

# Personnel Actions Guide

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*new world ERP – Human Resources: Personnel Actions*



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## INTRODUCTION

Welcome to the new world ERP Personnel Actions Guide. Personnel Actions automates the activities required to initiate, approve and finalize changes to an employee's personal or work information. This manual is a guide to both the setup and processing aspects of Human Resources Personnel Actions.

The guide is divided into two sections:

**The System Administrator's Guide** will focus on the setup components necessary to create new employees and make changes to existing through the use of Personnel Actions. This will include detailed information on master files that must be set up such as roles, approval manager, and personnel action codes and forms. Also included are the security settings which will be utilized to enable workflow and tailor user options as needed.

**The End User's Guide** will describe the steps and workflow of how to maintain and update employee records through the use of Personnel Actions. It will demonstrate the proper sequence of creating a personnel action through to posting the record to an employee record in Workforce.

This document is available in Microsoft Word format to allow for customization to the organization's particular needs and procedures.

## SYSTEM ADMINISTRATOR'S GUIDE

### ROLES

The Role(s) to which a user is assigned controls what a user can process and what the user can view during Personnel Action Processing. To create a new role, navigate to *Maintenance>Logos Suite>Security>Roles* and click the **New** button on the bottom of the screen:

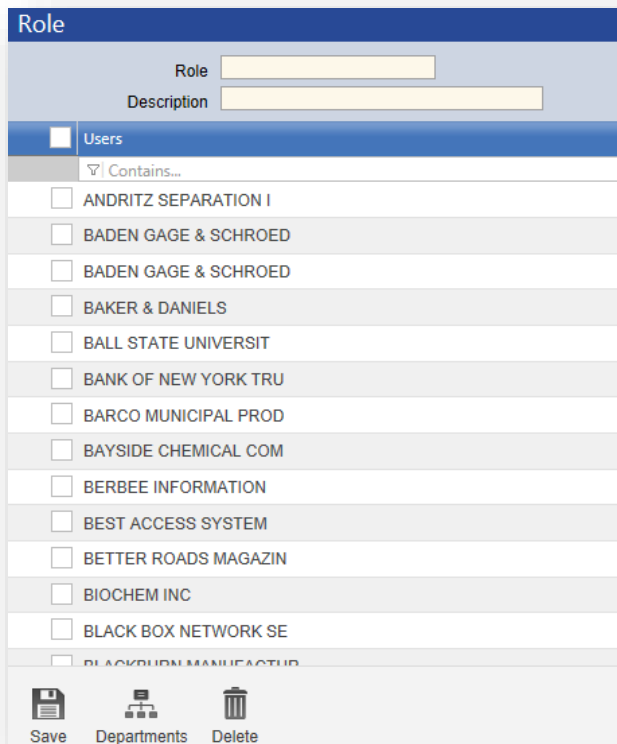
Roles		
<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Contains...	Contains...
<input type="checkbox"/>	LW Dept Entry	LW Dept Entry
<input checked="" type="checkbox"/>	LW Dept Super	LW Dept Supervisor
<input type="checkbox"/>	LW HR	LW Human Resources
<input type="checkbox"/>	HR Super User	HR Super User
<input type="checkbox"/>	DJ Test Role	DJ Test Role
1 - 5 of 5 records		
<input type="button" value="New"/>	<input type="button" value="Delete"/>	

Two fields, *Role* and *Description*, appear along with a list of all active Users. Complete the Role field with a code and the Description field with the description of the role. Assign at least one User to the Role by checking the box in front of the user(s). Click **Save** at the bottom of the page.

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**Note:** users can be assigned to multiple roles.

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Role

Role

Description

☐ Users

Contains...

