

# Colorado State University

## Human Resource Management System User Guide

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Unit 0: Introduction

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Unit 1: HRMS Basics

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Unit 2: DateTracking

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Unit 3: Hiring a New Employee

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Unit 4: Electronic Approvals

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Unit 5: Maintaining Existing Employees

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**Unit 6: Summer Session Appointments**

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Unit 7: Labor Scheduling

---

Unit 8: Time Entry and Timeclocks

---

Unit 9: Performance Evaluation Module

---

Unit 10: Leave Module

---

Unit 11: User Reports

---

Unit 12: Associates

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Appendix

## Unit 6: Summer Session Appointments

Summer Session appointments are used to pay only Faculty, Admin Professionals, Graduate Assistants, and Other Salaried Employees who are either on a 9-month appointment or do not work during the academic year for work performed from May 16 through August 15. Use of a Summer Session appointment during the academic year is not allowed.

**This unit provides instruction on:**

<b>Hiring a New Employee for the Summer Session.....</b>	<b>6.1</b>
<b>Obtaining Summer Session Salary Maxima .....</b>	<b>6.1</b>
<b>Creating a New Concurrent Summer Session Assignment.....</b>	<b>6.2</b>
<b>Reactivating an Existing Summer Session Assignment .....</b>	<b>6.10</b>
<b>Viewing Current Summer Session Appointments .....</b>	<b>6.14</b>
<b>Editing a Summer Session Assignment .....</b>	<b>6.16</b>
<b>Summer Session Encumbrances for the Following Fiscal Year....</b>	<b>6.19</b>

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### ***Hiring a New Employee for the Summer Session***

To hire a new employee (someone without employment records in the HR system) on a Summer Session appointment, please turn to Unit 3: Hiring a New Employee.

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### ***Obtaining Summer Session Salary Maxima***

Summer session earnings are restricted according to the number of summer weeks an employee works. To find out the maximum amount a summer session employee may earn, print a Personnel File Data form - Summer Session as described below.

- 1. Go to Processes and Reports -> Submit Processes and Reports -> Single Request.**
- 2. The the Name field, type 'pers' and press tab. Select Personnel File Data - Summer Session from the LOV that appears.**

3. You may specify an employee, if you wish, by entering the Employee Name, Employee ID #, or Assignment number field.

Or you may print PFDs for all of your 9-month employees at once by changing Summer Appointments Only? to No. Leave all other fields blank except for the Date field which populates automatically.

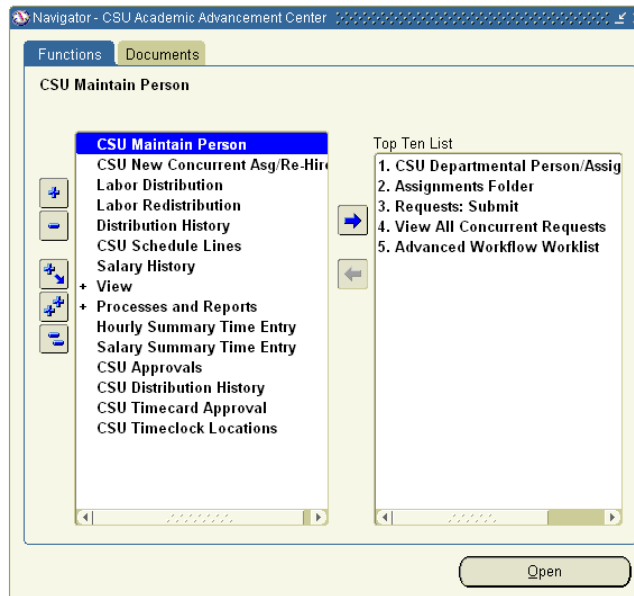
4. Click OK.
5. Click Submit.
6. When the report has completed, click View Output.

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## Creating a New Concurrent Summer Session Assignment

To create a Summer Session assignment for a 9-month employee **who does not have a summer session assignment** in your department for the appropriate people group (ie, faculty or graduate assistant):

1. From the Navigator menu, open CSU New Concurrent Asg/Re-Hire.



2. Enter the Effective Date which is always May 16 of the current year.

CSU Create Secondary Assignment

STEP 1 Fill in the Effective Date

Effective Date: 16may07

STEP 2 Fill in Employee No., CSU Id, or Name and press Search button

Employee No.:

CSU Id:

Full Name:  Search for person

STEP 3 Enter Assignment Info. and press the Create button

Employee Group:   Summer Session

Payroll:

Pay Basis:

Create assignment

3. Enter the employee's last name, employee number, or CSU ID and click the Search for Person button. (If you enter a last name, you may be given a list to choose from.) The remaining fields in Step 2 of this screen will automatically populate.

