HRIS Job Role Training

HRIS Navigational Tutorial
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Introduction

The Human Resource Information Solution (HRIS) System introduces a number of new concepts to the State of Arizona HR/PR/BN 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.

Notes

- 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. The lesson also provides a self-scoring knowledge checkpoint.

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 Administrator.

![Login Screen for YES/HRIS PORTAL](image)

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/hris](http://www.hr.az.gov/hris) and click on the HRIS Portal link. The user will then be prompted with the screen above. The user will input his/her User ID and Password. For assistance setting up a password, please access the HRIS First Time Password Setup Document or Password Reset Document, these documents are available on the HRIS website under the HRIS Security section.
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 stop in gaining access to the HRIS Application Forms required when completing HR, 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 no 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 left corner below the State of Arizona logo. 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). To determine the needed form, HRIS users should refer to the task based training for his/her job role. 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, and
- Subforms.

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. Users should refer to the HRIS Job Role task training to obtain a better understanding of the requirements for a specific HRIS form.

**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/remove/update.
**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 used by Agency Payroll Initiators to make adjustments to Employee time records. This form contains three key fields: Company, Batch 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.

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.
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.

![Click to view Subform](image-url)
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.
Tabs and Related Links
As mentioned in Portal Concept, each HRIS Form is structured with a left and 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 in the left pane. 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.

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 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 Administrator.
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.

All three links are available from every HRIS form. Users can use these features as necessary to assist in various aspects of the HRIS System.

**Go To Option**

The Go To menu contains four options: Home, Reports, support.Lawson.com and Log Out.

- The Home option allows users to return to the HRIS Homepage (displayed above) from anywhere in the HRIS system.
- The Reports option allows the user quick access to his/her Reports Queue. The Reports queue is where the user will access various report jobs he/she has run.
• The support.lawson.com link is restricted to HRIS Central personnel only. This site does require the user to login to obtain information.
• The Log Out option will log the user out of the HRIS system and close his/her browser window. HRIS recommends using the Log Out feature when a user has completed his/her tasks in the HRIS system.

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 Broadcast Reports would be added. For additional training on Broadcast Reports, see the Broadcast Training. 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.
  o **Users should not change the default Locale or Data Area.**
  o 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.
  o 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).
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.
Hot Keys

Hotkeys are keyboard shortcuts that can be used in replacement of the mouse. These can be used to quickly perform specific operations with keyboard keystrokes.

<table>
<thead>
<tr>
<th>Portal Hotkeys Help</th>
<th>Lawson ERP Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lawson Portal</strong></td>
<td></td>
</tr>
<tr>
<td>Perform Submit Action</td>
<td>F12</td>
</tr>
<tr>
<td>Perform Close/Cancel Action</td>
<td>Esc</td>
</tr>
<tr>
<td>Perform Refresh Action</td>
<td>Ctrl+Shift+F5</td>
</tr>
<tr>
<td>Perform Delete Action</td>
<td>Ctrl+Shift+D</td>
</tr>
<tr>
<td>Perform Next Action</td>
<td>Ctrl+Shift+N</td>
</tr>
<tr>
<td>Perform Previous Action</td>
<td>Ctrl+Shift+P</td>
</tr>
<tr>
<td>Perform Page Up Action</td>
<td>PageUp</td>
</tr>
<tr>
<td>Perform Page Down Action</td>
<td>PageDn</td>
</tr>
<tr>
<td>Tab Page Up</td>
<td>Ctrl+PageUp</td>
</tr>
<tr>
<td>Tab Page Down</td>
<td>Ctrl+PageDn</td>
</tr>
<tr>
<td>Position in First Field</td>
<td>Ctrl+Alt+F</td>
</tr>
<tr>
<td>Display Field Help</td>
<td>Ctrl+Shift+H</td>
</tr>
<tr>
<td>Display Form Help</td>
<td>Shift+F1</td>
</tr>
<tr>
<td>Toggle Hotkeys Help</td>
<td>Alt+K</td>
</tr>
<tr>
<td>Toggle Navigation Panel</td>
<td>Ctrl+Shift+F7</td>
</tr>
<tr>
<td>Position in Navigation Bar</td>
<td>Shift+F7</td>
</tr>
<tr>
<td>Position in Search Box</td>
<td>Shift+F8</td>
</tr>
<tr>
<td>Position in Toolbar</td>
<td>Shift+F9</td>
</tr>
<tr>
<td>Open New Window</td>
<td>Ctrl+N</td>
</tr>
<tr>
<td>Display Home Page</td>
<td>Ctrl+Home</td>
</tr>
<tr>
<td>Show Context Menu</td>
<td>Shift+F10</td>
</tr>
<tr>
<td><strong>Lawson ERP Jobs and Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Active Jobs</td>
<td>Shift+A</td>
</tr>
<tr>
<td>Waiting jobs</td>
<td>Shift+W</td>
</tr>
<tr>
<td>Completed Jobs</td>
<td>Shift+C</td>
</tr>
<tr>
<td>Print Files</td>
<td>Shift+P</td>
</tr>
</tbody>
</table>

Open/Select Field Context | Enter |
Move to Action Selection | F9 |
Perform Add Transaction | Ctrl+Shift+A |
Perform Change Transaction | Ctrl+Shift+C |
Perform Inquire Transaction | Ctrl+Shift+I |
Clear To End of Form | Ctrl+Shift+K |
Clear Entire Form | Ctrl+Shift+X |
Clear Current Field | Ctrl+Shift+Y |
Open Define Screen | Ctrl+Shift+F |
Open Attachments Screen | Ctrl+Shift+T |
Open Drill Screen | Ctrl+Shift+R |
Copy Detail Field | Shift+F2 |
Copy Detail Field Inverse | Ctrl+Shift+F2 |
Display Field Information | Ctrl+Shift+O |
Display Form Wizard | Ctrl+Shift+W |
Position Focus in Detail | Ctrl+Shift+PageUp |
Position Focus in Detail Tab Region | Ctrl+Shift+PageDn |
Scroll Next Field Value | Down Arrow |
Scroll Previous Field Value | Up Arrow |
Move to Next Row | Shift+Down Arrow |
Move to Previous Row | Shift-Up Arrow |

Users are encouraged to checkout the Help section and try these options to see what benefits they can provide.
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:

- **Control-D/Web Reports** – agencies must request special access to these reports. Users will gain access to specific reports based on their HRIS Job Role. These reports are discussed in more detail in the Control-D/Web Reports Training.
- **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.