☐ ANDRITZ SEPARATION I

☐ BADEN GAGE & SCHROED

☐ BADEN GAGE & SCHROED

☐ BAKER & DANIELS

☐ BALL STATE UNIVERSIT

☐ BANK OF NEW YORK TRU

☐ BARCO MUNICIPAL PROD

☐ BAYSIDE CHEMICAL COM

☐ BERBEE INFORMATION

☐ BEST ACCESS SYSTEM

☐ BETTER ROADS MAGAZIN

☐ BIOCHEM INC

☐ BLACK BOX NETWORK SE

☐ BLACKBURN MANUFACTUR

Save Departments Delete

Departments must then be associated with the users assigned to the newly created Role. Click the **Departments** button on the bottom of the page. A dropdown field appears with a list of all of the users assigned to the newly created role. Select a user and check the box in front of each department for which the user will have access to within this role. To select all departments, click in the box on the blue header line next to the word Departments. Repeat these steps for each user within the role. Departments must be added to users individually.

Associate Departments

User: [dropdown]

<input type="checkbox"/>	Departments
<input type="checkbox"/>	AES - Auburn Essential Services
<input type="checkbox"/>	BOW - Board of Public Works & Safety
<input type="checkbox"/>	BPD - Building, Planning & Development
<input type="checkbox"/>	BZA - Board of Zoning Appeals
<input type="checkbox"/>	City Hall - City Hall
<input type="checkbox"/>	Clerk - Clerk-Treasurer
<input type="checkbox"/>	Council - Common Council
<input type="checkbox"/>	Elec - Electric
<input type="checkbox"/>	Eng - Engineering
<input type="checkbox"/>	Fire - Fire
<input type="checkbox"/>	HR - Human Resources
<input type="checkbox"/>	IS - Information Systems
<input type="checkbox"/>	Legal - Legal Department

Save Cancel

## APPROVAL MANAGER

Approval Manager is the location for creating the processes that will allow users to add their approval during Personnel Actions. To create a new process in Approval Manager, navigate to *Maintenance>Logos Suite>Approval Manager* and click **New** at the bottom of the page. The following screen will appear.

*Name* A required field. Enter a name that will clearly identify the process being created

*Type* A required field. Select Personnel Action from the dropdown menu if it is not already defaulted.

*Sequential* Allows the approval process to take place in

*Approval* Sequential order from lowest to highest. If used, a user with the highest level of approval would not be able to approve a Personnel Action until all lower levels of the defined process had been approved. Check the box to use Sequential Approvals.

Click **Save**. Then click on the **Departments** button. This will open a list of the Departments available to be added to the newly created process.



**Add / Remove Departments**

PA HR Global

☒ Department (0 selected) ↑

- ☐ AES - Auburn Essential Services
- ☐ BOW - Board of Public Works & Safety
- ☐ BPD - Building, Planning & Development
- ☐ BZA - Board of Zoning Appeals
- ☐ City Hall - City Hall
- ☐ Clerk - Clerk-Treasurer
- ☐ Council - Common Council
- ☐ Elec - Electric
- ☐ Eng - Engineering
- ☐ Fire - Fire
- ☐ HR - Human Resources
- ☐ IS - Information Systems
- ☐ Legal - Legal Department
- ☐ Mayor - Mayor
- ☐ Municipal - Municipal
- ☐ Parks - Parks & Recreation
- ☐ Parks-Pool - Parks & Recreation - Pool

To select the departments associated with the process, check the box in front of the department name. To select all departments, click the checkbox located in blue next to the word **Department**. Click **Save**. Then click **Back**.

The page will refresh to the Edit Process screen, but now the departments selected will be shown in list form as well. Click **Approval Levels** to begin adding the levels of approval that will be needed to complete a personnel action. A new pop up will appear titled Manage Approval Levels. Click **Add**.

For each level of approval created, supply a Name and the number of Required Approvals. Click **Save**. The page will refresh and return to the Manage Approval Levels. Repeat the process for each level of approval needed in this process.

