Appoint, Change and Terminate (ACT) Documentation
Using the ACT Find Window – Part One: Field Facts and Button Definitions

From the FIND WINDOW the user can perform the following tasks:

- Locate employee information.
- Locate, view and retrieve your documents as a Requestor.
- Locate and view ACT documents created by other Requestors who have the same level of responsibility.
- Locate and retrieve a specific ACT document.

UAB HR Officer → HR Transactions → ACT → Find Window

Find Window Field Facts

The DOCUMENT NUMBER field is used to locate a document that exists for an employee. Only one active document per active assignment can exist on an employee at one time. A document may be in OPEN, READY, USER APPROVED, CENTRAL APPROVED, COMPLETED, or CANCELED status. For a description of each document status, click here. A Requestor must know the document number in order to locate a specific document.

The REQUESTOR field is used to locate documents created by a specified requestor. The requestor name must be entered in the last name, first name format. If the Requestor is not found, use the LOV to locate the person. Use the percent (%) wildcard to narrow the search, and be as specific as possible. The LOV is not case sensitive. When the Requestor is selected or entered, the person’s BlazerID will display in the field.

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**Full Name**
The **FULL NAME** field can be used to view employee information, locate a document for the employee, or create a new document for the specified employee. The Full Name must be entered in the **last name, first name** format. If the employee is not found, use the LOV to locate the person. If you type in a percent sign (%) in the **FULL NAME** field you will be able to view all of the UAB employees in your organization. Use the percent (%) wildcard to narrow the search, and be as specific as possible. The full name LOV is not case sensitive.

**Identification Number**
The **IDENTIFICATION NUMBER** field can be used to view employee information. All UAB employees will be assigned an identification number once their initial hire document is processed through Central Administration. The **IDENTIFICATION NUMBER** field will not have an LOV. To locate an employee by their identification number, a Requestor must know the employee’s number.

**SSN**
The **SSN (SOCIAL SECURITY NUMBER)** field can be used to view employee information. To locate an employee by their SSN, a Requestor must know the employee’s number. The **SSN** field will not have an LOV. The Administrative Systems database will not acknowledge the employee’s SSN number until their initial hire document is in a “Complete” Status.

**Employee Blazer Id**
The **EMPLOYEE BLAZER ID** field can be used to view employee information. To locate an employee by their Employee Blazer, a Requestor must know the employee’s Blazer Id. The **EMPLOYEE BLAZER ID** field will not have an LOV.

**Assignment Number**
The **ASSIGNMENT NUMBER** field is a display field only. Some employees may have multiple assignments. To view information/documents or create a document for an employee with multiple assignments, a Requestor must make sure they choose the correct employee’s assignment.

**Effective Date**
The **EFFECTIVE DATE** field is a future-use field. After a history has been started on an employee, you will be able to view a snapshot of the employee at a specified time in history.

**Example:** The year is 2006. You want to see what Tia Rodriquez was doing 21-Dec-2004 and what her salary was at the time. You would enter her name, SSN, or Employee ID (any one of the three). You would enter 21-DEC-2004 in the Effective Date field, and click **DATA INQUIRY** button to view her information as of that date. The starting history effective dates will be 21-Sep-03 for biweekly paid employees and 01-OCT-2003 for monthly paid employees.
Find Window Button Definitions

**Clear**

The **Clear** button is used to quickly clear all the **Find Window** fields. Information entered in the **Find Window** must be cleared before trying to locate another document or employee.

**Data Inquiry**

The **Data Inquiry** button when used will display only data for the specified employee and assignment. Once an employee has been located, the system will look for multiple assignments. If multiple assignments exist, an LOV of assignments for that employee will display. If only one assignment exists, the **Data Inquiry** forms will be populated. No document information is shown on the **Data Inquiry** form and if an employee has a document in process, the information will not be updated on the **Data Inquiry** forms until the document status reaches a “**COMPLETE**” status.

**Retrieve a Document**

The **Retrieve a Document** button is used to access a particular document on an employee. The Retrieve Document form is used for adding or editing current information on a document that is in **OPEN** status; canceling a document that has not be submitted but has been saved; reviewing a document that is in the approval process; and or reviewing documents that are in “**COMPLETE**” status.