If the employee cannot be found, he may not be a CSU employee. Refer to the Summer Session section of Unit 3: Hiring a New CSU Employee.

If you are able to find the person, but the Employee No. field does not populate, please contact the Oracle Helpdesk at 491-0946.

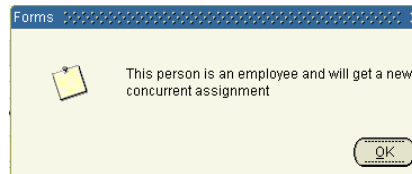
4. In the Employee Group field, enter the group for the new assignment. The Employee Group must match the 9-month assignment, but the Employee Qualifier (such as GTA) may differ.
5. In the Payroll field, enter CSU Monthly.
6. Click the Summer Session checkbox.
7. Click the Create Assignment button.
8. If you're creating a new faculty assignment, the following box will prompt you to choose an employment category. This must match the category on the 9-month assignment.

Employment Category

Please select an Employment Category.

Regular Special Temporary

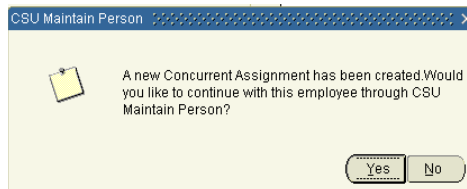
9. If Oracle finds that this employee is active, you will receive the following message. Click OK to continue.



10. When the following window opens, you may:

Click Yes to complete and zoom the new assignment. You'll be taken to this employee's People screen.

Click No to create a new concurrent assignment for another employee. The CSU New Concurrent Asg/Re-Hire will clear so you may create another new concurrent assignment.



11. If you clicked yes, the People screen will open. Verify the Effective Date and change it if necessary.
12. The People window displays the employee's personal information. Verify all biographical information including the tabs, Additional Personal Details Flexfield (beermug), and the Address, Phones, and Special Information buttons at the bottom of the screen.

Any changes you make here change this data for all departments in which the employee holds an active assignment.

If information is added to the Special Info -> Creator Comments or Conditions of Appointment sections, the Start Date of these comments must be the same as the hire date in order for them appear on the approval notification.

If the employee is being paid from a 13 fund, please note in Creator Comments whether this appointment is for teaching, research, or administration. If it is for teaching, include the course number.

13. Click the Assignment button. The Assignment window displays the employee's primary assignment data.

14. Use the down arrow on your keyboard to locate the new concurrent assignment that you just created. Several of the fields will be populated already.

Assignment: 16-MAY-2007(Harvey, Holly)

Organization: Human Development and Family Stud...      Group: Faculty,Non-Federal

Job:      Position:

Grade:      Payroll: CSU Monthly Payroll

Location: GIFRD 141      Status: Active Assignment

Assignment Number: 28336-2

Assignment Category: Regular

Salary Information    Supervisor    Standard Conditions    Statutory Information    Miscellaneous

Salary Basis: Summer Session Salary

Review Salary      Review Performance

Every      Every

Effective Dates

From: 16-MAY-2007      To:

Salary    Entries    Entry History

15. Enter the Job and ensure that the Job and Assignment Category match the 9-month assignment.

16. When the following screen appears, select Correction.

Choose an option:

Update      Keep history of existing information

Correction      Correct existing information

17. Correct the Location if the actual workplace is located off the main campus (i.e., the Engineering Research Center, Denver, or another state). Failure to do so may cause incorrect taxation for the employee.

18. Select the Salary Information tab in the middle of the screen. Ensure that the Salary Basis is set to “Summer Session Salary”.

19. Select the Standard Conditions tab. The Working Hours should always be 40 for a Summer Session assignment.

20. If the employee works during the summer session only (ie, does not have a 9-month assignment), please populate the SS FTE Salary field in the Assignment screen beer mug.

21. Save your work.

22. Do not enter a salary for summer session assignments.

23. Click the Entries button at the bottom of the screen.

24. In the Element Name column, type 'sum' and press Tab to create a Summer Session element.

You'll need one element for each month that the employee works during the summer: May, June, July, and/or August.

