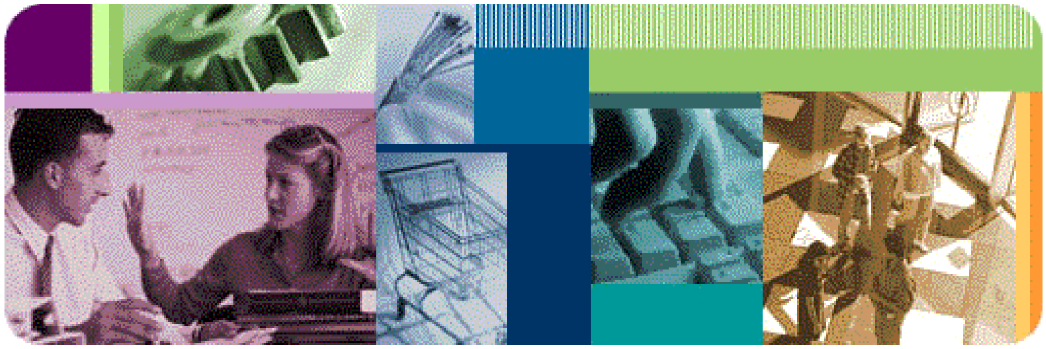


Defense Civilian Personnel Data System

11i Training Guide

(Edited for Air Force Use Only)

May 2003

Defense Civilian Personnel Management Service
Regionalization and Systems Modernization Division

DCPDS
(Web-Based Version – Oracle 11i)
Quick Start Guide

Table of Contents

Overview

Introduction

This guide explains the initial steps to navigate Oracle 11i, the web-based version of DCPDS. New features in 11i include:

- Required fields are highlighted.
- List of Values (LOVs) are embedded with the data fields.
- Date format allows for free form entry, which is automatically converted to the correct system format.
- Tabs have replaced many flexfields.
- A **Person Summary** for viewing all the employee data.
- A **Position History** for viewing changes to the position record.
- Less down time – no client loads for patches.

See Also

Modern DCPDS User Guide posted on the DoD CPMS Home Page for specific processing details.

Before You Begin

- Current 10.7 User name/Password may be used to access 11i.
- If user is new submit request to obtain a User Name.
- Set up your secure password.
- Ensure you are: Assigned the Workflow Inbox responsibility to view your inbox.

System Maintenance

- Down time every other Sunday for Updates.
- No client loads for DPCPDS patches.
- Because Oracle 11i is web-based, files are added to your temporary internet file folder. You should periodically purge this folder. Use the following steps:

Step	Action
1	In the Internet Browser, click **Tools/Internet Options** on the Main Toolbar. The **Internet Options** Window displays. In the middle Region, “Temporary Internet Files,” states: “Pages you view on the internet are stored in a special folder for quick viewing later.”
2	Click <**Delete Files**.> The **Delete Files** Window Displays.
3	Click <OK>.

System Changes/New Features

Purpose

This section explains some of the system changes and new features in 11i and the action required to use them.

System Changes/ Description/ Function

<table>
<tr><th>System Changes</th><th>Description/Function</th></tr>
<tr><td>Switch Responsibility</td><td>Replaced with a new icon on the toolbar (a derby hat).
</td></tr>
<tr><td>System Times Out</td><td>Leave the Oracle picture on the screen, right click on the mouse and click “Refresh” on the menu. Saves logging on again.</td></tr>
<tr><td>Function Key s F7 & F8 are now F11 + CTRL F11</td><td>For Query:
Place the cursor in the first blank data field.
Press F11 and then Ctrl and F11 simultaneously.</td></tr>
<tr><td>List of Values (LOVs)</td><td>Are located within most windows.</td></tr>
<tr><td>Wild Cards</td><td>Wildcards are software tools that enable you to define a range of values that begin with, end with, and/or include specific letters, numbers, words, or phrases .i.e.
You may want to conduct a query of all the employees whose last name starts with the letter L.
You may forget how to spell an employee’s name and want to look up all of the employees whose last name ends in the letters th.
You may want to look up all of the employees that have a birth date in the month of April.
The wildcard symbol in Oracle is the percent symbol on your keyboard (%). Wildcards can be used in any field that Oracle permits you to access while in the query mode.</td></tr>
<tr><td>Data fields</td><td>Color denotes functionality:<table><tr><th>Color</th><th>Types of Data Fields</th></tr><tr><td>Blue</td><td>Query</td></tr><tr><td>Yellow</td><td>Required</td></tr><tr><td>White</td><td>Optional
(Doesn’t mean you do not need to use)</td></tr><tr><td>Gray</td><td>Cannot be entered</td></tr></table></td></tr>
</table>

Continued on next page

System Changes/New Features, Continued

Function (continued)

System Changes	Description/Function
If you cancel a realignment:	The employee goes back to previous position.
New **HR Manager** Navigator Menu Items:	**Career Management**: (Rating Scales, Competencies, Competence Types, Competence requirements, Schools & Colleges, Qualification Types, Assessment Template, and Appraisal Template.)
Record Types	**Employee – Ex Applicant**: Someone appointed and hired in DCPDS. **Employee:** Someone who was converted from Legacy or moved from one region to another (Mod to Mod).
Tabs	Replaced alternate regions
Position has enhanced Date Tracking	You can view all the history of changes that have occurred on a position.
RPA, Salary Change, **Awards** and **Mass Awards**	System calculates percentages.

Logging On

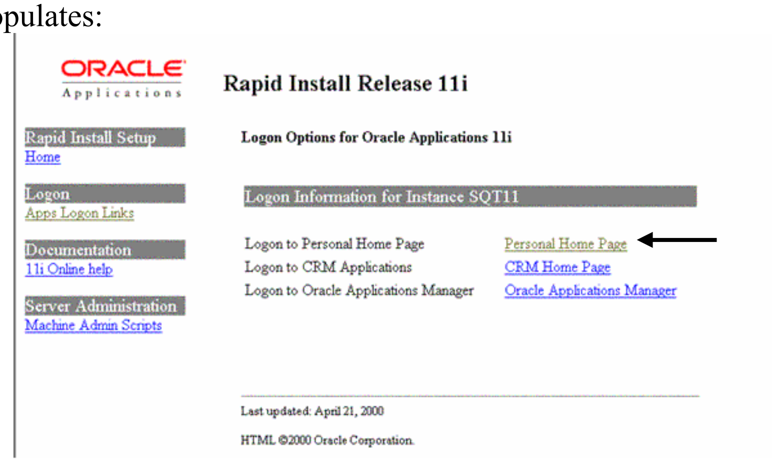
Purpose

This section shows you how to log on to Oracle 11i.

Logging On

Follow these steps to log on:
Note: Should not see the next two screens but if you do - Request assistance from you PSM to set up correctly.

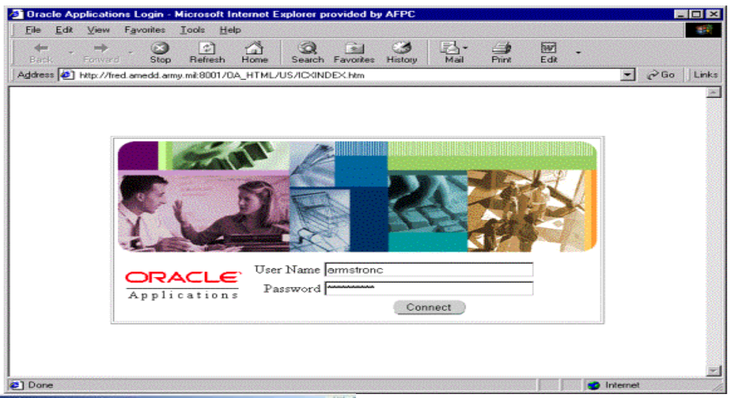
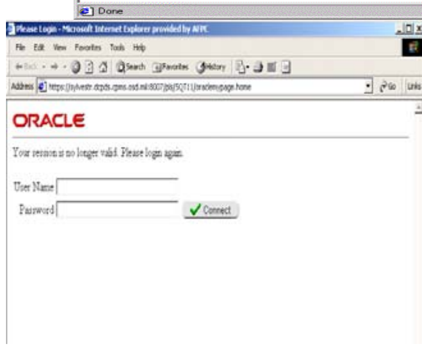
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on the Oracle 11i Icon on your desktop. The Oracle Rapid Install Release 11i Web Page displays:

</td></tr>
<tr><td>2</td><td>Click <<u>Apps Logon Links</u>>. The right side of the window populates:

</td></tr>
</table>

Continued on next page

Logging On, Continued

Logging On
(continued)

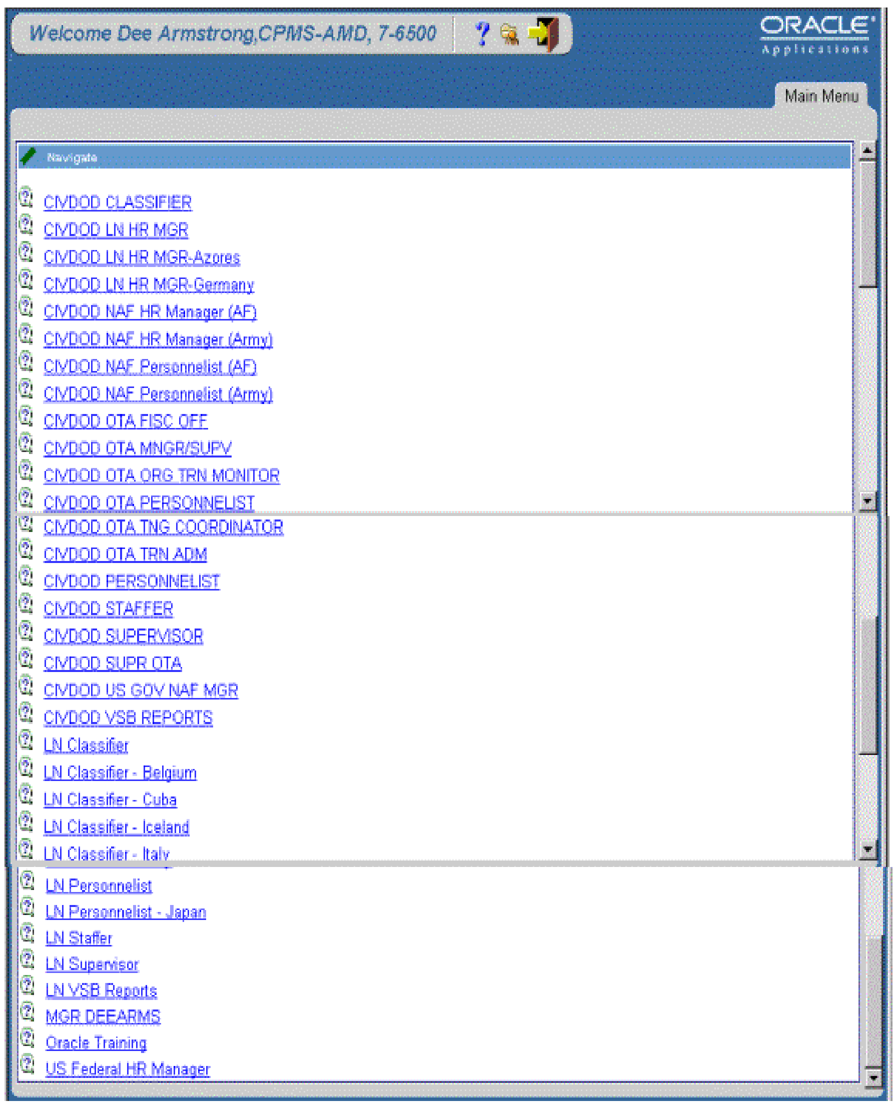
Step	Action
3	Click <**<u>Personal Home Page</u>**>. The **Oracle Application Login** Window displays: **<u>Important Note</u>**: Depending on the set up of your account you will either see one of the following three screens to log in.   
4	Type your assigned User Name in the **User Name** field. **Note:** If you had a current 10.7 user Id/Password it will convert over to 11i
5	In ***Password***, type in “Password.” Click <Connect> (or Enter).
6	• If you have established an 11i Password, disregard this step. • If you have not established an 11i Password, a screen will display which will ask you to type in the old (“Password”) and your own unique password (twice). Click the **<Connect>** button.
7	The **Welcome** Window displays with the roles assigned to you.

Navigating

Purpose This section shows how to navigate through Oracle 11i.

Welcome Window

Step	Action
1	On the **Welcome** Window, select your role and double click. For example: "**CIVDOD PERSONNELIST**."



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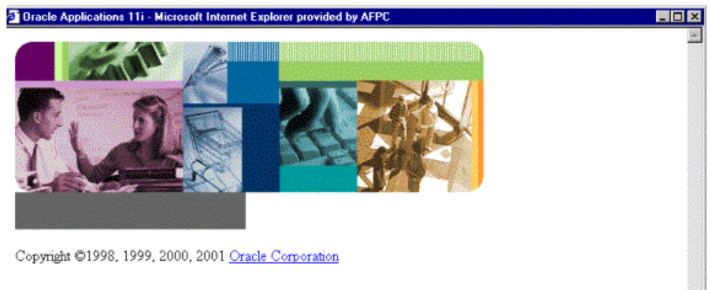
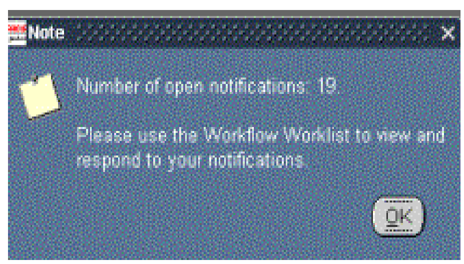
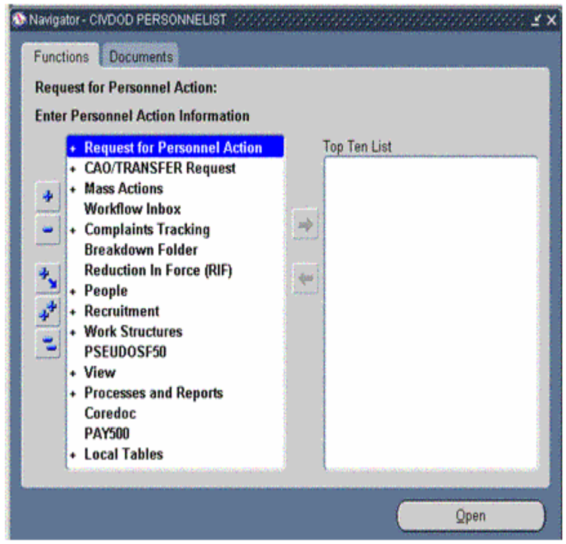
Navigating, Continued

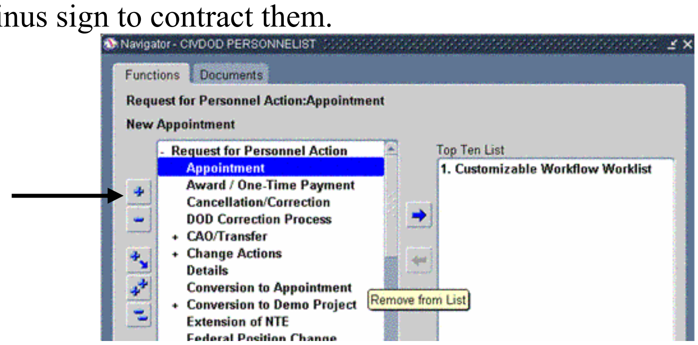
Welcome Window (continued)

Step	Action
2	The **Oracle Application 11i** Window displays as it is connecting, stating: “Loading Java Applet.”  **Note:** The desk top bottom toolbar displays: e Oracle Appl.
3	If you have actions in your inbox, a notification displays:  Refer to the **Workflow Inbox** section in this guide to work these actions after you open the **Navigation** List. Click the <**OK**> button. **Note**: Ignore the hour glass which stays on.

Navigating, Continued

Navigator Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The Navigation window displays two tabs (Functions and Documents). This list of functions is the starting point to process actions, build positions, maintain employee records, run reports, etc.


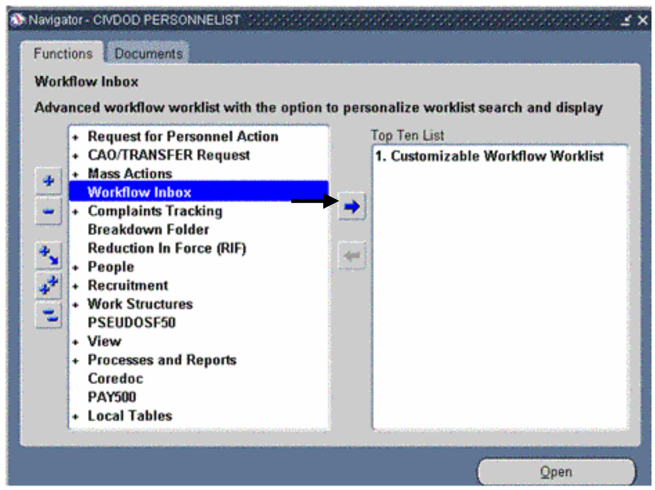
<table>
<tr><th>Part</th><th>Description</th></tr>
<tr><td>Functions Tab</td><td>Displays the Navigation List starting with the RPA, or OTA, etc., Depending on the responsibility/role selected.</td></tr>
<tr><td>Documents Tab</td><td>Not currently used by DoD.</td></tr>
<tr><td>Navigation List</td><td>Displays all the items that may be performed.</td></tr>
</table></td></tr>
<tr><td>2</td><td>You may click on the plus sign to expand the functions and the minus sign to contract them.


Double click on the item to start a process, or click <Open>.</td></tr>
</table>

Continued on next page

Navigating, Continued

Navigator Window
(continued)

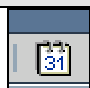
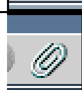
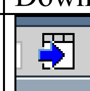
Step	Action
3	To set up a **Top Ten List** of your most frequently performed actions, highlight the item on the list and click the middle arrow key to the right. The item displays under "**Top Ten List**." For example: Highlight **Workflow Inbox** and click the arrow key. The **Top Ten List** populates with **"1. Customizable Workflow Work list."**  To view your inbox in the future, you only need to type a "1" to open the **Work list.** **Note**: To remove from the Top Ten List, highlight item and click the middle arrow pointing to the left (Navigation List).

Toolbar Icons, Functions, and Shortcut Keys

Toolbar Icons Slide cursor over the Icon on the toolbar to display the function:

New Record, Find, Return to Navigator, Save, Next Step, Print, Close Folder, Cut, Copy, Paste, Clear Record, Delete, Edit, Attachments, Folder Tools, Alter Effective Date, Date Track, Export Data, Help

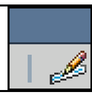
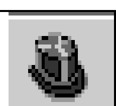
Functions, Shortcut Keys, and Icons in Alphabetical Order

Functions	Shortcut Keys/ Icons		Functions	Shortcut Keys/ Icons
Alter Effective Date (calendar)			Find (flashlight)	
Attachments (paper clip)			Folder Tools	
Block Menu	Ctrl+B		List of Values	Ctrl+L
Clear Block	F7		List Tab Pages	F2
Clear Field	F5		Next Block	Shift+PageDown
Clear Form	F8		Next Field	Tab
Clear Record	F6		Next Primary Key	Shift+F7
Commit/Save	Ctrl+S		Next Record	Down
Clear Record (Pencil eraser)			Export Data (document w/blue arrow)	
Count Query	F12		List of Values	Ctrl+L
Copy (documents)			List Tab Pages	F2
Close Form (yellow folder w/blue arrow)			New (green plus)	
Cut (scissors)			Next Step (arrows on document)	
Date Track History			Next Set of Records	Shift +F8
Delete Record	Ctrl+Up		Previous Block	Shift+PageUp

Continued on next page

Toolbar Icons, Functions, and Shortcut Keys, Continued

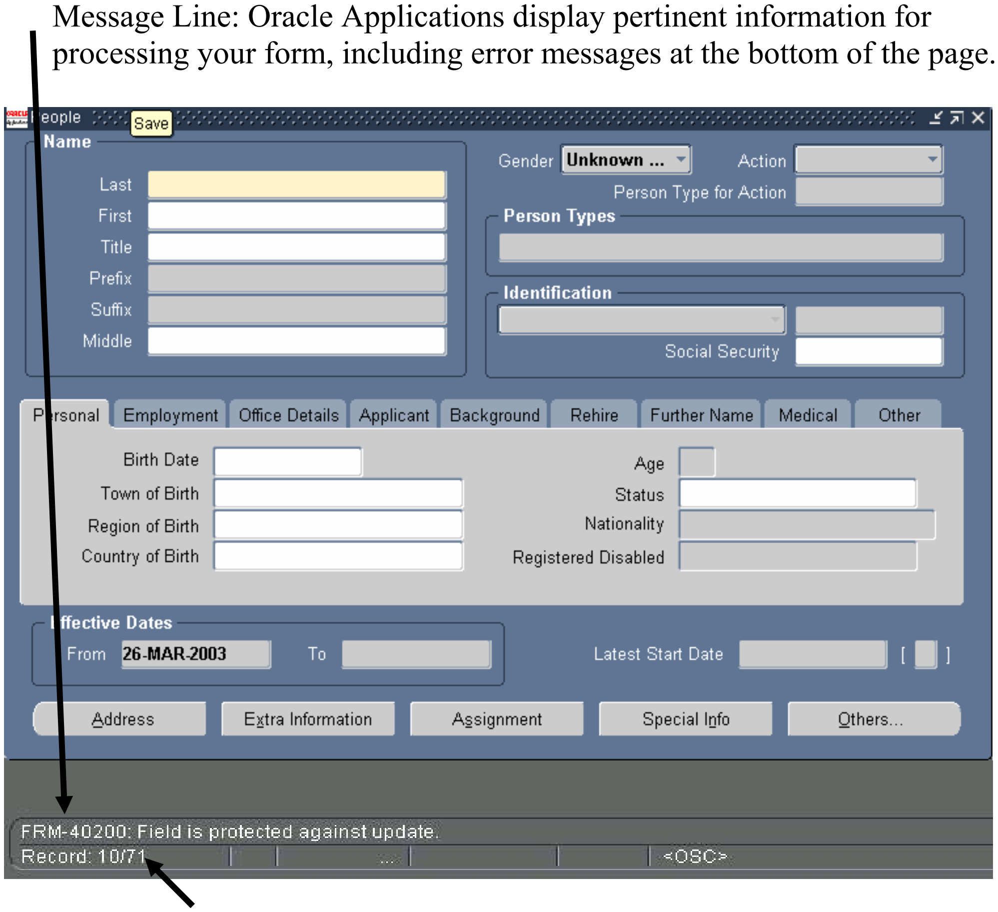
Functions, Shortcut Keys, and Icons in Alphabetical Order (continued)

