Overview
Quick actions are links on the Home page that enable you to initiate actions quickly on yourself, your team, or your client groups. You can view the quick actions grouped under the following tabs:

- **Me** - This tab lists actions to manage your own information.
- **My Team** - This tab lists actions to manage your team.
- **My Client Groups** - This tab lists actions to manage people within your area of responsibility.

Click the Show More link to view all the available actions grouped under a specific heading.

The set of actions that you see are displayed based on your security privileges. The people that you can act on differ based on the tab you're on. Consider that you are both a line manager and an HCM Initiator. You can access the Promote action from both the tabs: My Team and My Client Groups. In addition, you will see a different set of employees on each tab whom you can promote. You can promote only your direct reports using the Promote task in the My Team tab. You can promote only those employees that you have access to as an HCM Initiator, using the Promote task in the My Client Groups tab.

*This job aid will walk through how to add an assignment to a person. Specifically, this job aid highlights the HCM Initiator’s responsibility to begin the Graduate Fellow process that flows from HCM to P2P.*

*Updating Costing for Grad Fellows: Fill out the costing template with updated information so we can apply to future payments. Refer to Payroll Calendar Deadlines provided by GPS.*

*Ending Assignments for Grad Fellow: When a fellow assignment needs to be ended or terminated prior to the end date as entered on the costing template. Ending an assignment or termination will be done through a quick action. A costing sheet with “Termination” selected and only the first portion filled out (Name, Oracle Person #, banner Student ID) so P2P will know who to stop future payments for. (This is because not all information will flow over through a notification and we need to verify we have the right person to terminate payments for). Refer to Payroll Calendar Deadlines provided by GPS.*
Table of Contents

Page 2: Navigate to My Team - Quick Actions Menu
Page 2: Add Assignment (Graduate Fellows example)
Page 5: Add Assignment (Staff example)
Page 8: End Assignment

I. Navigate to My Client Groups - Quick Actions Menu

1. Under the **My Client Groups** heading on the home page, you can view the actions available under Quick Actions on the left-hand side of the page.
2a. Add Assignment (Graduate Fellows example)

1. From the Quick Action section, you can add an assignment by selecting **Add Assignment**.

   ![Add Assignment](image1)

   a. You will be taken to the Add Assignment page. Search for the employee you want to add an assignment in the **Search for a Person** field. In this example, we will add an assignment for a **Graduate Fellow**.

   ![Add Assignment](image2)

   b. Select the **Check Box** next to the information you want to manage, then select **Continue**. In this example, we will select Maintain Managers and Comments and Attachments.

      i. **Note:** For this process, you do not need Salary, Compensation, or Direct Reports.

   ![Add Assignment](image3)

   c. Complete the When and Why section, then select **Continue**. For Graduate Fellows, make the following selections:

   ![Add Assignment](image4)

   Updated as of June 18, 2021
i. **When Does the assignment start?:** Type the date or use the calendar to select.

ii. **Will the assignment be temporary or permanent?:** Choose *Permanent* from the drop-down menu.

iii. **What's the way to add the assignment?:** Choose *Add Assignment* from the drop-down menu.

iv. **Why are you adding the new assignment?:** Depending on the type of assignment, choose the correct reason. For this example of Graduate Fellow, choose *Graduate Fellow Appointment.*

d. Complete the Assignment section and then select *Continue.* Choose values appropriate for the type of assignment being added.

- **Assignment Status:** Select *Active – No Payroll*
- **Person Type:** Select *Contingent Worker or Person Opt Out*
- **Business Unit:** Choose *General* from the drop-down menu.
- **Primary Assignment:** Choose *yes* from the drop-down menu.
- **Projected End Date:** Enter date or use calendar to select.
vi. **Business Title:** Enter the Business Title.

vii. **Department:** Choose value from the drop-down menu.

viii. **Reporting Establishment:** Choose value from the drop-down menu.

ix. **Location:** Choose value from the drop-down menu. You could begin typing the building name to populate the drop-down.

x. **Mailstop:** Enter value in field in the format MS-##.

xi. **Assignment Category:** Choose Graduate Fellow.

xii. Ensure the Default Expense Account pop up matches the screen shot below. Then, click **OK.**

![Default Expense Account](image)

i. **Note:** All values will stay consistent except the Organization value which is the Department or Org number.

e. Complete the Comments and Attachments section.

