Manager Self Service – Job Data
Quick Reference Guide

May 1, 2012
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JOB DATA INITIATOR

WHO CAN ACCESS THE JOB DATA REQUEST DOCUMENT

Each workflow document requires a minimum of two participants: an Initiator and an Approver.

Systems Control will be included as an approver for these transactions. They will be the final approval on these transactions prior to the data entering the system.

Initiating or creating a document requires either one of these roles:

- Position Cross-Reference access

Documents require between one and six approvers:

- Business Approvers
  - HR Department
  - College Reviewer
  - College Approvers
    - College/Division Approver
    - College Flex
- Executive/Administrative Approvers
  - Executive Approval
  - Provost
  - UA Central HR
  - Systems Control

College/Divisions determine the number of approval steps required.
HOW TO NAVIGATE TO THE JOB DATA REQUEST DOCUMENT

The Job Data Request Document is located in UAccess Employee – www.uaccess.arizona.edu

To access the document:
1. Click on the Manager Self Service menu item
2. Click on MSS Online Forms
3. Click on Employment and Job
4. Click on Request Employment/Job Changes
INITIATING REQUESTS

The “Online Job Data Change” page allows the user to:

- **Change a Position Assignment**
  - This option requires a Position Number change and includes:
    - Internal Transfers within a department
    - Shifts within Student Groups A-D
    - Modifications to job attributes in conjunction with changes listed above
  - This action replaces the existing position number on the empl record selected

- **Modify Job Attributes**
  - The Position Number cannot be changed in this option. Field values available for update include:
    - FTE
    - Pay Rate
    - Expected End Date Change/Extensions
    - Contract Status (appointed only)
  - This choice allows changes to multiple job attributes on an existing position.

- **Position Life Cycles**
  - The Position and Department Number cannot be changed in this option.
  - A Job Title change is required for this action
  - This selection is used for Promotions within the same department.
  - Not available for Student's Groups A-D

External department transfers, Graduate positions, additional jobs, supplemental compensation changes and leaves of absence will continue to require the submittal of hard copy Personnel Action Forms (PAFs) or Notice of Appointment/Reappointments.
**HOW TO CREATE A NEW JOB DATA CHANGE REQUEST**

To start the process for initiating a Job Change Action:

Select “Job Data Change – New” from the “Transaction Type” dropdown list.

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**SEARCH MATCH**

Enter the Employee information to perform a Search Match.

Click the “Search” Button to start Search Match.
A list of names meeting the search criteria will display below the “Request Employment/Job Changes” box if a perfect match is not found.

**NO RESULTS**
If the criteria entered does not match an existing employee record in the system, the search results box will not return any values as displayed.
Re-enter the employee information to perform new search.

**SEARCH RESULTS**

If a person matches, click the “EmplID” hyperlink to modify the selected employee’s job record.

Otherwise, click the “Clear” button to perform a new search.

**POSITION ASSIGNMENT CHANGE**

***Field descriptions, and standard features and functions such as links and buttons contained in this section may also apply to “Modify Job Attributes” and “Position Life Cycle” transactions.***

To submit internal transfers within a department, shifts within Student Groups A-D, or to modify job attributes in conjunction with the previously listed changes—click on the “Position/Assignment Change” radio button.
A warning is displayed when the “Position/Assignment Change” option is selected to warn the user that the existing position number will be replaced with the position number entered.

Select one of the jobs to replace with a new position number.
Enter the Position Number that will replace the Position in the Empl Rcd/Job selected above. The magnifying glass can be used to lookup vacant or pool positions.

### 1. JOBS SELECTED FOR CHANGE - HEADER

#### Requested Action
The “Requested Action” field displays the action selected on the “Online Job Data Change” page. Field value updates are based on the action selected; therefore, this may explain why some fields are not available on the form.

#### Effective Date
The Effective Date on the “Position Assignment Change Request” page automatically defaults to the beginning of the current pay period. This is a required field and can be changed to reflect future dates up to 30-days in advance. Enter the transaction effective date if different than the populated value. Retroactive dates will require special instructions from Systems Control.

#### Primary/Home Dept
The Primary/Home Dept is an updateable value on this form, and is also available for updating in the Personal Information and UA Title Management forms.

#### Modification Comparison Link
The “Modification Comparison Link” is not available until the form is saved or submitted. This field will display current and proposed values—the functionality is similar to that of other MSS forms.

