



# EMPLOYEE SELF-SERVICE USER TRAINING DOCUMENTATION FOR ORACLE FUSION

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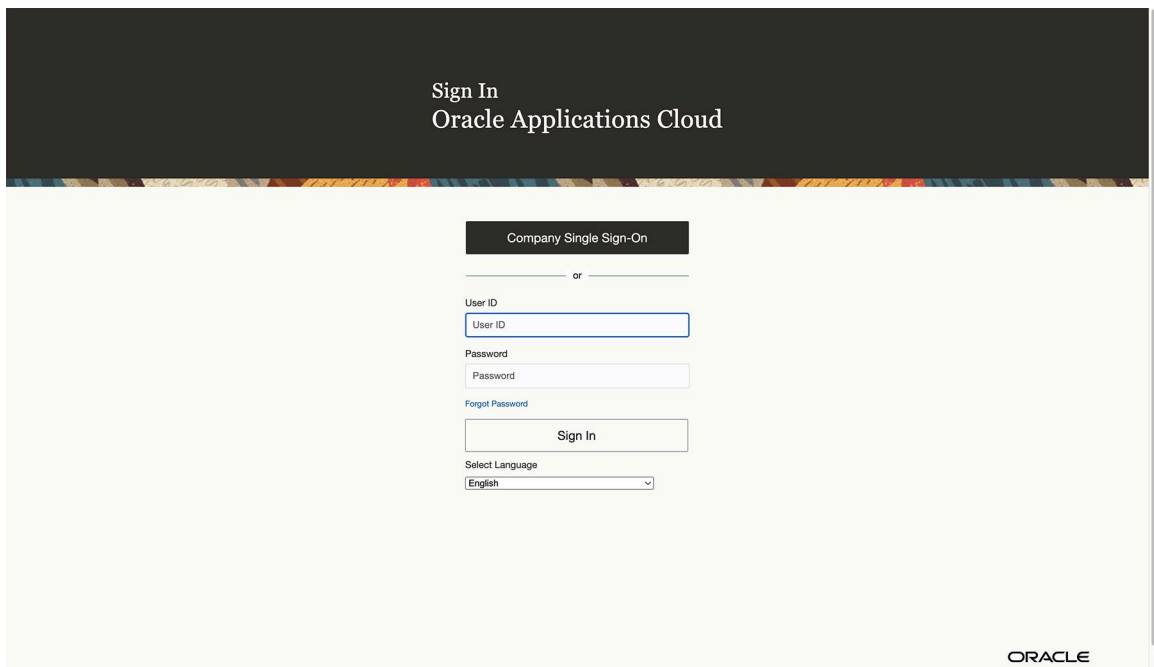
REVISED 12/04/2023

# Employee Self-Service User Training

## LOGGING INTO ORACLE FUSION

NOTE: CHROME AND FIREFOX ARE THE PREFERRED BROWSERS FOR ORACLE

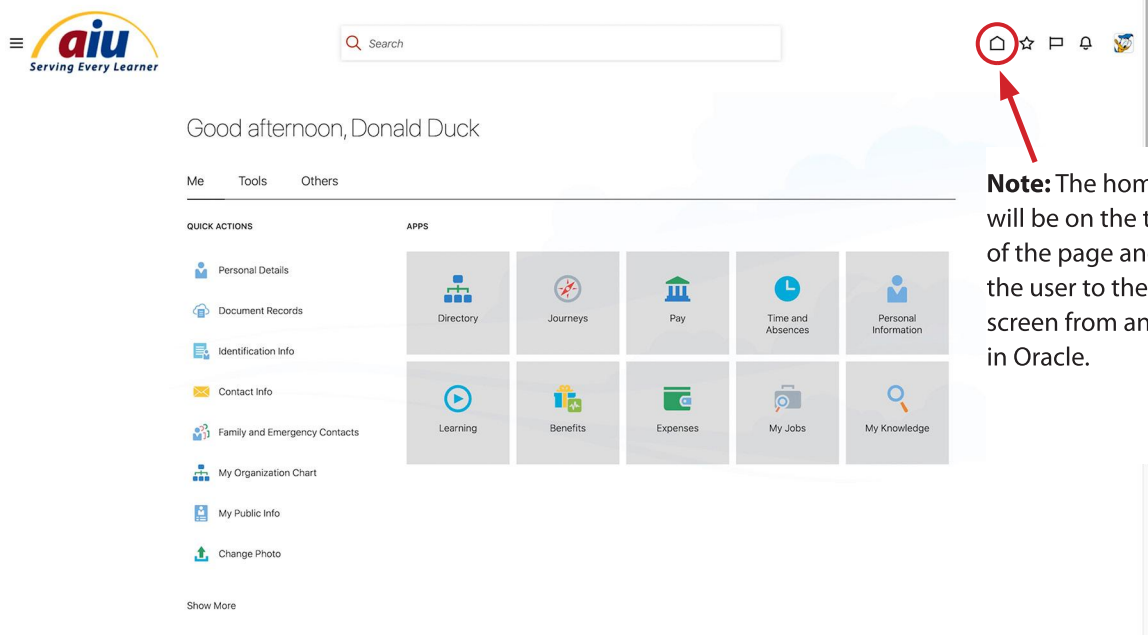
Sign in to Oracle – [Click here](#) to launch the Oracle login page.



The image shows the Oracle Applications Cloud Sign In page. At the top, it says "Sign In Oracle Applications Cloud". Below this is a "Company Single Sign-On" section. There are two input fields: "User ID" and "Password". Below the password field is a link for "Forgot Password". A "Sign In" button is located below the password field. At the bottom, there is a "Select Language" dropdown menu with "English" selected. The Oracle logo is in the bottom right corner.

## Oracle Fusion Homepage Navigation

Upon logging into the Oracle application, the user will start on the HOME or Navigation page. One of your views on the Home Page has a springboard based on the mobile response news-feed theme. The springboard provides icons that you can use to open work areas.



