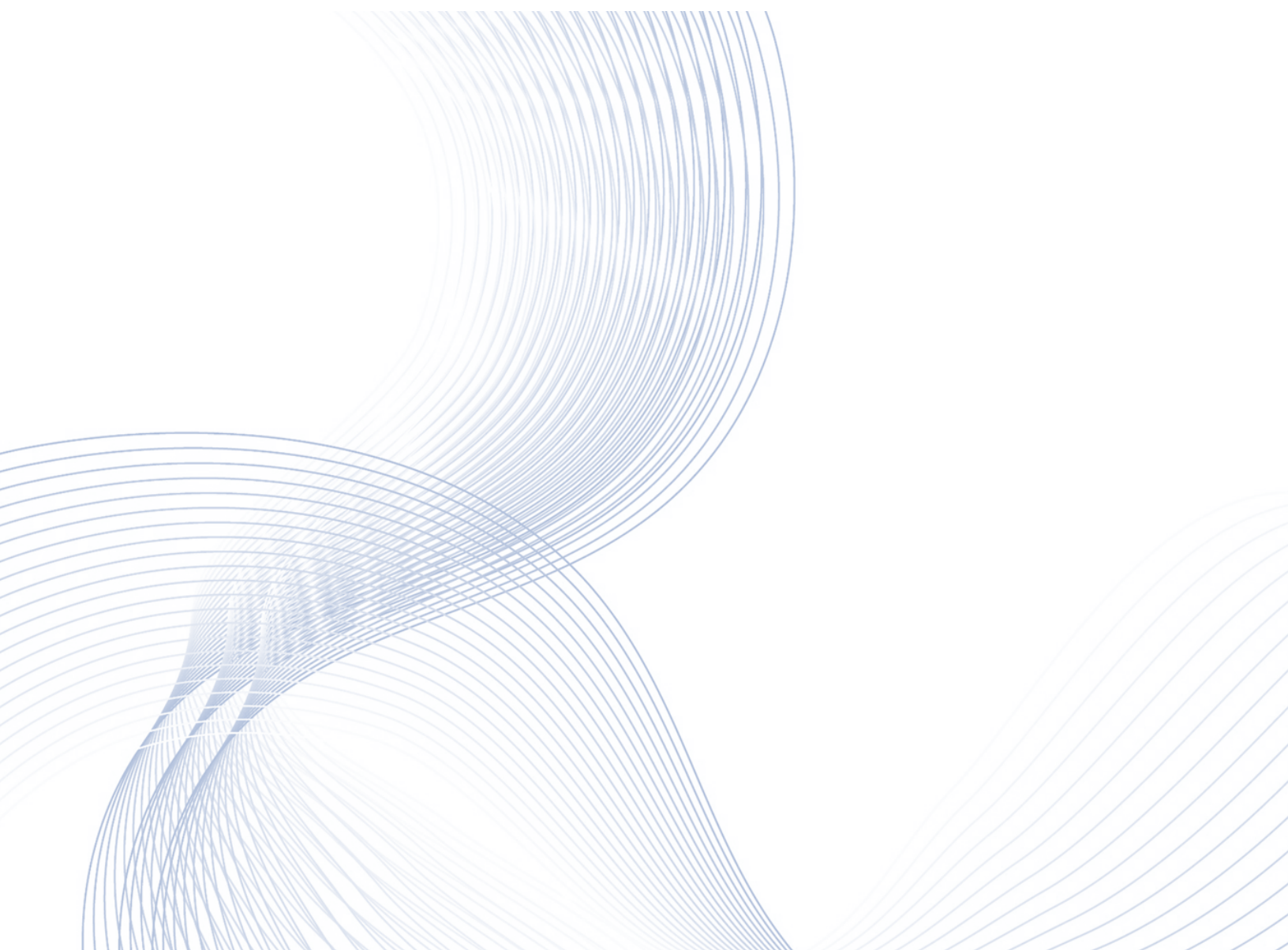


HRIS – Human Resources Information Solution

# **RESOURCE GUIDE: HRIS INTRO**

## **- HRIS NAVIGATION TUTORIAL**



# HRIS INTRO - HRIS NAVIGATION TUTORIAL

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## Introduction

The Human Resource Information Solution (HRIS) System introduces several concepts to the State of Arizona Human Resources (HR), Payroll (PR) and Benefits system users.

The Navigation Tutorial provides helpful information to identify and explain those new concepts. Concepts explained in this tutorial are important to understanding and demonstrating a basic ability to navigate within HRIS. This tutorial provides the background for learning the basics of the new HRIS system.

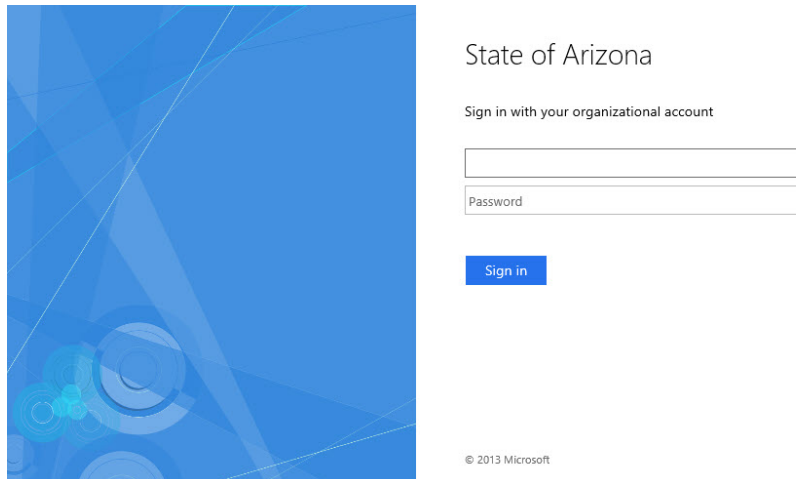
**Note:**

*This tutorial provides information basics about HRIS; it is NOT intended to train employees on how to perform HRIS processes. To receive training on HRIS processes, the user must complete the applicable job role training.*

Each section of this tutorial will follow a similar flow beginning with a concept introduction, important information and/or screen captures.