Once all levels have been created, return to the Manage Approval Levels and the ability to rearrange the order of the approvals by clicking and dragging the name of the approval is available. Click **Save** after making any changes to the order of levels.

The next step in Approval Manager is to associate users with the levels that were just created. After completing the creation of Levels, click the **Back** button on the bottom of the page to return to the Edit Process page.

Edit Process  
 LW  
 Name: LW  
 Type: Personnel Action  
 Sequential Approval: ☐  
 Department  
 AES - Auburn Essential Services  
 BOW - Board of Public Works & Safety  
 BPD - Building, Planning & Development  
 BZA - Board of Zoning Appeals  
 Back Departments Approval Levels Save

To associate the appropriate users, click on the name of the Department. The Manage Approvals Levels screen will appear as associated with the department selected. Click on a level name. The level will open with a list of users available to be associated. To select the users associated with the level, check the box in front of the user name. Click **Save**. The screen will refresh to the Manage Approvals Levels screen. Click on the next level for which users need to be associated and repeat until all levels have users associated with them.

Once Approval Manager has been completed, the list screen can be expanded by clicking on the plus sign in front of each Process, Department and Approval to show the detail of each section.

The screenshot shows the 'Approval Manager' interface. At the top, there's a header with 'Approval Manager' and an 'Effective Date' field set to '05/29/2014'. Below this is a tree view under 'Process' containing 'New Hire Finance'. Under 'New Hire Finance', there's a 'Department' section for 'Finance - Finance'. This section contains a table with columns 'Approval Level Name', 'Level', and 'Required Appr'. The table lists three levels: 'Department Manager' (Level 1), 'CFO' (Level 2), and 'HR Official' (Level 3). Each level has a 'User' list below it. The 'HR Official' row is highlighted in yellow. At the bottom, there's a status bar showing '1 - 1 of 1 records' and three buttons: 'New', 'Edit', and 'Create Event'.

Approval Level Name	Level	Required Appr
Department Manager	1	1
CFO	2	1
HR Official	3	1

A process in Approval Manager can be edited by highlighting the Process, a Department within the process or a Level under the process and clicking the **Edit** button on the bottom of the page. However, once the process has been used to complete a Personnel Action, changes must be made using Create Event.

To create an event, highlight the Process for which a change needs to be made and click on **Create Event** at the bottom of the page. Enter the effective date of the change. The page will refresh and will return to the list of processes. At the top of the page, select the effective date of the event just created. Highlight the process to be changed and click **Edit**. The ability to make changes to the process will be the same steps as when creating a new one.

## PERSONNEL ACTION FORMS

Personnel Action Form Configuration allows users to predefine the forms that will be generated during a personnel action. To configure a new form, navigate to *Maintenance>Human Resources>Personnel Actions>Forms*.

A blank configuration screen will appear for the creation of a new form:

*Load Saved Configuration* drop-down will show a list of any previously configured forms.

*Form Configuration Name* is a mandatory field. Enter a name that will clearly identify the form being created.

*Form Title* is a mandatory field. Title the form as it is to be printed.

*Form Subtitle* is not mandatory. Subtitle will print on the form if this field is completed.

*Shared* checkbox defaults checked to allow other users access to the configuration of the form. Uncheck the box if this form configuration should not be shared.

*Report Fields* define what information will appear on the form that is generated by a personnel action. Select each of the items to be printed on the form. All items within a section can be selected at one time by checking the box in front of the section. Click **Save**.

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**Note:** The Form Configuration lists all the available sections/fields in Personnel Actions; however, only those sections as defined in the Personnel Action Code under the Available/Edit Sections will be displayed on the form.

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## PERSONNEL ACTION CODES

Codes identify which Roles, Approval Process, Forms and Sections will be used during Personnel Actions. To create a new code, navigate to *Maintenance>Human Resources>Personnel Actions>Codes*. Click **New** at the bottom of the screen.

