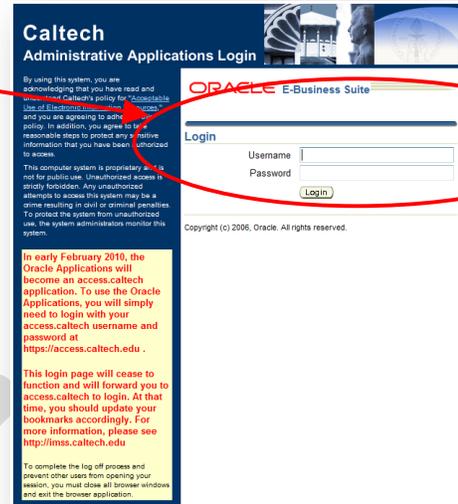


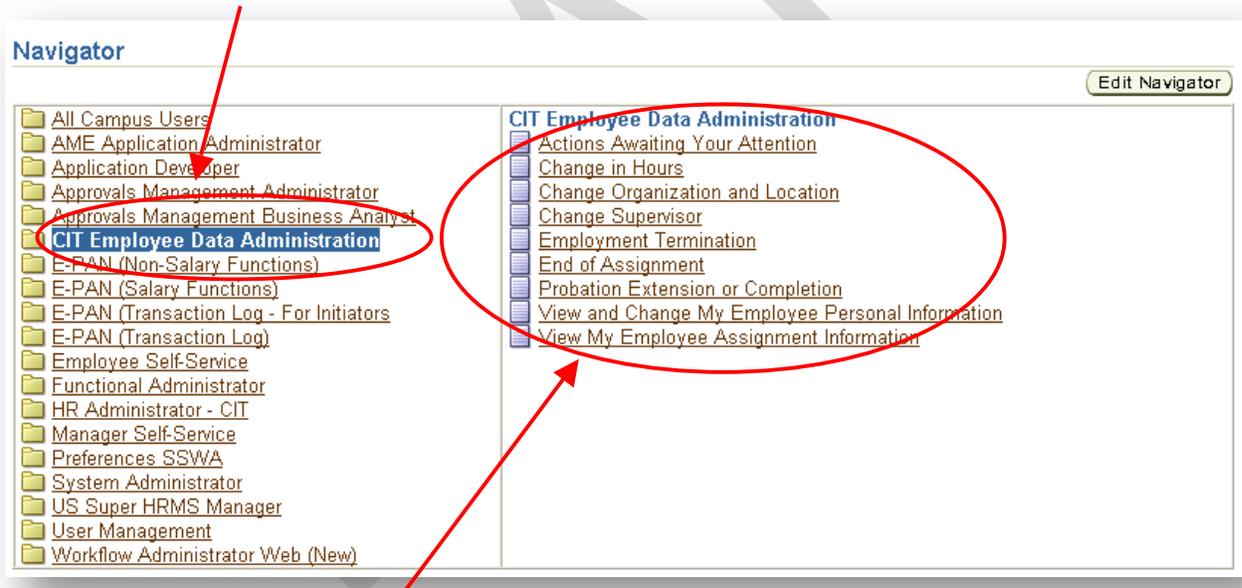


1. Log In to CIT Employee Data Administration

a) Log in to Oracle using the same Username/password that you use for EPAN and other Oracle responsibilities.



b) Select "CIT Employee Data Administration" Responsibility



c) Select the Desired Function



2. Select Your Employee

- a) There are 4 ways to search for an employee record: Supervisor Hierarchy Tree, Name Search, Advanced Search, and My List

The screenshot shows the Oracle CIT Manager Self Service interface. At the top, there are navigation links for Home, Logout, Preferences, and Help. Below the header, there is a search bar with a 'Go' button and two links: 'Advanced Search' and 'My List'. Below the search bar, there is a section titled 'Change Organization and Location: People in Hierarchy'. Below this section, there is a table with columns: Focus Name, Assignment Number, Job, Department, Action, and Details. The table contains five rows of employee data. Red arrows point to the 'Advanced Search' and 'My List' links, the search bar, and the 'Supervisor Hierarchy Tree' link.