**Other Links**
Links are available to navigate to other MSS forms.

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**2. SELECTED JOBS**

**Title Attributes**
The Job and UA Titles displayed in the “Selected Jobs” section of the “Job/s selected for Change” page are view only fields and cannot be updated. Users have the ability to change the “Alternate Title” in this section. The Alternate Title appears on the employee’s time sheet and can be different than the UA or Job Titles.

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**3. POSITION JOB ATTRIBUTES**

**Job FTE**
The employee’s current “Job FTE” is displayed and is available for updating.

**Retro FTE**
The “Retro FTE” must be selected to enter an effective date in the “Header” section of this page that goes beyond two pay periods in the past.
**Expected End Date (EED)**
The EED field is pre-populated with the current value in the employee's position but can be updated. If an EED is added or deleted the EED Action Reason will appear as an updateable field and will be required.

**Position Type Code**
The “Position Type Code” field will only appear if the position entered for the employee is Classified Staff.

**Class Indc**
The Class Indicator field, which drives object codes and ERE rates, is filled with the current value in the position selected—and, it is available for updating.

**Benefits Information**
The Benefits Eligibility information pre-populates with the employee’s current benefits status; however, the user has the ability to change it. Changes will be routed to Central HR.

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### 4. COMPENSATION CHANGES

The fields in the Compensation section of “Position Assignment Changes” default to blanks and require users to update the information.

**Institutional Base Rate**
The Institutional Base Rate is displayed before (Actual) and after (Proposed) the Comp Rate is changed.
Rate Code
When the rate code is selected from the dropdown list, the Comp Rate will automatically prefill will the old salary/wage rate.

Compensation Change Options
Three options are available for changing compensation, the user can enter either the Compensation Rate, Change Amount or the Change Percent, and an auto-calculation and field update will be performed for the two remaining fields.

Reason for Compensation Change
The reason for the compensation change must be selected before the compensation change options are available for updating.

Adding Multiple Compensation Rows
Users can click the “+” sign to add or the “-” (minus) sign to remove compensation rows for transactions such as components of pay where a base pay amount is listed in one row and the Component of Pay is listed in another. Additionally, “Allow Multiple Salary Lines” is available for SAL and SAL9 Rate Codes and can be used to capture more than one increase type for the same effective dated period, i.e. a market increase of $1,000 and a merit increase of $2,000.

Pay Range Link
The Pay Range link displays the minimum, midpoint and maximum of a the paygrade for Classified Staff jobs.

Confirm Compensation
The Confirm Compensation button must be clicked once the “Compensation” section is complete.

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**5. OTHER JOBS NOT SELECTED**

Information related to multiple jobs held by an employee, but not selected for a change, will appear in this section.
6. ATTACHMENTS

Attachments may be required based on specific field value changes and associated business rules.

Initiators and Approvers may upload and remove attachments to and from request while the transaction is pending. Attachments for Job Data Change requests can only be viewed by anyone who has access as an initiator or approver for the transaction. Once the transaction has been approved the documents are no longer available for viewing. This is due to the sensitive nature of the Visa documents.

To Add an Attachment:
1. Click the “Add Attachment” link.
2. Click the “Browse” button and navigate to your saved document for uploading. Select the document.
3. Once the document path has loaded, click “Upload”.
4. The document will display with the description and document extension type.

To View an Attachment:
1. Click the link in the “View Attachment” column for the document you wish to view.
2. The document will open up in a separate window.

To Delete an Attachment:
1. Select the radio button next to the attachment you want to remove.
2. Click the “Delete Attachment” link.
3. A confirmation message will say “Attachment Deleted Successfully.”
7. COMMENTS

Comments and attachments are available in all MSS requests. Business rules will determine if the comment field is required for specific transactions.

8. RETURN TO SEARCH

Navigates back to the initial “Request Employment/Job Changes” page and changes will not be saved.
9. SAVE FOR LATER

Allows the user to save the transaction and retrieve it later by selecting the “Job Data Change – Return to work in progress” from the dropdown “Transaction Type” list in the initial “Request Employment/Job Changes” page.

10. SUBMITTING JOB DATA CHANGE REQUEST FOR APPROVAL

The Submit button finalizes the transaction and sends it to the first path in the workflow.
To submit the Job Data Change request for approval.

1. Click on the “Submit” button

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11. EXIT

The request can be cancelled by clicking on the “Exit” button.