The screenshot shows the 'Personnel Action Code Entry' form. At the top, there is a blue header bar with the text 'Personnel Action Code List' and 'Personnel Action Code Entry'. Below the header is a tabbed interface with four tabs: 'General' (selected), 'Defaults', 'Roles', and 'Sections'. The 'General' tab contains the following fields and controls:

- Effective Dates:** A date range selector with left and right arrows and a dropdown arrow.
- Code:** A text input field.
- Description:** A text input field.
- Status:** A dropdown menu currently set to 'Active'.
- Start Date:** A date input field showing '06/05/2017' with a calendar icon.
- Last Processed Date:** A text input field.
- Approval Process:** A dropdown menu.
- Edit Approved Actions:** A checkbox that is checked.
- Use New Department for Approvals:** A checkbox that is unchecked.
- Form Configuration:** A dropdown menu.
- New Hire:** A checkbox that is unchecked.
- Allow New Job:** A checkbox that is unchecked.
- Secondary Job Only:** A checkbox that is unchecked.

At the bottom of the form is a toolbar with five icons and their corresponding labels: 'Save' (floppy disk icon), 'Save/New' (floppy disk icon with a plus sign), 'Create Event' (plus sign icon), 'Delete Event' (trash can icon), and 'Reset' (circular arrow icon).

### GENERAL

*Effective Dates* will automatically populate once the record is saved.

*Code* is a required field. Enter an identifying code.

*Description* is a required field. Enter the description of the code.

*Status* allows the user to inactivate a code that has previously been used. For a new code, the status should remain Active.

*Start Date* is the first date the code can be used in Personnel Actions.

*Approval Process* is a required entry selected from the drop-down.

Select *Edit Approved Actions* to let users edit personnel action records until the posting process. Deselect this check box to disallow edits once an approval has occurred.

*Form Configuration* is a required entry selected from the drop-down.

The *New Hire* checkbox is selected if the Code will be specific to the New Hire Process.

The *Allow New Job* checkbox is selected so that the **New** button will be available on the Entry page for adding a secondary Job. This is primarily an additional job if a change to an existing job was also occurring for the same Personnel Action.

The *Secondary Job Only* checkbox, if selected, will only allow a user to create a Secondary Job. This selection does not bring in any of the employee's existing positions (primary or other).

## DEFAULTS

The *Status*, *Status Event* and *Event Reason* fields are not required. Selections from these drop-downs are used as defaults for the Personnel Action.

## ROLES

Roles determine what departments/users are associated with the Personnel Action. Select Roles by moving them from the left to the right. Multiple Roles can be selected, but at least one is required.

## SECTIONS

Selections made in the Personnel Action Sections determine what sections can be viewed or edited during the Personnel Action. To select a section for view only, move the section from the left to the middle. Placing sections in **View** is optional. To select a section for editing during the personnel action, first move the section to the middle and then all the way to the right. At least one section must be moved to **Edit**.

For **New Hire** Personnel Actions, all sections are required.

For **Job Change** Personnel Actions, all job sections are required.

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**Note:** Unless a section is selected in either View or Edit, the section will not appear on the Personnel Action Form even if the form is configured to show the section.

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## SECURITY

User Security is setup in the Permissions screens accessed *Maintenance > Security > User Security / Security Template*. The template(s) can then be added to each appropriate user. In the Permissions interface, there are four Permission Types:

- Company Applications
- Non-Company Applications
- Company Documents and Notes
- Non-Company Documents and Notes

Feature Groups are defined permission groups pre-designed for new world ERP Modules. Personnel Actions is one of the Feature Groups. After selecting the Permission Type and the Feature Group the granter can then assign the follow security:

<i>Add</i>	Allows a user to add an item
<i>Change</i>	Allows a user to change an existing item
<i>Delete</i>	Allows a user to delete an existing item. The delete function is limited to certain system restrictions.
<i>View/Use</i>	Allows the user to view and use existing items.
<i>Print</i>	Allows the user to print the items

The **Check All** Button at the bottom of the screen selects all filtered permissions.