**25. Click the Entry Values button. Enter the:**

- SS Appt Amount - the amount to be paid during the period indicated below
- SS Start Date - the first day of the summer session month (ie, 16-May, 1-Aug)
- SS End Date - the last day of the summer session month indicated above (ie, 31-May, 15-Aug)
- Auto Base Pay Update - The Auto Base Pay Update field controls whether the appointment is eligible for a retroactive salary increase. Setting this flag to Y for an appointment will apply the salary increase, which is normally effective on August 16, to summer appointments occurring between May 16 and June 30.

Entry Values: 16-MAY-2005(Ellis, Evan)

SS Appt Amount: 2500.00

SS Start Date: 15-MAY-2005

SS End Date: 31-JUL-2005

Auto Base Pay Update: N

Pay Value:

Amount:

Jurisdiction:

Deduction Processing: All Deductions

Separate Check: No

Future Use 1:

Future Use 2:

Future Use 3:

Future Use 4:

Future Use 5:

Future Use 6:

Further Entry Information:

Date Earned:

Original Date Earned:

Payee Details:

Processing Priority: 1750

Show Adjustment

**26. Save your work and close the Entry Values screen.**

CSU Department Element View: 16-MAY-2005(Ellis, Evan)

Period: 5 2005 Calendar Month (01-MAY-2005)

Classification:

Processing Types:

Recurring

Nonrecurring

Both

Element Name	Processing Type	Costing	Reason		Additional	Effective Dates
						From To
Summer Session	Recurring			.0	<input type="checkbox"/>	16-MAY-2005
Summer Session	Recurring			.0	<input type="checkbox"/>	16-MAY-2005
Summer Session	Recurring			.0	<input type="checkbox"/>	16-MAY-2005
Summer Session	Recurring				<input type="checkbox"/>	16-MAY-2005
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

Additional:

Processed

Retroactive

**27. Close the CSU Department Element View screen.**



28. Click the Zoom button on the toolbar.



29. You may enter Creator Comments and Conditions of Appointment, if needed.

CSU Approval

4682-3 Ellis, Evan 16-May-2007 007450.Associate Professor

Creator Comments

Conditions of Appointment

Press the button below to send this person into the approval process.

Send into Approval Process

30. When the Labor Scheduling window displays, select the Summer Session assignment and click Schedule Lines.

Labor Scheduling

Employee

Full Name: Ellis, Evan

Employee No.: 23008

Distribution Instructions

Assignment No.	Job	Position	Begin	End	FTE	Org. Def.	Assignment	
							Element Group	Element
23008	009980.Gradua		18-APR-2005			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23008.2	009980.Gradua		16-MAY-2005			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Schedule Lines

31. When the following window displays, click Yes.

Decision

Schedule does not exist for the assignment. Create one?

Yes No

32. In the Schedule Hierarchy block, click the round button to the left of Assignment. Save the change.

The screenshot shows the 'Schedule Lines' window with the following fields and sections:

- Employee:** Full Name: Ellis, Evan; Employee No.: 23008
- Assignment:** Assignment: 23008-2; FTE: [ ]; Org.: Academic Advancem; Payroll: Calendar Month; Begin: 16-MAY-2005; End: [ ]
- Schedule Hierarchy:** Radio buttons for Assignment (selected), Element Group, and Element Type. A 'Copy To' button is present.
- Table:** A table with columns: GL Account, Project, Start Date, End Date, %. The table is currently empty.
- Default Account:** [ ] [ ] [ ] [ ]
- Totals:** [ ] [ ] [ ] [ ]
- Buttons:** Refresh Display, Schedule Summary, Monthly Summary, Payroll Period

33. Enter the following information in the bottom half of the window.

- **GL Account**
- **Start Date**
- **%** - percent of the salary to be paid from this account. If the percentage is less than 100 for any period, the remainder of the employee's pay will be charged to the department's default account.

The **End Date** column in Schedule Lines should be left blank unless a new account will replace this account at a known date in the future. End-dating a labor schedule does **not** stop an employee's pay.

34. Save your work.

35. Close the Schedule Lines and Labor Distribution windows to return to the CSU Approval window.

36. When the CSU Approval window appears, click Send into Approval Process again.

37. A window appears to notify you that the person has been sent into the approval process. Click OK. (Please refer to Unit 4: Electronic Approvals for information on the approval process.)