**Create New Document**

The **Create New Document** button is used to create a document for an existing employee or for a new employee, volunteer, or trainee award. Once a new document has been saved a document number is created. Once the document number has been created, a Requestor can use the **Retrieve a Document** button to edit the information before it is submitted.
The **FIND WINDOW** allows a Requestor to locate a specific employee within an Organization by using one of four values:

- by % Wildcard function
- by Full Name
- by Identification Number
- by Social Security Number

### Locating Employees using % Wildcard

1. On the **ACT FIND WINDOW**; click in the **FULL NAME** field.

2. Type in the **UAB employee’s Last Name** followed by the percent (%) wildcard.

3. Press the **TAB** key.

4. An LOV listing all the employees by the specified last name will appear.
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**Note:** You may see duplicate names for some employees. Employees who have more than one assignment will have the same identification number, but the second assignment will have the identification number followed by a dash and 2.

Before creating or retrieving a document on an employee with multiple assignments, make sure you choose the correct one from the list. Also be aware of the assignment effective start date.

5. Highlight the employee you wish to view, and click on the OK button (or double click on the name). You may have to use the scroll bar to locate the employee.

6. The **FULL NAME**, **IDENTIFICATION NUMBER**, and **ASSIGNMENT NUMBER** fields should be populated.
7. Click the **DATA INQUIRY** button to view the employee’s personal information. For instructions on viewing the **DATA INQUIRY FORM**, click here. Click the **RETRIEVE A DOCUMENT** button to view completed documents or edit an open document. For instructions on **RETRIEVING A DOCUMENT**, click here. Click **CREATE NEW DOCUMENT** to create a new document for an employee.

8. Click on the **FLASHLIGHT** in the toolbar to return to the **FIND WINDOW**.

9. Before performing another search from the **FIND WINDOW**, click the **CLEAR** button. This will ensure that the previous employee’s information is cleared from the search.

**Locating Employees by Full Name**

1. Clear the **FIND WINDOW**.

2. Enter the correct name of an employee in the **FULL NAME** field using the last name, first name format.

3. Press the **TAB** key.

4. The **FULL NAME, IDENTIFICATION NUMBER**, and **ASSIGNMENT NUMBER** fields should be populated.
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5. Click on DATA INQUIRY, RETRIEVE A DOCUMENT, or CREATE NEW DOCUMENT for this employee.

Quick Tip: You can “speed up” this process. After entering the employee’s correct name click on any one of the three form buttons – DATA INQUIRY, RETRIEVE A DOCUMENT, OR CREATE NEW DOCUMENT. You will be taken directly to the employee’s information.

Locating Employees by Identification Number

UAB DOES NOT UTILIZE AN EMPLOYEE’S SOCIAL SECURITY NUMBER AS EMPLOYEE IDENTIFIERS. INSTEAD UAB EMPLOYEES WILL BE ASSIGNED A SEVEN-DIGIT IDENTIFICATION NUMBER AFTER THEIR INITIAL HIRE DOCUMENT HAS ENTERED COMPLETE STATUS.

1. Clear the FIND WINDOW.
2. Enter the Employee’s Identification Number.

3. Press the TAB key.
4. The FULL NAME, IDENTIFICATION NUMBER, and ASSIGNMENT NUMBER fields should be populated.
5. Click on DATA INQUIRY, RETRIEVE A DOCUMENT, or CREATE NEW DOCUMENT for this employee.

Quick Tip: You can “speed up” this process. After entering the employee’s correct name click on any one of the three form buttons – DATA INQUIRY, RETRIEVE A DOCUMENT, OR CREATE NEW DOCUMENT. You will be taken directly to the employee’s information.
Locating Employees by Social Security Number

1. Clear the FIND WINDOW.

2. Enter the Employee’s Social Security Number without the dashes. Enter only nine numbers. If you forget and enter the dashes, you will get an error message. Click OK to clear the error message and retype with the dashes.