Function	Shortcut/ Icon	Function	Shortcut/Icon
Delete (Red X)		Previous Field	Shift+Tab
Display Error	Shift+Ctrl+E	Previous Record	Up
Down	Down	Print	Ctrl+P
Duplicate Field	Shift+F5	Print (printer)	
Duplicate Record	Shift+F6	Return	Return
Edit (pencil)		Save (yellow disc)	
Edit	Ctrl+E	Show Navigator- returns to Menu	
Enter Query	**F11** (Press twice to display last query)	Help	Ctrl+H
Execute Query	**Ctrl+F11** (Use for blind queries to retrieve all records)	Insert Record	Ctrl+Down
Exit	F4	Translations	Not used
Paste		More Information Available	< >
Window Help (blue question mark)		Zoom	Not used
Switch Responsibility			

Other Functions of the Oracle Applications Window

Window Functions

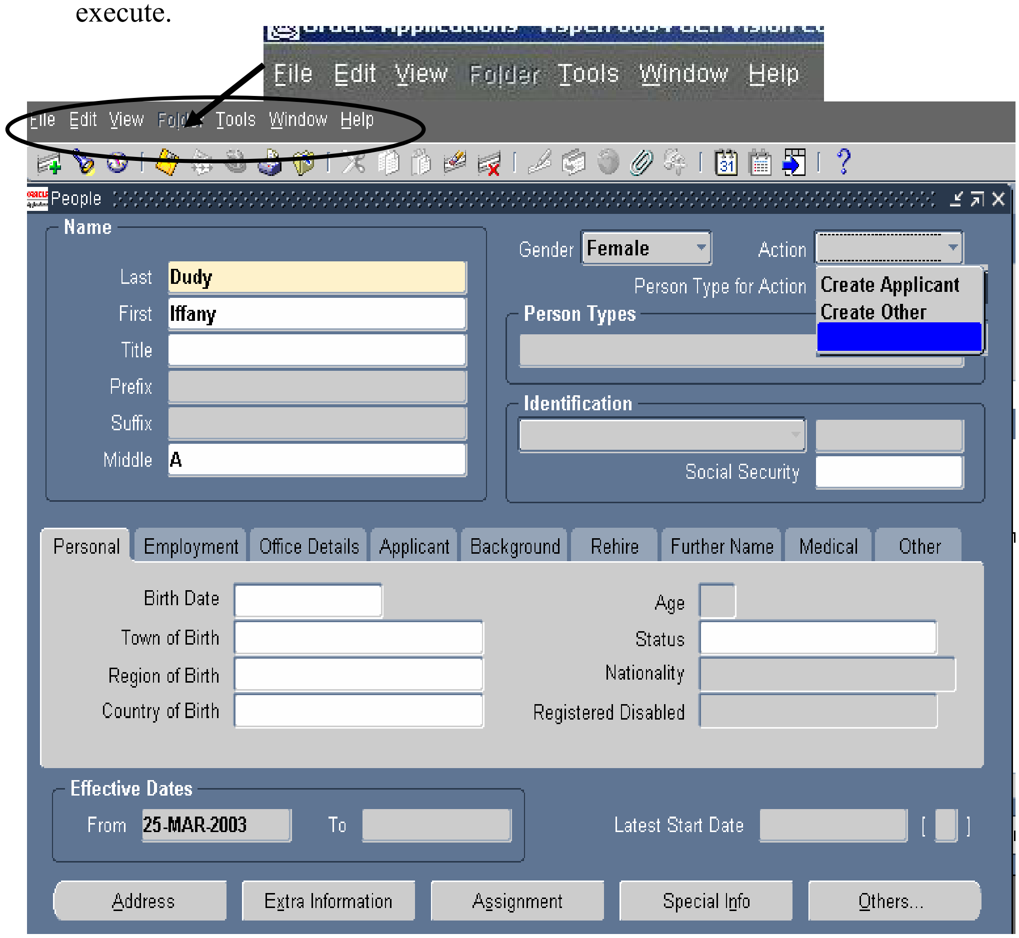
Message Line: Oracle Applications display pertinent information for processing your form, including error messages at the bottom of the page.



Record Indicator: Display the information about how many records are retrieved in your query and which record is currently opened. For example, in the above screen you are in the 10th record of a total of 71 records.

Menu Bar

There is a series of pull-down menus at the top of the window. You can operate the pull-down menu using either keyboard shortcuts or the mouse. On the keyboard, use the Alt key to drop down the menu (e.g. Alt + Q for the Query Menu), the Down Arrow to move to the option required, and then Enter to execute.



Other Functions of the Oracle Applications Window, Continued

Menu Options

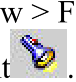
File	Edit	View	Folder	Tools	Window	Help
New	Undo Typing	Show Navigator	New	Options change depending on the application and form in use.	Cascade	Window Help
Open	Cut	Zoom	Open		Tile Horizontally	Oracle Applications Library
Save	Copy	Find	Save		Tile Vertically	Keyboard Help
Save and Proceed	Paste	Find All	Save As		List of Open Windows	Diagnostics
Next Step	Duplicate	Query by Example	Delete			Record History
Export	Clear	Record	Show Field			About Oracle Applications
Place on Navigator	Delete	Translations	Hide Field			
Log on as a Different User	Select All	Attachments	Move Right			
Switch Responsibility	Deselect All	Summary/Detail	Move Left			
Print	Edit Field	Requests	Move Up			
Close Form	Preferences		Move Down			
Exit Oracle Applications			Widen Field			
			Shrink Field			
			Change Prompt			
			Autosize All			
			Sort Data			
			View Query			
			Reset Query			

Retrieving Data (Queries)

Query

A query is a request to "pull up" certain sets of records in a database. In Oracle, you can define and run a query based on the parameters of any field that you are able to navigate to and access in the various Oracle Applications forms. In general, you do this by putting Oracle in query mode and then entering specific information into one or more of the input field(s). The information that you enter tells Oracle the type and the range of information that you want it to search for and retrieve from the database. There are two ways to create queries:

The Find Mode

Step	Action
1	Select View > Find from the pull-down menu or select the Find icon with a flashlight . The Find form will change appearance depending on the application and base form you are working with. Each Find form has fields relevant to your search.
2	Enter you search criteria in the appropriate fields. You can use the wildcard (%) character in the search phrase.
3	Click Find to find any matching records.

The Query Mode

Step	Action
1	Select View > Query by Example > Enter from the pull-down menu or press F11.  The **ENTER QUERY** message will appear in the status bar in the bottom left corner of the screen.
2	Enter search criteria in any of the fields, using wildcard and query operators. You can also select Show Last Criteria to display the search criteria in your last search.
3	Select View > Query by Example > Run or press Ctrl + F11 to perform the search.

Retrieving Data, Continued

Query Operators

Operators	Meaning	Example
=	Equal to	= 'Steve' or = 107
!=	Not Equal to	!= 'Steve' or != 107
>	Greater than	>99.1 or > 'Steve'
>=	Greater than or equal to	>= 55
<	Less than	<1000.00
<=	Less than or equal to	<= 100
#BETWEEN	Between two values	#BETWEEN1and 100

Query by Example

Step	Action
1	Navigate to the form in which you would like to conduct your count.
2	Select View > Query by Example > Enter from the menu bar, or press F11, to put Oracle in query mode.
3	The Enter a Query message will appear in the status bar in the lower left corner of the screen. **NOTE**: You must complete this step (put Oracle in query mode) before you can define any search criteria for your count.
4	Navigate to the field(s) where you wish to define search criteria for your query. Enter complete or partial values in these fields, to define the type of records that you wish to count. **NOTE**: In the above step, "partial" refers only to sets of values defined by wildcards, as described in the Wildcards section of this document. If you enter a partial value without a wildcard, Oracle will not give you an accurate count for the data set that you are requesting.

Continued on next page

Retrieving Data, Continued

Query by Example
(Continued)

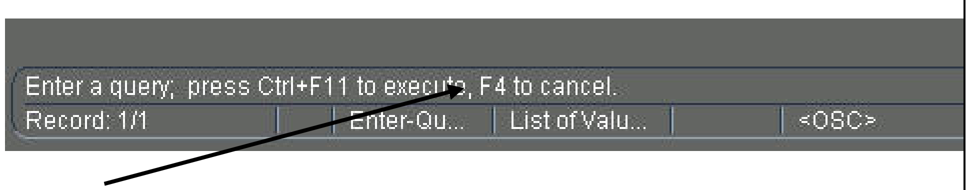
Step	Action
5	Choose Count Matching Records from the View > Query by Example menu on the menu bar. A message will appear on the status bar, informing you of the number of records that would be retrieved if you ran the query at this point. Once you see the number of records, you can do one of the following: • Run the query by selecting **View > Query by Example > Run** from the menu bar or press Ctrl + F11. • If you only need to know the actual number of records or you do not wish to run the query at this time, take Oracle out of query mode by pressing **F4** on your keyboard or by selecting **View > Query by Example > Cancel** from the menu bar

Exiting out of Query mode

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Once you run a query (**View > Query by Example > Run)** and Oracle retrieves the records that you have requested, it will exit out of query mode automatically.

- If you enter a query and you wish to cancel it before it runs, take Oracle out of query mode by pressing **F4** on your keyboard or by selecting **View > Query by Example > Cancel** from the menu bar. Oracle will return to its normal (input) mode.



The **CANCEL QUERY** reminder will appear in the status bar in the bottom left corner of the screen

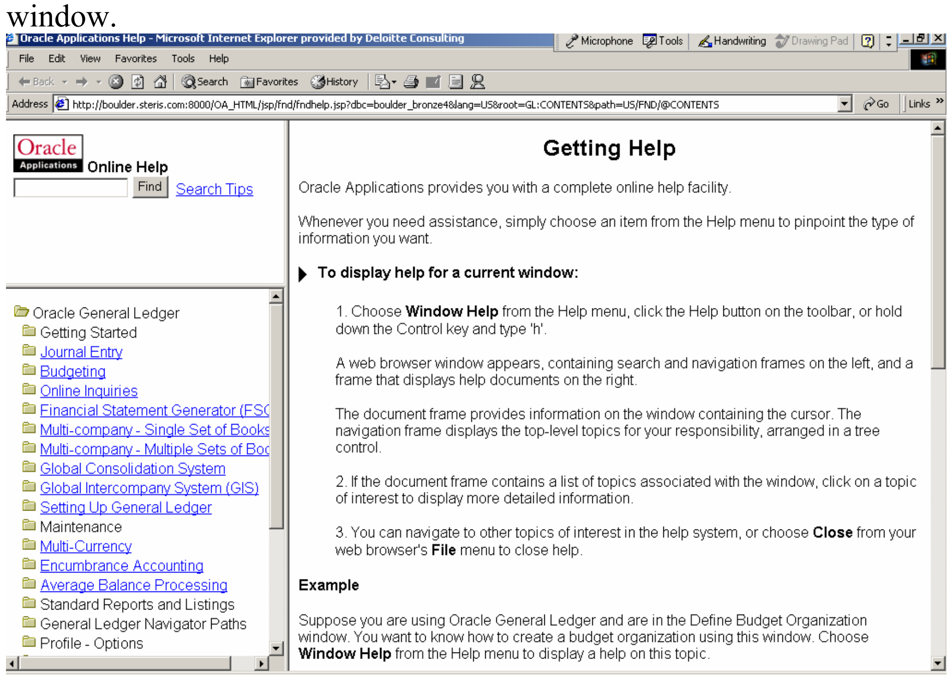
</td></tr>
</table>

Accessing On Line Help

On Line Help

The Online Documentation and Help features can greatly enhance your ability to understand how to accomplish tasks using Oracle Applications. You can also determine how to identify the user responsible for the entry or maintenance of the record for further clarification of a business issue.

Help Menu

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select Help > Window Help > Oracle Applications Library. A Help window is displayed through your web browser tool, providing information and a list of topics associated with the current application window.


The Glossary provides help information by topic, alphabetically. The information contained in the Glossary is primarily a brief description of each topic.
Navigation Help provides information of the navigation paths to forms within each Oracle application.
The Library icon gives you access to online Help for any Oracle Application products and complete reference and documentation of the products
</td></tr>
</table>

Folders Tools

Folders

Folder Tools are available in the Personnelists and Federal HR Manger roles.

A Folder is a special block in which the field and record layout can be customized. A folder block lets you satisfy the following basic customization needs:

- Display only those fields that are of interest to you.
- Instantly modify the width, sequence, and prompts of the fields you want to display.
- Display a subset of records based on your specific criteria.
- Display records in a specific order.
- Save your folder customizations for later use.
- Automatically query for a subset of records each time you open a specific folder.
- Keep your folder customizations private or make them public for others to access.
- Make your customizations the default layout for a folder block.

Folder Tools

When you navigate to a folder block, the **Folder Tools** button gets enabled on the toolbar. Choose this button to display the folder tools palette on your screen.

The folder tools include the following buttons that replicate the actions of some commonly used Folder menu items:

Buttons	Function
Open Folder	Open another folder.
Save Folder	Save the current folder.
Create New Folder	Create a new folder
Delete Folder	Delete an existing folder
Widen Field	Increase the width of a field
Shrink Field	Decrease the width of a field
Show Field	Show a currently un displayed field

Continued on next page

Folders Tools, Continued

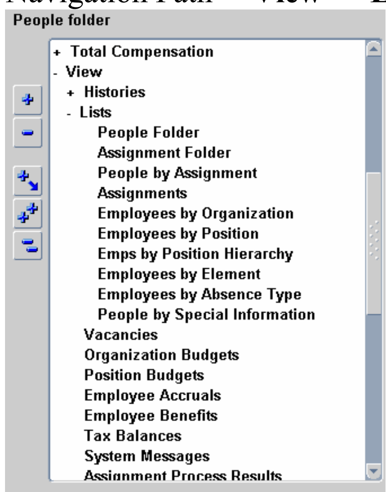
Folder Tools
(continued)

Buttons	Function
Hide Field	Hide a currently displayed field.
Move Left	Swap the current field with the field to its left in a multi–record block. In a single–record block, move the current field one character width to the left
Move Right	Swap the current field with the field to its right in a multi–record block. In a single–record block, move the current field one character width to the right
Move Up	Move the current field up by one character height for a single–record display
Move Down	Move the current field down by one character height for a single–record display

Creating a Folder

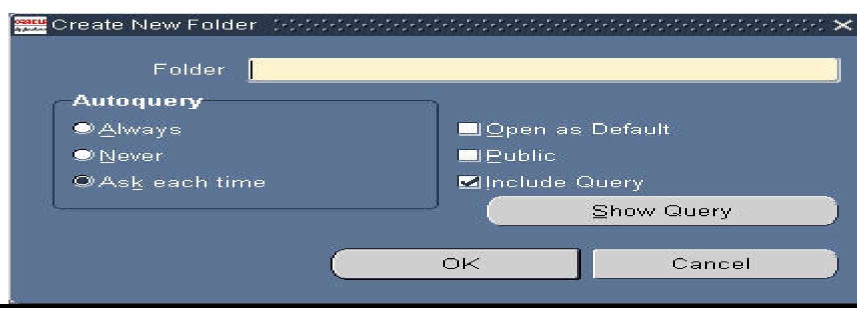
Folder Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation Path →View → List →People Folder



NOTE: Any window listed under the View, List navigation is a folder window and the following procedures work the same for all</td></tr>
<tr><td>2</td><td>Select Folder > New. You will see a Create New Folder window.

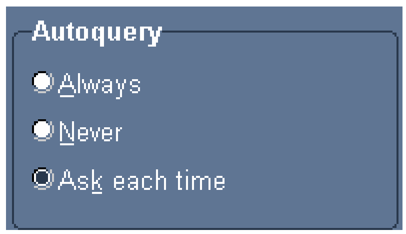

</td></tr>
<tr><td>3</td><td>The create New Folder window opens: Enter a new and unique folder name.


</td></tr>
</table>

Continued on next page

Creating a Folder

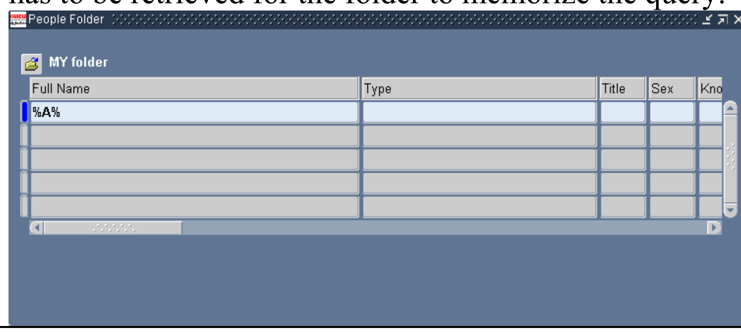
Folder Window

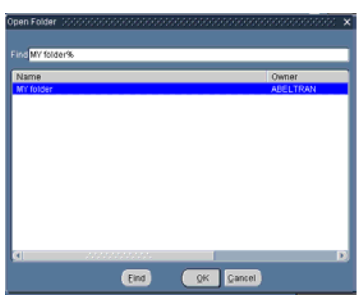
Step	Action
4	Select the Auto query option you require.  **NOTE**: You must be very careful in assigning the Autoquery option. The basic rule is that the folder should behave the same as the standard screen. If, when you enter the standard screen, data is automatically displayed, set the autoquery option to “Always”; if it is not, set the option to “Never.”
5	Check Open as Default if you want this folder definition to open as your default every time you invoke the form. 
6	Check Public if you want other users to have access to this folder. 
7	Click the **<OK>** button when you are finished

Creating a Folder, Continued

Defining Folder Query Criteria

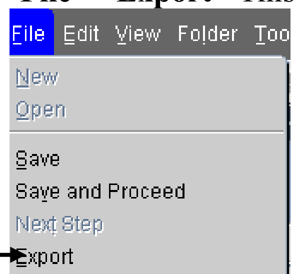
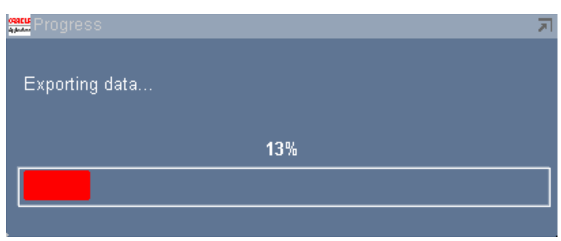
One advantage of a folder is that you can customize it to display only the records you want to see. You can easily define and alter the query criteria for any folder and save those criteria in a folder definition

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Run the query by Pressing the F11 key, Enter the Search Criteria and press both the F11 and the CTRL buttons. At least one record has to be retrieved for the folder to memorize the query.

</td></tr>
<tr><td>2</td><td>After the query has completed click Folder > Save. This query is saved in a folder definition

</td></tr>
<tr><td>3</td><td>Verify this folder has been saved with the parameters you have selected. Click <Folder> <Open>. The open folder window will appear with the Name of the folder and creator.

</td></tr>
<tr><td>4</td><td>You can query your folder in this window with the specific parameters given. And if you choose you can reset the query criteria by selecting Folder > Reset Query</td></tr>
</table>

Exporting Data

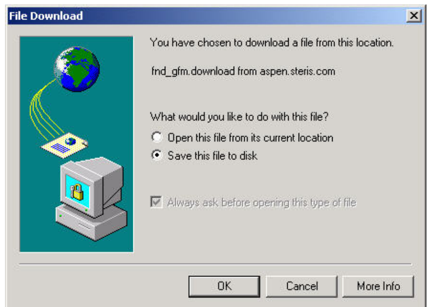
Exporting Data You can export Data from any of your Views (Folder windows)

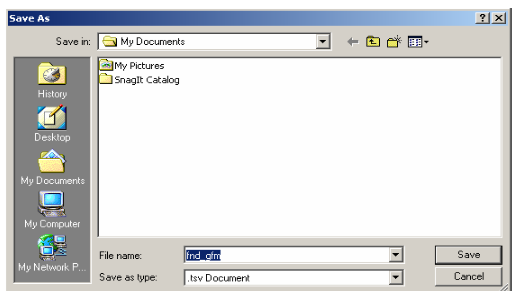
Step	Action
1	While in the Folder window you have completed the query, arranged the columns to your needs. From the main menu Click **<File> <Export>** This will be the data you want to export. 
2	If there are several hundred records to be retrieved a Decision box will appear click the **<Continue>** button.  NOTE: This will occur after every 100 records retrieved, to avoid having to click the continue button several time, Click the <**Continue to End**> button to expedite query.
3	A Progress box will appear showing the percentage of data being exported. 

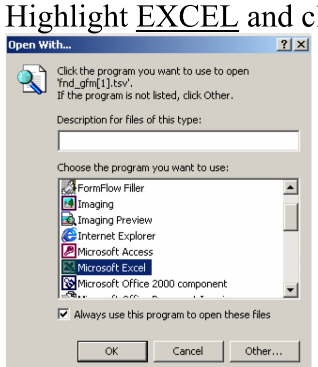
Exporting Data, Continued

Exporting Data (Continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>After the export is complete a File Download window will open. You have a choice of Save the File to disk or Open this file from the current location. Click the <OK> button.


</td></tr>
<tr><td>5</td><td>Save this file to disk will – Allows you to save file to a particular format for viewing at a later point.


</td></tr>
<tr><td>6</td><td>When opening the file the Program window will appear: Highlight <u>EXCEL</u> and click the<OK> button.

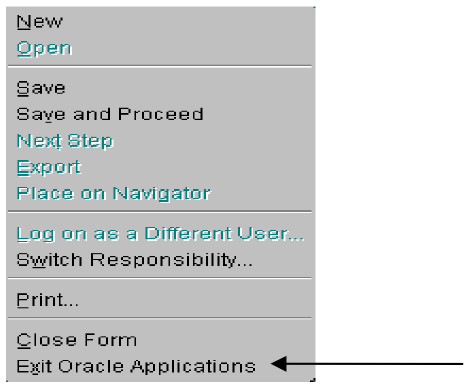
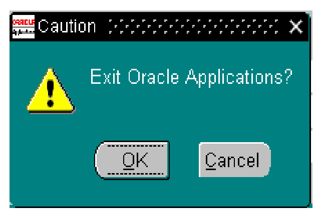


The data you exported will now be imported to an excel spreadsheet save the file with a .XLS file extension to the directory of your choice.