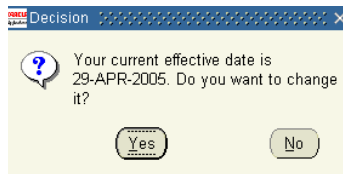
38. Close the Assignment and People windows (or press F4) to return to the Navigator window.

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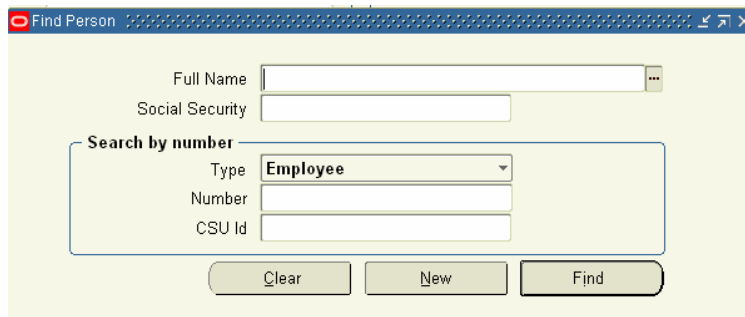
## Reactivating an Existing Summer Session Assignment

If a Summer Session assignment exists from a previous year, it must be reactivated. If the employee's organization has changed, please create a new concurrent assignment according to the previous section.

1. To reactivate the assignment, open CSU Maintain Person from the Navigator menu.
2. When asked if you want to change the effective date, click No. The effective date will be set for you later.



3. In the Find Person window enter the employee's last name, employee number, or CSU ID and click Find.



Unit 6: Summer Session Appointments

- From the People screen, click the Assignment button. Use the up- and down-arrows to locate the summer session assignment in “End Summer Session” status.

Assignment: 22-MAY-2005(Cavett, Cole C)

Organization: Academic Advancement Center | Group: Other Salaried Employee.Non-Federal  
 Job: 009930.Clinical Psychology Inter | Position:   
 Grade:   
 Location: GIBNS 117 | Payroll: CSU Monthly Payroll  
 Status: End Summer Session

Assignment Number: 22826-3  
 Assignment Category: Temporary

Salary Information | Supervisor | Standard Conditions | Statutory Information | Miscellaneous

Salary Basis: Summer Session Salary

Review Salary: Every [ ] [ ] | Review Performance: Every [ ] [ ]

Effective Dates: From 01-SEP-2004 To [ ] [ ]

Salary | Entries | Entry History | Statement of Earni...

- Click the Zoom button to access the CSU Assignment Changes screen.



- The form automatically sets the effective date to May 16 of the current year.

CSU Summer Session Changes (4682-2 - Jeffs, Jay F)

Effective Date: 16-MAY-2007 | 4682-2 Jeffs, Jay F

Organization: Foreign Languages and Literatures | 1774 | Location: C104 Clark  
 People Group: Faculty | Qualifier: Non-Federal  
 Job: 007450 | Associate Professor | Status: Active Assignment  
 Basis of Service: Summer Session | Employment Category: Regular

Summer Session Earnings	Start Date	End Date	Amount	ABPU?	Delete?
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	
				<input type="checkbox"/>	

Creator Comments: [ ]

Funding: Account	Description	Start Date	End Date	Percent
133160	DEPARTMENTAL ACADEMIC ADMINISTRATION	16-MAY-2004	15-AUG-2004	.00

Update | Send into Approval Process

7. The Status field automatically updates to Active Assignment. The Assignment Changes form also updates the People Group, Qualifier, Job, and Employment Category fields to match the 9-month assignment. For Graduate Assistants, the Qualifier may differ from the 9-month assignment.
8. In the Summer Sessions Earnings section, you may enter up to seven appointments. Enter the following information.
  - Start Date
  - End Date
  - Appt Amount - This amount will be evenly distributed over the working days of this appointment.
  - ABPU (Auto Base Pay Update) - Check this box if this appointment is eligible to receive a retroactive salary increase, normally effective July 1.

Effective Date: 16-MAY-2007 4682-2 Jeffs, Jay F

Organization: Foreign Languages and Literature 1774 Location: C104 Clark

People Group: Faculty Qualifier: Non-Federal

Job: 007450 Associate Professor Status: Active Assignment

Basis of Service: Summer Session Employment Category: Regular

Summer Session Earnings	Start Date	End Date	Amount	ABPU?	Delete?
* 01-JUN-2007	* 30-JUN-2007	* \$1,200.00	<input type="checkbox"/>	<input type="checkbox"/>	
* 01-JUL-2007	* 15-AUG-2007	* \$1,300.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
* 01-AUG-2007	* 15-AUG-2007	* \$600.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

Creator Comments: This appointment is for administrative purposes.