## Logging In to HRIS

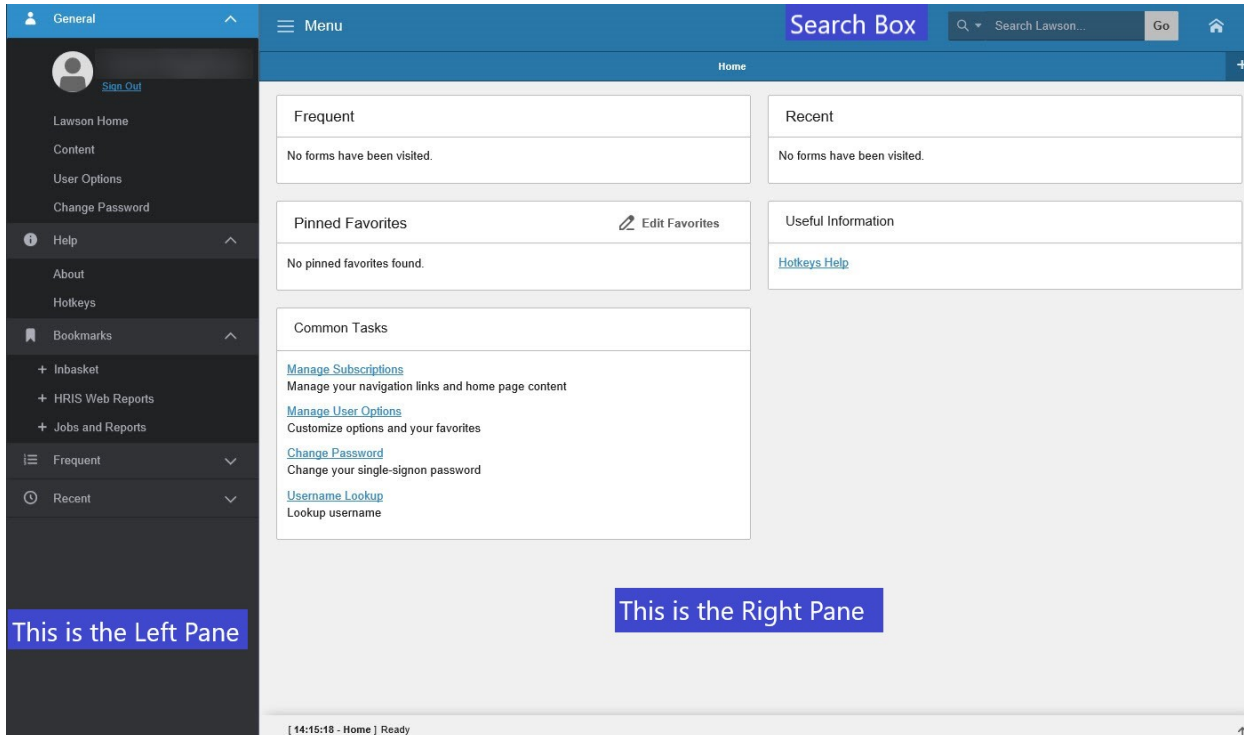
Each HRIS user is assigned a unique User ID. The user will then setup his/her password to access the HRIS system. To obtain a User ID, the agency must coordinate the necessary paperwork through the Agency Security Approver.



Once the user ID is setup, the HRIS user will go to the HRIS portal and log in. To access the HRIS portal, the user should go to the HRIS website at: <http://www.hr.az.gov/content/hris> and click on the **HRIS Portal Login**. The user will then be prompted with the screen above. The user will input his/her User ID and Password. Problems or questions, contact the HRIS Help Desk: E-mail: [servicedesk@azdoa.gov](mailto:servicedesk@azdoa.gov) or by Phone: 602.542.4700.

## The “Portal” Concept & Structure

After logging into HRIS, the system displays an opening page also known as the “Portal” homepage (see below). This homepage is the first step in gaining access to the HRIS Application Forms required when completing Human Resources (HR), Payroll (PR), and Benefits related tasks.



The Portal homepage is made up of two sections: the left pane and the right pane.

- In the left pane, users will see optional menus that can be used to navigate to different parts of HRIS forms, these links are called Bookmarks (e.g., A form may be broken out into multiple pages called tabs or Bookmarks. For example, a page may include a Main Bookmark, a Personal Bookmark, etc. Each Bookmark will have different information about the Employee. Users will navigate within the bookmarks by clicking on them in the left pane).
- The right pane will display the fields (or content) users will need to fill out to complete HRIS related tasks (e.g., A form may contain the Name, Hire Date, etc., to hire an Employee. An HR user would fill these in and then complete additional steps to perform a task). The content on some pages will not allow changes and will be view only depending on the purpose of the HRIS form.

There are additional features on the Portal homepage that will be important to HRIS Users. Those features include the Search Box, the Go To option, Preferences and the Help Option (see graphic above). These features will be discussed in greater detail in the later sections of this tutorial.

## Navigating to HRIS Forms

HRIS Users will navigate HRIS using the Search box available on all HRIS forms in the top right corner. To navigate to the form, the user will input the form identifier (typically a two digit alpha code, followed by an up to 3 digit numeric code – e.g., HR11.1, XP52.1, etc). Each lesson will contain the specific form that the user will need to perform his/her task. When inputting the form number, the user can shorten the form identifier and will still receive the same results (e.g., HR11, XP52). The only time a full form identifier is required in full is when the same identifier appears in the first 4 positions (e.g., XP52.1 and XP52.4).

## HRIS Form Properties

After using the search box to navigate to an HRIS form to perform a task, a user will encounter one of five types of HRIS forms. These forms will have a similar look, but they will function differently. The five types of HRIS forms include:

- Single Record Forms
- Detail Record Forms
- Header/Detail Forms
- Inquiry Forms
- Sub-forms

These different types of forms will be used to update Employee records in the HRIS database and/or perform Employee data inquiries.

Within each form, certain fields will be required and certain fields will be optional.

## Single Record Form

A Single Record Form displays one Employee record at a time on the form. This type of form will have one or more key fields at the top above the grey divider line. These key fields are important to determine what Employee record will be displayed.

- The example below provides a portion of the single record form used by Agency Payroll to setup Employee direct deposit accounts. This form contains 4 key fields: Company, Employee, Distribution Order and Country. These key fields must be filled out to determine which of the Employee's 3 available direct deposit records a user wants to add/change/delete.

## Detail Record Form

A Detail Record form displays multiple records at a time for one or more Employees (depending on the form). Each record appears as a separate row, and will have the same set of fields arranged on each line. The line or record is called a detail line. This form will also contain one or more key fields at the top to determine what records to display on the detail lines.

