

Navigation in EHRP

Chapter 1 Section 3

Menu

When you logon to EHRP, you are given a list of options in a menu for navigating through the database. Menus allow users to choose the panels they wish to use and give access to various features available for each panel. Use, Setup, Process, Inquire, and Report are high-level menu items that are repeated on almost every panel.

Use - allows a user to complete a business task, i.e., request a promotion.

Setup - provides access to relevant setup tables. Setup tables contain the valid values, such as award type, for EHRP users. EHRP users see the setup values via drop down list boxes.

Process – allows a user to execute related processes and view EHRP automated processes.

Inquire- allows a user to view relevant, display only panels that provide key information to management.

Report - allows a user to print and generate reports.

Because your role determines your access to pages, you may be able to access only a limited number of pages. If you feel you need to access additional pages, contact your designated Help PoC.

Paths to Pages

A path to a page is steps you use to access the page. For example, Home > Administer Workforce > Administer Workforce (USF) > Use > Hire is the path used to access the Hire page group.

Page Groups

Page groups or components are used to organize pages in a logical fashion. A particular topic may contain too much information to be displayed on one page, and therefore it requires multiple pages to be grouped together. Once you finish entering data on one page, click the folder tab of the next page to open it. You can also click the hyperlinks at the bottom of the page to access sub-pages in the group.

The Hire page group (shown above) consists of seven components – Data Control, Personal Data, Job, Position, Compensation, Employment 1 and Employment 2 and various hyperlinks.

Pages

A page is the image that appears after selecting options from the menu list, such as Administer Workforce>Administer Workforce (USF) Use>Hire. On this page, you would process a new hire transaction. Pages provide the means through which data is entered into the system, and they allow users to view this information.

The screenshot displays the 'Hire' page in the EHRP system. The breadcrumb trail at the top reads: Home > Administer Workforce > Administer Workforce (USF) > Use > Hire. A 'New Window' link is visible in the top right corner. The page features a navigation bar with tabs for 'Personal Data', 'Job', 'Position', 'Compensation', 'Employment 1', and 'Employment 2'. The 'Employment 1' tab is active. Below the navigation bar, the 'Data Control' section contains various input fields and buttons. Key fields include 'Actual Effective Date' (11/01/2001), 'Proposed Effective Date' (11/01/2001), 'Transaction # / Sequence' (1 / 1), 'Action' (HIR - Hire), 'Reason Code' (NPS - New Position), 'NOA Code' (100 - Career Appt), and 'Authority (1)' (K1M - Reg 315.601. Appt based). There are also buttons for 'Print SF-52', 'Print SF-50', and 'PAR Request#'. At the bottom, there are 'Save', 'Previous tab', and 'Next tab' buttons, along with a 'Data Control | Personal Data | Job | Position | Compensation | Employment 1 | Employment 2' breadcrumb trail.

Hyperlinks

In addition to fields on a page, sometimes there are other objects that do not display information or allow the user to enter information into them. These objects are known as hyperlinks. Hyperlinks are used as a way accessing another page. For example, clicking the [Address Information](#) hyperlink pulls up a page with fields that enables address data to be entered or viewed. At times it is beneficial to use hyperlinks rather than simply displaying all the information on the page because it alleviates congestion of fields and keeps data that is not frequently referenced out of sight.

New Window

It is possible to have more than one window of EHRP open at one time. This can be very useful when you need to switch between two pages. Once you access the first window you need, you may access the second window by clicking the [New Window](#) hyperlink located in the top right corner of the page. At this point, you have the same menu items available to you when selecting the first window. Be sure to save your work in both open windows.

Fields

Fields, sometimes referred to as controls, are single items of information displayed on pages. The field may be represented in various ways, such as a text box, checkbox, radio button, etc., but it is still one piece of information.

