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Human Resources
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Human Resources Overview

J.D. Edwards understands that there is no such thing as a standard Human Resources department. Management depends on you to respond to workforce and industry changes and increasing government regulations, as well as your organization's policies and procedures. The information you need is unique and often complex.

The J.D. Edwards Human Resources system makes it easy to track the information that you need to meet both your immediate and long-range goals, as well as the demands of change and growth within your company and industry. You can access and compile the information quickly and provide quick answers to questions. Because the Human Resources system manages many mundane and repetitive tasks, you have more time to play a strategic role on your organization's management team.

The overview of the Human Resources system consists of the following topics:

- System integration
- Human Resources features
- Tables and descriptions

System Integration

To facilitate data entry for both Payroll and Human Resources users, you enter much human-resources related information into the HR and Payroll Foundation system. This system contains the central database for all of the information that human resources and payroll users typically share. For example, you use the foundation system to track the following information:

- Complete employee information
- Job information
- Pay type, deduction, benefit, and accrual (PDBA) information
- Time accounting information

The Human Resources system contains additional functions, such as recruitment management and position control, that are specific to human resources users.

An integrated, central database means that when the employee's information is updated, the employee's payroll information is also updated. A central database accomplishes the following:

- Eliminates redundant data entry



- Manages current and accurate information across all your business operations
- Improves communication among departments

Both human resources and payroll users can enter information into the foundation system. However, to prevent unauthorized access to confidential information, you can set up system security that allows users to access only the information that they need in order to perform their jobs. Typically, your system administrator sets up system security during system implementation. The system administrator can set up security for an entire form or for individual fields on a form.

To simplify your processes and facilitate communication within your organization, the Human Resources system also integrates with other J.D. Edwards systems, including the following systems:

Address Book

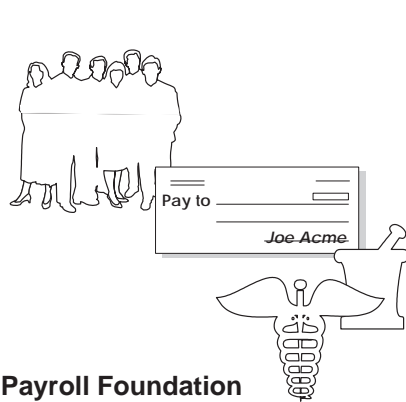
The Address Book system contains employees' names, addresses, and tax IDs.

General Accounting

You can use the Human Resources system to create salary budgets by business unit and update them in the general ledger.

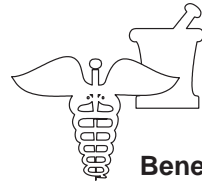
The following graphic shows how the HR and Payroll Foundation system supports Human Resources, Benefits, and Payroll:

HR and Payroll System Integration



HR and Payroll Foundation

- Quick Hire (**HR**)
- Pay Types, Deductions, Benefits, and Accrual Setup (**B, P**)
 - Time Entry (**P**)
 - Automatic Accounting Instructions (**P**)
- Job Information (**B, HR, P**)
- Employee Information (**B, HR, P**)
 - Employee Self-Service
- Employee History and Turnover Tracking



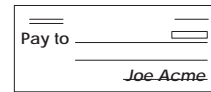
Benefits

- Benefits Administration
- Benefits Setup
- Employee Self-Service



Human Resources

- Applicant Information
- Position Control (**GA**)
- Requisitions



Payroll

Key

B = Integrates with Benefits

HR = Integrates with Human Resources

P = Integrates with Payroll

GA = Integrates with General Accounting

Human Resources Features

In addition to the features included in the HR and Payroll Foundation system, the Human Resources system provides the following features:

- Requisition management
- Applicant tracking
- Position budget management
- Benefits administration

See Also

- The *HR and Payroll Foundation Guide* for more information about features that are common to human resources, payroll, and time accounting

Requisition Management

To begin the process of filling a vacancy within your organization, you can create online requisitions that include detailed information about the open position and its associated job.

By identifying open requisitions, you can create internal job postings, which you can make available to your entire organization. The flexibility of the system lets you associate multiple requisitions with a single applicant or multiple applicants with a single requisition. Using the requisition features, you can analyze data to evaluate your recruiting process.

You can use Enterprise Workflow Management to facilitate the process of getting approval for a requisition. For example, you can automate formerly paper-based tasks, such as notifying a manager that a requisition is waiting for approval, by using an e-mail-based process flow across a network. The demonstration data included with the Human Resources system includes a workflow process for requisition approvals.

Because recruiting is expensive, you need to know where your efforts have been most effective. You can track how long a requisition is open before it is filled. You can also track the costs associated with filling the requisition, such as advertising, travel, and recruiter fees.

Applicant Tracking

In today's job market, one opening in your company can result in hundreds of resumes. You need to be able to quickly identify the applicants who meet the requirements of an open requisition. With the Human Resources system, you can manage extensive information about each applicant, such as asking salary, available date, education, prior experience, and foreign language proficiency.

You can then search for applicants that meet specific criteria. The system's extensive search capabilities make it simple to reduce a list of applicants to those you want to seriously consider. You can then provide your managers with a list of qualified applicants.

When you hire an applicant, the system automatically updates the person's employee master record to indicate that he or she is an employee. You can also set up your system to require someone to enter payroll information before the hiring process is complete.

Position Budget Management

The Human Resources system provides comprehensive tools for position budget management, so you can improve how you manage employee costs. By managing your position budgets within the Human Resources system, your department can become more proactive at managing costs.

As part of managing your budget, you can perform the following tasks:

- Review the approved head count for a position before you create a requisition.
- Track position effective dates and the resulting budget calculations.
- Automatically update position activity when you change an employee record.
- Compare projected salaries through year end with the approved budget for each position.
- Determine year-end costs by developing projections based on hours, salary amounts, head count, or full-time equivalents.
- Track positions and head count by company and department.
- Post position budgets and accounts to the general ledger.

Benefits Administration

The Benefits Administration module provides you with the tools to manage your organization's benefit plans with online integration to other human resource information and payroll processing. With the Benefits Administration module, you can respond to employees' requests for information about their benefits.

See Also

- The *Human Resources – Benefits Guide* for information about benefits administration

Tables and Descriptions

The Human Resources system uses the following tables:

**Address Book Master
(F0101) and Address by
Date (F0116)**

Contains name and address information for all employees and applicants. Employee records have a search type of E, and applicant records have a search type of A.

**Employee Master
(F060116)**

Contains employee information for the Payroll and Human Resources systems.

Job Information (F08001)	Contains information for job ID and for the job evaluation. The job ID is a combination of the job type and job step. (Job steps are levels of advancement within a job type.)
Supplemental Database Types of Data (F00090)	Contains data types and their respective column headings. Use these data types to define the types of supplemental information that you want to track for jobs, employees, applicants, and requisitions.
Supplemental Data (F00092)	Contains multiple values with a specific type of data for individual applicants, employees, jobs, and requisitions.
Requisition Information (F08102)	Contains the definition of the requisition, including requisition status and fiscal year.
Applicant Master (F08401)	Contains applicant information, including applicant status and Equal Employment Opportunity Commission (EEOC) information.
Position Master (F08101)	Contains the position definition, with budget information at the position level.
Position Accounts (F081012)	Contains accounting information, split by account, for a position.
Position Budget Detail (F08111)	Contains position detail at the employee activity level.

Requisitions



Requisitions

You enter a requisition to begin the process of filling a vacancy within your organization. A requisition is a record or document that contains information about the open position (an employee's assignment for a fiscal year) and job (the duties an employee performs for your organization). A vacancy is a job opening or unfilled head count (number of people) in a position.

After you enter a requisition, you typically need to wait for the appropriate person to approve it before you can begin the process of filling the requisition. You can use Enterprise Workflow Management to automate formerly paper-based tasks. For example, you can notify a manager that a requisition is waiting for approval by using an e-mail-based process flow across a network.

You can track the status of a requisition from its initial creation to its approval or rejection to its close.

You can associate a candidate with one or more requisitions. When you hire an applicant or transfer an employee to a new position, the system automatically indicates that the requisition is closed.

Working with requisitions includes the following tasks:

- Entering requisition information
- Working with requisitions
- Reviewing requisition reports



Entering Requisition Information

You enter requisition information to begin the process of filling one or more vacancies within your organization. The requisition contains job and position information that you can use to match a candidate to a vacancy.

When you enter requisition information, you can track additional information that is unique to your organization or your industry. For example, if you need a senior consultant who speaks fluent Spanish, you can track Spanish fluency on the requisition.

To help you manage your workflow, you can enter requisition information before the appropriate manager has approved it and indicate that it is waiting for approval. Then, after the manager approves or rejects the requisition, you can update its status.

You can use Enterprise Workflow Management to facilitate the process of getting approval for a requisition. For example, you can notify a manager that a requisition is waiting for approval by using an e-mail-based process flow across a network.

After you enter requisition information, you can review the information to verify that it is correct. You can review detailed information about individual requisitions or about all of the requisitions for a specific business unit or job type. For example, you can review all of the requisitions in business unit 701 to determine which of them have been approved and the name of the person who approved them.

Entering requisition information includes the following tasks:

- Enter initial requisition information
- Enter supplemental data for requisitions

Entering Initial Requisition Information

You enter initial requisition information to identify a new vacancy within your organization. For example, you might enter the following types of initial requisition information:

- Fiscal year
- Home business unit
- Job type
- Job step

You can also attach the following types of objects to a requisition:

- Text documents
- Scanned images
- Links to other OneWorld applications and to other software packages

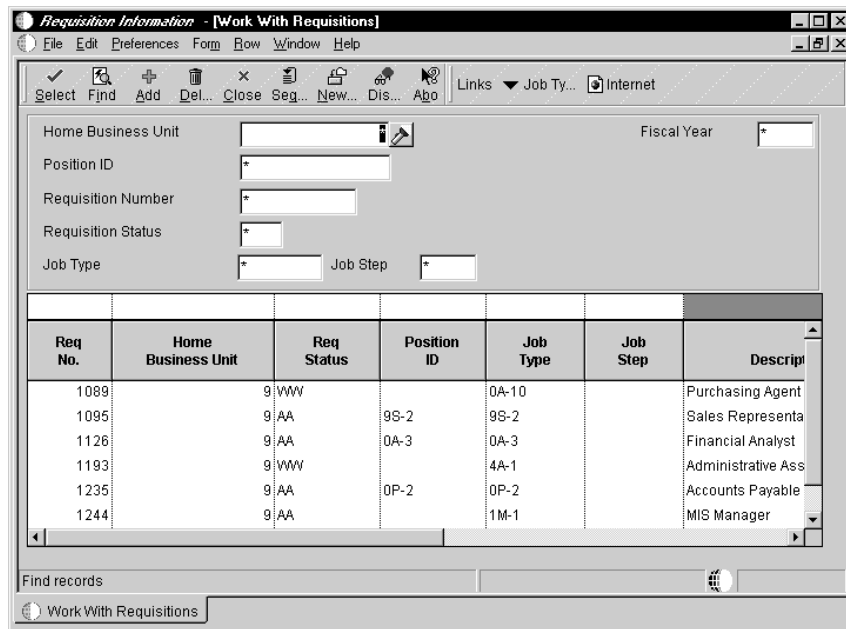
For example, you can attach a Microsoft Word document that lists approval or rejection information for the requisition.

Basic requisition information is the minimum amount of information that you should track. It includes information such as the status of the requisition and the job to which it applies. Additional information includes optional items such as pay information and information that is unique to your organization.

▶ To enter initial requisition information

From the Requisitions menu (G08BR1), choose Requisition Information.

On Work With Requisitions



1. Click Add.

2. On Requisition Information, complete the following field to assign a specific requisition number:

- Requisition Number

If you leave this field blank, the system assigns the next available number.

3. Click the Primary Information tab and complete the following fields:

- Requisition Status
- Home Business Unit
- Security Business Unit
- Requested By

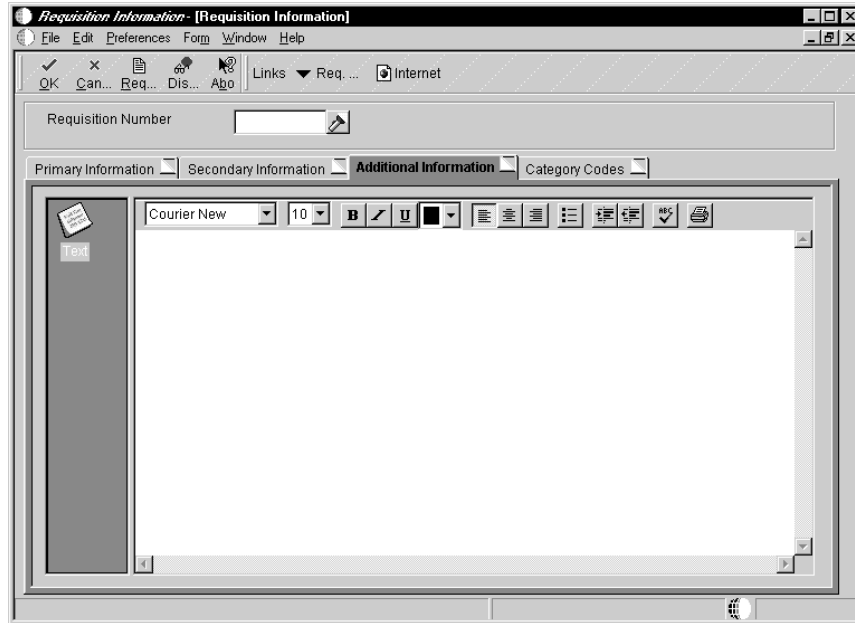
4. Complete any of the following fields, as necessary:

- Requisition Date
- Effective From Date
- Effective Thru Date
- Fiscal Year
- Position ID
- Job Type/Step
- Approved By
- Approval Date
- Headcount

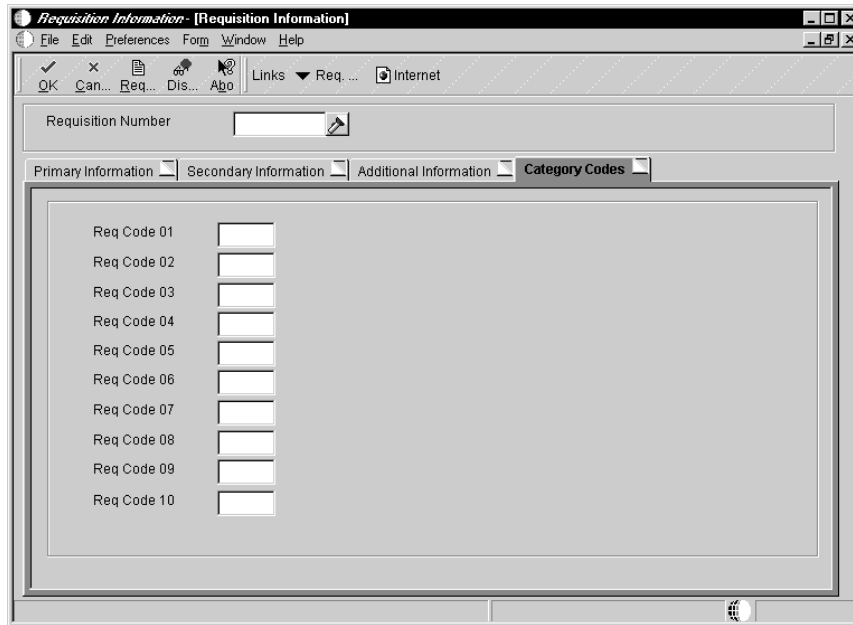
5. Click the Secondary Information tab and complete any of the following fields, as necessary:
- Pay Grade/Step
 - Pay Class(H/S/P)
 - Overtime Exempt
 - Expected Salary
 - FTE
 - Hours
 - Last Filled By
 - Filled Date

The screenshot shows a software window titled "Requisition Information - [Requisition Information]". The window has a menu bar with "File", "Edit", "Preferences", "Form", "Window", and "Help". Below the menu bar is a toolbar with icons for "OK", "Cancel", "Request", "Dismiss", and "Apply", along with a "Links" dropdown menu and an "Internet" icon. The main content area has a tabbed interface with four tabs: "Primary Information", "Secondary Information" (which is selected), "Additional Information", and "Category Codes". The "Secondary Information" tab contains several input fields: "Requisition Number" (a text box with a search icon), "Pay Grade/Step" (two text boxes), "Pay Class(H/S/P)" (a text box), "Overtime Exempt" (a checkbox with "Y" selected), "Expected Salary" (a text box), "FTE" (a text box), "Hours" (a text box), "Last Filled By" (a text box), and "Filled Date" (a text box). The window has standard Windows-style window controls (minimize, maximize, close) in the top right corner.

6. To attach objects to the requisition, click the Additional Information tab.



7. Click the Category Codes tab and complete any of the following fields, as necessary:
 - Req Code 01
 - Req Code 02
 - Req Code 03
 - Req Code 04
 - Req Code 05
 - Req Code 06
 - Req Code 07
 - Req Code 08
 - Req Code 09
 - Req Code 10



8. To complete the requisition, click OK.

If you have enabled Enterprise Workflow Management for requisition approvals and you entered a “waiting for approval” requisition status, a message box appears when you save the requisition.



See *Updating the Status of a Requisition* for information about using the workflow process for approving a requisition.

Field	Explanation
Requisition Number	The number that identifies the requisition. This number must be unique. The system automatically assigns a unique number if you leave this field blank when you enter the requisition.

Field	Explanation
Requisition Status	<p>A code that describes the status of the position associated with the requisition. J.D. Edwards provides several codes that you can use for requisition status purposes. Two of them are hard-coded and should not be changed:</p> <ul style="list-style-type: none"> • Approved (AA) • Filled and Closed (99) <p>You can define requisition status codes in user defined codes table (08/RS). Statuses that indicate that a requisition is approved should begin with the letter "A."</p> <p>For OneWorld: If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the requisition status when the appropriate person approves the requisition. This update overwrites any existing value in the field.</p>
Home Business Unit	The number of the business unit in which the employee generally resides.
Security Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>NOTE: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Requested By	The address book number of the person who enters a position requisition. This field is required.
Requisition Date	The effective date of the requisition. The default value for this field is the system date.
Effective From Date	The date on which a requisition, a position, or activity within a position takes effect.
Effective Thru Date	The date on which a requisition, a position, or an activity within a position is no longer in effect. In position activity, the default value for this field is the end of the current fiscal year so that the system can calculate projected figures.

Field	Explanation
Fiscal Year	<p>A number that identifies the fiscal year. You can enter a number in this field or leave the field blank to indicate the current fiscal year (as defined on the Company Numbers & Names form).</p> <p>Specify the year at the end of the first period rather than the year at the end of the fiscal period. For example, a fiscal year begins October 1, 2005 and ends September 30, 2006. The end of the first period is October 31, 2005. Specify the year 05 rather than 06.</p>
Position ID	<p>A code that you use for budgetary (position) control purposes. The position ID consists of:</p> <ul style="list-style-type: none"> • Position (position code and its description) • Fiscal year • Home business unit <p>For example, you can identify position A0–1 as Accounting Manager for fiscal year 2005–2006, for home business unit 41.</p> <p>You might choose to set up positions so that the position IDs are the same as the corresponding job IDs. Within a home business unit, positions appear in the alphanumeric sequence of their position IDs. For example, position A0-1 appears before position A0-2.</p>
Job Type/Step	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Approved By	<p>The address book number of the person who approves any given work. The system verifies this number against the Address Book.</p> <p>..... <i>Form-specific information</i></p> <p>The address book number of the person who approves a requisition.</p> <p>For OneWorld: If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the approved by field when the appropriate person approves the requisition. This update overwrites any existing value in the field.</p>
Approval Date	<p>The date on which the person with the appropriate authority approves a requisition.</p> <p>For OneWorld: If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the approval date when the appropriate person approves the requisition. This update overwrites any existing value in the field.</p>
Headcount	<p>The number of employees requested, budgeted, or approved for a position or requisition.</p>

Field	Explanation
Pay Grade/Step	<p>A code that designates a category for grouping employees according to pay ranges. For each pay grade, you enter a pay range that includes a minimum, a midpoint, and a maximum pay rate. The system uses these pay ranges to calculate compa-ratios for the employees that you assign to pay grades. After you enter a pay grade for an employee, the system displays either an error or a warning message if you enter a rate for the employee that is not within the pay range for the employee's pay grade.</p> <p>To set up pay grades, use Pay Grades by Class (P082001).</p> <p>If you have set up your system to use rates in the Pay Grade Step table as the default pay rates for employees, changing an employee's pay grade step causes the system to automatically update the following fields:</p> <ul style="list-style-type: none"> • Salary • Hourly Rate • Hours per day • Hours per year • Days per year
Pay Class(H/S/P)	<p>A code that indicates how an employee is paid. Valid codes are:</p> <p>Blank</p> <p>H Hourly</p> <p>S Salaried</p> <p>P Piecework</p>
Overtime Exempt	<p>A code that indicates whether the employee fits the rules of the Fair Labor Standards Act (FLSA) and thus does not have to be paid for working overtime. Valid codes are:</p> <p>Y Yes, the employee fits the rules and does not have to be paid for working overtime.</p> <p>N No, the employee does not fit the rules and is to be paid for working overtime.</p>
Expected Salary	<p>The salary that you expect to pay the individual who fills the requisition.</p>
FTE	<p>The number of full-time equivalents (FTEs) that your organization has budgeted for the position. A full-time equivalent is the portion of a full-time worker that an employee represents within a business unit. For example, an employee who works 20 hours per week represents .50 (one-half) FTE. An employee cannot represent more than 1 FTE.</p>
Hours	<p>The number of hours that are budgeted for a position within a business unit for a period of one year. This is the total number of hours allotted to a position for all the full-time equivalents (FTEs).</p>
Last Filled By	<p>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other address book members.</p>

Field	Explanation
Filled Date	The assignment/hire date for the last person to fill the requisition.
Category Code – Requisition 01	A code defined by the user for reporting on requisitions. Each category code is tied to a particular set of User Defined Codes in the data dictionary.