NOTE: The file will download as a text delimited. Change the file type before saving the file to your directory.</td></tr>
</table>

Closing Oracle Applications

Closing Applications

Step	Action
1	Using the menu bar click <FILE> - Exit Oracle Application. 
2	The following caution message will appear – click the<OK> button to exit:  Close all remaining browser windows related to Oracle.

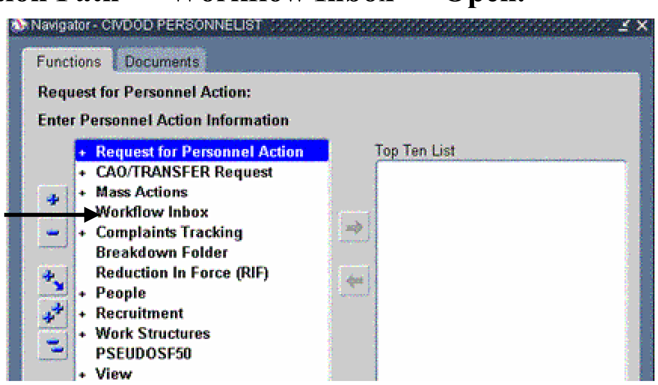
Workflow Inbox

Accessing the Workflow Inbox or Worklist

Your system administrator must add the **Workflow Inbox** to the menu for a responsibility assigned to you before you can access it and view your **Worklist.** It is used to manage your RPAs and Notifications, i.e., HR updates, WGI Notices, etc. For example, a Mass Realignment will display a notice on each employee realigned.

- It lets you choose which notifications to display and what information to display for those notifications.
- In addition to the preconfigured **Worklist** viewing options, you can create personal **Worklist** views by defining a set of filtering criteria to determine what types of notifications and properties to display.
- You can:
  - Perform one-time searches to locate notifications you want to view.
    - Save the search criteria as a personal **Worklist** view to repeat the same search later.
  - Respond to your notifications.
  - Reassign notifications to another user.
  - Request more information about a notification from another user, and define automatic notification routing rules.

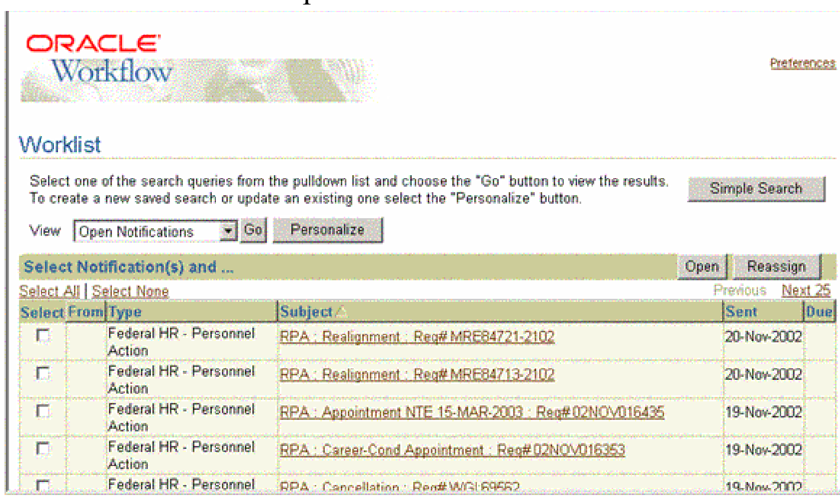
Note: Your System Administrator can turn off notices that may fill up your viewing space in the inbox, such as notices for the manager to approve an RPA; a Personnelist to approve an RPA, and Auto WGI notices.

Step	Action
1	**Navigation Path → Workflow Inbox → Open.** 

Continued on next page

Workflow Inbox, Continued

Accessing the Workflow Inbox or Worklist (continued)

Step	Action
2	The **Worklist** window opens: 

Worklist Window Description

The features associated with this new inbox for viewing and responding to notifications are:

- Simple and advanced searches
- Customized views (Personalize)
- Open and reassign
- Creating routing rules to manage your notifications

Buttons/Links	Function
Logout	To be developed.
Preferences	Displays a General Preference Window – not currently used.
Help	Assists with the window.
View	List of preconfigured views.
Go	Execute the search to review the results.
Personalize	Creates a custom view
Simple Search	Locates a one-time search of notifications that match your criteria

Continued on next page

Workflow Inbox, Continued

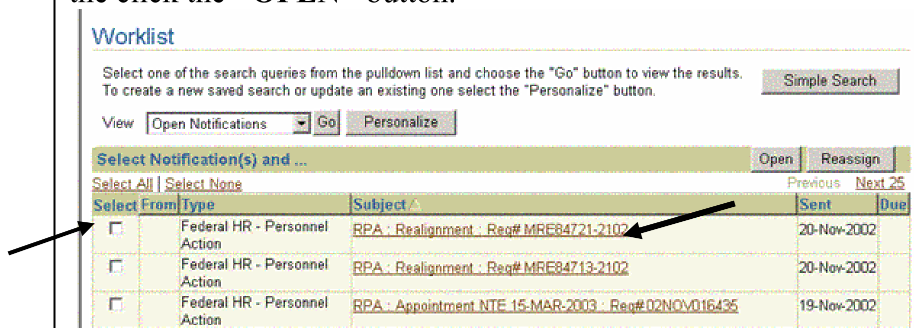
Worklist Window Description (continued)

<table>
<tr><th>Buttons/Links</th><th colspan="2">Function</th></tr>
<tr><td>Open</td><td colspan="2">Opens the selected notification.</td></tr>
<tr><td>Reassign</td><td colspan="2">Currently not available.</td></tr>
<tr><td>Select All</td><td colspan="2">Selects all notifications on the current page using check boxes.</td></tr>
<tr><td>Select None</td><td colspan="2">Deselects notifications.</td></tr>
<tr><td>Next</td><td colspan="2">Allow you to view next 25 notifications for the preconfigured views. (Customized views can be set for a different number to view.)</td></tr>
<tr><td rowspan="8">Columns</td><td colspan="2">Allows you to sort the columns by clicking on the desired column. By default, the list is sorted by sent date from most recent to oldest, and then by subject in alphabetical order. For example, click on Subject and the notifications are sorted alphabetically by subject, i.e., all the cancellations are listed together, and all the corrections are listed together, by Sent date.</td></tr>
<tr><td>From</td><td>The role from which the notification was sent.</td></tr>
<tr><td>To</td><td>The role to which the notification was sent.</td></tr>
<tr><td>Type</td><td>Displays name of the item type of the notification:
• Federal HR-Personnel Action (RPA),
• OTA Training Request Forms.</td></tr>
<tr><td>Subject</td><td>Description of the notification.</td></tr>
<tr><td>Sent</td><td>Date when the notification was delivered.</td></tr>
<tr><td>Due</td><td>Date by which the notification should be completed.</td></tr>
<tr><td>Status</td><td>Shows “Open,” “Closed,” or “Cancelled.”</td></tr>
</table>

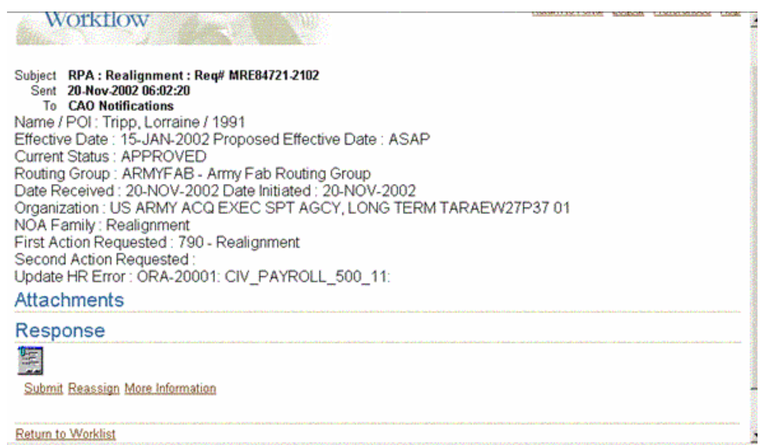
Workflow Inbox, Continued

Viewing the Details of a Notification

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to the full details of a notification by clicking on the notification's underlined Subject link. Or check the select box and the click the <OPEN> button.



</td></tr>
<tr><td>2</td><td>The Notification Details window opens:



If you revisit a notification to which you have already responded, the Response section indicates that the response has been submitted, and displays the response values that were submitted.
If a notification does not require a response, the Response section indicates that as well. Choose the Close button in the Response section to close the notification so that it does not appear in your Worklist the next time you view your open notifications.

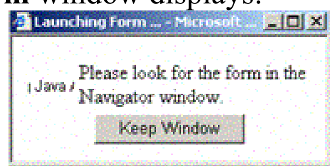
</td></tr>
</table>

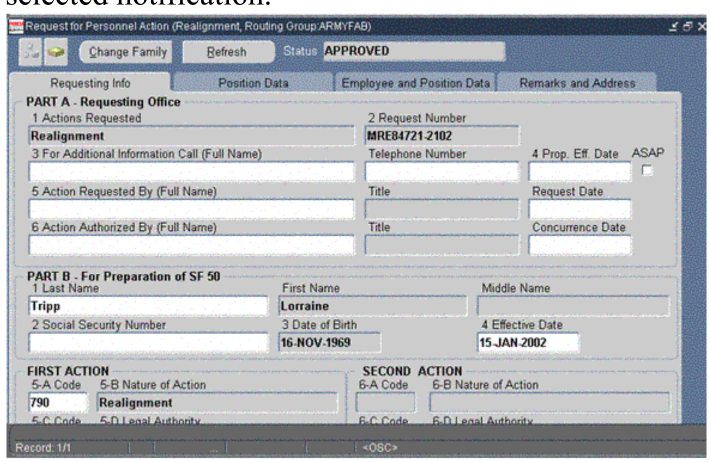
Continued on next page

Workflow Inbox, Continued

Viewing the Details of a Notification (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click on the attached form icon in the Response section to act on the notification.

</td></tr>
<tr><td>4</td><td>The Launching Form window displays:


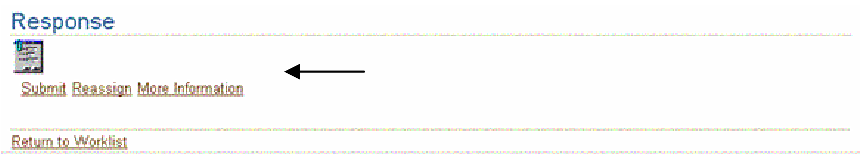
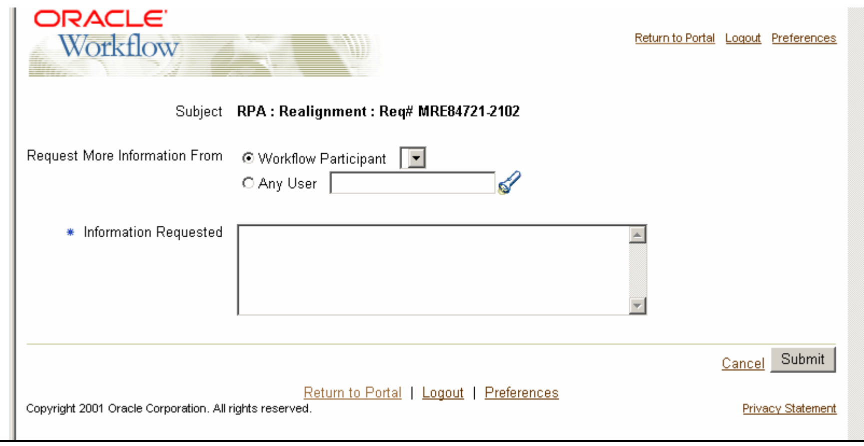
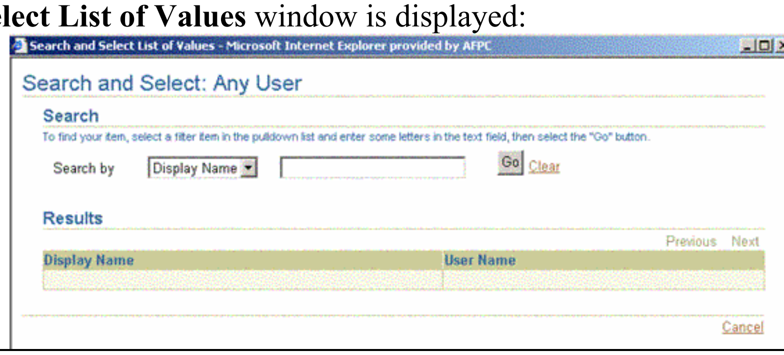
You can choose <Keep Window> to continue displaying the launch window. Otherwise, this window automatically closes after 30 seconds.</td></tr>
<tr><td>5</td><td>The Request for Personnel Action form displays with the details of the selected notification.


Note: If the RPA does not open when selected, it might be “minimized” and you have to click on the Oracle Application at the bottom of your desktop to retrieve it.</td></tr>
<tr><td>6</td><td>Enter your information. Save and route the RPA. Or, if you need more information, close.</td></tr>
</table>

Continued on next page

Workflow Inbox, Continued

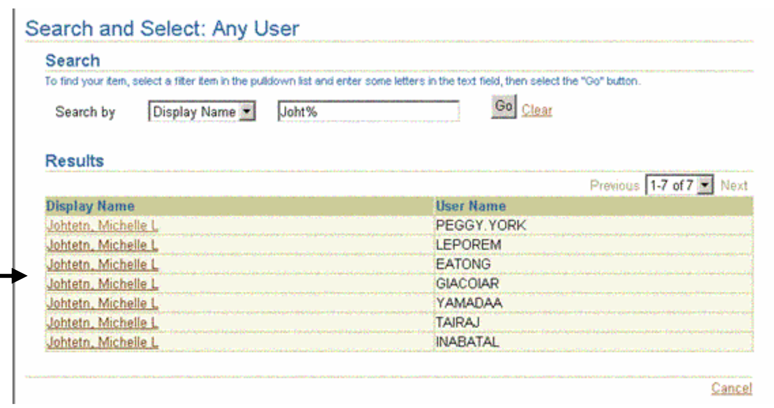
Viewing the Details of a Notification (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>To request additional information for an RPA, click on the More Information link.

</td></tr>
<tr><td>8</td><td>The Request More Information window displays:

</td></tr>
<tr><td>9</td><td>Select Any User, and click on the flashlight. The Search and Select List of Values window is displayed:

</td></tr>
</table>

Continued on next page

Workflow Inbox, Continued

Viewing the Details of a Notification (continued)

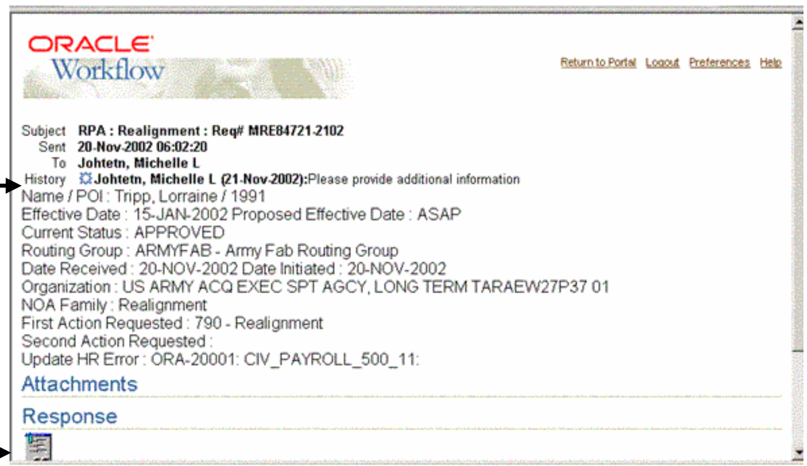
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Choose Search By, Display Name on the drop down list, and enter a value for the display name using the wildcard (%) to search, if necessary. Click <Go> to view the results of the search.

</td></tr>
<tr><td>11</td><td>In the Results section, select a name by clicking on the underlined Display Name. The Request More Information window displays with the selected User Name. Enter your remarks in the Information Requested section. This datafield is required as indicated by the sterisk.

</td></tr>
</table>

Continued on next page

Workflow Inbox, Continued

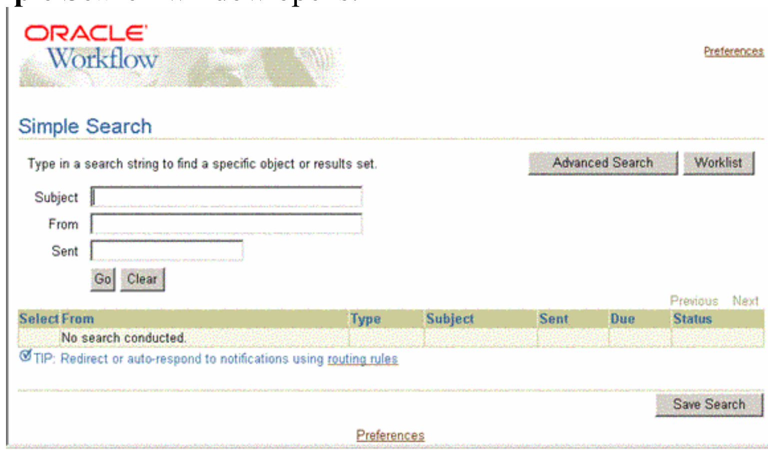
Viewing the Details of a Notification (continued)

Step	Action
12	Click <**Submit**>. The request is sent to the specified user. The user opens up the notification and the following displays:  This **History** line shows who the request was sent to along with comments from the sender. The receiver then clicks on the **Response Icon.** You can also select <**Cancel,**> to return to the previous page without sending the request. After you request more information for a notification, the notification does not appear in your **Worklist** as an open notification until the user responds to your request. However you can still view the notification by selecting the view **Notifications From Me** from the Worklist window. • If you do not want to wait for the additional information requested, you can respond to the notification using the Response section of the Notification Details page. In this case, your pending request is cancelled. • If you want to request more information from a different user, you can submit a new request using the <**More Information**> button in the **Response** section of the Notification Details page. In this case, your initial request is replaced by the new request, and only the user to whom you sent the new request can respond with more information.

Continued on next page

Workflow Inbox, Continued

Simple Search

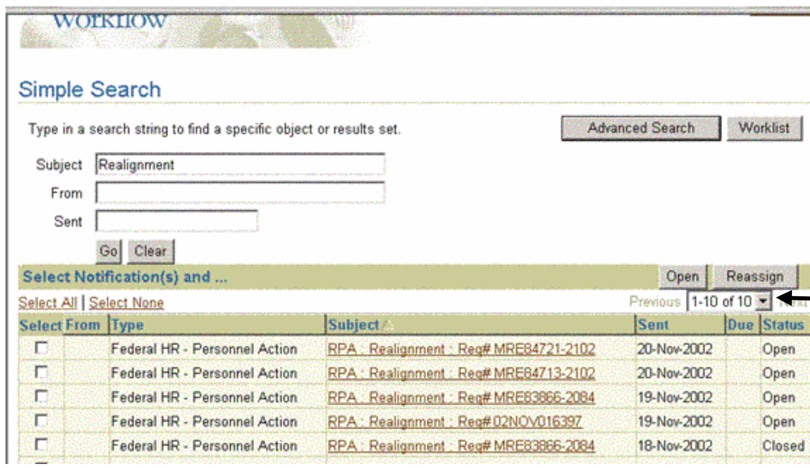
Step	Action
1	On the **Worklist** Window, click the<**Simple Search>** button**.** The **Simple Search** window opens: 
2	Enter your search criteria to locate specific notifications. The search options are ***Subject, From***, and ***Sent***. The **Simple Search** window will displays with that search data field populated. 
3	Click <**Go**>

Continued on next page

Workflow Inbox, Continued

Simple Search (continued)

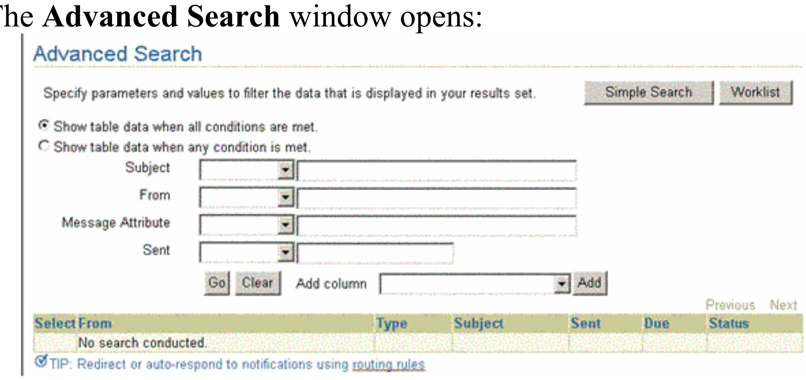
Step	Action
4	The **Simple Search** window displays the notifications that match your criteria including those that are closed. Click <**Save**> to save your search for a future view. If this search does not provide enough parameters, you can go to the <**Advanced Search**> for additional features.



Note: The total number of records that match your criteria is indicated above the notifications list.

