
End-User Training Guide

Course Code: DPR 321

Course: Departmental HR Recruitment

Course Overview

Course Description

This course provides a comprehensive review of the recruitment processes. Topics include creating a job opening, screening applicants for minimum qualifications and preferences, employment offer and acceptance, preparing for hire, and managing hires.

This course consists of the following modules:

- Module 1: Course Introduction
- Module 2: Recruitment
- Module 3: Course Summary

Training Audiences

The following audience(s), by INFORMS Security role(s) are required to complete this course prior to being granted related system access:

- Department Personnel Representative
- HR Central Administrator Technician
- HR Central Position Administrator
- HR Central Compensation Administrator

Prerequisites

Participants are required to complete the following End-User Training courses prior to starting this course:

- ERP 101 – Overview of INFORMS
- ERP 102 – INFORMS Navigation and Online Help
- HCM 101 – Human Resources Fundamentals

Other related courses

Participants can attend the other related courses to Departmental HR:

- DPR 301 – Departmental HR - ePerformance Management (Employee Performance Evaluation)
- DPR 302 – Departmental HR - Personnel Changes
- DPR 303 – Departmental HR Time Management
- DPR 304 – Departmental HR - Updating Team Information

Delivery Method

This course is intended to be delivered through Instructor-led Training.

Estimated Duration

The total duration of this course, when delivered through Instructor-led Training, is 6 Hours and 30 Minutes

Table of Contents

Content	Page
Module 1: Course Introduction	4
Module 2: Recruitment.....	13
Lesson 1: Create a Job Opening	14
Lesson 2: Candidate Selection	23
Lesson 3: Employment Offer and Acceptance.....	34
Lesson 4: Onboarding Activities.....	45
Module 3: Course Summary	66

Module 1: Course Introduction

Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits of the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 1: Course Introduction

Course Administration and Logistics

To get the most benefit from this course, participants should:

- Actively participate in class, and ask questions as needed
- Please turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

Module 1: Course Introduction

Course Learning Objectives

At the conclusion of this course, participants will be able to:

- Create a Job Opening
- Screen Applicants for Minimum Qualifications and Preferences and Apply Points
- Employment Offer
- Prepare for Hire
- Manage Hire
- Transfer an Employee (Lateral)
- Verify the Employee Transfer

Module 1: Course Introduction

Training Audience:

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

Roles and Responsibilities

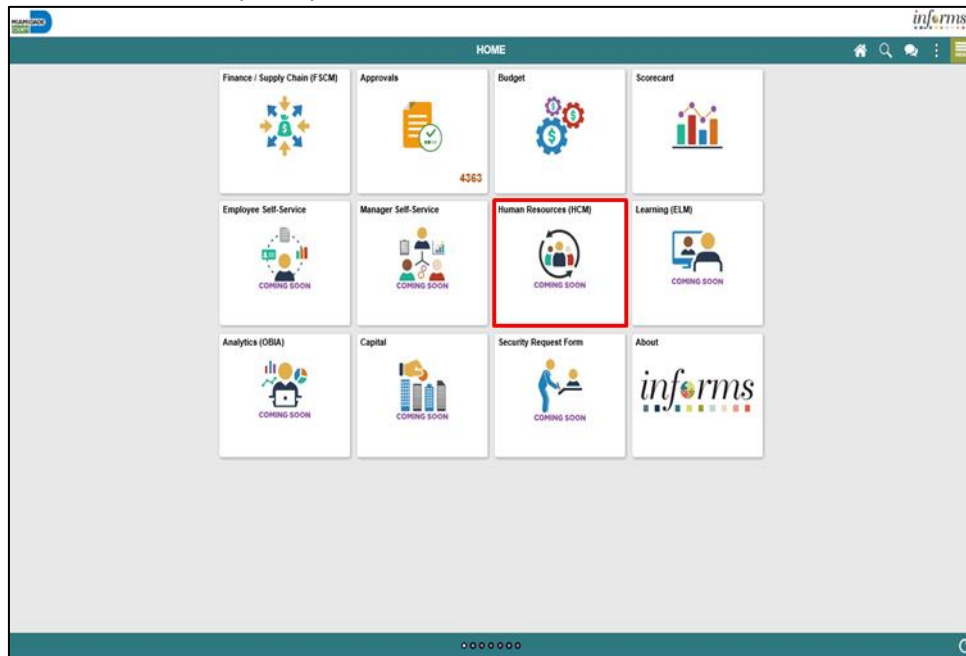
- **Department Personnel Representative:** The Department Personnel Representative is responsible for reviewing and approving Employee Self-Service and Manager Self Service transactions.
- **HR Central Position Administrator:** The HR Central Position Administrator is responsible for creating, reviewing, editing and approving position edits and reporting.
- **HR Central Administrator Technician:** The HR Central Administrator Technician is responsible for Job Data changes. The HR Central Administrator Technician can review and audit Manage Hire transactions.
- **HR Central Compensation Administrator:** The HR Central Compensation Administrator is responsible for Job Code tables, Salary Plan Table, Non-Person Profile, Recruitment Questions-sets and Review/Approve job openings and new position requests within their approval path.

Module 1: Course Introduction

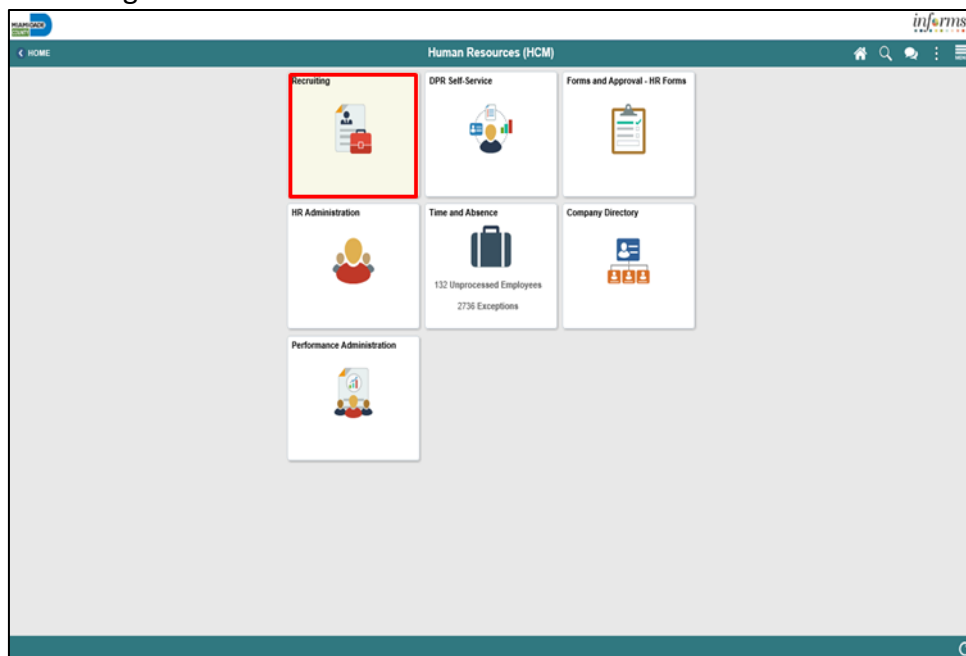
Navigation

Below are the steps to navigate to the Recruiting module, which will be used for navigation in the rest of this course:

1. Human Resource (HCM)



2. Recruiting



Module 1: Course Introduction

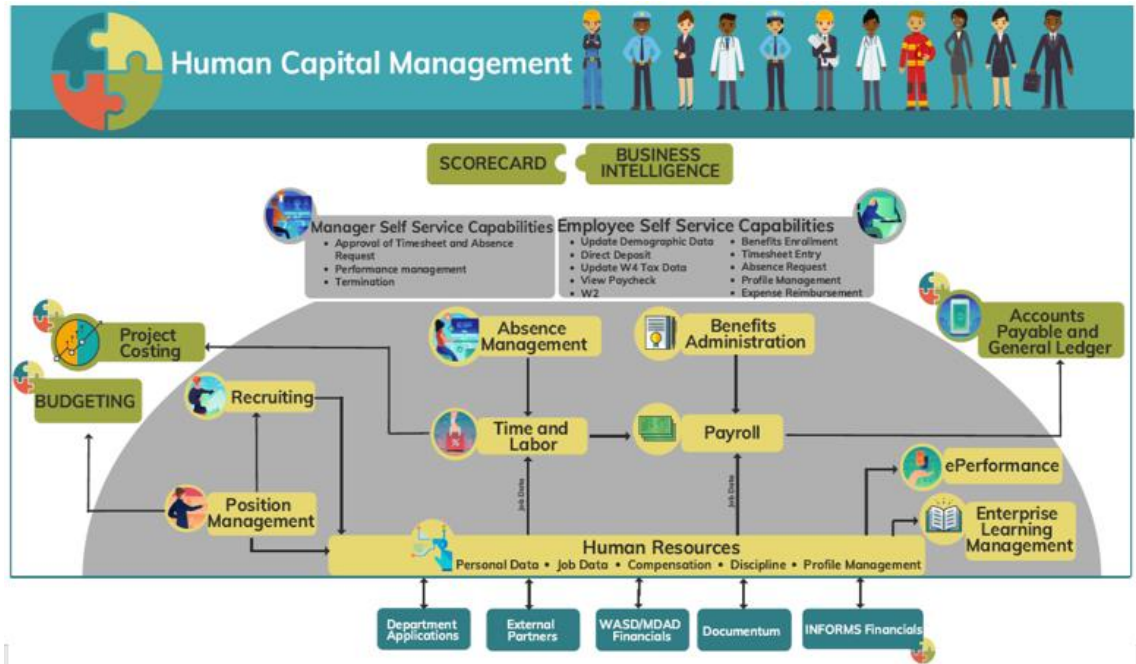
Purpose and Benefits of the Business Process

The purpose and benefits of the INFORMS Recruitment business process include:

- Automation of County business processes.
- Job Opening - Defaults from Position details.
- Default Compensation, Add/Remove Components of Pay and Calculate Adjusted Rate.
- Integrated payment and accounting for expense reimbursement.
- Consolidated Benefit Billing System – LOA, retirees, and benefit billing all in one system.
- Data persistence – INFORMS data is never deleted, only past-effective dated.
- Decreased data redundancy - Perform all recruit to hire activities in a single common system - eliminating manual data re-keying.
- Employee empowerment - employee self-service and manager self-service interfaces are intuitive, easy to use and available on demand on multiple devices and platforms.
- Enhanced data retrieval - rapid pro forma and ad hoc report development and deployment capabilities.
- Robust technical platform – high on-demand availability with minimum downtime, scalable and extensible, rapid deployment of system upgrades, continuous improvement, iterative development, data security.
- Streamlined operations - Automated email notifications, approval routing, consistent business process between Departments, electronic signatures, reduced processing time with online transaction processing, rapid data retrieval via ad hoc query capability, seamless integration between County systems.

Module 1: Course Introduction

The End-to-End Business Process



Module 1: Course Introduction

Introduction to Demonstrations and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

Instructor Demo



Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. Instructors will demonstrate how to perform these activities while users follow along.

Training Activities



Users will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

Training Exercises



The instructor will ask questions related to the lecture content and training activities, which are used to check users' knowledge and understanding of course content.

Module 1: Course Introduction

Module 1:
Course
Introduction
Summary

The following key concepts were covered in this module:

- Course Introduction

Module 2: Recruitment

Module 2: Recruitment

This module includes the following lessons:

- Create a Job Opening
- Candidate Selection
- Employment Offer and Acceptance
- Onboarding Activities
- Reports and Queries

