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.***

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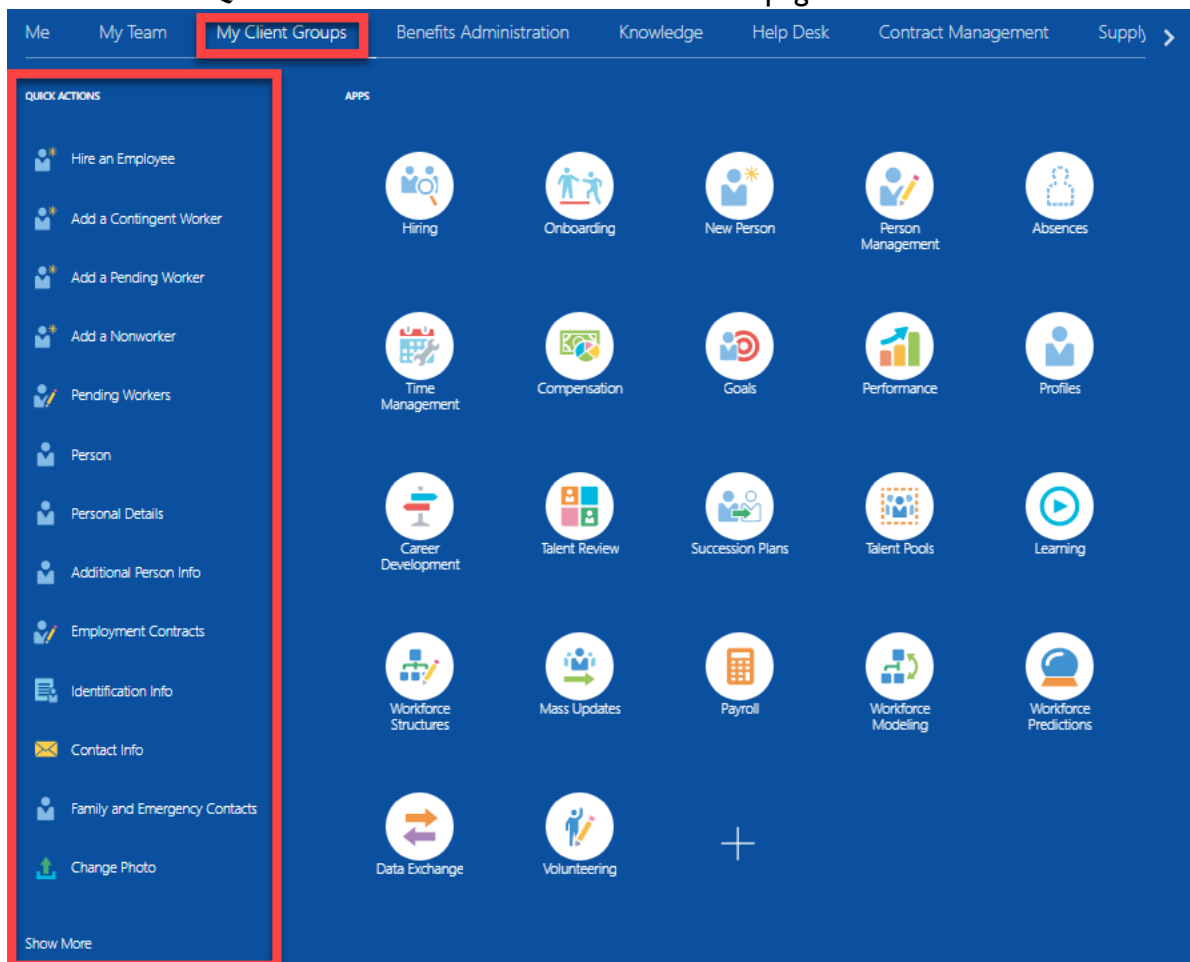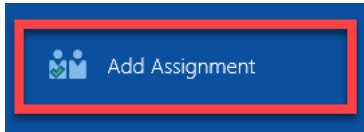# 1. Navigate to My Client Groups - Quick Actions Menu