Advanced Search

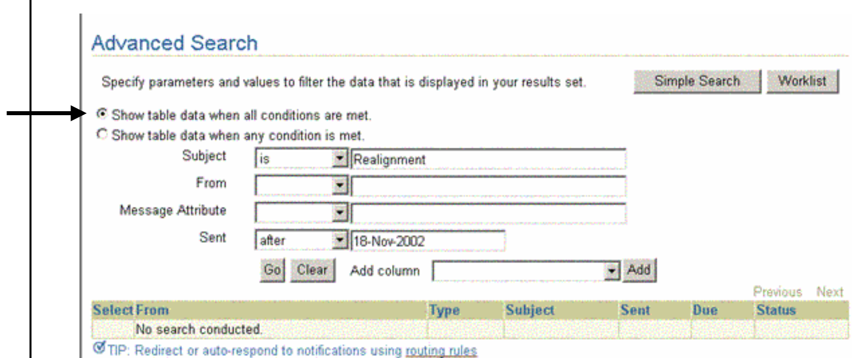
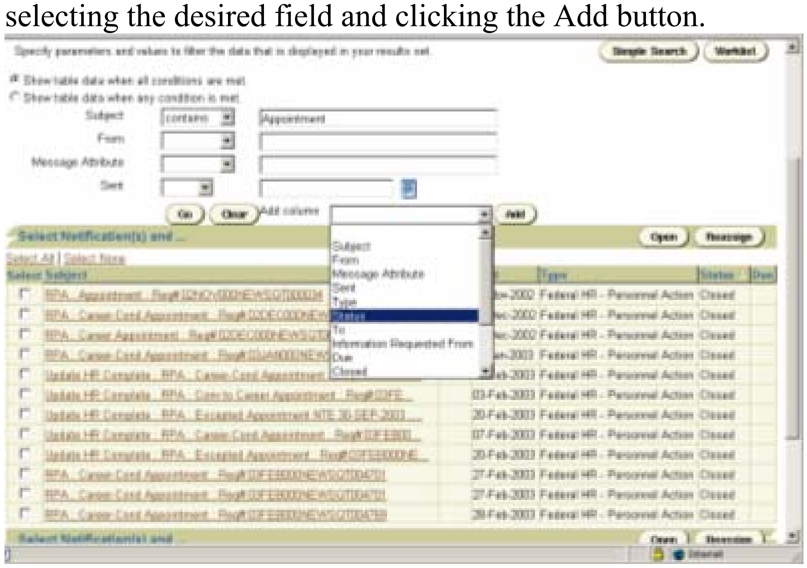
Step	Action
1	On the **Simple Search** window, click the <**Advanced**> button. The **Advanced Search** window opens:



Continued on next page

Workflow Inbox, Continued

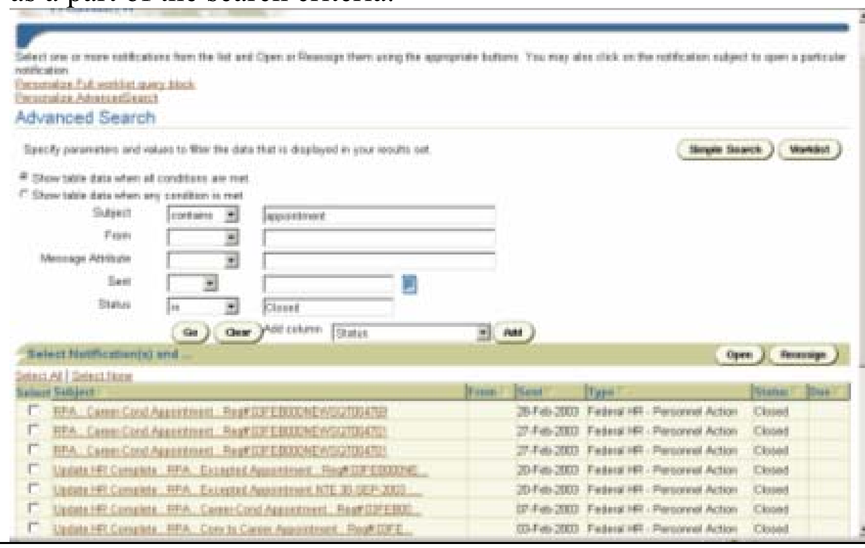
Advanced Search (continued)

Step	Action
2	Select one of the options for locating specific notifications. Select one of the two radio buttons: • "Show table data when all conditions are met." (Results in notifications that only met all of your criteria.) • "Show table data when any condition is met." (Results in notifications that match at least one of your search criteria.)
3	To select notifications that meet all conditions, click the first radio button. 
4	You have the ability to add additional columns to your search by clicking on the drop down arrow beside the "Add column" field, selecting the desired field and clicking the Add button. 

Continued on next page

Workflow Inbox, Continued

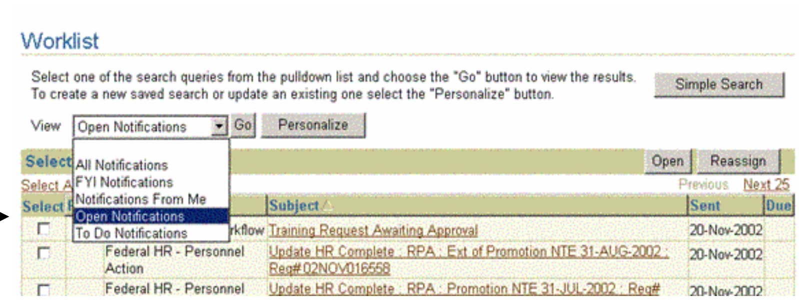
Advanced Search (continued)

Step	Action
(Cont)	When the window repopulates you will see the selected field now as a part of the search criteria. 
5	In the ***Subject*** drop down list, select “contains.”
6	Enter “Realignment” in the subject data field.
7	In the ***Sent*** drop down list, select “after” and enter the date.
8	Click <**Go**>. The **Advanced Search** result displays: 
9	You can save this search criteria for future use by clicking the <**Save Search**> button at the bottom of the Worklist**.** The **Create View** window displays. Follow the procedures for creating a view if desired. See **Personalized View** in this section for details.

Continued on next page

Workflow Inbox, Continued

Personalized View

Step	Action
1	The **Worklist** window defaults to “Open Notifications.” There are four other preconfigured views on the drop down list: • All Notifications • FYI Notifications (Includes those not routed for approval) • Notifications From Me (Only those you generated) • To Do Notifications (Require actions) 
2	Use any of the preconfigured views, or create your own view. Click the <**Personalize**>button. The **Personal Worklist Views** window opens: 

Continued on next page

Workflow Inbox, Continued

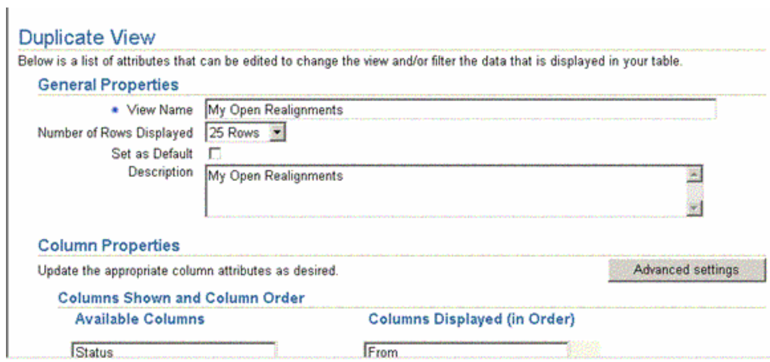
Personalized View (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

- You can duplicate one of the preconfigured views by selecting one of the views and clicking the <**Duplicate**> Button.
- Or you can create your own view, by clicking on the **Create View** Link at the bottom of the window.

</td></tr>
<tr><td>4</td><td>

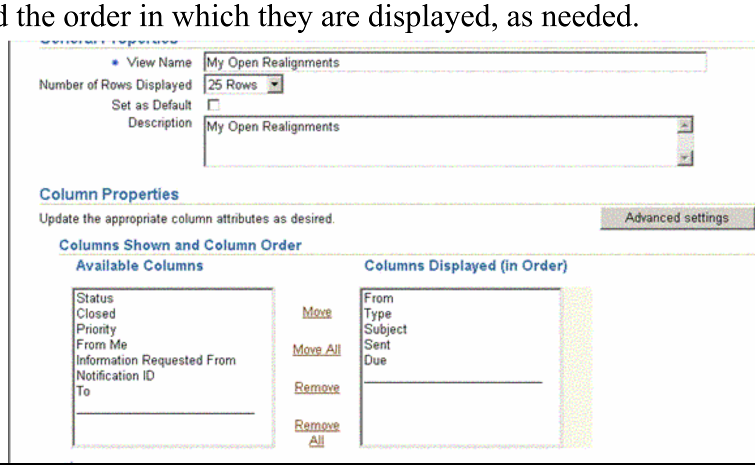
To duplicate a preconfigured view, select the view to duplicate, i.e. Open Notifications. Click the <**Duplicate**>. button The Duplicate View window opens:



</td></tr>
<tr><td>5</td><td>

In the **General Properties** section, enter a ***View Name***, ***Number of Rows*** to be displayed, and a ***Description.*** If you would like this view to be the default view when opening the Worklist, check the **Set as Default** box (currently not working.)

Under **Column Properties**, update the columns to be displayed, and the order in which they are displayed, as needed.



</td></tr>
</table>

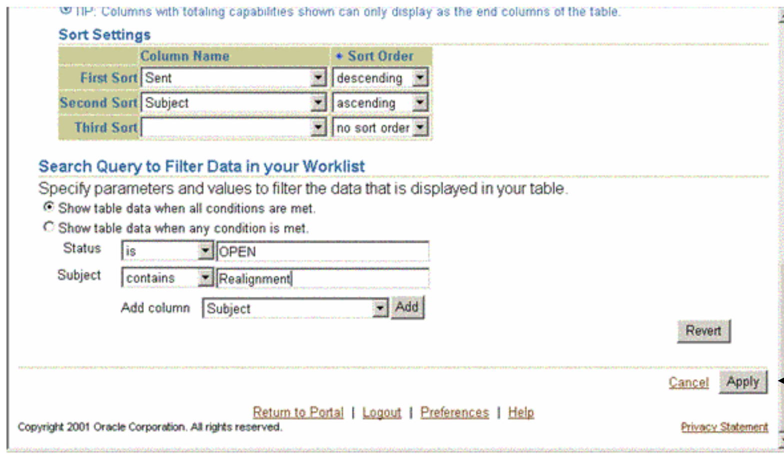
Continued on next page

Workflow Inbox, Continued

Personalized View (continued)

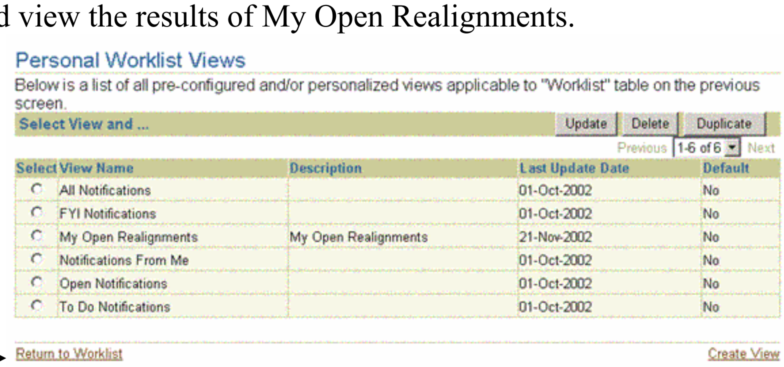
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

- Use the **Sort Settings** section to modify any of the default settings for your custom view.
- To specify additional parameters and values to filter data, make changes in the **Search Query to Filter Data in your Worklist** section.



Click on the <**Apply**> button when finished to save the new view.</td></tr>
<tr><td>7</td><td>

The **Personal Worklist Views** Window displays, and the list of views now includes the new custom view, **My Open Realignments.** Click on the **Return to Worklist** link to select and view the results of My Open Realignments.



</td></tr>
</table>

Continued on next page

Workflow Inbox, Continued

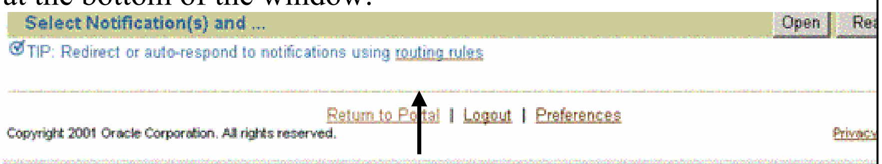
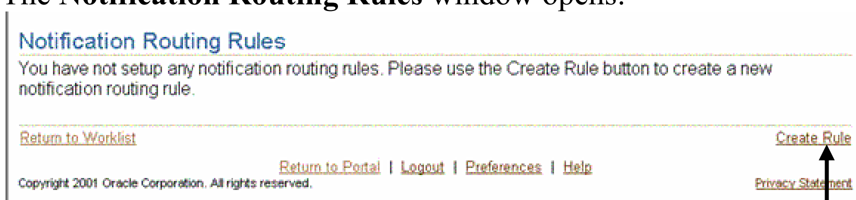
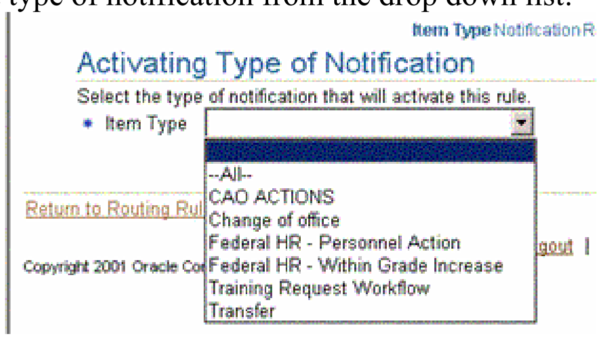
Personalized View (continued)

Step	Action
8	After selecting **My Open Realignments** view, the results display: 
9	To create your own custom view, click on the <**Personalize**> button from the Worklist window. The **Personal Worklist Views** window opens.  Click on the underlined **Create View** link.
10	Follow the instructions for **Duplicate** view (Steps 4 – 6), to create a new custom view.

Workflow Inbox, Continued

Creating Routing Rules

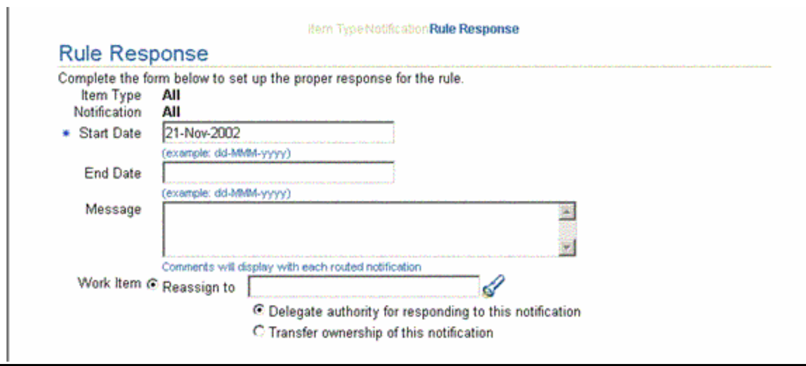
You can create customized routing rules for automatic notification processing. For example, you can route certain types of notifications to a co-worker for coordination.

Step	Action
1	On the **Worklist** window click the underlined **routing rules** link at the bottom of the window: 
2	The **Notification Routing Rules** window opens: 
3	Click on the underlined **Create Rule.** The **Activating Type of Notification** window opens: 
4	Choose a type of notification from the drop down list:  **Note:** If you choose "All" you can skip to Step 3 Next at the lower right corner.

Continued on next page

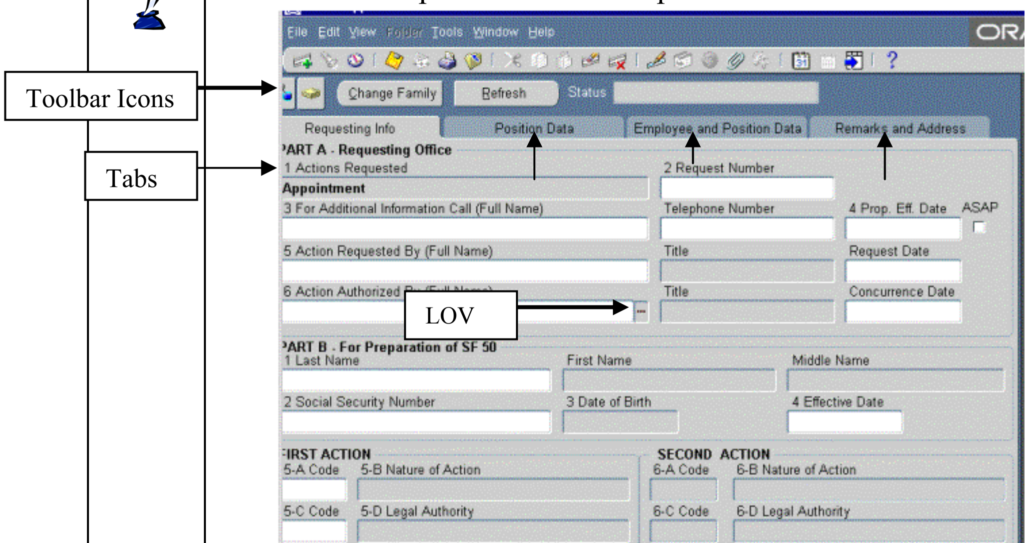
Workflow Inbox, Continued

Creating Routing Rules (continued)

Step	Action
5	Click the <**Next**> button. The **Rule Response** window opens: 
6	Enter values in the ***Start Date*** and ***End Date*** fields to specify the period that this rule should be active. • If you leave the ***Start Date*** blank, the rule is effective immediately. • If you leave the ***End Date*** blank, the rule is effective indefinitely. **CAUTION:** Since you can define different rules for the same notifications to be effective at different time, the system allows you to define multiple rules for the same notifications. • You should be careful to ensure that rules for the same notifications do not overlap in their effective dates. • If multiple rules are effective for the same notification, Workflow picks one rule at random to apply.
7	In the **Message** field, enter any text that you want to append to the notification when the rule is applies. **Note**: "**Reassign to**" is currently under development.
8	Choose: • <**Submit**> to save the rule, • <**Cancel**> to return to the Worklist without creating or updating the rule, or, • <**Back**> if you are creating a new rule, to return to the previous page.

Request for Personnel Action (RPA)

Accessing the RPA

Step	Action
1	**Navigation Path → Req Personnel Action → Appointment → Open**. **Note:** Refer to section, "Helpful Function Keys and Icons" in this Guide for an explanation or description of the Toolbar Icons. 
2	There are four tabs across the top: • **Requesting Info** • **Position Data** • **Employee and Position Data** • **Remarks and Address**

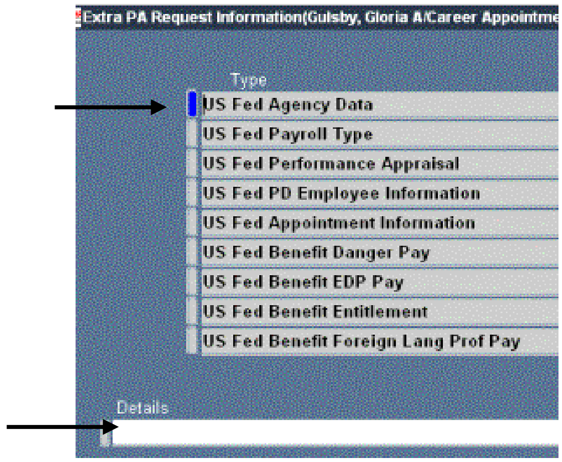
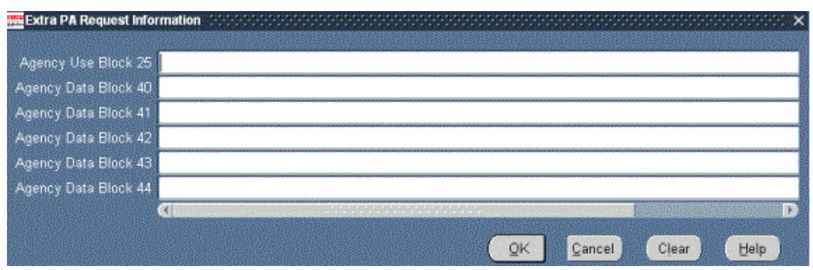
Completing the RPA

Step	Action
1	Complete the data fields on **Requesting Info** Tab, using the "pop lists" attached to each data field.
2	Proceed to the next tab until the **RPA** is complete.
3	**Save.**

Continued on next page

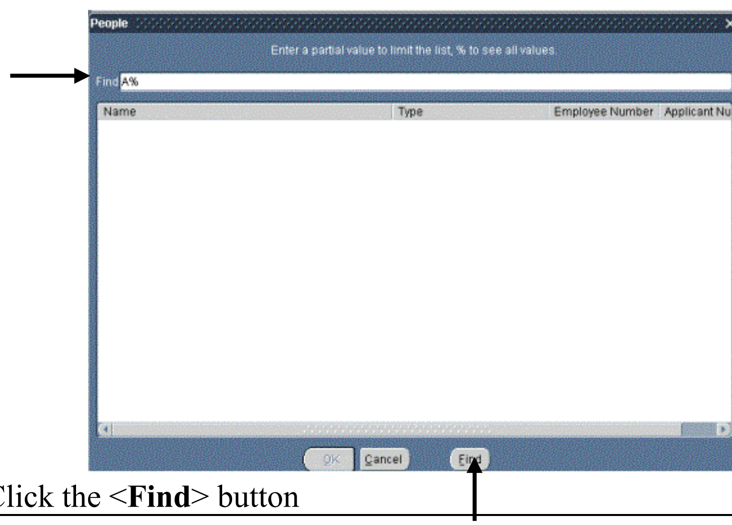
Request for Personnel Action (RPA), Continued

Completing the RPA (continued)

Step	Action
4	Click the <**Extra Information**> button. The **Extra Information** Flexfields opens: 
5	Click on **US Fed Agency Data.** Click in the **Details** Box. The **Extra PA Request Information** Flex field displays with information in the appropriate fields: 
6	Click on **US Fed Payroll Type.** Complete the data entry and complete the remaining flex fields.
7	**Save** and **Route.**

