
PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook

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PeopleSoft Enterprise HRMS Application Fundamentals Preface

This preface discusses:

- PeopleSoft products.
- Additional resources.
- Deferred processing.
- Common elements used in PeopleSoft HRMS.

Note. *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook* provides you with essential information describing the setup and design of your HRMS system. For information about how to implement and process information for specific products, see the individual PeopleBooks for the appropriate HRMS application.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product suite: PeopleSoft Enterprise HRMS.

Deferred Processing

Several pages in PeopleSoft HRMS applications operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

Common Elements Used in PeopleSoft HRMS

The following common elements appear through PeopleSoft HRMS.

PeopleBooks Standard Page Element Definitions

Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.

As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also Prefecture and Parish)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and background processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID), Person ID, and ID	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate a person has more than one job data record in the system.
Fax (also Fax Number)	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.

House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee, contingent worker, person of interest, or applicant.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, contingent worker, person of interest, or applicant.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2, or Telex.
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on.)
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the background process runs. After the background process runs, the process frequency is automatically set to Don't Run. Always executes the request every time the background process runs. Don't Run ignores the request when the background process runs.
Process Monitor	Click this button to access the Process List page, where you can view the status of submitted process requests.

Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Enterprise Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report. Report Manager Click this button to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process. Run Click this button to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIDs enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also Province)	State (Province) for address.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes, Naming

The following fields appear wherever you enter or display naming information in PeopleSoft HRMS:

Format Using	Select the country with name format appropriate for this person. The system will display the appropriate fields for this format in the Person Name group box.
Refresh the Name Field	Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting workforce information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and Name Prefix	Select a prefix or name prefix, if applicable.
Royal Prefix	Select a royal prefix, if applicable.
First Name	Enter the person's official first name.
Preferred First Name	For The Netherlands, enter the person's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this person.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married people. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner, and Last Name Preference.
Middle	Enter the person's middle name, if applicable.
Last Name	Enter the person's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish persons, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the person's name using alternate characters (such as Japanese phonetic characters).

Note. You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter.

Warning! Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.

- Royal Suffix

Select the appropriate royal suffix. If you are reporting workforce information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
- Name

The system displays the person's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays "Last Name[space]First Name," not "Last Name,First Name"; that is, a space separates the last and first names, not a comma.

See Chapter 8, "Setting Up and Working with Languages," Working with Alternate Character Sets, page 193.

PeopleBook Standard Group Boxes, Pay Components

The Pay Component group box appears on many pages throughout PeopleSoft Human Resources.

Amounts Tab

Access the Amounts tab.

Pay Components								Customize Find First 1 of 1 Last	
Amounts		Controls	Changes	Conversion					
	*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group	
1	NAHRLY	0	25.000000	CAD	H				+ -

Pay Components - Amounts tab

- Rate Code

Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid.
- Seq (sequence)

The sequence number of the rate code if it is used more than once.
- Comp Rate
(compensation rate),
Currency, and
Frequency

The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
- Points

The salary points associated with this rate code, if any.

- Percent** If the rate code rate type is Percent, the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
- Rate Code Group** A rate code group enables you to be more specific when calculating percentages based components as part of your workforce compensation package.

Controls Tab

Access the Controls tab.

Pay Components									
Amounts		Controls		Changes		Conversion			
	*Rate Code	Seq	Source	Calculated By	Manually Updated	Default Without Override	Details		
1	NAHRLY	0	Manual	None	☒	☐	Details	+	-

Pay Components - Changes tab

This page displays how the person's salary was entered.

- Source** The system displays the source of the rate code, such as Absorbing Premium, Seniority Pay, Job Code, or Manual.
- Manually Updated** The system selects this if you have manually updated the pay components.
- Default Without Override** Selected if the worker's compensation package cannot be manually updated on the Job Data - Compensation page.

Changes Tab

Access the Changes tab.

Pay Components									
Amounts		Controls		Changes		Conversion			
	*Rate Code	Seq	Change Amount	Currency	Frequency	Change Points	Change Percent		
1	NAHRLY	0	0.000000	CAD	Hourly		0.000	+	-

Pay Components - Changes tab

This page displays the change in an person's salary.

- Change Amount** The overall change amount to this pay component rate.
- Change Points** The overall change amount (in points) to this pay component, if applicable.

Change Percent The overall percentage change to this pay component, if applicable.

Conversion Tab

Access the Conversion tab.

Pay Components

CustomizeFind1 of 1Last

AmountsControlsChangesConversion

	*Rate Code	Seq	Converted Comp Rate	Currency	Frequency	Apply FTE		
1	NAHRLY	0	1,500.000000	CAD	Biweekly		+	-

Pay Components - Conversion tab

This page displays the conversion rates in an person's salary.

Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the worker should normally work in the corresponding job. This field isn't available for Percent rate codes.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.

- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft Enterprise HRMS

This chapter provides an overview of PeopleSoft Enterprise HRMS and discusses:

- PeopleSoft Enterprise HRMS integrations.
- PeopleSoft Enterprise HRMS implementation.

PeopleSoft Enterprise HRMS Overview

PeopleSoft HRMS is an integrated suite of applications and business processes that are based on PeopleSoft's Pure Internet Architecture (PIA) and enterprise portal technologies.

The sophisticated features and collaborative, self-service functionality available in PeopleSoft HRMS enable you to manage your human resources from recruitment to retirement while aligning your workforce initiatives with strategic business goals and objectives.

PeopleSoft Enterprise HRMS Integrations

PeopleSoft HRMS integrates with other PeopleSoft applications, such as PeopleSoft Enterprise Financials, PeopleSoft Enterprise Workforce Analytics, and PeopleSoft Enterprise Learning Management. PeopleSoft HRMS also integrates with other third-party applications. PeopleSoft HRMS uses various integration technologies to send and receive data.

We discuss integration considerations in the implementation chapters in the PeopleBooks. Supplemental information about third-party application integrations is located on the My Oracle Support website.

PeopleSoft Enterprise HRMS Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft HRMS also provides component interfaces to help you load data from your existing system into PeopleSoft HRMS tables. Use the Excel to Component Interface utility with the component interfaces to populate tables.

This table lists all of the components documented in the *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook* that have component interfaces:

Component	Component Interface	References
Departments component (DEPARTMENT_TBL)	DEPARTMENT_TBL	See Chapter 11, "Setting Up Organization Foundation Tables," Maintaining Departments , page 299.
Establishment component (ESTABLISHMENT_DATA)	ESTABLISHMENT_DATA	See Chapter 11, "Setting Up Organization Foundation Tables," Defining Establishments , page 273.
Job Code Task Table component (JOB_CODE_TASK_TABLE)	JOB_CODE_TASK_TABLE	See Chapter 13, "Setting Up Jobs," Defining Job Tasks , page 354.
Job Code Table component (JOB_CODE_TBL)	CI_JOB_CODE_TBL	See Chapter 13, "Setting Up Jobs," Classifying Jobs , page 334.
Job Tasks component (JOB_TASK_TABLE)	JOB_TASK_TABLE	See Chapter 13, "Setting Up Jobs," Defining Job Tasks , page 354.
Location component (LOCATION_TABLE)	LOCATION_TABLE	See Chapter 11, "Setting Up Organization Foundation Tables," Establishing Locations , page 283.
FLSA Calendar Table (FLSA_CALENDAR)	FLSA_CALENDAR	See Chapter 19, "Setting Up Pay Calendars," Setting Up FLSA Calendars , page 493.
Pay Run Table (PAY_RUN_TABLE)	PAY_RUN_TABLE	See Chapter 19, "Setting Up Pay Calendars," Creating Pay Run IDs , page 486.
Tax Location Table component (TAX_LOCATION_TBL)	TAX_LOCATION_TBL	See Chapter 20, "Setting Up Company Tax Tables for North America," Defining Tax Locations , page 518.

See Also

Enterprise PeopleTools PeopleBook; PeopleSoft Setup Manager

PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components

Chapter 2

Understanding HRMS

This chapter discusses:

- Control tables, transaction tables and prompt tables.
- Business units, tablesets and setIDs.
- Effective dates.
- Person or position structure.

Note. This chapter introduces you to some of the basic concepts used through PeopleSoft HRMS.

Control Tables, Transaction Tables and Prompt Tables

PeopleSoft HRMS is a table-based system that stores critical general data, such as companies, work locations, and system specifications in a central location. The system enables users to access the same basic information while maintaining data accuracy and integrity.

Tables that are central to PeopleSoft HRMS include control tables, transaction tables, and prompt tables.

Control Tables

Control tables store information that is used to process and validate the day-to-day business activities (transactions) users perform with PeopleSoft HRMS applications.

The information stored in control tables is common and shared across an organization, for example, master lists of customers, vendors, applications, items, or charts of accounts. By storing this shared information in a central location, control tables help to reduce data redundancy, maintain data integrity, and ensure that users have access to the same basic information.

The information stored in control tables is generally static and is updated only when fundamental changes occur to business policies, organizational structures, or processing rules.

Note. Control tables are tables that include the SETID key field (setID). As you set up control tables, you'll notice that it is the setID that enables control table information to be shared across business units.

Transaction Tables

Transaction tables store information about the day-to-day business activities (transactions) users perform with PeopleSoft HRMS applications.

The information stored in transaction tables often changes and is updated more frequently than the information stored in control tables.

Note. Transaction tables are tables that include the BUSINESS_UNIT field (which may or may not be used as a key field).

Prompt Tables

Prompt tables are tables that are associated with fields on PeopleSoft application pages and which display valid data values for those fields when a user selects a prompt or search option.

The data values stored in prompt tables are retrieved from control tables, transaction tables, or other PeopleSoft tables.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Business Units, Tablesets and SetIDs

PeopleSoft regulates HRMS system data through the use of business units, tablesets, and setIDs.

Business Units

Business units are logical units that you create to track and report specific business information. Business units have no predetermined restrictions or requirements; they are a flexible structuring device that enable you to implement PeopleSoft HRMS based on how *your* business is organized.

You must define at least one business unit. The BUSINESS_UNIT field is included on all transaction tables.

Tablesets and SetIDs

Tablesets and setIDs are devices that enable you to share – or restrict – information across business units. For example, with tablesets and setIDs you can centralize redundant information such as country codes while keeping information such as departments and job codes decentralized. The overall goal of tablesets and setIDs is to minimize data redundancy, maintain data consistency, and reduce system maintenance tasks.

You must define at least one tableset (setID). The SETID key field is included on all control tables.