Processing Options for Requisition Information

Defaults

- 1) Enter a '1' to default Pay Grade, Pay Grade Step, Pay Class and Overtime Exempt from the Job Information Table.

Default = 0

- 2) Enter a '1' to automatically bring up the Additional Requisition Information Form on an add. The default of a '0' will NOT bring up the window automatically on an add.

Default = 0

Exits

Enter the 'Select' button exit of a '1' for Requisition Information (default), or '2' for Requisition Supplemental Data Inquiry.

'Select' button exits

Entering Supplemental Data for Requisitions

From the Requisitions menu (G08BR1), choose Requisition Supplemental Data.

Supplemental data is any type of information in addition to the requisition record that you want to track about the following items or individuals:

- Requisitions
- Jobs
- Employees
- Applicants
- Dependents/Beneficiaries

When you set up your Human Resources system, you specify the types of supplemental data (data types) that you want to track. Supplemental data is not required by the system.

Requisitions might include the following types of supplemental data:

- Requirements
- Approval steps
- Requisition notes
- Requisition activity
- Requisition review

The method that you use to enter supplemental data is the same for any other type of supplemental information that you track.

See Also

- *Working with Supplemental Data* in the *HR and Payroll Foundation Guide* for information about entering, copying, and reviewing supplemental data
- *Reviewing Requisition Reports*

Working with Requisitions

After you enter basic requisition information, you typically need to wait for the appropriate person to approve it before you can begin recruiting candidates. If you have enabled the workflow process for requisition approvals, the system automatically updates the status of a requisition. If you are not using the workflow process, you must update the status manually.

You can attach candidates' records to a requisition to make it easy to track the candidates' progress as you interview them and evaluate their qualifications. When you hire a candidate to fill a requisition, the system automatically updates the filled head count for the requisition. (The filled head count is the number of people who have been hired to fill the requisition.)

When you hire enough candidates to meet the head count for the requisition, the system automatically indicates that the requisition is filled and closed. You cannot hire candidates for a requisition that is filled and closed. If necessary, however, you can reopen a closed requisition by increasing its head count and changing the requisition status.

Working with requisitions includes the following tasks:

- Updating the status of a requisition
- Attaching a candidate record to a requisition
- Reopening a requisition

Updating the Status of a Requisition

Your organization might require that a new requisition be approved by a higher level of management before it can be filled. In this case, when you (the requestor) enter a requisition, you can indicate that it is waiting for approval. When the approving manager approves or rejects the requisition, the requisition status must be updated accordingly.

Typically, you wait until a requisition is approved before you begin searching for candidates to fill the requisition. The system does not allow you to hire a candidate to fill a requisition unless the requisition status is "approved."

The demonstration data for your system includes a workflow process for requisition approvals. You can enable this workflow process when you set up your system. If the workflow process is enabled, the following events happen after you enter a requisition:

- The system automatically notifies the person who is authorized to approve requisitions (the approving manager) that a requisition is waiting for approval.
- When the approving manager approves or rejects a requisition, the system automatically updates the requisition status and the Approved By field if the requisition was approved.

If you have activated this workflow process, you do not need to manually update the requisition status when the requisition is approved or rejected. Instead, the system automatically updates the requisition status for you. If you are not using the workflow process, you or the approving manager must manually update the status of the requisition.

To update the status of a requisition, complete either of the following tasks:

- Updating the status of a requisition using workflow
- Updating the status of a requisition manually

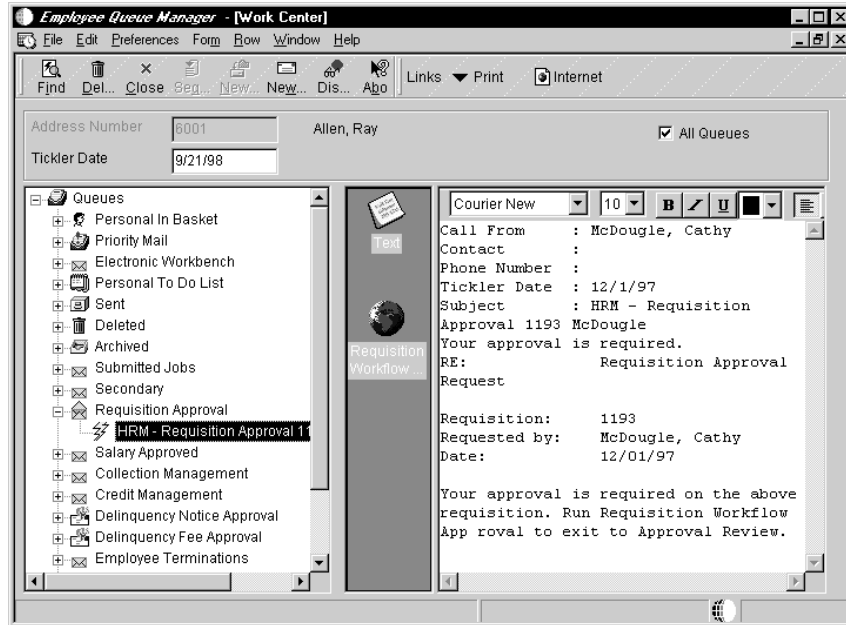
► **To update the status of a requisition using workflow**

From the Workflow Management menu (G02), choose Employee Work Center.

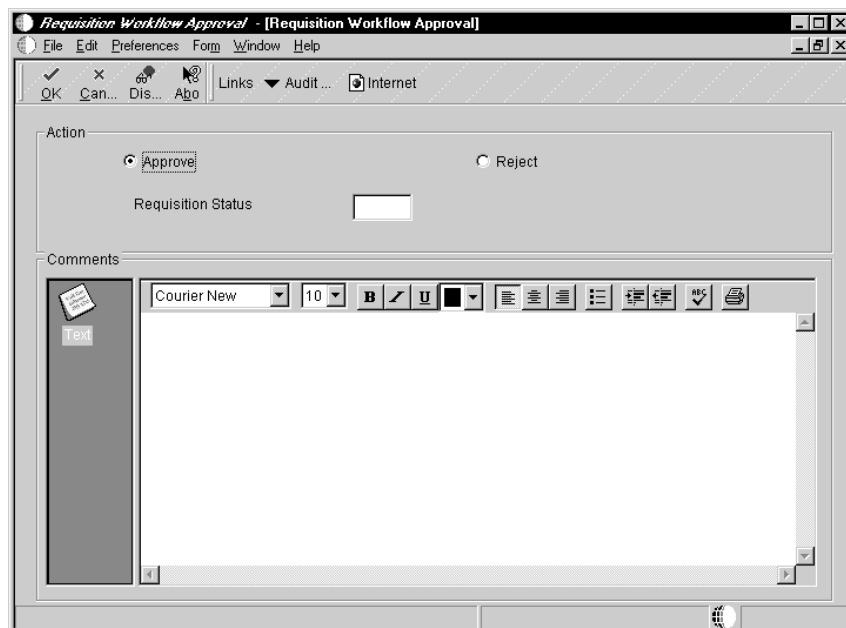
The following steps describe how the approving manager completes the workflow process after the requestor completes the steps for entering requisition information.

The approving manager receives a workflow message saying that there is a requisition waiting for approval. The message containing the requisition appears in the Requisition Approval mailbox in the Work Center.

On Work Center



1. To approve or reject the requisition, choose the message containing the requisition, and then click the Requisition Workflow Approval icon.
2. Click Requisition Workflow Approval on the right side of the form.



3. On Requisition Workflow Approval, click the following field:
 - Approve
4. Complete the following field:
 - Requisition Status

5. Enter an optional text message.

The system stores the message text in an audit table so that you can refer to it later, if necessary.

6. Click OK.

The system updates the requisition with the new status code, adds the name of the person who approved the requisition, and notifies the requestor that the requisition has been evaluated. If the manager approves the requisition, the system also sends a message to the appropriate recruiter.

To update the status of a requisition manually

From the Requisitions menu (G08BR1), choose Requisition Information.

On Work With Requisitions

1. To locate the requisition that you need to approve, complete one or more of the following fields and click Find:
 - Home Business Unit
 - Position ID
 - Requisition Number
 - Requisition Status
 - Job Type
 - Fiscal Year
2. Choose the requisition and click Select.
3. On Requisition Information, complete the following fields, and then click OK:
 - Requisition Status
 - Approved By
 - Approval Date

Field	Explanation
Approved By	<p>The address book number of the person who approves any given work. The system verifies this number against the Address Book.</p> <p>..... <i>Form-specific information</i></p> <p>The address book number of the person who approves a requisition.</p> <p>For OneWorld: If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the approved by field when the appropriate person approves the requisition. This update overwrites any existing value in the field.</p>
Approval Date	<p>The date on which the person with the appropriate authority approves a requisition.</p> <p>For OneWorld: If you are using Enterprise Workflow Management to automate the process of approving requisitions, the system automatically updates the approval date when the appropriate person approves the requisition. This update overwrites any existing value in the field.</p>

Attaching a Candidate Record to a Requisition

When you determine that a candidate might be suitable to fill a vacancy, you can attach the candidate’s record to the requisition. Attaching candidate records to a requisition simplifies the process of tracking each candidate’s status as you interview and evaluate candidates for the vacancy.

After you attach candidate records to a requisition, you can easily review the status of all of the candidates who are being considered for a requisition. You can limit your review to include only applicants or only employees. For applicants, you can further limit the search to include only those with a specific applicant status, such as applicants who have passed the tests required for employment with your organization.

You can also update the candidate’s requisition status as necessary. For example, when you decide that a candidate is not suitable for the vacancy, you can reject the candidate.

When you are ready to fill a requisition, you hire an applicant or assign an employee to the requisition. The system automatically changes the candidate’s status to indicate that the candidate filled the requisition.

To attach a candidate record to a requisition

From the Requisitions menu (G08BR1), choose Requisition Information.

On Work With Requisitions

1. To locate the requisition to which you need to attach a candidate record, complete one or more of the following fields and click Find:
 - Home Business Unit
 - Position ID
 - Requisition Number
 - Requisition Status
 - Job Type
 - Job Step
 - Fiscal Year
2. Highlight the requisition and click Select.
3. On Requisition Information, choose Requisition Activity from the Form menu.

The screenshot shows a software window titled "Requisition Information - [Requisition Activity]". It features a menu bar (File, Edit, Preferences, Row, Window, Help) and a toolbar with icons for OK, Find, Del..., Can..., New..., Dis..., and Algo. Below the toolbar are several input fields and controls:

- Requisition Number: 1126
- Address Number: (empty)
- Search Type: *
- Applicant Status: *
- Candidate Req Status: All, Filled, Candidate, Rejected
- Requisition Status: AA
- Headcount: 1
- Filled Headcount: 0
- Home Business Unit: Corporate Administration
- Fiscal Year: 5
- Position ID: DA-3
- Job Type: DA-3
- Job Step: (empty)
- Requested By: 6001 Allen, Ray

At the bottom, there is a table with the following data:

Req No.	Sch Typ	Address Number	Alpha Name	Candidate Req. Status	Description
1126	E	7506	Mayeda, Donald	CAN	Candidate

4. On Requisition Activity, complete the following field:
 - Address Number
5. Complete the following fields in the detail area of the form, and click OK:
 - Candidate Req Status
 - Requisition Status Date
 - Date Avail.

Field	Explanation
Candidate Req Status	<p>The current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from user defined code table 08/CN.</p> <p>You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are:</p> <ul style="list-style-type: none"> CAN Any candidate code DET Any code indicating that the position is detached or no longer filled FIL Any code indicating that the position has been filled REJ Rejected TMP Temporarily filled <p>Candidate requisition status codes that have special handling codes of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to “Filled and Closed.”</p>
Requisition Status Date	The date that the current status of a candidate requisition becomes active.
Date Avail.	The date an applicant is available to begin work.

Reopening a Requisition

In some cases, you might need to reopen a requisition that has been filled and closed. For example, assume that you receive the necessary funding to increase the head count for a position that had previously reached its maximum filled head count. If you have a filled and closed requisition that references the position, you can save time by reopening the existing requisition instead of creating a new one.

To reopen a requisition

From the Requisitions menu (G08BR1), choose Requisition Information.

On Work With Requisitions

1. To locate the requisition that you need to reopen, complete one or more of the following fields and click Find:
 - Home Business Unit
 - Position ID
 - Requisition Number
 - Requisition Status
 - Job Type

- Job Step
 - Fiscal Year
2. Choose the requisition and click Select.
 3. On Requisition Information, change the information in the following field:
 - Requisition Status
 4. Complete the following field and click OK:
 - Headcount

Field	Explanation
Headcount	The number of employees requested, budgeted, or approved for a position or requisition.

Reviewing Requisition Reports

After you enter requisition information, you can print reports to review the information and verify that it is correct. You can also review information about groups of requisitions, such as their approval status, their filled status, and the candidate records that are attached to them.

Reviewing requisition reports includes the following tasks:

- Reviewing the Requisition Supplemental Data report
- Reviewing the Requisition Data by Data Type report
- Reviewing the Requisition Review – Position report

Reviewing the Requisition Supplemental Data Report

From the Requisition Supplemental Data menu (G08BSDR1), choose Requisition Supplemental Data Report.

To review complete information for one or more requisitions, print the Requisition Supplemental Data report. You can review this information online for a single requisition using Requisition Supplemental Data Inquiry. However, this report allows you to print information for multiple requisitions at one time.

You can list requisitions either by requisition number or alphabetically by requisition description. You also choose whether the report includes text information.

See Also

- R080416, *Requisition Supplemental Data* in the *Reports Guide* for a report sample

Processing Options for Requisition Supplemental Data Report

Printing Text

1) Enter a '1' to bypass printing text information on the report. Default of blank will print the text.

Reviewing the Requisition Data by Data Type Report

From the Requisition Supplemental Data menu (G08BSDR1), choose Requisition Data by Data Type Report.

To review a list of all requisitions with information in a particular supplemental data type, print the Requisitions by Data Type report. You can review this same information online using Requisition Data by Data Type.

See Also

- R080406, *Requisition Data by Data Type* in the *Report Guide* for a report sample

Processing Options for Requisition Data by Data Type Report

Options

Enter a '1' to bypass printing text information on the report.

Default of blank will print the text. _____

Reviewing the Requisition Review – Position Report

From the Requisitions menu (G08BR1), choose Requisition Review – Position.

To determine the approval status of a group of requisitions, print the Requisition Review – Position report. You can print two versions of this report. One lists the requisitions by job description and the other lists them by position description.

See Also

- R081490, *Requisition Review - Position* in the *Reports Guide* for a report sample

Processing Options for Requisition Review – Position Report

Detail Type

1. Which field would you like to see on the report. Blank (default) = Position Description, 1 = Job Description. _____

Applicant Information



Applicant Information

An applicant is a person who applies for a vacancy in your organization. You can track detailed information about applicants and use this information to do the following things:

- Link applicants to requisitions
- Evaluate the qualifications of each applicant
- Meet government reporting requirements

You might track the following standard types of applicant information:

- Personal information, such as name, address, and tax identification number
- The job and position for which each applicant applies
- Governmental reporting information, such as that required to meet Equal Employment Opportunity (EEO) and Canadian Employment Equity requirements

The system also gives you the flexibility to track any other type of information that your organization needs. You can use the supplemental data feature to track entire categories of auxiliary information for applicants, such as job skills or professional licenses.

Working with applicant information includes the following tasks:

- Entering applicant information
- Hiring an applicant
- Reviewing applicant reports



Entering Applicant Information

Before you can begin evaluating applicant information, you must add to the database a record that contains personal information about the applicant.

You can track detailed information about applicants so that you can evaluate applicants' qualifications and match applicants to open requisitions. You can also track the applicant information that you need to meet government reporting requirements.

After you enter initial information for an applicant, you can enter supplemental data, which is any additional information that you want to use to help link the applicant to a job.

Entering applicant information includes the following tasks:

- Adding new applicant records
- Updating an applicant's address
- Entering supplemental data for applicants

When you are finished adding new applicant records, the system can update one of the following tables:

- Unedited Quick Hire Transaction table (F060116Z)
- Employee Master table (F060116)

If you click the Initiate Hire option after you add an applicant record, the system updates the Unedited Quick Hire Transaction table (F060116Z). This table is part of the Employee Quick Hire program (P060116Q). The applicant record does not become an employee record in the Employee Master table until you run the Process Pending Employees report (R060116P). This report copies the applicant record from the Unedited Quick Hire Transaction table to the Employee Master table (F060116) and changes the search type from applicant to employee.

The Unedited Quick Hire Transaction table (F060116Z) does not automatically update the Employee Master table, so you cannot review and revise the applicant records before they are copied to the Employee Master table (F060116). You can review and revise applicant records with the Employee Work File Revisions program (P060116P), and then run the Process Pending Employees report (R060116P) to update the Employee Master table (F060116).

If you click the Hire option after you add an applicant record, the system updates the Employee Master table (F060116) and changes the search type on the record from applicant to employee.

See Also

- *Attaching a Candidate Record to a Requisition* for information about associating applicants with requisitions
- *Working with New Employee Information* in the *HR and Payroll Foundation Guide* for information about updating the Employee Master table

Adding New Applicant Records

Before you can track applicant information or search for an applicant who has a specific skill, you must add a record for the applicant. This record includes the following personal information about the applicant:

- Job applied for
- Country code
- Date available to work

Adding new applicant records includes the following tasks:

- Entering basic applicant information
- Entering address book information for an applicant
- Entering country-specific information for an applicant

Basic information includes information about the applicant, such as the job for which the applicant is applying.

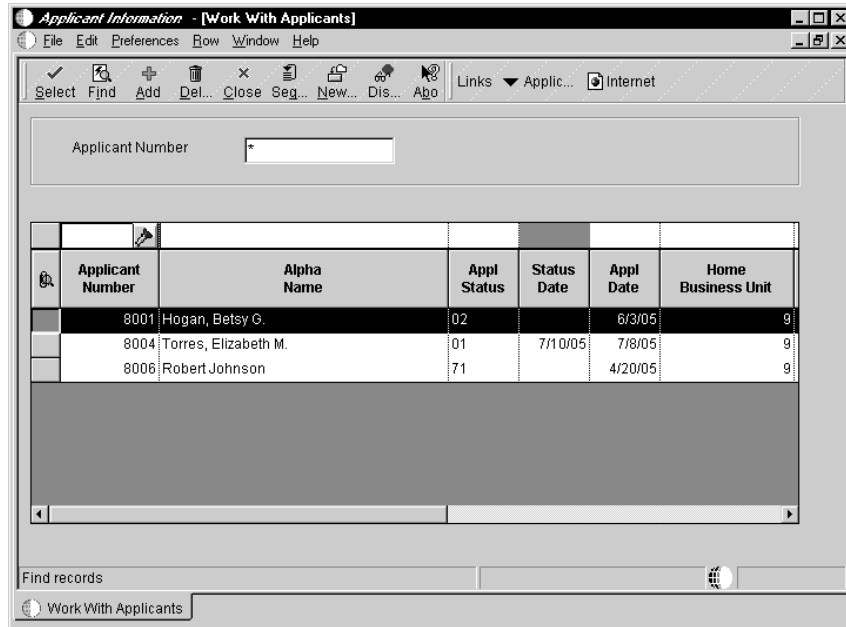
Address book information includes information such as the applicant's name, address, and phone number. Entering address book information automatically adds the applicant to the Address Book system. After you enter address book information for an applicant, you can locate the applicant's record in the database by name. You do not need to know the applicant number.

Country-specific information is information that is required only in the country in which the applicant works. For example, in the United States, country-specific information includes information that is required for government reporting, such as veteran and disability status.

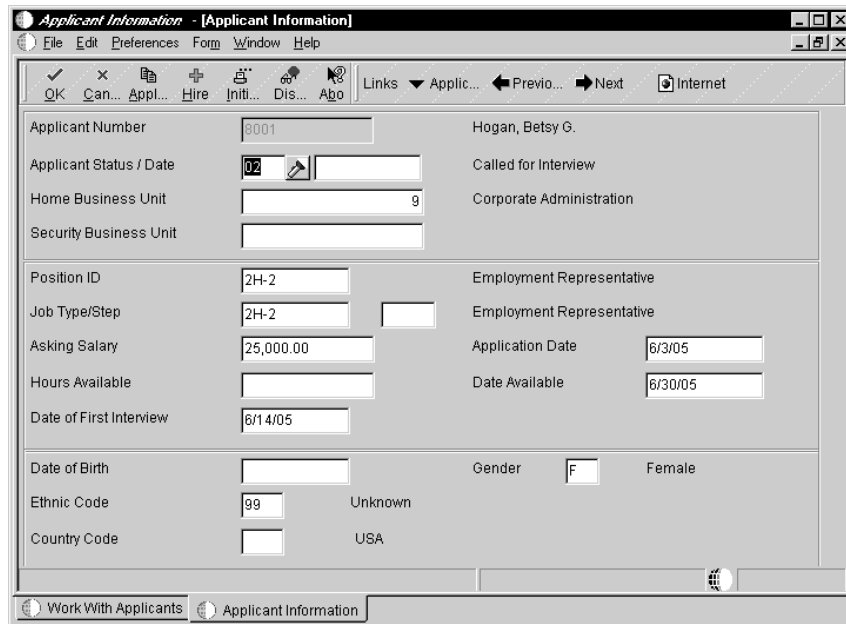
► To enter basic applicant information

From the Applicants menu (G08BA1), choose Applicant Information.

