

# Change Location via Quick Actions

## Lesson Objective:

Upon completion of the Change Location via Quick Actions lesson, you will be able to:

### Objective

- Update an employee's location using the Change Location quick action.



The location change process allows the Coordinator to update an employee's work location with an effective start date and a defined business reason. This ensures that location changes are properly tracked and aligned with organizational policies and employment records.

Position synchronization controls how assignment values behave during the location change. When enabled, values automatically align with the position. When disabled, the Coordinator can either retain the current assignment values or synchronize them with the position.

Additional employment details such as managers, payroll actions, documents, and comments can be reviewed and updated as part of the process. Once all required information is verified, the transaction is submitted to complete the location change.

## Focus



- This lesson focuses on changing an employee's work location using the quick action process. It covers selecting the correct change type and defining when the location change should begin. The focus is on initiating and controlling the location change accurately.
- The lesson highlights the selection of an action reason and the impact of position synchronization. It explains how assignment values behave when synchronization is enabled or disabled. This ensures controlled handling of assignment attributes.
- The lesson also focuses on selecting a new location at the assignment level. It ensures the updated location is correctly applied to the employee record. This step confirms where the employee will be assigned going forward.

# Navigation

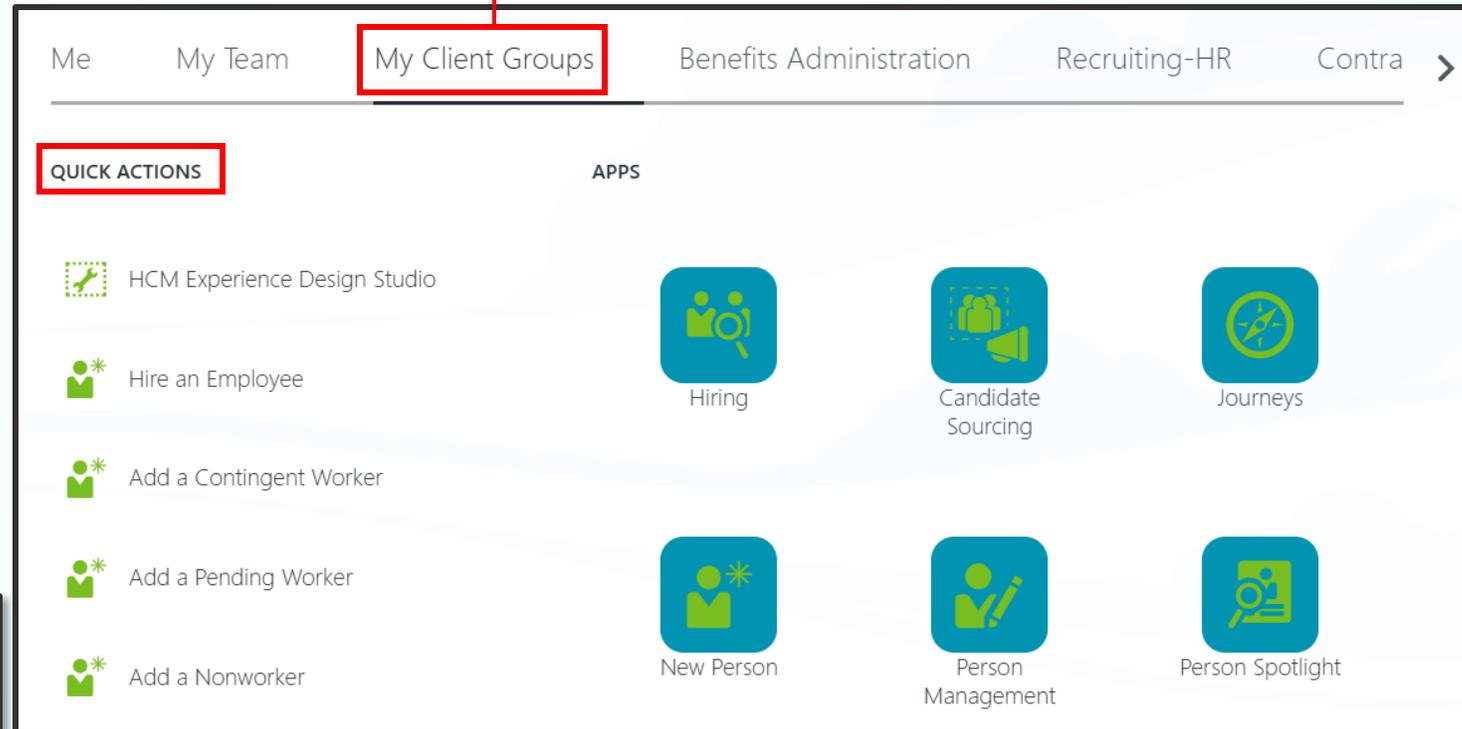


**My Client Groups →**  
**Show More (Quick Actions) →**  
**Employment →**  
**Change Location**

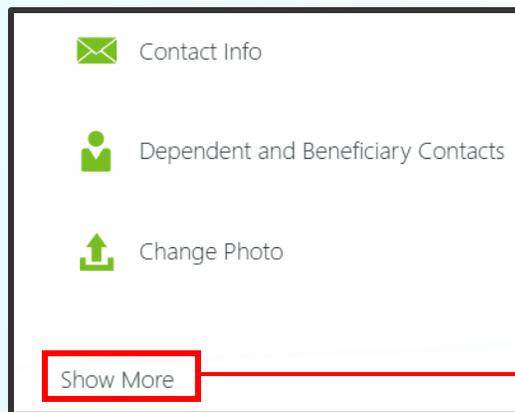
# Change Location via Quick Actions

1

Select the My Client Groups tab



The screenshot shows the 'My Client Groups' tab selected in a navigation bar. Below the navigation bar, there are two sections: 'QUICK ACTIONS' and 'APPS'. The 'QUICK ACTIONS' section contains a list of actions: 'HCM Experience Design Studio', 'Hire an Employee', 'Add a Contingent Worker', 'Add a Pending Worker', and 'Add a Nonworker'. The 'APPS' section contains a grid of application icons: 'Hiring', 'Candidate Sourcing', 'Journeys', 'New Person', 'Person Management', and 'Person Spotlight'.



The screenshot shows a dropdown menu with three items: 'Contact Info', 'Dependent and Beneficiary Contacts', and 'Change Photo'. A 'Show More' link is highlighted at the bottom of the menu.