**HOW TO MODIFY JOB ATTRIBUTES**

***See the “Position Assignment Change” section for descriptions of standard features, functions and fields.***

Click on the “Modify Job Attributes” radio button to change one or more of the following job attribute(s) without changing the position number on the employee’s job record:

- FTE
- Pay Rate
- Expected End Date
- Contract Status (appointed only)
1. SELECT JOB TO MODIFY

2. SELECTED JOBS SECTION

Alternate Title
Users have the ability to change the “Alternate Title” in this section. The Alternate Title appears on the employee’s time sheet and can be different than the UA or Job Titles.
**Title Contract Status (Faculty/Appointed)**
To change an employee's title contract status, select the appropriate value from the dropdown list. The list will only display for employees with faculty and appointed job titles based on the ABOR code.

**Granted Date**
To change the “Tenure or Continuing” granted date, enter the new value in a mm/dd/yyyy format.

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**POSITION LIFE CYCLE CHANGE**

***See the “Position Assignment Change” section for descriptions of standard features, functions and fields.***

New position numbers are not required for changes where the overall position assignment and organizational structure remain the same. Position Life Cycles are Title Changes that are initiated as a result of other actions such as promotions, movement along a ladder series or track, Classified Staff reclassifications, etc.

To submit a change in an employee’s job title within the same department and position number—click on the “Position Life Cycle” radio button.

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![Mosaic - Human Capital Management Manager Self Service](image_url)
Only one job may be selected for the Position Life Cycle action.

**SELECTED JOBS SECTION**

Enter or use the magnifying glass to update the UA and Job Title fields—changing the titles is a requirement of this action. All the other attributes are the same as the Modify Job Data actions.
APPROVING/DENYING REQUESTS

HOW TO APPROVE JOB DATA CHANGE REQUESTS

Job Data Change requests pending approval can either be accessed through the “pagelet” or the “Manage Job Changes” page. The option to approve a request will only appear if the user has both the appropriate approval role and is the next step in the approval chain.

1. APPROVING JOB DATA CHANGE REQUEST

   To approve a Job Data Change request
   - Click on the “Approve” button
2. CONFIRMING APPROVED REQUEST

Once the Job Data request is approved, a confirmation page displays the information from the previous page in view only mode. The “green box” in the process monitor (the rectangular boxes on the bottom of the page) shows that the first approval step has been satisfied.

1. Click on the “Exit” button to return to the search menu.

3. ADDING AD HOC APPROVERS AND REVIEWERS

Ad hoc approvers and reviewers can be added by HR Department, College Reviewers and College Approvers at any step following an approval step in the chain. For example, the HR Department can add an ad hoc approver or reviewer after the College Reviewer or College Approver steps. Note: the Ad hoc “Approver” will stop the routing flow until the user takes action—the Ad hoc “Reviewer” notifies the user of the transaction and does not require approval.

To add an ad hoc approver or reviewer:

1. Click on the + sign to the right of the approval step the ad hoc step will follow.
   - Do NOT add an AHDOC APPROVER after the Systems Control Step. Systems Control is the final step in the workflow and will deny requests that include an adhoc APPROVER after their step. **Users may however add adhoc REVIEWERS after systems control step if needed.

2. This will activate the “Insert additional approver or reviewer” window.
   - a. Type in the user id for the ad hoc approver or reviewer
   - b. Click on the “Approver” or the “Reviewer” radio button
   - c. Click on the “Insert” button

   Do NOT add APPROVERS after Systems Control Step
3. Approver Reviewer Search
   The magnifying glass in the "Insert additional approver or review" window will activate the "Approver/Reviewer Search" option (see previous section)
   1. Type the user's name or user ID
   2. Click on the “Search” button
      A list of users meeting the search criteria will appear
   3. Select the ad hoc approver or reviewer by clicking on the individual’s name or user id.

   The “Insert additional approver or reviewer” window will reappear
   4. Click on either the “Approver” or the “Reviewer” radio button
   5. Click on the “Insert” button
HOW TO DENY JOB DATA REQUESTS

The option to deny a request appears if the user has both the appropriate approval role and is the next step in the approval chain.

To deny a request

1. Type the reason for denial in the comments section
2. Click on the “Deny” button

JOB DATA CHANGE DENY CONFIRMATION

Once the Job Data Change request is denied, a confirmation page displays the information from the previous page in view only mode. The process monitor shows that the Job Data Change Request has been denied. Additionally, an email is sent to the initiator notifying him/her of the denied request.

1. Click on the “Exit” button to return to the search menu
HOW TO RETURN TO SAVED - JOB DATA CHANGE REQUESTS

Initiators have the ability to return to saved Job Data Change requests by accessing the specific employee in the “Request Employment/Job Changes” page. A new radio button will appear with description “Return to Work in Progress”. The user has the option to select a saved request for cloning up to 30 days after it was initially saved.