![Comments and Attachments](image)

i. **Comments:** Enter a comment about supplier costing info attached.
ii. **Attachments:** Add costing spreadsheet to send info to AP/Procurement for payment. Please see the steps on the next page for preparing the Costing Sheet, then continue.

### 2b. Preparing the Grad Fellow Costing Sheet

iii. Populate the fields described below to ensure AP/Procurement can adequately add the Graduate Fellow for payment. **All green fields are required.**

1. **Is this? Please select:** Choose whether this is a new Graduate Fellow setup, a change to an existing Graduate Fellow setup, or termination. **THIS IS VERY IMPORTANT:** It will illustrate to AP/Procurement how to proceed.

   ![Fellow Stipend Costing Setup](image)

   **Note:** you must click the gray box in bottom right corner of row 2 column J to select options.

2. **Last Name:** Type in the Graduate Fellow’s last name
3. **First Name:** Type in the Graduate Fellow’s first name
4. **Middle Name/Initial:** Type in the Graduate Fellow’s middle name
5. **Preferred First Name:** Type in the Graduate Fellow’s preferred first name
6. **Suffix:** Type in the Graduate Fellow’s suffix
7. **Oracle Person #:** Type in the Graduate Fellow’s person number from Oracle

*Updated as of June 18, 2021*
8. **Banner Student ID**: Type in the Graduate Fellow’s Banner Student ID
9. **Dept #**: Type in the Graduate Fellow’s department number
10. **Dept Name/Abbrev**: Type in the Graduate Fellow’s department name
11. **Graduate Fellow Appointment Title**: Type in the Graduate Fellow’s appointment title
12. **Oracle Assignment Category**: Select Graduate Fellow or Postdoctoral Fellow: Limited Benefits from the drop down

13. **Location**: Type in the Graduate Fellow’s location
14. **MS**: Type in the Graduate Fellow’s mail stop
15. **Rice Phone**: Type in the Graduate Fellow’s Rice phone number
16. **Advisor/Director of Graduate Studies**: Type in the Graduate Fellow’s Advisor/Director (this could be the faculty advisor). Check with your Dept Administrator for questions.
17. **Advisor/DGS Person #**: Type in the Graduate Fellow’s Advisor/DGS person number (this could be the faculty advisor). Check with your Dept Administrator for questions.
18. **First Pay Date**: Type in the date the Graduate Fellow should receive their first payment.
19. **Last Pay Date**: Type in the date the Graduate Fellow should receive their last payment.
20. **Total Stipend This Action**: Type in the total amount the Graduate Fellow should be paid in total. This should only include stipend tied to the fellowship and total 100%.
21. **Number of SM Payments**: Type in the number of semi-monthly payments to the Graduate Fellow.
22. **Amount per Payment**: This will be calculated by the spreadsheet based on the total stipend and number of semi-monthly payments.
iv. Continue down to the bottom half of the spreadsheet. This is where you will enter the costing information for the Graduate Fellow. All of this information must be full and complete in order for AP/Procurement to pay the Graduate Fellow. Incomplete costing information may result in a rejection from AP/Procurement.

1. The Reference Guide below illustrates the standard semi-monthly pay dates.

2. First determine whether the Graduate Fellow’s salary will be **CoA funded, project funded, or both**. If it is **CoA** funded, all of the element of the Chart of Accounts (blue fields) must be populated. **There are multiple rows to accommodate split funding.**
3. If the Graduate Fellow’s salary is project funded, please populate every **POETAF** value (yellow fields):