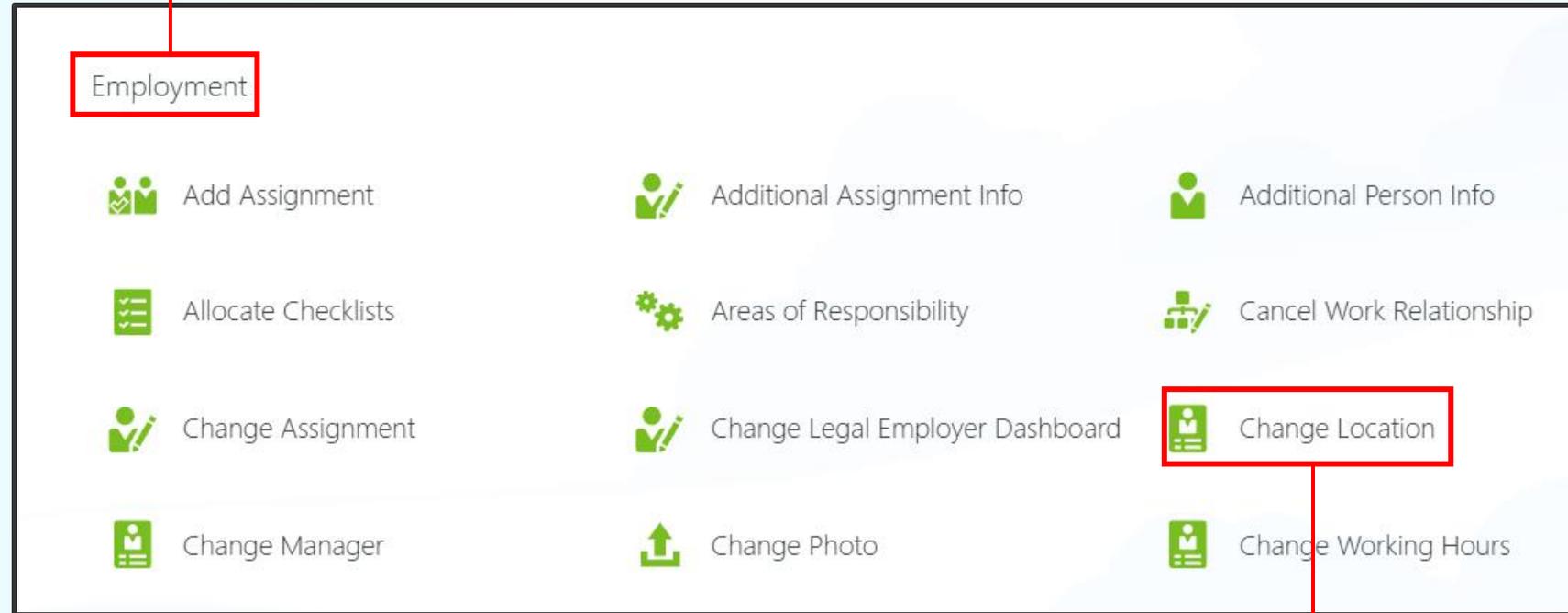
2

From the Quick Actions section, select the Show More link from the drop-down list

# Change Location via Quick Actions

3

Locate the Employment section



Employment

- Add Assignment
- Allocate Checklists
- Change Assignment
- Change Manager
- Additional Assignment Info
- Areas of Responsibility
- Change Legal Employer Dashboard
- Change Photo
- Additional Person Info
- Cancel Work Relationship
- Change Location
- Change Working Hours

4

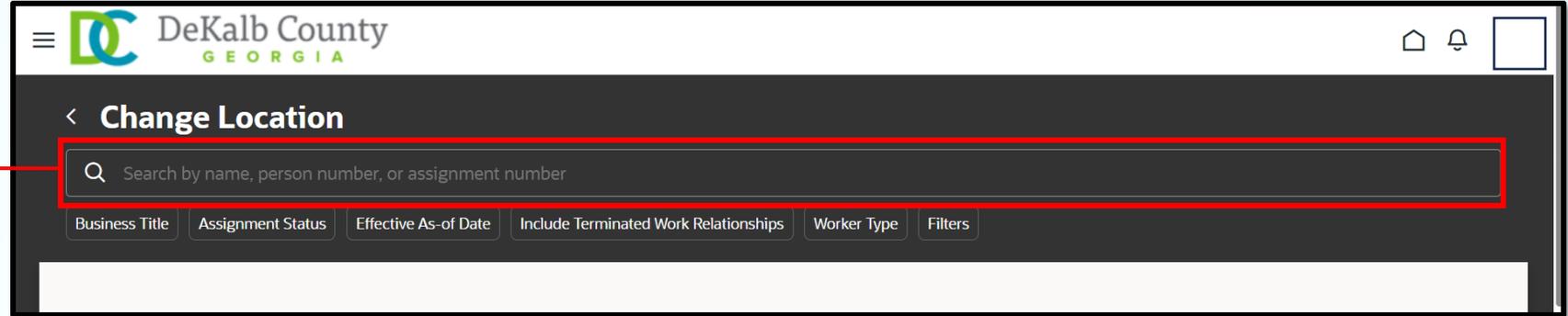
Select Change Location under the Employment section