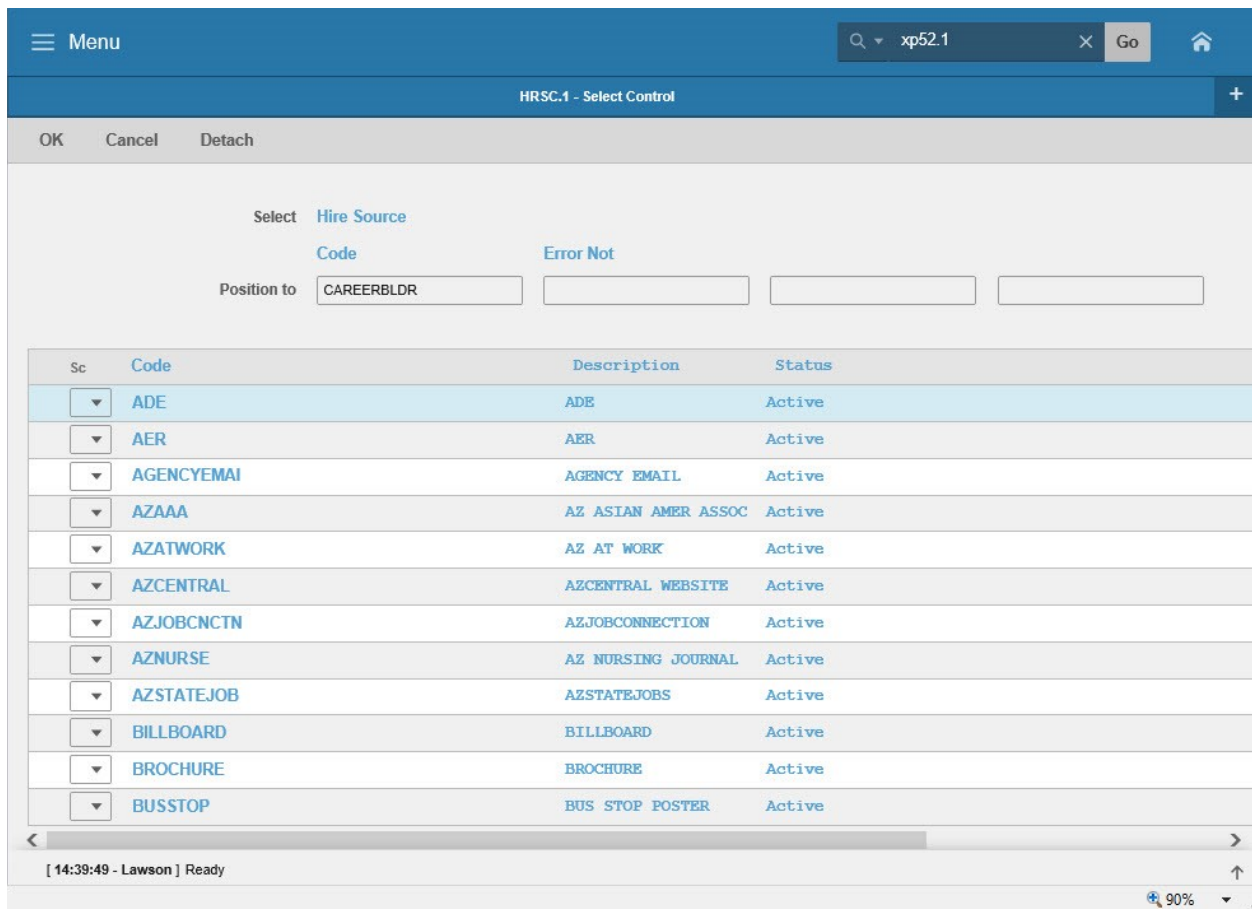
- The example below contains a portion of the Detail Time Entry Form to make adjustments to Employee time records. This form contains three key fields: Company and Employee. These fields are used to determine which Employees record will be displayed on the form. Each row is updated independently depending on what the user of the form places in the FC field.

The FC field is the most critical field on this form. FC defines which of the detail lines a user wants to update. If multiple rows are being updated, then the user has to have the FC field defined for each of those rows. On most forms, the FC options are Add, Change and Delete.

## Header/Detail Forms

A Header/Detail form looks very similar to a Detail Record form. This form contains two separate sections: the header (above the grey line) and the detail area (below the grey line). The header section contains one or more key fields identifying the record. The detail area contains multiple lines, each line representing a record related to the header.

- The example below shows the form used by the HRIS team to define different HR Codes in the HRIS system. The selected code refers to the Hire Sources that can be selected on the Individual Action Form (XP52.1). Once the HRIS team defines these HR Codes, Agency users will see them available on different forms throughout the HRIS system.



The screenshot shows a software window titled "HRSC.1 - Select Control". At the top, there is a search bar with "xp52.1" and a "Go" button. Below the search bar, there are buttons for "OK", "Cancel", and "Detach". The main area is labeled "Select Hire Source". It contains a "Code" field with the value "CAREERBLDR" and an "Error Not" field. Below this is a table with the following data:

Sc	Code	Description	Status
▼	ADE	ADE	Active
▼	AER	AER	Active
▼	AGENCYEMAI	AGENCY EMAIL	Active
▼	AZAAA	AZ ASIAN AMER ASSOC	Active
▼	AZATWORK	AZ AT WORK	Active
▼	AZCENTRAL	AZCENTRAL WEBSITE	Active
▼	AZJOBCTN	AZJOBCONNECTION	Active
▼	AZNURSE	AZ NURSING JOURNAL	Active
▼	AZSTATEJOB	AZSTATEJOBS	Active
▼	BILLBOARD	BILLBOARD	Active
▼	BROCHURE	BROCHURE	Active
▼	BUSSTOP	BUS STOP POSTER	Active

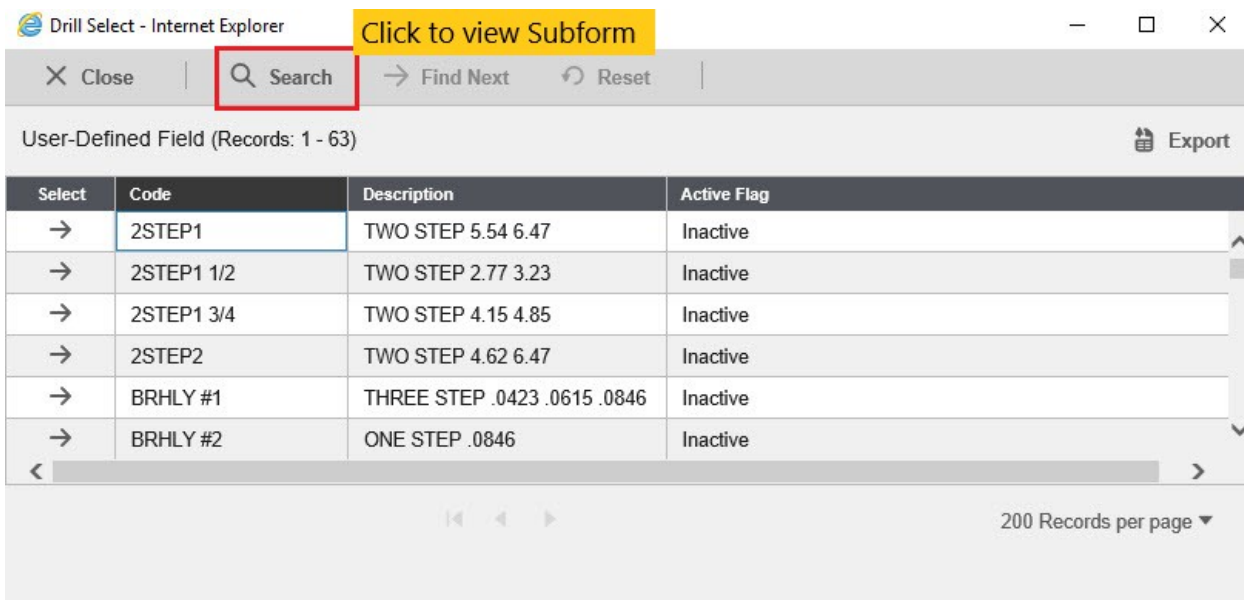
At the bottom of the window, there is a status bar showing "[ 14:39:49 - Lawson ] Ready" and a zoom level of "90%".