On Work With Applicants



1. Click Add.

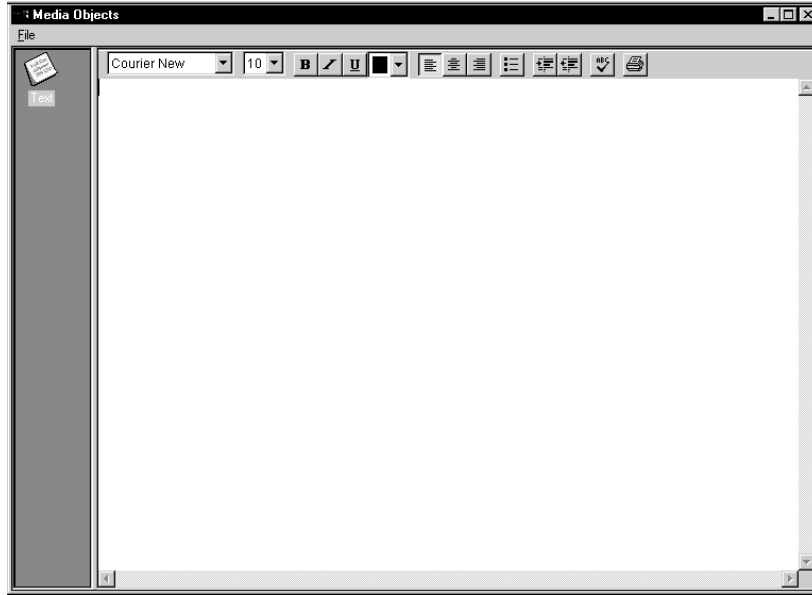


2. On Applicant Information, complete the following fields:

- Applicant Number
 - Applicant Status / Date
 - Application Date
 - Gender
 - Ethnic Code
 - Country Code
3. To associate the applicant's record with a specific job, complete the following fields:
 - Home Business Unit
 - Job Type/Step
 4. Complete any of the following optional fields and click OK:
 - Security Business Unit
 - Position ID
 - Date Available
 - Date of First Interview
 - Asking Salary
 - Hours Available
 - Date of Birth

When you enter applicant information, you can use the attachment feature to attach additional text or objects, such as a scanned copy of the applicant's resume, to the applicant record.

5. From the Form menu, choose Attachments to add text or objects to applicant information.



6. On Media Objects, choose Add then Text, from the File menu.
7. Add text or objects to applicant information, and choose Save & Exit from the File menu.

For information about entering attachments, see *Working with Media Objects* in the *OneWorld Foundation Guide*.

After you complete these steps, follow the steps to enter address book information for an applicant.



Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Applicant Number	<p>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.</p> <p>..... <i>Form-specific information</i></p> <p>This number becomes the applicant's employee number if the applicant is hired. You can either enter this number or you can leave the field blank and the system automatically assigns the next available number. Each applicant number must be unique. If you enter a number that already exists, the system displays an error message.</p>

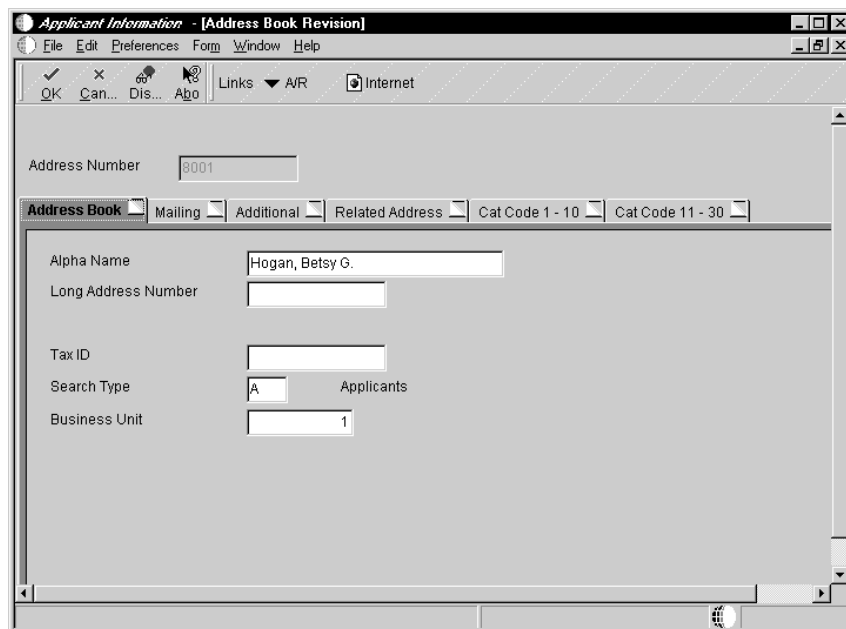
Field	Explanation
Applicant Status / Date	<p>A code that defines a step in the hiring process (such as initial contact, first interview, and so on) that the applicant has completed. You define these codes in user defined code table 08/AS.</p> <p>When you enter or change the status of an applicant on the Applicant Entry form, the system adds a record to the supplemental data type for applicant status. To review the history of an applicant's status, you can review the information that was entered for the applicant in this supplemental data type.</p>
Ethnic Code	<p>A user defined code (07/M) that designates minority classifications according to U.S. Equal Employment Opportunity Commission (EEOC) and Canadian Employment Equity Occupational Group (EEOG) standards. The predefined codes that J.D. Edwards provides are hard-coded. The system uses these codes to generate EEO reports and to compile Canadian Employment Equity information. Do not change these predefined codes. You can add codes, if necessary.</p>
Gender	<p>Valid codes are:</p> <p style="padding-left: 40px;">M – Male</p> <p style="padding-left: 40px;">F – Female</p>
Country Code	<p>A user defined code 00/CN that indicates the country in which the employee resides.</p>
Home Business Unit	<p>The number of the business unit in which the employee generally resides.</p>
Job Type/Step	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Security Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>

Field	Explanation
Position ID	<p>A code that you use for budgetary (position) control purposes. The position ID consists of:</p> <ul style="list-style-type: none"> • Position (position code and its description) • Fiscal year • Home business unit <p>For example, you can identify position A0-1 as Accounting Manager for fiscal year 2005-2006, for home business unit 41.</p> <p>You might choose to set up positions so that the position IDs are the same as the corresponding job IDs. Within a home business unit, positions appear in the alphanumeric sequence of their position IDs. For example, position A0-1 appears before position A0-2.</p>

► **To enter address book information for an applicant**

After you complete the steps to enter basic applicant information the Address Book Revision form appears. You must complete the following steps to enter address book information.

On Address Book Revision



1. Click the Address Book tab.
2. Complete the following field:
 - Alpha Name
3. Complete the following optional fields:

- Long Number
 - Tax ID
4. Complete the following fields, if necessary:
 - Search Type
 - Business Unit
 5. Click the Mailing tab.
 6. Complete the following fields:
 - Mailing Name
 - Address Line 1
 - City
 - State
 - Postal Code
 - Country
 - County
 7. Complete the following fields, if necessary:
 - Address Line 2
 - Address Line 3
 - Address Line 4
 8. Click OK.

After you complete these steps, follow the steps to enter country-specific information for an applicant.

Field	Explanation
Long Number	A user defined name or number that is unique to the address book number. You can use this field to enter and locate information. You can use it to cross-reference the supplier to a Dun & Bradstreet number, a lease number, or other reference.
Tax ID	The identification code required by various tax authorities. This can be a social security number, federal or state corporate tax ID, sales tax number, and so on. Do not enter separator characters. The system verifies the number and prints the separators in their correct format, according to the value of TAXC (Person/Corporation Code). If there is no value for TAXC, the system uses the Corporate Entity. Attention Accounts Payable users: The supplier master record supplies the default value for the tax ID for 1099 processing.

Field	Explanation
Search Type	<p>A user defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example:</p> <p>E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists T Tax authority</p>
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p> <p>..... <i>Form-specific information</i></p> <p>If left blank, this field defaults to a value of '1'.</p>

► To enter country-specific information for an applicant

After you complete the steps to enter address book information for an applicant, you must enter country-specific information. When you enter country-specific information, the system displays fields only for the information that applies to the country code that you entered for the applicant. Many of the fields that appear on the National Data forms are user defined fields that you can customize to meet the specific needs of your organization. The following steps apply to an applicant in the United States.

On Work With Applicants

1. Locate the applicant's record and click Select.
2. On Applicant Information, choose Applicant National from the Form menu.

3. On Applicant Information – National Data – Revisions, complete the following fields to enter government reporting information:
 - EEO Job Cat
 - Veteran
 - Disability
 - Disabled Veteran
4. To enter user-defined information, complete any of the following fields:
 - Applicant Code 5
 - Applicant Code 6
 - Applicant Code 7
 - Applicant Code 8
 - Applicant Code 9
 - Applicant Code 10
5. Complete any of the following optional fields:
 - Travel (Y/N)
 - Relocate (Y/N)
 - Reg/Temp (R/T)
 - Source of Reference
 - Application Method
 - Interviewer

- Branch/Location
6. Click Initiate Hire to update the Unedited Quick Hire Transaction table (F060116Z), or click Hire to update the Employee Master table (F060116).

If you click Initiate Hire, follow the steps for revising the applicant records and updating them to the Employee Master and Address Book tables. See *Working With New Employee Information* in the *HR and Payroll Foundation Guide*.



Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
EEO Job Cat	A user defined code (07/J) that specifies classifications established by the U.S. Equal Employment Opportunity Commission (EEOC) or the Canadian Employment Equity Occupational Group (EEOG) for use in reporting levels of minority employment. Do not change any of the codes provided by J.D. Edwards. You can add codes if needed.
Veteran	A code that indicates the veteran status of the employee. Valid codes are: N No, this employee is not a veteran. Y Yes, this employee is a veteran. V This employee is a Vietnam veteran.
Disability	A code indicating whether this employee has a mental or physical disability. Valid codes are: Y Yes, this employee has a mental or physical disability. N No, this employee does not have a mental or physical disability. U Unknown
Disabled Veteran	A code indicating whether this employee is a disabled veteran. Valid codes are: Y Yes, this employee is a disabled veteran. N No, this employee is not a disabled veteran. This field is used to generate the Veterans Employee (VETS-100) report.
Applicant Code 5	A user defined code available for you to use as necessary to define applicant information.
Travel (Y/N)	A yes/no (Y/N) code you can use to meet your needs. Currently this code has been defined to indicate whether an applicant is willing to travel. Valid codes are: Y Yes, this applicant will travel N No, this applicant is not willing to travel

Field	Explanation
Relocate (Y/N)	A yes/no (Y/N) code you can use to meet your needs. Currently it has been defined to indicate whether an applicant is willing to relocate. Valid codes are: Y Yes, the applicant will relocate N No, the applicant is not willing to relocate
Reg/Temp (R/T)	A code used to indicate whether the applicant is to be a regular or a temporary employee. Valid codes are: R The applicant is to be a regular employee T The applicant is to be a temporary employee
Source of Reference	A code explaining how an applicant was referred to the position or to the company. You can define these codes using user defined code table 08/N1. This code reflects a more specific source of information than that in the Application Method (data item HN02) field.
Application Method	A code used to define how an applicant applied for the job. You can define these codes using user defined code table 08/MA. This code reflects a less specific source of information than that in the Source of Information (data item HN01) field.
Interviewer	A code used to identify the person who interviewed the applicant. You can define interviewers using user defined code table 08/N3. You can enter more specific interview information using the data types linked to the detailed applicant resume process.
Branch/Location	A code used to define the branch or geographic location for which the applicant is being considered. You can define this code using user defined code table 01/01. This code is helpful for reporting purposes.

Processing Options: Applicant Entry

Hire Tab

For information about a processing option, right-click the processing option field and choose What's This from the menu. Or click the processing option field and press F1.

These processing options allow you to transfer specific applicant information to the Employee Master table (F060116) or the Unedited Quick Hire Transaction table (F060116Z) after you add an applicant record.

1) Status Code for Hired Applicant

Use this processing option to enter the user defined code (08/AS) that your organization uses to indicate that an applicant is hired. When you complete the steps to hire an

applicant, the system automatically updates the applicant's status with the code that you enter in this processing option.

2) Default Requisition Information

Use this processing option to define whether you want the system to automatically transfer information that you entered for the requisition, including the position ID, home business unit, job type, job step, and security business unit, to the applicant's record when you enter an applicant. When you hire an applicant, the system transfers this information to the applicant's employee record. Valid values are:

1 Yes. Transfer requisition information to the applicant and employee records.

Blank No. Do not transfer requisition information.

If you enter 1 for this processing option, you must enter a requisition number for each applicant when you enter the applicant record.

3) Default Job Information

Use this processing option to define whether you want the system to automatically transfer information that you entered for the job to the employee record when you hire an applicant. The system does not transfer this job information to the applicant record. Valid values are:

1 Yes. Transfer job information to employee records.

Blank No. Do not transfer job information.

If you enter 1 for this processing option, you must enter a job type for each applicant when you enter the applicant record. If your organization uses job steps, you must also enter a job step for each applicant.

4) Transfer Supplemental Data

Use this processing option to define whether you want the system to automatically transfer applicant supplemental data to the employee supplemental database when you hire an applicant. The system transfers the information that you entered in the applicant supplemental data types to the equivalent supplemental data types for employees. Valid values are:

1 Yes. Transfer supplemental data for applicants.

Blank No. Do not transfer supplemental data for applicants.

5) Notification Message

Enter the address book number of the person that you want to notify when you choose Initiate Hire to hire an applicant. Typically, the person that you notify is the person who is responsible for entering employee information for new employees.

Delete Tab

For information about a processing option, right-click the processing option field and choose What's This from the menu. Or click the processing option field and press F1.

This processing option allows you to automatically delete certain information.

1) Supplemental Data

Use this processing option to define whether you want the system to automatically delete the supplemental data that you entered for an applicant when you delete the applicant's record. Valid values are:

- 1 Yes. Delete supplemental data for applicants.
- Blank No. Do not delete supplemental data for applicants.

Exits Tab

For information about a processing option, right-click the processing option field and choose What's This from the menu. Or click the processing option field and press F1.

This processing option allows you to define which forms appear when you click Select from the Work with Applicant Information form.

1) 'Select' Button Exits

Use this processing option to define which form you want to appear when you click Select from the Work with Applicant Information form. Valid values are:

- 1 Applicant Information.
- 2 Applicant Supplemental Data Inquiry.

Updating an Applicant's Address

After you have entered applicant information, you can use Address Book Revisions to change an applicant's address.

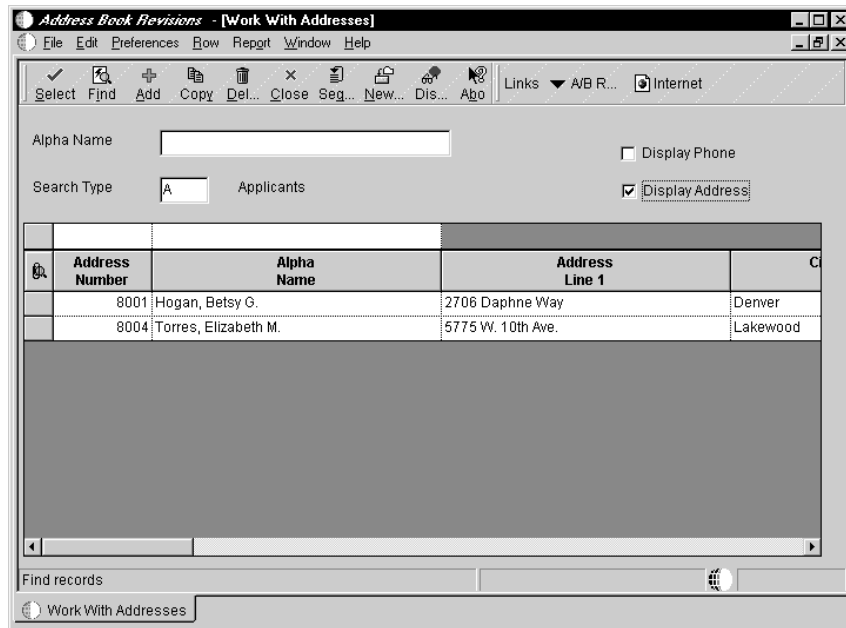
See Also

- *Entering Basic Address Book Information* in the *Address Book Guide*

To update an applicant's address

From the Applicants menu (G08BA1), choose Address Book Revisions.

On Work With Addresses



1. Complete either of the following fields to locate the address you need to change:
 - Alpha Name
 - Search Type
2. To display the applicant’s phone or address, click the Display Phone or Display Address option.
3. Click Find.
4. Choose the employee address you want to change and click Select.
5. On Address Book Revision, complete any of the necessary fields and click OK.

Field	Explanation
Alpha Name	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

Field	Explanation
Search Type	A user defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists T Tax authority

Processing Options for Address Book Revisions

Entry

1. Enter a '1' to automatically display the following forms on an ADD.

Supplier Master, if the Payable field on the Additional Information tab is 'Y'. _____
Customer Master, if the Receivable field on the Additional Information tab is 'Y'. _____
CSMS, if the CSFL flag is turned on in F17001. _____

2. Enter a '1' to suppress the Tax ID field. If left blank, Tax ID will appear on the form. Use of this processing option not recommended for Search Type 'E', since Tax ID is a REQUIRED field for this Search Type.

Tax ID _____

Defaults

3. Enter the default search Type that should appear upon entry into Work With Addresses.

Search Type _____

Version

Please use the Version of the Master Business Function to be used for the application. If left blank, ZJDE0001 version will be used _____

Entering Supplemental Data for Applicants

From the Applicants menu (G08BA1), choose Applicant Supplemental Data.

Supplemental data is any type of information in addition to an applicant record that you want to track about the following items or individuals:

- Requisitions
- Applicants
- Employees
- Jobs
- Dependents
- Beneficiaries

When you set up your Human Resources system, you specify the types of supplemental data (data types) that you want to track. Supplemental data is not required by the system.

You might include the following types of supplemental data for applicants:

- Applicant status history
- Work experience
- Education
- Job skills
- References

The method that you use to enter supplemental data is the same for any other type of supplemental information that you track.

See Also

- *Working with Supplemental Data* in the *HR and Payroll Foundation Guide* for information about entering, copying, and reviewing supplemental data
- *Reviewing Applicant Reports*

Hiring an Applicant

When you offer an applicant a job and the applicant accepts, you need to indicate that the applicant is hired. When you are ready to hire an applicant, you can either complete the employee record yourself or send a message to the person in your organization who is responsible for creating new employee records in the database.

When the person who hires applicants is typically the same person who creates new employee records, you can save time and eliminate redundant data entry by setting up your system to automatically copy applicant information to the employee database when you hire an applicant. You can copy both initial applicant information, such as name, address, and position information, and applicant supplemental data.

Because you typically need to retain applicant records for government reporting requirements, copying applicant information to the employee database does not delete the information from the applicant database.

When you hire an applicant, you can enter additional employee information. To ensure that you enter the information that is required to process the employee through a payroll cycle, you can use a processing option to require someone to enter that information before the hiring process is complete.

After you hire an applicant, the system automatically updates the person's Address Book record to indicate that he or she is an employee.

You can hire a high volume of new employees efficiently using Quick Hire. See *Adding Employee Records for Applicants, Rehires, and New Hires* in the *HR and Payroll Foundation Guide*.

Before You Begin

- Set up your system to transfer selected types of supplemental data when you hire an applicant. See *Setting Up Cross-Reference Tables for Supplemental Data* in the *HR and Payroll Foundation Guide*.
- Review the processing options for this program and for Employee Information. To transfer supplemental data for applicants to the employee supplemental database, you must set up the appropriate processing options.
- Verify that the applicant status is set up on Define Types of Data. See *Defining Types of Supplemental Data* in the *HR and Payroll Foundation Guide*.

► To hire an applicant

From the Applicants menu (G08BA1), choose Applicant Information.

On Work With Applicants

1. Locate the applicant.
2. Choose the applicant's record, and then click Select.
3. On Applicant Information, do one of the following:
 - Click the Hire button to hire the applicant and enter complete employee information for the applicant.
 - Click the Initiate Hire button to hire the applicant and to send an e-mail message to the person who needs to enter complete employee information for the applicant.

Applicant Information - [Hire Applicant]

File Edit Preferences Form Window Help

OK Can... Dis... Ab... Links ▼ Reqs ... Internet

Applicant Number 8001 Hogan, Betsy G.