See Also

[Chapter 3, "Working with System Data Regulation in HRMS," page 9](#)

Effective Dates

PeopleSoft HRMS uses effective dates to store historical, current, and future information. Effective dates enable you to:

- Maintain a chronological history of your data. By storing effective-dated information in tables, the system enables you to review past transactions and plan for future events. For example, you can roll back your system to a particular time to perform historical analyses for your company. Or, you can set up tables and data ahead of time without using tickler or pending files.
- Maintain the accuracy of your data. By comparing the effective dates in prompt tables to the effective dates on application pages, the system displays only those values that are valid for the current time period. For example, you create a new department code with an effective date of May 1, 2008. Then, on the Job Data pages, you enter a new data row for an employee with an effective date *before* May 1, 2008. When you select the prompt for the department field, you won't see the new department code because it is not in effect.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

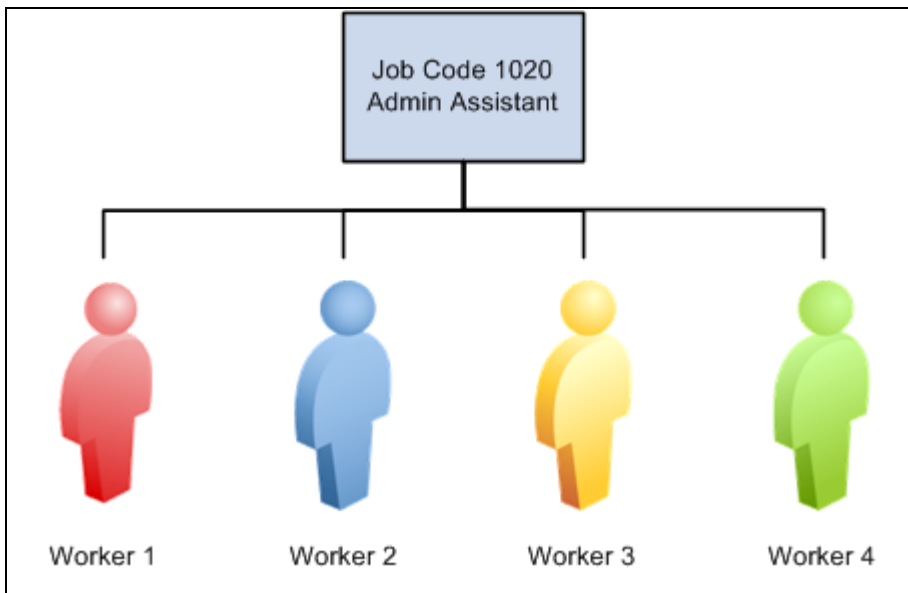
Person or Position Structure

PeopleSoft HRMS enables you to structure or drive your PeopleSoft Enterprise Human Resources system by person or by position. Before you set up information in the control tables, you must decide which method to use. The system processes the information differently depending on your choice.

What's the Difference?

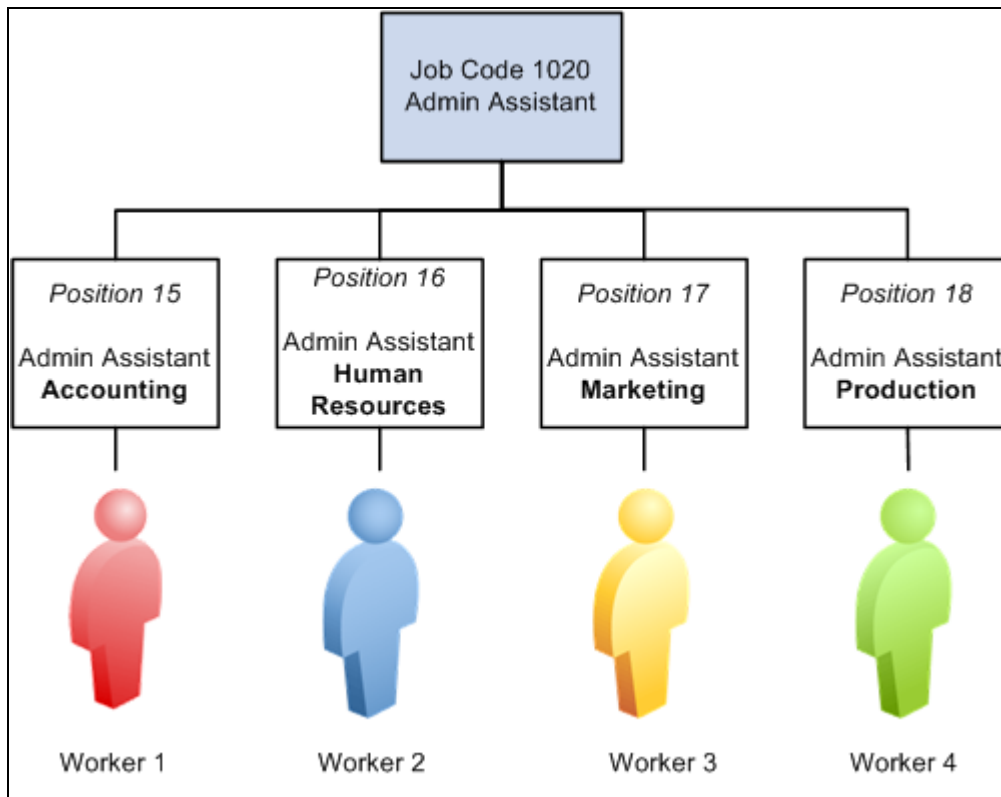
When you drive PeopleSoft Human Resources by person, you use job codes to classify job data into groups. You use those codes to link person data to job data. When you drive PeopleSoft Human Resources by position, you still use job codes to create general groups, or job classifications, in your organization, such as EEO (equal employment opportunity) and salary survey data, but you *also* uniquely identify each position in a job code and link people to those positions.

Job codes primarily have a one-to-many relationship with workers. Many workers share the same job code, even though they might perform the work in different departments, locations, or companies, as shown in the diagram below. You identify the job that a worker performs through the data that you enter in the worker's job records:



Driving HRMS by person

In contrast, positions usually have a one-to-one relationship with workers. However, you can have several positions with the same job code; positions track details of a particular job in a specific department or location. For example, in job code 1020, Administrative Assistant, you can define different administrative assistant positions with different position numbers—position 15 in accounting, position 16 in the human resources department, position 17 in your marketing department, and position 18 in your production group. Workers are then assigned to these specific positions. The following diagram represents this method:



Driving HRMS by position

When you drive your system by position, you define specific attributes of various positions and then move workers in and out of those positions. You track specific information that is related to a position, such as a phone number or mail stop, regardless of whether a person actually fills that position. And you use data that is specific to each position as the basis for organization planning, recruitment, career planning, and budgeting.

Why Does It Matter?

You won't see much difference between the two methods as you work with pages and tables, but the system processes the data differently according to whether you drive it by person or position. That affects how and where you enter and maintain data for people and positions (or jobs).

Which Method Should You Use?

To determine whether you should drive your system by person or position, consider the following:

- If your organization is fluid (that is, if you tend to look at broader groups of workers and create new jobs often), then driving the system by person is probably best for you.

This method is useful if your organization is continually expanding or if new projects require that you create new jobs or job types regularly.

- If your organization is fairly static (that is, if jobs and job descriptions are mostly fixed, and people move in and out of the same positions), then driving the system by position is probably best for you.

For example, government agencies and hospitals, which plan positions based on budgets (often well in advance of filling the positions), find this method very useful.

- If you find that both methods work well in different areas of your organization, you can drive PeopleSoft Human Resources both ways.

For example, you might find that driving the system by position works well for some departments or management levels in your company and that driving the system by person works well for others. If so, you can use both methods with a setting called *partial position management*.

Note. This decision doesn't affect your PeopleSoft payroll system. No matter which method you choose, using PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Global Payroll is not a problem.

Considerations for Pension, Payroll, and Benefits Applications

If you use PeopleSoft Enterprise Pension Administration, you track your pension payees—retirees, beneficiaries, and QDRO (qualified domestic relations order) alternate payees—using the same tables that you use to track your workers. You want to drive your retiree organization by person (or in this case, by payee), rather than by position, so that you don't have to establish a different position for each payee in the system. To drive your worker organization by position and your payee organization by person, use the partial position management option.

This also applies to organizations that use PeopleSoft Global Payroll and PeopleSoft Payroll for North America. If your organization uses the PeopleSoft Human Resources Manage Base Benefits business process or PeopleSoft Enterprise Benefits Administration, you can set up your position management options using full or partial position management.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce"

Chapter 3

Working with System Data Regulation in HRMS

This chapter provides an overview of PeopleSoft HRMS system data regulation, lists prerequisites, and discusses how to:

- Work with business units.
- Work with tablesets.
- Work with permissions lists and system defaults.

Understanding PeopleSoft HRMS System Data Regulation

As companies grow larger and more complex, they often need to collect the same type of data across many locations. PeopleSoft business units and setIDs enable you to organize businesses into logical units other than companies and departments and to define how organizational data is shared among these units.

PeopleSoft HRMS system data is regulated through the use of business units, tablesets and setIDs, and tableset sharing. Business units are logical devices that enable you to implement PeopleSoft HRMS based on how *your* business is organized. Tablesets, setIDs, and tableset sharing are organizational devices that enable you to share – or restrict – the information stored in your HRMS system across business units:

Business Unit	A logical organizational entity.
SetID	A high-level key on many control tables.
TableSet	Set of rows on a control table, grouped by setID, that is available to specific business units.

Components Used to Set Up Business Units and SetIDs

Once you've developed your business unit map, use the following components to set up business units and setIDs and to define system defaults based on permission lists or business units:

Component	Location
TableSet IDs component (SETID_TABLE)	PeopleTools, Utilities, Administration, TableSetIDs
Business Unit component (HR_BUSINESS_UNIT) See Chapter 11, "Setting Up Organization Foundation Tables," Defining Business Units, page 236.	Set Up HRMS, Foundation Tables, Organization, Business Unit
Record Groups component (REC_GROUP_TABLE)	PeopleTools, Utilities, Administration, Record Group
Org Defaults by Permission Lst component (OPR_DEF_TBL_HR) See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312.	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst
Business Unit Options Defaults component (BUS_UNIT_OPT_HR) See Chapter 11, "Setting Up Organization Foundation Tables," Setting Business Unit Defaults, page 241.	Set Up HRMS, Foundation Tables, Organization, Business Unit Options Defaults
TableSet Control component (SET_CNTRL_TABLE1)	PeopleTools, Utilities, Administration, TableSet Control

Prerequisites

Before you implement PeopleSoft HRMS, take a close look at how your business operates and analyze how you want to map your organization's business structures, practices, and procedures.

You can set up business units and tableset IDs before or after setting up the Installation Table component (INSTALLATION_TBL) and entering companies on the Company component (COMPANY_TABLE). However, you should set up the Installation Table component and Company component before continuing on to the TableSet Control component, Business Unit Options Defaults component, and Org Defaults by Permission Lst component.