# Change Location via Quick Actions



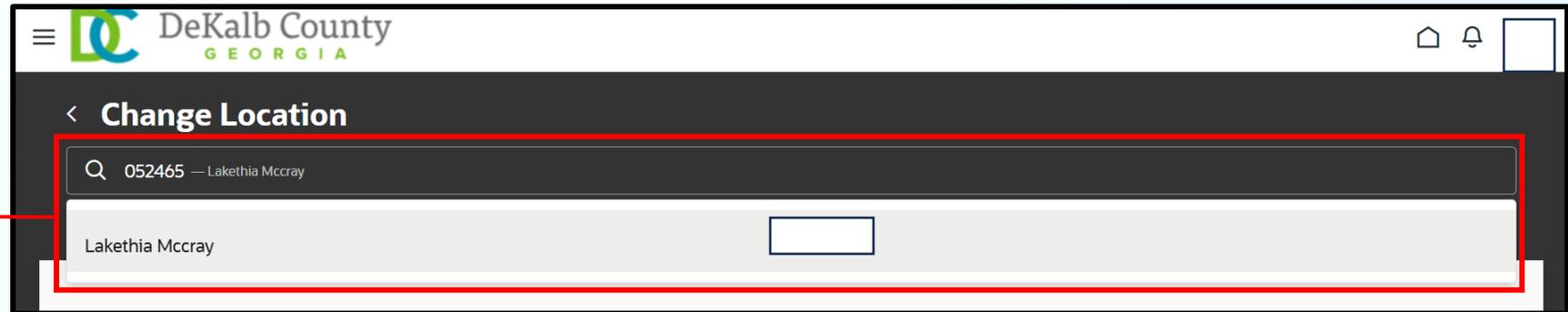
5

From the Search field, key in the Employee's name, person number, or assignment number



6

Select the Employee from the search result



# Change Location via Quick Actions

Change Location

LM Info to include  
Lakethia Mccray, 32130 - Detention Sergeant

**Managers**  
Add or remove managers, and change manager relationship for a worker.

**Payroll details**  
Update payroll details such as overtime period, time card required, and so on.

**Document records**  
Add document records and associated attachments.

**Comments and attachments**  
Add additional comments and attachments for approver.

Cancel **Continue** Submit

1 | 5

Info to include

When and why

Position override

Assignment

Need help? Contact us.

7

Check the boxes for the sections to be included in the process under Info to Include page