Date Started 9/21/98

Requisition No. to be filled 1265

Candidate Requisition Status EF Externally Filled

4. On Hire Applicant, complete the following fields and click OK:
 - Date Started
 - Requisition No. to be filled
 - Candidate Requisition Status
5. Click OK to either hire the applicant or send notification to the person who will complete the hiring process.

If you clicked the Hire button to hire the applicant, the Employee form appears.

6. On Employee, complete the remaining steps to add a new employee record.

See *Adding Employee Records One at a Time* in the *HR and Payroll Foundation Guide*.

Field	Explanation
Date Started	<p>The date on which the employee actually reported to work for the most recent period of hire. When an employee initially begins working, the default is the original hire date. If no original hire date exists, the system uses the current date. This field can be updated multiple times if, for example, an employee is a seasonal worker.</p> <p>For the calculation tables in the Payroll system and the eligibility tables and date codes in the Human Resources system, the system also uses this date as a start date when it calculates deductions, benefits, and accruals.</p>
Requisition No. to be filled	<p>The number that identifies the requisition. This number must be unique. The system automatically assigns a unique number if you leave this field blank when you enter the requisition.</p>
Candidate Requisition Status	<p>The current activity level of a candidate record that is attached to a requisition. The system retrieves these codes from user defined code table 08/CN.</p> <p>You can group candidate requisition status codes based on the hard-coded special handling code values in the table. These hard-coded values are:</p> <ul style="list-style-type: none"> CAN Any candidate code DET Any code indicating that the position is detached or no longer filled FIL Any code indicating that the position has been filled REJ Rejected TMP Temporarily filled <p>Candidate requisition status codes that have special handling codes of either FIL or TMP update the Filled Headcount field. However, only those status codes that have special handling codes of FIL can cause the system to change the requisition status to “Filled and Closed.”</p>

Reviewing Applicant Reports

To review detailed information about applicants, you can print applicant reports. These reports make it easy to do the following things:

- Search for applicants who have specific skills
- Satisfy government reporting requirements
- Evaluate the hiring practices of your organization

Reviewing applicant reports includes the following tasks:

- Reviewing the Applicant List report
- Reviewing the Applicant Listing by Position report
- Reviewing the Applicant Listing – Job Type/Step report
- Reviewing the Applicant Listing – EEO Listing report
- Reviewing the Applicant Supplemental Data report
- Reviewing the Applicant Data by Data Type report

To review a summary of applicant information, as well as detailed supplemental information for each applicant, you can print applicant listing and applicant supplemental data reports. You can review applicant supplemental information by individual employee or by data type.

To satisfy the requirements of the Equal Employment Opportunity Commission (EEOC), you can print the Applicant Listing – EEO Listing report. You use this report to show that your organization provides equal opportunities for all of the applicants who apply to your organization. Managers within your organization can also use these reports to analyze hiring and promotion practices within your organization.

See Also

- *Working with Supplemental Data* in the *HR and Payroll Foundation Guide* for information about reviewing supplemental data online
- *Working with Multiskill Search* in the *HR and Payroll Foundation Guide* for information about locating applicants who meet multiple criteria

Reviewing the Applicant List Report

From the Applicants menu (G08BA1), choose Applicant List.

To review detailed applicant information, print the Applicant List report. You can use this report to list all applicants or just specific applicants, such as those who have reached a certain point in the hiring process. This report lists detailed information, such as the applicant's available date and asking salary.

See Also

- R084480, *Applicant List* in the *Reports Guide* for a report sample

Reviewing the Applicant Listing by Position Report

From the Applicants menu (G08BA1), choose Applicant Listing by Position.

To review a list of all applicants who have applied for a specific position, print the Applicant Listing by Position report.

See Also

- R084481, *Listing by Position* in the *Reports Guide* for a report sample

Reviewing the Applicant Listing – Job Type/Step Report

From the Applicants menu (G08BA1), choose Applicant Listing – Job Type/Step.

To review a list of all applicants arranged according to their job type and step, print the Applicant Listing – Job Type/Step report. This report includes the number of applicants in each job type and step along with the status of each applicant.

See Also

- R084482, *Applicant Listing - Job Type/Step* in the *Reports Guide* for a report sample

Reviewing the Applicant Listing – EEO Listing Report

From the Applicants menu (G08BA1), choose Applicant Listing – EEO Listing.

To analyze the number of female, minority, veteran, or disabled applicants that have applied to your organization, print the Applicant Listing – EEO Listing report. You can also use this report for Affirmative Action reporting purposes.

You can review applicants by job categories and ethnic codes. The report shows which applicants were hired, as well as the total number who applied from each of the EEO categories.

See Also

- R084483, *Applicant Listing - EEO Listing* in the *Reports Guide* for a report sample

Processing Options for Applicant Listing – EEO Listing

Date of Birth

Enter '1' to hide Date of Birth,
default of blank will show Date of
Birth.

Reviewing the Applicant Supplemental Data Report

From the Applicant Supplemental Data menu (G08BSDA1), choose Applicant Supplemental Data Report.

To review complete supplemental information for one or more applicants, print the Applicant Supplemental Data report. This report compiles all of an applicant's supplemental information into an easy-to-read, resume-style format.

The information that prints on this report is the same information that you can review online using Applicant Supplemental Data Inquiry. However, the report allows you to print information for multiple applicants at the same time.

See Also

- R080411, *Applicant Supplemental Data* in the *Reports Guide* for a report sample

Processing Options for Applicant Supplemental Data Report

Cover Page

Print Cover Page (Y/N)
Print Instructions (Y/N)

Form Options

Form Type
Max Form Width
Max Form Length
Location of Page Overflow

Printer Option

Print Queue _____
Hide in Print Queue (Y/N/S/T) _____
Lines/Inch _____
Char./Inch _____
Number of Report Copies _____

Processing

Enter a '1' if you wish to bypass printing the Tax ID. (Default of blank will print the number.) _____
Enter a '1' if you wish to bypass printing the Asking Salary. (Default of blank will print the number.) _____
Enter a '1' if you wish to bypass printing any extended narrative associated with the data. _____

Reviewing the Applicant Data by Data Type Report

From the Applicant Supplemental Data menu (G08BSDA1), choose Applicant Data by Data Type Report.

To review a list of all applicants who have information entered in a particular supplemental data type, you can print the Applicants by Data Type report. For example, you can review applicants whose supplemental data includes job skills information. The information that prints on this report is the same information that you can review online using Applicant Data by Data Type.

You can review information either by data type or by applicant. For each applicant, the system lists data types in alphabetical order.

See Also

- R080401, *Applicant Data by Data Type* in the *Reports Guide* for a report sample

Processing Options for Applicant Data by Data Type Report

Narrative

1. Enter a '1' to bypass printing text information on the report. Default of blank will print the text. _____

Position Control



Position Control

A position is an employee's assignment for a fiscal year. You use positions to budget for employee salaries. Positions and their budgets are also called position budgets.

Position control is the process of creating, maintaining, and monitoring position budgets. You do not need to create positions to use your Human Resources and Payroll systems. However, to use positions, you must have a position budget.

You define a position budget to establish, monitor, and control budgets for employee assignments. In the same way that a project manager allocates time and material resources to a project, your organization can create position budgets for its employee resources.

You define position accounts so that your accounting department can track the salary amounts budgeted for each position. The way in which you define position accounts depends on which department within your organization is responsible for determining the amounts that are available to budget for positions.

To enable your accounting department to track the salary amounts budgeted for positions, you must define position accounts. You define position accounts either in the Human Resources system or the General Accounting system, depending on which department within your organization is responsible for determining salary amounts for position budgets.

You can attach employee records to a position budget and then review position budget information to ensure that the salary, hours, and full-time equivalent (FTE) for your employees compare favorably to those that you budgeted for the position.

You can revise position budget information when a position budget changes or when you need to correct a data entry error.

To illustrate the reporting relationships among the positions in your organization, you can create parent/child relationships by position. Documenting parent/child relationships can help you determine whether you need to create additional positions or reduce the number of positions in your organization.

Working with position control includes the following tasks:

- Defining position budgets
- Entering account information for positions
- Setting up AAIs for position budgets



- Transferring position budgets to the General Ledger
- Revising position budgets by business unit
- Working with position activity information
- Reviewing position budget information
- Defining next year's position budget
- Working with parent/child relationships by position
- Purging position information
- Reviewing position control reports

Defining Position Budgets

You define position budgets to establish, monitor, and control budgets for employee assignments. In the same way that a project manager allocates time and material resources for a special project, your organization can create position budgets for its employee resources. For each position, your organization can plan for and manage the following types of components:

- Salary expenditures
- Hours worked
- FTEs
- Head count (number of employees)

When you define a position budget, the system updates the Position Master Information table (F08101).

You can define your position budgets manually, or you can let the system automatically define them for you, based on the job and employee information that you have already entered into the system.

Defining a position budget consists of the following tasks:

- Defining position budgets manually
- Defining position budgets automatically

When defining a position budget, you complete the following steps:

- Identify the need for one or more employees
- Approve the need for the employees
- Set up a budget for the employee salary and hours worked
- Assign the appropriate FTEs and head count to the position
- Monitor hiring to ensure that you do not exceed the position budget

For each fiscal year, you can define only one position budget for each position ID within a particular business unit. However, you can use the budgeted FTE to budget for more than one employee to be assigned to a particular position ID.

After you turn on the appropriate system options and create your position budgets, the system automatically creates a position activity record whenever you enter a position

ID for an employee. The system uses the values in the activity record to generate the projected through year-end values. The activity record includes the following:

- Employee
- Assigned position
- Date the employee was assigned to the position
- Employee's salary
- Standard hours per year
- Full-time equivalent
- Projected year-end amounts for salary, FTE, hours, and headcount, based on assignment date

Example: Budget Processing

You need a stock clerk position in your warehouse. To fill this position you need enough employees to equal 10 FTEs. The plant manager approves the need for this position, specifying that, to expedite training, you should hire no more than 14 people to fill the position (some of the employees can be part time). When you define the position budget, you enter the following data:

Salary	200000.00 (annual)
FTEs	10
Head count	14

The person with the appropriate authority approves the position. When you hire employees to fill the position, the system will immediately alert you if you exceed the budgeted amounts for salary, hours, FTE, or head count.

Before You Begin

- Set up position control information in the system options. See *Setting Up System Options* in the *HR and Payroll Foundation Guide*.
- Set up your business units and fiscal periods. See *Working with Business Units* and *Setting Up Fiscal Date Patterns* in the *General Accounting Guide*.
- If you want to associate job type codes with each position, define those job type codes. See *Defining Jobs* in the *HR and Payroll Foundation Guide*.

Defining Position Budgets Manually

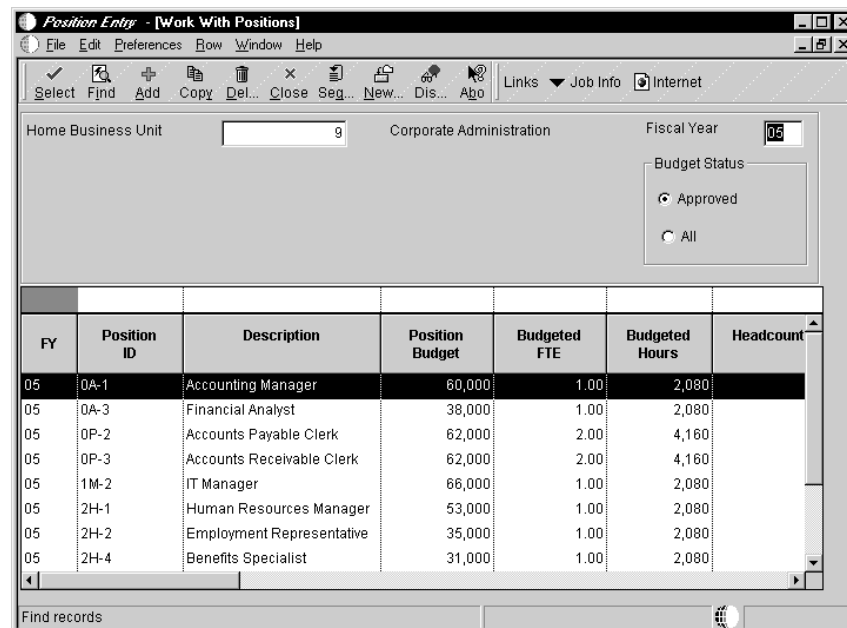
You typically define position budgets manually when one or both of the following occur:

- The initial position budget (the position budget for the first fiscal year for which you are using position control) does not equal the salary, standard hours per year, and FTEs for the employee that you intend to assign to the position. In this case, if you create position budgets automatically, you will need to manually revise the budget values.
- You want the identifier for the position (the position ID) to be different from the corresponding job type. When you create position budgets automatically, the program uses the corresponding job type for the position ID.

► **To define a position budget manually**

From the Daily Processing menu (G08BP1), choose Position Entry.

On Work With Positions



1. Click Add.

Position Entry - [Position Master Detail]

File Edit Preferences Form Window Help

Links Job Ty... Internet

Home Business Unit: 50 Project Management Company: Fiscal Year: 98

Position ID: A1 Description: President

Effective From Date: 1/1/98 Thru Date: 12/31/98

Budget Status: A Budget Status Date: 1/1/98

Position Status: A Position Status Date: 1/1/98

Job Type/Step: A1 President

Locality: Headquarters (default)

Position Budget Amount: 100,000 Effective Budget Amount: 100,000

Budgeted FTE: 30.00 Effective Budget FTE: 30.00

Budgeted Hours: 4,170 Effective Budget Hours: 4,170

Headcount: 2 Headcount: 2

Business Unit - Parent: 8

Parent Position ID: 0A-1

User Code 01: User Code 02: User Code 03:

User Code 04: User Code 05:

2. On Position Master Detail, complete the following fields:

- Home Business Unit
- Fiscal Year
- Position ID
- Description
- Position Budget Amount
- Budgeted FTE
- Budgeted Hours
- Headcount

3. To associate a job with the position budget, complete the following fields:

- Job Type/Step
- Locality

4. To enter status information, complete the following fields:

- Effective From Date
- Thru Date
- Budget Status
- Budget Status Date
- Position Status
- Position Status Date

5. Complete any of the following additional fields and click OK:

- Business Unit – Parent
- Parent Position ID
- User Code 01
- User Code 02
- User Code 03
- User Code 04
- User Code 05



Some of the definitions in the following field table refer to user defined code tables for system 07. For software releases prior to A8.1 or B8.1, these system codes are 06, not 07. When you revise user defined code tables, you must use the system code that corresponds to the software release that you are using.

Field	Explanation
Home Business Unit	The number of the business unit in which the employee generally resides.
Fiscal Year	<p>A number that identifies the fiscal year. You can enter a number in this field or leave the field blank to indicate the current fiscal year (as defined on the Company Numbers & Names form).</p> <p>Specify the year at the end of the first period rather than the year at the end of the fiscal period. For example, a fiscal year begins October 1, 2005 and ends September 30, 2006. The end of the first period is October 31, 2005. Specify the year 05 rather than 06.</p>
Position ID	<p>A code that you use for budgetary (position) control purposes. The position ID consists of:</p> <ul style="list-style-type: none"> • Position (position code and its description) • Fiscal year • Home business unit <p>For example, you can identify position A0–1 as Accounting Manager for fiscal year 2005–2006, for home business unit 41.</p> <p>You might choose to set up positions so that the position IDs are the same as the corresponding job IDs. Within a home business unit, positions appear in the alphanumeric sequence of their position IDs. For example, position A0-1 appears before position A0-2.</p>
Position Budget	The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table (F08101), represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position, for the business unit and year that you specified.

Field	Explanation
Budgeted FTE	<p>The number of full-time equivalents (FTEs) that your organization has budgeted for the position. A full-time equivalent is the portion of a full-time worker that an employee represents within a business unit. For example, an employee who works 20 hours per week represents .50 (one-half) FTE. An employee cannot represent more than 1 FTE.</p>
Budgeted Hours	<p>The number of hours that are budgeted for a position within a business unit for a period of one year. This is the total number of hours allotted to a position for all the full-time equivalents (FTEs).</p> <p>If you do not enter a value in this field when you budget the position, the system enters a default value. To determine that default value, the system searches the following sources, in the order that they are listed, and uses the value from the first of these sources that contains a valid value:</p> <ul style="list-style-type: none"> • The number of FTEs multiplied by the standard number of hours per year for the company associated with the business unit that you entered • The number of FTEs multiplied by the standard number of hours per year for Company 0 • A default value that you defined in the data dictionary when you set up your system • 2080
Headcount	<p>The number of employees requested, budgeted, or approved for a position or requisition.</p>
Job Type/Step	<p>A user defined code (07/G) that defines the jobs within your organization. You can associate pay and benefit information with a job type and apply that information to the employees who are linked to that job type.</p>
Locality	<p>A user defined code (07/SL) that defines the different salary localities within an organization. For example, you can compare salaries for employees on the East Coast with employees in the Midwest.</p>
Eff From	<p>The date on which a requisition, a position, or activity within a position takes effect.</p> <p>..... <i>Form-specific information</i></p> <p>When the date you enter in this field occurs after the first day of the fiscal year, the system calculates an effective budget for the position. The system also calculates an effective budget when you leave this field blank.</p> <p>Effective budget amounts are the amounts that the system uses to:</p> <ul style="list-style-type: none"> • Verify position budget information, if you have set up your system options to warn or prevent users from exceeding position budget amounts • Update general ledger information

Field	Explanation
Eff Thru	<p>The date on which a requisition, a position, or an activity within a position is no longer in effect. In position activity, the default value for this field is the end of the current fiscal year so that the system can calculate projected figures.</p> <p>..... <i>Form-specific information</i></p> <p>When the date you enter in this field occurs before the last day of the fiscal year, the system calculates an effective budget for the position. The system also calculates an effective budget when you leave this field blank.</p> <p>Effective budget amounts are the amounts that the system uses to:</p> <ul style="list-style-type: none"> • Verify position budget information, if you have set up your system options to warn or prevent users from exceeding position budget amounts • Update general ledger information
Budget Status	<p>A code that indicates the status of the position budget. The system uses the first character in the second description in the user defined code table 08/PC to process approved and closed positions. The position's budget must have an approved status before you can assign it to an employee or to an approved requisition. Positions with a closed budget status are not included when you run Create Next Year's Position Budgets (P081820).</p>
Budget Status Date	<p>The date that the current budget status became active.</p>
Position Status	<p>The current activity level of the position.</p> <p>When you attach an employee record to a vacant position, the system updates the position status with the position status code that has DEFA in its special handling code. The system updates the position status code on the beginning date of the employee's assignment. When the position again becomes vacant, you must manually change the value in the Position Status field.</p>
Position Status Date	<p>The date that the current status of the position became active.</p>

Field	Explanation
Business Unit – Parent	<p>A twelve-byte field used to identify the Business Unit (MCU) that this Position reports to, for example, the Supervisor's Business Unit.</p> <p>*** The Parent Position / Parent Business Unit must already exist as a Position ID/ Business Unit record in the Position Master File. ***</p> <p>For example, Bob Jones is a senior programmer in Business Unit 100 and he reports to Sally Abbot who is a junior manager in Business Unit 200.</p> <p>Bob Jones: Position ID = SRPRG, Business Unit = 100, Parent Position ID = JRMGR, Parent Business Unit = 200</p> <p>Sally Abbot: Position ID = JRMGR, Business Unit = 200</p>
Parent Position ID	<p>A code that identifies the higher-level position that this position reports to. For example, the supervisor position ID.</p> <p>Note: The parent position or parent business unit must already exist as a position ID or business unit record in the Position Master table.</p>
User Code 01	<p>A user defined code (08/P1) that classifies Position Master records (unique by fiscal year, business unit, and position ID) for reporting purposes.</p> <p>For example, you might classify positions by their field of work. In this case, position codes could be set up as follows:</p> <ul style="list-style-type: none">CLT Client ServicesENG EngineeringFIN Business FinanceLAB Contract LaborMGR Business ManagementPRG Programming

Processing Options for Position Master Detail

Pos Master

1. Enter a '1' to force entry of Job Type. Blank will issue a Warning if Job Type is left blank. If Position Control Criteria in Constants is not set to '1', the program will ignore this processing option.

JobTypeEntry

Defining Position Budgets Automatically

From the Position Control Setup menu (G08BP4), choose Start Position Control.

When you begin using the position control feature, you must decide whether to enter position budgets manually or run a program that creates them automatically.

You can define position budgets automatically when both of the following are true:

- Your initial position budgets equal the salary, hours, FTEs, and headcount that already exist in your current employee records.
- You plan to use your employees' job type codes as the position IDs.

When you define position budgets automatically, the program uses the employee's job type, job type description, home business unit, and salary as the respective position ID, position description, home business unit, and salary for the position budget. The program creates and populates the following tables:

- Position Master Information (F08101)
- Position Budget Detail (F08111)

When you define position budgets automatically, the system enters the budget status with an approved status code. Only positions with approved budget status codes can be assigned to employee records. Further, an approved requisition can reference only an approved position budget.

You might need to enter other information manually, such as effective dates or user defined information.

To modify position budget information after you have defined position budgets automatically, use Position Master Detail.

The program does not include an employee's job record when it creates position budgets if any of the following circumstances exist:

- The employee is terminated prior to the beginning of the current fiscal year.
- No job type exists in the employee's record.
- The employee has a hire date that occurs after the system date of the day that you started position control. For example, if you run Start Position Control on August 16th, and the employee's hire date is September 1st, the employee will not be included.