The image shows the Oracle Fusion Homepage. At the top left is the Aiu logo with the tagline "Serving Every Learner". To the right is a search bar. Below the search bar is a greeting: "Good afternoon, Donald Duck". There are tabs for "Me", "Tools", and "Others". Below the tabs is a "QUICK ACTIONS" section with a list of links: "Personal Details", "Document Records", "Identification Info", "Contact Info", "Family and Emergency Contacts", "My Organization Chart", "My Public Info", and "Change Photo". To the right of the quick actions is a "SPRINGBOARD" section with a grid of icons: "Directory", "Journeys", "Pay", "Time and Absences", "Personal Information", "Learning", "Benefits", "Expenses", "My Jobs", and "My Knowledge". In the top right corner, there is a navigation bar with icons for home, favorites, notifications, and a user profile icon. A red circle and arrow point to the home icon.

**Note:** The home button will be on the top right of the page and will take the user to the Navigator screen from anywhere in Oracle.

## Add or Change Address

### Step 1

Navigate to the Personal Information page.

Click the 'Personal Information' Icon.

Good afternoon, Donald Duck

Me Tools Others

#### QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info

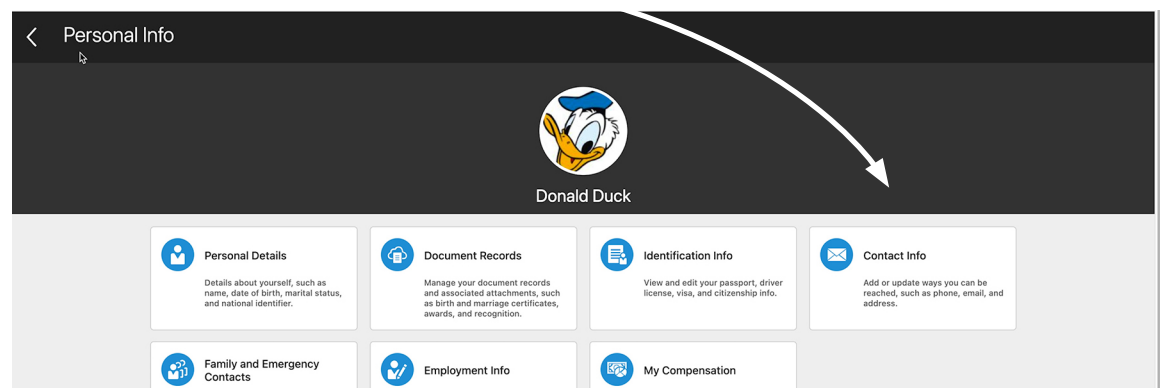
#### APPS

- Directory
- Journeys
- Pay
- Time and Absences
- Personal Information

### Step 2

Edit My Details

Click on 'Contact Info'.



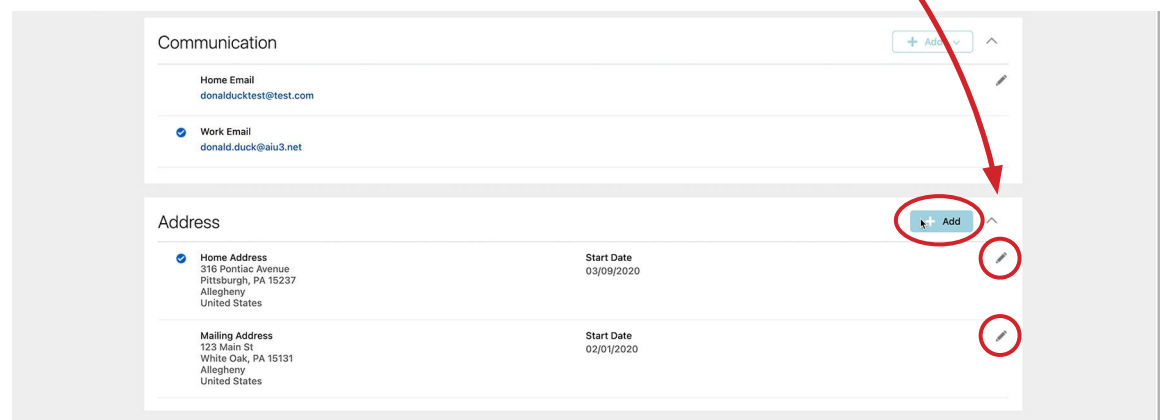
### Step 3

Edit or Add Address

Click on the pencil icon to edit or click '+' to add.

**Editing option** should be used if you would like to update an already **existing address**.

**Adding option** should be used if you would like to create a **new address** (when none previously existed)



## Step 4

### Updating or Adding New Address

Add the following information if you are updating your EXISTING address.

- **When does this address change start –**  
This should be the date you occupied the residence, but not before your hire date.
- **Address Line 1 and Line 2 –** Enter your street number and name
- **Zip Code –** Enter your zip code and choose your city, state, and county from the pop up window.

*When you choose from the pick list, the city, state and county will automatically populate in those fields.*

#### Address

Country

United States

Type

Home Address

\*When does this address change start?

11/15/2023

Enter 05/16/2023 if you're correcting a mistake in this address.

\*Address Line 1

444 Flower Street

Delete

Submit

Cancel

Address Line 2

\*ZIP Code

15239

\*City

Pittsburgh

\*State

PA

\*County

Allegheny

**Note:** City, State and County fields will autofill after you enter your zip code and choose from the pick list.

Add the following information if you are adding a NEW address.

- **Type –** Choose your address type. You are required to have a primary address, which can be home or mailing address.

*If you already have an existing address type, please use the edit (pencil icon); do not add (+) a new address for an already existing address type.*

- **Effective Start Date –** This should be the date you occupied the residence, but not before your hire date.
- **Address Line 1 and Line 2 –** Enter your street number and name
- **Zip Code –** Enter your zip code and choose the correct city, state, and county from the pop up window.

*When you choose from the list, the city, state and county will automatically populate in those fields.*

## Step 5

### Submit Address

Click **'Submit'** to save the address.

Submit

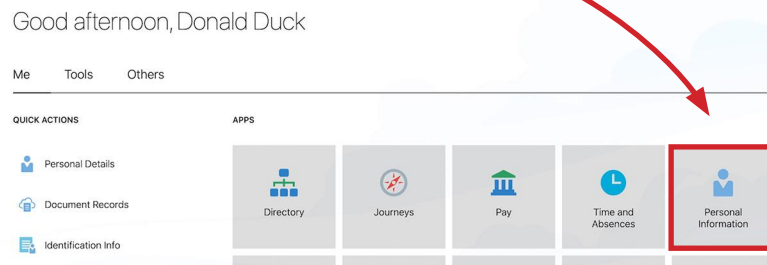
You will receive a notification that your change has been made and will be sent to the human resources department for approval.