People Window

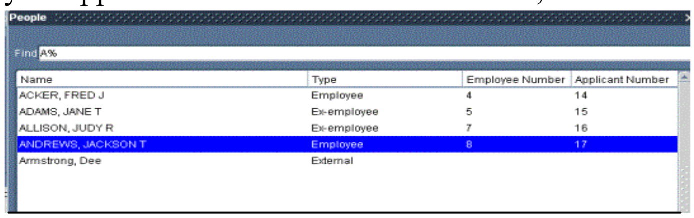
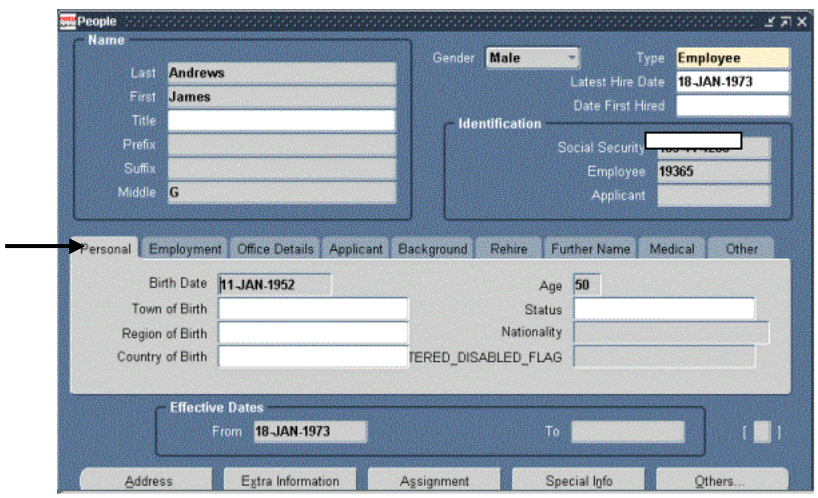
Accessing the People Window

Step	Action
1	**Navigation Path → People → Enter and Maintain.** The **Find Person** window displays: 
2	If you are building an applicant, click the <**New**> button. The **People** window displays. Complete the data fields.
3	If you need to make a change to an employee record or view the information in the **Person Summary**, click the LOV at the end of the **Full Name** data field on the **Find Person** Window.
4	The **People** –**Find** window displays. • Enter a % sign to view all the names in the data base, or • Enter the first letter of the last name with a % sign. For example: "A%" displays all last names starting with an "A."  Click the <**Find**> button

Continued on next page

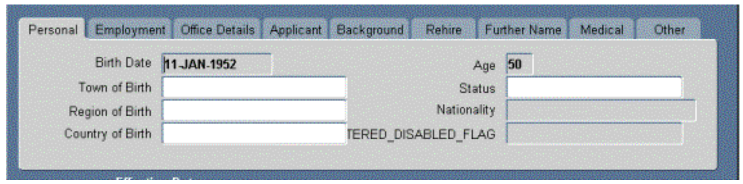
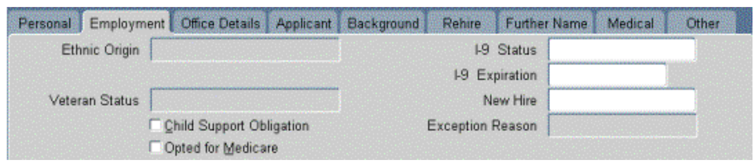
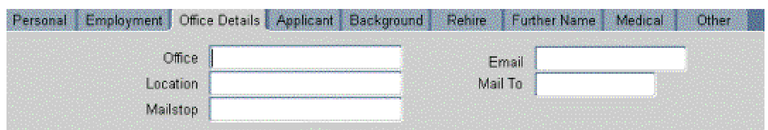
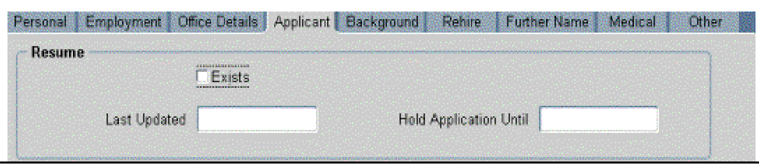
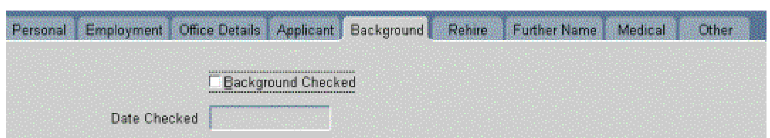
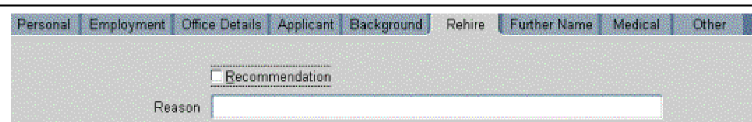
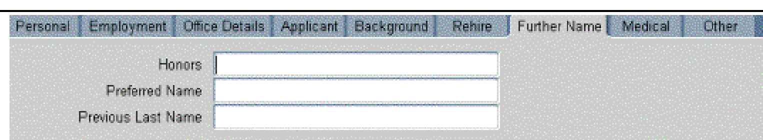
People Window, Continued

Accessing the People Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The People – Find Window displays with a list of names and Employee/Applicant Numbers. Select the name, and click <OK>.

</td></tr>
<tr><td>6</td><td>The People window displays the data fields automatically populated. There are nine tabs and five task flow buttons. The Personal Tab displays first.

</td></tr>
</table>

People Window, Continued

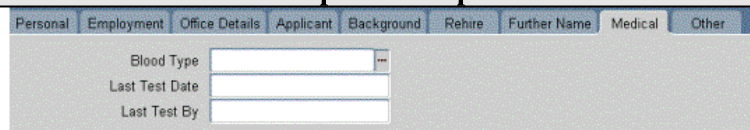
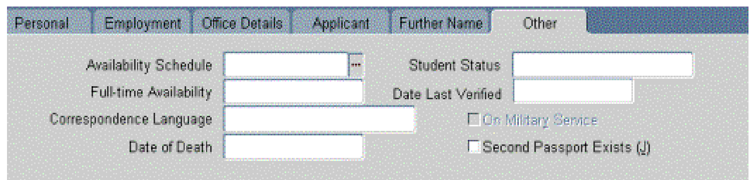
People Window Description

Tab	Example/Description
Personal	
Employment:	
Office Details	
Applicant	
Background	
Rehire	
Further Name	

Continued on next page

People Window, Continued

People Window Description (continued)

Tab	Example/Description
Medical	
Other	

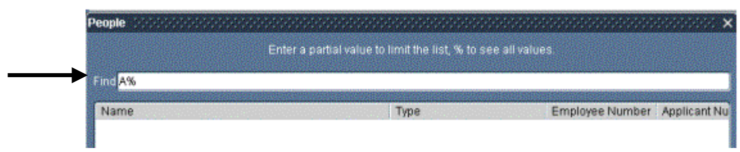
People Window Task flow Buttons

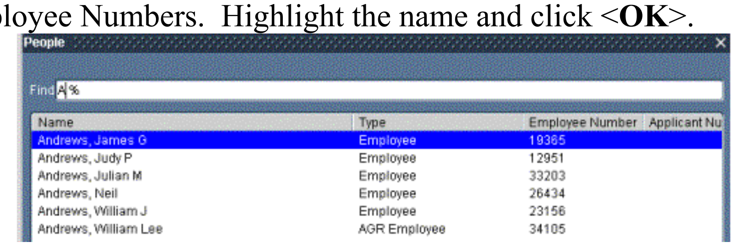
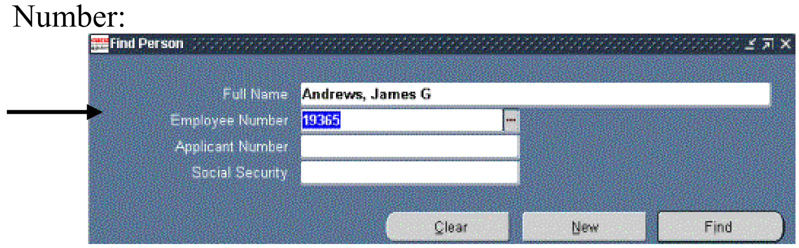
The **People** Window has five Task flow Buttons:

- **Address**
- **Extra Information**
- **Assignment** (has six tabs)
- **Special Information**
- **Others** (with **Navigation Options** including the **Person Summary**)

Person Summary

Accessing the Person Summary

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation Path → People → Enter and Maintain. The Find Person Window displays. (For examples, refer to Accessing the People Window in this guide.)</td></tr>
<tr><td>2</td><td>Click the LOV at the end of the Full Name data field.</td></tr>
<tr><td>3</td><td>The People –Find Window displays.
• Enter a % sign to view all the names in the data base, or
• Enter the first letter of the last name with a % sign. For example: “A%” displays all last names starting with an “A.”


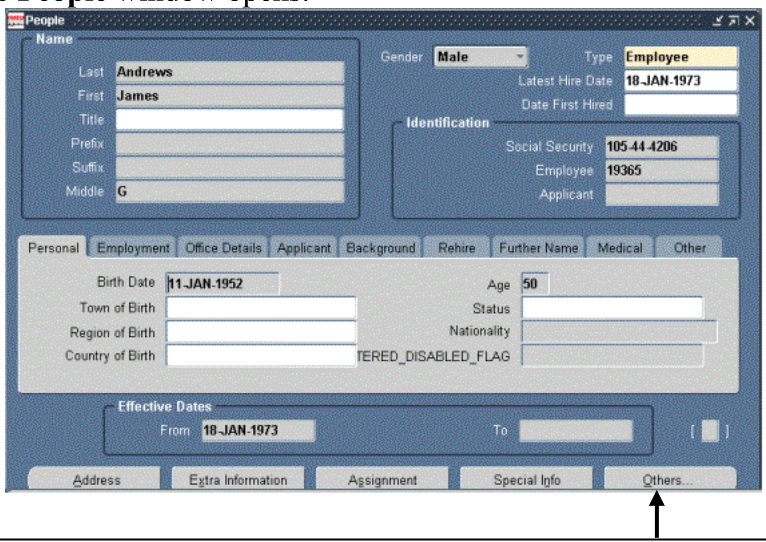
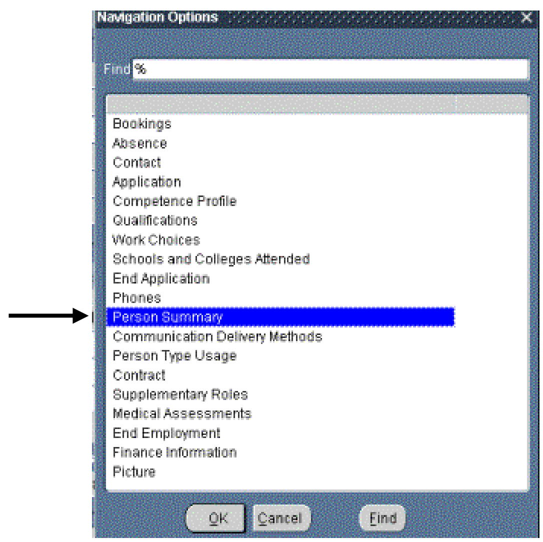
Click the <Find> button</td></tr>
<tr><td>4</td><td>The People – Find window opens with list of names and Employee Numbers. Highlight the name and click <OK>.

</td></tr>
<tr><td>5</td><td>The Find Person window displays the Employee Name, and Number:


Click the <Find> button.</td></tr>
</table>

Continued on next page

Person Summary, Continued

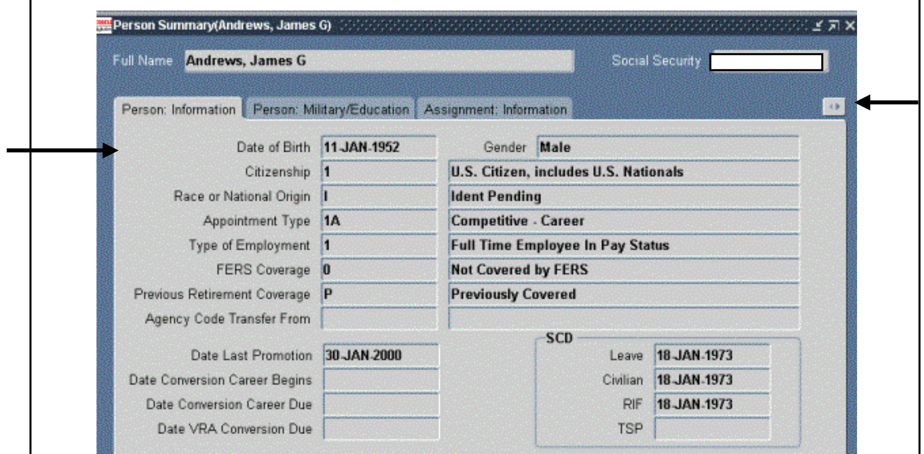
Accessing the Person Summary (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>The People window opens:

</td></tr>
<tr><td>7</td><td>Click the <Others> button. The Navigation Options window opens:

</td></tr>
<tr><td>8</td><td>Select Person Summary and click the<OK> button.</td></tr>
</table>

Continued on next page

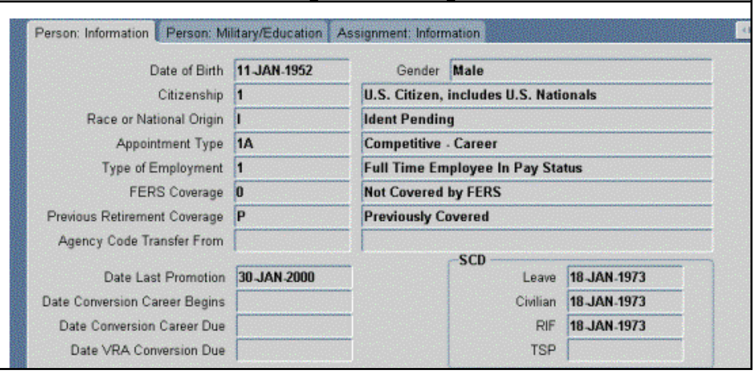
Person Summary, Continued

Accessing the Person Summary (continued)

Step	Action
9	The **Person Summary** window displays three tabs (Person Information, Person: Military/Education, and Assignment Information): 

Person Summary Window Description

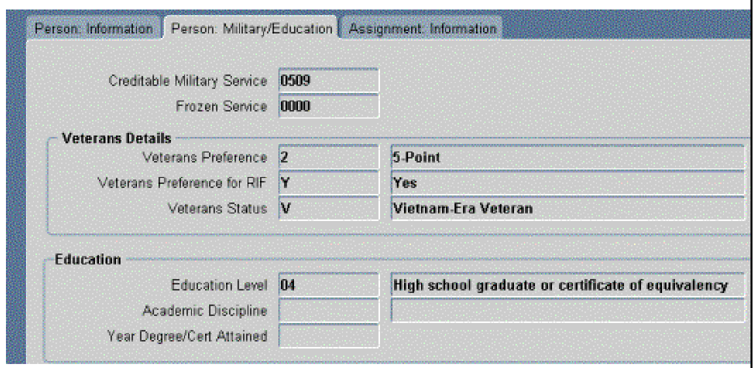
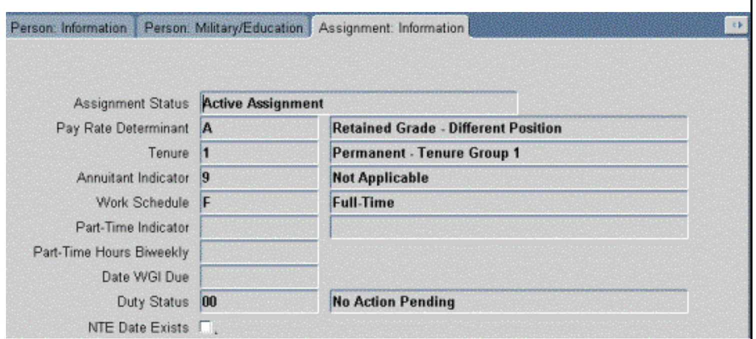
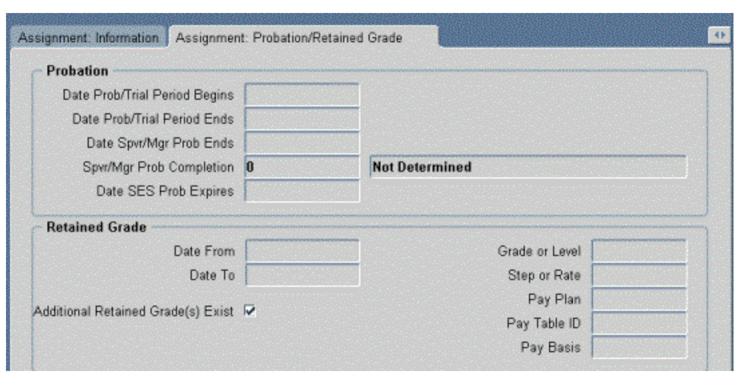
There are 12 tabs on the **Person Summary** Window. Nine more tabs are available when you click the arrows to the right of the tab headings:

Tab	Example/Description
Person Information	

Continued on next page

Person Summary, Continued

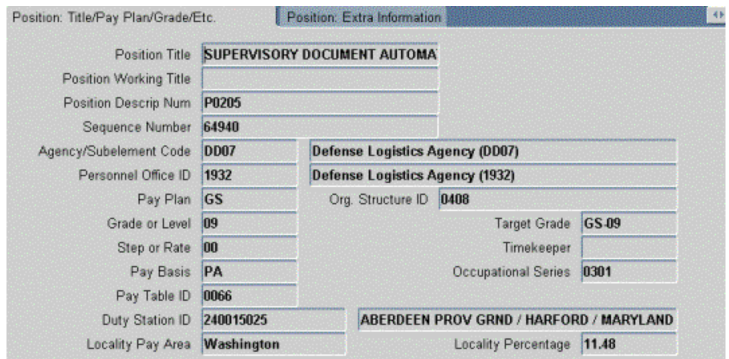
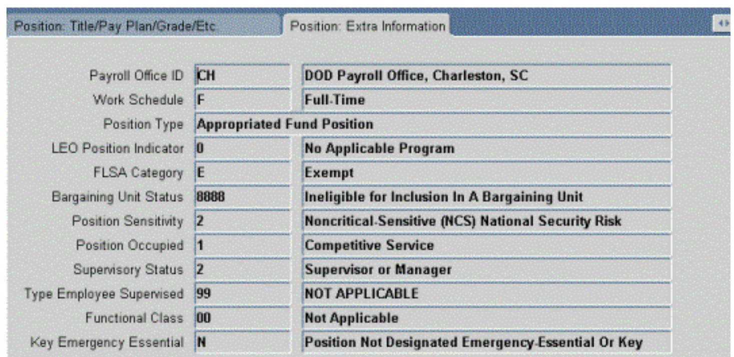
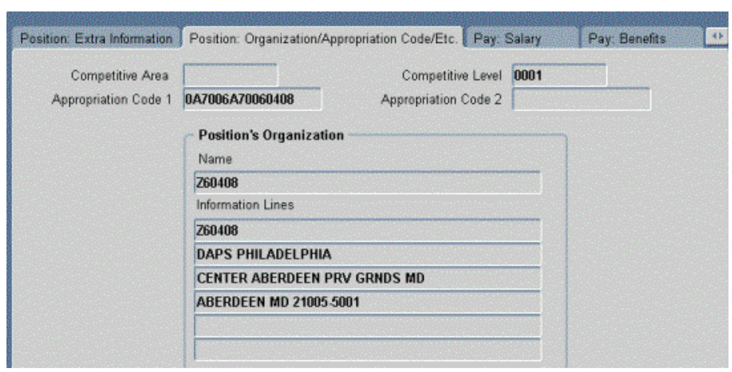
Person Summary Window Description (continued)

Tab	Example/Description
Person Military/ Education	
Assignment Information	
Assignment Probation/ Retained Grade	Click the arrow box to the right to display remaining tabs: 

Continued on next page

Person Summary, Continued

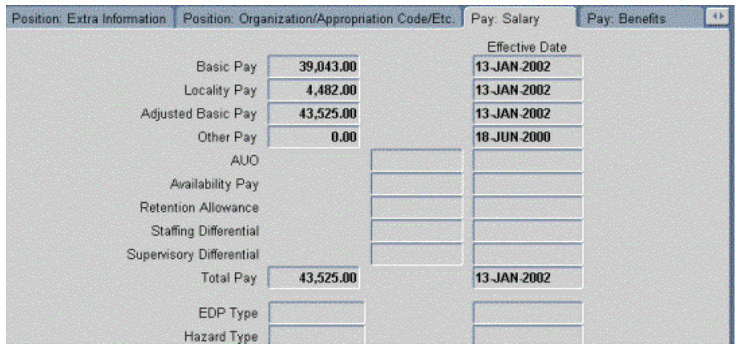
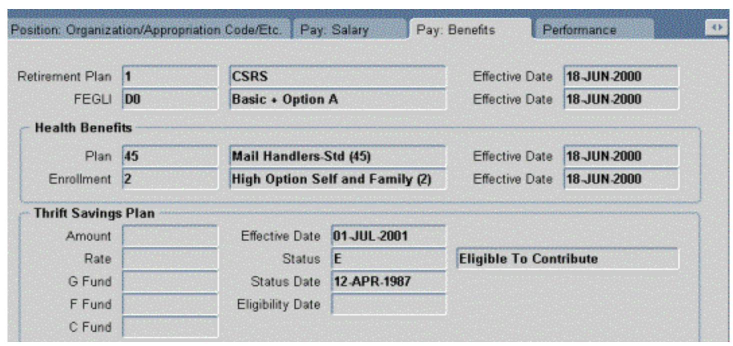
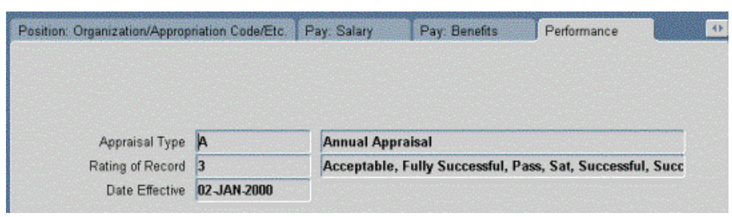
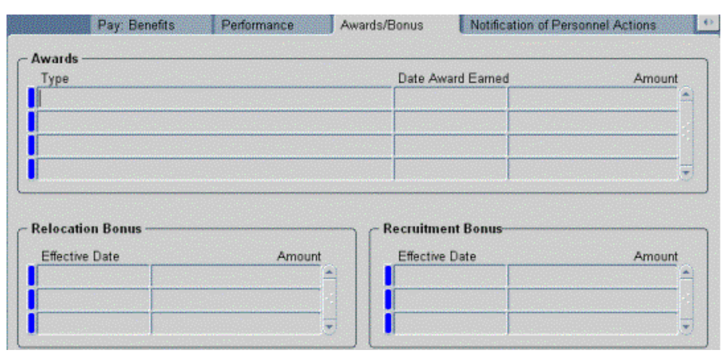
Person Summary Window Description (continued)

Tab	Example/Description
Position: Title/Pay Prev/Grade, Etc.	
Position: Extra Information	
Position: Organization/ Appropriation Code/Etc.:	

Continued on next page

Person Summary, Continued

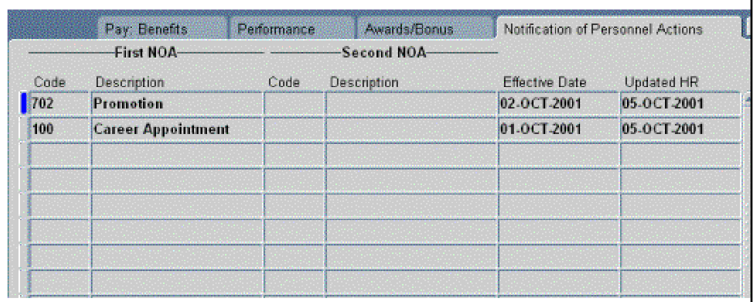
Person Summary Window Description
(continued)

Tab	Example/Description
Pay Salary	
Pay Benefits	
Performance	
Awards/Bonus **Note:** Awards will only appear if within the current pay period. If user wishes to view a past award, they'll have to date track to the pay period in which the award was paid to view award details above.	