If more than one employee is associated with a job type within a home business unit, the system totals the values for all of the employees to generate values for the position budget.

What You Should Know About

Assigning position budgets You can assign an approved position budget to an approved requisition, and then assign both of them to an employee. You can assign an unapproved position budget to an unapproved requisition, and then assign both of them to an applicant.

Processing Options for Start Position Control

Options

This job has various options described below. Enter the desired values and press OK to continue.

1. Enter a '1' to Clear the Position Master File (F08101) and the Position Detail File (F08111). This should be done when this program is run for a second time or more. Default = ' '.
-

Entering Account Information for Positions

You enter account information for positions so that your accounting department can track the salary amounts that you have budgeted for each position. When you enter account information, you specify the accounts in the general ledger that are affected by the position budget. If you receive funding for a position from more than one source, you can divide the position budget among multiple accounts.

If your human resources department has the authority to determine salary amounts for position budgets, you can set up the system to summarize all position budgets and transfer the information to the general ledger accounts that you specify.

To enter account information for positions

From the Daily Processing menu (G08BP1), choose Position Entry.

On Work with Positions

1. To locate the position for which you need to enter account information, complete one or more of the following fields and click Find:
 - Fiscal Year
 - Home Business Unit
 - Position ID
2. Choose a record in the detail area, and then choose Position Acct Info (Position Account Information) from the Row menu.

Account Number	Account Description	Sub Type	Sub Type Description	Sub- ledger	Pos. Acct. Per cent	Annualized Budget Amount

3. On Position Account Information, complete the following field:
 - Account Number
4. To specify the method of calculation, complete the following field:
 - Percent or Amount (%A)
5. If the method of calculation (Percent or Amount field) is percent, complete the following field:
 - Pos. Acct Percent
6. If the method of calculation is amount, complete the following field:
 - Annualized Budget
7. Complete the following optional fields:
 - Sub- ledger
 - Sub Type
8. Click OK.

See Also

- *Transferring Position Budgets to the General Ledger*

Setting Up AAIs for Position Budgets

You set up AAIs to specify the accounts in the general ledger that contain position budget information. You, or someone in your accounting department, must set up AAIs in the General Accounting system. You cannot set up these AAIs from the Human Resources system.

These AAIs determine which accounts in the general ledger are used to calculate the financials budget that appears on the Business Unit by Organization form (P081200). You can review the financials budget for a position to determine whether it corresponds to the amount that you entered for the position in the Human Resources system.

The following table lists AAIs for position budgeting. The system adds the amounts in all the accounts between and including the first and last accounts to calculate the financials budget.

HRLT	The ledger type where budget information is stored
HRSB	The first account in the range of object accounts for a business unit
HRSE	The last account in the range of object accounts for a business unit

You should create these three AAIs for each company in your organization that has position budgets. The system stores AAIs in the Automatic Accounting Instructions Master table (F0012).

See Also

- *Working with AAIs* in the *General Accounting Guide* for instructions for setting up AAIs

Transferring Position Budgets to the General Ledger

After you define your position budgets and position accounts, you can post detailed information for position budgets to the Account Ledger table so that your accounting department can access it.

Depending on the requirements of your accounting and human resources departments, you can transfer either summary information for position budgets or detailed information.

Summary information includes monthly totals of salary amounts and hours for all the position budgets that you specify. Detailed information includes a record of the salary amount and hours for each individual position budget.

To transfer summary information to the general ledger, you must transfer position budgets to the Account Balances table. To transfer detailed position budget information, you can post position budgets to the Account Ledger table.

You can use Position Account Information to identify the general ledger accounts that you want to transfer the information to.



You transfer position budget information to the general ledger only if your human resources department is responsible for creating salary budgets. To avoid overwriting information, you should not transfer position budget information to the general ledger if your accounting department determines the salary budgets for your organization.

To transfer position budgets to the general ledger, complete one of the following tasks:

- Transferring position budgets to the Account Balances table
- Posting position budgets to the Account Ledger table

Before You Begin

- Define your position budgets. See *Defining Position Budgets*.

See Also

- *Entering Annual Budget Amounts* and *Entering Detailed Budget Amounts* in the *General Accounting Guide*

Transferring Position Budgets to the Account Balances Table

From the Position Control Adv/Tech Operations menu (G08BP3), choose Update Position Budgets to Account Balances.

To create or refresh your position budget accounts, you transfer summary position budget information to the general ledger Account Balances table. You typically perform this task to establish an initial budget for a new year.

As you work through the budgeting process, you can transfer three types of position budgets to the Account Balances table:

- Requested budgets
- Approved budgets
- Final (also known as original) budgets

You use a different version of Update Position Budgets to Account Balances to transfer each of these types of position budgets. This program updates the Account Balances table (F0902). You, or someone in your accounting department, can review this information as you work through the budgeting process.

When you run this program for the requested position budgets, the system updates the approved and final budget fields for the same account in the Account Balances table with the same values. When you run this program for the approved budget, the system also updates the final budget for the same account in the Account Balances table with the same value. When you run the program for the final budget, the system updates only that value. In this case, the values for requested and approved budgets remain the same.

The system transfers to the general ledger only effective hour values (BU) and effective budget amounts (BA) for positions.

Because this program overwrites all existing information in the Account Balances table, you transfer position budgets to the Account Balances table only when you are setting up budgets for a new year. If you need to revise position budgets in the middle of the year, do not rerun this program. Instead, post position budgets to the Account Ledger table. See *Posting Position Budgets to the Account Ledger Table*.

Processing Options for Update Position Budgets to Account Balances

UPDATE OPTIONS

1. Enter a "1" to update account balances file (F0902).

LEDGER TYPE

1. When entering budgets to the actual and units ledgers, the ledger type "BA" and "BU" is assumed. If you wish to enter a different ledger (such as a temporary budget or a revised budget), you must designate the alternate budget ledger types.

Salaries Budget Ledger: _____

Hours Budget Ledger: _____

Note: The ledger codes on this screen must be valid in User Defined Codes 09/LT. If not, the program will not function. Also the following ledger types can not be updated by this program: AA, CA, XA, YA, ZA, AC.

FISCAL YEAR

1. Enter the last two digits of the fiscal year.

BUDGET CYCLE

1. Enter a "1" next to each item you wish to update in the Account Balances file (F0902). If all items are left blank, the default will only update the Fiscal Budget.

Requested Budget: _____

Approved Budget: _____

Final Budget: _____

REPORT TYPE

1. Enter "0" for an Exception Report. Enter a "1" to have a Summary or a Detail Report. (See option below)

2. Enter "0" for a Summary Report. Enter a "1" for a Detail Report. This option is ignored if only an Exception Report is requested. (See option above)

Posting Position Budgets to the Account Ledger Table

From the Position Control Adv/Tech Operations menu (G08BP3), choose Update Position Budgets to Account Ledger.

To track detailed information for your position budgets, you can update the position budget information to a temporary Account Ledger (F0911Z1) table. The Accounting department posts the temporary Account Ledger table to the live Account Ledger (F0911) table. Position budgets must have an approved status before you can post

them. When you post position budgets to the Account Ledger table, you can distribute them among as many as 12 periods in the Account Balances table (F0902).

See Also

- *Posting Journal Entries* in the *General Accounting Guide* for more information about posting information to the Account Ledger table

Processing Options for Update Position Budgets to Account Ledger

Transaction

1. Transaction Description, up to 30 characters _____
2. Date to be posted for this transaction. If left blank, the system date will be used. _____

Ledger Type

1. When entering budgets to the actual units ledgers, the ledger type "BA" and "BU" are assumed. If you wish to enter to a different ledger (such as a temporary budget or a revised budget), you must designate the alternate budget ledger type. Note: The ledger codes entered here must be valid in User Defined Codes 09/LT. If not, the program will not function. Also, the following ledger types cannot be updated by this program: AA, AC, CA, XA, YA, ZA _____

Fiscal Year

1. Last two digits of the fiscal year _____

Reports

1. "0" or <Blank> to output an Exception (error) report only; "1" to also output a summary or a detailed report (see option below) _____
2. "0" or <Blank> to output a summary report (sub-totals per account no., sub-ledger, and sub-ledger type); "1" to output a detailed report. This option is ignored if only an exception report is requested (see option above). Caution: A detailed report may be too big. _____

Proof/Update

1. "0" or <Blank> for Proof mode; "1" for Update mode (records will be written to file F0911Z1, Journal Entry Transaction - Batch File). Use Proof mode to examine data, fix errors if any, then rerun it in Update mode. _____

Revising Position Budgets by Business Unit

After you define position budgets, you can easily review and update a group of position budgets for the same business unit and fiscal year. You can use this revision method when you need to update several position budgets that are in the same business unit.

When you review the positions by business unit, you can compare the budgeted amounts for each position with the projected amounts, and use this information to determine whether a position budget will be met by the end of a fiscal year.

The system calculates the budgeted and projected amounts using the fiscal year that you enter on the form. If you do not enter a fiscal year, the system uses the default fiscal year for the home business unit.

To revise position budgets by business unit

From the Daily Processing menu (G08BP1), choose Position Entry.

On Work With Positions

1. Complete the following fields and click Find:
 - Home Business Unit
 - Fiscal Year
2. From the Row menu, choose Positions by Business Unit.

Position ID	Description	Position Budget	Budgeted FTE	Budgeted Hours	Budgeted Headcount
0A-1	Accounting Manager	60,000	1.00	2,080	1
0A-3	Financial Analyst	38,000	1.00	2,080	1
0P-2	Accounts Payable Clerk	62,000	2.00	4,160	2
0P-3	Accounts Receivable Clerk	62,000	2.00	4,160	2
1M-2	IT Manager	66,000	1.00	2,080	1
2H-1	Human Resources Manager	53,000	1.00	2,080	1
2H-2	Employment Representative	35,000	1.00	2,080	1
2H-4	Benefits Specialist	31,000	1.00	2,080	1
2H-5	EEO Specialist	32,500	1.00	2,080	1
4A-1	Administrative Assistant	75,000	3.00	6,240	3
8M-1	Maintenance Engineer	25,000	1.00	2,080	1
9S-2	Sales Representative	75,000	3.00	6,240	3
A1	President	110,000	1.00	2,080	1

3. On Revise Positions by Business Unit, revise the information in any of the following fields and click OK:

- Position ID
- Description
- Position Budget
- Budgeted FTE
- Budgeted Hours
- Budgeted Headcount
- Eff From
- Eff Thru
- Job Type
- Job Step
- Budget Status
- Position Status
- Position Status Date
- Reports to BU
- Reports to Pos

Field	Explanation
Reports to BU	<p data-bbox="743 258 1422 348">A twelve-byte field used to identify the Business Unit (MCU) that this Position reports to, for example, the Supervisor's Business Unit.</p> <p data-bbox="743 369 1422 459">*** The Parent Position / Parent Business Unit must already exist as a Position ID/ Business Unit record in the Position Master File. ***</p> <p data-bbox="743 480 1422 571">For example, Bob Jones is a senior programmer in Business Unit 100 and he reports to Sally Abbot who is a junior manager in Business Unit 200.</p> <p data-bbox="857 571 1422 661">Bob Jones: Position ID = SRPRG, Business Unit = 100, Parent Position ID = JRMGR, Parent Business Unit = 200</p> <p data-bbox="857 661 1422 720">Sally Abbot: Position ID = JRMGR, Business Unit = 200</p>
Reports to Pos	<p data-bbox="743 747 1422 806">A code that identifies the higher-level position that this position reports to. For example, the supervisor position ID.</p> <p data-bbox="743 827 1422 919">Note: The parent position or parent business unit must already exist as a position ID or business unit record in the Position Master table.</p>

Working with Position Activity Information

After you define and approve your position budgets, you can attach employee records to them. You attach employee records to ensure that the actual salaries, hours, and FTEs for your employees are within those that you established for your position budgets. Position activity illustrates employee movement into and out of positions. To help you determine appropriate position budgets, you can set up your system to store historical records of position activity.

When an employee changes positions or leaves your organization, you must update the employee's record to reflect the change. You can set up your system to create position activity records when you update position-sensitive information in employee records.

You can also review position activity information to verify that it is correct. You can review position activity online, or you can print a report. You can correct position activity records if you entered incorrect position information for an employee.

Working with position activity includes the following tasks:

- Attaching an employee record to a position budget
- Reviewing position activity
- Correcting employee position activity

Attaching an Employee Record to a Position Budget

After you define and approve your position budgets, you can attach employee records to them. You attach an employee record to a position budget to control budget expenditures and to ensure data integrity. To attach an employee record to a position budget, you enter a position ID in the employee's record.

To help you stay within your position budgets when you are entering employee information, the system sends you either an error or a warning message when you exceed the approved salary, hours, FTE, or head count for the position. When you set up your system options, you define the type of message that appears when a position's effective budget is exceeded.

When you attach an employee record to a position budget, the system performs the following functions:

- Adds the salary, hours, FTEs, and head count amounts for the employee to the projected position budget amounts through the fiscal year end.

- Adds to the employee's record any job information that is associated with the position.
- Updates the Position Budget Detail table (F08111) with the effective date of the employee's assignment, the employee's salary, FTE, and hours. The system then uses this information to project the effect of these values on the budget through the end of the fiscal year.

Before You Begin

- Verify that you have set up position control options. See *Setting Up System Options* in the *HR and Payroll Foundation Guide*.
- For each position to which you need to attach employee records, verify that the budget status is approved. See *Defining Position Budgets*.

To attach an employee record to a position budget

From the Employee Management menu (G05BE1), choose Organizational Assignment.

On Work with Organizational Assignment

1. To locate the employee record, complete the following field and click Find:
 - Employee Identification
2. Choose the employee record and click Select.
3. On Organizational Assignment, complete the following field:
 - Position ID

See Also

- *Adding Employee Records One at a Time* in the *HR and Payroll Foundation Guide* for information about how processing options affect position assignments

Processing Options for Organizational Assignment

Defaults

JOB INFORMATION - Enter '1' to always default job information when adding an employee or changing the job of an employee. (Default is '0').

1. Default Job Information on ADD _____
2. Default Job Information on CHANGE _____

JOB CATEGORY CODES - Enter '1' to always default the job category codes when adding an employee or changing the job of an employee. (Default is '0').

3. Default Job Category Codes on ADD _____
4. Default Job Category Codes on CHANGE _____

Reviewing Position Activity

To help you determine whether you stay within the budgeted amounts for salary and head count through the end of the fiscal year, you can review position activity information. You can review position activity either by position or by employee. The type of information that appears on the form varies depending on whether you review position activity by employee or by position.

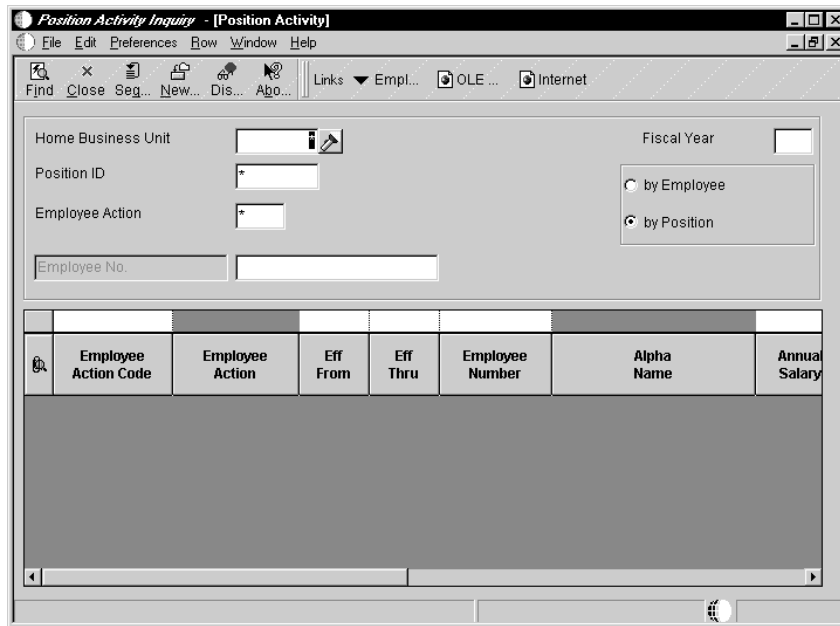
When you review information by employee, you can see all of the positions in which an employee has worked. You can also review position information for an employee who works in more than one position during a fiscal year.

When you review activity by position, you can see all employees who are associated with a particular position budget. You can also review projected totals for salary, headcount, FTE, and hours worked. The system calculates these totals using all active and inactive records for the specified year, based on the home business unit that you enter.

► To review position activity

From the Daily Processing menu (G08BP1), choose Position Activity Inquiry.

On Work with Position Activity



1. To define whether you want to review information by position or by employee, click one of the following options:
 - by Position
 - by Employee
2. If you clicked the option for reviewing activity by position, complete the following fields and click Find:
 - Home Business Unit
 - Fiscal Year
 - Position ID
3. If you clicked the option for reviewing activity by employee, complete the following field and click Find:
 - Employee Identification
4. To limit either type of search to a particular employee activity, complete the following field and click Find:
 - Employee Action
5. Review the information.

Field	Explanation
Employee Action	The type of action linked to the employee. The following codes are provided by J.D. Edwards and should not be changed: blank Active A Adjust status, such as salary, FTE, hours E Expired L Leave of absence T Transfer (from one business unit to another) X Terminate

Correcting Employee Position Activity

When an employee changes positions or leaves your organization, you must update the employee's record to reflect the change. You can set up your system to create historical records of the information you have changed. In addition to these employee history records, you can set up your system to create position activity records when an employee does any of the following things:

- Enters a position
- Leaves a position
- Changes positions within your organization

When you are also tracking position information for employees, the system also creates position activity records when an employee does any of the following things:

- Moves from one home business unit to another within your organization
- Changes jobs or job steps
- Receives a salary change
- Changes FTE values
- Changes the number of hours worked

Tracking position activity records makes it easy to review all of the employees who ever worked in a specific position.

You can correct position activity records if you made a mistake when you entered position information for an employee. For the current activity record, you can correct all position activity information. For historical activity records, you can correct the requisition number and remarks only.

In addition to correcting employee position activity, you can also use Employee Activity to enter historical position activity information that you previously stored in another system.



Because the system does not create an audit trail of the changes that you make when you correct position activity records, J.D. Edwards recommends that you assign this program high security.

This program updates the Position Budget Detail table (F08111). It does not update the employee history tables.

▶ To correct employee position activity

From the Position Entry menu (G08BP1), choose Enter Employee Activity.

On Work With Employee Activity

Home Business Unit	Position ID	Eff From	Eff Thru	Em Ac	Annual Salary	FTE	Hours
9	2H-1	3/3/97			50,000.00	1.00	2080.00

1. To locate the employee record, complete the following field and click Find:
 - Employee Identification
2. Choose the current activity record and click Select.

The screenshot shows a software window titled "Enter Employee Activity - [Employee Activity]". The window contains several input fields and labels:

- Home Business Unit: [] Corporate Administration
- Position ID: 2H-1 Human Resource Mgr.
- Address Number: 7500 McDougle, Cathy
- Effective From Date: 3/3/97
- Effective Thru Date: []
- Employee Action: Active
- Salary: ANNUAL: 50,000.00 EFFECTIVE: 50,000.00
- Full Time Equivalents: ANNUAL: 1.00 EFFECTIVE: 1.00
- Hours: ANNUAL: 2080.00 EFFECTIVE: 2080.00
- Requisition Number: []
- Remark: []

3. On Employee Activity, change the incorrect information in any of the following fields and click OK:

- Effective Thru Date
- Employee Action
- Salary
- Full Time Equivalents
- Hours
- Requisition Number
- Remark

Field	Explanation
Employee Action	The type of action linked to the employee. The following codes are provided by J.D. Edwards and should not be changed: blank Active A Adjust status, such as salary, FTE, hours E Expired L Leave of absence T Transfer (from one business unit to another) X Terminate

What You Should Know About

Alternate entry method You can use Revise Employee Activity to correct multiple position activity records at the same time. To access this form, choose Revise Emp Activity from the Row menu on Work With Employee Activity.

See Also

- *Setting Up System Options* in the *HR and Payroll Foundation Guide* for information about setting up your system to create position activity records
- *Reviewing the Employee Position Activity Report* for information about reviewing all of the position activity for each employee within your organization

Reviewing Position Budget Information

To ensure that the salary amounts that you defined in your position budgets compare favorably with the actual salaries of the employees in those positions, you should periodically review position budget information. You can review this information for a specific business unit or position or by the activity involving the position.

When you review position budget information, the system displays projected year-end salary amounts that you can use to compare with budgeted amounts. The system calculates these amounts based on the employees' annualized salaries and their associated effective dates. The system calculates projected year-end amounts by adding together the prorated annualized salaries for all of the employees who were in the position during the year. If an employee does not work an entire year in the same position, the system prorates the employee's annualized salary for the amount of time that the employee worked in the position during the fiscal year.