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.
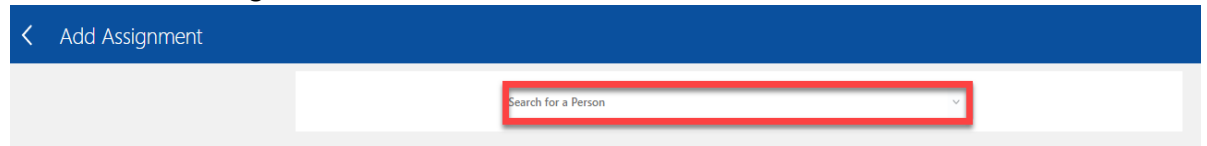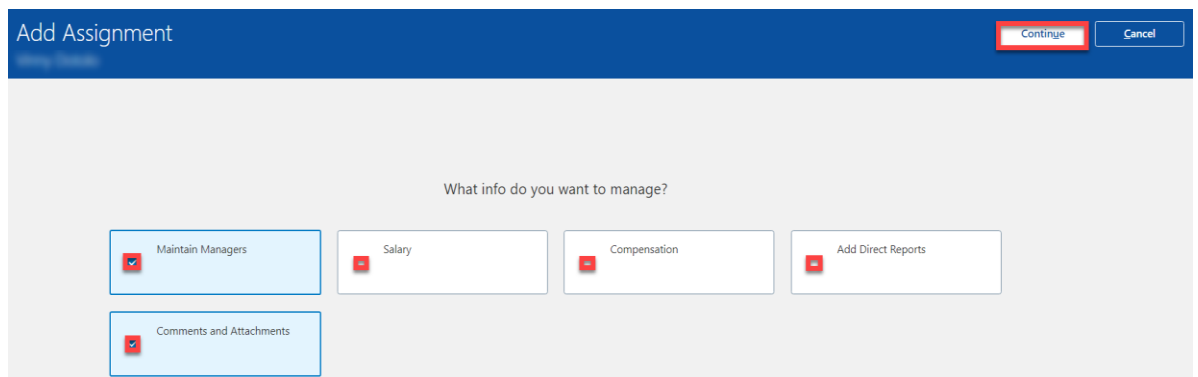
2a. Add Assignment (Graduate Fellows example)

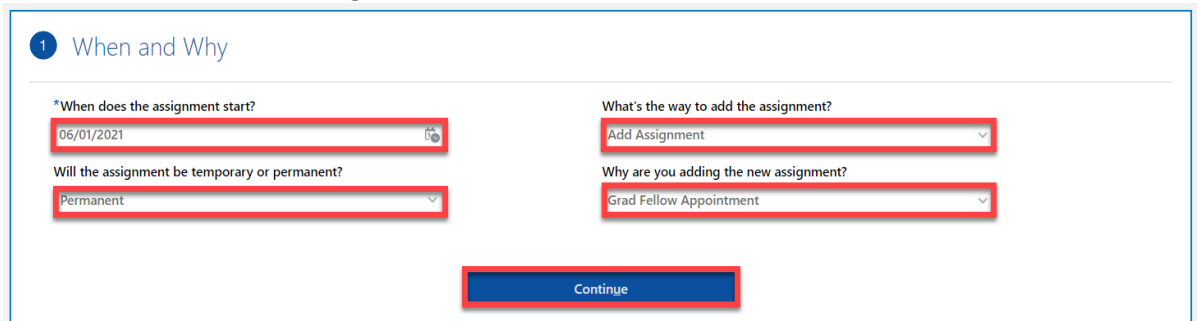1. From the Quick Action section, you can add an assignment by selecting **Add Assignment.**

   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.*

   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.*

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

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.