8

Click on Continue to move to the next section

# Change Location via Quick Actions

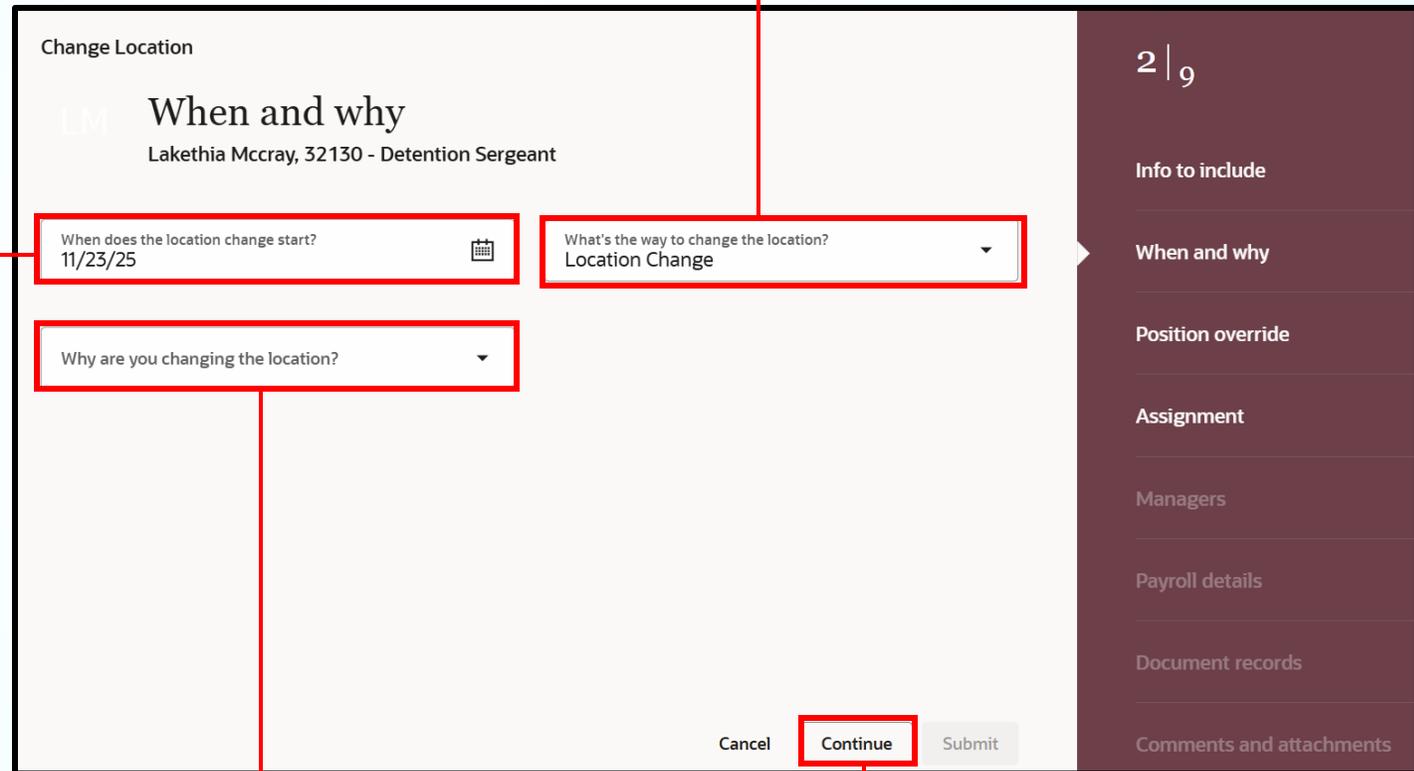
9

Key in the date for "When does the location change start?"

The calendar icon may also be selected, and the date selected from the calendar.

10

Select Location Change in the What's the way to change the location? dropdown list



Change Location

LM When and why  
Lakethia Mccray, 32130 - Detention Sergeant

When does the location change start?  
11/23/25

What's the way to change the location?  
Location Change

Why are you changing the location?

Cancel Continue Submit

2 | 9

Info to include

When and why

Position override

Assignment

Managers

Payroll details

Document records

Comments and attachments

11

Select the action reason in the "Why are you changing the location?" Drop-down list.

12

Click on the Continue button.

# Change Location via Quick Actions

Change Location

## LM Position override

Lakethia Mccray, 32130 - Detention Sergeant

3 | 9

**Information**

The attribute switch is disabled when position synchronization is enabled. Set it to off to retain the assignment value, or on to synchronize from the position.

Attributes	Position	Assignment
<input type="checkbox"/>	Synchronize from Position	-
<input type="checkbox"/>	Job	32130 - Detention Sergeant

Info to include

When and why

Position override

Assignment

Managers

Payroll details

Change Location

## LM Position override

Lakethia Mccray, 32130 - Detention Sergeant

3 | 9

**Information**

The attribute switch is disabled when position synchronization is enabled. Set it to off to retain the assignment value, or on to synchronize from the position.

Attributes	Position	Assignment
<input type="checkbox"/>	Synchronize from Position	-
<input checked="" type="checkbox"/>	Job	32130 - Detention Sergeant
<input checked="" type="checkbox"/>	Grade	ENF2_E16
<input checked="" type="checkbox"/>	Department	03220 - SHERIFF'S OFFICE - JAIL

Info to include

When and why

Position override

Assignment

Managers

Payroll details

Document records

Comments and attachments

! When position synchronization is **enabled** for an attribute, the switch is **disabled**.

- If position synchronization is **disabled** and you want to keep the assignment's current value, set the switch to **off**.
- If position synchronization is **disabled** and you want the assignment's value to match the value on the position, set the switch to **on**.

# Change Location via Quick Actions

Change Location

LM **Position override**  
Lakethia Mccray, 32130 - Detention Sergeant

**Information**  
The attribute switch is disabled when position synchronization is enabled. Set it to off to retain the assignment value, or on to synchronize from the position.