For example, assume that the following conditions exist:

- Position A1 (accountant) pays an annual salary of 42,000.
- Cathy worked in position A1 from January 1 through April 30 (85 days multiplied by 8 hours = 680 hours), so her projected annualized salary for that position is 13,730.77 (42,000 divided by 2080 = 20.19; 20.19 multiplied by 680 hours = 13,729.20).
- The position was vacant from May 1 to May 31.
- George worked in position A1 from June 1 through December 31 (153 days multiplied by 8 hours = 1224 hours) and his projected annualized salary was 24,715.38 (42,000 divided by 2080 = 20.19; 20.19 multiplied by 1224 hours = 24,712.56).

The system calculates the projected year-end amount for position A1 as 38,446.15 (13,730.77 plus 24,715.38).

Reviewing position budget information consists of the following tasks:

- Reviewing position budget information by business unit
- Reviewing position budget information by position

Reviewing Position Budget Information by Business Unit

To determine whether the position budget amounts for a business unit compare favorably with the amounts that your accounting department budgeted for salaries, you can review position budget information by business unit. To determine whether you are likely to remain within position budget amounts through the end of the fiscal year, you can also review projected year-end salary amounts for each business unit.

A positive open amount for salary, hours, head count, or FTE indicates that you are under budget for the fiscal year. A negative open amount indicates that you are over budget for the fiscal year.

► To review position budget information by business unit

From the Daily Processing menu (G08BP1), choose Business Unit by Organization.

On Work With Business Unit by Organization

Co	Description	LOD	Home Business Unit	Division	Financials Budget	Position Budget	Projected At Year End	Effecti Budge
00001	Financial/Distribut 1		1	110				
00001	Central Branch	1		3 197	550,000.00			
00001	Southern Branch	1		4 197				
00001	Western Branch	1		5 197				

1. Complete any of the following fields and click Find:
 - Company
 - Fiscal Year
 - Level of Detail
 - Division
 - Home Business Unit
2. Review the information in the following fields and click Close:

- Financials Budget
- Position Budget
- Projected At Year End
- Effective Budget

You can use the Position and Effective tabs to change the order in which the fields appear on the grid.

Field	Explanation
Company	<p>A code that identifies a specific organization, fund, entity, and so on. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p> <p>NOTE: You can use Company 00000 for default values, such as dates and automatic accounting instructions (AAIs). You cannot use Company 00000 for transaction entries.</p>
Level of Detail	<p>A code that identifies the relationship of parent and subordinate business units in a hierarchy. Up to nine levels of detail are available. Level one is the least detailed, and level 9 is the most detailed.</p> <p>An example would be a project number 10000 for Office Parks that has a level of detail of 2. Subordinate to the Office Parks project are the North and the South Office Parks with job numbers of 10010 and 10020, respectively, and each with a level of detail of 3. Subordinate to the North and South Office Parks are Buildings A and B and Buildings C and D, respectively, each with a level of detail of 4.</p> <p>..... <i>Form-specific information</i></p> <p>A number that indicates a business unit's position within the hierarchy of your organization. Levels of detail are defined in the General Accounting system. When you review business units by organization, use the Level of Detail field to limit the number of positions that appear to those within a specific level of detail. If you leave this field blank, the system displays positions in all business units in the hierarchy.</p>
Division	<p>Category code 1 associated with the Business Unit Master table (F0006). This is a user defined code (system 00, type 01) that the system uses in flex account mapping and in printing selected information on reports.</p>

Field	Explanation
Financials Budget	<p>The salary amount that the accounting department has budgeted for a particular position within a business unit. The system calculates this amount by totaling the original budgets for all salary accounts within the business unit.</p> <p>You use automatic accounting instructions (AAIs) to specify the range of accounts to use for salary accounts. This range must be from HRSB to HRSE, with a ledger type of HRLT. The system uses these AAIs to determine which records in the Account Balances table (F0902) to use to calculate the financials budget.</p>
Position Budget	<p>The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table (F08101), represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position, for the business unit and year that you specified.</p>
Projected At Year End	<p>A figure that represents the amount of salary paid over a period of time.</p> <p>At the employee level, the system calculates this amount by multiplying the employee's annual salary by the fraction of the fiscal year that the employee worked.</p> <p>At the business unit level, the system calculates this amount as the sum of all the employee activity in the position for the fiscal year.</p> <p>For example, an employee earning 40,000 annually who works from April 1 to December 31 represents a projected salary cost of 30,000 for that year.</p>
Effective Budget	<p>The salary amount that is budgeted for a particular position within a business unit. This figure, which comes from the Position Master table (F08101), represents the total salary amount budgeted for all of the full-time equivalents (FTEs) within this position. The system uses the effective from and effective through dates to calculate the effective salary amount that is budgeted. If the effective through date is blank, the system uses the end date for the fiscal year to calculate the effective salary budget.</p> <p>..... <i>Form-specific information</i></p> <p>This field displays the sum of all projected amounts for all of the current positions. This amount is the total salary projection for the business unit.</p>

Reviewing Position Budget Information by Position

To compare budgeted amounts for salaries, FTEs, hours, and head count with the corresponding actual amounts that are projected through year end, you can review

position budget information by position. You use this information to determine whether you expect to meet or exceed your position budgets through the end of the year.

A positive open amount for salary, hours, head count, or FTE indicates that you are under budget for the fiscal year. A negative open amount indicates that you are over budget for the fiscal year.

The system calculates the budgeted and projected amounts using the fiscal year that you enter on the form. If you do not enter a fiscal year, the system uses the default fiscal year for the company associated with the home business unit that you entered.

► To review position budget information by position

From the Daily Processing Menu (G08BP1), choose Positions by Business Unit.

On Work with Positions by Business Unit

Position ID	Description	Open FTE	Salary Budgeted	Salary Eff. Budgeted	Salary Projected
0A-1	Accounting Manager		60,000	60,000	35,250.00
0A-3	Financial Analyst		38,000	38,000	38,000.00
0P-2	Accounts Payable Clerk	1.00	62,000	62,000	29,640.00
0P-3	Accounts Receivable Clerk	1.00	62,000	62,000	28,808.00
1M-2	IT Manager		66,000	66,000	55,750.00
2H-1	Human Resources Manager		53,000	53,000	50,000.00
2H-2	Employment Representative	1.00	35,000	35,000	
2H-4	Benefits Specialist	.57	31,000	31,000	11,904.11

1. Complete the following fields and click Find:
 - Home Business Unit
 - Fiscal Year
2. Review the information in the following fields and click Close:
 - Position ID
 - Description
 - Open FTE
 - Salary Budgeted

- Salary Eff. Budgeted
- Salary Projected
- FTE Budgeted
- FTE Projected
- Headcount

Defining Next Year's Position Budget

Although a position budget is valid for only one fiscal year, you do not need to enter position budget information each year. You can choose from several options to automatically generate the next fiscal year's budget amounts. For example, when the position budget information for next year will be the same as the corresponding information for the current year, you can save time by running a program that automatically creates position budgets for the next fiscal year. These position budgets can be based on the position budgets for the current year in the Position Master table (F08101) or on the position activity records in the Position Detail table (F08111). If your position budget is increasing or decreasing by a consistent amount, you can set processing options to increase or decrease the new budget amount and the new budget full-time equivalents, hours, and headcounts by flat percentages.

When you run this program, the system performs the following functions:

- Creates the position, fiscal year, home business unit, and position ID and description
- Prints an exception report that lists any existing positions that have effective through dates that are prior to the end of the current fiscal year.
- Creates a position accounts table for the next fiscal year (optional)

Depending on how you set the processing options, the system does not create budgets for the following positions:

- Closed positions
- Vacant positions that had no activity during the year

The system generates an exception report that lists the positions for which no budgets were created.

Before You Begin

- Set up the fiscal date patterns for the next fiscal year. See *Setting Up Fiscal Date Patterns* in the *General Accounting Guide*.
- Set up a salary default source in your system options. See *Setting Up System Options* in the *HR and Payroll Foundation Guide*.

To define next year's position budget

From the Position Control Adv/Tech Operations menu (G08BP3), choose Create Next Year's Positions.

Data Selection

The data selection for this program must include the fiscal year from which you want the system to calculate position budget information.

Processing Options: Create Next Year's Position Budgets

Calculation Basis Dates Tab

For information about a processing option, right-click the processing option field and choose What's This from the menu. Or click the processing option field and press F1.

These processing options allow you to specify the year on which you are basing new position budgets and the year for which you are calculating them, as well as the effective date for pay rates or pay grade steps.

1. Based On Fiscal Year

Use this processing option to specify the year on which you are basing new position budgets. Typically, this is the current year. Enter the last two digits of the year.

2. New Fiscal Year

Use this processing option to specify the year for which you are creating position budgets. Typically, this the next fiscal year. Enter the last two digits of the year.

3. Effective Dates for Pay Rates or Pay Grade Step

Use this processing option to specify the effective date of the pay rates or pay grade steps that you are using to create next year's position budget. Enter a date in this field only if you use the pay rate or pay grade step methods of salary calculation.

Process Tab

For information about a processing option, right-click the processing option field and choose What's This from the menu. Or click the processing option field and press F1.

These processing options allow you to specify the positions for which you are going to budget and the table from which you create them.

1. Select Position Budgets

Use this processing option to specify the positions for which you want to budget and whether you want the budgets created from the Position Master table (F08101) or the Position Detail table (F08111). The Position Master table contains budgeted amounts, while the Position Detail table contains the actual amounts. Valid values are:

- 1 All position budgets (default).
- 2 Position budgets with current activity.

Options 1 and 2 generate budgets from the Position Master table. If you choose option 1, the system will calculate budgets for all positions in the Position Master table. If you choose option 2, the system will calculate budgets for positions that have at least one active employee in the Position Detail table.

- 3 Position budgets with activity during the year.
- 4 Position budgets with current activity.

Options 3 and 4 generate budgets from the Position Detail table. If you choose option 3, the system will calculate budgets for positions that have had activity during the year, even if the positions are currently vacant. If you choose option 4, the system will calculate budgets only for positions that have current activity for the year.

2. Create Budgets for Prior Positions

Use this processing option to specify whether to create budgets for positions that ended prior to the beginning of the new fiscal year. A position ended prior to the beginning of the new fiscal year when the Thru Date for that position is prior to the beginning of the new fiscal year. An exception report will list all positions that are created in this manner. Valid values are:

- Blank Do not create budgets for prior positions.
- 1 Create budgets for prior positions.

3. Create Positions Accounts

Use this processing option to specify whether to create position accounts, in addition to position budgets, for the new fiscal year. Position accounts let you allocate your position budgets by percentage to various accounts in the General Accounting system. Valid values are:

- Blank Do not create position accounts.
- 1 Create position accounts.

Options Tab

For information about a processing option, right-click the processing option field and choose What's This from the menu. Or click the processing option field and press F1.

These processing options allow you to specify the percentages by which to change previous budget amounts.

1. Percent Change in New Budget Amount

Use this processing option to enter the percent of increase or decrease from the old to the new budget amounts. Enter percentages as whole numbers. Use a negative number to indicate a decrease. For example, enter 5 for a 5% increase or enter -5 for a 5% decrease.

2. Percent Change in Full-Time Equivalents (FTEs), Hours, and Headcount

Use this processing option to enter the percent of increase or decrease from the old to the new values for full-time equivalents, hours, and headcount. Enter percentages as whole numbers. Use a negative number to indicate a decrease. For example, enter 5 for a 5% increase or enter -5 for a 5% decrease.

Working with Parent/Child Relationships by Position

To provide executives and managers with a summary of the reporting relationships within your organization, you can define an organizational structure that shows the flow of information within your organization. You can create an organization structure that shows reporting relationships among the positions within your organization. These relationships are called parent/child relationships.

Working with parent/child relationships by position includes the following tasks:

- Creating parent/child relationships by position
- Reviewing parent/child relationships by position

Before You Begin

- Set up parent/child structure types in user defined code list 01/TS. See *Setting Up User Defined Codes* in the *HR and Payroll Foundation Guide*

See Also

- *Creating Parent/Child Relationships by Employee* in the *HR and Payroll Foundation Guide* for information about defining organizational structures by employee

Creating Parent/Child Relationships by Position

To show the reporting relationships among different positions within your organization, you can create parent/child relationships by position. For example, you can organize a reporting structure in which you define group leaders as parent positions to programmer analysts. The group leaders are, in turn, child positions to a department manager.

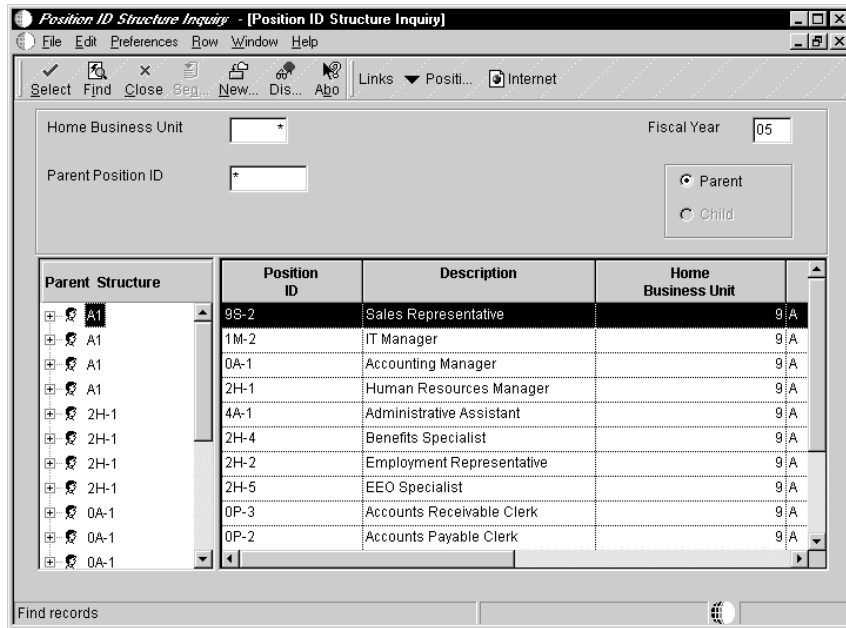
Defining parent/child relationships by position eliminates the need to continually revise an organizational structure when individual employees change jobs.

You can create parent/child relationships at any time that your management needs require it. For example, if your organization is resizing, you might need to create a parent/child relationship that shows the number of positions reporting to the first-level managers, and distribute that structure to all of the managers.

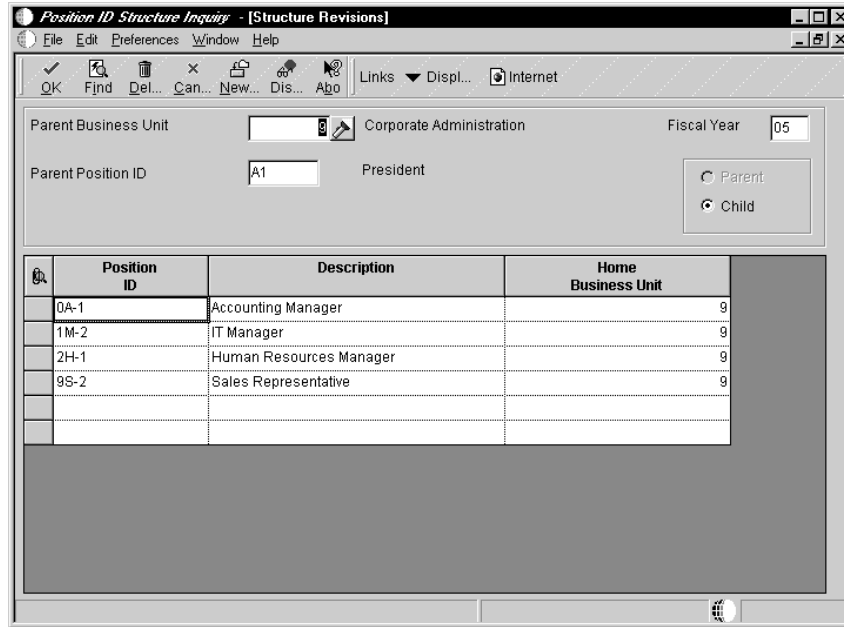
▶ **To create parent/child relationships by position**

From the Daily Processing menu (G08BP1), choose Position ID Structure Inquiry.

On Position ID Structure Inquiry



1. To locate the positions for which you are creating parent/child relationships, complete the following fields and click Find:
 - Home Business Unit
 - Fiscal Year
2. To limit the positions that appear, complete the following field and click Find:
 - Parent Position ID
3. In the detail area, choose a parent or child position and click Select.



4. On Structure Revisions, complete the following field:
 - Parent Position ID
5. Complete the following fields in the detail area and click OK:
 - Position ID
 - Home Business Unit
6. On Position ID Structure Inquiry, review the structure that you created.

Field	Explanation
Parent Position ID	A code that identifies the higher-level position that this position reports to. For example, the supervisor position ID. Note: The parent position or parent business unit must already exist as a position ID or business unit record in the Position Master table.

Reviewing Parent/Child Relationships by Position

After you define parent/child relationships by position, you can analyze the reporting relationships among the positions in your organization by reviewing the following structures:

- A single-level hierarchy that shows only the subordinate positions directly under a parent position

- A multiple-level hierarchy that shows all of the subordinate positions directly under a parent position, but also all of the positions that report to each subordinate

▶ **To review parent/child relationships by position**

From the Daily Processing menu (G08BP1), choose Position ID Structure Inquiry.

On Position ID Structure Inquiry

1. Complete the following fields and click Find:
 - Home Business Unit
 - Fiscal Year
2. To limit the positions that appear, complete the following field and click Find:
 - Position ID
3. To review the employee number of the employee who is currently in a position, choose the position in the detail area, and then choose Current Incumbents from the Row menu.

Purging Position Information

If your system contains out-of-date position records, you can purge these records or you can archive them by moving them to tape or to an alternate backup system to clear space on your system. You can also create a report of the records that this program will purge before you purge them.

Purging position information includes the following tasks:

- Purging positions
- Purging position activity

Purging Positions

From the Position Control Adv/Tech Operations menu (G08BP3), choose Purge Positions.

To purge outdated positions from the Position Master table, run Purge Positions. For example, you can purge records from past years that are no longer relevant. You can also purge all position records from a certain fiscal year, or select which records to purge using data selection.

Processing Options for Purge Positions

Purge Positions

1) To create a report and delete the Position Master records enter '1'. To create a report, delete the Position Master records and save it to a purge table enter '2'. Default of blank will only create the report.

* Important Note * When choosing '2', the purge table is named F08101P. This table is created every time the user chooses '2'. However, it is important to remember that the purge table is over written every time the program is executed.

Purging Position Activity

From the Position Control Adv/Tech Operations menu (G08BP3), choose Purge Position Activity.

To purge employee position-activity records that are no longer needed, run Purge Position Activity. For example, you might remove records of former employees.

Processing Options for Purge Activity Options

Purge Activity

1. Enter a <blank> to only create a report (default); Enter "1" to delete records from the Position Budget Detail table (F08111); Enter "2" to delete records from the Position Budget Detail table and save the deleted records in a purge table. A report is always created.

Important Note: The purge table is F08111P. It is purged and over-written every time this program is run with Purge Activity = "2".

Reviewing Position Control Reports

To ensure that the salary amounts that you defined in your position budgets compare favorably with the actual salaries, FTEs, hours worked, and headcount of the employees in those positions, you should periodically review position budget information. To do this, you can print position reports. You can review this information for current, previous, or future fiscal years.

You can also use position reports to review the most recent changes that have been made to position budgets.

Reviewing position reports includes the following tasks:

- Reviewing the Open Amounts by Position report
- Reviewing the Cross-Year Budget Comparison report
- Reviewing the Position Control Comparison reports
- Reviewing the Position Budgets report
- Reviewing the Employee Position Activity report
- Reviewing the Position Budgets by Job Type and Step report

Reviewing the Open Amounts by Position Report

From the Daily Processing menu (G08BP1), choose Open Amounts by Position.

To review position information for salaries, FTEs, and hours worked, print the Open Amounts by Position report. Use this information to compare budgeted amounts with projected amounts through the fiscal year end. The report displays open amounts, which are the differences between budgeted and projected amounts.

The way in which the system calculates the projected amounts depends on the fiscal year for which you defined the position. The system uses the fiscal pattern for the company with which the position is associated when it calculates these amounts. The system uses the beginning of the fiscal year date and the end of the period-14 date for the fiscal pattern as the start and end date ranges for the position's fiscal year. All position activity records that overlap the ranges are included in the projection calculations.

See Also

- R081420, *Open Amounts by Position* in the *Reports Guide* for a report sample

Processing Options for Open Amounts by Position

Options

Open Amounts by Position

A value of '1' will show Effective Budgeted Amounts. A default of blank will show Budgeted Amounts.

Reviewing the Cross-Year Budget Comparison Report

From the Daily Processing menu (G08BP1), choose Cross Year Budget Comparison.

To simultaneously review the position budgets for two fiscal years, print the Cross-Year Budget Comparison report. You can compare the budget information for two years in a side-by-side format. The report also displays the percentage change in each budget from one fiscal year to the next.

The system calculates the percentage change amounts by dividing the difference between the budget amounts for each year by the first year's budget amount, as it appears in the left-most column of the report.

See Also

- R081430, *Cross-Year Budget Comparison* in the *Reports Guide* for a report sample

Processing Options for Cross-Year Budget Comparison

Options

Cross Year Comparison : All Business Units

This job has various options described below. Enter the desired values.

Enter the first fiscal year (two digits) to be displayed. _____
Enter the second fiscal year (two digits) to be displayed. _____

Amounts

Enter a '1' to see Effective Amounts, a default of blank will show Budgeted Amounts.