Focus Name	Assignment Number	Job	Department	Action	Details
▼ Rice, Alan P					
Adams, Brian	1142492	Machining Services U. 1139 TECH...	Astronomy Administration		
▶ Benatar, Pat	1160289	Facilities Systems U. 1051 FACTR...	Facilities Management		
▶ Champagne, Nathan	1841307	Business Systems Consulting-IC U. 1033 IT...	Business Systems Analysis		
Lauer, Cindy	1160120	Financial Analysis-IC U. 1091 FIN...	Physics Administration		
Lewis, Huey C	1156259	Staff Support U. 1060 GENAD...	Biology Administration		

- **Supervisor Hierarchy Tree** – Those employees who report up to the manager logged in to Oracle are displayed in the Supervisor Hierarchy Tree when you first select a function.
- **Name Search** – Users can search by Employee Name for any employee who the user has access to (based upon security rules).
 - Name Search is based on the format: Last Name, First Name.



Caltch Employee Data Administration User Guide



- **Advanced Search** – The Advanced Search feature allows users to search for employees based on specific criteria such as Job, Department, or Payroll.
 - There is a drop list of additional fields that you may use to search for employees.
 - Once you have conducted an Advanced Search, you can save the search with the Save Search button
 - You can access Saved Searches through the Views button

ORACLE CIT Manager Self Service

Change Organization and Location: People in Hierarchy >
Change Organization and Location: People

Advanced Search
Specify parameters and values to filter the data that is displayed in your results set.

- Search results where each must contain all values entered.
- Search results where each may contain any value entered.

First Name is
Last Name is
Assignment Number is
Job is
Business Group is

Go Clear Add Another Business Group Add

Additional Fields

Views

Save Search

Select Name	Assignment Number	Job	Department	Action	Details
No search conducted.					

Return to People in Hierarchy



Caltech Employee Data Administration User Guide



- **My List** – The My List feature allows users to create a list of employees for easier access. My List is blank by default. Users must add Employee records to My List.

ORACLE CIT Manager Self Service

Home Logout Preferences Help

Name [Advanced Search](#)

[Change Organization and Location: People in Hierarchy](#) >

Change Organization and Location: People in My List

Select Person:

[Select All](#) | [Select None](#)

Select Name	Assignment Number	Job	Department	Action	Details
<input type="checkbox"/> Benatar, Pat	1160289	Facilities Systems U..1051.FACTR...	Facilities Management		
<input type="checkbox"/> Jovi, Bon	1481337	Staff Support U..1060.GENAD...	Research Administration Training		
<input type="checkbox"/> Oates, John	1483430	Skilled Trades U..1056.FACTR...	LIGO Caltech		

[Return to People in Hierarchy](#)

- To add Employees to My List:
 - i. Search for the employee using Name Search or Advanced Search
 - ii. Select the Employee or Employees to Add (tip: use the Select All button)
 - iii. Click “Add to My List” button

Select Person:

[Select All](#) | [Select None](#)

b) Click the **Action Icon** to begin processing the Data Change

ORACLE CIT Manager Self Service

Home Logout Preferences Help

Name [Advanced Search](#)

[Change Organization and Location: People in Hierarchy](#) >

Change Organization and Location: People in My List

Select Person:

[Select All](#) | [Select None](#)

Select Name	Assignment Number	Job	Department	Action	Details
<input type="checkbox"/> Benatar, Pat	1160289	Facilities Systems U..1051.FACTR...	Facilities Management		
<input type="checkbox"/> Jovi, Bon	1481337	Staff Support U..1060.GENAD...	Research Administration Training		
<input type="checkbox"/> Oates, John	1483430	Skilled Trades U..1056.FACTR...	LIGO Caltech		

[Return to People in Hierarchy](#)



3. Select the Effective Date for Data Change

- a) The Effect Date is the date when the change should take effect in Oracle. This date may be the current date, a future date, or a date in the past.
- b) Either type the date into the Effective Date field (use the date format indicated below the field) or Click on the desired Effective Date on the Calendar.

ORACLE CIT Manager Self Service

Home Logout Preferences Help

Information
Please enter an Effective Date on or after 19-Jul-2010.

Change Organization and Location: Effective Date Options [Back] [Continue]

Effective Date 25-Jul-2010

Employee Name Lewis, Huey C
Organization Biology Administration
Job Staff Support.U..1060.GENAD...
Assignment Number 1156259

Caltech UID 1156259
Supervisor Rice, Alan P

Enter the date on which the changes should take effect, and press the Continue button.

Changes should take effect on the effective date as entered below.
Effective Date 25-Jul-2010
(example: 25-Jul-2010)

July 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

[Back] [Continue]

Home | Logout | Preferences | Help

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- The Effective Date should almost always be the **First Day of a Payroll Period**.