# Add or Change Phone Number

## Step 1

Navigate to the **Personal Information** page.

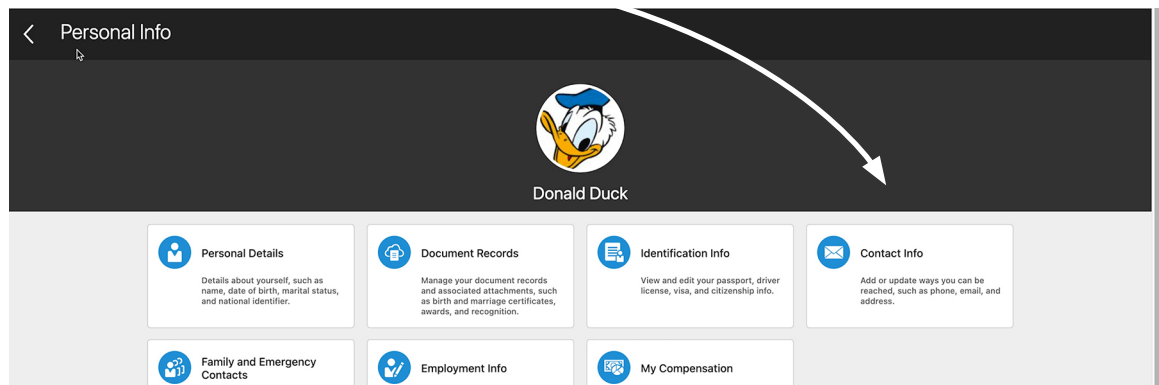
Click the '**Personal Information**' Icon.



## Step 2

**Edit My Details**

Click on '**Contact Info**'.



## Step 3

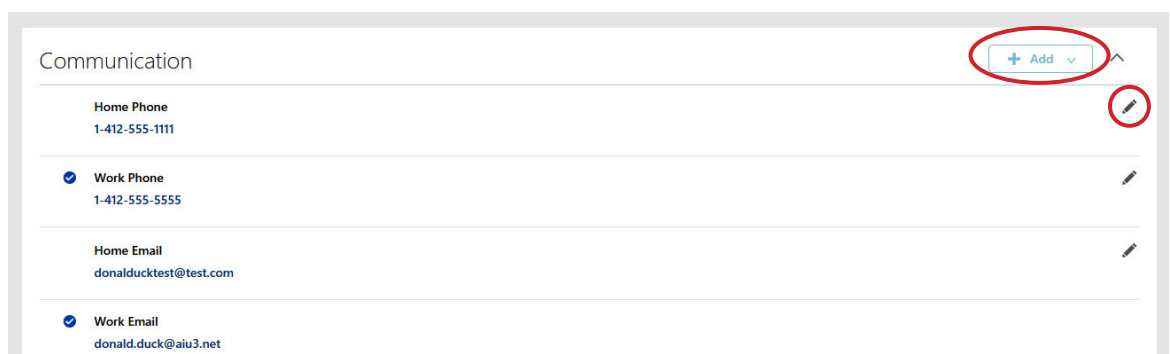
**Update or Adding a Phone Number**

Click on the **pencil icon** to edit or click '**+ Add**' to add.

**Editing option** should be used if you would like to update an already **existing phone number**.

**Adding option** should be used if you would like to create a **new phone number**

(when none previously existed)



## Step 3

continued

Update the information that needs to be updated..

Communication

Country

United States 1

\*Type

Home Phone

Area Code

412

\*Number

555-1111

Extension

\*From Date

01/01/2023

To Date

mm/dd/yyyy

☐

Primary

Delete

Submit

Cancel

Note: Check the primary box only for a work number, as the primary numbers will populate in the Directory.

Communication

+ Add

Home Phone

Add the following information if you are adding a NEW phone number.

- **Type** - choose your phone type. You are required to have your work phone number as your primary phone number. If you already have an existing phone type, please use the edit (pencil icon); do not add (+) a new address for an already existing phone type.
- **Area Code**
- **Number**
- **From Date** – enter the effective date of the phone number.
- **Note** that you can only have one of the same Type. *Your primary phone number should be your company issued work or mobile phone number. The primary phone will be accessible in the Directory.*

## Step 4

### Submit

Click 'Submit'.

Communication

Home Phone

412-555-1234

Country

Select a value

Area Code

412

\*Type

Second Home Phone

\*Number

394-

Select a value

Second Home Phone

Home Fax

Home Mobile Phone

Home Phone

Other

Pager

Second Home Phone

Second Work Phone

Submit

Cancel

Note: You will receive a notification that your change has been made and will be sent to the human resources department for approval.

## Add or Change Email

### Step 1

**Navigate to the Personal Information page.**

Click the '**Personal Information**' Icon.

Good afternoon, Donald Duck

Me Tools Others

#### QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info

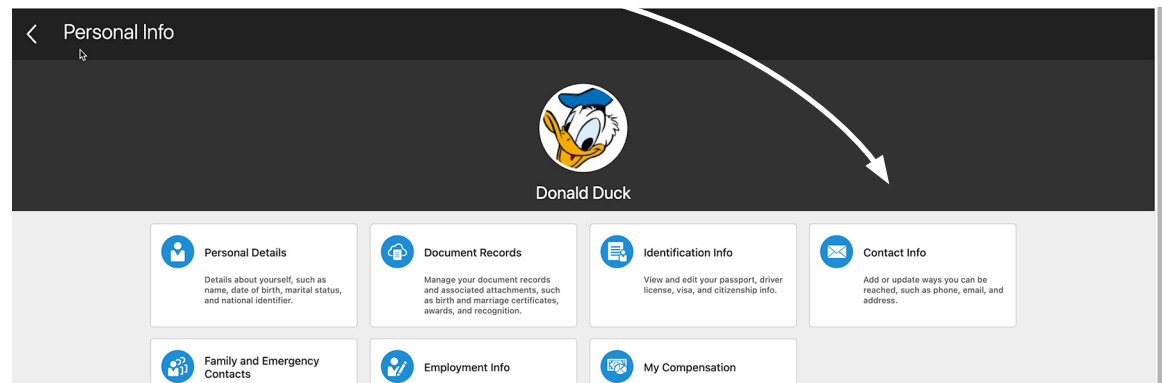
#### APPS

- Directory
- Journeys
- Pay
- Time and Absences
- Personal Information

### Step 2

**Edit My Details**

Click on '**Contact Info**'.