Reviewing the Position Control Comparison Reports

From the Daily Processing menu (G08BP1), choose Position Control Comparison.

You can run three comparison reports:

- Position Control Headcount Report
- Position Control Budgeted FTE Report
- Position Control Effective FTE Report

Position Control Headcount Report

To compare the current headcount for your positions with the budgeted headcount for the next fiscal year, print the Position Control Headcount report. Use this information to determine whether you need to do either of the following:

- Hire additional employees to fill a position.
- Request approval for additional headcount for a position.

See Also

- R081440, *Position Control Headcount* in the *Reports Guide* for a report sample

Position Control Budgeted FTE Report

To review current position activity and compare it with the FTEs budgeted for the upcoming fiscal year, print the Position Control Budgeted FTE report. Use the information to determine whether you need to do either of the following:

- Hire additional employees to fill a position.
- Request approval for additional FTEs for a position.

Current headcount is a total of all FTEs in a position. Changes are calculated as the difference between current headcount and the next year's budgeted FTE. This report displays the new position amount as the number of FTEs that would have to be hired for current headcount to match the budgeted headcount. This report also displays the ratio of new positions to current headcount.

See Also

- R081440, *Position Control Budgeted FTE* in the *Reports Guide* for a report sample

Position Control Effective FTE Report

To review current position activity and compare it with the effective FTEs for a specific fiscal year, print the Position Control Effective FTE report. This report is the same as the Position Control Budgeted FTE report, except that it uses effective FTEs instead of budgeted FTEs.

See Also

- R081440, *Position Control Effective FTE* in the *Reports Guide* for a report sample

Processing Options for Position Control Comparison

FTE/Headcount

1. Enter the fiscal year (two digits) whose budgeted FTE or Headcount will be compared to the current FTE or Headcount. _____
2. Enter the Type of report you would like to see. Blank (default) = FTE, 1 = Headcount _____
3. For the FTE report which you would like to see Effective or Budgeted amounts. Blank (default) = Effective, 1 = Budgeted _____

Reviewing the Position Budgets Report

From the Daily Processing menu (G08BP1), choose Position Budgets.

To review by fiscal year the position budgets that are established for all business units and positions, print the Position Budgets report. Use this information to verify that your position budgets are correct. You might also use this information for reference when you are preparing your position budgets for next year. You can print one version of this report to review annual position budgets and another to review effective position budgets.

See Also

- R081460, *Position Budget* in the *Reports Guide* for a report sample
- R081460, *Effective Budget* in the *Reports Guide* for a report sample

Processing Options for Position Budgets

Pos Control

1. Would you like to run the report for budgeted or Effective amounts. Blank (default = Effective Amounts, 1 = Budgeted Amounts.

Reviewing the Employee Position Activity Report

From the Daily Processing menu (G08BP1), choose Employee Position Activity.

To review all of the position activity for each employee within your organization, print the Employee Position Activity report. You can analyze employee movement among positions and determine whether you need to hire additional employees or reduce the headcount for a position.

You can choose to sort this report either by employee last name or by employee number.

Data Selection

You should specify only one fiscal year for this report. Do not specify a range. If you specify a range of fiscal years, the report does not indicate which records are associated with each fiscal year.

See Also

- R081480, *Employee Position Activity* in the *Reports Guide* for a report sample

Reviewing the Position Budgets by Job Type and Step Report

From the Daily Processing menu (G08BP1), choose Position Budgets by Job Type and Step.

To review by fiscal year the position budgets for all business units and positions for each job type and job step within your organization, print the Position Budgets by Job Type and Step report. Use this information to verify that your position budgets are correct. You might also use this information for reference when you are preparing your position budgets for next year.

See Also

- R081470, *Position Budgets by Job Type and Step* in the *Reports Guide* for a report sample

Processing Options for Position Budgets by Job Type and Step

Budget

1. Enter "0" or leave blank to show Effective Amounts, or "1" to show Budgeted Amounts

Appendices

Appendix A: Partner Processes – Criterion BluePrint

The Criterion BluePrint Human Resource planning system automates processes such as training, career development, and succession planning.

You can integrate OneWorld with Criterion BluePrint by loading job, position, and employee information from OneWorld into Criterion BluePrint.

Integrating OneWorld with Criterion BluePrint consists of the following tasks:

- Setting up flat file cross-references for Criterion BluePrint
- Exporting OneWorld data to Criterion BluePrint

For information about using Criterion BluePrint, consult the Criterion BluePrint documentation.

Before You Begin

- Turn on the Criterion BluePrint module in OneWorld System Setup (P99410). See *Setting Up System Controls* in the *HR and Payroll Foundation Guide*.
- Verify that the codes listed under *Transaction and User Defined Codes for Criterion BluePrint* are set up in user defined code list 00/TT. All of the transaction codes should have a 1 in the Special Handling column and a Y in the Hard Coded column. See *Setting Up User Defined Codes* in the *HR and Payroll Foundation Guide*.

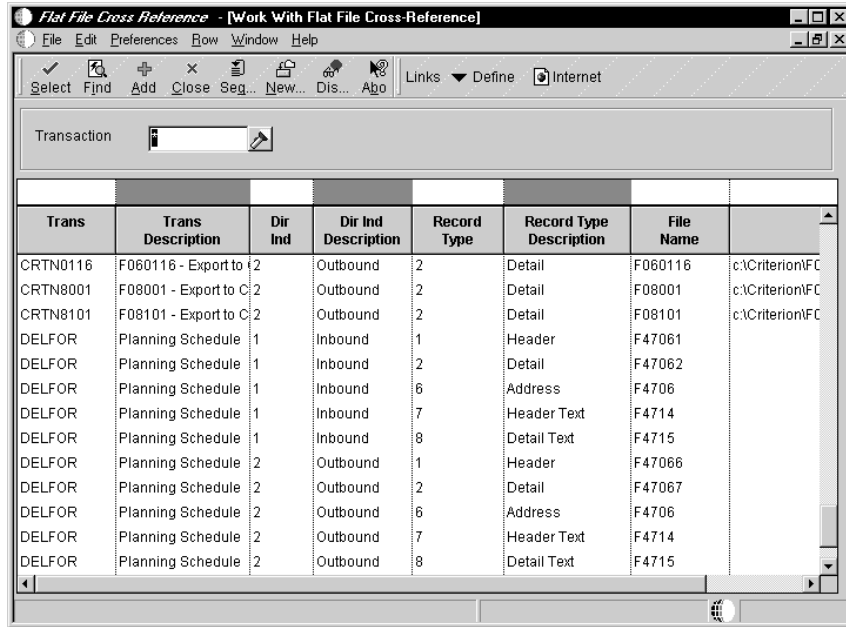
Setting Up Flat File Cross-References for Criterion BluePrint

When you export OneWorld data to Criterion BluePrint, the system stores the data in flat files. Criterion BluePrint then retrieves the data from the flat files. You need to set up flat file cross-references to indicate what file each type of data is stored in.

To set up flat file cross-references

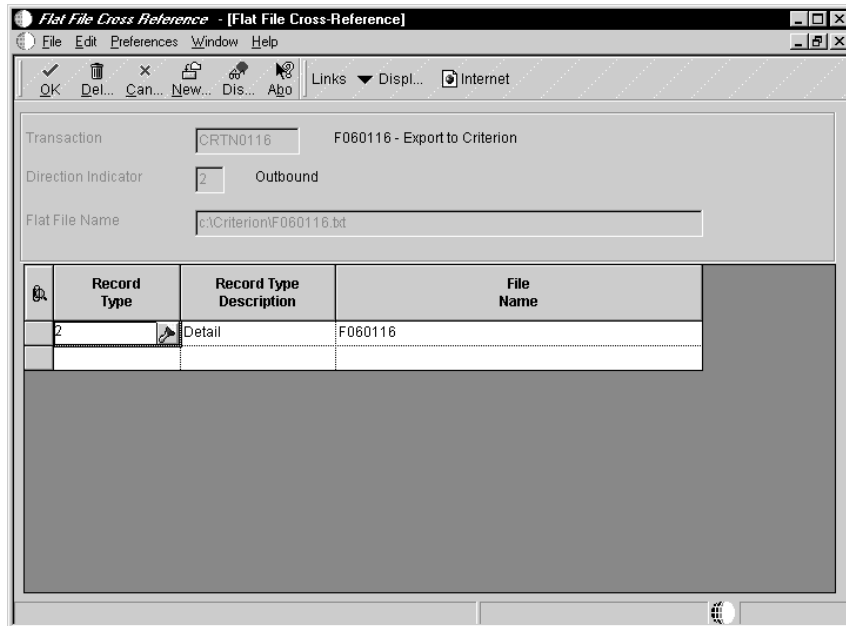
On the Criterion menu (G05BPP42), choose Flat File Cross Reference.

On Work With Flat File Cross-Reference



A sample of the code you need to set up is supplied. However, you need to delete each code and then re-create it so that you can identify the filename of the flat files.

1. Click Add.



2. On Flat File Cross-Reference, type a transaction or user defined code in the following field:
 - Transaction
3. Type 2 in the following field:

- Direction Indicator
4. Type a filename for the flat file that the data will be exported to in the following field:

- Flat File Name



Any folders in the filename path *must* already exist. OneWorld will not create the folders. Also, use double backslashes (\\) in the filename (for example, c:\\Criterion\\F060116.txt).

5. Type 2 in the following field:
- Record Type
6. Type Detail in the following field and click OK:
- Record Type Description
7. Complete steps 2 through 6 for each transaction code and user defined code that is listed under *Transaction and User Defined Codes for Criterion BluePrint*.

Field	Explanation
Transaction	A code that identifies a transaction by type.
Direction Indicator	A code that indicates the direction of the transaction.
Flat File Name	The name of the flat file. This includes the directory path where the flat file exists.
Record Type	A user defined name or remark.
Record Type Description	The identifier used to mark EDI transaction records as header and detail information. This is an EDI function only.

Transaction and User Defined Codes for Criterion BluePrint

The following transaction and user defined codes represent the data that is transferred from OneWorld to Criterion BluePrint. Use these codes to set up flat file cross-references.

- CRTN0116 – Export Employees to Criterion
- CRTN8001 – Export Jobs to Criterion
- CRTN8101 – Export Positions to Criterion
- UDCADDS – State
- UDCAT1 – Search Type
- UDCCTR – Country Code
- UDCEEOJ – EEO Job Category
- UDCEEOM – Ethnic Code

- UDCEST – Employment Status
- UDCFLSA – Overtime Exempt
- UDCJBCD – Job Type
- UDCJBST – Job Step
- UDCJGRP – Job Group
- UDCJSTA – Job Status
- UDCLNGP – Language Preference
- UDCMAIL – Check Route Code
- UDCMSTX – Marital Status
- UDCP001 – Category Code 1
- UDCP002 – Category Code 2
- UDCP003 – Category Code 3
- UDCP004 – Category Code 4
- UDCP005 – Category Code 5
- UDCP006 – Category Code 6
- UDCP007 – Category Code 7
- UDCP008 – Category Code 8
- UDCP009 – Category Code 9
- UDCP010 – Category Code 10
- UDCP011 – Category Code 11
- UDCP012 – Category Code 12
- UDCP013 – Category Code 13
- UDCP014 – Category Code 14
- UDCP015 – Category Code 15
- UDCP016 – Category Code 16
- UDCP017 – Category Code 17
- UDCP018 – Category Code 18
- UDCP019 – Category Code 19
- UDCP020 – Category Code 20
- UDCPAST – Pay Status
- UDCPRFQ – Pay Frequency
- UDCRCCD – Record Type
- UDCSALY – Pay Class
- UDCSEX – Gender

- UDCSHFT – Shift Code
- UDCLOC – Locality
- UDCTYC – Emer Contact Type
- UDCUN – Union

Exporting OneWorld Data to Criterion BluePrint

You can export the following items from OneWorld for use in Criterion BluePrint:

- Employee information
- Position information
- Job information
- User defined codes

OneWorld stores data in flat files, which you can import in Criterion BluePrint.

You need to export this data only once, when you first start using OneWorld with Criterion BluePrint. After the initial export, whenever you change or add employees, positions, or jobs in OneWorld, the data will automatically be exported to Criterion BluePrint by means of database triggers on the respective tables.

▶ To export data to Criterion BluePrint

1. Access the Criterion menu (G05BPP42).
2. Run Export to Criterion All Files.
3. Run Export User Defined Codes for version ZJDE0001 through version ZJDE0043.

This process creates a separate file for each of the data items, as defined in the Flat File Cross-Reference setup.

After you export the data from OneWorld, you need to import it in Criterion BluePrint. See the Criterion BluePrint documentation for more information.

Processing Options for Export to Criterion – All Files

Position Cntrl

Enter '1' if you are using
Position control

Processing Options for Export User Defined Codes

Process

1. Enter the Data Item from the OneWorld System Control table (F99410) you wish to process. Blanks not allowed. _____
2. Enter the Transaction Type. Blanks not allowed. _____
3. Enter the delimiter you wish to use. _____
4. Enter a '1' if you wish the code to be exported according to the code length. If left blank, the code will be exported to the length of the field. _____
5. Enter a '1' to export a blank value if blanks exist in the UDC you are exporting. _____

Appendix B: Partner Processes – Personic Workflow

Personic Workflow is an easy-to-use software package that automates the recruiting and hiring process. It can intelligently search scanned resumes, allowing you to narrow your applicant pool according to specific criteria. For example, if you want to look only at applicants with moderate Japanese skills, you can search for those resumes. After you have selected several qualified applicants, Personic Workflow guides you through the process of interviewing and hiring.

You can integrate OneWorld with Personic Workflow by loading requisitions and other data from OneWorld into Personic Workflow. Personic Workflow then helps you find qualified applicants and guides you through the interview process. Then, when you are ready to hire an applicant, you can return the applicant's information to the Employee Master records in OneWorld.

You can set a processing option to have the system automatically purge pending employees when you run Processing Pending Employees (R060116P).

Integrating OneWorld with Personic Workflow consists of the following tasks:

- Setting up Flat File Cross-References for Personic Workflow
- Exporting OneWorld data to Personic Workflow
- Importing new employee information from Personic Workflow

For information about using Personic Workflow, consult the Personic Workflow documentation.

Before You Begin

- Turn on the Personic Workflow module in OneWorld System Setup (P99410). See *Setting Up System Controls* in the *HR and Payroll Foundation Guide*.
- Verify that the codes listed under *Transaction and User Defined Codes for Personic Workflow* are set up in user defined code list 00/TT. All of the codes, except for F060116z – Import from Personic, should have a 1 in the Special Handling column. See *Setting Up User Defined Codes* in the *HR and Payroll Foundation Guide*.

Setting Up Flat File Cross-References for Personic Workflow

When you transfer data between OneWorld and Personic Workflow, the system stores the data in flat files. You need to set up flat file cross-references to indicate what file each type of data is stored in.

► **To set up flat file cross-references**

On the Personic menu (G05BPP41), choose Flat File Cross Reference.

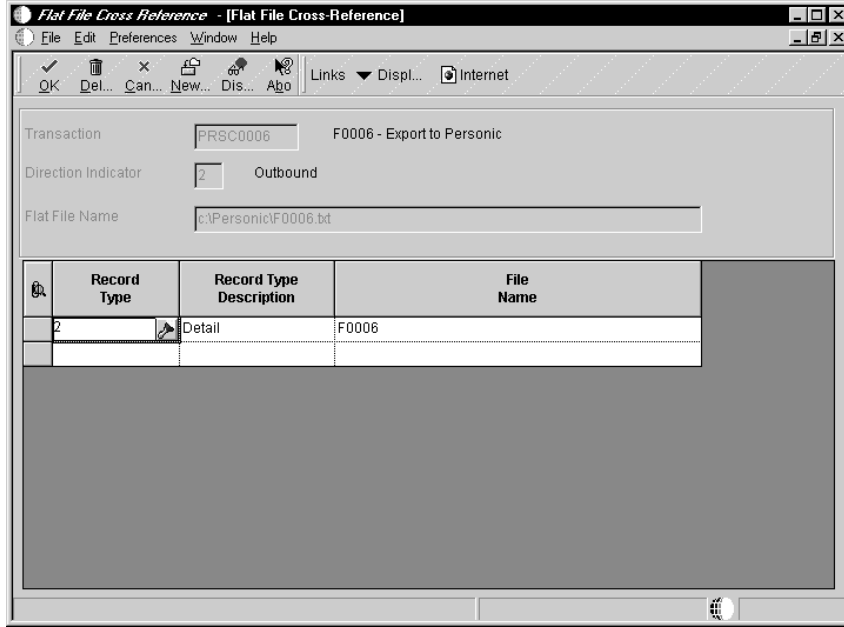
On Work With Flat File Cross-Reference

The screenshot shows a window titled 'Flat File Cross Reference - [Work With Flat File Cross-Reference]'. It contains a table with the following data:

Trans	Trans Description	Dir Ind	Dir Ind Description	Record Type	Record Type Description	File Name
PRSC0006	F0006 - Export to Pe	2	Outbound	2	Detail	F0006
PRSC0116	F060116 - Export to I	2	Outbound	2	Detail	F060116
PRSC116Z	F060116z - Import fr	1	Inbound	1	Header	F060116Z
PRSC2001	F082001 - Export to I	2	Outbound	2	Detail	F082001
PRSC8001	F08001 - Export to P	2	Outbound	2	Detail	F08001
PRSC8101	F08101 - Export to P	2	Outbound	2	Detail	F08101
PRSC8102	F08102 - Export to P	2	Outbound	2	Detail	F08102
REQUOT	Request for Quote	1	Inbound	1	Header	F47091
REQUOT	Request for Quote	1	Inbound	2	Detail	F47092
REQUOT	Request for Quote	1	Inbound	5	SDQ	F47093
REQUOT	Request for Quote	1	Inbound	6	Address	F4706
REQUOT	Request for Quote	1	Inbound	7	Header Text	F4714
REQUOT	Request for Quote	1	Inbound	8	Detail Text	F4715

A sample of the codes you need to set up is supplied. However, you need to delete each code and then re-create it so that you can identify the filename of the flat files.

1. Click Add.



2. On Work with Flat File Cross-Reference, type a transaction or user defined code in the following field:
 - Transaction
3. Type 2 in the following field:
 - Direction Indicator
4. Type a filename for the flat file that the data will be exported to in the following field:
 - Flat File Name



Any folders in the filename path *must* already exist. OneWorld will not create the folders. Also, use double backslashes (\\) in the filename (for example, c:\\Personic\\F08001.txt).

5. Type 2 in the following field:
 - Record Type
6. Type Detail in the following field and click OK:
 - Record Type Description
7. Complete steps 2 through 6 for each transaction code that is listed under *Transaction and User Defined Codes for Personic Workflow*.

Field	Explanation
Transaction	A code that identifies a transaction by type.
Direction Indicator	A code that indicates the direction of the transaction.

Field	Explanation
Flat File Name	The name of the flat file. This includes the directory path where the flat file exists.
Record Type	A user defined name or remark.
Record Type Description	The identifier used to mark EDI transaction records as header and detail information. This is an EDI function only.

Transaction and User Defined Codes for Personnic Workflow

The following transaction and user defined codes represent the data that is transferred between OneWorld and Personnic Workflow. Use these codes to set up flat file cross-references.

- PRSC0006 – F006 Export
- PRSC0116 – F060116 Export
- PRSC116Z – F060116Z Import from Personnic
- PRSC2001 – F082001 Export
- PRSC8001 – F08001 Export
- PRSC8101 – F08101 Export
- PRSC8102 – F08102 Export
- UDCADDS – State
- UDCCTR – Country Code
- UDCEEOJ – EEO Job Category
- UDCEEOM – Ethnic Code
- UDCJBCD – Job Type
- UDCJBST – Job Step
- UDCMAIL – Check Route Code
- UDCREQS – Requisition Status
- UDCSALU – Prefix
- UDCSUFF – Suffix

Exporting OneWorld Data to Personnic Workflow

You can export the following items from OneWorld for use in Personnic Workflow:

- Managers
- Requisitions
- Cost centers

- Jobs
- Pay grades/steps
- Positions
- User defined codes

OneWorld stores data in flat files, which you can import in Personic.

You may need to export this data only once, when you first start using OneWorld with Personic Workflow. After the initial export, any new or changed requisitions in OneWorld will be sent to Personic Workflow by means of database triggers. However, if you add other new items, such as managers or cost centers, in OneWorld, you must export those items to Personic Workflow again.

To export data to Personic Workflow

1. Access the Personic menu (G05BPP41).
2. Run Export Requisitions and Employees/Personic.
3. Run Outbound Cost Center Extraction to export the cost centers to a working file.
4. Run Export Cost Centers to Personic to move the cost centers to the flat file.
5. Run Export Jobs to Personic.
6. Run Export Pay Grades to Personic.
7. Run Export Positions to Personic.
8. Run Export UDCs to Personic for each of the following codes:
 - ZJDE0021 (MAIL)
 - ZJDE0022 (CTR)
 - ZJDE0023 (EEOJ)
 - ZJDE0026 (EEOM)
 - ZJDE0030 (JBST)
 - ZJDE0031 (JBCD)
 - ZJDE0042 (ADDS)
 - ZJDE0044 (REQS)
 - ZJDE0045 (SALU)
 - ZJDE0046 (SUFF)

This process creates a separate flat file for each data item and user defined code, as defined in the Flat File Cross Reference setup.