Funding: Account	Description	Start Date	End Date	Percent
133160	DEPARTMENTAL ACADEMIC ADMINISTRATION	16-MAY-2004	15-AUG-2004	.00

Update

Send into Approval Process

9. If the employee is being paid from a 13 fund, please note in Creator Comments whether this appointment is for teaching, research, or administration. If it is for teaching, include the course number.
10. Review the account information in the Funding section. Click the Update button if this information is out of date. You'll be taken to the Labor Distribution screen. Please refer to Unit 7 for additional information.

11. Choose the summer session assignment and then click Schedule Lines. Edit the funding as necessary.

**In order for an employee to be paid correctly on a reactivated summer session assignment, THE START DATE MUST BE MAY 1 OF THE CURRENT YEAR!**

**A Start Date of May 1 will not cause the employee to be overpaid. But a Start Date of May 16 will cause half of the employee's May pay to be charged to the department's default account.**

12. If you would like for this employee's summer salary to encumber for the following summer session, leave the end date blank. If you do not want to see estimated encumbrances for the following May and June, enter and end date of 31-Aug of the current year.

Employee

Full Name: Jeffs, Jay F  
Employee No.: 4682

Assignment

Assignment: 4682-2 FTE:   
Org: Foreign Languages a Payroll: Calendar Month  
Begin: 16-MAY-2004 End:   
Status: End Summer Session

Schedule Hierarchy

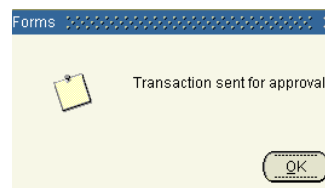
Assignment   
 Element Group   
 Element Type

GL Account	Project	Start Date	End Date	%
133160		16-MAY-2004	15-AUG-2004	0
133162		01-MAY-2007	31-AUG-2007	100

Default Account:

Totals:

13. Save your changes.
14. Close the Schedule Lines and Labor Scheduling screens.
15. After reviewing the changes, you may print this window by selecting File > Print.
16. Click Send into Approval Process.
17. Click OK when the following window appears.

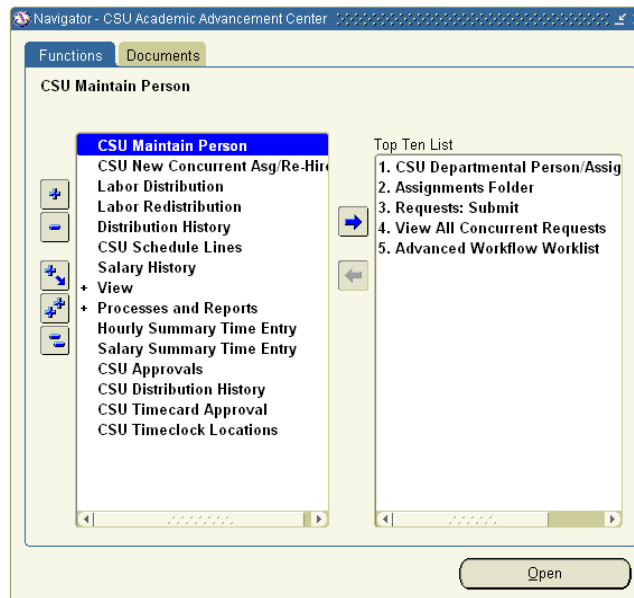
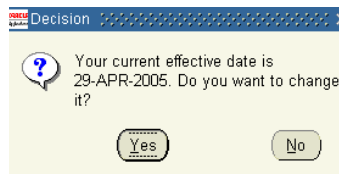
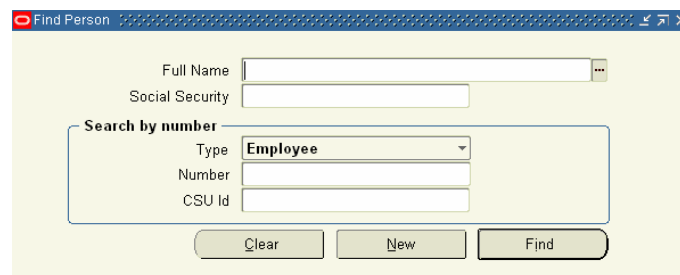


**18. Close the CSU Assignment Changes screen.**

When a change to an employee's assignment is awaiting approval, no other changes can be made until it has been approved or rejected. If you try to access the CSU Assignment Changes screen while there is a change pending, the message "Assignment has active workflow" will appear.