**EXAMPLE:**

<table>
<thead>
<tr>
<th>Percent</th>
<th>Entity</th>
<th>Organization</th>
<th>Fund Type</th>
<th>Fund Source</th>
<th>Account</th>
<th>Classification</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td>10</td>
<td>290000</td>
<td>100</td>
<td>120407</td>
<td>7402</td>
<td>400</td>
<td>1029</td>
<td>999</td>
<td>999</td>
</tr>
<tr>
<td>0.00</td>
<td>10</td>
<td>290000</td>
<td>100</td>
<td>120231</td>
<td>7402</td>
<td>400</td>
<td>1096</td>
<td>999</td>
<td>999</td>
</tr>
</tbody>
</table>

100.00 % Total (must total 100%)

**EXAMPLE:**

<table>
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<tr>
<th>Percent</th>
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<td>400</td>
<td>1096</td>
<td>999</td>
<td>999</td>
</tr>
</tbody>
</table>

100.00 % Total (must total 100%)

**There are multiple rows to accommodate split funding.**

4. Next, populate the **percent** for each COA string or POETAF string Graduate Fellow’s funding. Ex. one POETAF, enter 100%
v. Once the spreadsheet is FULLY populated, please save the spreadsheet with the following **naming convention** using the Graduate Fellow’s Last Name and Legal First Name (not preferred name). **Please note: these spreadsheets can be pre-prepped.**

1. Graduate Fellow Last Name_Graduate Fellow First Name_Date of First Payment
   a. Ex. Doe_Jane_7.15.21

Please see below for an example of a fully populated form:
vi. Once complete, jump back into iO. Click the blue **Drag files here or click to add attachment** link and then click **Add File**. If you need to update this costing at any time, follow the same steps to attach a new costing sheet. **Refer to Payroll Calendar Deadlines provided by GPS.**

![Drag files here or click to add attachment](image)

1. Browse your desktop for the document. Once selected, click **Open**.

![Open](image)

2. When you see your document appear in the Attachments section, click **Save**.

![Save](image)

f. When all sections are complete, scroll back to the top of the page and select **Submit**.

![Submit](image)

g. When complete, navigate back to the home page by selecting the **Home** icon in the upper right-hand corner.
2c. Add Assignment (Staff example)

2. From the Quick Action section, you can add an assignment by selecting **Add Assignment**.

a. You will be taken to the Add Assignment page. Search for the employee you want to add an assignment in the **Search for a Person** field. In this example, we will add an assignment for a **Staff**.

b. Select the **Check Box** next to the information you want to manage, then select **Continue**. In this example, we will select Maintain Managers, Salary, Compensation, Add Direct Reports, and Comments and Attachments.
c. Complete the When and Why section, then select **Continue**. Make the following selections:

![Image of the When and Why section](image.png)

i. **When Does the assignment start?**: Type the date or use the calendar to select.

ii. **Will the assignment be temporary or permanent?**: Choose *Permanent* from the drop-down menu.

iii. **What’s the way to add the assignment?**: Choose *Add Assignment* from the drop-down menu.

iv. **Why are you adding the new assignment?**: Depending on the type of assignment, choose the correct reason. For this example, choose *Additional Assignment*.

d. Complete the Assignment section and then select **Continue**. Choose values appropriate for the type of assignment being added.

   i. **Note**: This will vary based off the assignment (staff, faculty, or student). This is a staff example.
**Assignment Status**: Select *Active – Payroll Eligible*