After you export the data from OneWorld, you need to import it in Personic Workflow. See the Personic Workflow documentation for more information.

Processing Options for Export Pay Grades to Personnic

Date

Enter effective date

Date - Effective On _____

Processing Options for Export User Defined Codes

Process

1. Enter the Data Item from the OneWorld System Control table (F99410) you wish to process. _____

Blanks not allowed.

2. Enter the Transaction Type. _____

Blanks not allowed.

3. Enter the delimiter you wish to use. _____

4. Enter a '1' if you wish the code to be exported according to the code length. If left blank, the code will be exported to the length of the field. _____

5. Enter a '1' to export a blank value if blanks exist in the UDC you are exporting. _____

Importing New Employee Information from Personnic Workflow

When you have indicated a hire date for the successful applicant in Personnic Workflow, you can import that applicant's information (such as name, address, and so on) into OneWorld, where it is added directly to a pending employee table. From there, the applicant's information is transferred to the Employee Master file.

Before You Begin

- Export the appropriate records from Personnic Workflow. See the Personnic Workflow documentation for more information.

► To import new employee information

On the Personnic menu (G05BPP11)

1. Run Inbound Flat File Conversion, version XJDE0022, to load the flat file into a pending employee table.
2. Choose Employee Work File Revisions, and then make any necessary additions, changes, and deletions in the employee records.

3. Run Process Pending Employees to transfer the records to the Employee Master table.

Processing Options for Inbound Flat File Conversion

Transaction

1. Enter the transaction to process.

Separators

1. Enter the field delimiter.3333
2. Enter the text qualifier.

Process

1. Enter the inbound processor to run after successful completion of the conversion.
2. Enter the version for the inbound processor. If left blank, XJDE0001 will be used.

Processing Options for Process Pending Employees

Defaults

1. Security Business Unit 1 = Default Security Business Unit
0 = Do not default
2. Tax Areas 1 = Fields required
0 = Fields not required
3. Job Information 1 = Default Job Information
0 = Do not default
4. Job Category Codes 1 = Default Job Category Codes
0 = Do not default
5. Country Code Enter UDC Code
6. Contact Type Enter UDC Code
7. Home Phone Type Enter UDC Code

8. Work Phone Type Enter UDC Code

Versions

1. Applicant Information Version
 tax areas to be left blank otherwise
 require manual entry of tax areas.

2. Address Book MBF Version

Action

1. Update Master Files 1 = Update
 Employee Master and Address Book
 0 = Do not update

2. Purge successfully processed records
 1 = Purge 0 = Do not purge
 will not be included.

Country

1. Enter default Country Code

 Country Code

Contacts

 1. Emergency Contact Type

Phone Types

- 1. Home Phone Type
- 2. Work Phone Type

Action

1. Enter '1' to edit and direct updates
 to Employee Master and Address Book,
 enter blank if you do not want to
 update Master files.

 Update Master Files

Enter '1' to purge successfully
processed records, otherwise they
will not be purged.

 Purge Processed Records

Glossary

Glossary

1040 form. The form approved by the Internal Revenue Service for filing individual income tax information.

1099 form. An income tax reporting form required by the U.S. government for many types of payments made to persons and noncorporate entities.

accounting period. One of the divisions of a fiscal year. A fiscal year can contain 12 to 14 accounting periods or, more rarely, 52 periods. There can also be an additional period for year-end adjustments and another additional period for audit adjustments.

accrual. A monetary amount or number of hours that employees can accumulate over time. Accruals can be compounded by employees and used at a later date. Examples of accruals are vacation leave and sick time.

adjusted wages. The amount of wages (taxable plus adjustments) that are reported on the year-end form and for which the employee must pay taxes.

adjustments. The various amounts processed for the employee such as pay, deductions, and benefits. Each adjustment either was not included in the taxable wage amount for the pay period or is an amount that must be reported to the IRS even though it was previously included in the taxable wage. In the first case, the employee is deemed responsible for the tax, so it must be added back to the taxable wage.

allocated tips. An amount that the IRS has determined to be taxable to the employee even though the employee did not receive the amount in the form of a wage. Allocated tips are calculated based on the actual tips that the employee claimed, not the tips based on the IRS 8% rule.

allocated wages. The amount of federal adjusted wages and tax that has been allocated across all states in which the employee worked.

applicant. A person who applies for a job with an organization and who does not currently work for that organization.

application. A computer program or set of programs used to accomplish a task. In OneWorld, there are interactive applications and batch applications. Interactive applications are made up of a set of forms through which the user interacts with OneWorld. Interactive application identifiers begin with "P." For example, Address Book Revisions (P01012) is an interactive application. Batch applications run without user interaction. Reports and table conversions are examples of batch applications. Batch application identifiers begin with "R." For example, the Print Mailing Labels report (R01401) is a batch application.

arrearage. An past due amount. Typically, an arrearage is an amount that the Payroll system could not deduct from an employee's pay because the employee did not earn enough to pay for the deduction.

arreared taxes. The amount of payroll tax that could not be withheld from an employee's paycheck because of a condition such as negative net pay. To track arreared taxes, you must tell the system to do so. It does not automatically generate these amounts.

as of report. A report that lists information from history tables in summary or detail for a specific point in time.

audit trail. The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records and usually concludes with a report.

automatic accounting instruction (AAI). A code that refers to an account in the chart of accounts. AAIs define rules for programs that automatically generate journal entries, including interfaces between the Accounts Payable, Accounts Receivable, Financial Reporting, and General Accounting systems. Each system that interfaces with the General Accounting system has AAIs. For example, AAIs can direct the General Ledger Post program to post a debit to a specific expense account and a credit to a specific accounts payable account.

automatic deposit advice slip. See payment.

base state. The state in which an employee resided during the tax-reporting year. The system generates a state and local control record for each employee regardless of whether the employee worked in a state that levies taxes. This state record provides the federal information that prints on the employee's year-end form if you choose to print only one state on each form.

batch control. A feature that verifies the number of transactions and the total amount in each batch that you enter into the system.

batch input. A group of transactions loaded from an external source.

batch job. A task or group of tasks you submit for processing that the system treats as a single unit during processing, for example, printing reports and purging files. The system performs a batch job with little or no user interaction.

batch processing. A method by which the system selects jobs from the job queue, processes them, and sends output to the outqueue. Contrast with interactive processing.

batch type. A code assigned to a batch job that designates to which system the associated transactions pertain, thus controlling which records are selected for processing. For example, the Post General Journal program selects for posting only unposted transaction batches with a batch type of O.

beneficiary. The person for whose benefit a trust is created or designated to receive the proceeds or benefits accruing from an annuity or insurance policy.

benefit. Something that employees receive as part of their total compensation for working for an organization. Examples of benefits include group medical insurance, paid vacations, and 401(k) plans.

benefit group. A group of employees who, for benefit enrollment purposes, have access to the same benefit plans. For example, you can set up benefit groups for salaried workers, hourly workers, and executives.

benefit plan. A plan that provides additional compensation for employees. Examples of benefit plans include health insurance, 401(k), and profit sharing plans.

broadcast message. 1) An e-mail message that you send to multiple recipients. 2) A message that appears on a form instead of in your mailbox.

business unit. A division of your business organization that requires a balance sheet or profit-and-loss statement. Also known as a cost center.

candidate. A person who applies for a job with your organization. A candidate can be either an employee (a person who currently works for your organization) or an applicant (a person who does not currently work for your organization).

category code. A type of user defined code for which you can provide the title. For example, if you were adding a code that designated different sales regions, you could change category code 4 to Sales Region, and define E (East), W (West), N (North), and S (South) as the valid codes. Sometimes referred to as reporting codes. See also user defined code.

chart of accounts. The structure for general ledger accounts. The chart of accounts lists types of accounts, describes each account, and includes account numbers and posting edit codes.

check. See payment.

COBRA. An acronym for Consolidated Omnibus Budget Reconciliation Act. A law that requires most employers who sponsor group health plans to offer employees and their dependents continuation of coverage at the group rates that the employee would otherwise have forfeited due to a qualifying event. Federal and state agencies regulate COBRA coverage.

coexistence. An AS/400 environment in which similar features and functions of WorldSoftware and OneWorld software access the same database.

compa-ratio. An employee's salary divided by the midpoint amount for the employee's pay grade.

consolidation. A method of grouping or combining financial information for several companies or business units. Consolidation is used for budgeting, inquiries, and reports.

constants. Parameters or codes that you set and that the system uses to standardize the processing of information by associated programs.

corporate tax ID. The number assigned to the taxing authority for the governmental agency in which an employee is working.

cost allocations. A procedure that distributes expenses, budgets, adjustments, and so on among business units, based on actual numbers.

cost center. See business unit.

customer. An individual or organization that purchases goods and services.

data dictionary. A database table that OneWorld uses to manage the definitions, structures, and guidelines for the usage of fields, messages, and help text. J.D. Edwards has an active data dictionary, which means that it is accessed at runtime.

data types. Categories in which you can track supplemental information for employees, applicants, jobs, and requisitions. Narrative data types contain free-form text. Code data types are based on user defined code tables.

database. A continuously updated collection of all information that a system uses and stores. Databases make it possible to create, store, index, and cross-reference information online.

deduction. A monetary amount that is taken out of an employee's pay. For example, a deduction can be used to contribute toward a benefit plan, such as life or medical insurance.

deduction, benefit, and accrual (DBA). See individual entries for deduction, benefit, and accrual.

default. A code, number, or parameter that the system supplies when the user does not specify one.

deferred compensation. An amount withheld from an employee's payment for the purpose of retirement savings. Deferred compensation is taxed at a later time, generally after the employee retires.

detail. The specific information that makes up a record or transaction. Contrast with summary.

detail area. An area of a form that displays detailed information associated with the records or data items displayed on the form. See also grid.

display sequence. A number that the system uses to reorder a group of records on a form.

document number. A number that identifies the original document, such as voucher, invoice, unapplied receipt, journal entry, and so on.

e-mail. Electronic mail.

effective date. The date upon which an address, item, transaction, change, or table becomes effective. For example, the date a change of address becomes effective or the date that a pay change becomes effective. Effective dates allow you to track employee history and turnover.

Electronic Data Interchange (EDI). The paperless, computer-to-computer exchange of business transactions, such as purchase orders and invoices, in a standard format with standard content.

employee. A person who works for and is paid by your organization.

employee history. Historical records that show changes to employee information. You can track employee history for any of the information stored in the Employee Master table (F060116).

employee turnover. Records of employee movement within your organization, such as when an employee receives a promotion or transfers from one department to another. Movement also includes employees entering or leaving your organization for any reason. You can track employee turnover for any of the information stored in the Employee Master table (F060116).

Enterprise Workflow Management. A OneWorld system that provides a way of automating tasks, such as notifying a manager that a requisition is waiting for approval, using an e-mail-based process flow across a network.

ERISA. An acronym for Employee Retirement Income Security Act of 1974. A law that is designed to protect the interests of employees who participate in employer-sponsored benefit plans and the beneficiaries of those employees. The law establishes standards of conduct, responsibility, and obligations for fiduciaries of employee benefit plans. The law also specifies rules for participation in benefit plans, vesting of benefits, and funding for new and existing plans. Additionally, it provides employees with appropriate remedies, sanctions, and access to federal courts.

facility. An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit.

field. 1) An area on a form that represents a particular type of information, such as name, document type, or amount. 2) A defined area within a record that contains a specific piece of information. For example, a supplier record consists of the fields Supplier Name, Address, and Telephone Number.

file. A set of information stored under one name. See also table.

fiscal year. A company's tax reporting year. Retained earnings are generally calculated at the end of a fiscal year. It is often different from a calendar year. For example, a fiscal year might be the period from October 1 through September 30.

form. The element of the OneWorld graphical user interface by which the user exchanges data with interactive applications. Forms are made up of controls, such as fields, options, and the grid. These controls allow the user to retrieve information, add and revise information, and navigate through an application to accomplish a task.

functional server. A central system location for standard business rules about entering documents such as vouchers, invoices, and journal entries. Functional servers ensure uniform processing according to guidelines you establish.

G/L. General ledger.

grid. A control that displays detail information on a form. The grid is arranged into rows, which generally represent records of data, and columns, which generally represent fields of the record. See also detail area.

gross up. The process by which the Payroll system calculates gross wages from net pay. For example, you can use the gross up feature to determine the gross amount of a bonus paycheck that produces 500.00 net payment for the employee.

head count. The number of people in a position.

header. Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.

highly compensated employee (HCE). A distinction made for 401(k) discrimination testing. A highly compensated employee is one who meets one of the following criteria: 1) During the current year or the preceding year, the employee owned at least five percent of the company. 2) During the preceding year, the employee earned more than

80,000 (indexed for inflation) and was in the top 20% of employees ranked by compensation.

HIPAA. An acronym for Health Insurance Portability and Accountability Act. A federal law that prohibits health insurance companies from denying employees coverage or charging them higher premiums because of their medical condition. The act also requires that insurance companies allow terminated employees to continue their medical coverage.

history. See employee history.

integrity test. A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.

interactive processing. Processing actions that occur in response to commands that you enter directly into the system. During interactive processing, you are in direct communication with the system, and it might prompt you for additional information while processing your request. Contrast with batch processing.

job. An employee's work duties and responsibilities.

job queue. A group of jobs waiting to be batch processed. See also batch processing.

language preference. An address book code that specifies a language for the computer to use when displaying information.

locked record. A record in the database that you cannot update because it is currently being updated by another user. For example, when you are processing a payroll cycle, record locking prevents other users from changing timecard information for the employee records that are included in the payroll cycle.

mail distribution list. A list of people to whom you send e-mail messages. This list enables you to quickly send notices, instructions, and requests to a predefined group of people.

master business function. A central system location for standard business rules about entering documents such as vouchers, invoices, and journal entries. Master business functions ensure uniform processing according to guidelines that you establish.

master table. A database table used to store data and information that is permanent and necessary to

the system's operation. Master tables might contain data, such as paid tax amounts, supplier names, addresses, employee information, and job information.

menu masking. A security feature that lets you prevent individual users from accessing specified menus or menu selections.

next numbers. A feature used to control the automatic numbering of items such as new G/L accounts, vouchers, and addresses. Next numbers provides a method of incrementing numbers.

nonprimary record. A record representing the various companies that make up the primary record. When tax ID summarization occurs, all companies with the same federal corporate tax ID are summarized together under one parent. See also primary record.

OASDI. An acronym for Old Age, Survivors, and Disability Insurance. The legal terms for the Federal Insurance Contributions Act (FICA), commonly known as Social Security.

option. A selection on a form that performs a particular function or task.

original document. The document that initiates a transaction in the system.

OSHA. An acronym for Occupational Safety and Health Administration. An agency that assists states in establishing safe and healthful working conditions for employees.

output queue. See print queue.

parameter. A number, code, or character string you specify in association with a command or program. The computer uses parameters as additional input or to control the actions of the command or program.

parent/child relationship. A hierarchical relationship among the individuals within your organization. This relationship is helpful when you need to provide executives and managers with a summary of the reporting relationships within your organization. You can define parent/child relationships either by employee (address number) or by position.

pay status. The current condition of the payment or receipt, such as paid or payment-in-process.

pay type. A method of categorizing the various types of earnings that employees receive. You use

pay types to direct labor costs to separate accounts in the general ledger.

payment. A form that employees receive when they get paid, such as a check or an automatic deposit advice slip.

payroll cycle. The process that you complete to pay your employees. The payroll cycle consists of the following five steps: 1) Process pre-payroll, 2) Print payments, 3) Process pro forma journal entries, 4) Print payroll cycle reports, and 5) Process final update.

position. An employee's assignment for a fiscal year.

position budget. The amount of money budgeted for an employee's assignment for a fiscal year. You define a position budget to establish, monitor, and control budgets for employee assignments.

pre-note code. A code that indicates whether an employee is set up for automatic deposit of payments.

primary record. The record that is used for printing reports and forms. The primary record is created under one of two circumstances: 1) If you have requested tax ID summarization not to occur, all company-level records automatically become primary and no nonprimary records exist. This happens even if the federal corporate tax ID is the same for multiple companies. 2) If you have requested tax ID summarization to occur, all companies with the same federal corporate tax ID are summarized together under one parent company number, and the individual companies that made up the primary record automatically become nonprimary records. All other companies with unique federal corporate tax IDs automatically become primary. See also nonprimary record.

print queue. A list of tables, such as reports, that you have submitted to be written to an output device, such as a printer. The computer spools the tables until it writes them. After the computer writes the table, the system removes the table identifier from the print queue.

processing option. A feature that allows you to direct the functions of a program. For example, processing options allow you to specify defaults for certain forms, control the format in which information prints on reports, and change how information appears on a form or in a report.

PST. An acronym for provincial sales tax. A tax assessed by individual provinces in Canada.

purge. The process of removing records or data from a system table.

record. A collection of related, consecutive fields of data that the system treats as a single unit of information.

requisition. A record or document that contains information about an open position. You enter a requisition to begin the process of filling a vacancy within your organization.

reset. To return data to the way it was before you ran a process, such as pre-payroll. Resetting allows you to correct information and then run the process again.

routing/transit number. A number that uniquely identifies U.S. banks. This number is assigned by the Federal Reserve Board. The routing/transit number consists of two parts: a routing number and a transit number.

RRSP. An acronym for Registered Retirement Savings Plan. A Canadian national retirement plan, similar to the Social Security plan in the United States, which is funded by payroll taxes.

school district tax. Generally, a payroll tax based on the school district in which the employee lives.

sequence ID. A code that defines the order in which payments print in a payment group. Each sequence ID has its own data sequence and a code that indicates whether the system sorts each data item in ascending or descending order.

SIC. An acronym for standard industry classification. A U.S. government code that classifies U.S. companies according to their economic activity. Examples include agricultural services (0100), wholesale trade (5000), and services (7000).

special handling codes. The IRS-reserved codes that are printed in boxes 13 and 14 on W-2 and W-2c forms.

special period/year. The date that determines the source balances for an allocation.

speed code. A user defined code that represents a G/L account number. You can use speed codes to simplify data entry by making G/L accounts easier to remember.

spool. The function by which the system stores generated output to await processing.

stop date. The date that an allocation becomes inactive.

structure type. A code that identifies a type of organizational structure with its own hierarchy in the Address Book system.

SUI. An acronym for state unemployment insurance. A type of insurance, funded by payroll taxes, that employees might collect when they lose their jobs for certain reasons.

summary. The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many systems offer forms and reports that summarize information stored in certain tables. Contrast with detail.

supplemental data. Additional user-defined information about an employee, job, applicant, or requisition that is not included in the master tables.

system. A group of related applications identified by a name and a system code. For example, the Address Book system code is 01. All applications, tables, and menus within a system can be identified by the system code.

system code. A code that identifies a system, for example, 01 for the Address Book system and 31 for the Shop Floor Management system.

table. In database environments, a two-dimensional entity made up of rows and columns. All physical data in a database are stored in tables. See also file.

tax history type. A code that represents the various types of taxation history that can be tracked by the Payroll system. The following are the current types of history: 1) Standard tax history uses the code of blank. 2) Third-party sick pay uses code 1. 3) Retired (pension) employee uses code 2. This code is necessary to generate a 1099-R form for retired persons being paid a pension. 4) Medicare-qualified employee uses a code 3. This code is used for those employees who are taxed only on the Medicare portion of their income. 5) Noncovered employee uses code 4. This code is used for employees who are exempt from both FICA and Medicare, such as summer youth employees. 6) Contract employee uses code C. This code is necessary to generate a 1099-MISC form for a contract employee.

taxable wages. The amount of wages derived directly from the Taxation Summary History table

(F06136). The actual amount is determined by subtracting the excludable and excess amounts from the gross wages. This amount might or might not be the amount reported on the form.

tier I tax. A payroll tax calculated for employees who work for a railroad company. It is equivalent to the FICA tax withheld for nonrailroad employees.

tier II tax. A payroll tax calculated for employees who work for a railroad company. This tax is completely separate from standard FICA and Medicare taxes.

timecard. A record of an employee's hours worked. The Payroll system uses timecards to calculate the employee's pay.

transaction code. A code that specifies the type of transaction on a bank statement.

Universal Batch Engine (UBE). Processes reports and batch jobs in OneWorld.

user defined code (UDC). A code that users can define, assign code descriptions, and assign valid values. Examples of such codes are unit-of-measure codes, state names, and employee type codes.

user defined code type. The identifier for a table of codes with a meaning that you define for the system, such as ST for the Search Type codes table in Address Book. OneWorld provides a number of these tables and allows you to create and define tables of your own.

vocabulary overrides. A feature that you can use to override field, row, or column title text on forms and reports.

void. A process that creates a reversing entry for the original transaction. Voiding a transaction produces an audit trail.

W-3 form. The form approved by the Internal Revenue Service for summarizing the amounts reported on all W-2 forms. Form W-3 should accompany W-2 forms (Copy A) when you submit the paper forms to the government. Form W-3 is not for magnetic media filers. The form should be used only for employers who file paper copies of W-2s with the Social Security Administration.

W-3c form. The form approved by the Internal Revenue Service for printing the corrected earnings and taxes on reports previously filed for an employee who worked in the United States. The

W-3c form summarizes the information on the individual forms W-2c.

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