Lesson 1: Create a Job Opening

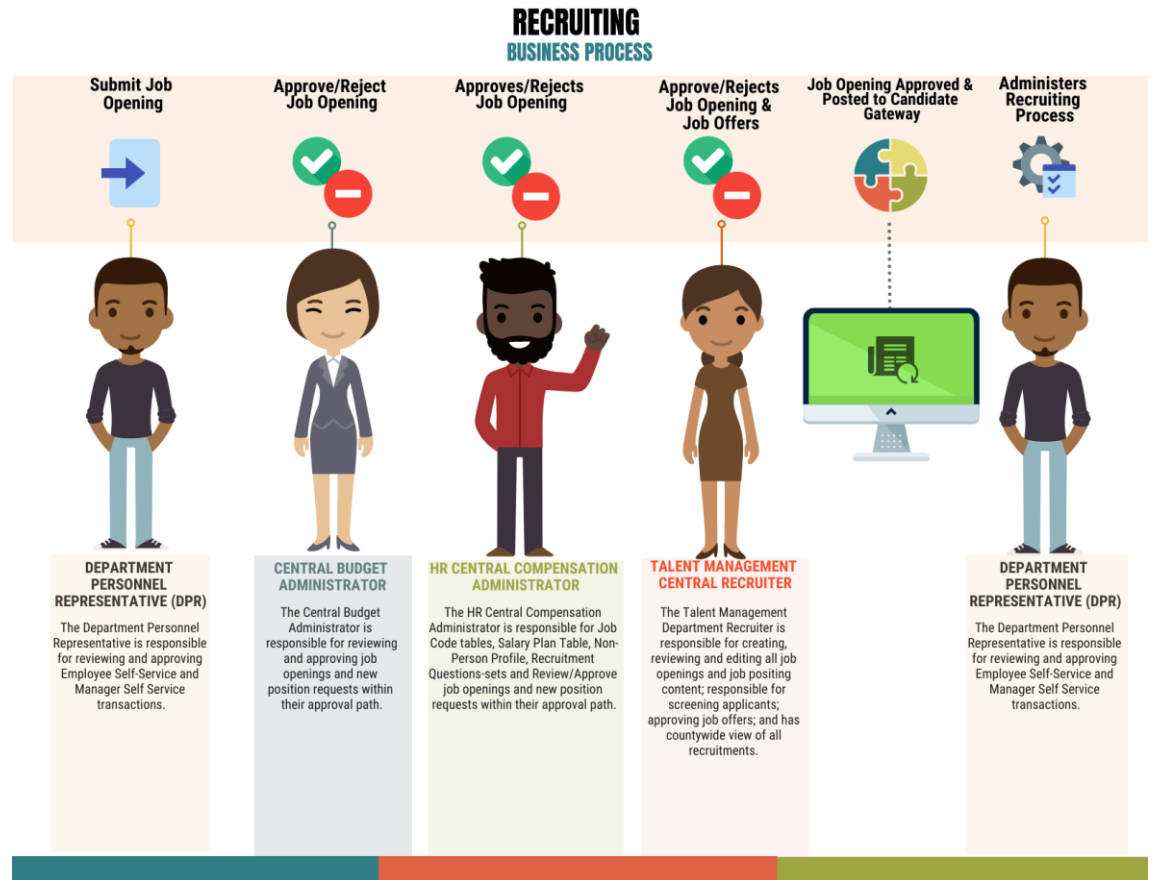
Lesson 1: Overview

At the conclusion of this lesson, the user will be able to:

- Create a Job Opening

Lesson 1: Create a Job Opening

Lesson 1: Introduction



In the Recruitment business process, job openings are created, approved, and posted for advertisement. This lesson will review opening a job and selecting a posting location and duration.

Job openings are created from positions. The position details are automatically populated for job openings. A new position does not need to be created each time there is a new job opening. Departments can work with Central HR for enhanced applicant screening.

Lesson 1: Create a Job Opening

Key Terms

The following key terms are used in this module:



Term	Definition
Recruiting Location	The location in which the job will be performed. When jobs are posted, the recruiting location is visible to applicants.
Job Profile	The set of competencies and responsibilities that apply to workers in the same job, position, or salary grade.
Recruitment Contact	The HR Central Recruitment contact for the open job.
Recruitment Area	The location in which the interview will take place.
Recruiter	The department's representative and contact for the open job.
Relative Open Date	The date in which a job will be visible to applicants in relation to the approval date. The system calculates the posting date and displays it in the Post Date field, which becomes unavailable for entry.

Lesson 1: Create a Job Opening

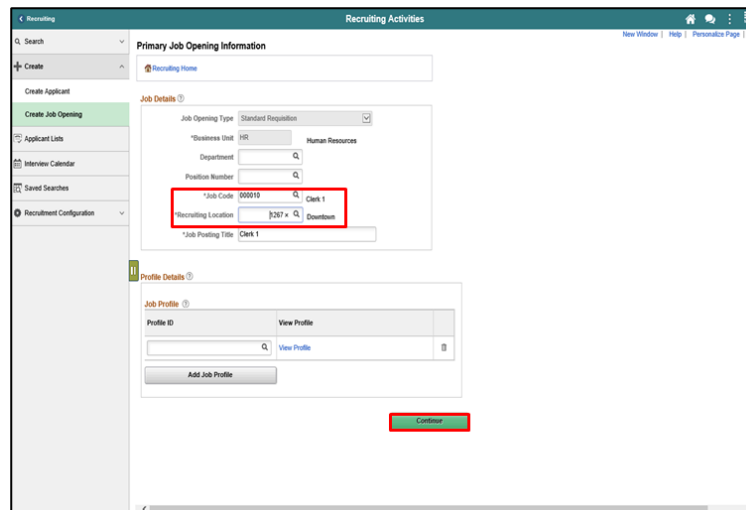
Lecture 1: Create a Job Opening

This lesson will review how to create a job opening. Departments can attach the question sets specific to the job opening in the advertisement with compensation approval and work with Central HR for enhanced screening.

Note: To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

1. Select the **Create** pane.
2. Select the **Create Job Opening** pane.
3. Input or search for the **Job Code**.
4. Input or search for the **Recruiting Location** number.
5. Select the **Continue** button.



The screenshot shows the 'Recruiting Activities' interface. On the left is a navigation menu with options like 'Create Applicant', 'Create Job Opening', 'Applicant Lists', 'Interview Calendar', 'Saved Searches', and 'Recruitment Configuration'. The main area is titled 'Primary Job Opening Information'. It contains several input fields: 'Job Opening Type' (Standard Requisition), '*Business Unit' (HR), 'Department' (Human Resources), 'Position Number', '*Job Code' (00010), 'Recruiting Location' (2267), and '*Job Posting Title' (Clerk 1). A red box highlights the 'Job Code' and 'Recruiting Location' fields. Below this is a 'Profile Details' section with a 'Job Profile' dropdown and a 'View Profile' button. At the bottom right, there is a red 'Continue' button.

6. Input or search for the **Position Number**.

Adding the **Recruiter** and **Hiring Manger** details allows the user to have a complete view of the hiring process. This also allows for detailed reporting, transparency, and tracking.

7. Select the **Add Recruiter** button.
8. Input or search for the **Name** details.
9. Select the **Add Hiring Manager** button.
10. Input or search for the **Name** details.
11. Select the **Add Job Posting** button.

Lesson 1: Create a Job Opening

Lecture 1: Create a Job Opening

12. Select the applicable **Destination** from the list.
13. Select the applicable **Posting Type** from the list.
14. Input the posting duration details.
 - a. Select the **Relative Open Date** from the list, if applicable.
 - b. Input the **Post Date**, if applicable.
 - c. Input the **Remove Date**, if applicable.
 - d. Input the **Posting Duration**, if applicable.

When utilizing a **Relative Open Date**, the **Posting Duration** need to be input OR the **Remove Date** needs to be input.

When not utilizing the **Relative Open Date** field, the **Post Date** needs to be input.

When the **Post Date** is input, the **Remove Date** OR the **Posting Duration** needs to be added.

The **Posting Duration** assists in calculating the **Remove Date** based on the **Post Date**.

Lesson 1: Create a Job Opening

Lecture 1: Create a Job Opening

Note: If posting in more than one location, repeat steps 11-16.

15. Select the **OK** button.
16. Select the **Save and Submit** button.

Note: Select the **Approvals** tab to review pending approvals.

Lesson 1: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario DPR will be creating a job opening for recruitment purposes.

Instructions This activity is will be performed individually; the user must complete it on the user classroom workstation using the INFORMS training environment. The Instructor will tell the user how to log into INFORMS.

The user will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if the user have questions.

Lesson 1: Training Exercise

Debrief



1. Does every job opening require the creation of a new position?

2. Does a job opening require a position?

Lesson 1: Create a Job Opening

Lesson Summary

Having completed the Create a Job Opening lesson, users should be able to:

- Create a Job Opening



Lesson 2: Candidate Selection

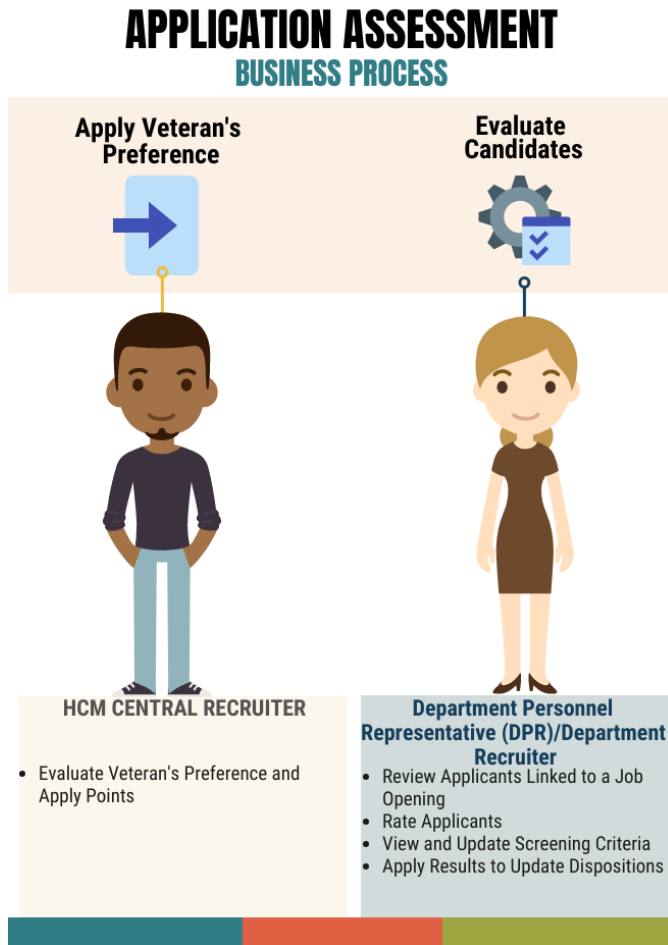
Lesson 2: Overview

At the conclusion of this lesson, the user will be able to:

- Screen Applicants for Minimum Qualifications and Preferences then Apply Results

Lesson 2: Candidate Selection

Lesson 2: Introduction



Once the job opening has closed the HCM Central Recruiter will review applicants and apply Veteran's Preference points to applicants that are claiming preference. The applicants must submit Veteran's Preference documentation before Central Recruiter can award points. This preference will be visible to the department recruiter when reviewing applicants.

The department recruiter will start the screening process to develop an eligible candidate pool for interview consideration. Once the minimum qualifications screening process has been completed, results will be applied in the system.

Lesson 2: Candidate Selection

Key Terms

The following key terms are used in this module:



Term	Definition
Veteran's Preference Points	Veteran' Preference Points are awarded based on the documentation provided by the candidate to HR Central Recruitment.

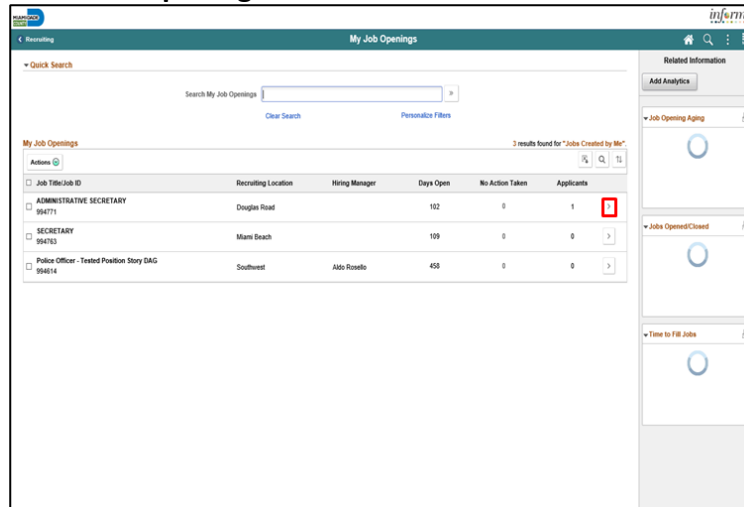
Lesson 2: Candidate Selection

Lecture 1: Screen Applicants for Minimum Qualifications and Preferences then Apply Results

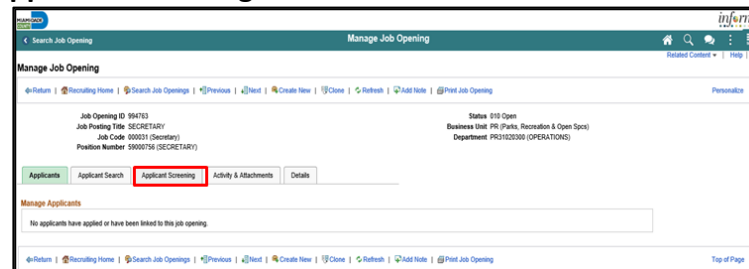
Note: To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > My Job Openings**

1. Select the **View Job Opening** button.



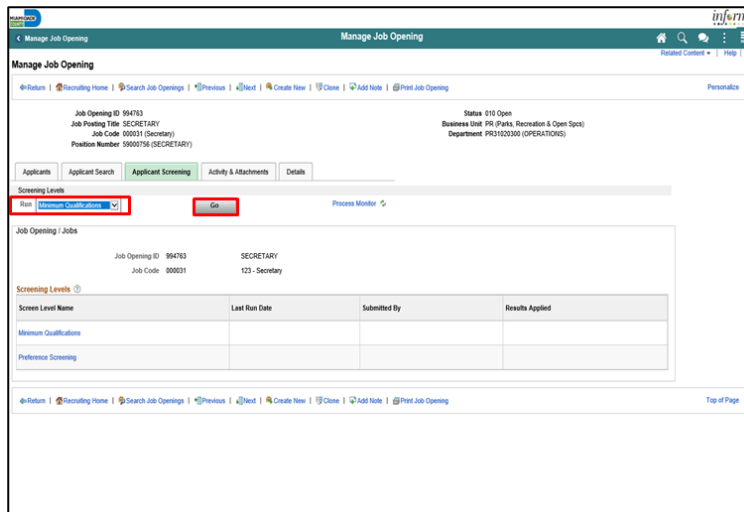
2. Select the **Applicant Screening** tab.