i. ***Assignment Status:** Select *Active – No Payroll*
ii. **Person Type:** Select *Contingent Worker or Person Opt Out*
iii. ***Business Unit:** Choose *General* from the drop-down menu.
iv. **Primary Assignment:** Choose *yes* from the drop-down menu.
v. **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.**

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 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								
Is this? (Please select)		New Setup ▼						
Last Name *	First Name *	Middle Name/Initial	Preferred First Name *	Suffix	Oracle Person #	Banner Student ID *	Dept # *	Dept Name/Abbrev
Graduate Fellow Appointment Title *			Oracle Assignment Category *		Location (Bldg\Floor\Rm)		MS	Rice Phone
			Graduate Fellow					713 - 348 - 9999
Advisor/Director of Graduate Studies *		Advisor/DGS Person # *	First Pay Date *	Last Pay Date *	Total Stipend This Action*	Number of SM Payments*		Amount per Payment
								#DIV/0!
* Fields in green shading are required								

Note: you must click the gray box in bottom right corner of row 2 column J to select options.
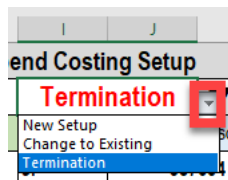
2. ***Last Name**: Type in the Graduate Fellow's last name
3. ***First Name**: Type in the Graduate Fellow's first name
4. **Middle Name/Initial**: Type in the Graduate Fellow's middle name
5. ***Preferred First Name**: Type in the Graduate Fellow's preferred first name
6. **Suffix**: Type in the Graduate Fellow's suffix
7. **Oracle Person #**: Type in the Graduate Fellow's person number from Oracle

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.

Fellow Stipend Costing Setup								
Is this? (Please select)			**New Setup** ▼					
Last Name *	First Name *	Middle Name/Initial	Preferred First Name *	Suffix	Oracle Person #	Banner Student ID *	Dept # *	Dept Name/Abbrev
Graduate Assistant Appointment Title *			Oracle Assignment Category *		Location (Bldg\Floor\Rm)		MS	Rice Phone
			Graduate Fellow					713 - 348 - 9999
Advisor/Director of Graduate Studies *		Advisor/DGS Person # *	First Pay Date *	Last Pay Date *	Total Stipend This Action*	Number of SM Payments*		Amount per Payment
								#DIV/0!

* Fields in green shading are required

EXAMPLE:

Last Name *	First Name *	Middle Name/Initial	Preferred First Name *	Suffix	Oracle Person #	Banner Student ID *	Dept # *	Dept Name/Abbrev
Doe	John	A	John	Jr	987654	S00091548	24280	Math
Graduate Assistant Appointment Title *			Oracle Assignment Category *		Location (Bldg\Floor\Rm)		MS	Rice Phone
Graduate Fellow - Math			Graduate Fellow		Herman Brown Hall\B1\B135A		136	713 - 348 - 9999
Advisor/Director of Graduate Studies *		Advisor/DGS Person # *	First Pay Date *	Last Pay Date *	Total Stipend This Action*	Number of SM Payments*		Amount per Payment
Alan Reid		9488	7/15/2021	6/30/2022	$ 34,000.00	24		$ 1,416.67

* Fields in green shading are required

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.

Reference Guide: Standard Semi-Monthly Pay Dates

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1/15	2/15	3/15	4/15	5/15	6/15	7/15	8/15	9/15	10/15	11/15	12/15
1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30	10/31	11/30	12/31

Costing

Percent	COA									POETAF				
	Entity	Organization	Fund Type	Fund Source	Account	Classification	Program	Activity	Location	Project	Organization	Expense Type	Task	Award	Funding Source

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.*

Costing										
	COA									
Percent	Entity	Organization	Fund Type	Fund Source	Account	Classification	Program	Activity	Location	
										POETAF
										Project / Organization / Expenditure Type / Task / Award / Funding Source
0.00	% Total (Must total 100%)									

EXAMPLE:

Costing										
	COA									
Percent	Entity	Organization	Fund Type	Fund Source	Account	Classification	Program	Activity	Location	
50.00	10	29000	100	120407	7452	400	1029	999	999	
25.00	10	29000	100	120231	7452	400	1096	999	999	
										POETAF
										Project / Organization / Expenditure Type / Task / Award / Funding Source
25.00										R7P820 / 24300 / ODC: Fellowsh / 1 / R7P820-A / Johns Hopkins University
100.00	% Total (Must total 100%)									

3. If it the Graduate Fellow's salary is project funded, please populate every **POETAF** value (yellow fields):

Costing										
	COA									
Percent	Entity	Organization	Fund Type	Fund Source	Account	Classification	Program	Activity	Location	
										POETAF
										Project / Organization / Expenditure Type / Task / Award / Funding Source
0.00	% Total (Must total 100%)									

EXAMPLE:

Costing										
	COA									
Percent	Entity	Organization	Fund Type	Fund Source	Account	Classification	Program	Activity	Location	
50.00	10	29000	100	120407	7452	400	1029	999	999	
25.00	10	29000	100	120231	7452	400	1096	999	999	
										POETAF
										Project / Organization / Expenditure Type / Task / Award / Funding Source
25.00										R7P820 / 24300 / ODC: Fellowsh / 1 / R7P820-A / Johns Hopkins University
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%

Costing															
	COA														
Percent	Entity	Organization	Fund Type	Fund Source	Account	Classification	Program	Activity	Location						
										POETAF					
										Project	Organization	Expenditure Type	Task	Award	Funding Source
0.00	% Total *(Must total 100%)*														

EXAMPLE:

Costing															
	COA														
Percent	Entity	Organization	Fund Type	Fund Source	Account	Classification	Program	Activity	Location						
50.00	10	29000	100	120407	7452	400	1029	999	999						
25.00	10	29000	100	120231	7452	400	1096	999	999						
										POETAF					
										Project	Organization	Expenditure Type	Task	Award	Funding Source
25.00										R7P820	24300	ODC: Fellowsh	1	R7P820-A	Johns Hopkins University
100.00	% Total *(Must total 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:

Fellow Stipend Costing Setup

Is this? (Please select) **Termination** ▼

Last Name *	First Name *	Middle Name/Initial	Preferred First Name *	Suffix	Oracle Person #	Banner Student ID *	Dept # *	Dept Name/Abbrev
Doe	John	A	John	Jr	987654	S00091548	24280	Math

Graduate Assistant Appointment Title *			Oracle Assignment Category *	Location (Bldg\Floor\Rm)		MS	Rice Phone
Graduate Fellow - Math			Graduate Fellow	Herman Brown Hall\B1\B135A		136	713 - 348 - 9999

Advisor/Director of Graduate Studies *	Advisor/DGS Person # *	First Pay Date *	Last Pay Date *	Total Stipend This Action*		Number of SM Payments*	Amount per Payment
Alan Reid	9488	7/15/2021	6/30/2022	$	34,000.00	24	$ 1,416.67

Fields in green shading are required

Reference Guide: Standard Semi-Monthly Pay Dates

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1/15	2/15	3/15	4/15	5/15	6/15	7/15	8/15	9/15	10/15	11/15	12/15
1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30	10/31	11/30	12/31

Costing

Percent	Entity	Organization	Fund Type	Fund Source	Account	Classification	Program	Activity	Location
					COA				
50.00	10	29000	100	120407	7452	400	1029	999	999
25.00	10	29000	100	120231	7452	400	1096	999	999

POETAF

Percent		Project	Organization	Expenditure Type	Task	Award	Funding Source
25.00		R7P820	24300	ODC: Fellowsh	1	R7P820-A	Johns Hopkins University

100.00 | % Total *(Must total 100%)*

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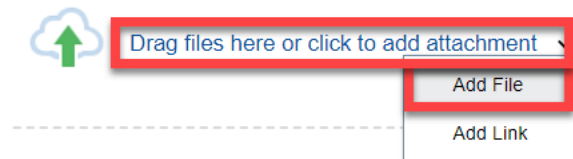
1. Browse your desktop for the document. Once selected, click **Open**.