- **View-Only Fields** - Often users add or edit data in fields by entering values or selecting a choice from a list. However, there are times when users may only be allowed to view the information, not modify it. These view-only fields are displayed slightly differently on the pages. They appear gray rather than dark, and it is impossible to alter their values.
- **Default Fields** - Users will also notice that it is common for some information to default on the page, whether or not the field is view-only. On many occasions the information needed in a field is repetitive from session to session or may be related to another field that has been previously entered. To make data entry more efficient these fields have been populated. For example, it is often necessary to enter the current date. Therefore the field could be designed to retrieve the current date from the computer's internal calendar.

Data Entry Formats

- **Dates** - Users should enter dates in the eight-character MMDDYYYY format. For example, if the date April 2, 2001 must be entered, simply type "04022001". EHRP will then format the date to display 04/02/2001. It is not necessary to type the slashes. However, you could type "4/2/01". EHRP will then format the date to display 04/02/2001. Slashes do not need to be entered when you type a digit in each space in the fields. But if you choose to enter the shorter dates, the slashes must be used.

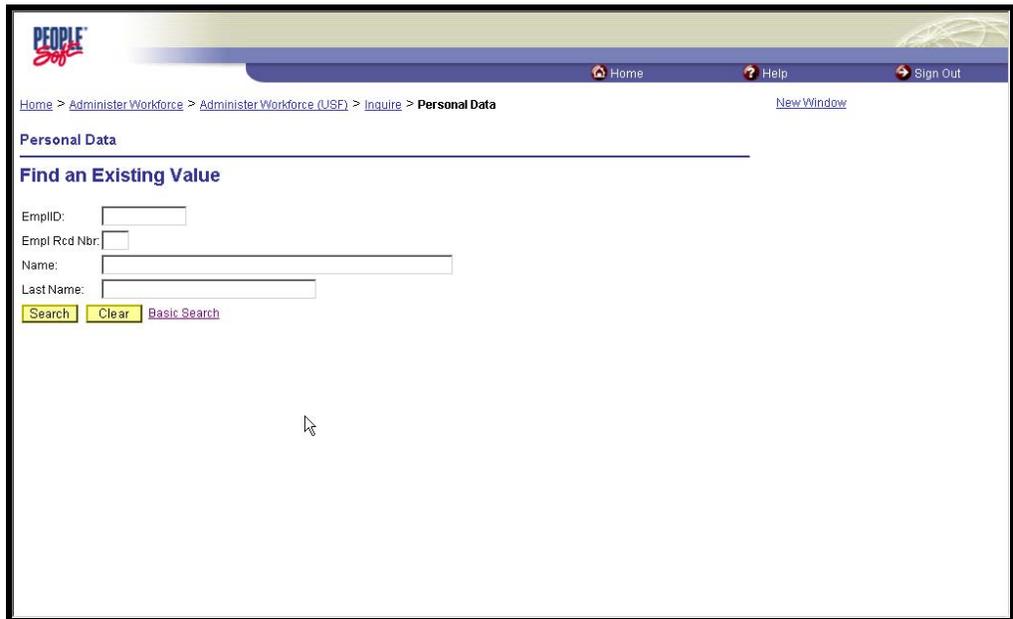
PeopleSoft determines whether the century is 1900 or 2000 based on the last two digits of the year. If the last two digits of the year are 50 or less, then 2000 is the century; if the last two digits of the year are greater than 50, then 1900 is the century. For example, if you enter "4/2/76", then 04/02/1976 will display. If you enter "04/02/12", then 04/02/2012 will display.

- **Social Security Numbers** – are entered in the National ID field.

It is imperative that you check your entries for errors before saving. Try to avoid misspellings at all times. Once data is entered into EHRP, it becomes part of an employee's record and a correction action is required to alter any information.

