Selection** link. Return to Performance Note Selection	
22.	Click the **Home** link. Home	
23.	Click the **Sign out** link. Sign out	
24.	You have completed the steps to adding and reviewing performance notes to an employee's performance notes page. **End of Procedure.**	

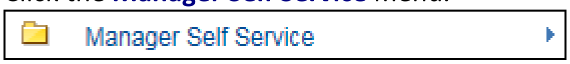
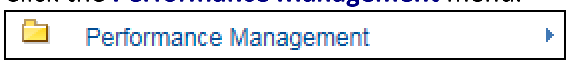
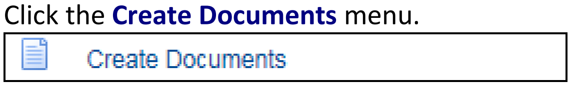
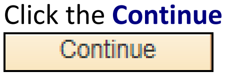
Creating Performance Documents by Groups

Managers have the ability to create performance documents for multiple employees simultaneously.



Procedure

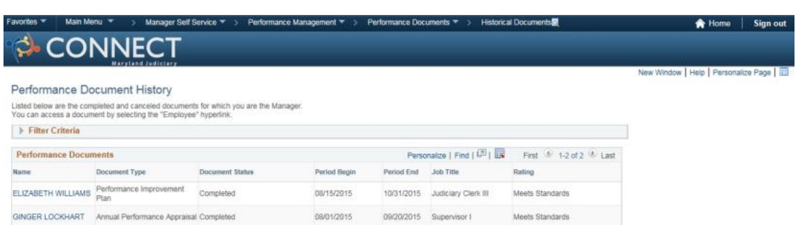
In this topic you will go through the steps to create performance documents for multiple employees simultaneously.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.kiel**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. 	
6.	Click the **Main Menu** button. 	
7.	Click the **Manager Self Service** menu. 	
8.	Click the **Performance Management** menu. 	
9.	Click the **Performance Documents** menu. 	
10.	Click the **Create Documents** menu. 	
11.	The **Create Documents** page lists the employees for which you are manager. You use this page to select the employees you want to create performance documents for.	
12.	Click the **Select** checkbox for Cherry Wilson.	
13.	Click the **Select** checkbox for Rebecca Crew.	
14.	Click the **Continue** button. 	
15.	Click in the **Period Begin Date** field.	
16.	Enter "**01/01/2015**" into the **Period Begin Date** field.	
17.	Click in the **Period End Date** field.	
18.	Enter "**12/31/2015**" into the **Period End Date** field.	
19.	Click the **Document Type** drop-down list.	

Step	Action	Notes
20.	Click the **Annual Performance Appraisal** list item. Annual Performance Appraisal	
21.	Click the **Template** drop-down list.	
22.	Click the **Annual Perform Appraisal- Empl** list item. Annual Perform Appraisal- Empl	
23.	Click the **Create Documents** button. Create Documents	
24.	Notice the performance document was created for Cherry but not Rebecca. A document had already been created for Rebecca so a duplicate was not generated.	
25.	Click the **Current Documents** link. Current Documents	
26.	Notice the document that was successfully created can now be seen listed on the **Current Documents** page.	
27.	Click the **Home** link. Home	
28.	Click the **Sign out** link. Sign out	
29.	You have completed the steps to create performance documents for a group of employees. **End of Procedure.**	

Viewing Historical Performance Documents

Managers have the ability to view all the completed and canceled performance documents for which they are manager.



Procedure

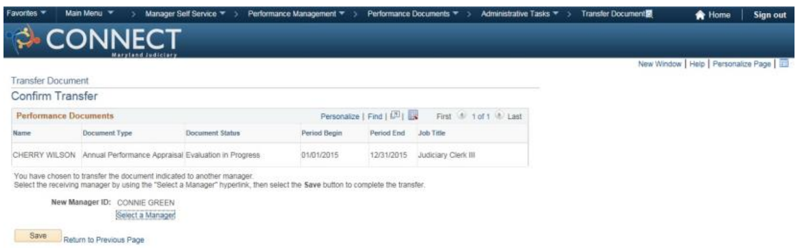
In this topic you will go through the steps to view performance documents that have been completed.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.kiel**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Historical Documents** menu. Historical Documents	
11.	The **Historical Documents** page lists all the completed and canceled documents for your employees.	
12.	Click the **GINGER LOCKHART** link. GINGER LOCKHART	
13.	Click the **Expand** link. Expand	
14.	Click the **Vertical** scrollbar to navigate down the page.	
15.	View the Manager Ratings.	
16.	Click the **Vertical** scrollbar to navigate down the page.	
17.	View the remaining Manager Ratings.	
18.	Click the **Return to Performance Documents History** link. Return to Performance Documents History	
19.	Click the **Home** link. Home	