#### Permission Type – Company Applications

#### Feature Group – Personnel Actions

App	Component	Description	All	Add	Change	Delete	View/Use	Print
HR	HR Personnel Action	Ability to create, change and/or view Personnel Actions.	X	X	X	X	X	X
HR	HR Personnel Action Post	Ability to post a Personnel Action.	X		X			
HR	HR Personnel Action Validate	Ability to validate a Personnel Action.	X		X			
HR	Personnel Action Code Maintenance	Ability to create and maintain Personnel Action Codes.	X	X	X	X	X	X

## Permission Type – Company Documents and Notes

### Feature Group – Personnel Actions

App	Component	Description	All	Add	Change	Delete	View/Use	Print
HR	Personnel Actions Documents	Ability to create, change and/or view Personnel Actions Documents.	X	X	X	X	X	X
HR	Personnel Actions Employee Notes	Ability to create, change and/or view Personnel Actions Employee Notes.	X	X	X	X	X	X
HR	Personnel Actions HR Internal Notes	Ability to create, change and/or view Personnel Actions HR Internal Notes.	X	X	X	X	X	X

Personal Actions Documents also has columns to give the user the ability to *Check Out*, *Finalize* or set *Reminders*.

For those end-users that will be maintaining Roles and Approval Manager, two additional permissions will need to be granted. To find them, click on the **Search** button in the top right-hand corner of the permissions page. Leave *Permission Type* set to **Company Applications** and in *Component Name* type the word **Roles**. Select the appropriate columns to allow the user to *Add*, *Change*, *Delete* and/or *View/Use*.

Application	Component	All	Add	Change	Delete	View/Use	Print
Suite	Roles		X	X	X	X	X

Then change the *Component Name* to **Approval Manager** and make the appropriate selections. **Save**.



Permissions - HR-HRPayrollAdmin

Permission Type: Company Applications Feature Group: <All>

Component Name: Approval Manager Application:

Company: City of NWS

Search Reset

Application	Component	All	Add	Change	Delete	View/Use	Print
Suite	Approval Manager - Configuration	X	X	X	X	X	X

During the approval process of Personnel Actions, the following email notifications will be generated if user security is properly completed:

#### Approval Request Email --

You have been asked to respond to an approval request. Please click the link to respond.

<http://logos90hf/Logos/HumanResources/PersonnelActions/PersonnelActionsApproval.aspx?ID={0}>

#### Return Request Email --

Your approval request has been returned for more information.

Approver comment: I need you to fill in the employee information.

Click the link for more information

<http://logos90hf/Logos/HumanResources/PersonnelActions/PersonnelActionsApproval.aspx?ID=107>

#### Resubmitted after Return Email --

An approval request has been resubmitted with additional information. Please click the link to respond.

<http://logos90hf/Logos/HumanResources/PersonnelActions/PersonnelActionsApproval.aspx?ID={0}>

#### Rejected

Your approval request has been rejected.

Approver comment: I rejected this as this user failed the drug screening.

Click the link for more information

<http://logos90hf/Logos/HumanResources/PersonnelActions/PersonnelActionsApproval.aspx?ID=106>