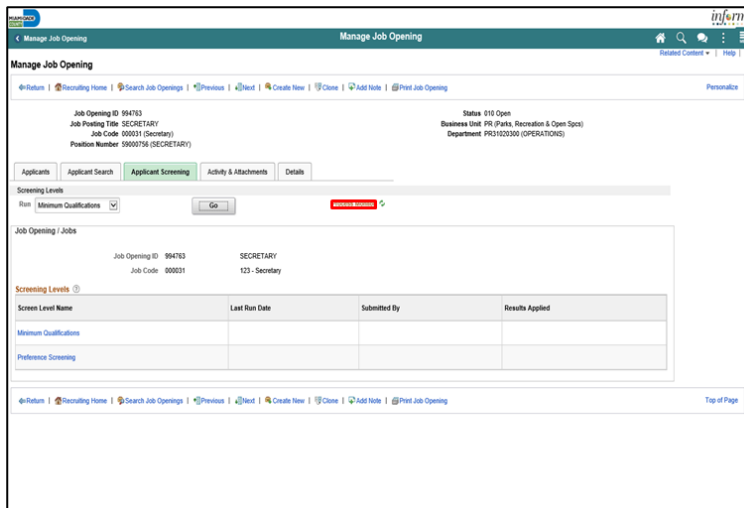
Lesson 2: Candidate Selection

Lecture 1:
Screen Applicants for Minimum Qualifications and Preferences then Apply Results

3. Select the **Run** list.
4. Select the **Minimum Qualifications** list item.
5. Select the **Go** button.



7. Select the **Process Monitor** link.



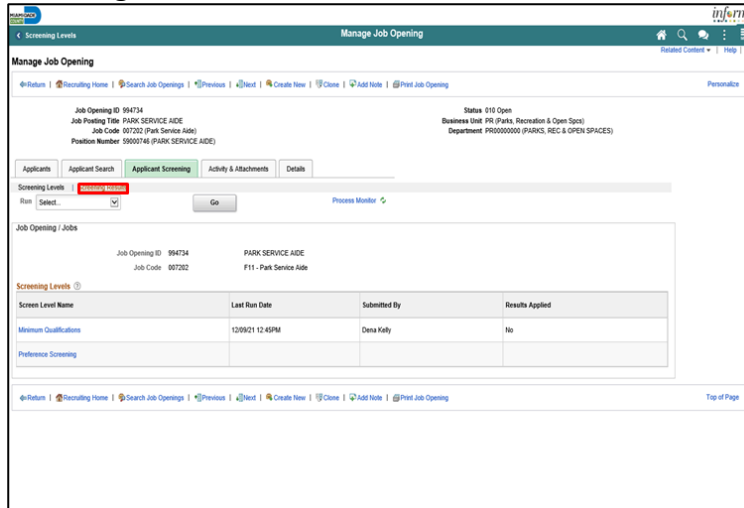
Note: A new window will open. Select the Refresh button until Run Status = Success and Distribution Status = Posted.

Lesson 2: Candidate Selection

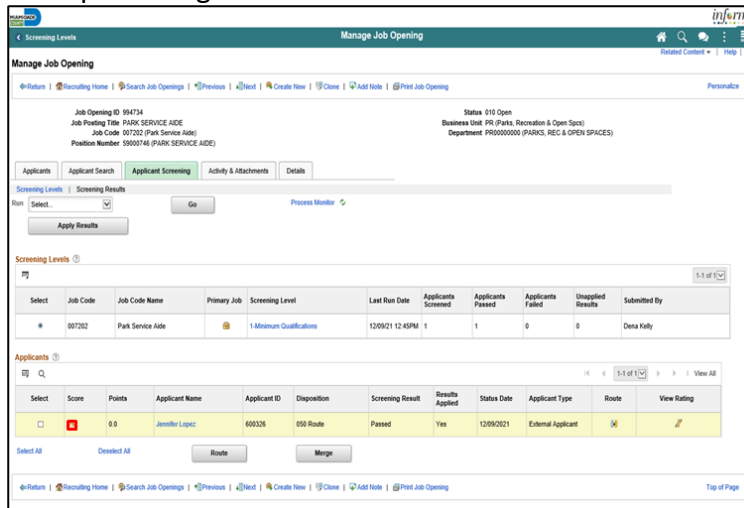
Lesson 2: Candidate Selection

Lecture 1:
Screen Applicants for Minimum Qualifications and Preferences then Apply Results

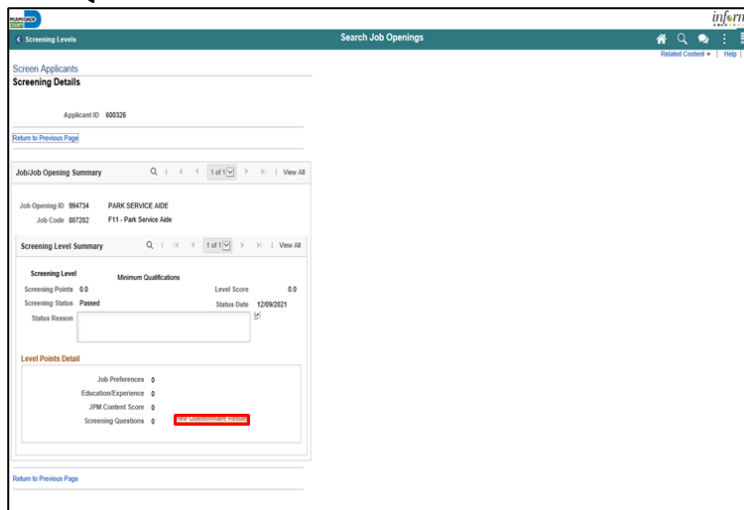
8. Select the **Screening Results** link.



9. Select the **Score** percentage link.



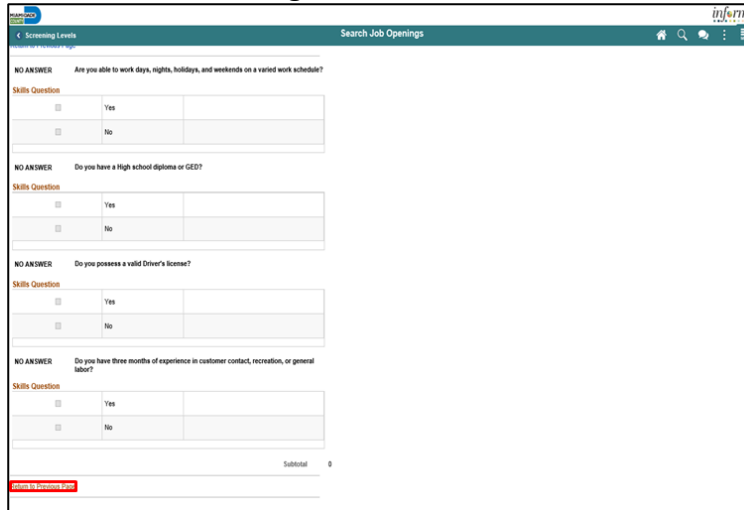
18. Select the **View Questionnaire Results** link.



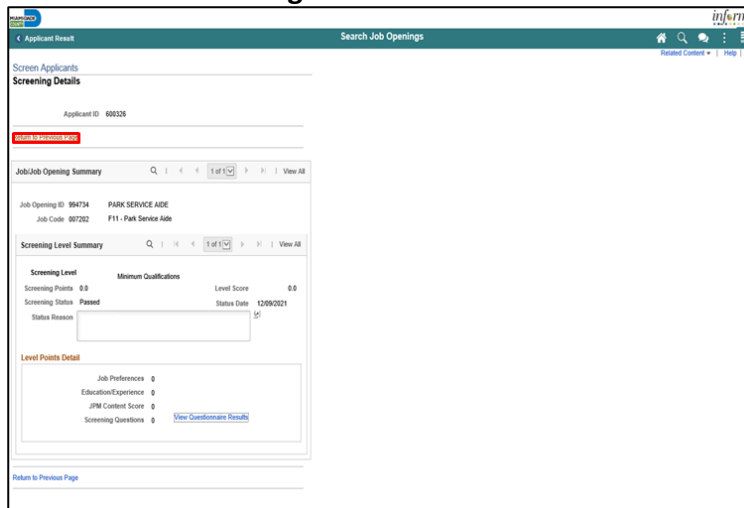
Lesson 2: Candidate Selection

Lecture 1:
Screen Applicants for Minimum Qualifications and Preferences then Apply Results

19. Select the **Return to Previous Page** link.



20. Select the **Return to Previous Page** link.

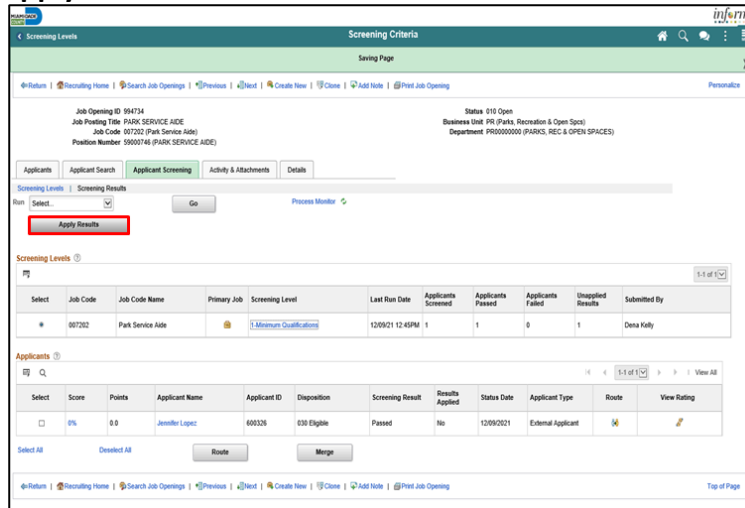


Lesson 2: Candidate Selection

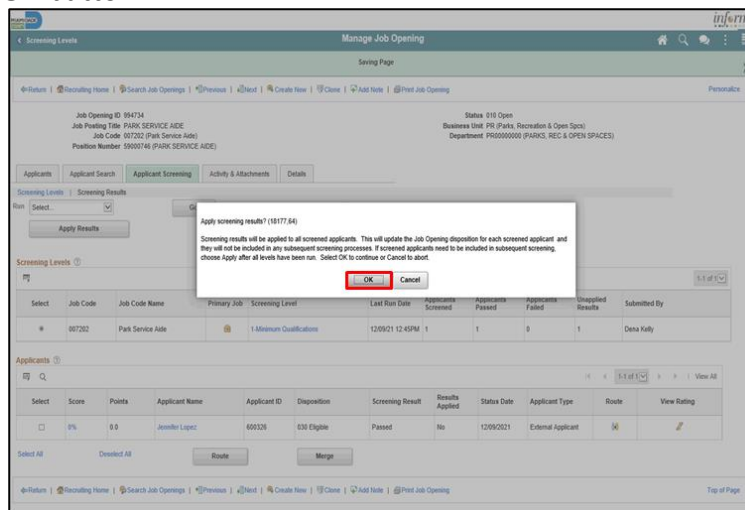
Lecture 1: Screen Applicants for Minimum Qualifications and Preferences then Apply Results

Note: Once results are applied to the candidate, they are permanent and cannot be undone.

21. Select the **Apply Results** button.



22. Select the **OK** button.



Lesson 2: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario Applicants have applied to a job posting and the DPR needs to screen applicants, apply preferences as applicable, and apply results.

Instructions This activity is will be performed individually; the user must complete it on the user classroom workstation using the INFORMS training environment. The Instructor will tell the user how to log into INFORMS.

The user will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if the user have questions.