Continued on next page

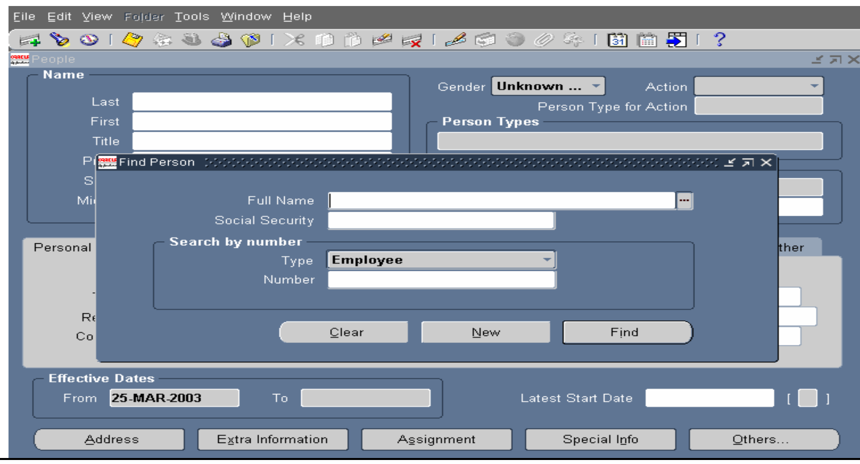
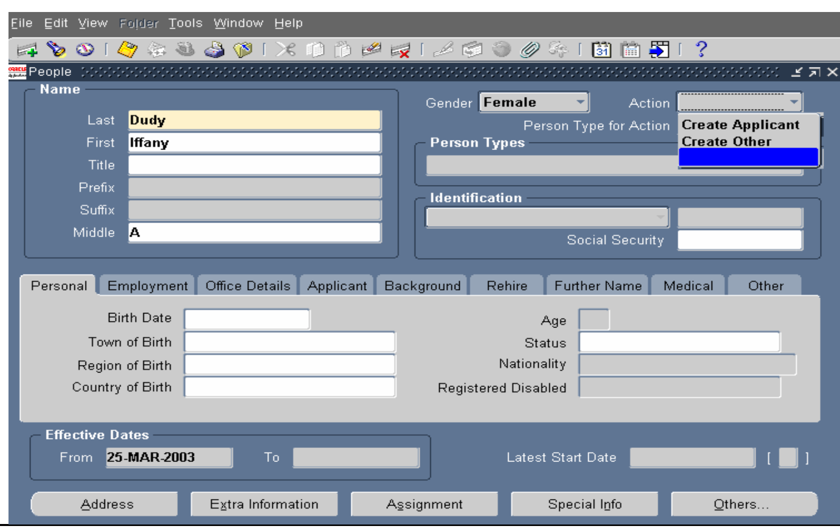
Person Summary, Continued

Person Summary Window Description (continued)

<table>
<tr><th>Tab</th><th>Example/Description</th></tr>
<tr><td>Notification of Personnel Actions</td><td>
</td></tr>
</table>

Building an Applicant

Building an Applicant

Step	Action
1	Navigation Path → **People** → **Enter and Maintain.** Click on **<New>** 
2	**People Window - Note: Date Track** Then fill in the **Last Name, First Name,** and **Middle Initial (if one),** then **Gender,** Under **Action** Click: **<Create Applicant>** **NEVER USE** <Create Other> button under **Action**. 

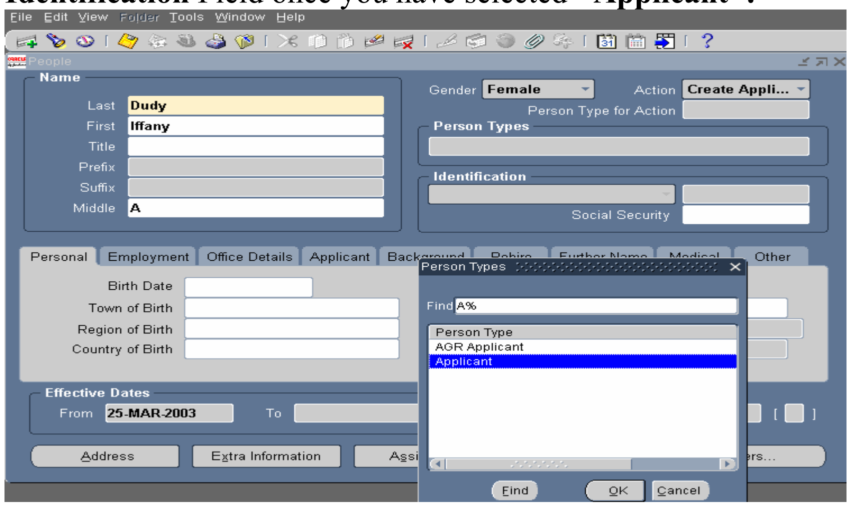
Continued on next page

Building an Applicant, Continued

Building an Applicant (continued)

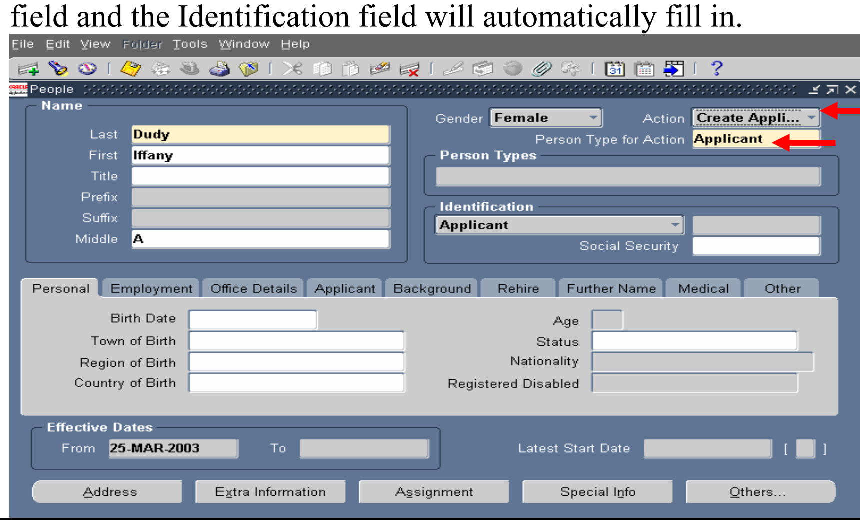
3

Select <**Applicant**>
Note: Once you have click on **<Create Applicant>** in the Action Field, you will receive the **Person Type** pop-up window and will automatically fills in the **Person Type for Action** field and the **Identification** Field once you have selected **<Applicant>.**



4

Once back at the <People> window the <Person Type for Action field and the Identification field will automatically fill in.

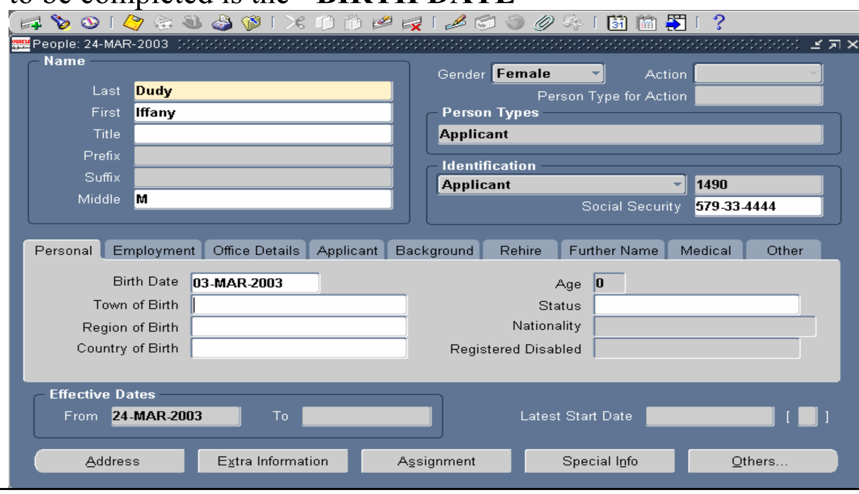


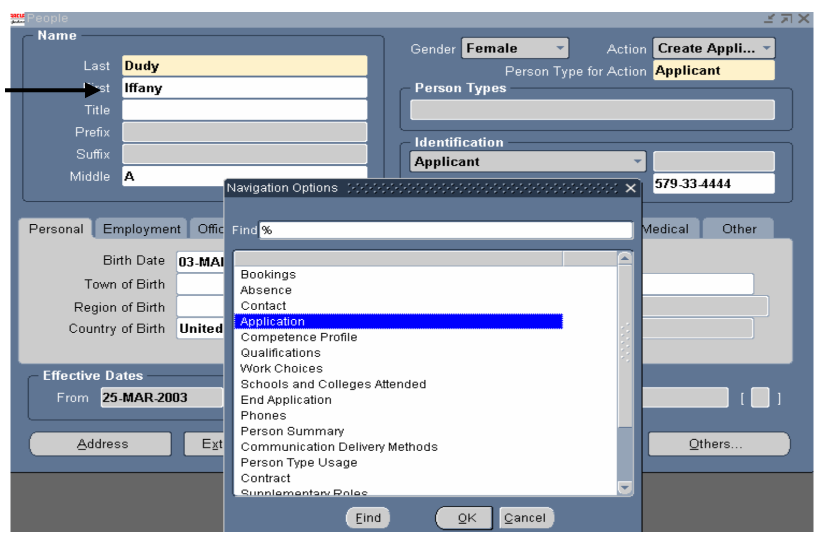
Continued on next page

Building an Applicant, Continued

Building an Applicant (continued)

<table>
<tr><td>5</td><td>Once you return to the <People> window you will see tabs in the middle of the screen. Under <Personal> the only field that needs to be completed is the <BIRTH DATE>

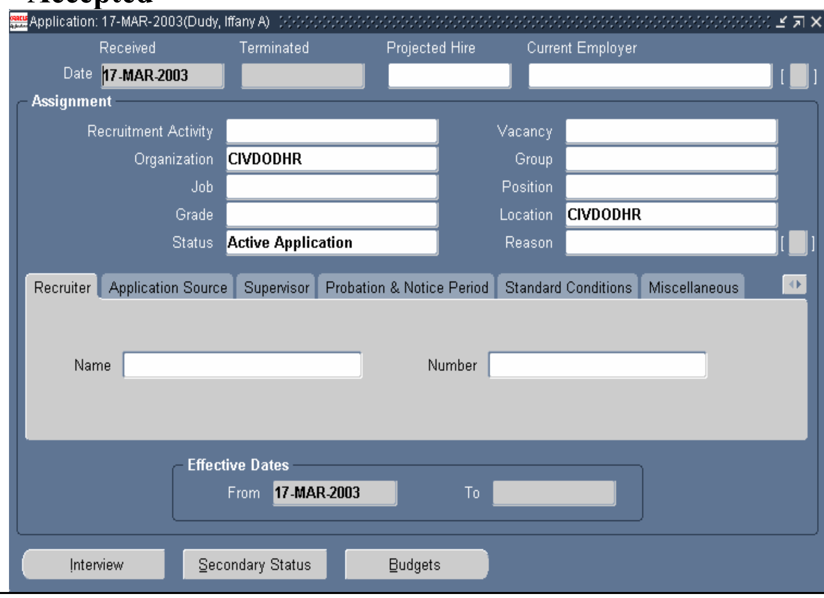
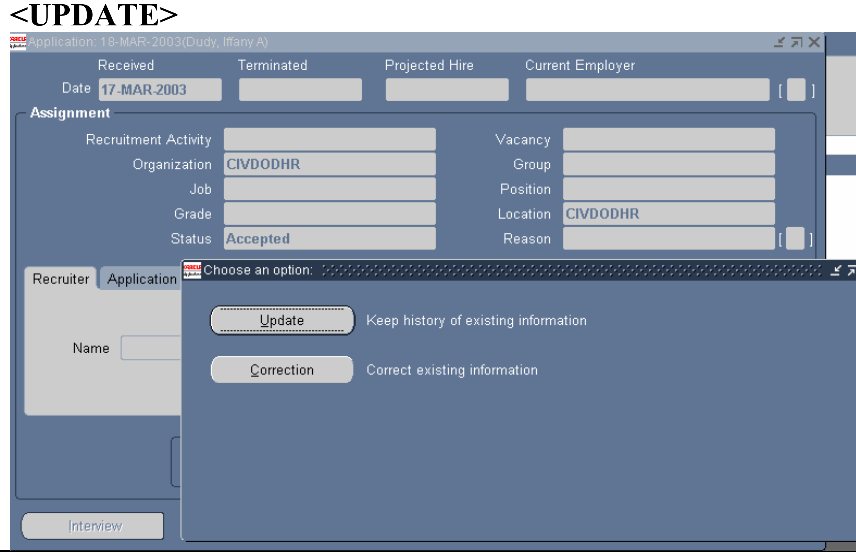

</td></tr>
<tr><td>6</td><td>Click on the <Others> Taskflow button and select Application.


</td></tr>
<tr><td>7</td><td>Note: System will not allow you go further without saving <SAVE></td></tr>
</table>

Continued on next page

Building an Applicant, Continued

Building an Applicant (continued)

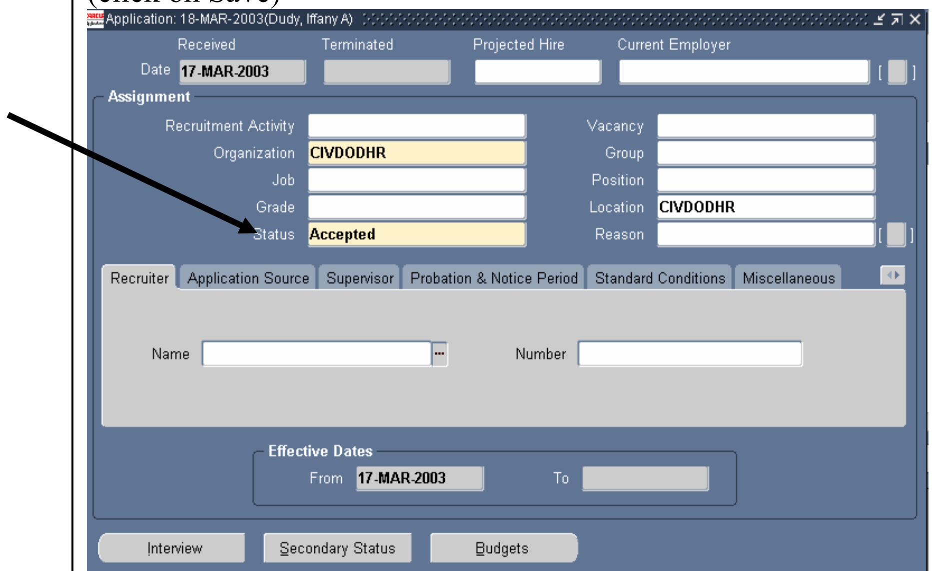
<table>
<tr><td>8</td><td>Date Track to the Next Day from the Date received
Click in the Status field, the Lov button appears. Select <Accepted>

</td></tr>
<tr><td>9</td><td>The dialog box appears, you have the choice to select either <Update or Correction>
Note: Since you are building an applicant we would select <UPDATE>

</td></tr>
</table>

Continued on next page

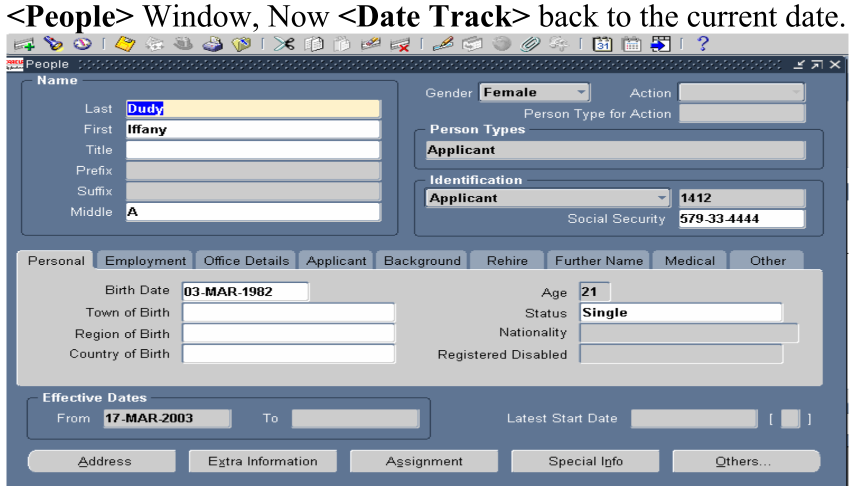
Building an Applicant, Continued

Building an Applicant (continued)

<table>
<tr><td>10</td><td>Note: the Assignment screen now shows the status as Accepted (click on Save)



</td></tr>
<tr><td>11</td><td><People> Window, Now <Date Track> back to the current date.



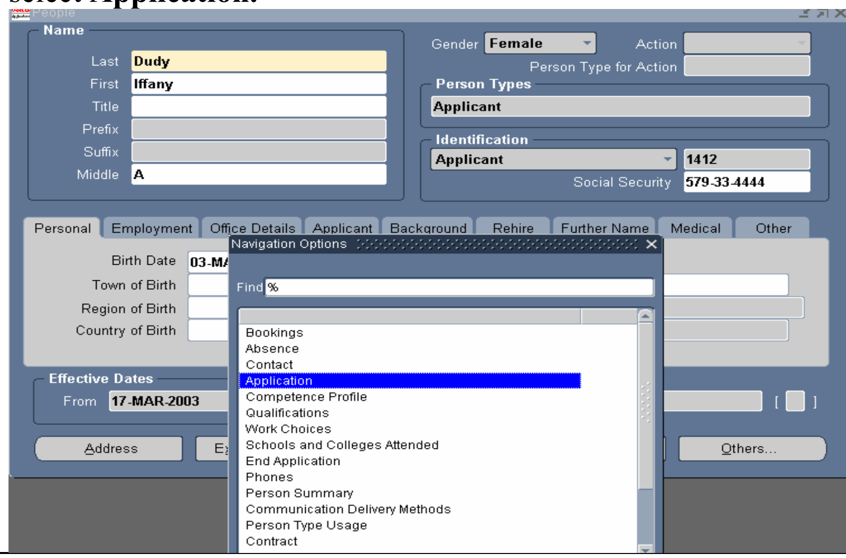
</td></tr>
<tr><td>12</td><td><Save> and now your applicant is built.</td></tr>
</table>

Deleting an Applicant

Deleting an Applicant

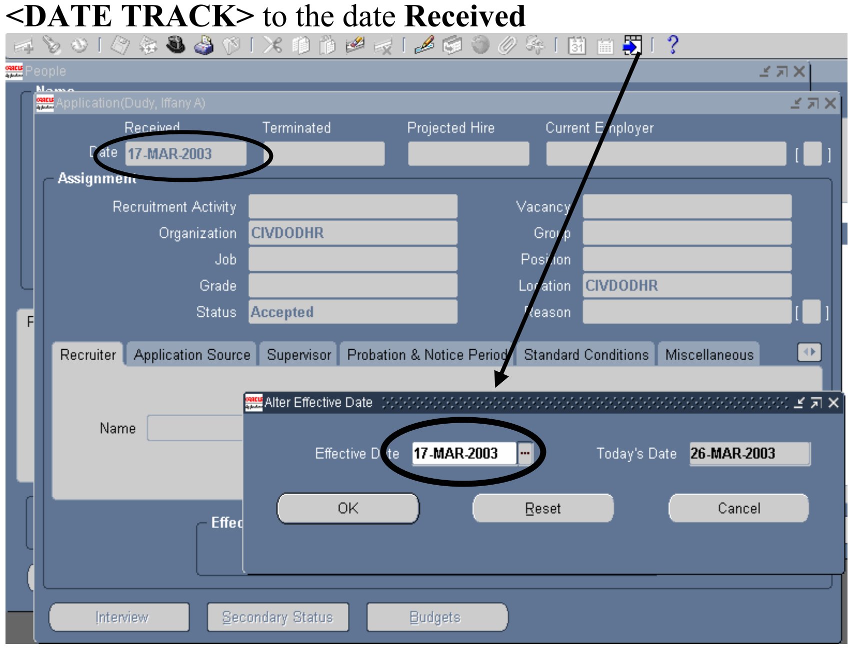
1

Locate the person you wish to delete as an applicant. From the **<People>** window, click on the **<Others>** taskflow button and select **Application.**



2

<DATE TRACK> to the date **Received**

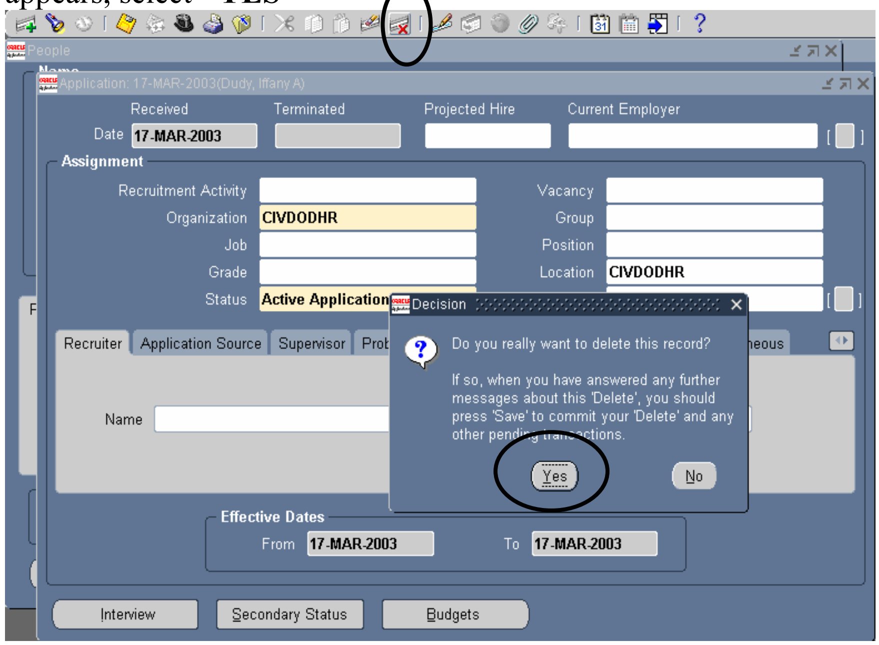


Continued on next page

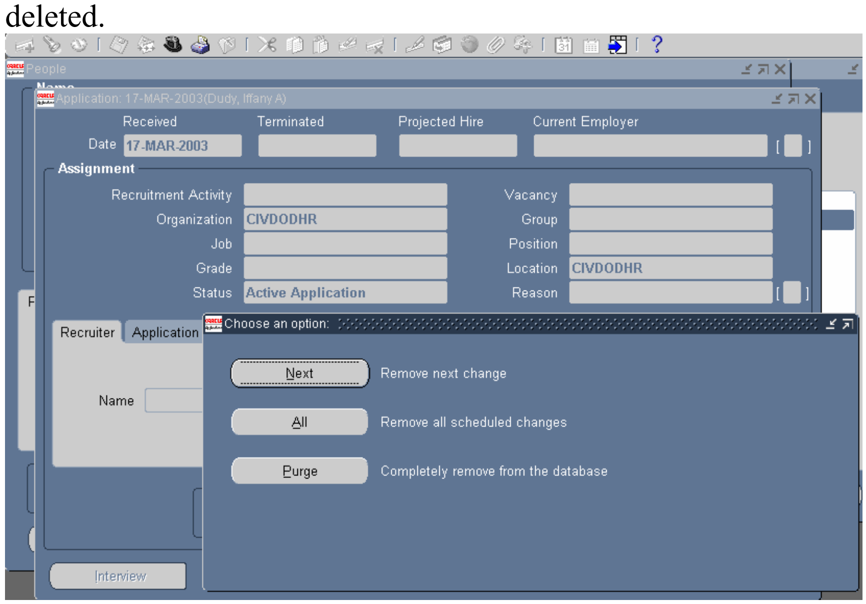
Deleting an Applicant, Continued

Deleting an Applicant (continued)

3 Click on the **Small Red X (Delete Button).** The decision box appears, select **<YES>**



4 Another dialog box will appear. Select **<Next>**
Note: If you select **Purge** all parts of the applicant will **NOT** be deleted.