	Attributes	Position	Assignment
<input type="checkbox"/>	Synchronize from Position	-	-
<input checked="" type="checkbox"/>	Job	32130 - Detention Sergeant	32130 - Detention Sergeant
<input checked="" type="checkbox"/>	Grade	ENF2_E16	ENF2_E16

Cancel **Continue** Submit

3 | 9

- Info to include
- When and why
- Position override
- Assignment
- Managers
- Payroll details
- Document records
- Comments and attachments



Click on **Continue** to move to the next section

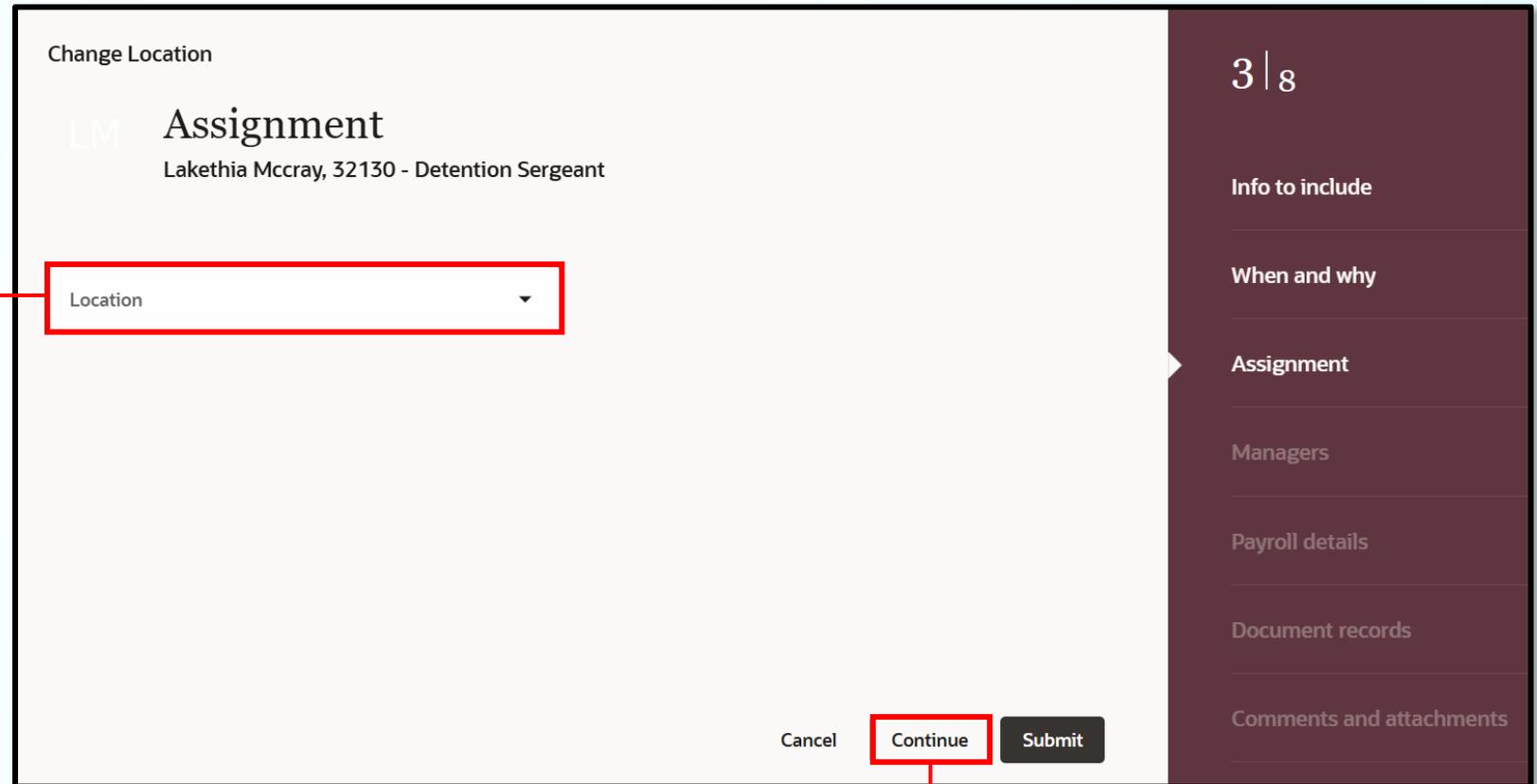


The attribute switch is disabled when position synchronization is enabled. Set it to off to retain the assignment value, or on to synchronize from the position.