Lesson 2: Training Exercise

Debrief



1. Are additional preferences always applicable to a job opening?

2. Who awards Veteran’s Preference Points?

Lesson 2: Lesson Summary

Lesson Summary



Now that the user have completed the lesson, the user should be able to:

- Screen applicants for minimum qualifications and preferences then apply results

Lesson 3: Employment Offer and Acceptance

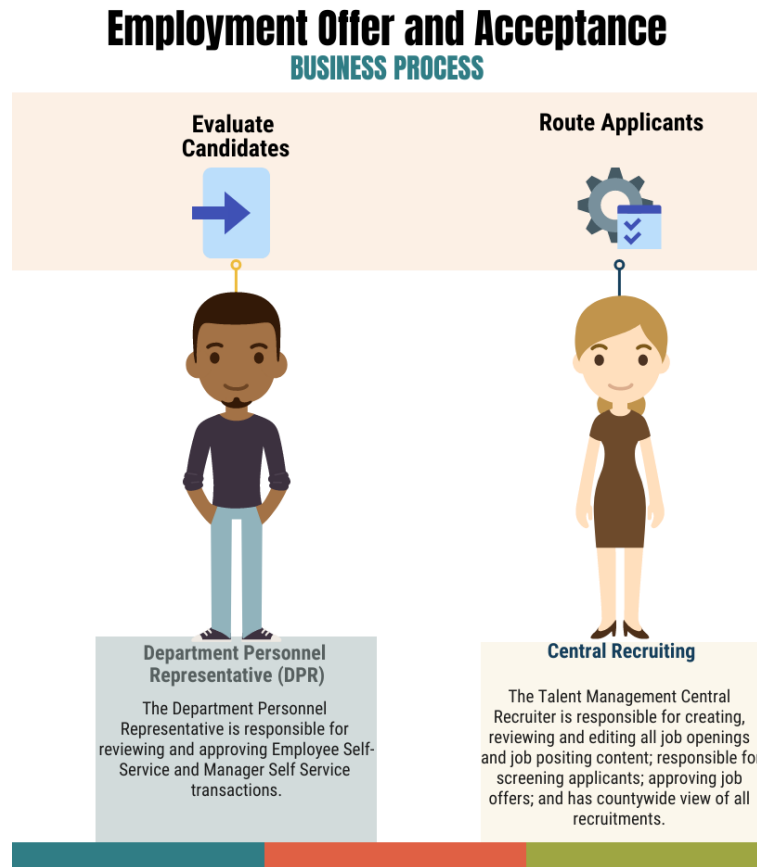
Lesson 3: Overview

At the conclusion of this lesson, the user will be able to:

- Create a job offer

Lesson 3: Employment Offer and Acceptance

Lesson 3: Introduction



This is where an employment record instance is created in INFORMS. The employment record is the central piece to the employee and serves as the foundation to other modules within the system including pay, leave, benefits, and retirement.

Applicant and job information is automatically transferred to the manage hire template to reduce manual entry.

Lesson 3: Employment Offer and Acceptance

Key Terms

The following key terms are used in this module:



Term	Definition
Base Salary	The amount of money a salaried employee regularly earns before any additions or deductions are applied to their earnings
Candidate Status	The status of the candidate during the pre-employment process. The candidate status identifies the various steps of department specific pre-employment activities.

Lesson 3: Employment Offer and Acceptance

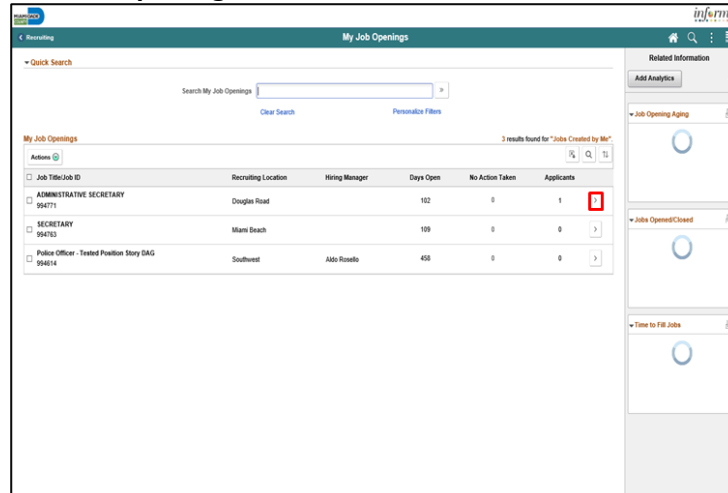
Lecture 1: Employment Offer

This lesson will review creating a job offer.

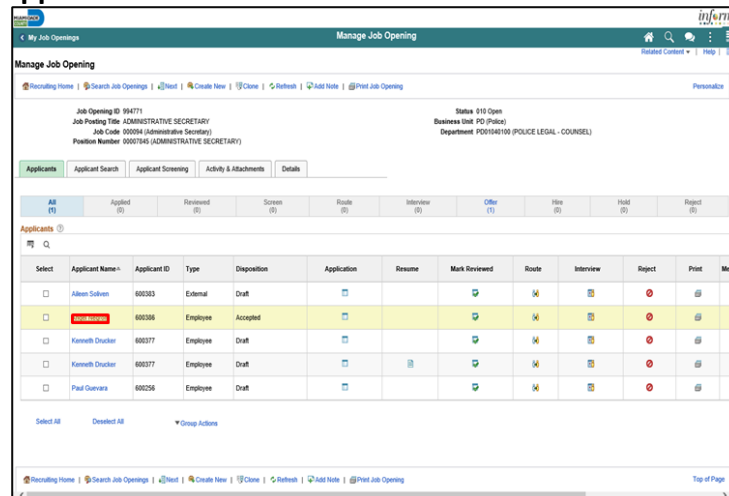
Note: To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > My Job Openings**

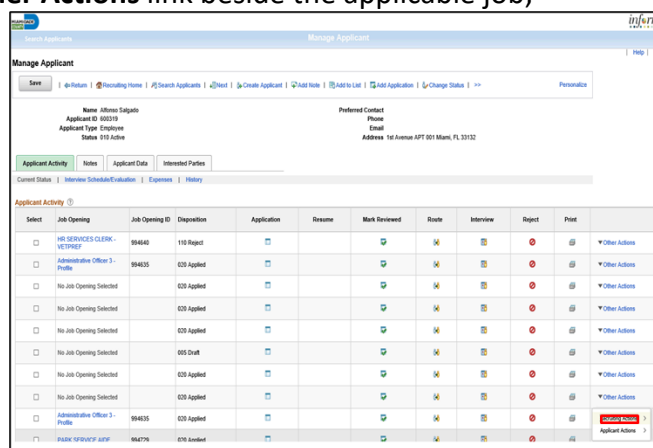
1. Select the **View Job Opening** button.



2. Select the **Applicant's** name.



1. Select the **Other Actions** link beside the applicable job,



Lesson 3: Employment Offer and Acceptance

Lesson 3: Employment Offer and Acceptance

Lecture 1: Employment Offer

11. Input applicable details in the **Comments** field.
12. Select the **Submit for Approval** link.

The screenshot shows the 'Prepare Job Offer' interface. At the top right, there is a 'Submit for Approval' link highlighted with a red box. Below the job details, there is a 'Comments' section with a text input field highlighted by a red box. The form includes fields for Job Opening, Position Number, Job Code, Hiring Manager, Recruiter, Status, Reason, Business Unit, Offer Date, Start Date, Offer Expiration Date, Applicant Type, and Preferred Contact. There is also a table for 'Job Offer Components' and an 'Offer Letter' section.

13. Select the **OK** button.

The screenshot shows the same 'Prepare Job Offer' interface, but now a confirmation message is displayed in the center: 'You have successfully submitted Alonso Salgado's job offer. (0.0)'. The 'OK' button on this message is highlighted with a red box. The background form is dimmed.

Note: All job offers must be approved by Central Recruitment.

Lesson 3: Employment Offer and Acceptance

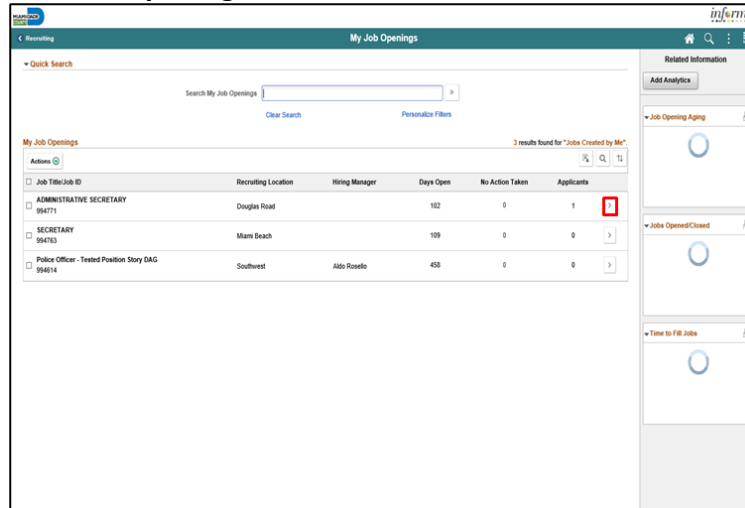
Lecture 2:
Update
Candidate
Status

Upon acceptance of the job offer, the candidate’s status must be changed. Accurate candidate statuses allow for detailed reporting and tracking of the candidate.

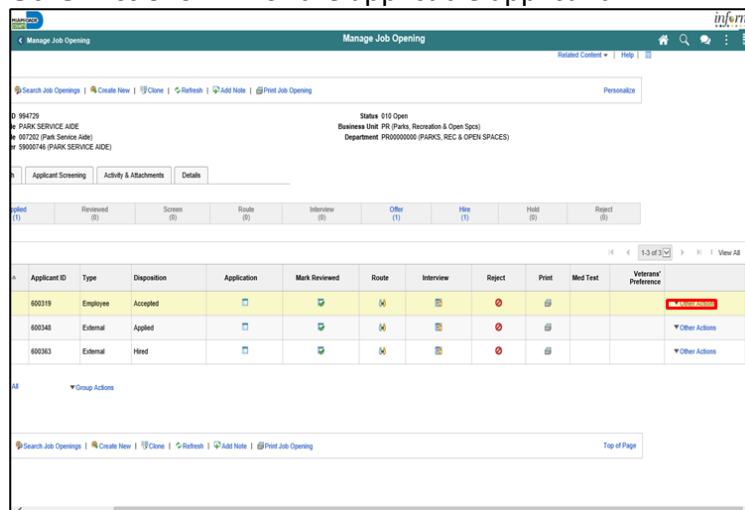
Note: To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > My Job Openings**

1. Select the **View Job Opening** button.



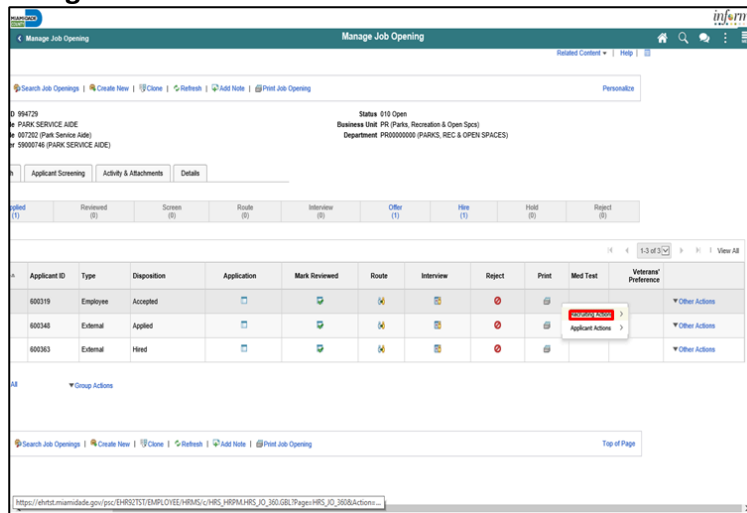
2. Select the **Other Actions** link for the applicable applicant.



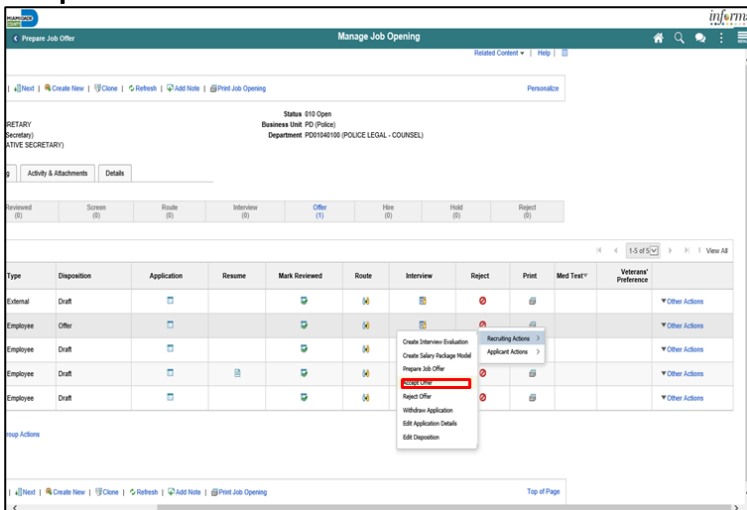
Lesson 3: Employment Offer and Acceptance

3. Select Recruiting Actions.

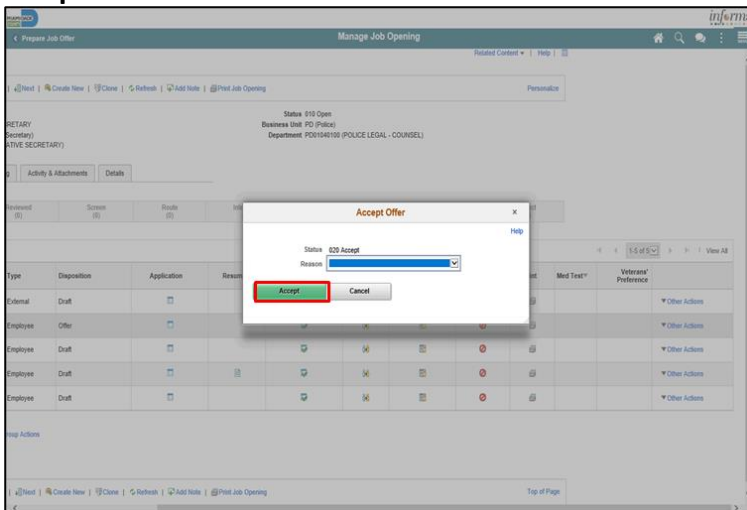
Lecture 2:
Update
Candidate
Status



4. Select the Accept Offer link.



5. Select the Accept button.



Lesson 3: Employment Offer and Acceptance

6. Select the OK button.

Lecture 2:
Update
Candidate
Status

The screenshot displays the 'Manage Job Opening' interface. At the top, it shows the job opening details: Job Opening ID 994771, Job Posting Title ADMINISTRATIVE SECRETARY, Job Code 600094 (Administrative Secretary), Position Number 60007845 (ADMINISTRATIVE SECRETARY), Status: 618 Open, Business Unit PD (POLICE), and Department: PD0104100 (POLICE LEGAL - COUNSEL).

