

URGEMS Employee Lookup QRC

The URGEMS application allows Sr. / Dept. Administrators to quickly add employee information by pulling employee data from the University's Lightweight Directory Access Protocol (LDAP) system. This promotes consistency and efficiencies when adding employees. This Quick Reference Card (QRC) has been created to outline these steps.

Employee Lookup

1. Within the *Update Employee* screen (Salary>Employee>Details Tab) is the **Select from LDAP** link option which will add employee information to the Update Employee fields. Select this link
2. Within the LDAP Lookup screen search for an employee by name, or ID from the LDAP system. Narrow your search by using one of the radio buttons; Faculty/Staff, Student.
3. Select the appropriate user from the search results
4. Choose the **Assign** button to place the employee's information within the Update Employee Screen

Home Non-Salary Salary

Employees

Search Browse Details

Update Employee

Status:

Record Status: Valid

SAVE Add New Delete Cancel

Select from LDAP

First Name:* CATHERINE

Employee ID: 164487

UR GEMS - LDAP Lookup - Internet Explorer

LDAP Lookup

Status:

Faculty/Staff Student Test Users

Search Criteria: All in at least one field.

Last Name: fronterre

Full Name:

Employee ID:

Search Clear

	NetID	First Name	MI	Last Name	Title	Employee ID	Unique ID	Email
Select	cfronter	CINDY	A	FRONTERRE	CHANGE MANAGEMENT & TRAINING COORDINATOR	244375	28928072	cfronterre@ur.rochester.e

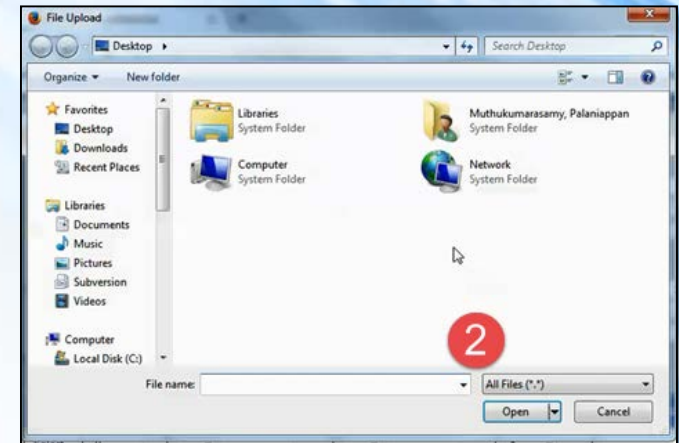
Close Assign



URGEMS Rapid Entry Form Upload

The URGEMS application can upload Request for Payment (F4) and Employee Expense Report (F3) forms for rapid entry of the corresponding financial transactions. Follow the steps outlined below on how to use this feature. This Quick Reference Card (QRC) has been created to outline these steps.

1. Navigate to the *Encumbrance/Expense* screen, Rapid Entry tab (Non-Salary>Encumbrance> Rapid Entry Tab) and select the **Upload Form** button
2. Within the *File Upload* window, type in or browse to the **Request for Payment RFP (F4)**, or **Employee Expense Report form (Excel version only)** within the file management system. Once the file is located, select the **Open** button. This will add the Spend Categories, FAOs and amounts to the Encumbrance/Expense Rapid Entry screen. Percentages will automatically be calculated within URGEMS
3. Review the data imported and make any necessary additions/changes to the Encumbrance/Expense Rapid Entry screen such as **FAO Year**.
4. When done, select the **Save** button in the upper left corner of the Encumbrance/Expense Rapid Entry screen to save the entry.



Show 100 entries

Showing 1 to 15 of 15 entries

3

	FAO Yr	Category	FAO	FAO Stat	Dept Attr	Percent	CS	Cost Share Acct	Amount
Select		SC 49650	OP 211138	A		67	<input type="checkbox"/>		100.00
Select		SC 49450	OP 211138	A		33	<input type="checkbox"/>		50.00

Note: This upload process only works with Microsoft Excel form versions