Searches

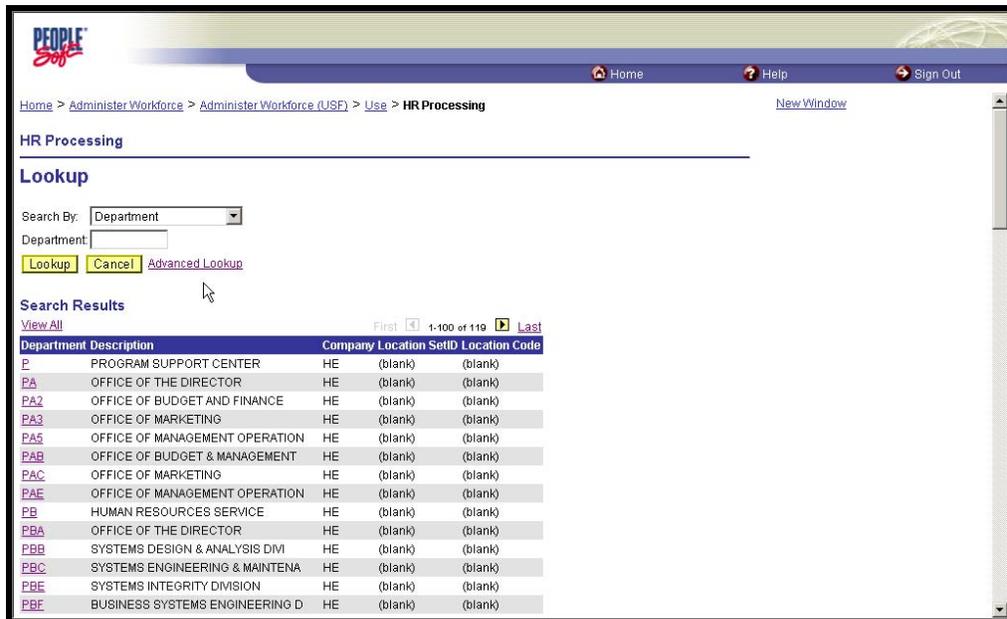
A field or a combination of fields distinctively identifies every table in the EHRP database. For example, the EmplID 0067 uniquely identifies a particular employee. EHRP provides search dialog boxes that are used to search for data when you want to display a page. The fields that uniquely identify your data are called *keys*. To display a page, you would enter the key data values for which to search on the search page, so that the system can retrieve the correct row of data. For example, when navigating to the Personal Data page, the Find an Existing Value dialog box appears. You would enter the values to perform your search, such as EmplID, Empl Rcd Nbr, Name or Last Name.



The screenshot shows a web browser window with the PEOPLE Soft logo in the top left. The navigation bar includes Home, Help, and Sign Out. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce (USF) > Inquire > Personal Data. A [New Window](#) link is visible. The main content area is titled "Personal Data" and contains a section "Find an Existing Value". This section has four input fields: "EmplID:", "Empl Rcd Nbr:", "Name:", and "Last Name:". Below the fields are three buttons: "Search", "Clear", and "Basic Search". A mouse cursor is positioned in the center of the page.

Lookup

If you are unsure of which value to enter in a field, there may be a Lookup to assist you. You can search for available values by clicking the  icon next to a particular field. A Lookup page appears prompting you to enter search criteria. For example, if you clicked  next to the Department field you could lookup existing departments to locate the correct entry.



Lookup

When the Lookup Department dialog box appears, you can click **Lookup** or press Enter to see a list of all valid departments. Or, you can type in the full or partial department name in the Description field to find the value you need.

If a value that you need is not on the table, you should contact the designated Help PoC.

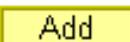
Calendar Function

When a field prompts the user to enter a date, the date may be entered via typing a date or selecting one from a calendar. To access the calendar, click the  icon. After clicking the icon, a calendar pops up. Alternatively, you can press Alt+5 while in the field containing the calendar prompt to open the calendar. The calendar highlights the current day. Clicking a different number within the month changes the highlighted day. As soon as the day is clicked, it is entered into the field. However, the month and year may also be changed with the mouse.