3. Press the TAB key.

4. The FULL NAME, IDENTIFICATION NUMBER, and ASSIGNMENT NUMBER fields should be populated.

5. Click on DATA INQUIRY, RETRIEVE A DOCUMENT, or CREATE NEW DOCUMENT for this employee.

   **Quick Tip:** You can “speed up” this process. After entering the employee’s correct name click on any one of the three form buttons – DATA INQUIRY, RETRIEVE A DOCUMENT, or CREATE NEW DOCUMENT. You will be taken directly to the employee’s information.
The **FIND WINDOW** allows the Requestor to **locate, view** and **retrieve** documents created for a specific employee. These documents may be in any status: OPEN, READY, USER-APPROVED, CENTRAL APPROVAL, COMPLETED OR CANCELED. Only the documents that are still in OPEN status may be edited. Once a document is submitted for approval, is canceled, or reaches a completed status, it becomes a view only document for the Requestor.

Documents can be located and retrieved using one of the following methods:
- Entering your name in the **REQUESTOR** field.
- Entering another Requestor’s name within your organization in the **REQUESTOR** field.
- Document Number.
- A Future-Dated Document

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**Locating and Retrieving Your Documents by Requestor**

1. Clear the **FIND WINDOW**.

2. Click inside the **REQUESTOR** field and type your **LAST NAME, FIRST NAME**.

3. Click on **RETRIEVE A DOCUMENT** to view your list of documents.

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![FIND WINDOW](image-url)
4. Locate the document you want to view; click **OK**.

5. The document will open for viewing/editing. **Remember you can edit only documents in “Open” status.**
Locating and Retrieving another Requestor's Documents:

ACT allows for Requestors within the same responsibility to retrieve another Requestor's document for processing and approval.

1. Clear the **FIND WINDOW**.
2. Click inside the **REQUESTOR** field.
3. Type the Requestor's **last name, first name**.
4. Press the **TAB** key. If the Requestor is found, his or her BlazerID will appear in the field.
5. If the Requestor is not found, the **REQUESTOR LOV** will open with a list of all of Requestors in your organization.
6. Enter the **last name of the requestor and the percent symbol (%)** to view a filtered list of Requestors. Once you have located the appropriate Requestor, click **OK**.

7. Click on the **RETRIEVE A DOCUMENT** button to view a list of the Requestor’s documents.

8. Select the document you want to view or edit; click **OK**. **Remember you can edit only documents in an “Open” status**.

9. The **FIND WINDOW** displays the **DOCUMENT NUMBER** and the **REQUESTOR’S BLAZER ID**.

10. Click the **RETRIEVE A DOCUMENT** button in order to view the document.

In order to edit a document created by another Requestor, you will have to **Take the Document**. For instructions on: **“Taking a Document”** [click here](#).
Locating and Retrieving Documents by Document Number

It is recommended that you keep a list of your documents in order to quickly locate a document by the document number.

When creating a document for a new employee (volunteer, trainee or new hire), it is strongly recommended you record the document number. Until the New Hire Document reaches a “Complete” status, your information can only be retrieved by document number or Requestor. The Administrative Systems can not locate new employees by name or social security number until the New Hire Document reaches a “Complete” status.

1. Clear the **FIND WINDOW**.

2. Enter the **document number** in the **DOCUMENT NUMBER** field.

3. Click on the **RETRIEVE A DOCUMENT** button. The document will appear in the **ACT MAIN FORM**. If the document is still in **OPEN** status, you will be able to edit the information. If it is in any other status, the document will be view only.
Locating and Retrieving Future Dated Documents

If you wish to view a future-dated document, perform the following steps:

1. In the **FIND WINDOW**, use one of the methods described above to locate the employee. For example, click in the **FULL NAME** field, type in *the last name of the employee followed by the %*. Press the **TAB** key.

2. In the **EFFECTIVE DATE** field, enter *the date of the future dated document*. For example: **01-DEC-2005**.

3. Click on **RETRIEVE A DOCUMENT**.

4. A list will appear of documents that have been prepared for this employee. Double-click on the future-dated document to view the document.