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.
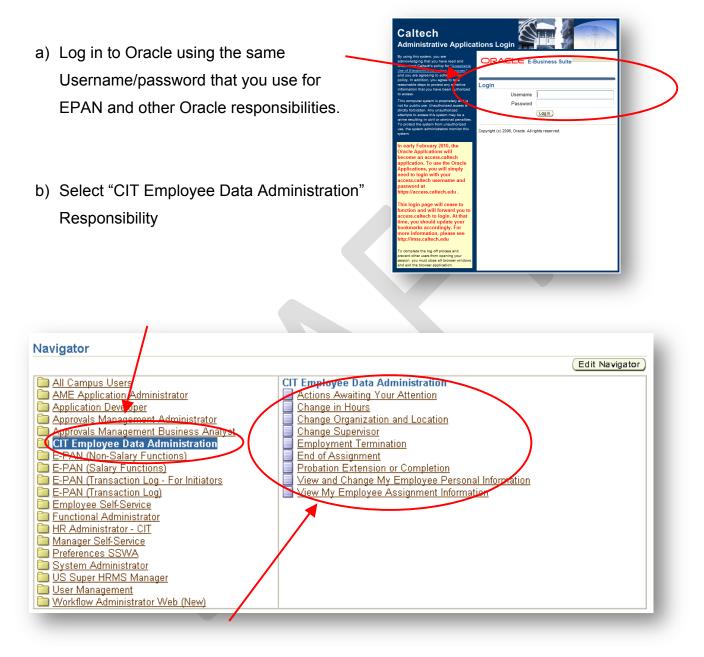
b) Select "CIT Employee Data Administration" Responsibility

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

- o **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.

- o **Name Search** – Users can search by Employee Name for any employee who the user has access to (based upon security rules).

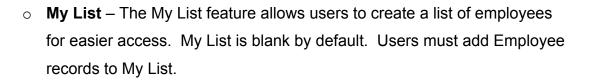   - ▪ Name Search is based on the format: Last Name, First Name.

- o **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

o **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.

▪ 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

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

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.

- 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

a) Always use the System Buttons to Navigate (not the Browser buttons)

- o **Cancel** – Cancel the Data Change being processed and return to the People in Hierarchy Screen.

- o **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.

- o **Back** – Return to the Previous Screen

- o **Next** – Save the data entered on this screen and proceed to the Next screen.

- o **Home** – Discard all Data entered and return to the list of Oracle responsibilities.

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.

c) Instructional Text and Tips – There are three different types of Instructional Text or Tips in Oracle: Page Instructions, Long Tips, and Short Tips

- o **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.

- o **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.

- o **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.
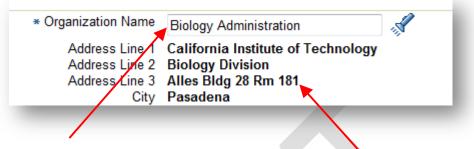
5. Understanding Oracle Fields

a) Enterable Fields vs. Informational Fields

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

b) Required Fields vs. Optional Fields

- o 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.
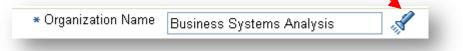

- o An Optional Field can be populated, but it does not need to be in order to complete the data change process.

c) List of Values vs. Free Text Fields

  o 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.

  ▪ 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.

  o 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

  o 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.

6. Reviewing and Submitting Data Change Requests

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

b) Review all of the data relevant to the Data Change Request.

    o The current data for the selected employee is listed in the "Current"
       column and the new data is listed in the "Proposed" column.

    o 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.

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