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## *Viewing Current Summer Session Appointments*

**1. From the Navigator menu, open CSU Maintain Person.****2. Set the effective date to May 16 or later.****3. In the Find Person window enter the employee's last name, employee number, or CSU ID and click Find.**

4. Click the Assignment button.
5. When the Assignment screen opens, select the Summer Session assignment using the up- and down-arrows.
6. Click the Entry History button.
7. In the Classification field, type 'ea' and hit tab. Earnings will fill in.

View Element Entry History for Employee: 29-APR-2005(Cavett, Cole C)

Classification:

From:  To:

Processing Types:

- Recurring
- Ngnrecurring
- Both

Effective Dates		Element Name	Entry Type	Costing	Reason
From	To				

8. Leave the From field blank. In the To field, make sure the date is set to May 16 of the current year or later.
9. Place your cursor in the Element Name field and press ctrl-F11. A list of current and past Summer Session Earnings Elements displays.

View Element Entry History for Employee: 29-APR-2005(Cavett, Cole C)

Classification:

From:  To:

Processing Types:

- Recurring
- Ngnrecurring
- Both

Effective Dates		Element Name	Entry Type	Costing	Reason
From	To				
16-MAY-2005		Summer Session	Element Entry		
16-MAY-2005		Summer Session	Element Entry		
16-MAY-2005		Summer Session	Element Entry		

Entry Values



10. To view the details of an appointment, select it and then click **Entry Values**.

If the employee has more than one appointment, you may scroll through them without closing the following screen by using the up- and down-arrows.

The screenshot shows a window titled "Entry Values: 29-APR-2005(Cavett, Cole C)". The form contains the following fields:

- SS Appt Amount: 1200.00
- SS Start Date: 01-JUN-2005
- SS End Date: 30-JUN-2005
- Auto Base Pay Update: N
- Pay Value: (empty)
- Amount: (empty)
- Jurisdiction: (empty)
- Deduction Processing: All Deductions
- Separate Check: No
- Future Use 1: (empty)
- Future Use 2: (empty)
- Future Use 3: (empty)
- Future Use 4: (empty)
- Future Use 5: (empty)
- Future Use 6: (empty)

## Editing a Summer Session Assignment

Changes to summer session assignments are described below. These instructions apply to all active summer assignments.

Any new hires for the summer session which start on any other day must be changed using a Personnel File Data form.

1. From the Navigator menu, open **CSU Maintain Person**.

The screenshot shows a window titled "Navigator - CSU Academic Advancement Center". The "Functions" tab is active, and the "CSU Maintain Person" menu is open. The menu items are:

- CSU Maintain Person (highlighted)
- CSU New Concurrent Asg/Re-Hire
- Labor Distribution
- Labor Redistribution
- Distribution History
- CSU Schedule Lines
- Salary History
- + View
- + Processes and Reports
- Hourly Summary Time Entry
- Salary Summary Time Entry
- CSU Approvals
- CSU Distribution History
- CSU Timecard Approval
- CSU Timeclock Locations

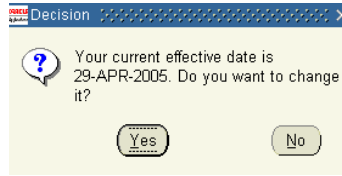
On the right side, there is a "Top Ten List" with the following items:

1. CSU Departmental Person/Assig
2. Assignments Folder
3. Requests: Submit
4. View All Concurrent Requests
5. Advanced Workflow Worklist

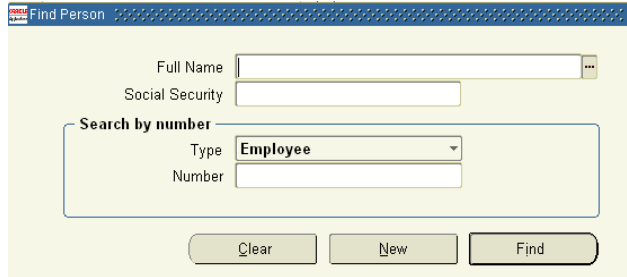
An "Open" button is located at the bottom right of the window.