- c) Click Continue to begin processing the Data Change.



4. Navigating Oracle Pages

ORACLE CIT Manager Self Service

Home Logout Preferences Help

Change Organization and Location: Assignment

Effective Date 25-Jul-2010

Employee Name Lewis, Huey C
Department Biology Administration
Job Staff Support.U.,1060.GENAD...
Assignment Category Fulltime-Regular
Assignment Number 1156259

Caltech UID 1156259
Supervisor Rice, Alan P
Grade U.43

* Indicates required field

Organization

* Organization Name Biology Administration

Address Line 1 California Institute of Technology
Address Line 2 Biology Division
Address Line 3 Altes Bldg 28 Rm 181
City Pasadena
State CA
Zip Code 91125
County Los Angeles
Country United States
[More Details...](#)

Change Reason

Change Reason Time Card Approver Change

Cancel Save For Later Back Next

Home Logout Preferences Help



- a) Always use the System Buttons to Navigate (not the Browser buttons)
- **Cancel** – Cancel the Data Change being processed and return to the People in Hierarchy Screen.
 - **Save for Later** – Save the Data Change being processed so the user can return to it at a later point. All data that has been entered will be saved.
 - **Back** – Return to the Previous Screen
 - **Next** – Save the data entered on this screen and proceed to the Next screen.
 - **Home** – Discard all Data entered and return to the list of Oracle responsibilities.



Caltech Employee Data Administration User Guide



b) Review Summary Data – The top of the screen display summary data regarding the selected employee, the effective date, and the type of data change being processed.

ORACLE CIT Manager Self Service

Home Logout Preferences Help

Change Organization and Location: Assignment

Effective Date 25-Jul-2010

Employee Name Lewis, Huey C
Department Biology Administration
Job Staff Support.U..1060.GENAD...
Assignment Category Fulltime-Regular
Assignment Number 1156259

Caltech UID 1156259
Supervisor Rice, Alan P
Grade U.43

* Indicates required field

Organization

Organization Name Biology Administration
Address Line 1 California Institute of Technology
Address Line 2 Biology Division
Address Line 3 Altes Bldg 28 Rm 181
City Pasadena
State CA
Zip Code 91125
County Los Angeles
Country United States
[More details...](#)

Change Reason

Change Reason Time Card Approver Change

Home Logout Preferences Help

Change Organization and Location: Assignment

Effective Date 25-Jul-2010

Employee Name Lewis, Huey C
Department Biology Administration
Job Staff Support.U..1060.GENAD...
Assignment Category Fulltime-Regular
Assignment Number 1156259



- c) Instructional Text and Tips – There are three different types of Instructional Text or Tips in Oracle: Page Instructions, Long Tips, and Short Tips
- **Page Instructions** are at the top of each Page or each Section within a Page. Please read these instructions carefully. They provide an overview on the type of data that should be entered on the page and links to resources to facilitate the data change process.
 - **Short Tips** are listed in blue under a specific field. The Short tip provides insight into the type of data that should be entered in the specific field or the format of how the data should be entered.

Assignment Status

Change Reason

Select a Change Reason for the Data Change being Submitted.

- **Long Tips** are indicated by an information bubble “” next to a specific field. Clicking on the information bubble will open a new window or tab (depending on your browser settings) with extensive detail on the specific field or the list of values for the specific field.

Assignment Status

Change Reason



5. Understanding Oracle Fields

a) Enterable Fields vs. Informational Fields



A screenshot of an Oracle form with the following fields:

* Organization Name	Biology Administration	
Address Line 1	California Institute of Technology	
Address Line 2	Biology Division	
Address Line 3	Alles Bldg 28 Rm 181	
City	Pasadena	

Red arrows point from the text below to the 'Organization Name' field and the 'Address Line 3' field.

- Enterable fields are surrounded by a light box
- Informational fields do not have a box and cannot be changed

b) Required Fields vs. Optional Fields

- A Required Field is marked with an asterisk. Data must be entered in this field in order to complete the screen and proceed to the next screen. However, if information already exists in this field, it does not need to be changed in order to proceed.