## Inquiry Forms

An Inquiry form looks very similar to the detail record form and header/detail form. The main difference is that Inquiry Forms only allow users to lookup Employee information. These forms cannot be used to Add, Change or Delete information from the HRIS database. Inquiry forms have a header and detail section. The header section will be used to complete the key fields necessary to outline what information will be displayed on the form. The detail section will display the results of an inquiry.

- The example below shows one of the Inquiry forms that can be used by Agency HR or PR users to view Employee leave plan balances. The key fields at the top include: Company, Employee and Plan. After the user completes these fields, he/she will see the transaction history of all accruals, usage and adjustments made to the requested plan for the requested Employee. This Inquiry form can show one plan, per Employee at a time.



Drill Select - Internet Explorer

Click to view Subform

Close Search Find Next Reset

User-Defined Field (Records: 1 - 63) Export

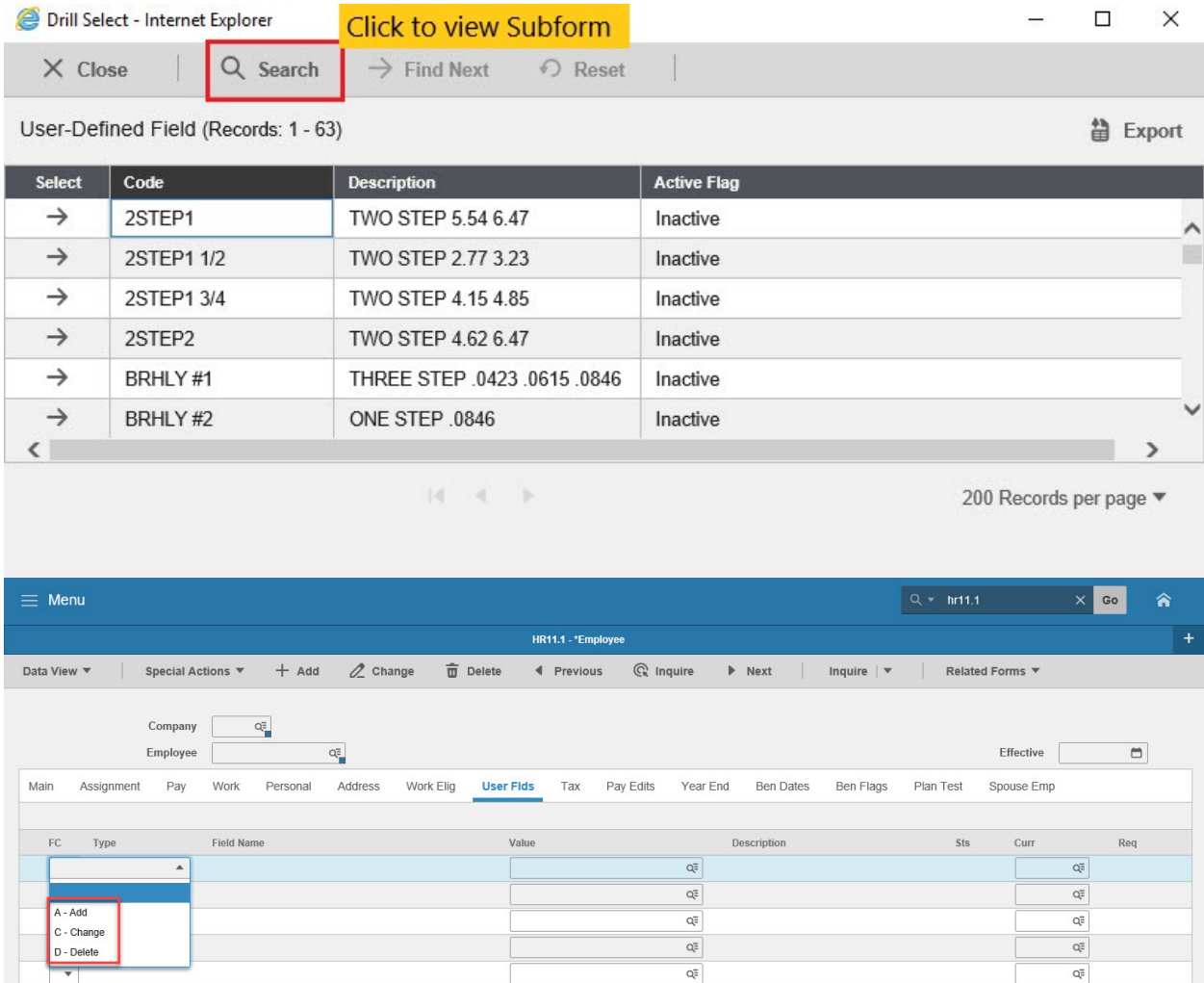
Select	Code	Description	Active Flag
→	2STEP1	TWO STEP 5.54 6.47	Inactive
→	2STEP1 1/2	TWO STEP 2.77 3.23	Inactive
→	2STEP1 3/4	TWO STEP 4.15 4.85	Inactive
→	2STEP2	TWO STEP 4.62 6.47	Inactive
→	BRHLY #1	THREE STEP .0423 .0615 .0846	Inactive
→	BRHLY #2	ONE STEP .0846	Inactive

200 Records per page

## Subform Forms

A subform is an HRIS form only accessible from within another HRIS form. Subforms provide additional fields to capture optional information related to the information on the main HRIS form. Subforms are identified as underlined blue links on the main HRIS form.