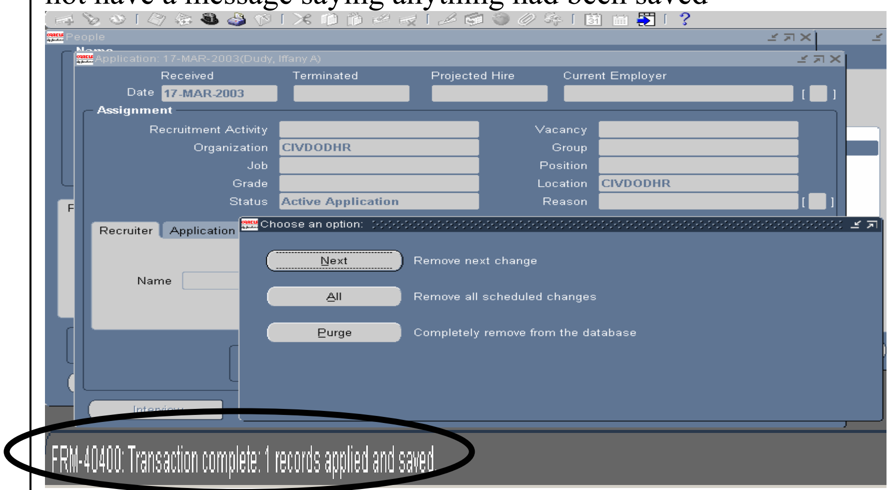


Continued on next page

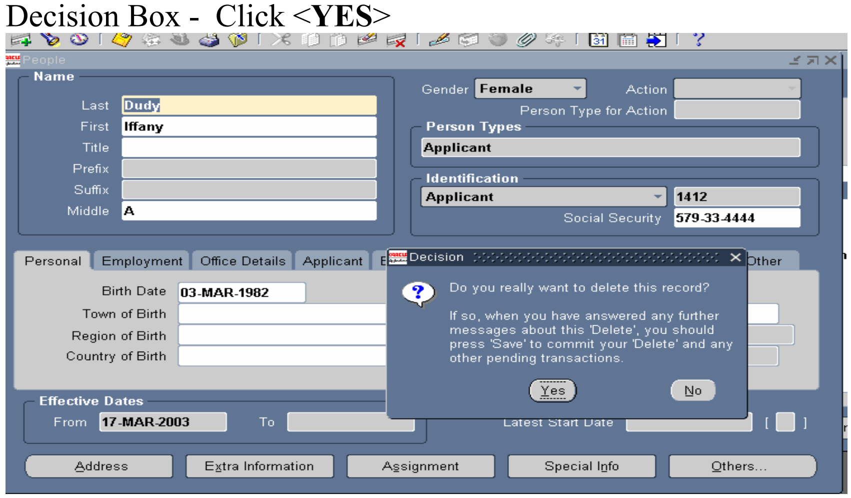
Deleting an Applicant, Continued

Deleting an Applicant (continued)

<table>
<tr><td>5</td><td>Click **<Save>** You will receive a message in the Message line at the bottom of the page stating **“Transaction Complete”**
Then close application/assignment window
Note: If you selected <Purge> from the Decision box, you would not have a message saying anything had been saved



</td></tr>
<tr><td>6</td><td>Now you have receive the notice “Transation Complete”on the **<People>** window. You will now go throught he same steps as on the Application window.
Click the <Delete Icon>
Decision Box - Click <**YES**>

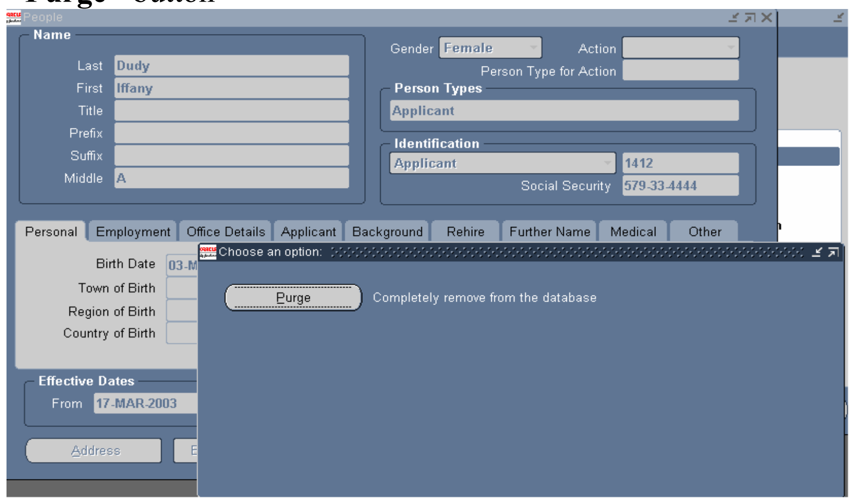
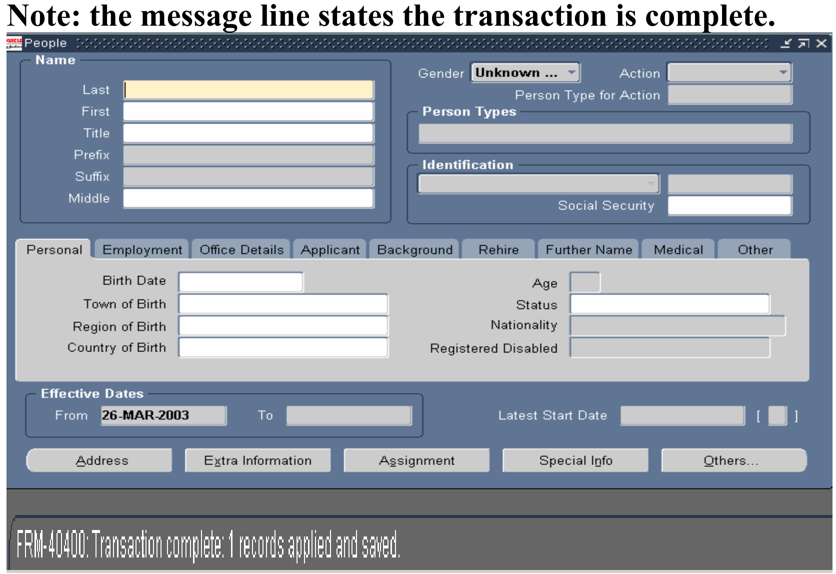


</td></tr>
</table>

Continued on next page

Deleting an Applicant, Continued

Deleting an Applicant (continued)

7	The choice box now only has one choice <Purge> Click the **<Purge>** button 
8	You should see all information on the <People> window is gone/empty of information. Click the **<Save> icon** **Note: the message line states the transaction is complete.** 

Continued on next page

Using Date Track

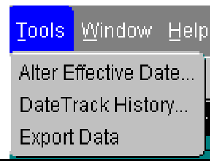
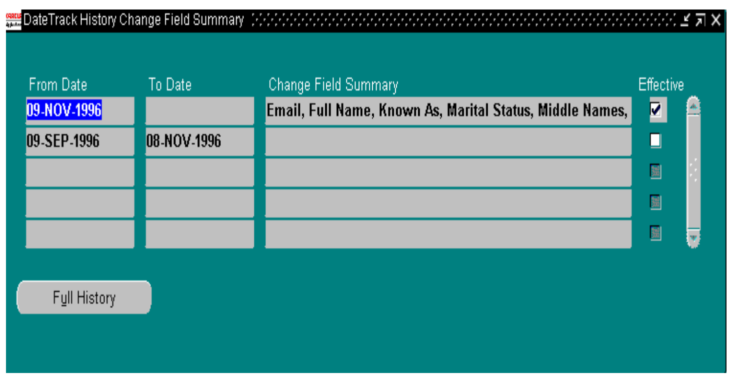
Accessing Date Track

Step	Action
1	From any window that contains "date tracked" information, click on the DateTrack button on your Oracle toolbar. The button is located near the right end of your toolbar, and it looks like this:  Or access DateTrack by using the menu bar commands Tools, Alter Effective Date. Once you perform one of these two actions, DateTrack's Alter Effective Date window will appear.
2	Enter the effective date that you wish to create for your database in the Effective Date field of the Alter Effective Date window and click OK or press Enter. Oracle will exit out of the Alter Effective Date window and return to the original window. The new date will appear in the title bar of the as pictured in the illustration.  Once the effective date is altered, all information entered, changed, or viewed will be treated *as if it were being accessed on that altered date*.

Viewing Date Track History

Date Track History

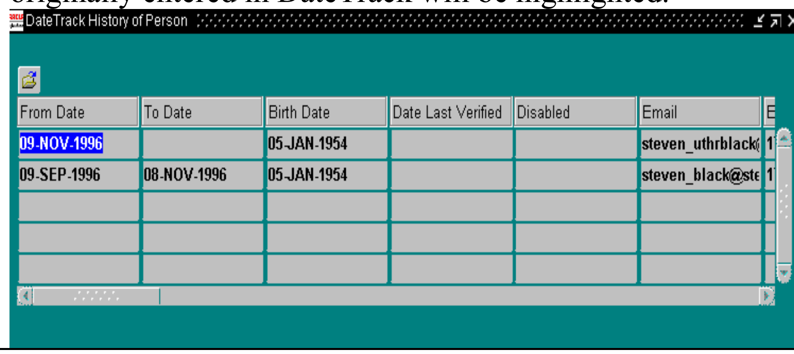
Date Track History shows all of the changes that were made to a date tracked record over time.

Step	Action
1	Click on the DateTrack History icon on far right end of the toolbar.  Or Click <Tools> in the menu bar and select Date Track History. 
2	Each row in the DateTrack History Change Field Summary window shows a field in the record that was changed on the effective date (i.e., the date that is displayed in the From field of the form currently initiated).  Click the <Full History> button in the DateTrack History Change Field Summary window.

Continued on next page

Viewing Date Track History, Continued

Date Track History (Continued)

Step	Action
3	The full history summary of the current record will appear, showing all of the fields and the date(s) when information was changed. The information that corresponds to the effective date originally entered in DateTrack will be highlighted. 
4	To exit out the DateTrack History Change Field Summary and/or DateTrack History of Person window, click on the **X** in the upper right-hand corner of the window. Returning to the original window 

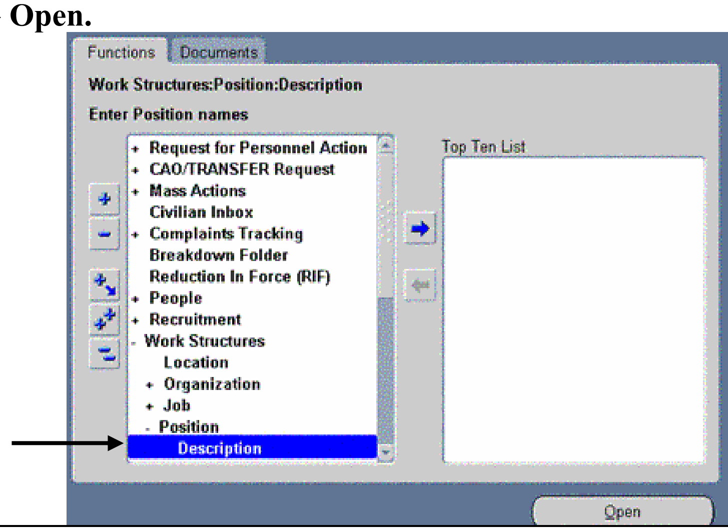
Position Window

Introduction

There are new features to the Position area:

- Position history is now date tracked. It allows you to:
    - Query the position at a certain date,
    - View the past changes made to the position,
    - Make multiple changes on the same day.
        - Correct – Changes back to date the position was established;
        - Update – Changes from this date forward.
- Position ***Type*** on the **Position Details** Tab contains new data:
    - **Single Incumbent** (Defaults to all new positions)
    - **None** (Reflected in converted records – need to be changed to Single Incumbent)
    - **Pooled** (Not currently used)
    - **Shared** (Not currently used)
- On the **Hiring Information** Tab, ***Full Time Equivalent*** (FTE) and ***Headcount*** default to "1." (You can change the FTE for reports.)
- Updatable data fields are yellow and white; gray fields are not used by DoD.
- When you delete positions, the sequence numbers are recycled and are used again.
- ***Position Name*** is now ***Date Effective Name,*** so you can use date tracking and view the position name as of that date.

Accessing the Position Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigation Path, Work Structure → Position → Description → Open.

</td></tr>
</table>

Continued on next page

Position Window, Continued

Accessing the Position Window (continued)

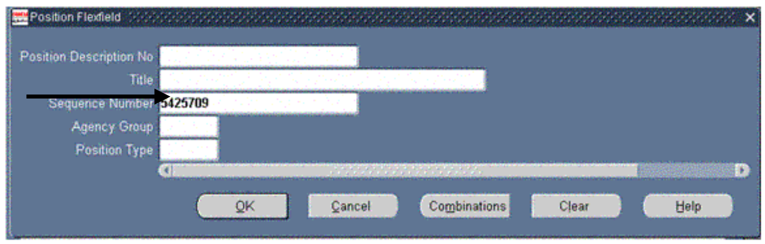
Step	Action
2	The **Find Positions** window opens.  This window is a new feature that provides an easy method to retrieve a blank **Position** window for building a new position, and for querying current positions in the data base. • You can query on any of the data fields associated with the ***Name*** (now ***Date Effective Name***) data fields. • You can use the ***Sequence Number***. You don't have to use the periods to separate data, i.e., **"."**"**PERSONNEL**%" is now just "**PERSONNEL**%." ***Note:*** Do not click the <**Find**> button without entering data in one of the fields. It causes a lengthy delay while the system searches the entire position data base.

Continued on next page

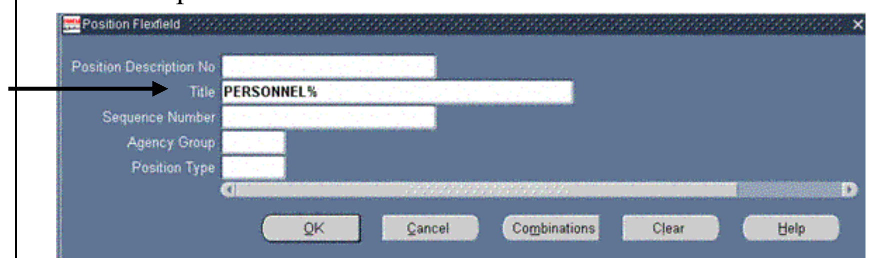
Position Window, Continued

Accessing the Position Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>On the Find Positions window, click in the name data field. All fields should be blank before entering your query, A query can be performed on any of the data fields



</td></tr>
<tr><td>4</td><td>Enter search criteria in an appropriate field followed by a % sign. For example, in the Title data field, enter “PERSONNEL%,” to retrieve all positions with “PERSONNEL” in the Title.



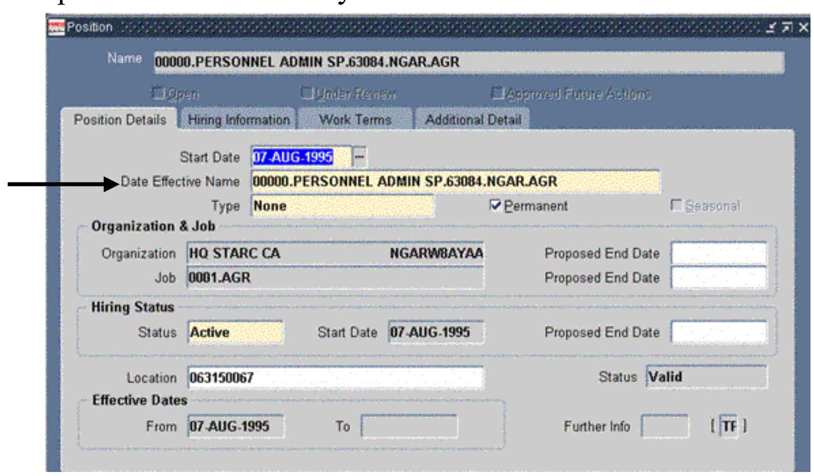
NOTE: The fields are case sensitive. If the Title was built with all caps, you must use all caps when entering the Title information.</td></tr>
</table>

Continued on next page

Position Window, Continued

Accessing the Position Window (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the <OK> button. The Find Positions window opens with the info in the <i>Name</i> data field:

</td></tr>
<tr><td>6</td><td>Click the <Find> button. The Position Window opens with the first position that matches your criteria:


The message bar at the bottom of the window displays “Record: 1/?” indicating there is more than one record. Use the Up and Down Keys to search for the position you need.</td></tr>
</table>

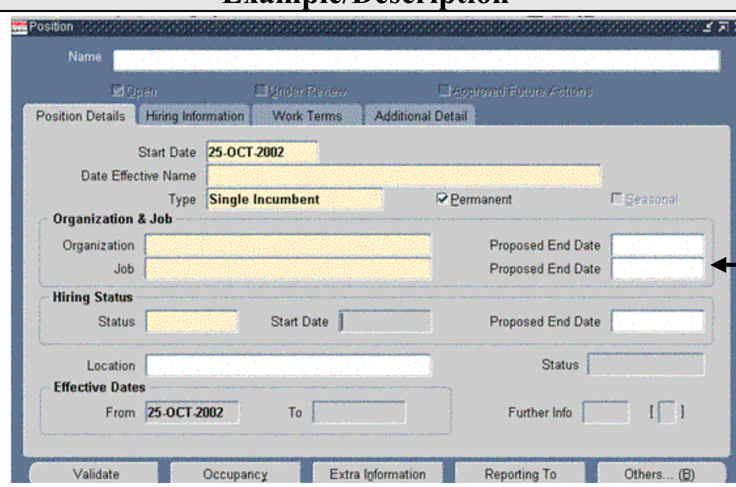
Position Window, Continued

Querying a Current Position

Step	Action
1	If you need to view a current position, or make changes to a current position, you can use the usual query method: 1. Close the **Find Positions** window. The **Position Details** window opens. 2. Press **F11 key** (prior to clicking anywhere on the form), to query the position. 3. Enter the name of the position in the ***Date Effective Name*** data field, for example: ".PERSONNEL%". 4. Press **Ctrl** and **F11 keys** simultaneously. The first position with the query criteria displays. 5. Scroll to the position using the **Up** and **Down** Keys. When the desired **Position** window displays, make the changes on the appropriate tabs. 6. **Validate** and **Save**.

Position Window Description

The **Position Window** opens with the **Position Details** Tab open. Click on the other three tabs to display: **Hiring Information**, **Work Terms**, and **Additional Detail**, which are not being used by components at this time.