Working with Business Units

This section provides an overview of business units and discusses how to determine your business unit structure.

Understanding Business Units

Business units are logical units that you create to track and report specific business information. Business units have no predetermined restrictions or requirements; they are a flexible structuring device that enable you to implement PeopleSoft HRMS based on how your business is organized.

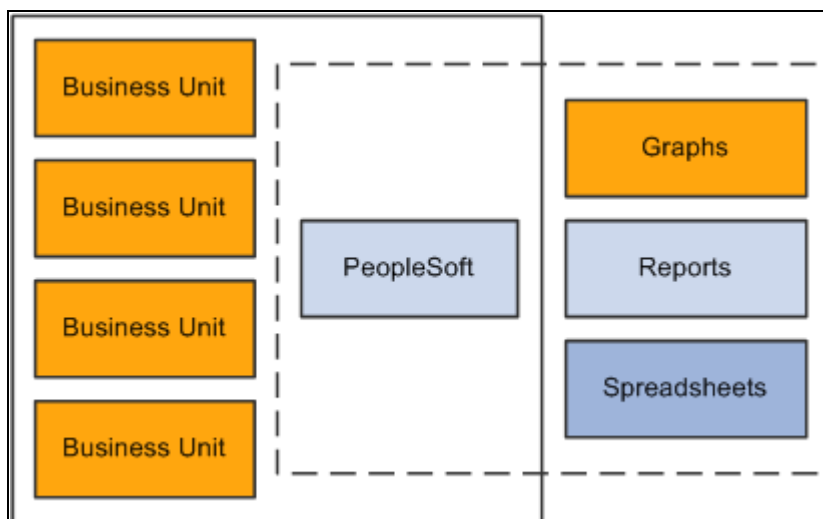
Business units share processing rules and you can create them at any level of the organization that makes sense and that reflect the needs of your internal human resources departments. If you use the same processing rules across the organization, it may make sense to have a single business unit; if you use different rules in different companies, countries, or functional areas, you may choose to create multiple business units.

Because PeopleSoft HRMS doesn't offer any predetermined definition for a business unit (as it does for a department and a company), you can implement this organizational level in your PeopleSoft HRMS applications to reflect your own enterprise's structure. You can share business units across any combination of PeopleSoft Enterprise HRMS, Financials, Manufacturing, and Distribution applications or define them in just one PeopleSoft Enterprise application.

Note. For PeopleSoft HRMS, you *must* establish at least one business unit.

You have complete control over how you define business units in your PeopleSoft HRMS system, as well as how you use them to facilitate the handling of data in your data organization. For example, you could set up a business unit for each legal entity in your organization, all to be processed by a central human resources department that interfaces with and manages each business unit's information, workers, and processes. Alternatively, you could set up one business unit for each company, location, or branch office in your enterprise, enabling each unit to manage its own human resources information independently, while sharing data with a central, parent business unit.

While each business unit maintains its own human resources information, your organization can maintain a single, centralized database, reducing the effort of maintaining redundant information for each business unit. More importantly, as this diagram illustrates, you can produce reports across business units, enabling you to see the big picture and to compare the finest details.



A centralized data enables analysis and reporting across business units

See Also

Chapter 2, "Understanding HRMS," Control Tables, Transaction Tables and Prompt Tables, page 3

Determining Your Business Unit Structure

Business units offer a flexible structuring device through which you can implement PeopleSoft HRMS based on the way your business is organized. In some organizations, the correspondence between existing structures and the business model is obvious. In other cases, it may take some careful thought and analysis to determine how to set up the business units to best reflect your organizational structure and to best use the exceptional power and capabilities of PeopleSoft HRMS. When deciding how to establish business units for your PeopleSoft HRMS implementation, keep the following points in mind:

- With business unit functionality, you have another level for associating a person with your company's organizational scheme.
- Business units are always associated with a job, position, and a person's job record.
- Business units have no predetermined definition (unlike department and a company). You can implement this new organizational level as you determine its usefulness to your enterprise.
- Business units are not legal entities, but a way of tracking specific business information for reporting and other rollup data collection.

Work closely with your PeopleSoft implementation partner early in your design to determine how best to define the business units for your PeopleSoft HRMS system. Every organization has different requirements, and it's not possible to cover all the variables that you might encounter. However, once you've identified your business unit structures and made a tentative decision about how many business units you'll need, take a step back and ask the following questions:

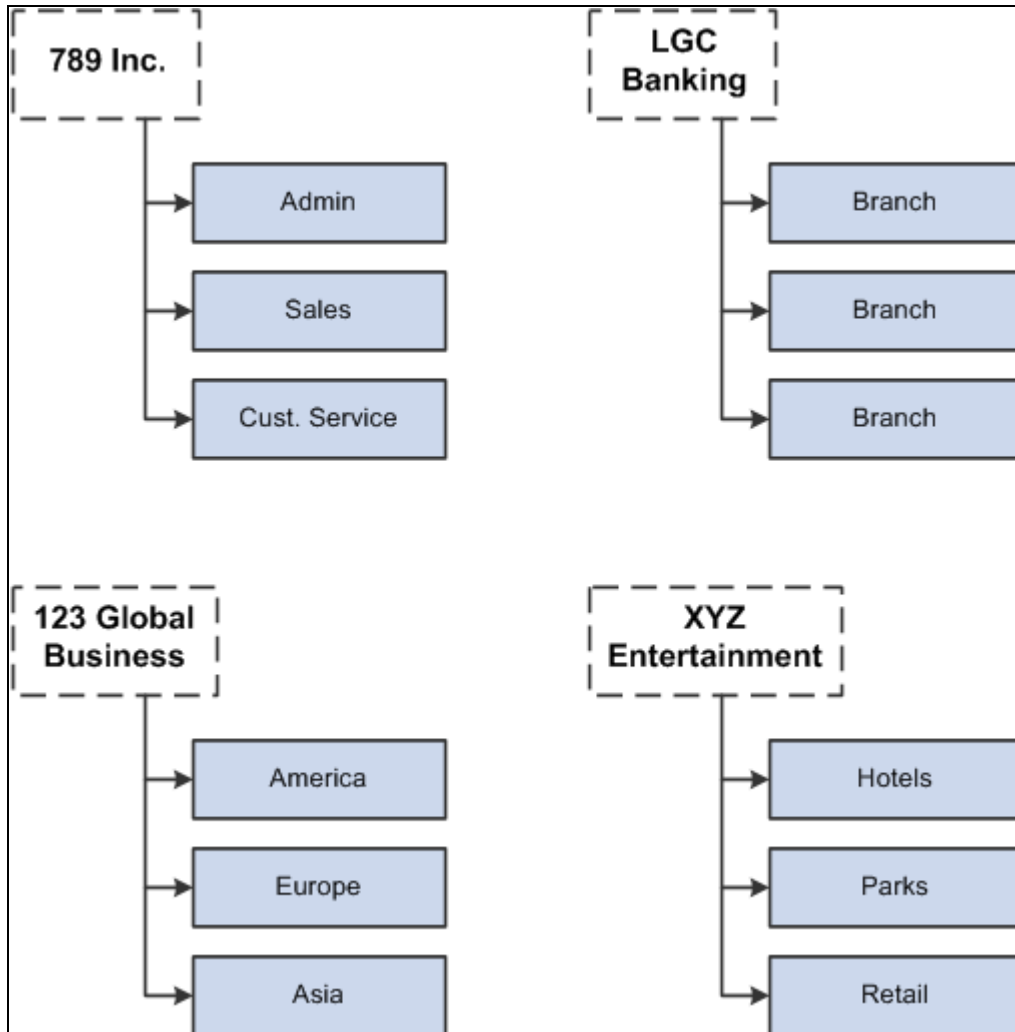
- Are the business unit structures and number of business units correct?
- Is there any reason why these structures would not work?
- Will these structures preclude me from taking advantage of some functionality that I might want to use?
- Will these structures restrict my reporting options?
- Will these structures cause me to process more than I want to process on any particular night?

Possible Business Unit Structures

How you define a business unit depends on your industry, statutory requirements, regulatory reporting demands, or how you've organized operating responsibilities. Consider the following scenarios and the supporting diagram below:

- *789 Inc.* chooses to organize information by functionality or purpose, such as what is going on in Sales versus Customer Service. It has created business units that reflect the administrative needs of their human resources, benefits, and payroll departments.
- *LGC Banking* treats each branch as a business unit, which means that the bank could do reporting for its people within each branch.

- *123 Global Business* is a multinational company that separates its operations geographically because of the necessities of conducting business abroad. What is more important to this organization may not be each office, but each location. What's happening in their American facility versus their European or Asian market? Then they can track their business requirements and business needs accordingly.
- *XYZ Entertainment* has subsidiary companies. A highly diversified organization like this one might choose to define each subsidiary company or cost center as a business unit. They might have a hotel business as well as a retail business and they might want to keep this information separate, yet still be able to roll everything up into one database and maintain it in a single location.



Business units can be set up to represent functional areas, branches, regions, subsidiaries, or what best fits your organization's needs

You can also use a combination of all of these methods, or any other entity or entities that makes sense for your organization. You can have as many business units as you need, although the more business units you establish, the more information you need to maintain. You do, however, need to have at least one business unit in the system.

Implementing Business Units

While you can implement one business unit for your entire organization, establishing multiple business units can offer important reporting and data control options. Multiple businesses units enable you to:

- Maintain a tree structure to facilitate organization-specific, rollup reporting.
- Distribute administration of certain control tables, such as the Department component (DEPARTMENT_TBL) or the Location component (LOCATION_TABLE) to different business units.

For large or multinational companies, this feature of business unit functionality in PeopleSoft HRMS is useful for controlling data flow across different parts of the enterprise.

Note. If you implement PeopleSoft Enterprise Benefits Administration, you can define eligibility rules that determine workers' benefits eligibility based on their business unit affiliation.

Working with TableSets

This section provides overviews of tablesets and discusses how to:

- Set up tableset sharing.
- Control data sets.
- Reference multiple setIDs.