- The form below is used by the HRIS Team to define important codes, such as Alphanumeric User Fields throughout the HRIS system. The subform is used to define the various values for each of these different codes (e.g., ANNUAL LEAVE PLAN, CASH/COMP, etc.). To access the subform, the user would click on the **Values** link; this will open the subform for that specific HR Code. For example, when you click on the 'Values' link for ANNUAL LEAVE PLAN, it opens the subform below and shows various types of leave plans. The second image displays the subform that opens on top of the main HRIS form. The user would then select applicable information from the subform, save the changes, and click Close. The user would then be returned to the main HRIS form. Depending on your job role, you may or may not have access to the various subforms.



Drill Select - Internet Explorer Click to view Subform

Close | Search | Find Next | Reset

User-Defined Field (Records: 1 - 63) Export

Select	Code	Description	Active Flag
→	2STEP1	TWO STEP 5.54 6.47	Inactive
→	2STEP1 1/2	TWO STEP 2.77 3.23	Inactive
→	2STEP1 3/4	TWO STEP 4.15 4.85	Inactive
→	2STEP2	TWO STEP 4.62 6.47	Inactive
→	BRHLY #1	THREE STEP .0423 .0615 .0846	Inactive
→	BRHLY #2	ONE STEP .0846	Inactive

200 Records per page

---

Menu hr11.1 Go Home

HR11.1 - \*Employee

Data View | Special Actions | Add | Change | Delete | Previous | Inquire | Next | Inquire | Related Forms

Company  Employee  Effective

Main | Assignment | Pay | Work | Personal | Address | Work Elig | User Flds | Tax | Pay Edits | Year End | Ben Dates | Ben Flags | Plan Test | Spouse Emp

FC	Type	Field Name	Value	Description	Sts	Curr	Req
			<input type="text"/>			<input type="text"/>	
			<input type="text"/>			<input type="text"/>	
			<input type="text"/>			<input type="text"/>	
			<input type="text"/>			<input type="text"/>	

A - Add  
C - Change  
D - Delete

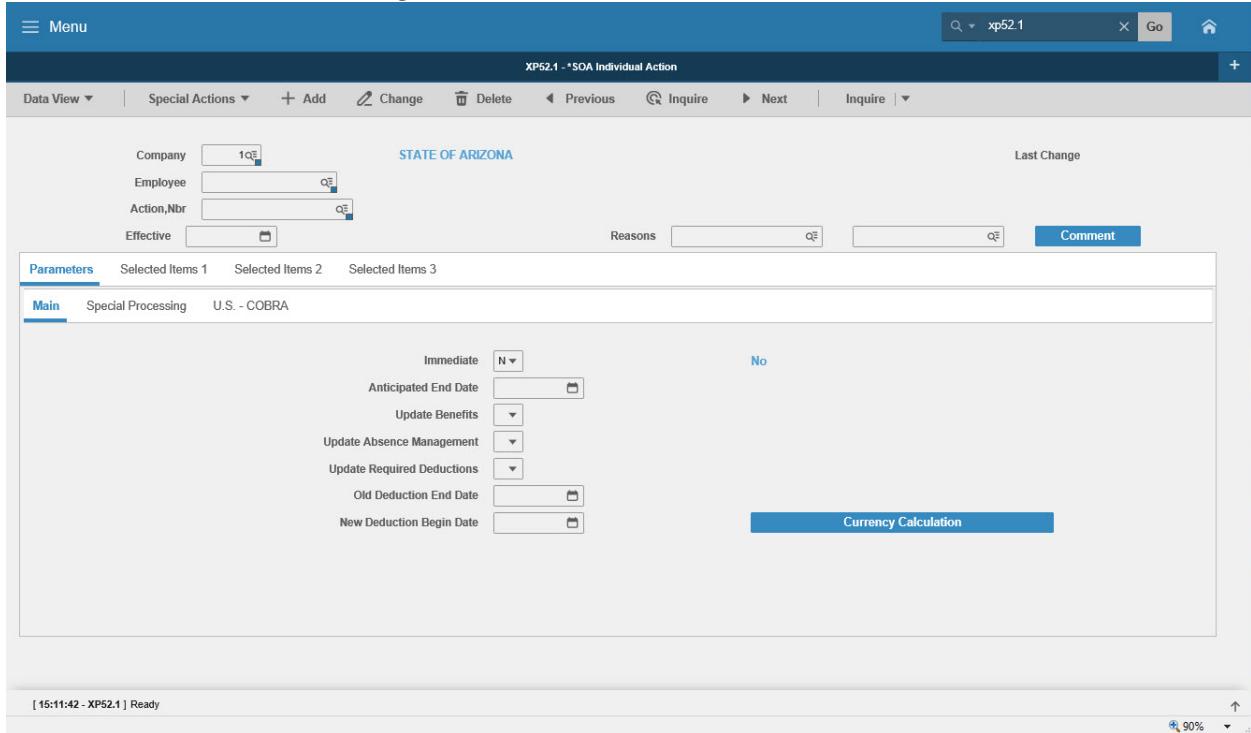
## Form & Field Actions used on HRIS Forms

Form and Field Actions are used on HRIS forms to process the different actions being completed on Employee records.

- Form actions appear as buttons on the Form Action bar at the top of each type of HRIS Forms. The form action bar contains various buttons to perform specific actions on HRIS records. Actions may include adding, changing, inquiring, or deleting a record. Form actions will be used on all types of HRIS forms.
  - The example below shows the form action bar at the top of the Individual Action form used by Agency HR staff to hire, rehire, separate and perform additional personnel actions on Employee Records. The buttons on this bar are used at different points in the process to lookup information, fill default information, and then lastly to add/or change the action for processing in the system. Specific instructions on using these buttons are available to agencies in the Job Role training for the specific task.

- Field actions appear only on detail and header/detail record forms. The field actions, or FC column, are used to make updates to specific rows within an Employee’s Record. The field actions are displayed as drop down menus within the detail portion of the form. These fields signify for each row whether information is being added, changed or deleted from the Employee’s record.
  - The example below shows the field actions for the form used by Agency Payroll staff to create adjustment time records for an Employee. Each adjustment would appear as a separate row on this form. When making updates, each row would have to

signify whether it is being added, changed or deleted. After the field actions are defined, the user would click on the form actions at the top of the form to save his/her changes.