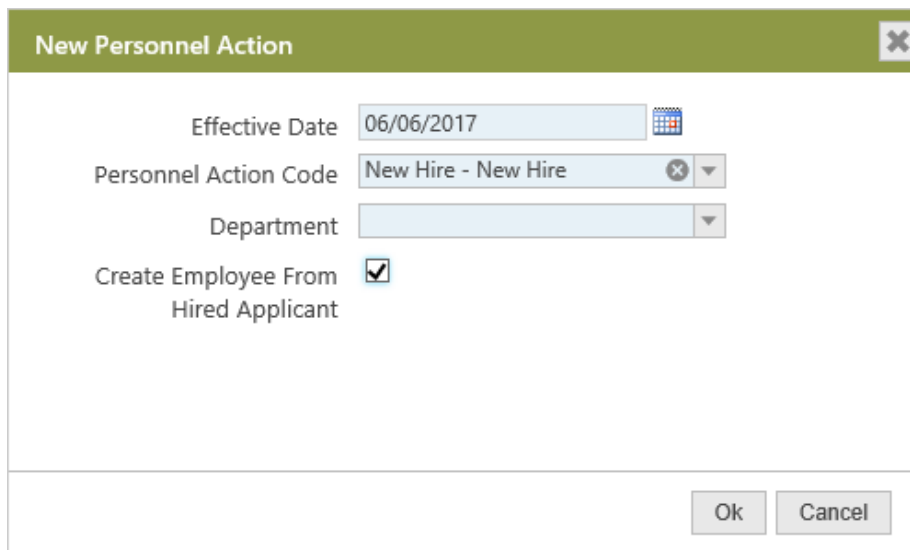
To complete user security, navigate to Maintenance > Logos Suite > Security> Users and complete the email address field for each user (click the *Login ID*). If all users in the email chain are not set up, the process will stop when it gets to the first user with an unspecified email.

## END USER'S GUIDE

To create a new Personnel Action record, navigate to Human Resources>Personnel Actions and click **New** at the bottom of the page.

### NEW HIRES

After clicking **New** on the Personnel Actions page, a pop-up screen will appear with three fields: *Effective Date*, *Personnel Action Code* and *Employee*. Enter the effective date of the personnel action and select a Personal Action Code for a new hire from the drop-down. The field for employee will be replaced with a field for *Department*, and a *Create Employee From Hired Applicant* check box will be added to the pop-up:



The screenshot shows a pop-up window titled "New Personnel Action" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Effective Date:** A text input field containing "06/06/2017" with a calendar icon to its right.
- Personnel Action Code:** A dropdown menu showing "New Hire - New Hire" with a clear (X) button and a downward arrow.
- Department:** A dropdown menu that is currently empty with a downward arrow.
- Create Employee From Hired Applicant:** A checkbox that is checked.
- Buttons:** "Ok" and "Cancel" buttons are located at the bottom right of the form.

Select the department where the new hire will reside. If you are importing a hired applicant from the new world ERP Applicant Tracking System or a third-party applicant interface, select *Create Employee From Hire Applicant*. (For more information on the import process, see "New Personnel Action" in the new world ERP online help.)

Click **OK**.

*Employee #* is not required if the Auto Assigned Number for Employee is setup in Human Resources Company Settings. Complete the field if the number is to be manually assigned. *Note:* If a duplicate employee number was entered manually, the Personnel Action Error Listing will display an error. There is no way to change the employee number at this point and the record will need to be cancelled.

*Effective Date* defaults with the date entered on the first page of the Personnel Action.

Required fields on this page are: *First Name, Last Name, Social Security #, Date of Birth, Gender, Race, Marital Status* and *Employment Status*. Complete appropriately. Click **OK**.

Each tab of the Personnel Action has sections that can be accessed with either the New or Edit Functions. When processing a New Hire Personnel Action, two pieces of information, Address and Job, must be completed in order to validate the record.

Address is located on the **Personal** tab. Click **New** on the **Addresses** line. The first address added must have the Primary Address box checked before clicking on **Save** or **Save/New**. Multiple addresses can be added as long as the validation set has been completed for multiple Address Types.

The **Jobs** tab contains the information needed to pay an employee. After navigating to this tab, click on the edit icon. Complete all necessary fields and click **Save**. (For detailed information on these fields, see the Workforce Administration manual or search the online help using the word Jobs.) To complete this Personnel Action, continue to **Common Links**.