Understanding Tablesets

To work with tablesets, you need to be able to distinguish between tablesets, setIDs, and tableset sharing:

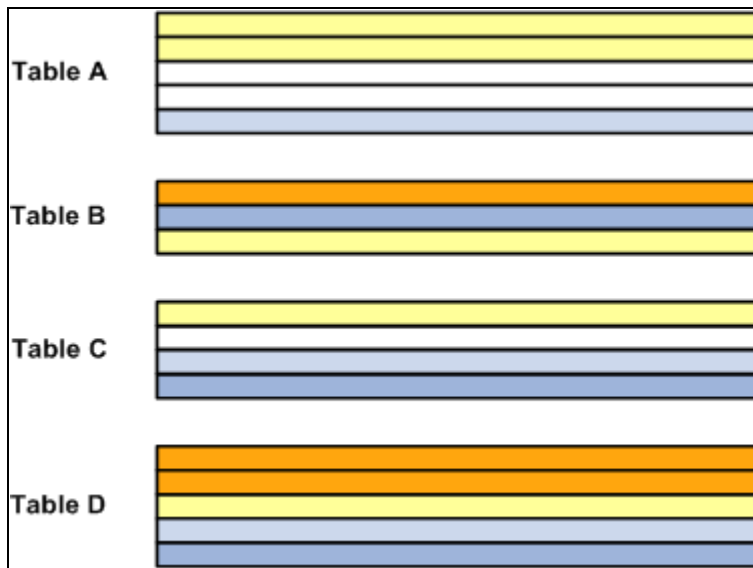
tableset	A set of data rows in a control table that is identified by the same highlevel key.
setID	The highlevel key that identifies a set of data rows. There are two types of setIDs: • Physical SetIDs The setID of a business unit (BUSINESS_UNIT = SETID). The rows of data in a physical setID have a one to one relationship with the business unit. • Logical SetID A logical setID that is generic and determined by business rules other than business unit. Logical setIDs enable you to share rows of data across multiple business units.
tableset sharing	Sharing rows of data in a tableset across business units or limiting rows to a single business unit.

Note. The terms tableset and setID are sometimes used interchangeably. In many cases, this is correct, but it can cause some confusion.

You can define as many tablesets as you like, but the more you create, the more complex tableset sharing becomes. Some organizations need only one tableset.

Note. For PeopleSoft HRMS, you must create at least one tableset and setID.

Since you use setIDs to distinguish sets of rows in a table, you will always have the same number of setIDs as you have tablesets. For example, the following diagram shows four control tables. Each color within the table represents a setID, and all rows with the same color represent a tableset. Tables A and B are made up of three tablesets each, and tables C and D consist of four different tablesets, but there is a total of five setIDs, or tablesets, between the four tables:



SetIDs differentiate rows of data in a table and identical setIDs make up tablesets

PeopleSoft Enterprise Human Resources control tables that are keyed according to setID include the:

- Location component.
- Department component.
- Salary Plan component.
- Job Code component.

Tableset Sharing

Tableset sharing enables you to share some or all of your control table data from business unit to business unit, instead of having to enter the same data multiple times. The key to sharing that information is determining which rows of data can be shared across business units, which should be shared across some business units but not others, and which should be restricted.

For example, you can centralize redundant information such as country codes in a setID that is shared while keeping information such as departments and job codes decentralized amongst different setIDs. The goal of tableset sharing is to minimize data redundancy, maintain data consistency, and reduce system maintenance tasks.

Tablesets form the building blocks of your HRMS system. You populate the individual tables in the tableset according to your particular business rules or processing options. You can also mix and match tablesets by updating tableset assignments for a business unit using the TableSet Control component (SETID_TABLE).

You aren't required to share all tables in a tableset. With PeopleSoft HRMS, you can share any combination of tables with any number of business units, according to your needs. Use the TableSet Control page to identify which data should be shared and how it should be shared for each business unit.

This diagram shows how one tableset is shared across all three business units in an organization for one group of records, the job code records, and for another group of records, the location records, each business unit uses it's own setID. For the third group of records, salary plans, one table set is shared between two business units, ABC and QRS, but the third business unit, XYZ, uses the values created under another setID:

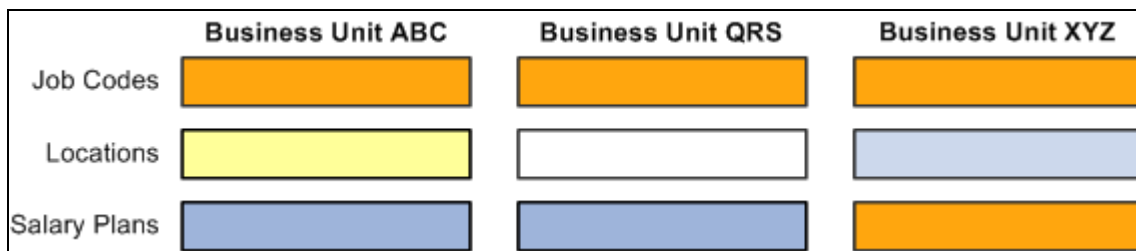


Table sets can be shared across business units or be unique to a business unit

Record Groups and Tableset Sharing

For the purpose of tableset sharing, control tables are divided into record groups. A record group is a set of control tables and views that use the same group of setIDs in the same manner.

Record groups serve two purposes:

- They save time by enabling you to set up tableset sharing without an enormous amount of redundant data entry.
- They act as a safety net by ensuring that tableset sharing is applied consistently across all related tables and views in your system.

A record group can contain a single table or many tables and views. You can update or modify which tables and views are included in each record group by using the Record Group component.

Business Units and SetIDs

When you create a business unit, you must assign to it a default setID. You have two options:

- If you want to create rows of data in the control tables that should be used only by this new business unit, create a setID for the business unit when you create the business unit.

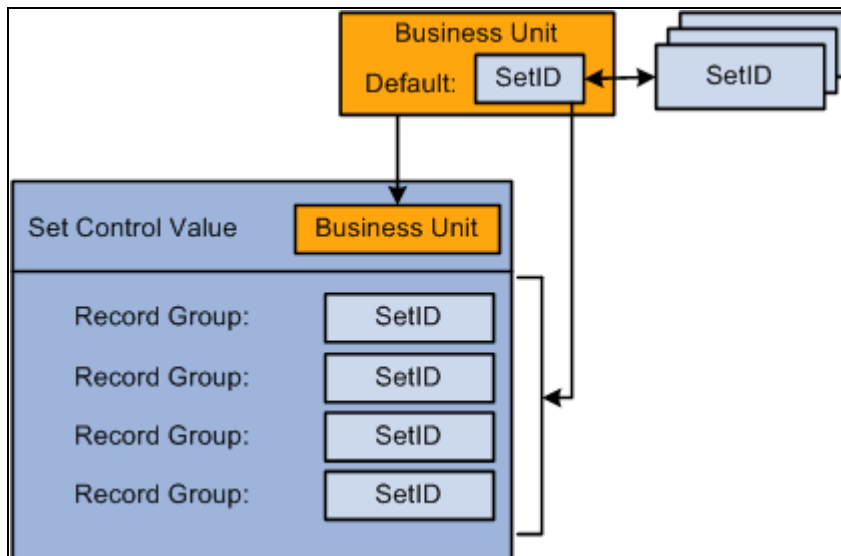
You can create a setID at the time you create a business unit by accepting the business unit code in the SetID field. When you do this, the system creates a record setID on the TableSet IDs component when you save the business unit.

Note. This is the best option if you are only using one business unit.

- If you want the business unit to share rows of table data (tableset sharing) with other business units, select the existing setID that is or will be associated with the data rows you want to make available to this business unit.

Regardless of which option you choose, when you save the business unit the system creates an entry in the Tableset Control component for that business unit and associates with each record group the default setID you selected for the business unit. You can change the setID assignment in the TableSet Control component.

This diagram shows the relationship between setIDs and business units and illustrates the information the system creates for the business unit in the TableSet Control component where you can change some or all of the setID assignments:



Tableset controls determine which tableset a business unit uses for which record group

Setting Up TableSet Sharing

Setting up tableset sharing is easy. Use tableset controls to make data available across business units or restrict to certain business units. Before you set up tableset controls, create:

- Record groups
- Business units
- SetIDs

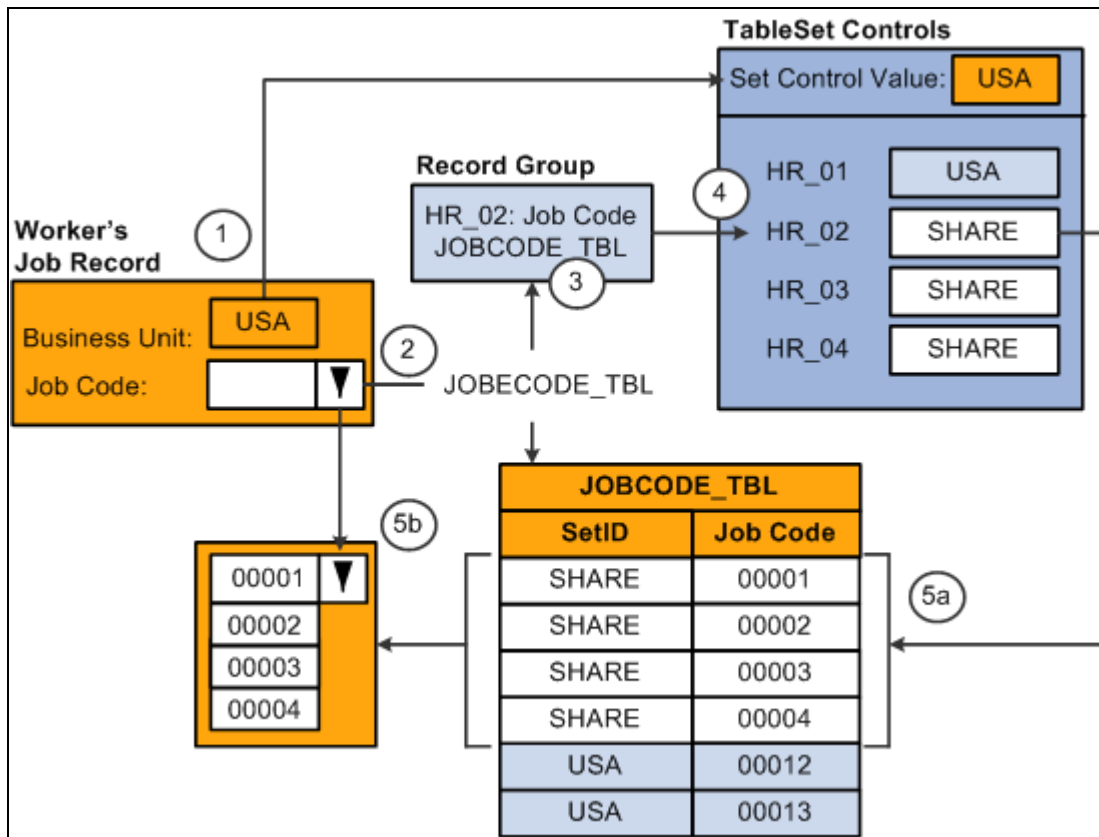
When you create and save a business unit, the system creates a record in the TableSet Control component for the business unit (the Set Control Value) and populates the setID for each record group with the setID you selected for the business unit. If you want the business unit to have access to the rows in other setIDs for certain record groups, change the default setID to the appropriate setID. This means that a lot of tableset sharing setup is done for you behind the scenes.