The screenshot displays a web-based HRIS interface for processing an individual action. At the top, a navigation bar includes a menu icon, the text 'Menu', a search bar with 'xp52.1', and a 'Go' button. Below this is a toolbar with icons for 'Data View', 'Special Actions', '+ Add', 'Change', 'Delete', 'Previous', 'Inquire', 'Next', and 'Inquire'. The main content area is titled 'XP52.1 - SOA Individual Action' and shows the following fields and options:

- Company:** A dropdown menu with '10E' selected.
- Employee:** A text input field with a search icon.
- Action,Nbr:** A text input field with a search icon.
- Effective:** A date selection field.
- Reasons:** Two text input fields with search icons.
- Comment:** A blue button.
- Parameters:** A section with tabs for 'Main', 'Special Processing', and 'U.S. - COBRA'. Under 'Main', there are several options:
  - Immediate:** A dropdown menu with 'N' selected.
  - Anticipated End Date:** A date selection field.
  - Update Benefits:** A dropdown menu.
  - Update Absence Management:** A dropdown menu.
  - Update Required Deductions:** A dropdown menu.
  - Old Deduction End Date:** A date selection field.
  - New Deduction Begin Date:** A date selection field.
- Currency Calculation:** A prominent blue button.

At the bottom of the interface, a status bar shows '[ 15:11:42 - XP52.1 ] Ready' and a zoom level of '90%'.

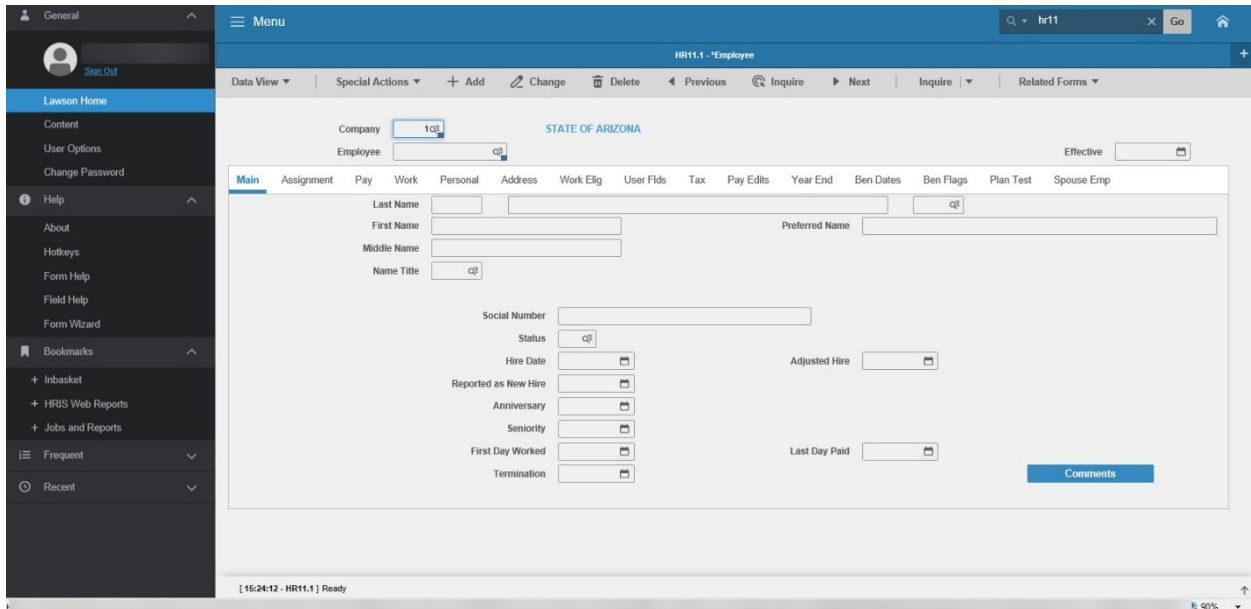
## Tabs and Related Links

As mentioned in Portal, each HRIS Form is structured within the right pane. The right pane displays the content of the form and is where the user views or enters his/her various actions. The left pane is used to store bookmarks related to the HRIS Form.

### Tabs

HRIS created the tabs in the left pane. These tabs display immediate access to employee information within the HRIS form.

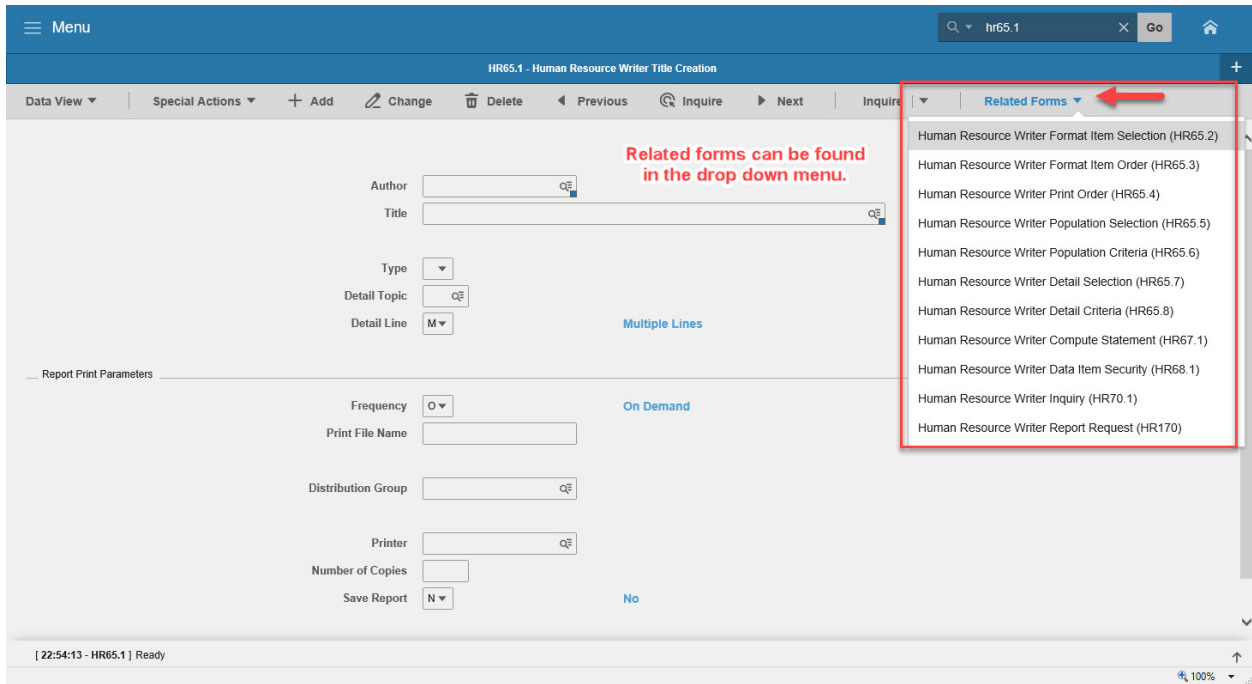
- The form below shows the Employee Master Record (HR11.1). The Form has a number of tabs listed. They include: Main, Assignment, Pay, Work, etc. Each of these tabs shows additional fields with information about the Employee. To access a tab, the user would click on the tab for the information he/she wants to display.



