University of Colorado
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EMPLOYEE SERVICES

Human Capital Management: Captivate Training Guide

Add Person and Hire that Person—Direct Hire

This guide describes the steps to follow while completing the Training and Assessment simulations for HCM. This guide mirrors the steps you will perform in the simulation.

Captivate Task:	Add a person and hire that person using Transaction Launch Page.
Before You Begin:	• Turn off pop-up blockers. • After typing in a field, press the down arrow ↓. Our simulations do not allow you to press Enter. Pressing the down arrow saves your data entry in a field and lets you continue with the simulation. • When instructed to scroll, click the scroll bar area. You cannot use the mouse wheel to move up and down simulated pages.

Taking the Training Simulation and Assessment

No.	Step	Values
1	From HCM Community Users dashboard, click **Transaction Launch Page**. This page is also available from Pay Actions and Non-Pay Actions.	
2	Enter **Last Name**.	Howell
3	Enter **First Name**.	Matthew
4	Click **Search**. Error displays: Search Option is Required.	
5	Click **OK**.	
6	From Search Option list, select **Hire/Rehire/Additional Job**.	
7	Click **Search**.	
8	Notice Display: **No ATS** and **No HCM matching values found**.	
9	Select **Add a Person**.	
10	Click **Submit**. Message displays: Is this a contract employee?	
11	Click **No**. The same page and tabs for Add/Modify a Person are displayed.	
12	In the Name section, select an **Effective Date**. This is the date this person becomes a record in the system. Default is today's date. Because dates can conflict, recommend choosing a date prior to today.	October 1, 2018

No.	Step	Values
13	Click **Add Name**.	
14	Enter **First Name** and **Last Name** and click **OK**.	Mathew Howell
15	Notice required fields. (Gender, Highest Ed, Marital Status, National ID)	
16	Enter **Date of Birth**.	January 1988, 10th
17	Select **Gender**.	Male
18	In the National ID section, type a **National ID** (Social Security Number). Best Practice: If you have the social security number, enter it. If not, leave blank (depending on campus).	515-05-5115
	Pause – Don't click any buttons yet.	
19	Select the **Contact Information** tab.	
20	Click **Add Address Detail**. Address History appears with today's date as the effective date for this address.	
21	Click **Add Address**.	
22	Type address info and click **OK**. Address History page appears. Notes: • HCM copies Home to Mailing (and vice versa) overnight. If these addresses are different (e.g. students), enter both. • State tax withholding is determined by mailing address.	123 Main St Denver, CO 80203
23	Click **OK**.	
24	Select **Phone Type**.	Cellular
25	Type phone number.	303-555-9999
26	Click **Preferred**.	
27	Select **Email Type**.	Home
28	Type email address.	mhowell@gmail.com
29	Click **Preferred**.	
	Pause – Don't click any buttons yet.	
30	Click **Regional** tab.	
31	Select **Ethnic Group**.	White
32	Select **Military Status**.	No Military Service
33	Click **CU Personal Data** tab. This is for Hire Right integration for E-Verify and background check.	Just looking
34	Click **CU Personal Data I9** tab. This is for Hire Right integration for Form I-9.	Just looking

No.	Step	Values
35	Click **OK**. The Enter Transaction Details page appears displaying system generated Empl ID. (Make a note of this ID to use when checking pending approval status.)	
36	Right-click **Related Actions** wedge and select **CU Person Organizational Summary**. The summary appears blank. This is one more way to confirm that this person does not exist already in HCM. Note: Related Content is also available from this page that lets you run queries and verify other related information.	
37	Close the summary window.	
38	Enter **Job Effective Date** (Hire Date). Note: Defaults to today's date. Cannot be the same as person effective date or position effective date.	November, 2018, 5th
39	From the Reason Code list, select **New Hire**.	
40	Click **Continue**. The Enter Transaction Information page appears prompting for position information.	
41	Click the **Position Number** lookup and select the position. Default information from Position populates data fields. Notice: • Officer code defaults to None. (Editable) • Pay Group defaults based on most common pay groups by job code. (Editable)	00001016
42	Select **Employee Type**.	S (Salaried)
43	Select **Compensation Frequency**.	M (Monthly)
44	Select **Comp Rate Code**.	BASEM
45	Type a **Compensation Rate**.	5000.01
46	Notice ability to add multiple pay components. Must have one (up to three). If needed, you would also be able to enter an Appointment End Date for reporting purposes.	
47	In Comments section, type **Job Notes**. On approval, these comments populate Job Notes in Job Data.	Direct hire for IT manager
48	Click **Add Attachment**.	
49	In **Attachment Title** field, type a name for this document.	Cover letter
50	Click **Add** (paperclip).	
51	Click **Choose File**.	

No.	Step	Values
52	Select a file and click **Open**.	
53	Click **Upload**. File information displays.	
54	Notice ability to Save as Draft.	
55	Click **Save and Submit for Approval**. Notice TBT Request ID.	
56	Click **OK** from Message box. Message displays: Further Processing Required.	
57	Click **OK**. System returns to Enter Transaction Details page. You should now check pending approvals through either Transaction Status or the Transaction Query.	
58	Click **Related Content**.	
59	Select **Transaction Status**.	
60	Click **New Window**.	
61	Update the effective date range.	**From:** November 1 **To:** November 30
62	Click **Refresh**. Mathew Howell's record appears with an Action Required status.	
63	Right-click the **Related Actions** wedge, and click **View Approval Chain**. The TBT Transaction Approval Status appears showing multiple pending approvers.	
64	Close the approval status window.	
Done.		

Next Steps: Refer to *Hiring an Employee Step-by-Step Guide* for more details about hiring, rehiring, and adding additional jobs, including contract hires. For just the basic steps, refer to *Hiring a New Employee (Direct Hire) Streamline Guide*.