Controlling Data Sets

The system filters the field options available to the user in the transaction components based on the tableset controls you set up. For example, when a user is creating a job data record for a new worker and selects the drop down list for the Job Code field, the system filters the available options by determining the following:

1. What business unit is this person's job data record in?
USA
2. What table controls data for this field (Job Code)?
JOBCODE_TBL
3. What record group is that table in?
HR_02
4. What setID is assigned to that record group for this business unit?
SHARE
5. What rows in the control table (Job Code Table) are keyed by that setID?
 - a. The system looks only for the job code with the SHARE setID values.
 - b. The system makes available to the user only the rows keyed by the SHARE setID.

This diagram shows the tableset controls for the USA business unit and illustrates how the system determines which job code values to display for that business unit, as described above:



Retrieving valid control table values for a field based on business unit tableset control setIDs

If the user were accessing a field whose control table was in record group HR_01, the system would display the values keyed by the setID USA from the corresponding control table. The data the system makes available to the user depends on the setID specified in the TableSet Control component for the record group that contains the control table the user is accessing.

Referencing Multiple SetIDs

Occasionally, some pages have references to more than one setID. It's important to understand how the Page Processor works through such a situation when you're working with setID functionality. This will help you to understand how the system is making decisions about default values in the data record.

Two scenarios exist in PeopleSoft HRMS where a table that is keyed by one setID also has fields that prompt onto another setID table:

Scenario 1: A Control Table with Multiple SetIDs, but No Defaults Based on Those SetIDs

An example of a control table that is associated with multiple setIDs is the Departments component (DEPARTMENT_TBL). The record for the component, DEPT_TBL, has two setIDs: the setID for the department and the setID for the department's location. The setID for the location prompt comes from the LOCATION_TBL record.

Department Profile **Comm. Acctg. and EG**

Set ID: SHARE Department: 13000 [Business Units that use this Set ID](#)

Department Profile Find | View All First 1 of 1 Last

*Effective Date: 10/14/2008 *Status: Active

*Description: Finance and Administration Short Description: Finance

Location Set ID: SHARE Table Set shared across Corp

Location: KUDE00 Delaware Operations

Company: GBI Global Business Institute 9999

Manager Type

☐ None

☒ EmplID Manager ID: KU0003 Jean Parsons

☐ Position Manager Position: Empl ID:

Department Profile page

In this situation where this is a department setID and a location setID, you can set up the component so that the system makes available in the Location field:

- All locations from all setIDs.
- Locations that share the same setID and the department's setID.

Making all locations available may cause problems if a user creates a department with a location in a setID that is not used by any business unit with access to the department's setID. Making only one location setID available could cause problems if business units with access to the department's setID use different location setIDs.

For example, an organization has the following tableset controls set up for its four business units for the DEPT and LOCATION record groups:

Business Units:		PDEV	EURO	ASIA	RUSS
Record Groups:	DEPT	USA	EURO	USA	EURO
	LOCATION	USA	EURO	ASIA	RUSS

Note. Set up tableset controls on the Tableset Controls component.

If you limited the location setID to the setID of the department, you would not be able to set up departments with a valid location for the *ASIA* and *RUSS* business units. If you made all locations in all setIDs available, you run the risk of users creating a department in setID *USA* with a location in setID *EURO*.

To limit the locations available to a department, while still accommodating the different tablesharing arrangements, you could limit the location setIDs to *USA* and *ASIA* when the department setID is *USA* and to *RUSS* and *EURO* when the department setID is *EURO*.

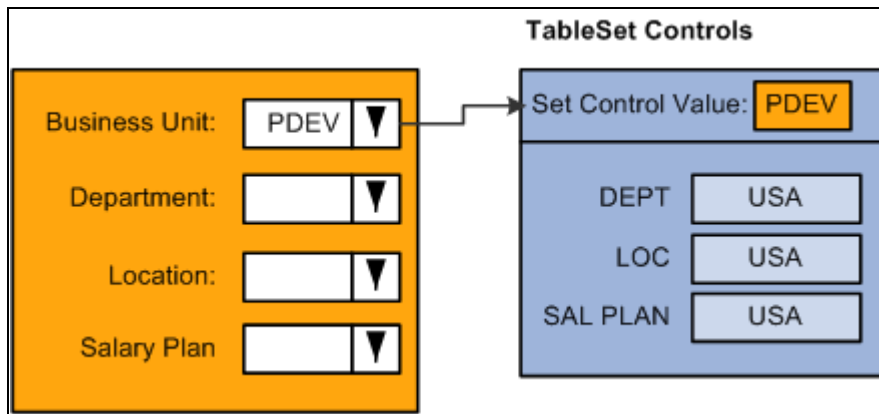
Scenario 2: A Transaction Table with Multiple SetIDs Controlling Defaults Across the Transaction Record

An example of a transaction table that has multiple setIDs controlling defaults across the record is the Job Data component (JOB_DATA).

When you create a job data record for someone, you select a business unit on the Work Location page (JOB_DATA1). The system uses the business unit's tableset controls to determine which values to make available in other fields on the component and when to use established defaults.

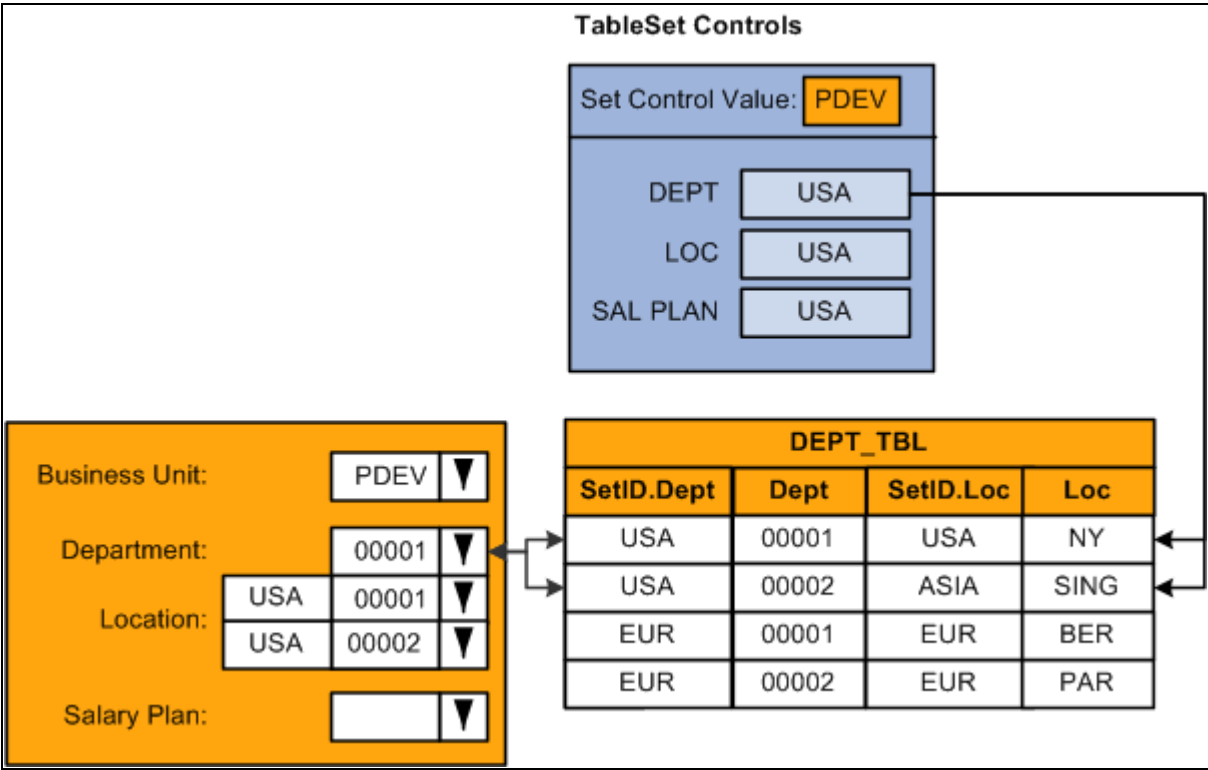
The system only displays departments that are in the setID selected for the business unit and defaults in the department's location only if the location is in a valid setID for the business unit. Locations have associated salary plans, and the system defaults in the location's salary plan only if the salary plan is in a valid setID for the business unit. If a default value is not in a valid setID for the selected business unit, the system leaves the field blank and the user selects a value from the options in the valid setID.

For example, in the Job Data component, select the business unit, such as PDEV as shown in this diagram. The system references the tableset controls for that business unit to determine the valid setIDs for many of the other fields on the component, such as Department, Location, and Salary Plan:



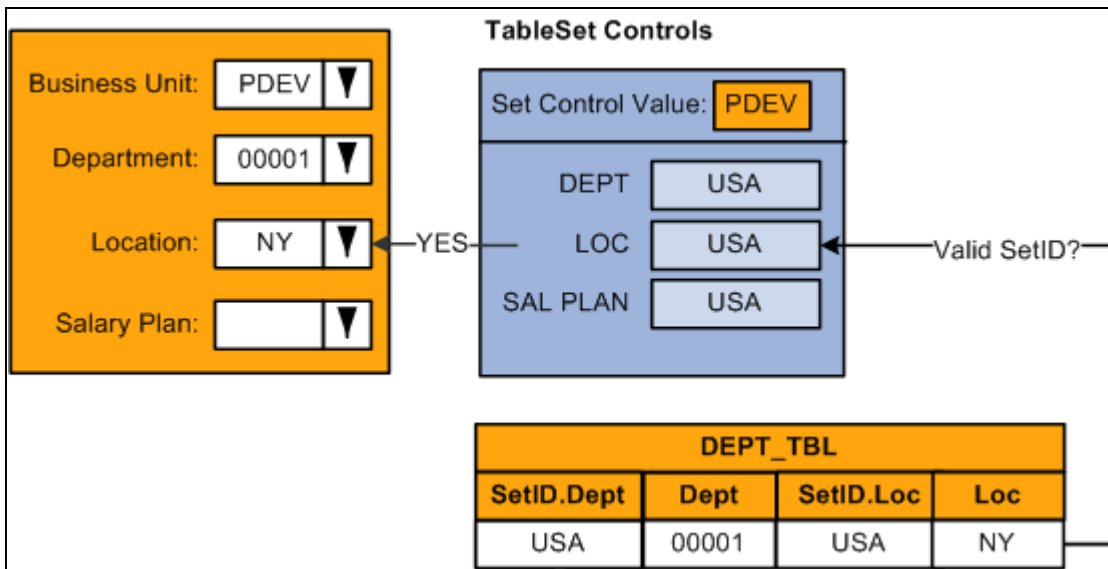
Select the business unit, which determines the valid setIDs for many fields in the component