## CHANGES

After clicking **New** on the Personnel Actions page, a pop-up screen will appear with three fields: *Effective Date*, *Personnel Action Code* and *Employee*. Enter the effective date of the personnel action, select a Personnel Action Code and select the employee for which the change is needed. If the Personal Action Code selected includes the option of changing the Job, an additional field, Position will appear. From the dropdown select only the position(s) that will be affected during this Personnel Action. If multiple positions are selected, and only one position has an actual change, when the record is posted to Workforce, all positions selected will show a new event created.

The screenshot shows a web application interface for a Personnel Action. The top navigation bar includes tabs for Personal, Employment, Jobs, Payroll Data, and Contracts. The left sidebar contains links for Documents, HR Internal Notes, and Employee Notes. The main content area is divided into three sections: Name, Addresses, and Demographics. The Name section shows the effective date (07/07/2014) and the primary name (Smith, John W). The Addresses section shows the effective date (07/07/2014) and a primary address (2113 Bunker CT, TROY, Michigan 48064). The Demographics section shows the Social Security # (444-99-8888), Date of Birth (10/13/1930), Marital Status (Married), and Gender (Male). At the bottom, there is a toolbar with icons for Print, Submit, Approve, Reject, Return, Validate, Post, Cancel, and Delete.

Depending on what sections were defined during the creation of the Personnel Action Code, not all tabs may appear. Those sections that were defined can be changed or added to with the use of the **Edit** or **New** buttons. Edit will change existing information. New will create additional information such as a second address or a secondary job.

**Note:** If the **Employment** tab is available for the Personnel Action, the Employment Status must be completed even if there is no change from the current status.

## COMMON LINKS

With the correct Security, users will have the ability to add **Documents**, **HR Internal Notes** and/or **Employee Notes** to a Personnel Record. These items remain with the Personal Action Record and are not posted to the Workforce Record. Employee Notes are the only items that can be printed on Personnel

Action Forms. To open a link, click on the desired item. A pop-up will appear from which you can add, edit or view a link.

## WORKFLOW

After creating a Personnel Action record, the workflow steps needed to complete the Personnel Action are as follows: **Submit, Approve, Validate** and **Post**.



Once changes are completed for the Personal Action, the action needs to be submitted, either by the user completing the changes or by a supervisor. This will move the process to the next step, Approvals. Approvals are either non-sequential or sequential as defined in Approval Manager.

### Non-Sequential Approval Process

Field Name	Field Description
<b>Approve</b>	<ul style="list-style-type: none"><li>• Upon submittal, the Personnel Action record will be available in the To Approve view for <b>all</b> users specified in the Approval Manager process on all levels.</li><li>• Highest level approver's approval, changes the Personnel Action's status to "Approved". Once approved, the record is ready for Validation.</li></ul>
<b>Return</b>	<ul style="list-style-type: none"><li>• Return always returns the Personnel Action record to the submitter.</li><li>• Re-submission is required to activate the approval process.</li></ul>

Field Name	Field Description
<b>Reject</b>	<ul style="list-style-type: none"> <li>Only the highest-level approver can reject in a non-sequential process.</li> <li>Lower level users can select the <b>Reject</b> button; however, the process fails and an error message is thrown.</li> <li>Reject ends process and record is locked down and moved to the Canceled list.</li> </ul>

### Sequential Approval Process

Field Name	Field Description
<b>Approve</b>	<ul style="list-style-type: none"> <li>Upon submittal, record(s) will be available in the To Approve View for the first level user defined in the Approval Manager process.</li> <li>Status column will update with the current level's approval level.</li> <li>Once all records are approved for the levels required in the Approval Manager set up, the status changes to Approved and the record is then available for Validation.</li> </ul>
<b>Return</b>	<ul style="list-style-type: none"> <li>Returns record to the previous level approver.</li> <li>If returned to the submitter, the record has to be resubmitted to start the approval process again.</li> </ul>
<b>Reject</b>	<ul style="list-style-type: none"> <li>Any approver in the chain can Reject the record.</li> <li>Reject ends process and record is locked down and moved to the Cancelled list.</li> </ul>

If the final Approver wishes to Validate immediately after adding approval, the page will need to be refreshed in order for the **Validate** button to become available. After clicking **Validate**, a pop-up will appear stating the status of the validation, whether valid or invalid. If invalid, a report will also pop-up behind the Logos screen listing the reason(s) for the error(s). To correct the error(s), return to the Personnel Action record and edit the appropriate section. *Note:* the corrections can be made by any one of the approvers.