Below the details is a table of applicants. The table has columns for Applicant Name, Applicant ID, Type, Disposition, and various action buttons. The first row shows Alexia Sobron (Applicant ID 600283) with a Disposition of 'Draft'. The second row shows Angel Negron (Applicant ID 600385) with a Disposition of 'Accepted'. The third row shows Kenneth Drucker (Applicant ID 600277) with a Disposition of 'Draft'. The fourth row shows Kenneth Drucker (Applicant ID 600277) with a Disposition of 'Draft'. The fifth row shows Paul Quaresima (Applicant ID 600256) with a Disposition of 'Draft'.

A confirmation dialog box is overlaid on the table, displaying the message: 'You have successfully accepted the offer: (18178,1182)'. The 'OK' button in the dialog box is highlighted with a red rectangle.

Select	Applicant Name	Applicant ID	Type	Disposition	Reviewed	Route	Interview	Reject	Print	Mod
<input type="checkbox"/>	Alexia Sobron	600283	External	Draft						
<input type="checkbox"/>	Angel Negron	600385	Employee	Accepted						
<input type="checkbox"/>	Kenneth Drucker	600277	Employee	Draft						
<input type="checkbox"/>	Kenneth Drucker	600277	Employee	Draft						
<input type="checkbox"/>	Paul Quaresima	600256	Employee	Draft						

Lesson 3: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario The DPR creates a job offer for a candidate.

Instructions This activity is will be performed individually; the user must complete it on the user classroom workstation using the INFORMS training environment. The Instructor will tell the user how to log into INFORMS.

The user will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if the user have questions.

Lesson 3: Training Exercise

Debrief



1. Must job offers be approved by Central Recruitment?

2. What frequency is the is used for the Base Salary?

Lesson 3: Employment Offer and Acceptance

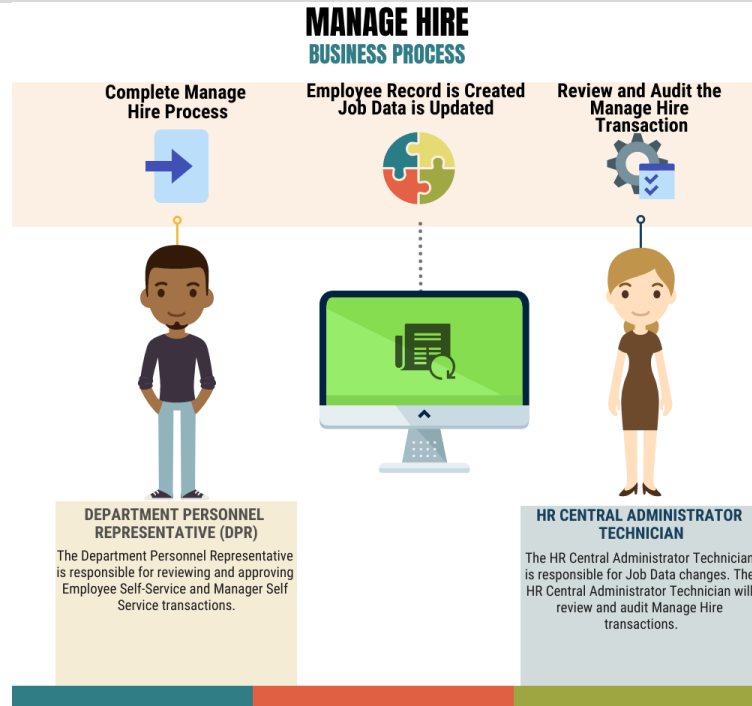
Lesson Summary Now that the user have completed the lesson, the user should be able to:



- Create an Employment Offer
- Update Candidate Status

Lesson 4: Onboarding Activities

Lesson 4: Introduction



This process is used to generate an Employee ID and manage the employee throughout its lifetime. Any documentation provided during the application process, such as degrees and certifications, is transferred over to the employee profile.

Central Human Resources will review and audit all manage hire activity on a daily basis.

Lesson 4: Onboarding Activities

Key Terms



The following key terms are used in this module:

Term	Definition
Employee Profile	The central location of an individual's attributes. The profile tracks employees' skills, competencies, and accomplishments. It can be utilized in career planning, for identifying training needs, for performance management and in the recruitment process for checking minimum job requirements.
Time Reporter Type	Determines the information of an employee must provide for work hours on the timesheet, Punched or Elapsed.
Time Reporting Template	Determines fields used for time entry. There is an Elapsed Time Reporting Template and a Punch Time Reporting Template.
Workgroup	Grouping of employees that share common Time and Labor attributes and rules.
Taskgroup	A taskgroup identifies the valid, default time reporting templates, task template, and task profile(s) for employee's with the same task reporting requirements. Each employee must be associated with one taskgroup.

Lesson 4: Onboarding Activities

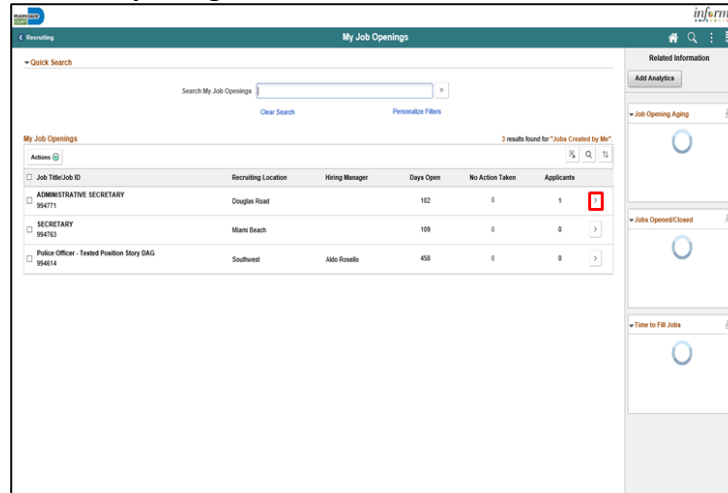
Lecture 1: Preparing for Hire

This lesson will review preparing for hire.

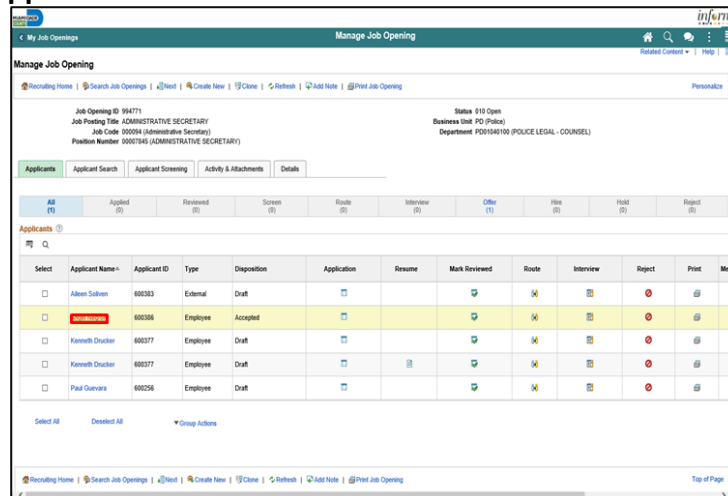
Note: To view all job openings navigate to **Human Resources (HCM) > Recruiting > Recruiting Activities**

Navigate to **Human Resources (HCM) > Recruiting > My Job Openings**

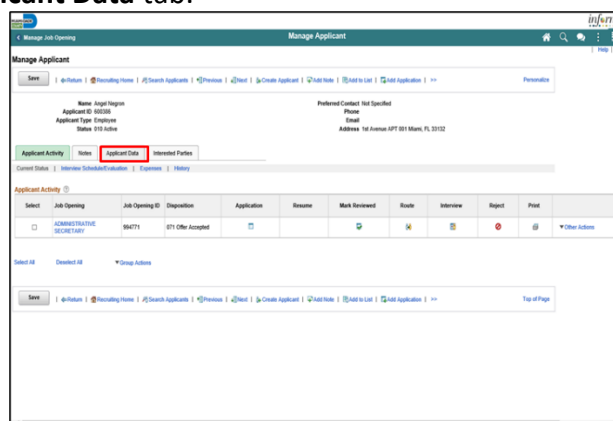
1. Select the **View Job Opening** button.



2. Select the **Applicant's** name.



3. Select the **Applicant Data** tab.



Lesson 4: Onboarding Activities

Lecture 1: Preparing for Hire

4. Select the **Eligibility & Identity** link.

The screenshot shows the 'Manage Applicant' page for Angel Negron. The 'Applicant Data' tab is active, and the 'Eligibility & Identity' link in the navigation bar is highlighted. The page displays fields for Applicant Type (Employee), Employee ID (00022097), Status Code (Active), and Status Date (01/06/2022). There are also sections for Name (First: Angel, Middle: L, Last: Negron) and Address (1st Avenue APT 001 Miami, FL 33132).

5. Click the **Add National Identification** button.

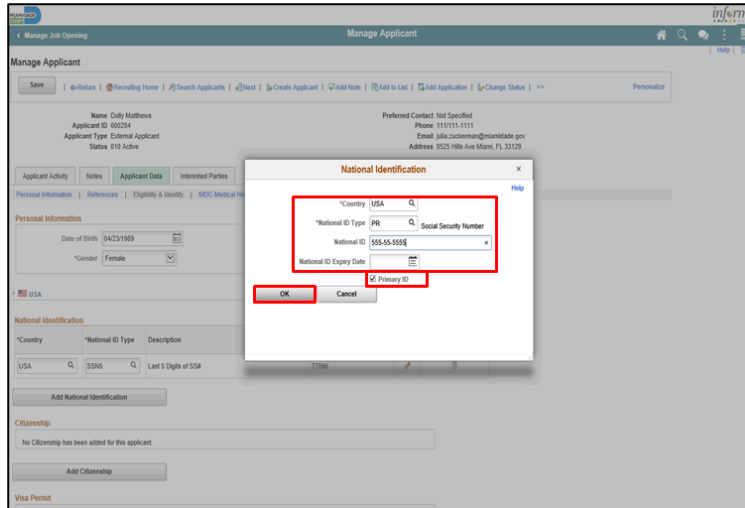
The screenshot shows the 'Manage Applicant' page for Odly Matthews. The 'Eligibility & Identity' tab is active. The 'Personal Information' section shows Date of Birth (04/23/1989), Gender (Female), and Marital Status (Unknown). Below this, there is a table for National Identification with one entry for USA (SSNS) with National ID 77096. The 'Add National Identification' button is highlighted with a red box.

*Country	*National ID Type	Description	National ID		
USA	SSNS	Last 5 Digits of SSN	77096		

Lesson 4: Onboarding Activities

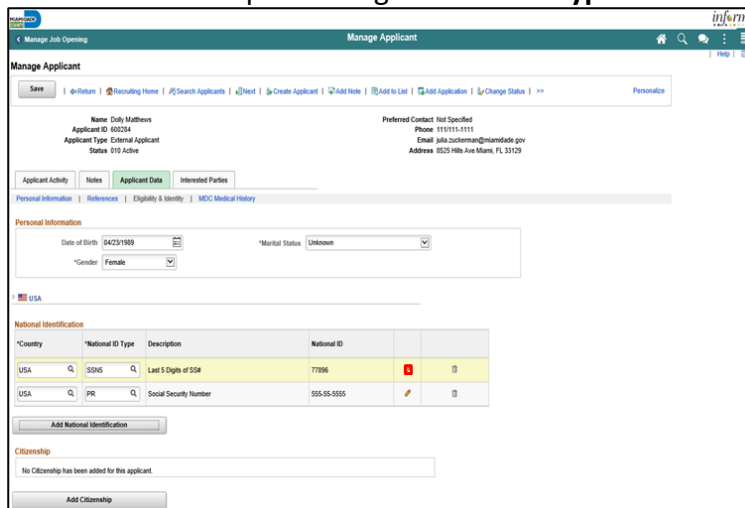
Lecture 1: Preparing for Hire

11. Input or search for the **Country**.
12. Input or search for the **National ID Type**.
13. Input the **National ID** for the applicant.
14. Select the **Primary ID** checkbox.
15. Select the **OK** button.



Note: Confirm only one National Identification entry has been selected as the Primary ID. The applicant may have entered an SSN5 that is automatically flagged and must be removed as the Primary ID.