Shortcuts

In addition to using the mouse to navigate in EHRP, there are other alternatives available for your use. A few shortcuts are listed below for your use. When you use any of the key combinations shown below, the designated action will occur.

Key	Button or Link	Action
Alt+5	 	Opens calendar prompt Opens the lookup page
Alt+7	 	Inserts row in a grid or scroll area
Alt+8		Deletes a row in a grid or scroll area
Alt+.		Next in grid, scroll or search page results list
Alt+,		Previous in grid, scroll or search page results list

Alt+'	View All	View all rows of data in a grid, scroll area or search page results list
Enter	  	Activates the Okay button Activates the Lookup button on the Lookup page Activates the Search button on the Search page
Esc		Activates the cancel button

Save and Cancel

After entering information into EHRP, a user has two options. One option is to save the data, and the second is to cancel it.



Save - In order to save the data, the user must click the Save icon. If the user exits the system without saving the action(s) just completed, the work will be lost. This point is important to note in regard to long procedures (e.g., hire and pay action functions). A user must commit to seeing the procedure through to completion with a save before exiting the system or moving to another task. Also, if the user times out of EHRP before information is saved, it will be lost.

Cancel - To close a transaction without saving it, the user can cancel the action. This can be done by clicking the [Home](#) hyperlink, which will return the user to the initial menu. The transaction will be cancelled and the page group will be closed without saving any changes.

Warnings and Errors

The EHRP system is designed with functionality that enhances the user's ability to enter accurate information for processing in the system. Two types of messages may appear in order to give the user a warning when data may have been entered incorrectly.

Warnings

In certain areas of the system, there are “soft edits” that are built in to verify that certain relevant pieces of information have been entered. While these items of information are helpful to have recorded in EHRP, they are not necessary in order to save an action.

An example pertains to entering dependents for an employee. After entering the dependent’s name, address, etc., a field on the **Personal Profile** tab gives the user the opportunity to enter the dependent’s birthdate.

The screenshot shows the 'Personal Profile' tab for a dependent named 'Cyr, Jeannine E'. The form includes fields for 'Dependent/Beneficiary', 'Relationship to Employee', 'FEHB Participant', 'Birthdate', 'Birth Country', 'Birth Location', 'Gender', 'Marital Status', 'Marital Status Date', 'Occupation', 'Date of Death', 'Medicare Entitled Date', 'Student', 'Disabled', 'Smoker', and 'Student Status Date'. The 'Birthdate' field is circled in red. Below the form is a table for 'National ID' with columns for Country, National ID Type, Description, National ID, and Primary ID.

Country	National ID Type	Description	National ID	Primary ID
USA	FR	Social Security Number	123-45-6789	<input checked="" type="checkbox"/>

If the user decides not to enter a birthdate for the dependent and saves the action, the following **warning** message appears:

The warning message dialog box contains the text: 'Warning -- Birthdate should be entered for dependent (Dependent 01). (3000,505)'. Below the text are two buttons: 'OK' and 'Cancel'.

At this warning, the user has two options:

1. Clicking **OK** will allow the save action on the record, without a birthdate being input into the system.
2. Clicking **Cancel** will return the user to the previous page and will allow the entry of the field referred to in the warning. After completing that field, the record may be saved without seeing the warning message.

Errors

In EHRP, an error message will appear when a user attempts to save a record that contains insufficient or incorrect data. Unlike warnings, errors must be corrected before the system will allow the user to save a record.

An example is shown below pertaining to the entry of an employee's dependent. Note how the dependent's first name has not been entered.

In entering a dependent on the employee record, the user neglected to enter a first name for the employee's son. Upon attempting to save the record, the following error appears.



Clicking **OK** will return the user to the page where the entry is necessary. Unlike the warning described above, this error will prevent the saving of the record until the requirement (in this case, the entry of a first name) is met.