The final step to move the Personnel Action record to Workforce is to post. In the open Personnel Action, click **Post** at the bottom of the screen. A pop-up will tell you the action is posted, the record will be removed from the active Personnel Action list and change(s) are now recorded in Workforce.

## ADDITIONAL ICONS

Three icons, **Print**, **Cancel** and **Delete** appear both on the Active Personnel Actions list page and on the opened Personnel Action.

- Print will print the Personnel Action Form that is associated with the type of Personnel Action.
- Cancel will remove the Personnel Action from the active list. Once a canceled the record can no longer be edited or re-opened, but can be viewed on the list page using the **Canceled** or **All** view.
- Delete will permanently remove the record from the database and can no longer be accessed.

To perform any of these actions on multiple records, from the list of Personnel Actions select records by using the checkbox in front of the Employee Number and then click on the appropriate icon.

Additionally, an icon is available to compare the information that currently exists on an employee record against the changes that have been made on the Personnel Action. Access a Personnel Action by clicking on the number. Click on **Compare** in the bottom right corner:

Personnel Actions

Personnel Actions - ALEXANDER, CAITLIN MICHELLE

① Level1 In Progress    ① Level2 Waiting

**Address**

▼ **Certifications**

▼ **AED - AED**

Title	Changed Value
Certification Type	AED - AED
Organization	AMERICAN RED CROSS
Certification Date	05/01/2011
Expiration Date	03/01/2013
Course Length	
Unit of Measure	
Default Hourly Amount	\$0.0000
Hourly Amount Override	
Default Hourly Percent	0.00 %
Hourly Percent Override	
Employer Course Cost	
Employer Expense Cost	
Employee Course Cost	
Employee Expense Cost	

► **CPR - CPR Certification**

► **FA - First Aid Certification**

► **Lifeguard - Lifeguard Certification**

► **Demographics**

► **Email Addresses**

► **Employee Education**

► **Employee Job**

► **Employment**

► **Name**

► **Phone Numbers**

**Skills**

Print Submit Approve Reject Return Validate Post Cancel Delete Entry

All sections designated in red text signify the changed sections. Fields with changed values are viewable by expanding the section name and changed fields designated in red text.

Users can toggle back to the entry page to make changes to the record by clicking on the **Entry** link in the lower right hand corner of the screen from the Comparator page.

## QUICK VIEWS

There are several ways to view the Personnel Actions page. The default is **Active**. To change the view, in the top-right corner, select a different view from the dropdown. Records are limited by the user's security.

Field Name	Field Description
<b>Active</b>	Filters by the active Personnel Actions for which a user is authorized and by department.
<b>To Approve</b>	Filters by those records that are waiting for approval. The Approval icon is available for adding a user's approval in this view. Multiple records can be selected for approval.
<b>To Validate</b>	Filters by those records that are waiting for validation. The Validate icon is available in this view in order to validate the record. Multiple records can be selected for validation.
<b>To Post</b>	Filters by those records that are waiting to be posted. The Post icon is available for posting. Multiple records can be selected to post.
<b>Posted</b>	Filters by records that have successfully posted. Posted records can no longer be edited.
<b>Canceled</b>	Filters by records that have been canceled. Canceled records cannot be edited or re-opened. The information is retained in the database for informational purposes only.
<b>All</b>	No Filters. All Personnel Action Records are listed.