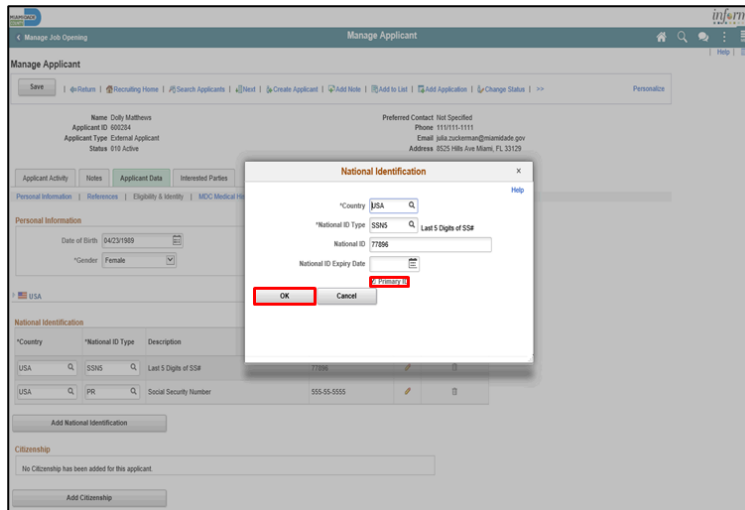
16. Select the **Edit** button on the preexisting **National ID Type**.



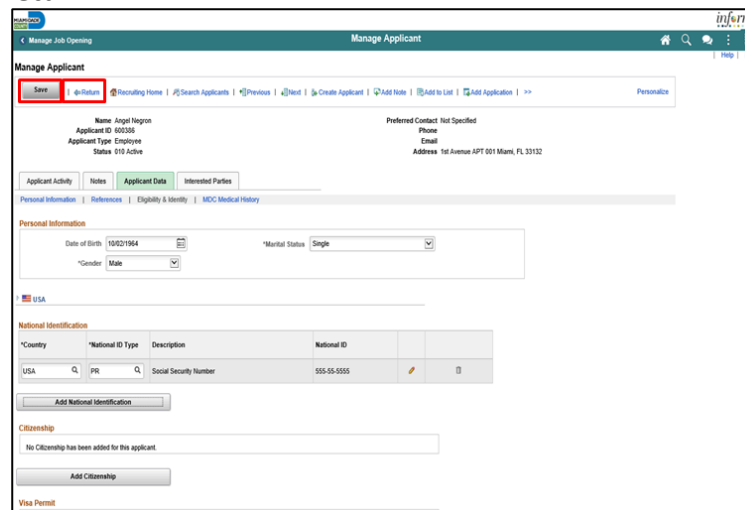
Lesson 4: Onboarding Activities

Lecture 1: Preparing for Hire

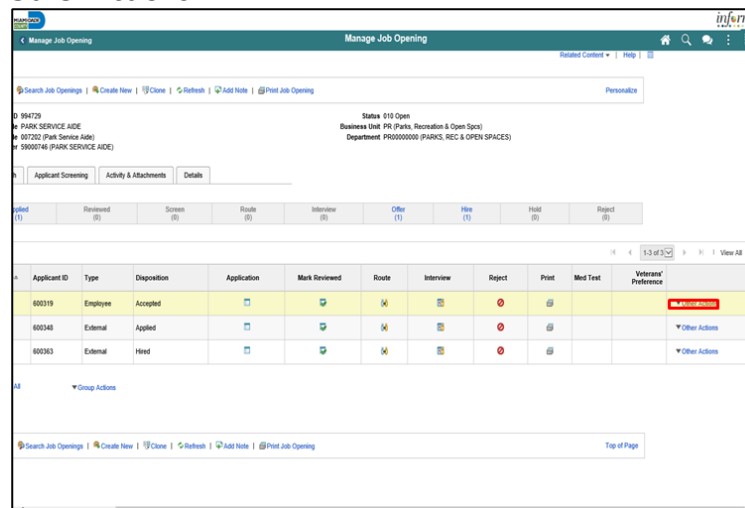
17. Select the **Primary ID** checkbox.
18. Select the **OK** button.



19. Select the **Save** button.
20. Select the **Return** link.



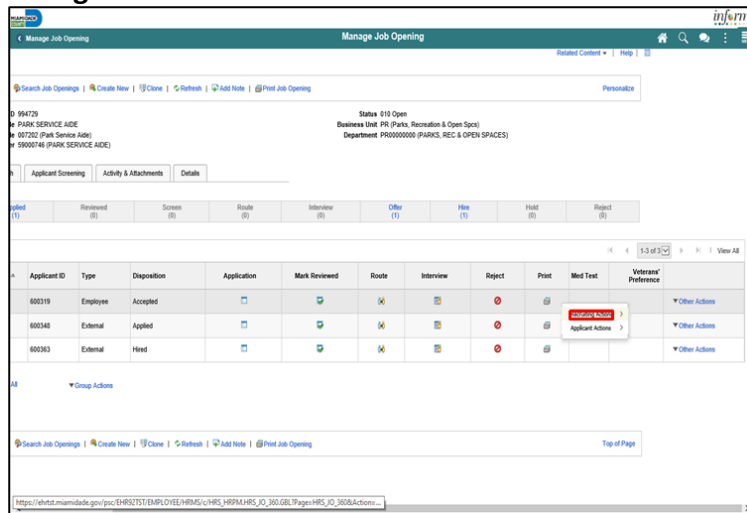
21. Select the **Other Actions** link.



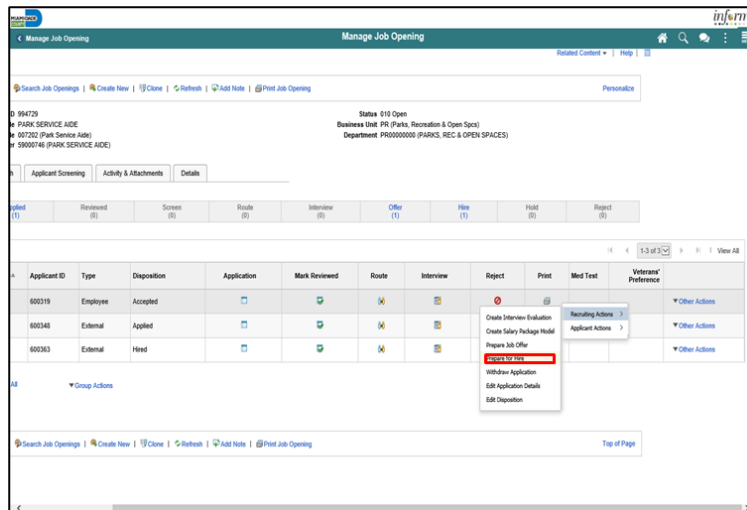
Lesson 4: Onboarding Activities

Lecture 1: Preparing for Hire

22. Select Recruiting Actions.

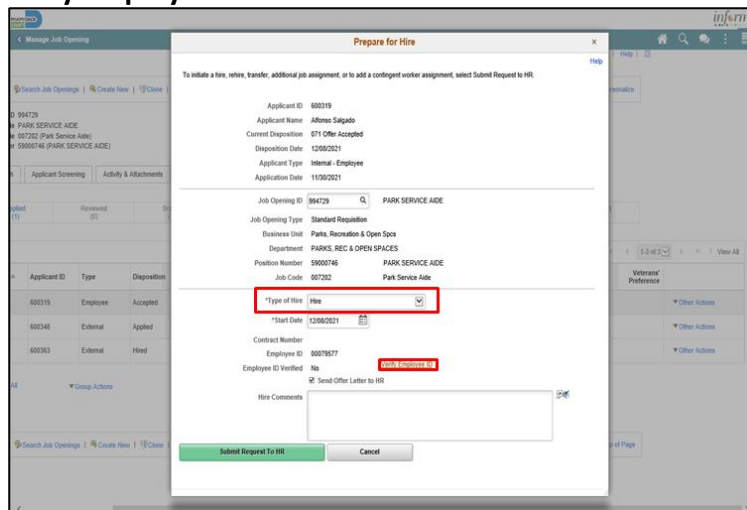


23. Select Prepare for Hire.



24. Select the applicable Type of Hire from the list.

25. Select the Verify Employee ID link.

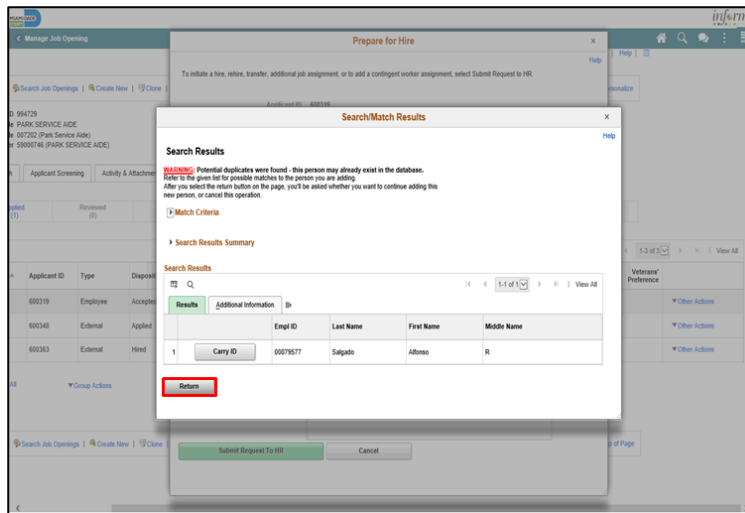


Note: Confirm the applicant does not exist in the system.

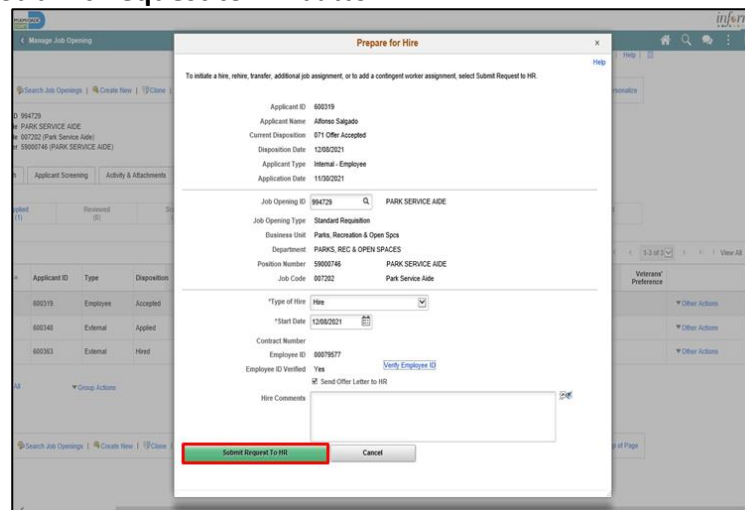
Lesson 4: Onboarding Activities

Lecture 1: Preparing for Hire

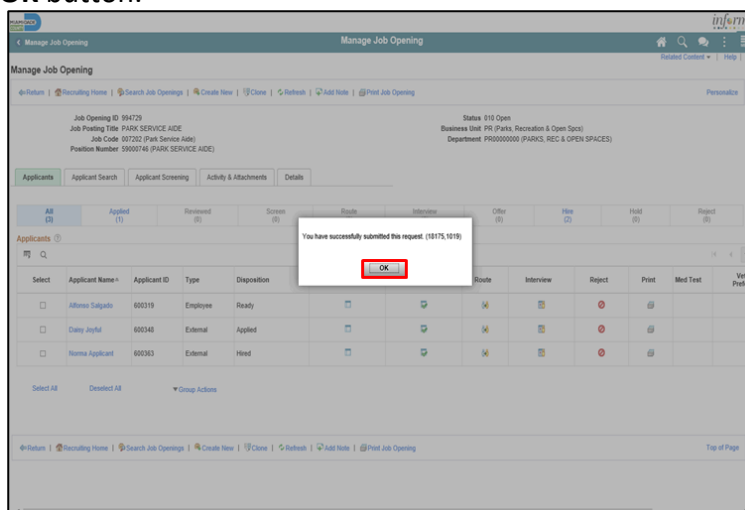
26. Select the **Return** button.



27. Select the **Submit Request to HR** button.



28. Select the **OK** button.



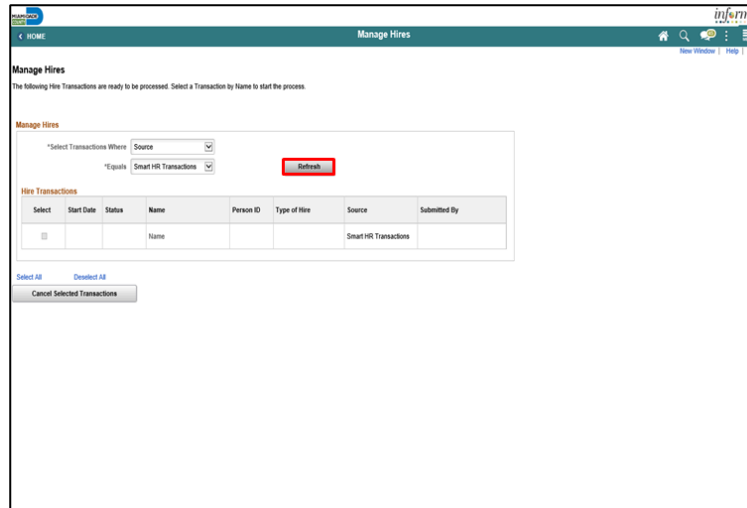
Lesson 4: Onboarding Activities

Lecture 2: Manage Hire

This lesson will review managing new or rehired employee.