Unit 6: Summer Session Appointments

- When asked if you want to change the effective date, click No. It will be set for you later.



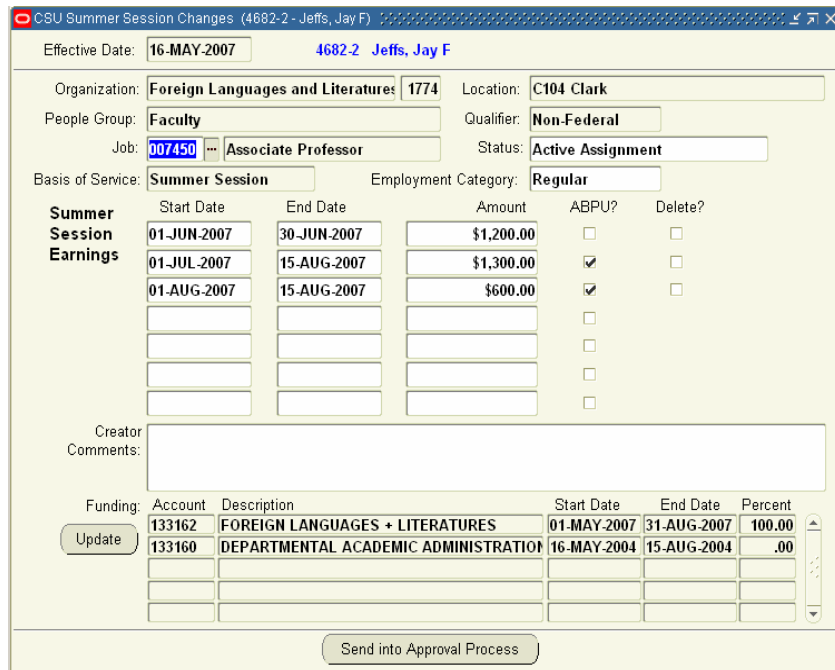
- In the Find Person window enter the employee's last name, employee number, or CSU ID and click Find.



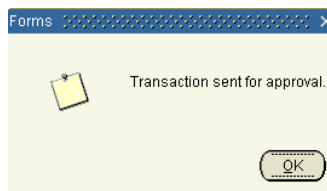
- Click the Assignment button.
- When the Assignment screen opens, find the Summer Session assignment using the up- and down-arrows.
- Click the Zoom button to open CSU Assignment Changes.



- The current information displays.



8. **You may make the following changes to a Summer Session assignment. Please refer to step 9 for additional information on certain situations.**
  - **Add an appointment** - Enter the information for a new appointment on the first blank line in the Summer Session Earnings section.
  - **Delete an appointment** - Check the Delete? box beside the appointment you want to delete.
  - **Edit an appointment** - Change the Start Date, End Date, Amount, or ABPU flag on any existing appointment. If this is a retroactive change, make a note of it in Creator Comments.
9. **Changes such as the following must be made in the manner described:**
  - **Increase or reduce the amount of an appointment BEFORE it has been processed by Payroll** - Edit the Amount field on the Assignment Change form.
  - **Increase the amount of an appointment AFTER it has been processed by Payroll when the amount is to be paid over the remainder of the appointment** - Create a new appointment for the additional amount to be paid using the same dates as the original appointment.
  - **Increase the amount of an appointment AFTER it has been processed by Payroll when the amount is to be paid over the entire appointment** - Edit the appointment amount on the Assignment Changes screen and include an explanation in Creator Comments.
  - **Reduce the amount of an appointment AFTER it has been processed by Payroll** - Edit the appointment amount on the Assignment Changes screen and include an explanation in Creator Comments.
10. **Enter any necessary Creator Comments (required for retroactive changes to pay).**
11. **Click Send into Approval Process.**
12. **When the following window opens, click OK.**



13. **Close the CSU Assignment Changes screen.**

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***Summer Session Encumbrances for the Following Fiscal Year***

HR users now have the option of allowing summer session encumbrances to calculate for the following May and June to assist in financial planning.

If the employee's summer session assignment has active funding through the end of the fiscal year, encumbrances will calculate based on the %FTE paid during the previous fiscal year's May and June. The charges will be applied to the active account(s) on the labor schedule.

To prevent encumbrances from calculating, simply end-date the funding effective August 31.