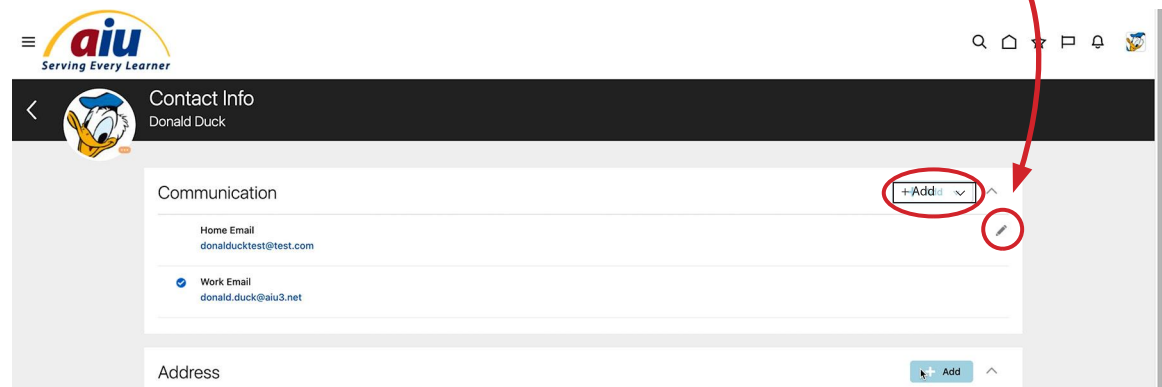
### Step 3

**Update or Adding an Email Address**

Click on the **pencil icon** to edit or **click '+ Add'** to add.

**Editing option** should be used if you would like to update an already **existing email address**.

**Adding option** should be used if you would like to create a **new email address** (when none previously existed)



## Step 3

continued

Update the information that needs to be updated.

The screenshot shows the 'Communication' form. It has two sections: 'Work Phone' with a checked checkbox and the number '412-394-', and 'Work Email' with a checked checkbox and the email '@aiu3.net'. Below these is a '\*Type' dropdown menu with options: 'Home Email', 'Select a value', 'Home Email', 'Work Email', and 'Comments'. To the right of the dropdown is a '\*Email' input field and a 'Primary' checkbox. At the bottom right are 'Delete', 'Submit', and 'Cancel' buttons. A red box highlights the 'Primary' checkbox with the text: **Note:** The primary box is only checked for a work email, as the primary email will autofill in the Directory.

### To add an Email Address

Click on the '+ Add' then 'Email Details'.

The screenshot shows the 'Communication' form with the '+ Add' button circled in red. A dropdown menu is open, showing options: 'Phone Details', 'Email Details', and 'Other Communication Accounts'. A red label 'Dropdown menu' points to the dropdown. The form also shows 'Home Phone', 'Work Phone' (checked), and 'Work Email' (checked) with the email '@aiu3.net'.

Add the following items:

- **Type** – Choose your email address type. You are required to have your work email as your primary email address. If you already have an existing email address type, please use the edit (pencil icon); do not add (+) a new email for an already existing email address type.

#### Email

- Note that you can only have one of the same 'Type'. Your work email should be identified as your primary email address. ***We encourage employees to record a personal email address to facilitate post-employment communication.***

## Step 4

### Submit

Click 'Submit'.

The screenshot shows three buttons: 'Delete', 'Submit', and 'Cancel'.

You will receive a notification that your change has been made and will be sent to the human resources department for approval.



## Add or Change Contact

### Step 1

Navigate to the **Personal Information** page.

Click the '**Personal Information**' icon.

Good afternoon, Donald Duck

Me Tools Others

#### QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info

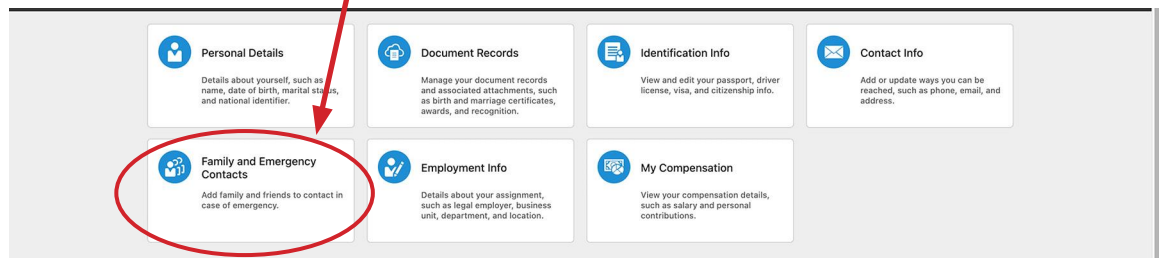
#### APPS

- Directory
- Journeys
- Pay
- Time and Absences
- Personal Information

### Step 2

**View Contacts**

Click on '**Family and Emergency Contacts**'.



### Step 3

**View your emergency contacts\***



### Step 4

**Edit or Add a Contact**

To edit a contact, click on the name.

The name is a link to the contact record, which opens and can then be edited.

To add a new contact, click on the +Add button.

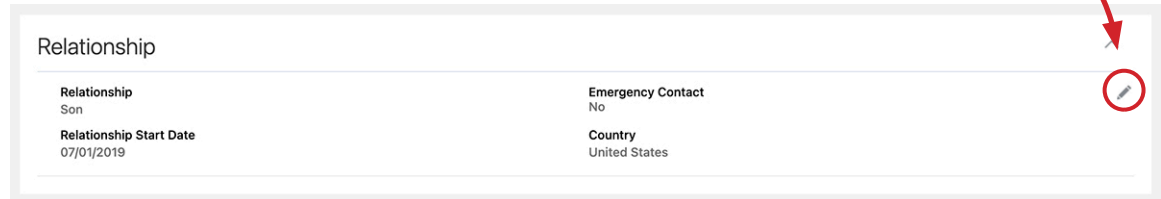
**\*Note: Family and Emergency Contacts is used to enter emergency contacts.** This section should not be used to enter dependents or beneficiaries for your benefits or life insurance. That information is entered in the Benefits section of Oracle.