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.

2c. Add Assignment (Staff example)

2. From the Quick Action section, you can add an assignment by selecting **Add Assignment.**
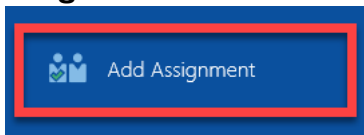
a. You will be taken to the Add Assignment page. Search for the employee you want to add an assignment in the **Search for a Person** field. In this example, we will add an assignment for a *Staff.*
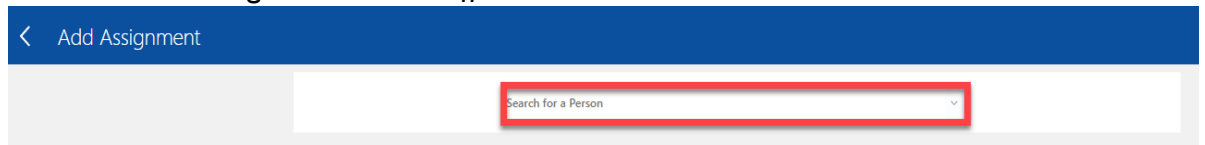
b. Select the **Check Box** next to the information you want to manage, then select **Continue**. In this example, we will select Maintain Managers, Salary, Compensation, Add Direct Reports, and Comments and Attachments.

Updated as of June 18, 2021
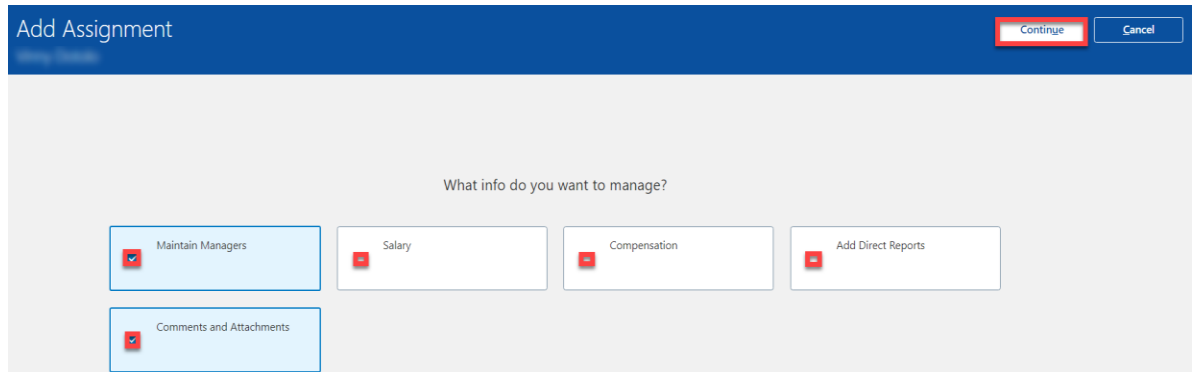
c. Complete the When and Why section, then select **Continue**. Make the following selections:

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.

2 Assignment

*Assignment Status	*Assignment Category
Active - Payroll Eligible	Staff: Benefits Eligible
Person Type	Regular or Temporary
Employee	Regular
*Business Unit	Full Time or Part Time
GENERAL	Full time
Primary Assignment	Hourly Paid or Salaried
No	Salaried
Projected End Date	Working Hours
mm/dd/yyyy	40 Weekly
Position	Standard Working Hours
Director of Development	40 Weekly
*Synchronize from Position	FTE
Yes	1
Job	Working as a Manager
Major Gifts Officer II	No
Business Title	Rice Eligibility
Major Gifts Officer II	12 Month Exempt
Grade	Total Classroom Hours
Staff - J	
*Department	Total Office Hours
50400-Development Office	
Reporting Establishment	Tenure Status
William Marsh Rice University LRU	
*Location	Tenure Date
No Rice Location Assigned	mm/dd/yyyy
Mail Stop	Faculty Rank Effective Date
	mm/dd/yyyy
Working at Home	IPEDS Contract Type
No	
Worker Category	Holiday/Recess Daily Hours
Select a value	
	Default Expense Account
	10.50400.100.000000.8345.7(