When you select the Department lookup button in the Job Data component, the system references the TableSet Control table for the record group row that determines which department setID is available for this business unit. Since USA is the designated setID for the department record, the system only displays in the search list those departments with the USA setID. In the diagram below this would be departments USA-00001 and USA-00002:



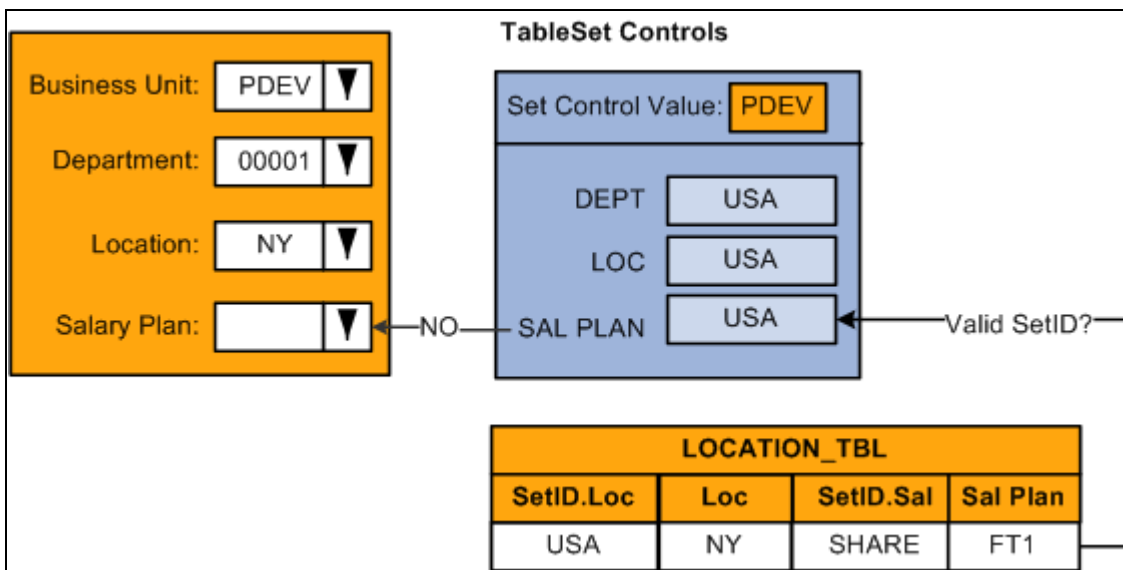
The system only displays values keyed by the designated setID identified for this field's prompt table for this business unit

The system also checks to see if the setID of the location associated with the department is valid for this business unit. In this example, only locations with the setID USA should be valid for the PDEV business unit. When the location associated with the department uses the setID USA, such as department USA-00001, which is associated with location USA-NY, the system enters the default location in the Location field. If you were to select department USA-00002, the location associated with this department, with the setID ASIA, will not default into the Location field. The system leaves the Location field blank:



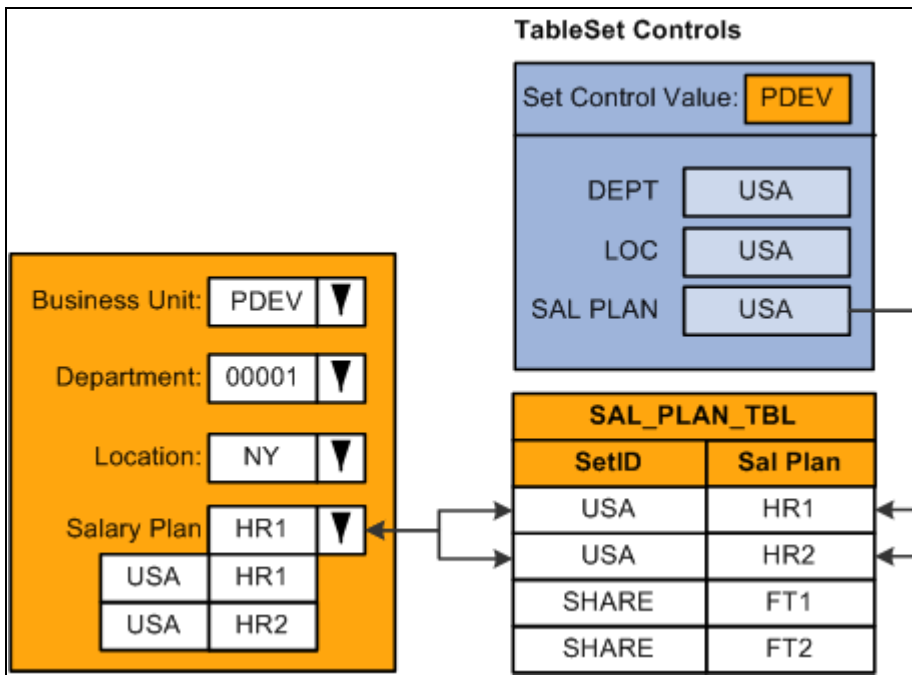
The system only enters the default location value from the Department table if it is in a valid setID for the person's business unit

If the salary plan is associated with the location, the system checks the TableSet Control record for the business unit, in this example PDEV, to see if the setID of the salary plan associated with this location is valid for this business unit. Since valid values for this business unit should be associated with the USA setID, and the salary plan associated with the USA-NY location uses a salary plan setID of SHARE, the salary plan will not be provided by default into the worker's record:



The system does not enter the default value if the value's setID is not valid for the business unit

When you select a salary plan, the system will only retrieve those rows from the Salary Plan table that begin with setID USA, as defined on the tableset controls for business unit PDEV:



You can only view and select from values with the valid setID as defined for the field

Note. Many of the setID driven control tables enable you to review which business units have access to the selected setID so that, as you set up your control values, you can confirm that they will be available to the appropriate business units.

Working with Permissions Lists and System Defaults

This section discusses how to:

- Link to permissions lists.
- Define business unit HR defaults.
- Determine system default values.

Linking to Permission Lists

PeopleSoft security is based on building blocks called permission lists. Permission lists grant users access to applications, functionality, menus, data, and so on. Most permission lists are grouped into roles and the roles are granted to users. However, there are four permission lists that control specific aspects of the application that are assigned directly to the user profiles.

One of these permission lists, the primary permission list, determines which default values the system enters for the user (among other things). On the Org Defaults by Permission List component (OPR_DEF_TBL_HR) set up primary permission lists with:

- Default values for the following fields:
 - Business Unit
 - SetID
 - Company
 - Country
 - Regulatory Region
 - To Currency
 - Currency Rate Type
- Application settings, such as the payroll system and industry.

When a user logs onto the system, the system references the user's primary permission list to determine which settings to apply and which values to enter as defaults on components that support primary permission list defaulting. This helps to ensure that users are entering the right information for the kind of work that they do.

Note. Not all components use the defaults from the primary permission list.

Warning! Not associating system users with permission lists can result in serious data errors in PeopleSoft Human Resources.

See Also

Chapter 5, "Setting Up and Administering HRMS Security," page 39

Enterprise PeopleTools PeopleBook: Security Administration

Defining Business Unit HR Defaults

When users access an HCM component, the system populates some of the fields, such as business unit, company, and country using the values you associated with the user's primary permission list. You can also associate default values with setIDs on the Business Unit Options Defaults page (BUS_UNIT_OPT_HR).

Using the tableset controls and business unit default options you set up, the system determines the default values to enter in select fields on the transaction component. The system uses these defaults only on components where the system identifies the business unit field as a source for default values.

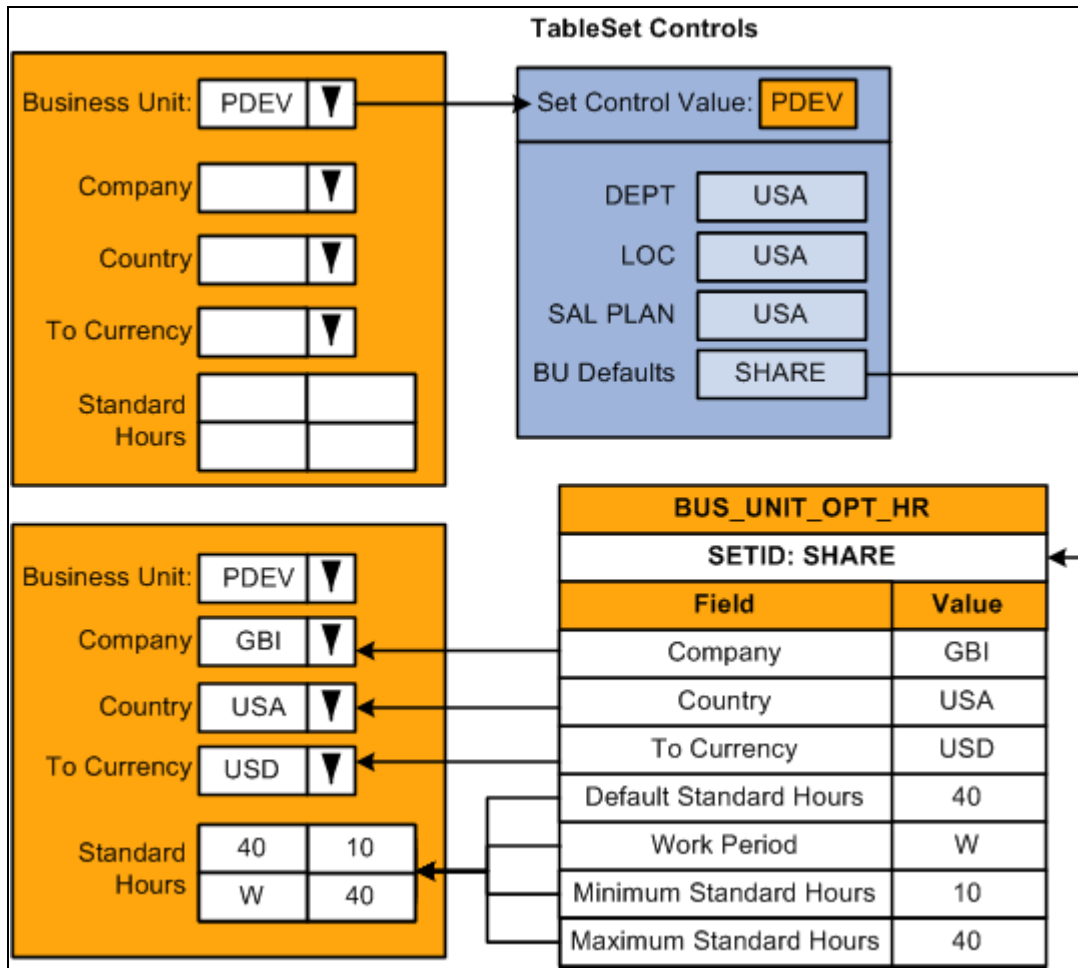
To set up business unit defaulting:

1. On the Tableset Control – Record Group page (SET_CNTRL_TABLE1), select the setID that controls business unit defaulting for this business unit.