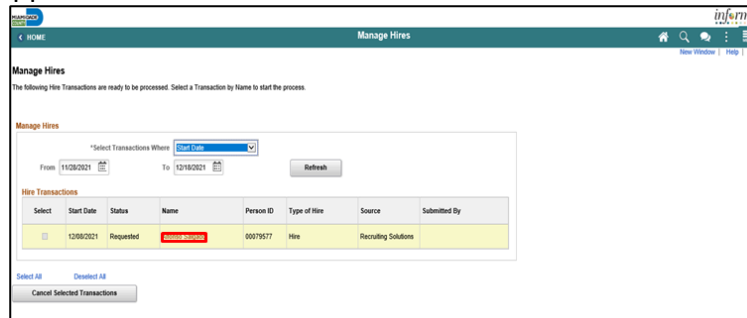
Navigate to **NavBar > Navigator > Human Resources (HCM) > Workforce Administration > Personal Information > Manage Hire**

1. Select the **Refresh** button.



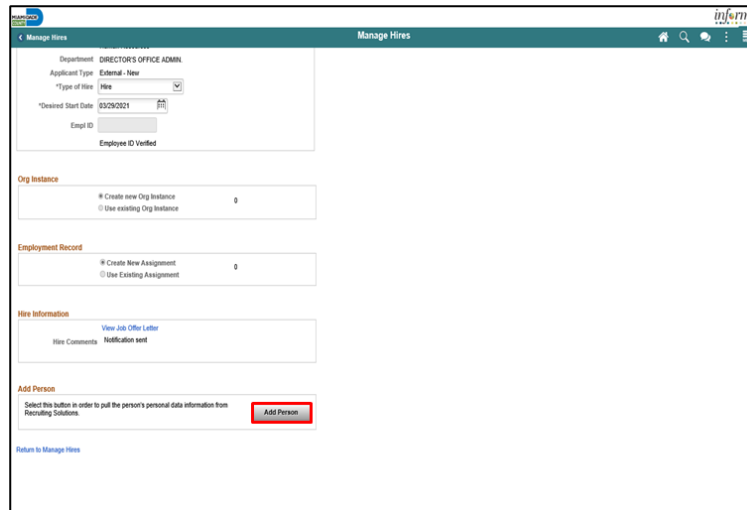
The screenshot shows the 'Manage Hires' page in the informatics system. The page title is 'Manage Hires'. Below the title, there is a message: 'The following Hire Transactions are ready to be processed. Select a Transaction by Name to start the process.' There are two dropdown menus: '*Select Transactions Where' set to 'Source' and '*Equals' set to 'Smart HR Transactions'. A red box highlights the 'Refresh' button. Below this is a table with columns: Select, Start Date, Status, Name, Person ID, Type of Hire, Source, and Submitted By. The table is currently empty. At the bottom, there are buttons for 'Select All', 'Deselect All', and 'Cancel Selected Transactions'.

2. Select the applicant Name.



The screenshot shows the 'Manage Hires' page with the 'Refresh' button disabled. The '*Select Transactions Where' dropdown is now set to 'Start Date'. The date range is set to 'From 11/28/2021 To 12/18/2021'. The 'Refresh' button is now enabled. The table below has one row highlighted in yellow with the following data: Select (checkbox), Start Date (12/08/2021), Status (Requested), Name (XXXXXXXXXX), Person ID (0079577), Type of Hire (Hire), Source (Recruiting Solutions), and Submitted By. The 'Refresh' button is now disabled. At the bottom, there are buttons for 'Select All', 'Deselect All', and 'Cancel Selected Transactions'.

3. Select the **Add Person** button.



The screenshot shows the 'Manage Hires' page with the 'Add Person' button highlighted. The page displays various fields for adding a person: Department (DIRECTOR'S OFFICE ADMIN), Applicant Type (External - New), Type of Hire (Hire), *Desired Start Date (03/29/2021), and Emp ID. There are also sections for 'Org Instance' (Create new Org Instance or Use existing Org Instance), 'Employment Record' (Create New Assignment or Use Existing Assignment), and 'Hire Information' (View Job Offer Letter, Hire Comments, Notification sent). At the bottom, there is a red box around the 'Add Person' button. A link 'Return to Manage Hires' is also visible.

4. Review and update the applicant details, if applicable.

Lesson 4: Onboarding Activities

Lecture 2: Manage Hire

4. Select the **OK** button.

The screenshot shows the 'Manage Hires' form with the following details:

- Ethnic Group:** Regulatory Region: USA, Ethnic Group: HSPA, Primary:
- History:** Effective Date: 12/08/2021, Date Enrolled to Medicare: [blank], Citizenship (Proof 1): [blank], Citizenship (Proof 2): [blank], Eligible to Work in U.S.:
- Veteran:** Military Status: Not indicated, Military Discharge Date: [blank]
- Smoker History:** Table with columns *Smoker and *As of.
- Buttons:** OK (highlighted), Cancel, Apply, Refresh.

Note: After selecting the **OK** button an **Employee ID** is assigned.

5. Select the **Add Job** button.

The screenshot shows the 'Manage Hires' form with the following details:

- Employee ID:** 00350096
- Org Instance:** Create new Org Instance: 0, Use existing Org Instance: [blank]
- Employment Record:** Create New Assignment: 0, Use Existing Assignment: [blank]
- Hire Information:** View Job Offer Letter, Hire Comments, Notification sent
- View / Edit Person:** Select the View/Edit Person hyperlink to view or manually updated Personal Information. View / Edit Person
- Add Job:** Select this button in order to pull the person's job information from Recruiting Solutions. You will also have the option to access Job from Personal Data. **Add Job** (highlighted)

6. Review the **Work Location** details, and select the applicable **Reason** for hire.

The screenshot shows the 'Work Location Details' form for employee Garth Brooks (Emp ID: 00350096). The 'Reason' dropdown menu is open, showing 'Hire' and 'Rehire' options. The 'Hire' option is highlighted with a red box.

Work Location Details:

- *Effective Date: 03/29/2021
- HR Status: Active
- Payroll Status: Active
- Position Number: 00021616
- Position: HR FINANCE SPECIALIST
- Position Entry Date: 03/29/2021
- Regulatory Region: USA
- Company: MDC
- Business Unit: HR
- Department: HR0201000
- Location: 111 NW 1ST ST
- Establishment ID: MDC
- Date Created: 03/29/2022
- Last Start Date: 03/29/2021

Lesson 4: Onboarding Activities

Lecture 2: Manage Hire

7. Input or search for the **Employee Type**.

The screenshot shows the 'Manage Hires' form in the 'Payroll' tab. The 'Payroll for North America' section is expanded, showing fields for Pay Group (MDC), General Employees, Employee Type (E), Exception Hourly, Holiday Schedule (MDCALL), MDC_ALL, Tax Location Code (MDC), and Main Date Tax Location. The 'Employee Type' field is highlighted with a red box. Below this is the 'Absence Management System' section with fields for Pay Group (MDC), General Employees, and an empty Setting field. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh', along with a breadcrumb trail: 'Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation'.

8. Select the **Salary Plan** tab.

The screenshot shows the 'Manage Hires' form in the 'Salary Plan' tab. The 'Salary Plan' tab is highlighted with a red box. The form displays employee information for Garth Brooks (Empl ID: 0035096, Empl Record: 0). The 'Payroll Information' section shows Effective Date (03/29/2021), Action (Hire), Reason (First Job), and Payroll Status (Active). Below this is the 'Payroll for North America' section with fields for Pay Group (MDC), General Employees, Employee Type (E), Exception Hourly, Holiday Schedule (MDCALL), MDC_ALL, Tax Location Code (MDC), and Main Date Tax Location. The 'Absence Management System' section has fields for Pay Group (MDC), General Employees, and an empty Setting field. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh', along with a breadcrumb trail: 'Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation'.

9. Input or search the **Step** details, if applicable.

Note: If the salary plan is an open grade, the **Step** field will not be applicable.

10. Select the **Compensation** tab.

The screenshot shows the 'Manage Hires' form in the 'Compensation' tab. The 'Compensation' tab is highlighted with a red box. The form displays employee information for Garth Brooks (Empl ID: 0035096, Empl Record: 0). The 'Salary Plan Details' section shows Effective Date (03/29/2021), Action (Hire), Reason (First Job), and Payroll Status (Active). Below this is the 'Salary Admin Plan' section with fields for STEP, Step, Grade (291), Step, Grade Entry Date (03/29/2021), Step Entry Date (03/29/2021), and a 'Step' field highlighted with a red box. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh', along with a breadcrumb trail: 'Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation'.

Lesson 4: Onboarding Activities

Lecture 2: Manage Hire

11. Select the **Default Pay Components** button.
12. Review and update the **Pay Components** section, if applicable.
13. Select the **Calculate Compensation** button.

Manage Hires Detail - Compensation

Employee: Athina Salgado, Empl ID: 0079577, Empl Record: 1

Compensation Details

Effective Date: 12/02/2021, Effective Sequence: 0, Action: Hire, Reason: First Job, Payroll Status: Active, Job Indicator: Secondary Job, Current:

Compensation Rate: 0.00 USD, Frequency: B, Biweekly

Default Pay Components

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDEKLY	0	25000	USD	B			

Calculate Compensation

14. Select the **Employment Data** link.

Manage Hires Detail - Compensation

Employee: Athina Salgado, Empl ID: 0079577, Empl Record: 1

Compensation Rate: 1,646.15 USD, Frequency: B, Biweekly

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 MDEKLY	0	1,576.100000	USD	B			
2 PMSMPAY	0	70.000000	USD	B			

Employment Data

15. Click the **Time Reporter Data** link.

Manage Hires Detail - Employment Information

Employee: Garth Brooks, Empl ID: 00350896, Empl Record: 0

Organizational Instance

Original Start Date: 03/29/2021, Termination Date: 03/29/2021, Org Instance Service Date: 03/29/2021

Organizational Assignment Data

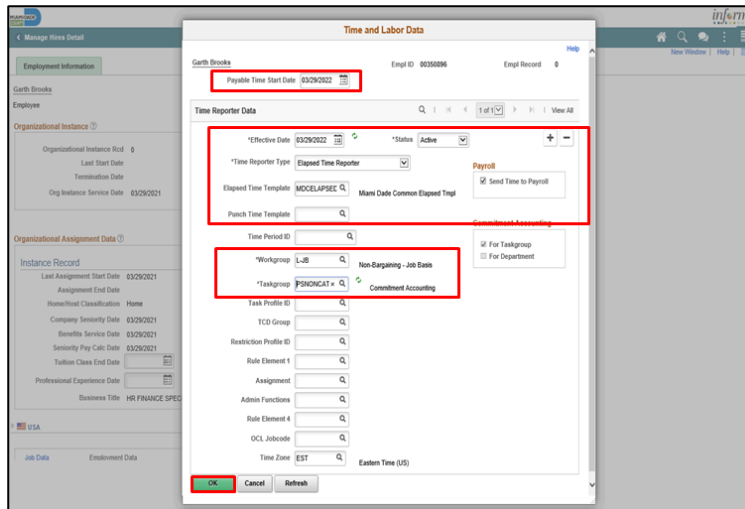
Last Assignment Start Date: 03/29/2021, First Assignment Start: 03/29/2021, Business Title: HR FINANCE SPECIALIST

Time Reporter Data

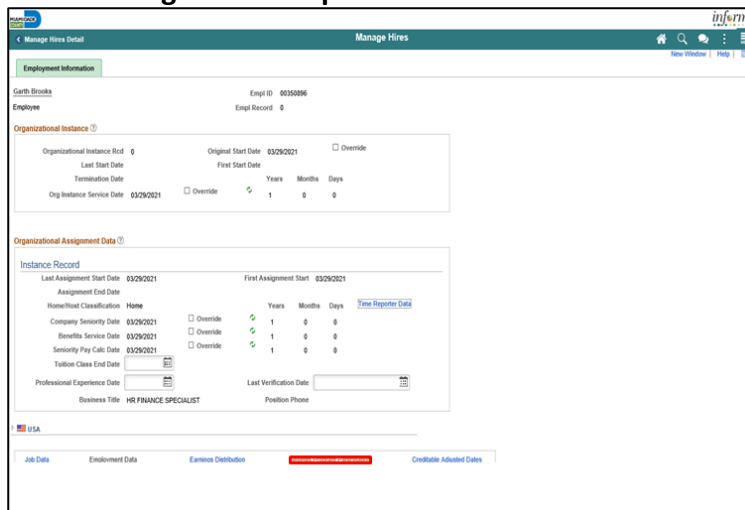
Lesson 4: Onboarding Activities

Lecture 2: Manage Hire

16. Input or search for the **Payable Time Start Date**.
17. Input or search for the **Effective Date**.
- Note:** The effective date must equal the date of hire.
18. Select the applicable **Time Reporter Type**.
19. Input or search for the **Elapsed Time Template**.
20. Input or search for the **Punch Time Template**, if applicable.
21. Input or search for the **Workgroup**.
22. Input or search for the **Taskgroup**.
23. Select the **OK** button.