Continue

ii.   ***Assignment Status:** Select *Active – Payroll Eligible*
iii. **Person Type:** Select *Employee*
iv.   ***Business Unit:** Choose *General* from the drop-down menu.
v.   **Primary Assignment:** Choose value from the drop-down menu.
vi.   **Projected End Date:** Enter date or use calendar to select.
vii. **Position:** Choose value from the drop-down menu
viii. **Synchronize from Position:** Choose value from the drop-down menu.
ix.   **Job:** Choose value from the drop-down menu.
x.   **Business Title:** Enter the Business Title.
xi.   **Grade:** Choose value from the drop-down menu.
xii. ***Department:** Choose value from the drop-down menu.
xiii. **Reporting Establishment:** Choose *William Marsh Rice University LRU*
xiv. ***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**.

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**.
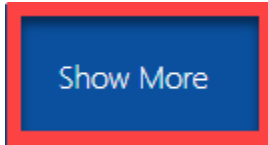
    b. Then select **Change Assignment.**
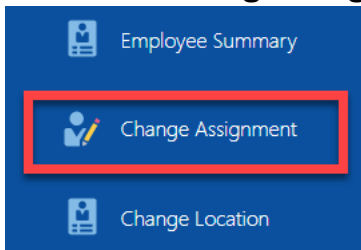
    c. You will be taken to the Change Assignment page. Search for the employee you want to add an assignment in the **Search for a Person field**.
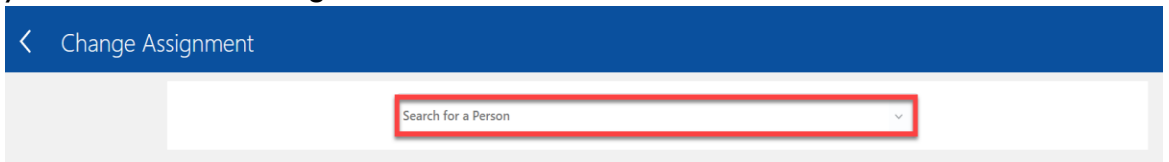
    d. Select the **Check Box** next to the information you want to manage, then select **Continue**. In this example, we will end an assignment; select *Comments and Attachments.*
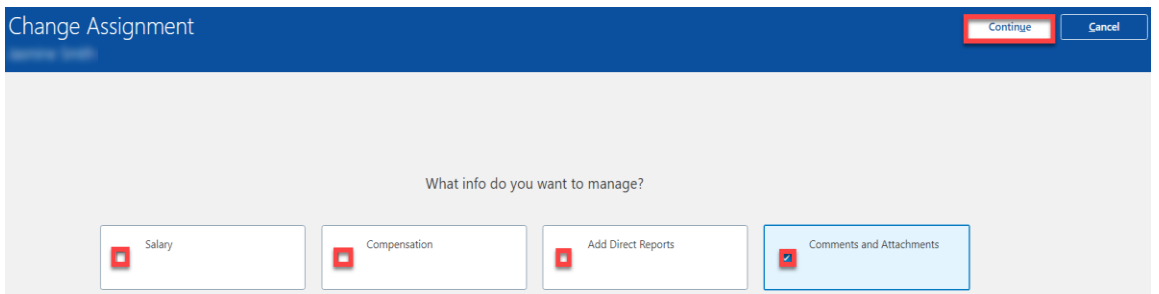
e. Complete the When and Why section, then select **Continue**.

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.

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.*

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**.

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