This enables you to share defaulting rules across business units.

2. Enter the setID's default values on the Business Unit Options Defaults component.

When a user accesses a component, which is driven by business unit defaulting, and selects a business unit, the system determines which setID drives defaulting for that business unit by referencing the record group BU Defaults on Tableset Control table. For example, for business unit PDEV, the setID for the record group BU Defaults row is SHARE. The system references the Business Unit Options Defaults component for setID SHARE to retrieve the default values and then enters those values in the transaction component, as this diagram illustrates:



The system determines the defaults for a selected business unit by referencing the tableset controls and the business unit default options

Note. The record group containing the Business Units Options Default record (BUS_UNIT_OPT_HR) is HR_06.

Setting up business unit defaults on the Business Unit Options Defaults page makes sense when you have multiple business units that share the same kind of defaults; but shared defaults are not readily organized by permission list but rather setID.

Determining System Default Values

Most of the page-level defaults in the PeopleSoft HRMS system are based on the primary permission list as opposed to business unit. Business unit defaulting generally only occurs on components that are driven by the business unit or that use EmplID as a high-level key.

This table lists the four most common scenarios in which the system must determine which default values to use, either the defaults that you defined on the Business Unit Options Defaults component or on the Org Defaults by Permission List component:

<i>On the Component</i>	<i>How the System Determines Defaults</i>
Select a business unit.	The system enters the default values from the Business Unit Default Options component.
Select an EmplID value, but no business unit value.	The system determines the person's business unit by checking the person's JOB record for that EmplID/ERN combination and then enters the default values from the Business Unit Default Options component.
The component does not have either the Business Unit or EmplID fields.	The system enters the default values from the Org Defaults by Permission List component.
The component uses a setID without an associated business unit or EmplID value. (This is the situation on most setup and control components, such as the Location and Department components.)	The system enters the default values from the Org Defaults by Permission List component.

Warning! The paradigm above isn't strictly followed in the system and should be used as a guideline *only*. Actual defaulting at the page level is governed primarily by page functionality.

Note. Some degree of flexibility has been incorporated for exceptions to those pages that don't fall into either of these categories.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Enterprise PeopleTools PeopleBook: Data Administration Tools

Chapter 4

Working with Regulatory Regions

This chapter provides overviews of regulatory regions and regulatory region table relationships and discusses how to:

- Establish regulatory regions.
- Associate a regulatory region with a transaction.

Understanding Regulatory Regions

The Regulatory Region functionality in PeopleSoft Enterprise Human Resources is for use in performing regulatory and regional edits. You use Regulatory Region to drive PeopleCode edits, perform set processing, and control what codes and values the user sees.

A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing. These requirements include areas such as ethnicity, disability, and health and safety. When driven by Regulatory Region, the regulatory codes, PeopleCode edits, and set processing in the system can vary by country and for each transaction .

When your system users enter data into PeopleSoft Human Resources, you want them to use the codes and data that are applicable to the regulatory region that they are working with. Using the Regulatory Region feature helps ensure that your users focus on the correct data sets, making their data entry faster and more accurate.

This functionality is especially helpful for organizations that have a multinational workforce. Consider the following examples where the Regulatory Region concept would be useful for organizing your business data:

- An employee officially works in the U.S., but has a health and safety-related incident occur during a business trip in Canada. Using Regulatory Region in the Incident Details component, your users work with incident data and codes (body parts, dangerous occurrences, diagnosis codes, and so forth), that are applicable to the country in which the incident occurred.
- Your organization has implemented PeopleSoft Enterprise Benefits Administration and would like to use its automatic eligibility processing capabilities to determine the benefits enrollment options for your U.S. and Canadian employees. Because benefits rules in Canada and the United States vary, you can use the Regulatory Region on the Eligibility Rules table to set up two sets of benefits eligibility rules: one set for your Canadian workers and another for your U.S. workers.

Understanding Regulatory Region Table Relationships

Use the following pages to review and set up Regulatory Region controls for your system:

- Regulatory Region (REG_REGION)
- Transaction (REG_TRX)
- Regions in Transaction (REG_TRX_REGION)

Use the Regulatory Region page to view or modify existing regulatory regions and to establish additional regulatory regions. The regulatory regions you create can be based on countries or regions within countries, such as states or provinces.

Use the Transaction page to view and modify existing transaction types or to establish and describe new regulatory transaction types.

Use the Regions In Transaction page to view and modify the regulatory regions that define existing regulatory transaction types and to establish the regions that define the new transaction types that you create.

The following table shows the relationships between the regulatory region pages that you use to define and administer regulatory regions in PeopleSoft Human Resources:

<i>REG_REGION_TBL</i>	>	<i>REG_TRX_REGION</i>	<	<i>REG_TRX</i>
REG_REGION DESCR50 COUNTRY REG_AVAIL		REG_TRX REG_REGION		REG_TRX DESCRLONG

These pages do not have an Effective Date or an Effective Status. Both REG_REGION_TBL and REG_TRX have Related Language tables. You can hide data that you don't want by either making the REG_AVAIL = NOT or removing it from the transaction's region list.

Note. During configuration, you must create regulatory regions before you can create transactions and establish the relationship between them. A regulatory region can be used by many transactions.

Establishing Regulatory Regions

While the system is delivered with defined regulatory regions, you might want to add new regulatory regions if you have operations in additional countries. Or you might want to create additional regulatory regions that correspond to regions within countries, such as states or provinces, that impact the way your company does business. For example, you might want to set up regulatory regions for each state in the United States, if you thought that significant regulatory codes or data definitions would vary from state to state. Use the Regulatory Region page to establish these additional regulatory regions.

Note. You don't have to create new regulatory regions. You create new regulatory regions only if there is a special need, perhaps to accommodate specific local regulations. You do have to use the existing regulatory regions that are already in the system. If you have operations in only one country, and you want to limit the impact of Regulatory Region on your data entry users, then you can assign your one region as the default region in the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR).

Note. Although the scope of a regulatory region can be smaller than a country, PeopleSoft recommends that the standard Regulatory Region be at the country level.

To simplify matters and provide consistency, we recommend that you use the following naming standard when creating new regulatory regions:

- For new country-level regulatory regions, use the 3-character, ISO-certified country code found in the Country Table component (COUNTRY_TABLE).
- For regions that are smaller than a country, use the 3-character country code and concatenate a 2-character unique regional identifier. For example, use CCCSS for state-level or province-level regions, where CCC is the country code and SS is the state or province code. Using this system, the regulatory region code for Canada - British Columbia is CANBC.

See Also

Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Establishing Regulatory Transaction Types, page 160

Associating a Regulatory Region with a Transaction

This section provides an overview of regulatory regions and transactions and discusses how to:

- Maintain regulatory regions.
- Use regulatory regions for transaction processing.
- Establish default regulatory regions.
- Assess the impact on PeopleCode transaction processing.
- Create prompt edit transaction views for REG_REGION.
- Add REG_REGION to human resources transactions.

Understanding Regulatory Regions and Transactions

Regulatory Region is used as a control field on pages throughout your PeopleSoft Human Resources system. It is almost always a required field.

PeopleCode is used to associate the desired Regulatory Transaction type or view with the specific transactions that are processed on a page. Regulatory Region fields have an edit prompt off the transaction specific view. The view displays to a user only those countries that are available for that Regulatory Transaction type and for which the user has security access.

A system of standard defaults assists the user in selecting the appropriate regulatory region and transaction.

Note. Usually you can override the defaults to ensure that the proper regulatory region is assigned to a transaction.

Maintaining Regulatory Regions

The size and definition of a regulatory region can be smaller or larger than a country, varying by the transaction or application. However, the standard region is a Country Code.

You can create additional transaction or application views that display only the applicable regions for that transaction. Place the Regulatory Region field on that transaction record and define an edit prompt in the transaction-specific view. The view should display only those countries that are available to the user (either *Available to All* or *With Global Security Only*, joined with user Global Security). For example, the following table shows some regulatory regions that are already in the system:

<i>Transaction Type</i>	<i>Reg Region (Char 10)</i>	<i>Description (Descr)</i>	<i>Country Code (Alt-Search)</i>	<i>Security Availability Status</i>
Standard	BEL	Belgium	BEL	With Global Security Only
Health and Safety	BEL	Belgium	BEL	
Standard	CAN	Canada	CAN	Available to All
Health and Safety	CANBC	Canada - British Columbia	CAN	
Standard	DEU	Germany	DEU	Available to All
Standard	FRA	France	FRA	Not Available to Anyone
Standard	GBR	UK	GBR	With Global Security Only
Standard	JPN	Japan	JPN	Not Available to Anyone

<i>Transaction Type</i>	<i>Reg Region (Char 10)</i>	<i>Description (Descr)</i>	<i>Country Code (Alt-Search)</i>	<i>Security Availability Status</i>
Standard	NLD	Netherlands	NLD	Not Available to Anyone
Health and Safety	QC	Canada - Quebec	CAN	
Standard	USA	United States	USA	Available to All

You can add regulatory regions for your own configuration. For example, you can add the 50 U.S. states and differentiate at that level for most transactions.

Using Regulatory Regions for Transaction Processing

The system identifies the general regulatory region for a person by looking at the current effective Job Data record for each EmplID and employee record number combination.

For PeopleSoft Human Resources business process functions that need a different regulatory region for a transaction than is generally associated with a person, add Regulatory Region to that transaction. Use a Transaction view (normally STANDARD) from the Regulatory Region table to provide the appropriate prompt of Regulatory Regions for that transaction.

Once REG_REGION is in a page buffer, you can perform regional edits and set processing.

Note. Be sure to use the Country field (related display) of the region for all country specific edits to ensure that the user can go to a finer level of detail for other edits.

Establishing Default Regulatory Regions

Regulatory Region is almost always a required field. The system establishes the default Regulatory Region in different ways, depending on the PeopleSoft Human Resources business process. You can always override these defaults. The following table lists the components that default a Regulatory Region value and the pages the value defaults from.