A screenshot of an Oracle form with the following field:

* Organization Name	Business Systems Analysis	
---------------------	---------------------------	---

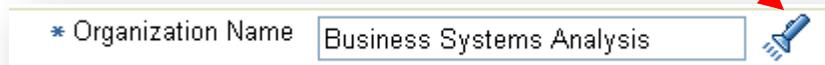
A red arrow points from the text below to the asterisk on the 'Organization Name' label.

- An Optional Field can be populated, but it does not need to be in order to complete the data change process.



c) List of Values vs. Free Text Fields

- Many fields are validated by a List of Values. Only values currently present in the list may be entered. A flashlight next to a field indicates that it is validated by a list.



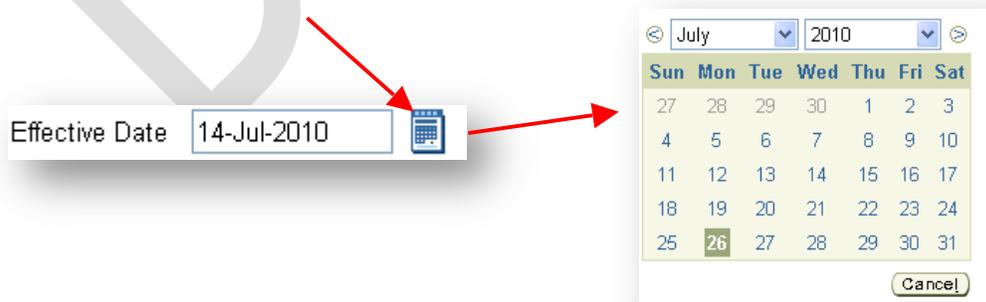
* Organization Name 

A red arrow points from the text above to the flashlight icon.

- Click on the flashlight to open a search window to search the list. Short lists will simply display all values if you click on the flashlight. Long lists will give you the option to search for values. Note that a broad search that may return an extensive list may cause the system to pause and think for a few seconds.
- Use the “Wild Card” – the percent symbol (%) – to facilitate searching for values in a list.
- Free Text fields allow the User to enter any value in the field. Note that all data entered in Oracle becomes a part of the Employee’s official file.

d) Date Fields

- Some fields require a date value. These fields are identified by the Calendar icon next to the field. The date can be typed in manually, using the correct date format, or the user can click on the Calendar icon to open a calendar and select the desired date.



Effective Date 

A red arrow points from the text above to the calendar icon. Another red arrow points from the calendar icon to the calendar window below.

July 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Cancel



6. Reviewing and Submitting Data Change Requests

- a) The Final Step for any Data Change Request is to Review and Submit the Request.

ORACLE Manager Self-Service

Home Logout Preferences Help

Transfer: Review

Effective Date 26-Jul-2010

Employee Name **Beckett, Joshua** Caltech UID **1841320**
Organization **Material Science** Supervisor **Champagne, Nathan**
Job **Staff Support-IC.U..1061.GENAD...**
Assignment Number **1841320**

Review your changes and, if needed, attach supporting documents.
● Indicates Changed Items.

	Current	Proposed
Assignment		
Department	Material Science	Biology Administration ●
Job	Staff Support-IC.U..1061.GENAD...	Staff Support-IC.U..1061.GENAD...
LOC Worker is a Manager	No	No
Employee Benefit Type	Staff	Staff
Key Staff?	No	No
Retiree Group	R2	R2
Union Member	No	No
Location		
Location	EAS-MATL	BIO-ADMIN ●
Country	United States	United States

- b) Review all of the data relevant to the Data Change Request.
- The current data for the selected employee is listed in the “Current” column and the new data is listed in the “Proposed” column.
 - Information that is changing as a part of this request is identified with a blue dot “●” next to the new data.



- c) Add Comments and Attachments before submitting Data Change Request to facilitate the review and approval process.

Additional Information

Attachments
To help approvers understand the request, you can attach supporting documents, images, or links to this action.
None [Add](#)

Approvers

Details	Line No	Approver	Approver Type	Order No	Category	Status	Delete
Show	1	Champagne, Scott	HR People	1	Approver		

[Add Adhoc Approver](#)

Comments to Approver

[Cancel](#) [Printable Page](#) [Save For Later](#) [Back](#) [Submit](#)

- d) Note who the next Approver is for the Request.
- e) Print a “Printable Page” version of the request if necessary. Users can print to PDF in order to maintain electronic copies of transactions or print paper copies.
- o An Audit Report is available which will show Users all pertinent details to any requests submitted.
- f) Click “**SUBMIT**” and wait for the Confirmation Page