### Related Forms

When working on a specific HRIS form, the Related Forms menu may appear in the left pane. This menu provides quick access to other HRIS forms related to the form currently visible.

- The form on the following page shows the HR Writer Title Creation Form. This form is used as part of the HR Writer Report writing product. Click on **Related Forms** as show below, a list will display select one number HRIS would then open that form for the user to input information.



Menu hr65.1 Go

HR65.1 - Human Resource Writer Title Creation

Data View | Special Actions | + Add | Change | Delete | Previous | Inquire | Next | Inquire | **Related Forms**

**Related forms can be found in the drop down menu.**

Author

Title

Type

Detail Topic

Detail Line  Multiple Lines

Report Print Parameters

Frequency  On Demand

Print File Name

Distribution Group

Printer

Number of Copies

Save Report  No

[ 22:54:13 - HR65.1 ] Ready

It is important for a user to understand with Related Forms, the user MUST save his/her changes before moving on to another form. HRIS will not automatically save your changes, and changes could be lost if a form under Related Forms is clicked before the changes are saved.

## HRIS Security

Access to HRIS forms is secured by HRIS system rules and restrictions. HRIS has developed a number of HRIS Job Roles in the areas of HR/PR/BN, Taxes and Labor Distribution. Each HRIS Job Role has a set of forms assigned to it. As Employees are assigned roles in their agencies, and complete required training, they are given access to forms applicable to their job responsibilities.

- Example – Agency Timekeeper Specialist job role allows agency staff the forms to input Employee Time Records. This role does not have access to the HR forms that display SSN, or the Payroll forms to setup direct deposit.

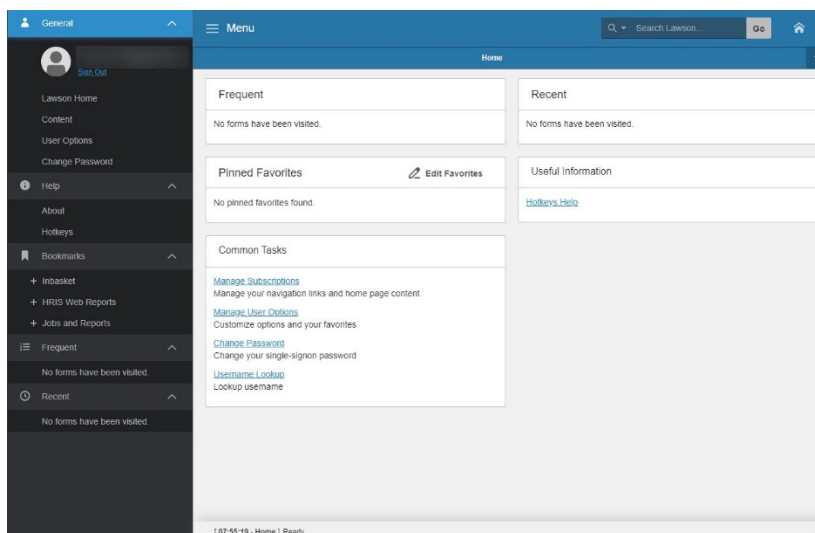
When a user attempts to search on a form and receives the message “0 hits for XX”, that means the user does not have security rights to that form. If he/she is supposed to have access to the form, they need to contact the Agency Security Approver.

If a user with view only access attempts to perform an action on a form and clicks the add or change buttons, he/she will receive the message “Security Violation” in the bottom left corner of the screen.

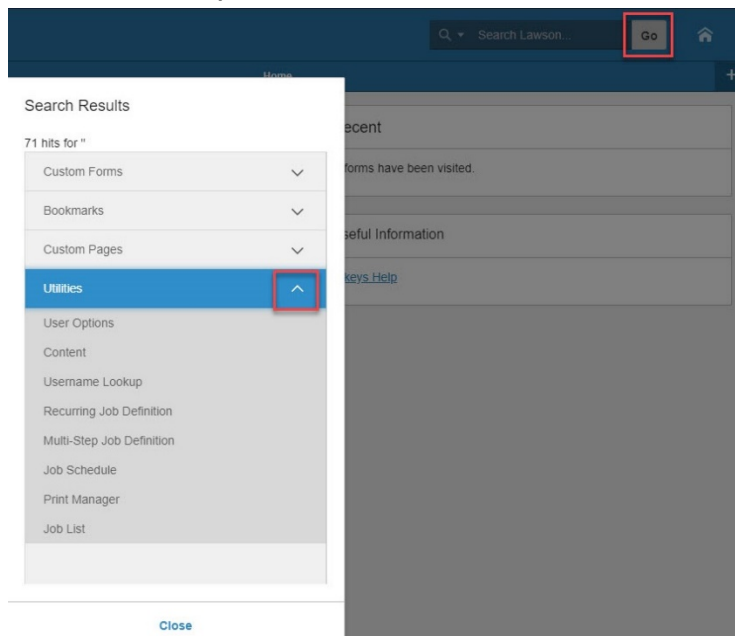
Although an Employee may have security to a form, not all of the information on the form may be available to the Employee (e.g., Payroll users may have access to the Employee Master Record (HR11.1) to lookup Employee information, but they are not allowed access to the SSN field). The Employee Master Record is discussed in more detail in the HRIS Basics training.

## Additional Portal Features

There are three additional features available in the top right corner of each HRIS form to assist users with the HRIS System. The links include Go To, Preferences and Help.



## Preferences Option



The Preferences menu contains two options: Content and User Options.

- The Content feature is used to add additional Bookmark groups to an Employee's access. For example, this is where the feature to view HRIS Web Reports would be added. Availability of these links depends on the users security and HRIS Job Role.
- The User Options feature allows for personalization of the HRIS portal home page. The options include feature to determine how application forms and fields are displayed. In addition, users can select default Lawson Printers (at this time, Lawson printers are not available). The final option allows users to elect the Default Report Type.
  - **Users should not change the default Locale or Data Area.**
  - It is not recommended that users select the List Style Presentation. This changes how each HRIS form opens, and does not display the form in its entirety.
  - If users select the Display Field Help option, HRIS will display field help for every field on every form. In all likelihood, displaying field help all the time will be unnecessary and a burden to most users. At any time, a user may still access field help when needed from any form by clicking Help in the upper right corner next to Preferences. The field help feature will remain on until the user moves to a different form or turns it off. To turn off field help, the user will click back on Help, then Field Help. (see next page for more details).



