Frequently Asked Questions

Q What event code should I select for Annual Leave?

A Use event code UANNL. UANNL will use excess annual leave if available or regular annual leave if excess leave is unavailable.

Q How do I complete a Name or SSN change in HRM?

A Use the Employee Identification Change Form (EICF).

- ✓ Locate and view the employee on the Employee Profile Management activity folder (EPM).
- ✓ Click the Employee Profile Management vertical 3-dot menu.
- ✓ Select Create Employee Identification Change Form from the Related Actions.

Q Where can I find the UPDOC Templates?

A Enter UPDOCS in the Global Search.

- ✓ Select UPDOCS Upload Transaction Spreadsheet (HRM)
- ✓ Click the Upload Transaction Spreadsheet vertical 3-dot menu.
- ✓ Click Transaction Upload Template from the Related Pages.
- ✓ Enter the page code in the Type field (i.e. TADJ or OTPAY) and click the Apply button.
- ✓ Select the blue Template File Name to download the template.

Q How do upload UPDOCS?

A Enter UPDOCS in the Global Search.

- ✓ Select UPDOCS Upload Transaction Spreadsheet (HRM)
- ✓ Click the Upload Transaction Spreadsheet vertical 3-dot menu.
- ✓ Click Upload Spreadsheet from the Related Pages.
- ✓ Browse or drop complete UPDOCS template.
- ✓ Enter the Transaction Code and click the Upload button.

Q How do find my UPDOC files?

A From the home page select the Transaction Search quick link.

- ✓ For TADJ transaction select the Time quick link.
- ✓ For OTPAY transaction select the Employee quick link.
- ✓ Complete the search fields to help locate your files and click the Search button:
  - Transaction Code
  - Transaction Dept
  - Transaction Unit
  - Transaction Phase
  - Last Date (date UPDOC was uploaded to HRM)
  - Last User ID (user ID of employee who uploaded the file to HRM)

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Q What do I do with my UPDOC files once I find them?

A Once you find your upload files (note: be sure to use the gear to add Transaction Phase and Transaction Status to your columns).

- ✓ Verfiy the number of records match the number of employees uploaded.
- ✓ Select the files by checking the check box (note: you may select the check box on the header to select all).
- ✓ Click Grid Actions.
- ✓ Click Primary Actions.
- ✓ Click Validate.
- ✓ Remove the check from any lines that have rejected.
- ✓ Click Grid Actions.
- ✓ Click Primary Actions.
- ✓ Click Submit.
- ✓ Work the rejected transactions one at a time by clicking the Transaction ID to open the transaction, click the edit button, make the needed corrections, click the Validate button, click the Submit button, and click the Close button. Continue until all transactions have been submitted.

Q How can I locate my transactions?

A There are several options you may use to locate your transactions.

- ✓ You may use the Transaction Search quick link on the home page.
  - Select the appropriate search (Employee, Time, HRM General)
  - Use the desired Search fields to narrow your results, examples:
    - Enter the Employee ID to search for a specific employee.
    - Enter Transaction Dept and Phase to see all transaction for your department in the selected phase.
  - Be sure to click the Search button after entering your search criteria.
- ✓ You may use the activity folders top vertical 3-dot menu to view related transactions.
  - Click Related Transactions from the Related Pages.
  - The current Transaction Code and Employee ID will be defaulted.
  - The Tranaction Code may be removed to view all transactions related to the employee.
  - Be sure to click the Search button to view the transactions and again if you change your search criteria.

Frequently Asked Questions

Q How do I discard a transaction?

A Transaction that are in Draft phase may be discarded by selecting the transactions top vertical 3-dot menu and selecting Discard under the Primary Actions. Click the Yes button on the Discard Confirmation window.

Q How do I reject a pending transaction?

A Open the pending transaction, click the Reject button.

Q How do I correct a transaction that has rejected?

A Open the rejected transaction, click the Edit button, make the necessary corrections, click the Validate button, click the Submit button, and click the Close button.

Q What are warning messages?

A Warning messages are informational messages that are non-blocking. The yellow triangle with an explanation point indicates a warning message. You may still submit your transaction with a warning message.

Q What are error messages?

A Error messages are hard stops in the system. The red stop sign with an X indicates an error message. You cannot submit your transaction until the issue(s) have been resolved. Keep in mind, the number of errors received is not an indication of the number of fields that may need to be updated. You may receive multiple errors for one field.

Q Why do I have to tab twice?

A The system default is set to tab from field to pick-list to field. Good news, there is a setting you can change to bypass the pick-list when tabbing. The pick-list is still available, you just click on it when you need the assist. To bypass the pick-list when tabbing follow these steps:

- ✓ Click your profile name in the upper right-hand corner.
- ✓ Click Account Settings.
- ✓ Clcik the Preferences tab.
- ✓ Click the Enable Auto Tabbing check box.
- ✓ Click the Save and Close button.
- ✓ Click the OK button.