24. Select the **Benefits Program Participation** link.



Lesson 4: Onboarding Activities

Lecture 2: Manage Hire

25. Input the Retirement Kind.

The screenshot shows the 'Manage Hires Detail' form. The 'Retirement Kind' field is highlighted with a red box and contains the value 'NA'. Other fields include 'Benefit Record Number', 'Effective Date', 'HR Status', 'Payroll Status', 'Benefit System', 'Benefit Administration', 'Benefit Employee Status', 'Benefit Program', and 'Benefit Program Participation Details'.

26. Select the OK button.

This screenshot is identical to the previous one, but the 'OK' button at the bottom left of the form is highlighted with a red box.

20. Select the OK button.

The screenshot shows the 'Compensation Details' form. A warning dialog box is displayed in the center, stating: 'Warning - Compensation Frequency has been updated. (1910,254) Compensation Frequency has been updated.' The 'OK' button in the dialog box is highlighted with a red box. The background form is dimmed.

Lesson 4: Onboarding Activities

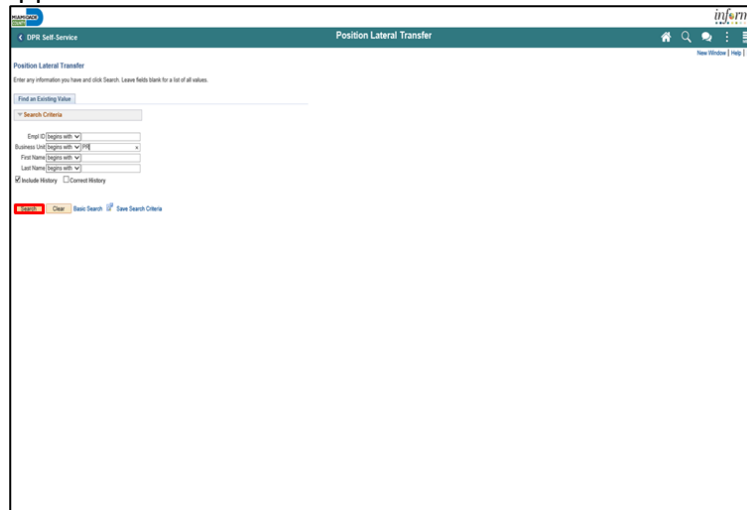
Lecture 3: Transfer an Employee to a New Position (Lateral)

Transfer Employee to a different Position Number (Lateral) – will allow a transfer of the employee within the same Department and Job Code to a different Position Number.

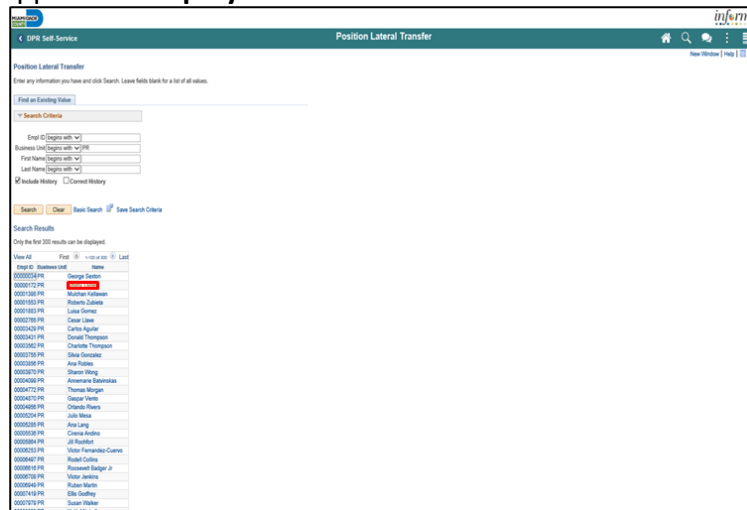
Note: This action is best used when transferring an employee from one branch location to another or to different time shifts.

Navigate to **Human Resources (HCM) > DPR Self-Service > Employee Position Lateral XFER**

1. Input any applicable Search criteria and select the **Search** button.



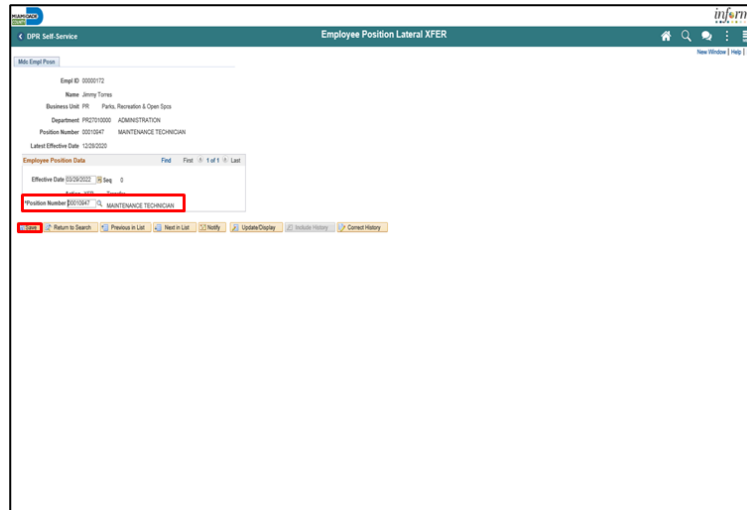
2. Select the applicable **Employee Name**.



Lesson 4: Onboarding Activities

Lecture 3: Transfer an Employee to a New Position (Lateral)

3. Input or search for the **Position Number** the employee is transferring to.
4. Select the **Save** button.



The screenshot shows the 'Employee Position Lateral XFER' form in the Informis system. The form is titled 'Employee Position Lateral XFER' and is part of the 'DPR Self-Service' interface. The form contains the following information:

- Emp# ID: 00000102
- Name: Jimmy Torres
- Business Unit: PR - Parks, Recreation & Open Space
- Department: PR0270000 - ADMINISTRATION
- Position Number: 0010447 - MAINTENANCE TECHNICIAN
- Lateral Effective Date: 12/31/2020

The 'Employee Position Data' section is highlighted with a red box and contains the following information:

- Effective Date: 12/31/2020, 08:00:00
- Position Number: 0010447, MAINTENANCE TECHNICIAN

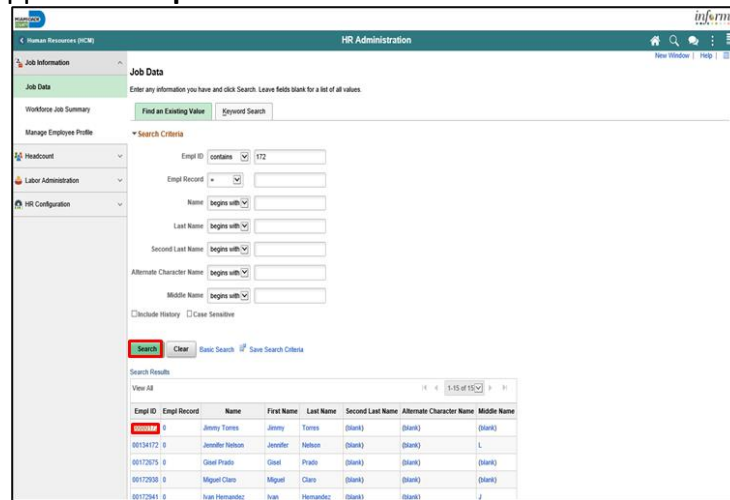
At the bottom of the form, there is a 'Save' button and a 'Return to Search' button. The 'Save' button is highlighted with a red box.

Lesson 4: Onboarding Activities

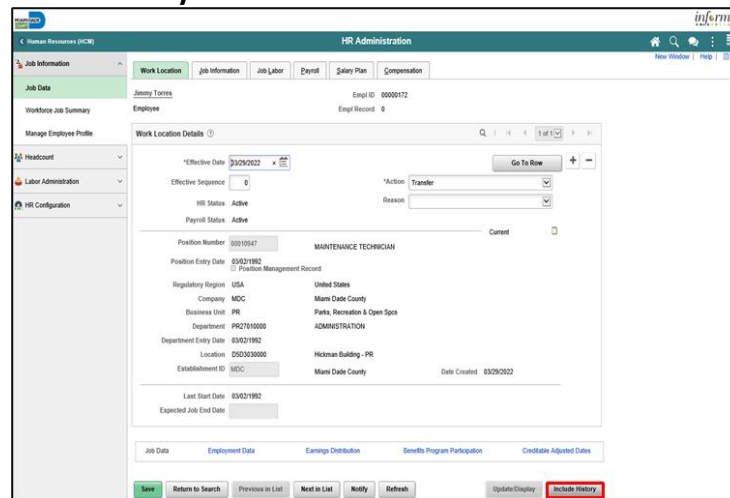
Lecture 4:
Verify the
Employee
Transfer

Navigate to **Human Resources (HCM) > HR Administration**

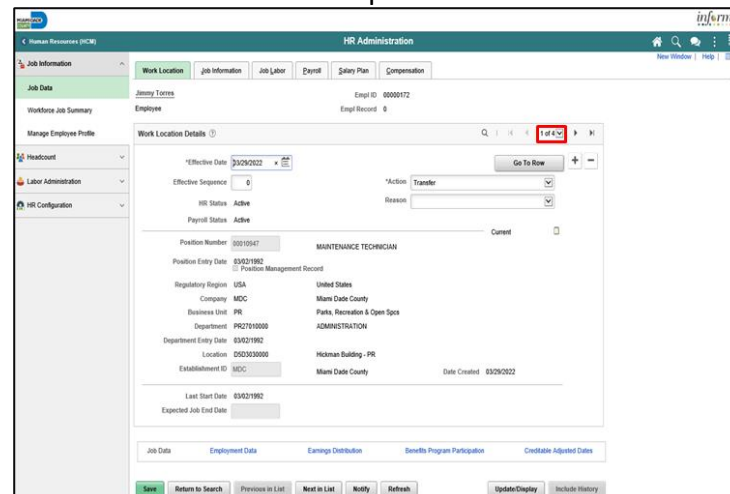
1. Input the applicable search criteria and select the **Search** button.
2. Select the applicable **Empl ID**.



3. Select the **Include History** button.



Note: An employee can have multiple history entries. They can be viewed by selecting the page on the **Work Location Details** drop down.



Lesson 4: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario A DPR completes onboarding activities for a newly hired employee.

Instructions This activity is will be performed individually; the user must complete it on the user classroom workstation using the INFORMS training environment. The Instructor will tell the user how to log into INFORMS.

The user will determine how to perform the activity by following the data sheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if the user have questions.

Lesson 4: Training Exercise

Debrief



1. What section contains the Work Location details?

2. What section contains Time Reporter details?

Lesson 4: Onboarding Activities

Lesson Summary

Now that the user have completed the lesson, the user should be able to:

- Manage a hire



Module 3: Course Summary

Objectives Achieved



Congratulations! The user have completed the Recruitment course. The user now should be able to:

- Create a Job Opening
- Screen Applicants for Minimum Qualifications and Preferences and Apply Points
- Employment Offer and Acceptance
- Prepare for Hire
- Manage Hire
- Transfer an Employee

Next Steps

Now that the course has been completed, please make sure to complete the following tasks:

- Course assessment (tests the user knowledge of the content)
- Course evaluation (collects course feedback)
- Log off the user workstation

Reference Materials

Reference Materials



If there are any questions about any of the topics presented in this course, use the following resources:

www.miamidade.gov/informs

User Productivity Kits (Available on the INFORMS Training Webpage):

- Create a Job Opening
- Screen Applicants for Minimum Qualifications and Preferences then Apply Results
- Create a Job Offer
- Update Candidate Status
- Prepare for Hire
- Manage a Hire

Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
Recruiting Location	The location in which the job will be performed. When jobs are posted, the recruiting location is visible to applicants.
Job Profile	The set of competencies and responsibilities that apply to workers in the same job, position, or salary grade.
Recruitment Contact	The HR Central Recruitment contact for the open job.
Recruitment Area	The location in which the interview will take place.
Recruiter	The department's representative and contact for the open job.
Relative Open Date	The date in which a job will be visible to applicants in relation to the approval date. The system calculates the posting date and displays it in the Post Date field, which becomes unavailable for entry.
Veteran's Preference Points	Veteran' Preference Points are awarded based on the documentation provided by the candidate to HR Central Recruitment.
Base Salary	The amount of money a salaried employee regularly earns before any additions or deductions are applied to their earnings
Candidate Status	The status of the candidate during the pre-employment process. The candidate status identifies the various steps of department specific pre-employment activities.
Employee Profile	The central location of an individual's attributes. The profile tracks employees' skills, competencies, and accomplishments. It can be utilized in career planning, for identifying training needs, for performance management and in the recruitment process for checking minimum job requirements.
Time Reporter Type	Determines the information of an employee must provide for work hours on the timesheet, Punched or Elapsed.
Time Reporting Template	Determines fields used for time entry. There is an Elapsed Time Reporting Template and a Punch Time Reporting Template.
Workgroup	Grouping of employees that share common Time and Labor attributes and rules.
Taskgroup	A taskgroup identifies the valid, default time reporting templates, task template, and task profile(s) for employee's with the same task reporting requirements. Each employee must be associated with one taskgroup.