To return to a saved Job Data Change request:
1. Select the “Return to Work in Progress” dropdown menu

Note: This action moves the transaction to the next page—to complete the form.

HOW TO WITHDRAW - JOB DATA CHANGE REQUESTS

Initiators have the ability to withdraw Job Data Change requests by accessing the specific transaction in the “Manage Job Changes” page. Withdrawing the request essentially cancels the request from all pending approvers. Initiators may withdraw a request up until final approval. These requests are stored for 30.

How to withdraw a request:
1. Search for the request in the “Manage Job Changes” page.
2. Once transaction is selected and opened click the “Withdraw” button.

Job Attributes Change

VIEWING PENDING REQUESTS

Pending approval requests are available for viewing in two formats:
- Pagelets
- Manage Job Change Requests
1. HOW APPROVERS KNOW DOCUMENTS ARE PENDING THEIR APPROVAL

The UAccess Employee main page automatically displays a “pagelet” summary listing the transactions pending the individual approver’s action.

- The “pagelet” provides a “transaction” link directly to the transactions requiring the user’s approval.
- Each transaction type displays a total count of transactions available for approval.
- Selecting the “home” key on the first tab on the upper right side of any page will return the user to the MSS Approval Summary Pagelet.

Note: if a transaction type link is not available, this means no requests are available for approval at this time.

- Once a user selects a transaction type from the MSS Approval Summary they are directed to the individual transaction pagelet.
- Additional details are displayed to facilitate the order with which the transactions are selected.

2. HOW INITIATORS KNOW WHEN DOCUMENTS ARE APPROVED, DENIED OR PENDING

The "Manage Job Changes" page allows users with the UAccess Employee Position Cross-Reference role to view Job Change requests that are approved, denied, pending or withdrawn.

The Search dialog box provides multiple options for accessing Job Data Change transactions.

1. Enter the Initiator NetID or other criteria listed in the Search dialog box
2. Click on the “Search” button
   A list of values that meet the search criteria will be displayed
3. Click on any of the values listed to access specific transactions
   1. The user’s role and current approval step will determine whether the record is view only or available for change or approval.
Manage Job Changes

Enter any information you have and click Search. Leave fields blank for a list of all values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Effective Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Empl ID</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Request Status</td>
<td></td>
<td>Pending</td>
</tr>
<tr>
<td>Initiator NetID</td>
<td>begins with</td>
<td></td>
</tr>
</tbody>
</table>

Limit the number of results to (up to 300): 300

[Search] [Clear] [Basic Search] [Save Search Criteria]
SCENARIOS – WORKFLOW PATHS

The following examples describe the workflow paths a user may encounter when initiating or approving a document.

SELF APPROVAL

Initiator with HR Dept, College Reviewer or College approval role(s)

- The step for the specific approval role automatically self approves when the request is submitted.

Please see the example below:
HR Department Approver initiating a request

AUTO APPROVAL

Approver listed on multiple steps in path(s)

- Multiple paths for the same approver are automatically approved on all steps.

Please see the example below:
College/Division approving a request where they are listed in multiple steps based on their approval roles.
COLLEGE INITIATES A REQUEST

College initiates a request

- The HR Department Approvers are notified of the change via email.
- The request will automatically route to Systems Control upon submission.

Please see the example below:

SKIPPED STEPS

The system skips steps if it does not find approvers

- Steps are skipped if no one is assigned to an approval role
- At least one “HR Dept/College” approver is required for the path

Please see the example below:

NO APPROVERS FOUND

Transactions routed to an Error Step if no approvers assigned

- All steps are skipped if no approvers are assigned
- A Systems Control Approver will troubleshoot the transaction

Please see the example below:
ERROR/WARNING MESSAGES

The following examples describe the error or warning messages a user may encounter when initiating or approving documents.

ANOTHER APPROVER HAS TAKEN ACTION

A single step may have multiple approvers

- More than one approver can simultaneously review a transaction; however, only ONE can take action.

The following error message indicates another approver has already completed the step.

REQUEST IS ALREADY PENDING

Only one request to change Job Data can be submitted at a time. The following error message indicates another request is pending approval. The transaction # is listed so users can look up the transaction in “Manage Job Change” and find who initiated the action. The initiator can withdraw the previous transaction if needed.

CONTACT INFORMATION
If you are experiencing problems or just have questions about the Manager Self Service Campus Colleague Requests, please contact the Workflow Administrator.

**WHO TO CALL????**

E-mail is the best communication method for contacting the Workflow Administrator. The contact information is:

1. Abbie Montenegro – abbiem@email.arizona.edu  
   - Phone: 520-235-7387