Exercises—Basics

Use Firefox browser and enter the URL https://qual.its.utexas.edu/hrms

Exercise 1: Left Navigation

1a: Find your DEFINE inbox
   1. In the left navigation click the inbox link.
   2. View results – since we are in the QUAL test environment, this is your QUAL DEFINE inbox.
   3. Click the back button in the browser window to return to HRMS.

1b: Locate and navigate online Help
   1. Click the link to HRMS Help.
   2. View Help Index.
   3. Click View all Contents.
   4. Click the Resources link at the bottom of the index.
   5. View resources available.
   6. Close the Help window.

1c: View your HRMS Roles
   1. Click the My HRMS Roles link.
   2. View your DEFINE desks and views in HRMS.

1d: Rate Calculators
   1. Click Allocation Calculator.
   2. Scroll down to view Instructions for using the calculator.
   3. Click Annual Rate Calculator.
   4. View Instructions for using the calculator.

1e: Other Resources
   2. View the HRS Web site.
   3. Click the Back button in your browser window.
   4. Click Account Balances.
   5. View the Web site with links to helpful online reporting tools.
   6. Click the Back button.
   7. Click Job Code System.
   9. Click the Back button.
   10. Click Job Search.
   11. View the campus Job Search Web site.
   12. Click the Back button.

Exercise 2: Home Page

2a: View your last 10 HRMS documents
   1. Click View my last 10 documents.
   2. On the resulting list, note that you can navigate to the document by clicking the link to the document ID.

2b: View the last 10 HRMS documents created in a unit
   1. In the text box, enter your unit code, or use the lookup tool to find the unit code if needed.
   2. Click Go.
   3. On the resulting list, note that you can navigate to the document by clicking the link to the document ID.
Exercises—Basics

Exercise 3: Quick Search

3a: Search by Unit Code
1. In the quick search at top right-hand corner of the page, enter your unit code.
2. Using the drop-down menu, select unit code.
3. Click Search.
4. View results.

3b: Search by EID
1. In the quick search at top right-hand corner of the page, enter your EID.
2. Using the drop-down menu, select EID.
3. Click Search.
4. Click your Position ID to continue.

Exercise 4: Position Views/Straight Updates

4a: Browse Positions/Position Details
1. View your Position Details page.
2. Under the section called General Information, click edit.
3. In the Position Title field, enter Amazing Worker.
4. Click Save and view changes.
5. Under the section called Location Details, click edit.
6. Enter or change the phone number and save.

4b: Incumbent View
1. There are two ways to access the Incumbent View:
   a. Click the Incumbent tab in the second-level navigation, or
   b. Under the section called Position Information, click the Incumbent’s (your) EID.
2. Note the navigation tabs - you are now on the Incumbent page.
3. Under the section called Location Information, click edit.
4. Change Residency State to LA and save.
5. View success message.

4c: Funding View
1. Click the Funding tab.
2. View funding for your position.
3. Can any straight updates be made on this view? ____________

4d: History View
1. Click the History tab.
Exercises—Basics

Exercise 5: Employee tab

5a: View employee profile, history and authorizations
1. Click the Employee tab.
2. On the History tab, enter your EID.
3. Enter the fiscal year you began work at the university.
4. Click Go.
5. Default view is appointment history, similar to AL1 screen in DEFINE.
6. Click Assignment History.
7. This view is your assignment history in HRMS.
8. Click the Profile tab.
9. View your employee profile.
10. Click the Authorizations tab to view your authorizations.

Exercise 6: Recruiting tab

6a: Search recruiting efforts (optional – user must have JZ8 authorization)
1. Note searching options – by posting number or document ID.
2. Enter unit code in the second text field.
3. On the resulting list, note links to the Recruiting Summary, Job Title and Posting Number.

Exercise 7: Search tab

7a: Search Positions
1. Click the Search tab.
2. Enter 9020 in the text box.
3. Click Advanced Options.
5. Under Departments enter your unit code. Use the lookup tool to find your unit code if needed.
6. Click Search.
7. View results.

7b: Search Documents
1. In the second level navigation, click the Documents tab.
2. In Option 1, enter your EID and click Go.
3. View results.
4. (Optional) In Option 2, use the calendar icons to enter a date range and click Go.
5. View results.
6. (Optional) In Option 3, enter a posting ID and click Go.
7. View results.
8. (Optional) In Option 4, enter a position ID to find documents related to that position. Click Go.
9. View results.
10. (Optional) In Option 5, enter a unit code to find documents for that unit code. Date range is optional. Click Go.
11. View results.
Optional Scenarios

1. You want to see the balance of an account. Where can you get that information?

2. You want to see employee history for someone in your unit. How would you go about doing this?

3. You created a document last week, but can’t remember the document ID. How can you find it?

4. You need to change the office location and direct reports to for an employee. How would you accomplish this?

5. You want to see funding for your position. How will you find that information?

6. You want a listing of all student assistant positions (Job Code 0074) in your unit. How would you get that list?

7. You want a listing of just the JZ8 documents you have created. How would you get that list?

8. You want to see a list of all the vacant positions in your unit. How would you find that information?

9. You need a listing of all employees who report to you, along with their position data. How will you get that list?