Step	Action	Notes
20.	Click the **Sign out** link. Sign out	
21.	You have completed the steps to view performance documents that have been completed. **End of Procedure.**	

Transferring Performance Documents

Managers have the ability to transfer performance documents for employees to a new manager for completion.



Procedure

In this topic you will go through the steps to transfer a performance document to another manager.

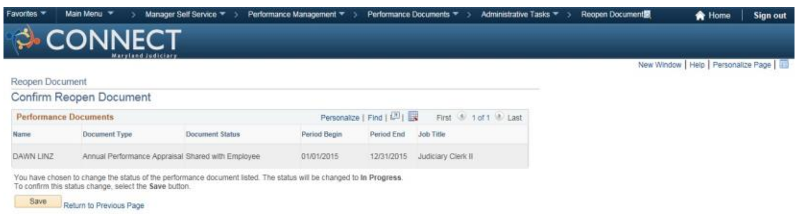
Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.kiel**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	

Step	Action	Notes
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Administrative Tasks** menu. Administrative Tasks	
11.	Click the **Transfer Document** menu. Transfer Document	
12.	The **Transfer Document** page is used to select the employee and performance document you want to transfer.	
13.	Click the checkbox for **Cherry Wilson** Annual Performance Appraisal 01/01/2015.	
14.	Click the **Vertical** scrollbar to navigate down the page.	
15.	Click the **Continue** button. Continue	
16.	Click the **Select a Manager** link. Select a Manager	
17.	Click in the **Name** field.	
18.	Enter "**connie**" into the **Name** field.	
19.	Click in the **Last Name** field.	
20.	Enter "**green**" into the **Last Name** field.	
21.	Click the **Search** button. Search	
22.	Click the **CONNIE GREEN** option.	
23.	Click the **OK** button. OK	
24.	Clicking the **Save** button completes the transfer to the new manager you have selected.	
25.	Click the **Save** button. Save	
26.	Click the **OK** button. OK	

Step	Action	Notes
27.	Click the **Home** link. Home	
28.	Click the **Sign out** link. Sign out	
29.	You have completed the steps to transfer a performance document to another manager. **End of Procedure.**	

Reopening Performance Documents

Managers have the ability to reopen performance documents for employees to change the status to In Progress.



Procedure

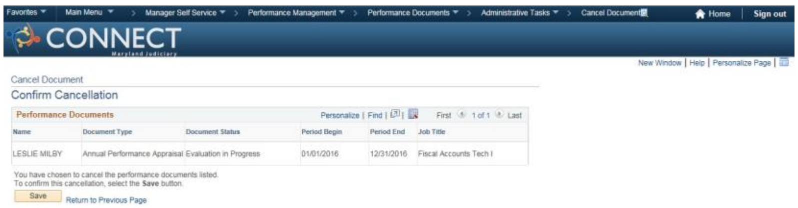
In this topic you will go through the steps to reopen a performance document for an employee.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.kiel**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	

Step	Action	Notes
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Administrative Tasks** menu. Administrative Tasks	
11.	Click the **Reopen Document** menu. Reopen Document	
12.	Reopening an employee's performance document changes the status of the document back to "Evaluation". Only a document in the status of Share with Employee, Awaiting Acknowledgement, Acknowledged, or Approval can be reopened.	
13.	Click the checkbox for **Dawn Linz** Annual Performance Appraisal 01/01/2015.	
14.	Click the **Continue** button. Continue	
15.	Clicking the **Save** button will change the document status.	
16.	Click the **Save** button. Save	
17.	Click the **OK** button. OK	
18.	Click the **Home** link. Home	
19.	Click the **Sign out** link. Sign out	
20.	You have completed the steps to reopen a performance document for an employee. **End of Procedure.**	

Canceling Performance Documents

Managers have the ability to cancel performance documents that have the evaluation in progress status.