**Person Type**: Select *Employee*

**Business Unit**: Choose *General* from the drop-down menu.

**Primary Assignment**: Choose value from the drop-down menu.

**Projected End Date**: Enter date or use calendar to select.

**Position**: Choose value from the drop-down menu.

**Synchronize from Position**: Choose value from the drop-down menu.

**Job**: Choose value from the drop-down menu.

**Business Title**: Enter the Business Title.

**Grade**: Choose value from the drop-down menu.

**Department**: Choose value from the drop-down menu.

**Reporting Establishment**: Choose *William Marsh Rice University LRU*

**Location**: Choose value from the drop-down menu.
xv. **Mailstop:** Enter value in field.
xvi. **Working at Home:** Choose value from the drop-down menu.
xvii. **Worker Category:** If applicable, choose value from the drop-down menu.
xviii. **Assignment Category:** Depending on the type of assignment, choose the correct assignment category.
xix. **Regular or Temporary:** Choose value from the drop-down menu.
xx. **Full Time or Part Time:** Choose value from the drop-down menu.
xxi. **Hourly Paid or Salary:** Choose value from the drop-down menu.
xxii. **Working Hours:** Choose value from the drop-down menu.
xxiii. **Standard Working Hours:**
xxiv. **FTE:** Enter value in field.
xxv. **Working as a Manager:** Choose value from the drop-down menu.
xxvi. **Rice Eligibility:** Choose value from the drop-down menu.
xxvii. **Total Classroom Hours:** Enter the total classroom hours.
xxviii. **Total Office Hours:** Enter the total office hours.
xxix. **Tenure Status:** Choose value from the drop-down menu.
xxx. **Tenure Date:** Type the date or use the calendar to select.
xxxi. **Faculty Rank Effective Date:** Type the date or use the calendar to select.
xxxii. **IPEDS Contract Type:** Choose Faculty from the drop-down menu.
xxxiii. **Holiday/Recess Daily Hours:** Choose value from the drop-down menu.
xxxiv. **Expense Account:** Fill out as it is seen in the screenshot below, then click **OK.**

![](image)

i. **Note:** All values will stay consistent except the Organization value which is the Department or Org number.
e. Complete the Comments and Attachments section.

   i. **Comments**: Enter comments in this field.
   
   ii. **Attachments**: To add attachments, click the blue Drag files here or click to add attachment link and then click Add File.

   1. Browse your desktop for the document. Once selected, click Open.

   2. When you see your document appear in the Attachments section, click Save.

f. When all sections are complete, scroll back to the top of the page and select Submit.

   g. When complete, navigate back to the home page by selecting the Home icon in the upper right-hand corner.
3. End Assignment

1. You can end an assignment by selecting Change Assignment. Ending an assignment for Graduate Fellows requires additional information as noted in the attachment step.
   a. From the Quick Action section, select **See More**.

   ![Show More](image1)

   ![Change Assignment](image2)

   b. Then select **Change Assignment**.

   ![Employee Summary](image3)

   ![Change Assignment](image4)

   ![Change Location](image5)

   c. You will be taken to the Change Assignment page. Search for the employee you want to add an assignment in the **Search for a Person field**.

   ![Change Assignment](image6)

   ![Search for a Person](image7)

   d. Select the **Check Box** next to the information you want to manage, then select **Continue**. In this example, we will end an assignment; select **Comments and Attachments**.

   ![Change Assignment](image8)

   ![Comments and Attachments](image9)
e. Complete the When and Why section, then select Continue.

   i. *When does the assignment change start?: Enter date or use calendar to select.
   ii. *What’s the way to change the assignment?: Choose End Assignment from the drop-down menu.
   iii. Why are you changing the assignment?: Choose from the drop-down menu.

f. Complete the Assignment section and then select Continue.

   i. *Assignment Status: Select Inactive – Payroll Eligible
g. Complete the Comments and Attachments section.

![Comments and Attachments](image)

i. **Comments**: Enter comments in this field.

ii. **Attachments**: To add attachments, click the blue **Drag files here or click to add attachment** link and then click **Add File**. When a fellow assignment needs to be ended or terminated prior to the end date as entered on the costing template. Ending an assignment or termination will be done through a quick action. A costing sheet with “Termination” selected and only the first portion filled out (Name, Oracle Person #, banner Student ID) so P2P will know who to stop future payments for. (This is because not all information will flow over through a notification and we need to verify we have the right person to terminate payments for). Refer to Payroll Calendar Deadlines provided by GPS.

![Fellow Stipend Costing Setup](image)

1. Browse your desktop for the document. Once selected, click **Open**.

2. When you see your document appear in the Attachments section, click **Save**.
h. When all sections are complete, scroll back to the top of the page and select **Submit**.

![Change Assignment](image)

i. When complete, navigate back to the home page by selecting the **Home** icon in the upper right-hand corner.

![Home icon](image)