

Exercises—Basics

Use Firefox browser and enter the URL <https://qual.its.utexas.edu/hrmsd>

Exercise 1: Left Navigation

1a: Find your DEFINE inbox

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

1b: Locate and navigate online Help

1. Click the link to *HRMS Help*.
2. View Help Index.
3. Click *View all Contents*.
4. Click the *Resources* link at the bottom of the index.
5. View resources available.
6. Close the Help window.

1c: View your HRMS Roles

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

1d: Rate Calculators

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

1e: Other Resources

1. Click *Human Resource Services*.
2. View the HRS Web site.
3. Click the *Back* button in your browser window.
4. Click *Account Balances*.
5. View the Web site with links to helpful online reporting tools.
6. Click the *Back* button.
7. Click *Job Code System*.
8. View the Austin Official Pay Plan Web site.
9. Click the *Back* button.
10. Click *Job Search*.
11. View the campus Job Search Web site.
12. Click the *Back* button.

Exercise 2: Home Page

2a: View your last 10 HRMS documents

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

2b: View the last 10 HRMS documents created in a unit

1. In the text box, enter your unit code, or use the lookup tool to find the unit code if needed.
2. Click *Go*.
3. On the resulting list, note that you can navigate to the document by clicking the link to the document ID.

Exercises—Basics

Exercise 3: Quick Search

3a: Search by Unit Code

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

3b: Search by EID

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

Exercise 4: Position Views/Straight Updates

4a: Browse Positions/Position Details

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

4b: Incumbent View

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

4c: Funding View

1. Click the **Funding** tab.
2. View funding for your position.
3. Can any straight updates be made on this view? _____

4d: History View

1. Click the **History** tab.
2. View history for your position back to November 2008.

Exercises—Basics

Exercise 5: Employee tab

5a: View employee profile, history and authorizations

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

Exercise 6: Recruiting tab

6a: Search recruiting efforts (optional – user must have JZ8 authorization)

1. Note searching options – by posting number or document ID.
2. Enter unit code in the second text field.
3. On the resulting list, note links to the Recruiting Summary, Job Title and Posting Number.

Exercise 7: Search tab

7a: Search Positions

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

7b: Search Documents

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

Exercises—Basics

Optional Scenarios

1. You want to see the balance of an account. Where can you get that information?
2. You want to see employee history for someone in your unit. How would you go about doing this?
3. You created a document last week, but can't remember the document ID. How can you find it?
4. You need to change the office location and direct reports to for an employee. How would you accomplish this?
5. You want to see funding for your position. How will you find that information?
6. You want a listing of all student assistant positions (Job Code 0074) in your unit. How would you get that list?
7. You want a listing of just the JZ8 documents you have created. How would you get that list?
8. You want to see a list of all the vacant positions in your unit. How would you find that information?
9. You need a listing of all employees who report to you, along with their position data. How will you get that list?