Tab	Example/Description
Position Details ***Proposed End Dates*** are Optional	

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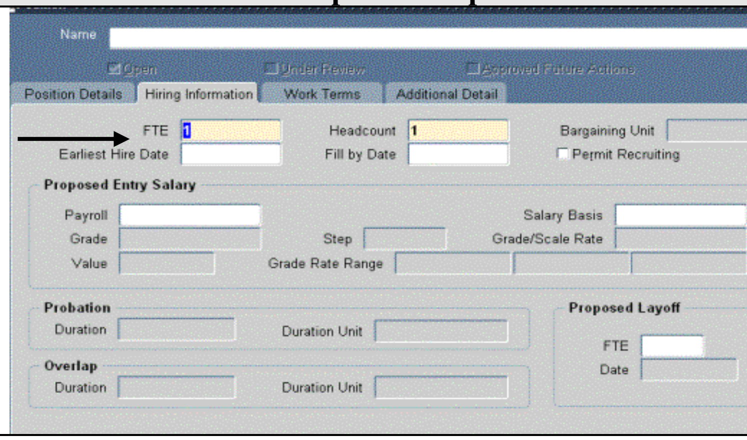
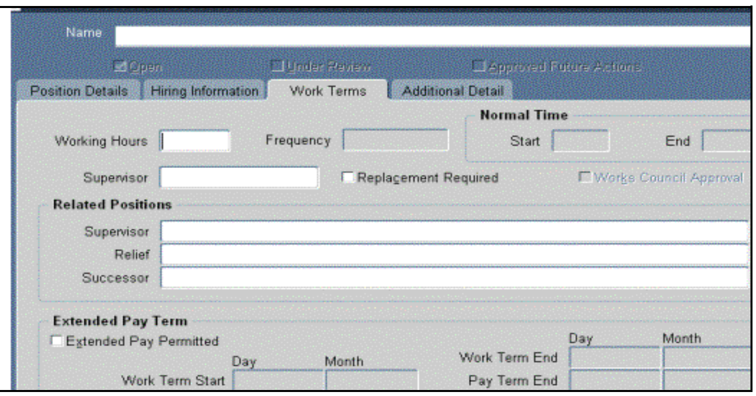
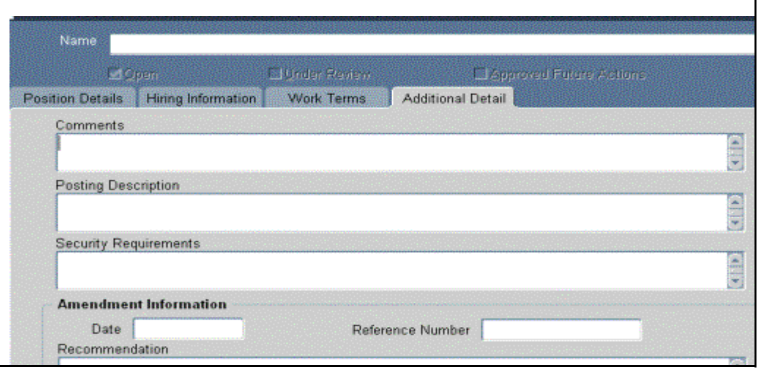
Position Window, Continued

Position Window Description
(continued)

Tab	Example/Description
Hiring Information **(Full Time Equivalent)**	
Work Terms	
Additional Detail	

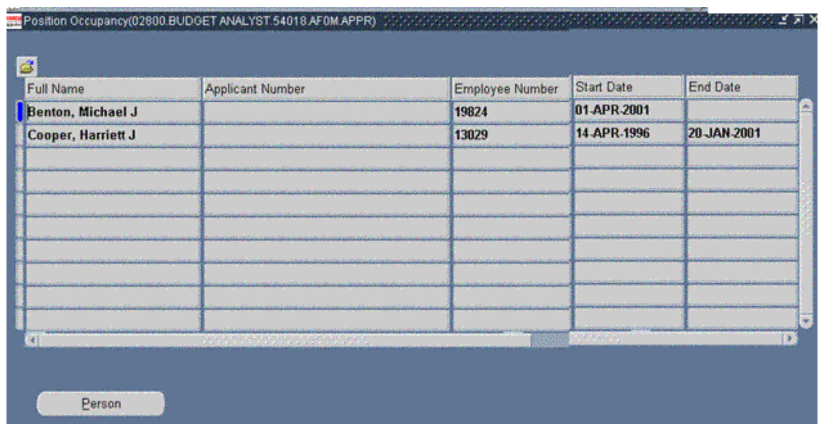
Continued on next page

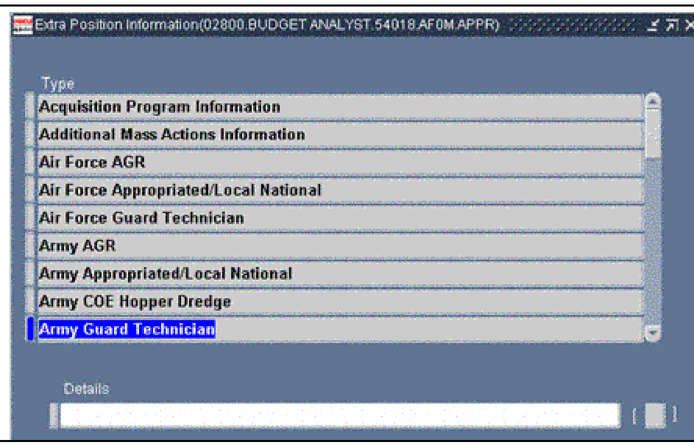
Position Window, Continued

Taskflow Buttons

There are five taskflow buttons on the Position Window:

<table>
<tr><th>Taskflow Button</th><th>Example/Description</th></tr>
<tr><td><Validate></td><td>When you click the Validate taskflow button, the system performs the necessary edit checks and updates the database with the new information.</td></tr>
<tr><td><Occupancy></td><td>Displays the employees who have occupied the position, plus their start and end dates.



If you want to view the employee’s record, you can highlight the name and click the <Person> button at the bottom of the window.</td></tr>
<tr><td><Extra Information></td><td>
</td></tr>
</table>

Continued on next page

Position Window, Continued

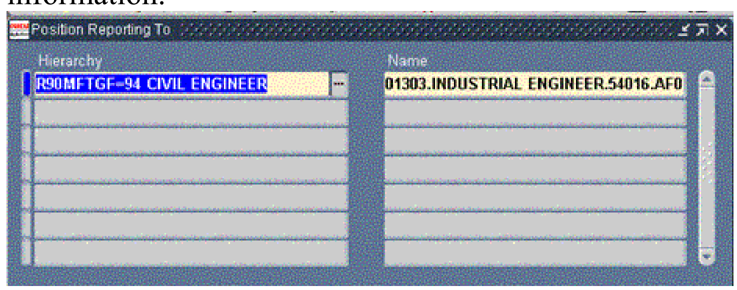
Taskflow Buttons
(continued)

<table>
<tr><th>Taskflow Button</th><th>Example/Description</th></tr>
<tr><td><Extra Information > (Cont)</td><td>

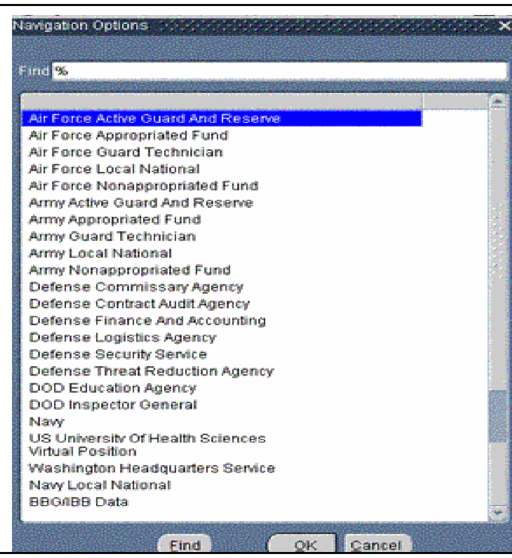
- The fields include the data items required to pass the Central Personnel Data File (CPDF) edits, as well as optional position data items required by each component. The system supplies values from the data base for those data items completed earlier in the position build or by direct data entry.
- To view or enter **Extra Information** data, highlight the **Type** of information and click in the **Details** Field.

</td></tr>
<tr><td><Reporting To></td><td>

This button displays the **Hierarchy** and **Position Name** information.



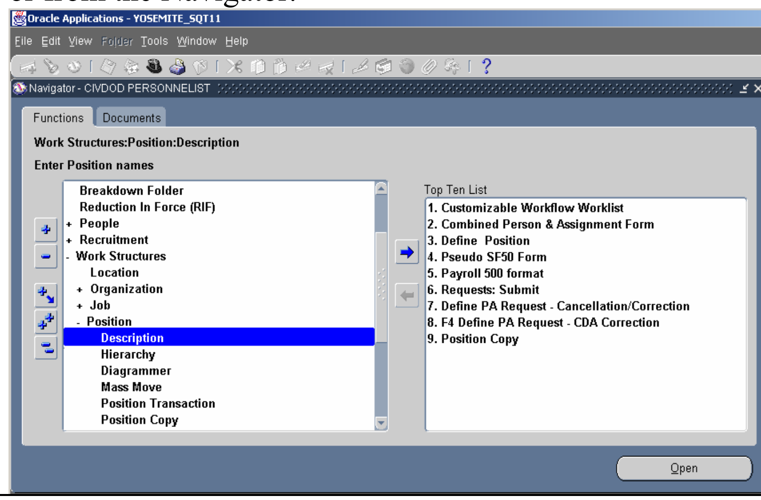
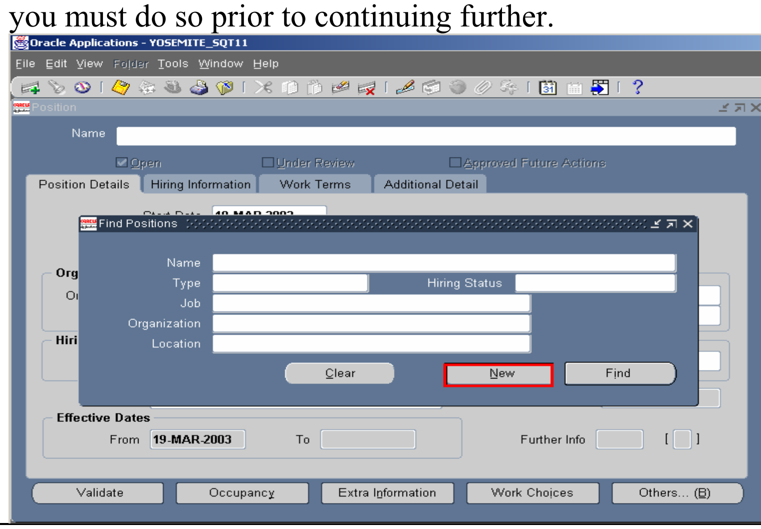
</td></tr>
<tr><td><Others></td><td>



</td></tr>
</table>

Position Window

Building a New Position

Step	Action
1	Navigate to the <**Position**>window either from a Top Ten List or from the Navigator. 
2	The **"FIND"** window appears The start date Defaults to the current Date. If you need to alter the effective date use the calendar to <**date track**> Click the <**New**> button to continue **Note**: If you need to change the effective date of the position you must do so prior to continuing further. 

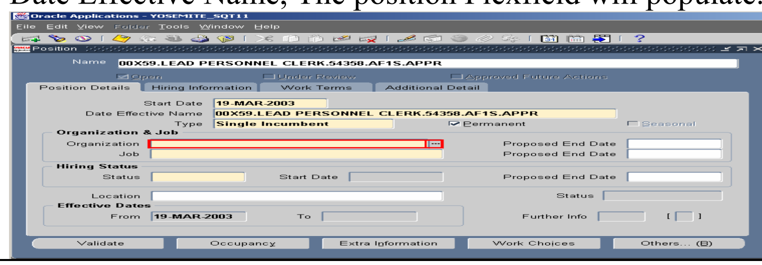
Continued on next page

Position Window

Building a New Position
(Continued)

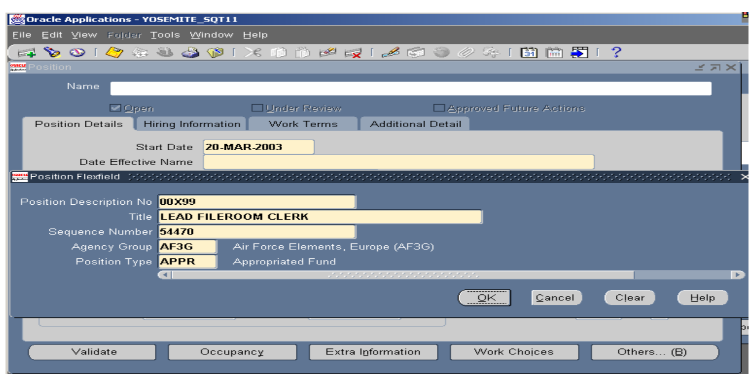
3

Notice the 4 TABS:
<Position> and **<Position Details>** Tabs is where you input the required information. You may also input additional information under the **<Others B>** button
<Hiring Information> TAB (Not USED)
<Additional Detail> TAB (Not USED)
Note: Click from within the Position Details Tab click on the Date Effective Name, The position Flexfield will populate.



4

The Position Flexfield opens. (**This is the same window used to find a position)** Notice in this window all the "required" fields are in Yellow
Note: Some of the OTHER required fields may not be highlighted in Yellow, but they are DoD/Air Force required fields
Click **<Ok>** once all the required fields are complete.



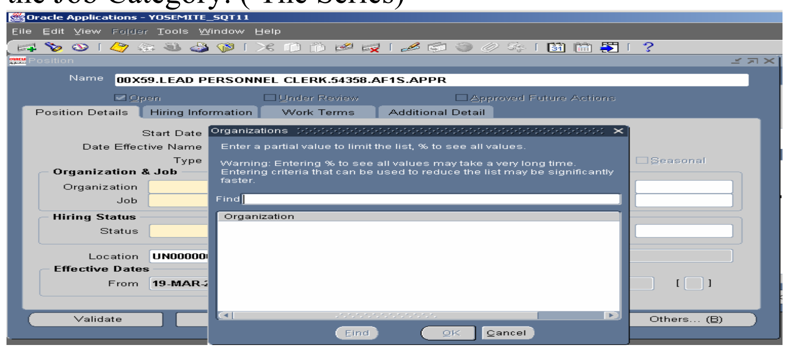
Continued on next page

Position Window

Building a New Position
(Continued)

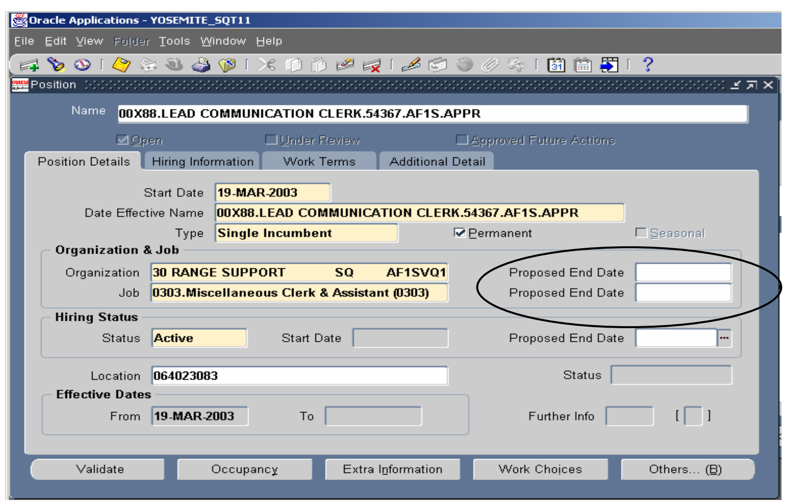
<table>
<tr>
<td>5</td>
<td>

Once you click on the Organization block you will see a drop down Menu. You may search by using a < **%** > then hit TAB to locate the correct Organization or you may use the LOV button and a partial value to limit the results from the list. **Example: 116%** (the wildcard is the % sign)
Once you have located your organization highlight it then click **<ok>** **Note**: You will use the same search process to complete the Job Category. (The Series)



</td>
</tr>
<tr>
<td>6</td>
<td>

Complete the Hiring Status, Verify the location Code
Note: Proposed End Date is **NOT BEING** used



</td>
</tr>
</table>

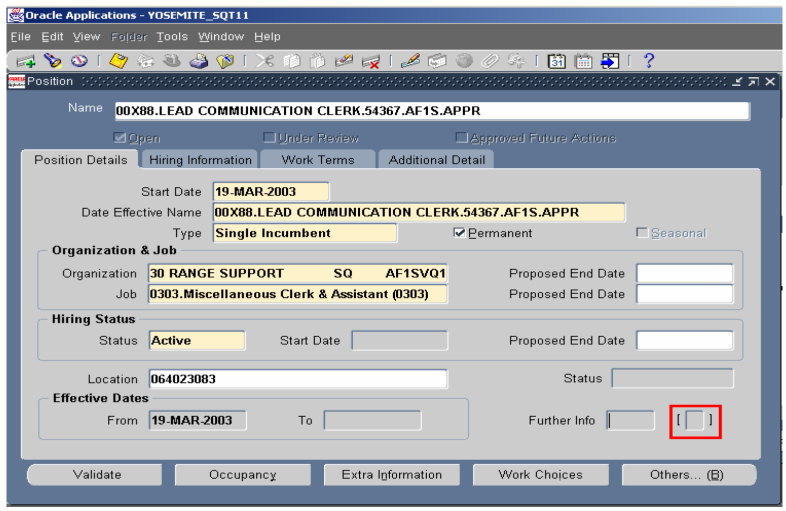
Continued on next page

Position Window

Building a New Position
(Continued)

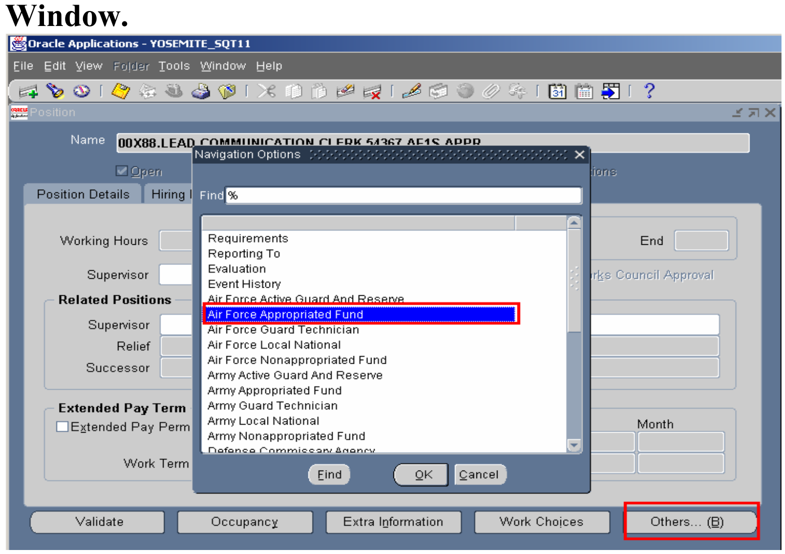
7

Important Note: Don't forget the Additional Position Details Bracket and fill in the required information and click **<OK> Click on <SAVE>** the system will prompt you.



8

Next select <Others (B)> from the Navigation Options Window.

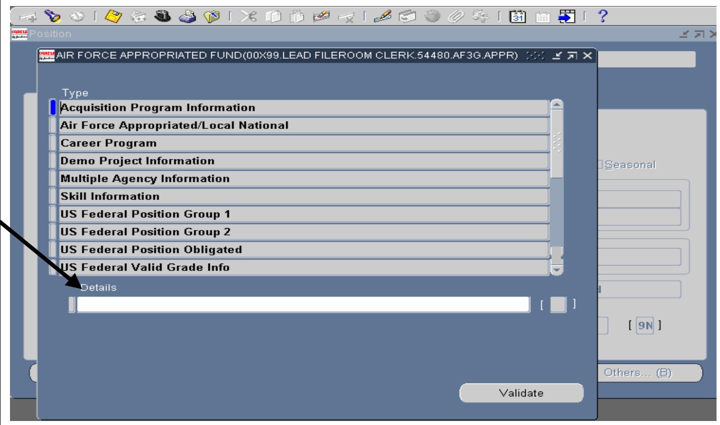


Continued on next page

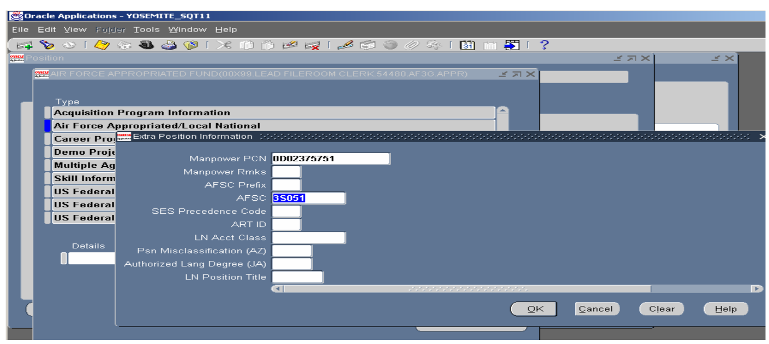
Position Window

Building a New Position
(Continued)

<table>
<tr><td>9</td><td>High light the Flexfields pertinent to your job then click in the <Details> Area



</td></tr>
<tr><td>10</td><td>Complete then click <OK>



</td></tr>
</table>

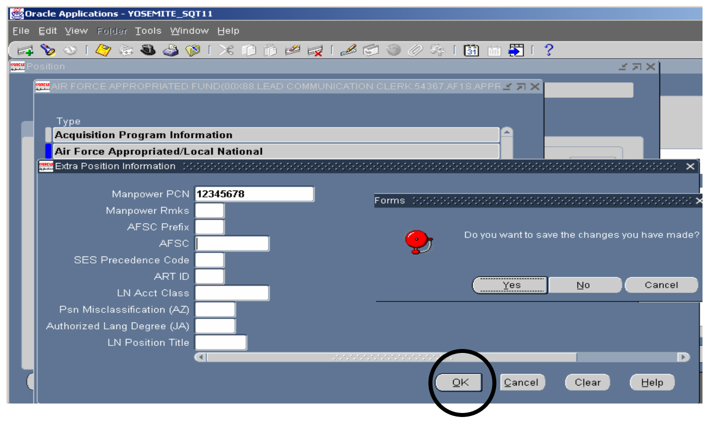
Continued on next page

Position Window

Building a New Position
(Continued)

11

After completing the details of the Extra Position information fields, click **<OK>,** click on the **<Save>** button from the toolbar or the system will prompt you to save.
Continue this process by completing all of the flexfields types pertinent to your position.



12

Once the position is built, the position status will be invalid and the position will need to be validated.
Click on the Validate Button at the bottom of the Position Window screen. When you click the Validate taskflow button, the system performs the necessary edit checks and updates the database with the information
Note: The Status will then change from Invalid to **<VALID>**