## Step 5

### Edit or Add a Contact, continued

**Updating an existing contact** – Clicking on the contact name opens a window to edit the information. Locate the section that needs updated and click the **pencil icon**.

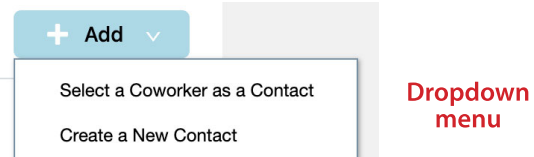
Note: **‘When does this relationship change start’** should reflect the date of your change but this date can’t be before your original effective date.



Relationship

Relationship Son	Emergency Contact No
Relationship Start Date 07/01/2019	Country United States

**Creating a Contact** – Click the **‘+ Add’** button then select **‘Create a New Contact’**.



+ Add ▾

Select a Coworker as a Contact

Create a New Contact

Dropdown menu



Relationship

Dropdown menu

\*Relationship

Son

Foster child

Friend

Granddaughter

Grandson

Nephew

Niece

Parent

Sister

Son

Emergency Contact

Country  
United States

Submit Cancel

Add the following information.

- **Last Name**
- **First Name**
- **Relationship** – Use the drop down menu to choose the most appropriate option.
- **What’s the start date of this relationship?**  
This should be the effective date of your relationship.
- **Gender**
- **Date of Birth**
- **This person is an emergency contact**  
Check this box if your contact will be your emergency contact.
- **Phone Number**
- **Email**
- **Address** – you can elect to use your address or enter a new address by choosing the most appropriate option.

**\*Note: Family and Emergency Contact is used to enter emergency contacts.**  
This section should not be used to enter dependents or beneficiaries for your benefits or life insurance.  
You will provide contact records in the Benefits section of Oracle for benefit related items.

## Step 6

### Submit

Click **‘Submit’** once you have updated or submitted your contact information.

Submit

Cancel

You will receive a notification that your change has been made.

## Update or Add Marital Status

### Step 1

Navigate to the **Personal Information** page.

Click the '**Personal Information**' icon.

Good afternoon, Donald Duck

Me Tools Others

#### QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info

#### APPS

- Directory
- Journeys
- Pay
- Time and Absences
- Personal Information

### Step 2

Edit My Details

Click on '**Personal Details**'.

The screenshot shows a grid of tiles for editing personal details. The tiles are: Personal Details (circled in red), Document Records, Identification Info, Contact Info, Family and Emergency Contacts, Employment Info, and My Compensation. Each tile has a brief description of the information it manages.

### Step 3

Edit Marital Status

Under '**Demographic Info**', click the **pencil icon**.

The screenshot shows the 'Demographic Info' section with fields for Country (United States) and Start Date (08/21/2017). A pencil icon is visible in the top right corner of the section, indicating that the information can be edited.

### Step 4

Edit or Add Marital Status

Use the drop down list in the '**Marital Status**' field.

- Choose the most appropriate status.
- Enter the effective date of the marital status.

Marital Status

Single

\*When does this marital status change start?

mm/dd/yyyy

Enter 08/21/2017 if you're correcting a mistake in this marital status.

**Note:** The '*When does this marital status change start?*' can't be before your hire date or the effective date of your last update. We recognize that many employees were married prior to their start date but the system restricts the recorded effective date to be prior to the hire date.

### Step 5

Submit Marital Status

Click '**Submit**'.

Submit

Cancel

You will receive a notification that your change has been made and will be sent to the human resources department for approval.

## Update or Add Payment Method

### Step 1

**Navigate to the Pay page.**  
Click the 'Pay' Icon.

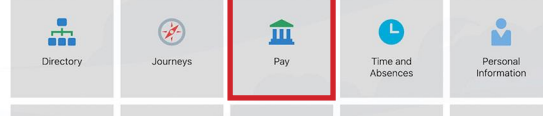
Good afternoon, Donald Duck

Me Tools Others

QUICK ACTIONS

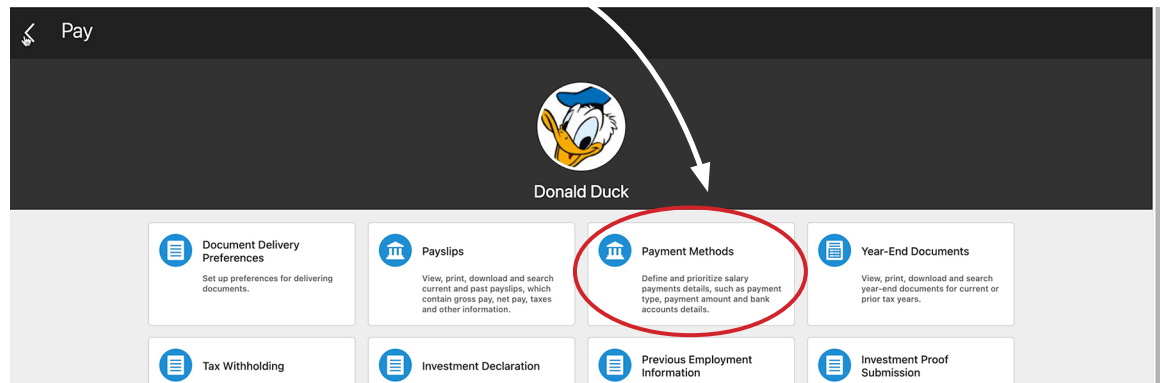
- Personal Details
- Document Records
- Identification Info

APPS



### Step 2

**Edit Payment Methods**  
Click on 'Payment Methods'.

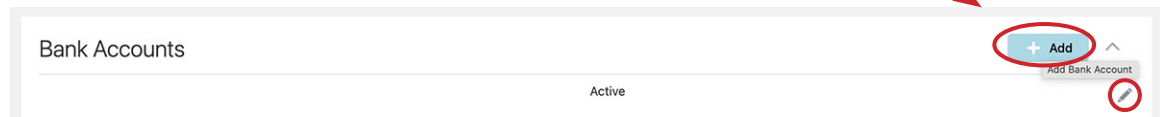


### Step 3

**Update or Add Bank Accounts**

**To update a bank account,** select the pencil icon.  
Update the fields that have changed and click 'Save'.

**To add a new bank account,** select the +Add button.  
Add your banking information and click 'Save'.



Adding a new bank account will  
bring up this screen.