# Change Location via Quick Actions

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On the **Assignment** page, type select the new location from the list of values



Change Location

LM Assignment  
Lakethia Mccray, 32130 - Detention Sergeant

Location

Cancel Continue Submit

3 | 8

- Info to include
- When and why
- Assignment
- Managers
- Payroll details
- Document records
- Comments and attachments

Click on **Continue** to move to the next section

15

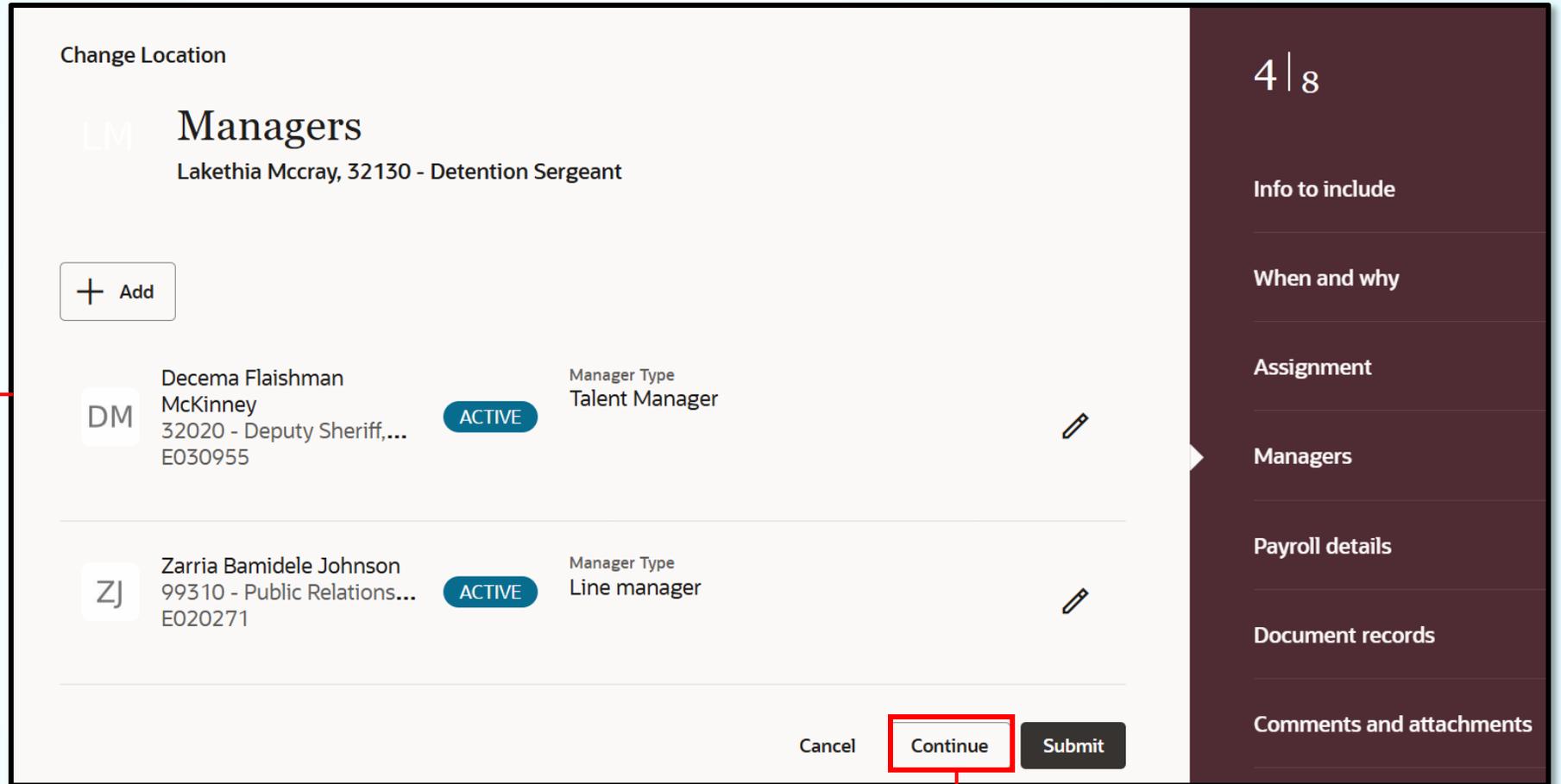


When the Synchronize from Position is set to off, check the location attribute is set to on to change the Location in Assignment page.