☰ Menu

User Options +

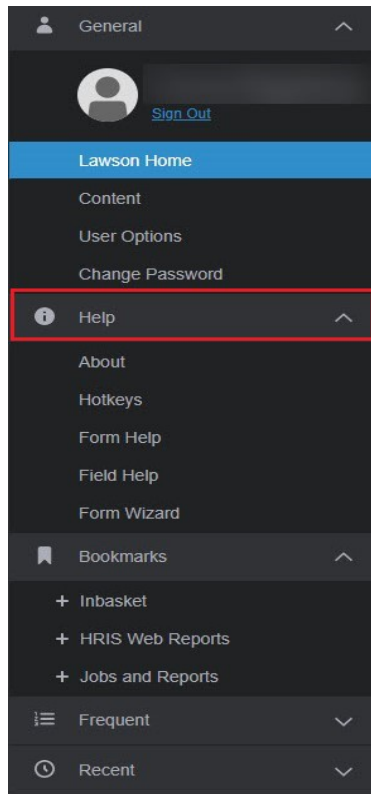
OK Cancel

General Drill Favorites Hotkeys Theme Navigation

<p><b>Locale</b>  <input type="text" value="default"/></p> <p><b>Data Area</b>  <input type="text" value="PROD"/></p> <p><b>Value Separator</b>  <input type="text" value="Comma"/></p> <p><b>Default Report Type</b>  <input type="text" value="Text"/></p> <p><b>Default Printer</b>  <input type="text" value="HRD21cp"/> <input type="button" value="Q"/></p> <p><b>Recover Tabs</b>  <input type="text" value="Ask each time"/></p>	<ul style="list-style-type: none"> <li><input type="radio"/> Show Product Line in Page Header</li> <li><input type="radio"/> Auto Select Required Fields</li> <li><input type="radio"/> Display Field Help</li> <li><input type="radio"/> Allow logging to console</li> <li><input type="radio"/> Enable accessibility behaviors</li> <li><input type="radio"/> Use Client Machine Time Zone for Job Schedule, Job Submit, and Print Manager</li> <li><input checked="" type="radio"/> Highlight key and required fields</li> <li><input type="radio"/> Shrink forms to fit on screen</li> <li><input checked="" type="radio"/> Enable Frequent and Recent Forms</li> </ul> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Clear Frequent and Recent Forms"/> </div>	<p><b>Default token view</b>  <input checked="" type="radio"/> Form <input type="radio"/> List View <input type="radio"/> List Mode</p> <p><b>List View settings</b>                  Number of Records  <input type="text" value="500"/></p> <p>Enter form names to exclude from List View processing (separated by semi-colon)  <input type="text"/></p> <p><b>List Mode settings</b>                  Number of Records  <input type="text" value="200"/></p>
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[ 08:11:35 - User Options ] Ready ↑

## Help Option



The Help option provides access to various online help within HRIS. Information is accessible from every application form, so there is no need for bulky printed documentation. Help options include:

- About – Learn what version of HRIS you are using.
- Hotkeys – Find a list of HRIS keyboard functions
- Form Help – Understand more information about a particular Form’s function. This feature is not accessible from the Portal Home Page; you must be on an HRIS form to see this option.
- Field Help – Understand a particular Field’s function. This feature is not accessible from the Portal Home Page; you must be on an HRIS form to see this option.

Users are encouraged to check out the Help section and try these options to uncover user benefits.

## Hot Keys

Hotkeys are keyboard shortcuts used to quickly perform specific operations with keyboard keystrokes.

Lawson		Infor Lawson ERP Forms	
Action	HotKey	Action	HotKey
Perform Submit Action	F12	Form Transfer	F8
Perform Close/Cancel Action	Esc	Open/Select Field Context	Enter
Perform Refresh Action	Ctrl+Shift+F5	Move to Action Selection	F9
Perform Delete Action	Ctrl+Shift+D	Perform Add Transaction	Ctrl+Shift+A
Perform Next Action	Ctrl+Shift+N	Perform Change Transaction	Ctrl+Shift+C
Perform Previous Action	Ctrl+Shift+P	Perform Inquire Transaction	Ctrl+Shift+I
Perform Page Up Action	PageUp	Clear To End of Form	Ctrl+Shift+K
Perform Page Down Action	PageDn	Clear Entire Form	Ctrl+Shift+X
Tab Page Up	Ctrl+PageUp	Clear Current Field	Ctrl+Shift+Y
Tab Page Down	Ctrl+PageDn	Open Define Screen	Ctrl+Shift+F
Position in First Field	Ctrl+Alt+F	Open Attachments Screen	Ctrl+Shift+T
Display Field Help	Ctrl+Shift+H	Open Drill Screen	Ctrl+Shift+R
Display Form Help	Shift+F1	Copy Detail Field	Shift+F2
Display Hotkeys Help	Alt+K	Copy Detail Field Inverse	Ctrl+Shift+F2
Position in Search Box	Shift+F8	Display Field Information	Ctrl+Shift+O
Position in Toolbar	Shift+F9	Display Form Wizard	Ctrl+Shift+W
Open New Window	Ctrl+N	Position Focus in Detail	Ctrl+Shift+PageUp
Display Home Page	Ctrl+Home	Position Focus in Detail Tab Region	Ctrl+Shift+PageDn
Show Context Menu	Shift+F10	Scroll Next Field Value	Down Arrow
Toggle status bar	Ctrl+Shift+S	Scroll Previous Field Value	Up Arrow
Open a new tab	Ctrl+Alt+T	Move to Next Row	Shift+Down Arrow
Close the current tab	Ctrl+Alt+W	Move to Previous Row	Shift+Up Arrow
Cycle through the open tabs	Alt+Q	Perform Release	Ctrl+Alt+R

Infor Lawson ERP Jobs and Reports			
Action	HotKey	Action	HotKey
Form Transfer	F8	Completed Jobs	Shift+C
Active Jobs	Shift+A	Print Files	Shift+P
Waiting Jobs	Shift+W		

## HRIS Reporting

HRIS provides users with numerous types of standard reports and reporting tools to extract information out of the HRIS system. The various reports include:

- HR Writer Reports – this product allows agencies to create ad-hoc reports from HRIS database information. Users must attend special training to gain access to the HR Writer Tool.
- HRIS Standard Reports – these reports also vary based on the HRIS Job Role assigned to the user. Standard reports come in various types:
  - Listings of data – these reports provide a list of information based on the report. For example, the Supervisor listing would provide a list of all Supervisor Codes.
  - Update report – this report is typically run before processing an update action on the HRIS database. For example, a retroactive pay creates a report of what it will change; the user can then review this report before updating the Employee's information.

After accessing a Standard Report Form, the user defines the report parameters (selection criteria), enters the appropriate information in the fields and submits the report to be processed (run). The report parameters determine what information the report displays. After the report is processed, results can be viewed online or printed in several formats. The report parameters can be saved and run over and over again.

Users can find more information about Reports training on the HRIS website. ]