## Step 4

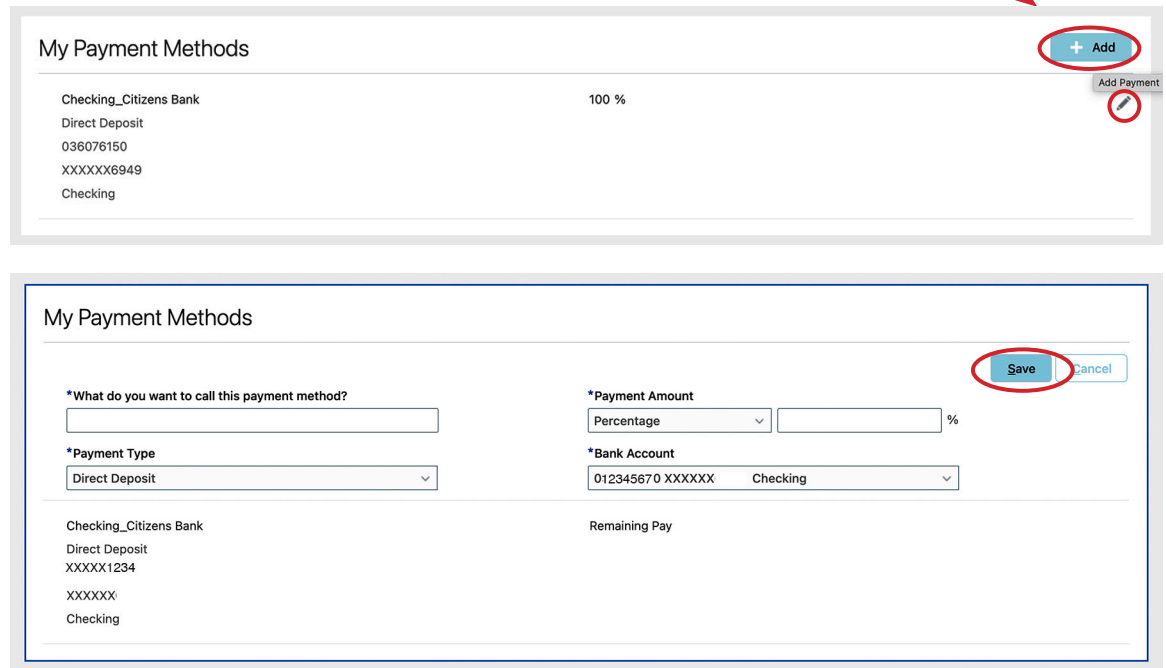
### Update or Add a Payment Method

To **update your payment** method, click the **pencil icon**.

Update the fields you want to change and click '**Save.**'

To **add a new payment** method click '**+ Add.**'

Complete the required fields and click '**Save.**'



The screenshot shows the 'My Payment Methods' page. At the top right, there is a blue button with a white plus sign and the text '+ Add'. This button is circled in red. A red arrow points from the text 'To add a new payment method click '+ Add.' to this button. Below the button, there is a table with one row of payment methods. The table has two columns: the first column contains the bank name and account type, and the second column contains the payment percentage. The first row shows 'Checking\_Citizens Bank' with a '100 %' payment percentage. Below the table, there is a form for adding a new payment method. The form has two columns. The left column has two sections: the first section is for the bank name and account type, and the second section is for the payment type. The right column has two sections: the first section is for the payment amount and type, and the second section is for the bank account number and type. At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is circled in red.

My Payment Methods	
Checking_Citizens Bank Direct Deposit 036076150 XXXXXX6949 Checking	100 %

\*What do you want to call this payment method?  
[Text Field]

\*Payment Type  
Direct Deposit [Dropdown]

\*Payment Amount  
Percentage [Dropdown] [Text Field] %

\*Bank Account  
012345670 XXXXXX Checking [Dropdown]

Checking\_Citizens Bank  
Direct Deposit  
XXXXXX1234  
XXXXXX  
Checking

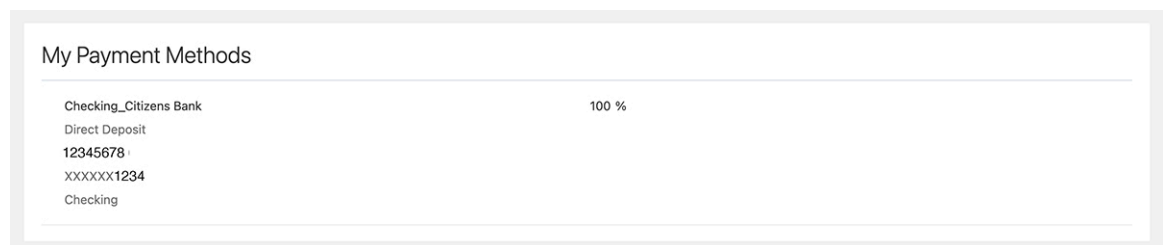
Remaining Pay

Save Cancel

## Step 5

### Reviewing Payment Method

After you have entered your bank information and clicked Save, a summary page will populate. Review to ensure your information is correct.



The screenshot shows the 'My Payment Methods' page. It displays a table with one row of payment methods. The table has two columns: the first column contains the bank name and account type, and the second column contains the payment percentage. The first row shows 'Checking\_Citizens Bank' with a '100 %' payment percentage. Below the table, there is a form for adding a new payment method. The form has two columns. The left column has two sections: the first section is for the bank name and account type, and the second section is for the payment type. The right column has two sections: the first section is for the payment amount and type, and the second section is for the bank account number and type. At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is circled in red.

My Payment Methods	
Checking_Citizens Bank Direct Deposit 12345678 XXXXXX1234 Checking	100 %

**Note:** Your employer may send a test or "prenote" file to your bank validating the information entered into the system. Depending on when the banking information was entered into the system it could take one to two pay cycles for the prenote process to complete. During this period, wages and expenses will be issued on a paper check.

# Update or Add Tax Withholding

## Step 1

Navigate to the Pay page.

Click the 'Pay' Icon.