Procedure

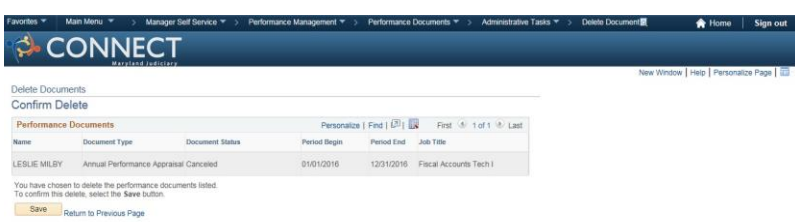
In this topic you will go through the steps to cancel a performance document.

Step	Action	Notes
1.	Click in the **User ID** field.	
2.	Enter "**deborah.kiel**" into the **User ID** field.	
3.	Click in the **Password** field.	
4.	Enter "**welcome1**" into the **Password** field.	
5.	Click the **Sign In** button. Sign In	
6.	Click the **Main Menu** button. Main Menu	
7.	Click the **Manager Self Service** menu. Manager Self Service	
8.	Click the **Performance Management** menu. Performance Management	
9.	Click the **Performance Documents** menu. Performance Documents	
10.	Click the **Administrative Tasks** menu. Administrative Tasks	
11.	Click the **Cancel Document** menu. Cancel Document	

Step	Action	Notes
12.	Use this page to select the employee and performance document you want to cancel. Only documents in the status of Define Criteria, Track Progress, or Evaluation in Progress can be canceled.	
13.	Click the checkbox for **Leslie Milby** Annual Performance Appraisal 01/01/2016.	
14.	Click the **Vertical** scrollbar to navigate down the page.	
15.	Click the **Continue** button. Continue	
16.	Clicking the **Save** button confirms the cancellation of the selected document.	
17.	Click the **Save** button. Save	
18.	Click the **OK** button. OK	
19.	Click the **Home** link. Home	
20.	Click the **Sign out** link. Sign out	
21.	You have completed the steps to cancel a performance document. **End of Procedure.**	

Deleting Performance Documents

Managers have the ability to delete an employee's performance document when it is in the status of canceled.



Procedure

In this topic you will go through the steps to delete an employee's performance document.

Step	Action	Notes
1.	Enter "**deborah.kiel**" into the **User ID** field.	
2.	Click in the **Password** field.	
3.	Enter "**welcome1**" into the **Password** field.	
4.	Click the **Sign In** button. Sign In	
5.	Click the **Main Menu** button. Main Menu	
6.	Click the **Manager Self Service** menu. Manager Self Service	
7.	Click the **Performance Management** menu. Performance Management	
8.	Click the **Performance Documents** menu. Performance Documents	
9.	Click the **Administrative Tasks** menu. Administrative Tasks	
10.	Click the **Delete Document** menu. Delete Document	
11.	Use this page to select the employee and performance document you want to delete. Only documents in the Canceled status can be deleted.	
12.	Click the checkbox for **Leslie Milby** Annual Performance Appraisal 01/01/2016.	
13.	Click the **Continue** button. Continue	
14.	Clicking the **Save** button confirms deletion of the selected performance document.	
15.	Click the **Save** button. Save	
16.	Click the **OK** button. OK	

Step	Action	Notes
17.	Click the **Home** link. Home	
18.	Click the **Sign out** link. Sign out	
19.	You have completed the steps to delete an employee's performance document. **End of Procedure.**	

GLOSSARY

activity	In the CONNECT Education and Learning system, **activity** is an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and wait listing capacities.
check box	A **check box** is a small square box that turns an option on or off.
effective date	A method of dating information in CONNECT. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
Look Up	A **Lookup** button, which looks like a magnifying glass, can be used to look up a valid value for the field
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
planned learning	The plan learning is a self-service repository for all of a learner's planned learning activities and programs.
run control ID	A unique ID to associate each user with his or her own run control table entries.
search	**Search** is composed of basic and advance search. Both allow you to look up data based on information provided such as Employee ID or Name, or selecting options from drop-down list boxes.
Sign in	To **Sign in** or **Log in** indicates when the site opens, you type in your **User ID** and **Password** to access the secured areas.
workflow	**Workflow** enables automated notification and easier management of tasks, or worklist items.
worklist	The automated to-do list that CONNECT Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.