# Change Location via Quick Actions

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The Coordinator can view the Employee's Manager(s) list and can perform required actions on **Managers** page for example, Add or Edit the records



The screenshot shows a 'Change Location' interface. At the top, it says 'Change Location' and 'LM Managers'. Below that, it lists 'Lakethia Mccray, 32130 - Detention Sergeant'. There is an '+ Add' button. Below the list, there are two manager entries:

ID	Name	Address	Status	Manager Type	Action
DM	Decema Flaishman McKinney	32020 - Deputy Sheriff, ... E030955	ACTIVE	Talent Manager	Edit
ZJ	Zarria Bamidele Johnson	99310 - Public Relations... E020271	ACTIVE	Line manager	Edit

At the bottom right, there are three buttons: 'Cancel', 'Continue' (highlighted with a red box), and 'Submit'. On the right side of the interface, there is a sidebar with a progress indicator '4 | 8' and several menu items: 'Info to include', 'When and why', 'Assignment', 'Managers', 'Payroll details', 'Document records', and 'Comments and attachments'.

Click on **Continue** to move to the next section

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# Change Location via Quick Actions

Change Location

Payroll details  
Lakethia Mccray, 32130 - Detention Sergeant

5 | 8

Info to include

When and why

Assignment

Managers

Payroll details

Document records

Comments and attachments

Need help? Contact us.

What action would you like to take?

Edit Current Payroll Frequency

Transfer to a New Payroll Frequency

Payroll Frequency

Payroll  
Regular Biweekly

Overtime Period for Payroll

Time Card Required for Payroll

Other Info

Overtime Period for Assignment  
14 Days (Biweekly Pay Period)

Time Card Required for Assignment  
Yes

Change Location

Payroll details  
Lakethia Mccray, 32130 - Detention Sergeant

5 | 8

Info to include

When and why

Assignment

Managers

Payroll details

Document records

Comments and attachments

Need help? Contact us.

What action would you like to take?

Edit Current Payroll Frequency

Transfer to a New Payroll Frequency

New Payroll Frequency

Payroll

Overtime Period for Payroll

Time Card Required for Payroll

Current Payroll Frequency

Payroll

Overtime Period for Payroll

Cancel **Continue** Submit



- If necessary, the Coordinator can select the required action available from **“What action would you like to take”** field on Payroll details page.
- Click Continue to move to the next section.

# Change Location via Quick Actions

Change Location

Document records  
Lakethia Mccray, 32130 - Detention Sergeant

+ Add

After you add a document record, you can view it here.

6 | 8

- Info to include
- When and why
- Assignment
- Managers
- Payroll details
- Document records
- Comments and attachments
- Need help? Contact us.

Cancel Continue Submit

Change Location

Document records  
Lakethia Mccray, 32130 - Detention Sergeant

+ Add

Document Type Required

Cancel Save

Cancel Continue Submit

- The Coordinator can add Documents from Document records page
- Click **Add(+)** to add the new Document Record
- Select the **Document Type** from the List of Values and click **Save** after adding the Document
- Click **Continue** to move to the next section

# Change Location via Quick Actions

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Add required Comments on  
Comments page

Change Location

LM Comments and attachments  
Lakethia Mccray, 32130 - Detention Sergeant

Comments

0/500

Cancel Continue **Submit**

7 | 8

Info to include

When and why

Assignment

Managers

Payroll details

Document records

Comments and attachments

Need help? Contact us.

Click on **Submit** to submit the  
transaction

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## Conclusion



- The learner can now initiate a location change using the quick action process. They understand how to define the change type and effective start date. This ensures the location change is applied correctly.
- The learner understands how to select the appropriate action reason for the location change. They know how this selection supports the transaction process. This ensures clear justification for the change.
- The learner now understands how position synchronization controls assignment values. They can determine whether assignment values should remain unchanged or match the position. This ensures accurate assignment data control.
- The learner can now select and apply a new location on the assignment record. They understand how the updated location is assigned to the employee. This confirms successful application of the location change.
- The learner can now review and manage the employee's manager information during the process. They understand how to add or edit manager records when required. This ensures managerial details remain accurate.