Good afternoon, Donald Duck

Me Tools Others

### QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info

### APPS

- Directory
- Journeys
- Pay
- Time and Absences
- Personal Information

## Step 2

Edit Tax Withholding

Click on 'Tax Withholding'.

Document Delivery Preferences  
Set up preferences for delivering documents.

Payslips  
View, print, download and search current and past payslips, which contain gross pay, net pay, taxes and other information.

Payment Methods  
Define and prioritize salary payments details, such as payment type, payment amount and bank accounts details.

Year-End Documents  
View, print, download and search year-end documents for current or prior tax years.

**Tax Withholding**  
Go here to update your federal and state income tax withholding. Check this information when your personal or financial situation...

Investment Declaration  
Choose the income tax calculation method and declare your investment information for the financial year here. View and...

Previous Employment Information  
Update and view your previous employment information here, as per the income tax computation sheet issued by your previous...

Investment Proof Submission  
Upload and view the documents of proof here for the investments you have declared for the financial year.

## Step 3

Edit or Add Tax Withholding

To update your tax withholding, find the tax type you would like to update Federal or Regional (state and local) and click the appropriate **pencil icon**.

Allegheny Intermediate Unit

Federal

Calculation Component Federal Taxes	Start and End Dates 05/01/2019	
Forms Federal		
Filing Status Single	Allowances 4	
Exempt from Federal Income Tax		
Additional Tax Amount 0 USD		

Show Prior Records

Regional

View Active

Calculation Component State Taxes	Start and End Dates 08/21/2017	
State PA		
Calculation Component Pennsylvania PSD	Forms PA > Allegheny Intermediate Unit	
State PA	Start and End Dates 08/21/2017	
Tax Reporting Unit Allegheny Intermediate Unit		
Resident PSD Code 710902	Work PSD Code 731501	
Resident School District Northgate SD	Work School District Steel Valley SD	

## Step 4

### Updating or Adding Tax Withholding

Update the field(s) that changed, read and click the **"I Agree"** button and click **'Save'**.

Basic Information	
Calculation Component Pennsylvania PSD	Forms PA > Allegheny Intermediate Unit
Component Sequence 1	
*When does this change start? <div>12/04/2023</div>	State PA
	Tax Reporting Unit Allegheny Intermediate Unit
<div>Note: You cannot backdate a tax withholding change. It must be a current or future date.</div>	
Residency Certificate	
Resident PSD Code <div>710902</div>	Work PSD Code <div>731501</div>
Resident School District <div>Northgate SD</div>	Work School District <div>Steel Valley SD</div>
<div>*Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.</div>	
<div><input type="checkbox"/> I agree</div>	

## View Your Payslip

### Step 1

Navigate to the Pay page.

Click the 'Pay' Icon.

Good afternoon, Donald Duck

Me Tools Others

#### QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info

#### APPS

- Directory
- Journeys
- Pay
- Time and Absences
- Personal Information

### Step 2

To view your Payslip

Click on 'Payslips'.

**Document Delivery Preferences**  
Set up preferences for delivering documents.

**Payslips**  
View, print, download and search current and past payslips, which contain gross pay, net pay, taxes and other information.

**Payment Methods**  
Define and prioritize salary payments details, such as payment type, payment amount and bank accounts details.

**Year-End Documents**  
View, print, download and search year-end documents for current or prior tax years.

**Tax Withholding**  
Go here to update your federal and state income tax withholding. Check this information when your personal or financial situation...

**Investment Declaration**  
Choose the income tax calculation method and declare your investment information for the financial year here. View and...

**Previous Employment Information**  
Update and view your previous employment information here, as per the income tax computation sheet issued by your previous...

**Investment Proof Submission**  
Upload and view the documents of proof here for the investments you have declared for the financial year.

### Step 3

View Payslip

Find the pay date on the left and click to download a PDF of the entire payslip.

**Details**

Last 3 Months

11/30/2023	1,234.56 USD
11/30/2023_1,234.56	
11/16/2023 to 11/30/2023	
11/15/2023	1,234.56 USD
11/15/2023_1,234.56	
11/01/2023 to 11/15/2023	
10/31/2023	1,234.56 USD
10/31/2023_1,234.56	
10/16/2023 to 10/31/2023	
10/13/2023	1,234.56 USD
10/13/2023_1,234.56	
10/01/2023 to 10/15/2023	
09/29/2023	1,234.56 USD
09/29/2023_1,234.56	
09/16/2023 to 09/30/2023	
09/15/2023	1,234.56 USD
09/15/2023_1,234.56	
09/01/2023 to 09/15/2023	

Last 3 Months

Last 3 Months

Last 12 Months

Specific Date Range

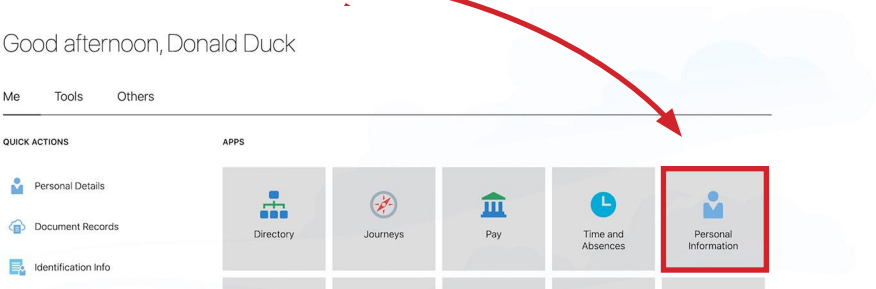
The screen defaults to view the last three months of payslips, but the dropdown allows an employee to select a specific pay date or range of pay dates.



# Add Document

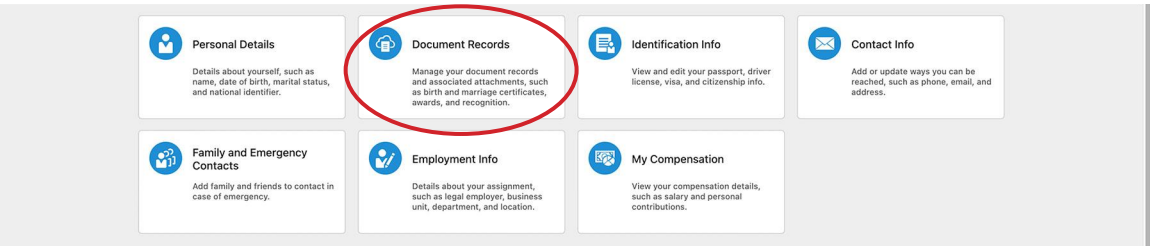
## Step 1

Navigate to the **Personal Information** page.  
Click the **'Personal Information'** icon.



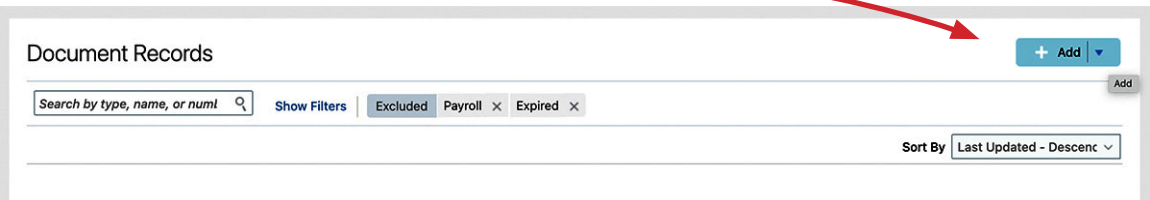
## Step 2

**My Documents**  
Click **'Document Records'**.



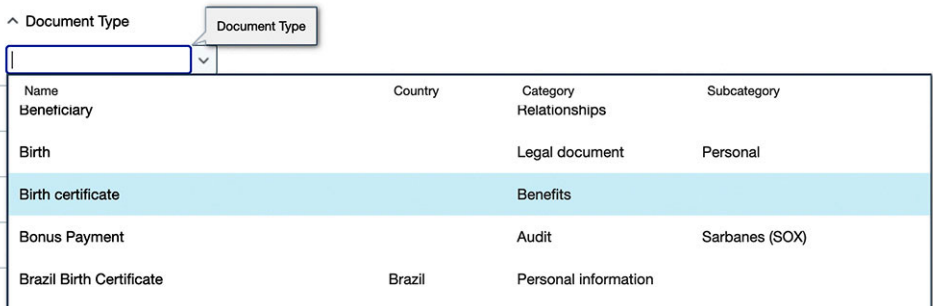
## Step 3

**Adding Documents**  
Click on the **'+ Add'** sign



## Step 4

**Choosing Document Type**  
Use the drop down menu and choose in the most appropriate Document Type by typing in the Document Type field.

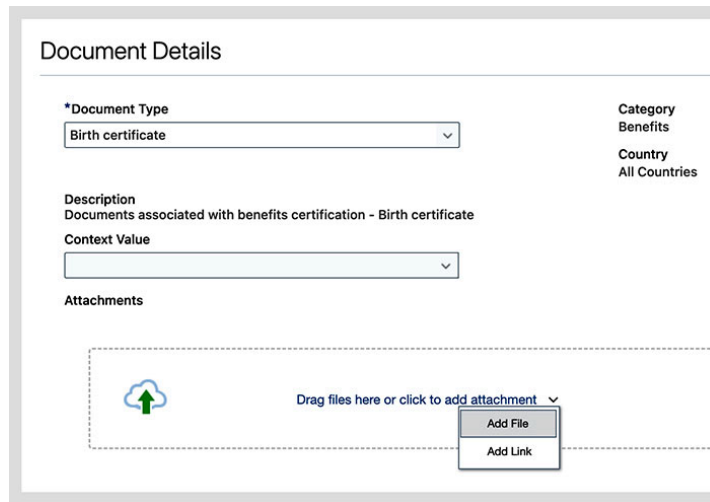


## Step 5

### Adding Document

Scroll down the page until you see Attachments.

Click in the **'Drag file here or click to add attachment'**. Then click **'Add File'**.



The screenshot shows the 'Document Details' form. It includes a dropdown for 'Document Type' set to 'Birth certificate', a 'Category' of 'Benefits', and a 'Country' of 'All Countries'. The 'Description' is 'Documents associated with benefits certification - Birth certificate'. There is a 'Context Value' dropdown. Below these is the 'Attachments' section, which contains a dashed box with a cloud and arrow icon, the text 'Drag files here or click to add attachment', and two buttons: 'Add File' and 'Add Link'.

## Step 6

### Choose Document

Navigate to your document and add.

## Step 7


### Submit Document

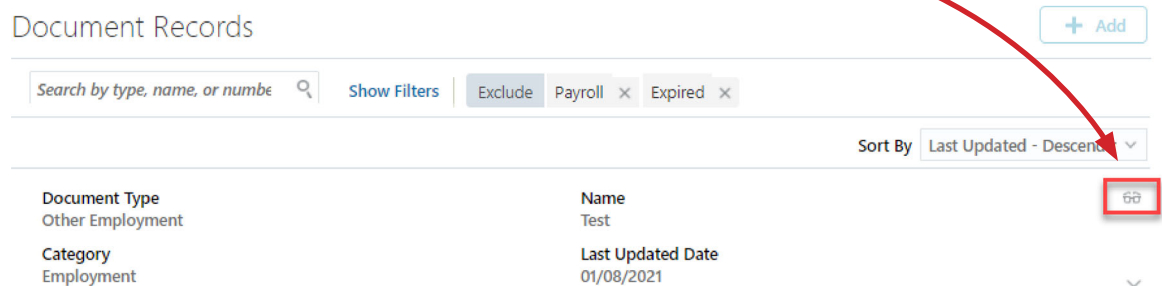
Scroll to the top of the page and click **'Submit'**.

Submit

## Step 8

### Review Upload

Once you have submitted your document, the Document Records page will populate. You can review the page to ensure you have uploaded and submitted your document by clicking the  glasses icon.



The screenshot shows the 'Document Records' page. It has a search bar with the placeholder 'Search by type, name, or number', a 'Show Filters' button, and filter tags for 'Exclude', 'Payroll', and 'Expired'. A '+ Add' button is in the top right. The 'Sort By' dropdown is set to 'Last Updated - Descending'. Below this is a table with the following data:

Document Type	Name	Last Updated Date
Other Employment	Test	01/08/2021

A red arrow points from the glasses icon in the text above to a glasses icon in the bottom right corner of the table, which is highlighted with a red box.