<i>Component</i>	<i>Default regulatory region value from:</i>
Position Data (POSITION_DATA)	Org Defaults by Permission Lst
Job Data (JOB_DATA)	Position Data (if the worker is assigned to a position) or Org Defaults by Permission Lst (if the worker is not assigned to a position)

Component	Default regulatory region value from:
Incident Details (HS_INCIDENT)	Org Defaults by Permission Lst
Disability (DISABILITY)	Job Data
Establishment (ESTABLISHMENT_DATA)	Org Defaults by Permission Lst
Job Openings (HRS_JOB_OPENING)	Position Data (if the job opening is assigned to a position) or Org Defaults by Permission Lst (if the job opening is not assigned to a position)

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Tracking Disabilities

Chapter 11, "Setting Up Organization Foundation Tables," Defining Establishments, page 273

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

Assessing the Impact on PeopleCode Transaction Processing

Most transactions involve the Regulatory Transaction type STANDARD. The system performs PeopleCode edits against the person's Regulatory Region in the Job Data component and establishes the appropriate transaction PeopleCode that the system should apply to page processes, based on the regulatory region that you enter.

Note. The Regulatory Region field is required on the Job Data pages. On the Job Data pages, you see only the STANDARD list of regulatory regions to which you have security access.

For Health and Safety transactions or incidents, the Regulatory Transaction type HANDS is used because it includes the Canadian provinces as regulatory regions. The Regulatory Region value on the Org Defaults by Permission Lst component appears by default on the Incident Data and Incident Reporting pages.

Creating Prompt Edit Transaction Views for REG_REGION

Because there are two types of transactions in PeopleSoft Human Resources (STANDARD for employee transactions and HANDS for Health and Safety transactions), there are two different prompt views for those transactions. When you add a transaction to your system, you include a new prompt view that can be built from the views that are included in the system.

REG_STANDARD_VW

SELECT

S.OPRID,

R.REG_REGION,

R.DESCR50,

R.COUNTRY

FROM PS_REG_REGION_TBL R,

PS_REG_TRX_REGION T,

PSOPRDEFN S

WHERE T.REG_TRX = 'STANDARD'

AND T.REG_REGION = R.REG_REGION

AND (R.REG_AVAIL = 'ALL'

OR (R.REG_AVAIL = 'GBL'

AND S.OPRID = (SELECT OPRID FROM PS_SCRTY_TBL_GBL G

WHERE S.OPRID = G.OPRID

AND G.COUNTRY = R.COUNTRY)))

REG_HANDS_VW

SELECT

S.OPRID,

R.REG_REGION,

R.DESCR50,

R.COUNTRY

FROM PS_REG_REGION_TBL R,

PS_REG_TRX_REGION T,

PSOPRDEFN S

WHERE T.REG_TRX = 'HANDS'

AND T.REG_REGION = R.REG_REGION

AND (R.REG_AVAIL = 'ALL'

```

OR (R.REG_AVAIL = 'GBL'
    AND S.OPRID = (SELECT OPRID FROM PS_SCRTY_TBL_GBL G
        WHERE S.OPRID = G.OPRID
        AND G.COUNTRY = R.COUNTRY)))

```

Note. You can create new transaction views by doing a Save As and changing the hard-coded transaction name.

Adding REG_REGION to Human Resources Transactions

The following two examples show how to associate regulatory regions with human resources transactions:

Example - Job Data

To associate REG_REGION to a person on the Job Data pages:

1. Add the REG_REGION field to the record JOB.
2. Make the REG_REGION field a required field.
3. After adding the field to the record, define a prompt edit from the standard view (REG_STANDARD_VW).
4. Add this field to the page JOB_DATA1.

Now, when you prompt on the Regulatory Region, you see only those Regulatory Regions to which you have security access.

Example - Health and Safety

We associated Regulatory Region with incidents in Health and Safety. Regulatory Region is a required field that controls the values that are returned by all the Health and Safety setup pages that have SetID as their primary key. For example, if the Regulatory Region for an incident is specified as GBR (United Kingdom), then only GBR codes for Dangerous Occurrences appear on the Incident Details - Description page (HS_INC_DESCRIPTION). Health and Safety incidents have REG_HANDS_VW as the prompt edit.

Warning! All linked setup values for an incident must belong to the same regulatory region. If the Regulatory Region is altered (such as when you are operating in update/display mode), and the SetID for the new Regulatory Region is different from the original, all linked setup fields and values are deleted to prevent inconsistent data. For example, the SetID for the Regulatory Region USA is *USA*, and for GBR it is *GBR*. If the Regulatory Region for an already established *USA* incident is changed to *GBR*, then all of the linked details on the Incident Details pages are lost. The system prompts you that the Regulatory Region is about to be changed, and you can choose whether to proceed before the values are deleted or not.

In Health and Safety, the following SetIDs are mapped for each regulatory region, as shown:

<i>Regulatory Region</i>	<i>SetID</i>
BEL	STD
CANAB	CAN
CANBC	CANBC
CANMB	CAN
CANNB	CAN
CANNF	CAN
CANNS	CAN
CANON	CAN
CANQC	CAN
CANSK	CAN
DEU	DEU
FRA	FRA
GBR	GBR
JPN	STD
NLD	STD
USA	USA

These regulatory regions were mapped to these SetIDs on the TableSet Control – Record Group page (SET_CNTRL_TABLE1).

All regulatory regions that have region-specific sets of codes or values in the Health and Safety system are mapped to a SetID of the same name. This group includes CANBC, DEU, FRA, GBR, and USA.

The other regulatory regions that aren't mapped to a SetID of the same name fall into two additional categories. Except for British Columbia, the Canadian provinces have no specific provincial codes or values in the system and are mapped to the SetID CAN.

All the other countries that are supported directly in PeopleSoft Human Resources and that don't have any region specific codes or values in the system are mapped to a generic SetID value of *STD*. This group includes JPN, BEL, and NLD.

Additional Transaction Modifications for Regulatory Region

We've added Regulatory Region to the following PeopleSoft Human Resources components:

- Position Data, with REG_STANDARD_VW as the prompt edit.
- Job Openings, with REG_STANDARD_VW as the prompt edit.
- Establishment, with REG_STANDARD_VW as the prompt edit.
- Org Defaults by Permission Lst, with REG_STANDARD_VW as the prompt edit.
- Disability/Accommodation Request, with REG_STANDARD_VW as the prompt edit.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions*, "Setting Up Positions," Creating Positions.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook*, "Creating Job Openings."

See Chapter 11, "Setting Up Organization Foundation Tables," Defining Establishments, page 273.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Disabilities.

Chapter 5

Setting Up and Administering HRMS Security

This chapter provides an overview of PeopleSoft security and HRMS security and discusses how to:

- Implement data permission security.
- Set up and assign tree-based permission.
- Assign role-based data permission security to permission lists.
- Refresh security join tables.
- Query data permission security.
- Create data permission security for managers.
- Create and lock user IDs.
- Set up security for local functionality.
- Modify data permission security.

Note. Self Service transactions use both data permission security (discussed in this chapter) and security features unique to Self Service, depending on the transaction.

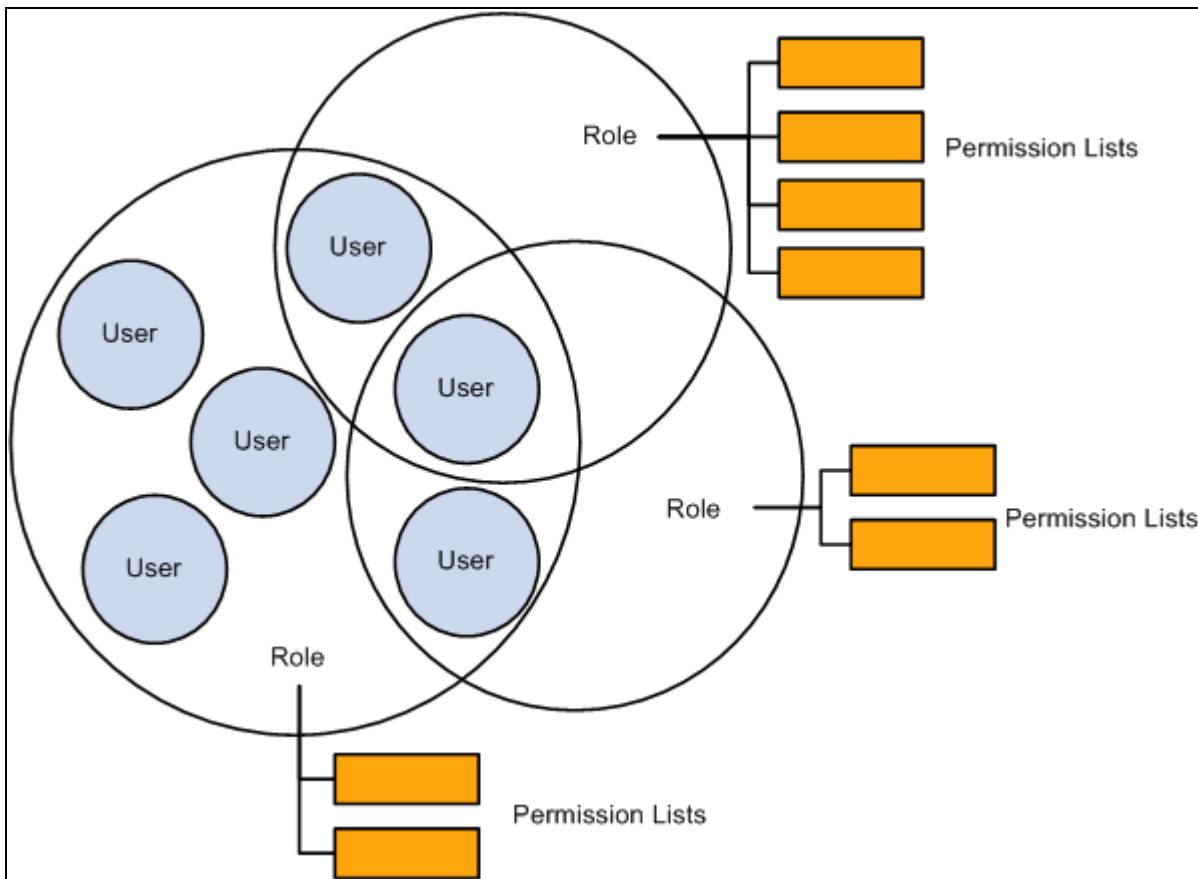
See Also

Chapter 34, "Setting Up and Working with Self-Service Transactions," page 831

PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook, "Defining Installation Options for Recruiting"

Understanding PeopleSoft Security

PeopleSoft security is based on permission lists and roles. This diagram illustrates how permission lists are assigned to roles and then roles assigned to user IDs to create user security profiles:



A user's security profile is made up of permission lists and roles

To administer security:

1. Create permission lists.
2. Create roles and attach permission lists to roles.
3. Create user IDs and attach permission lists and roles to user IDs.

Create Permission Lists

Create permission lists and assign to them access to menus, components, component interfaces, pages, global functionality, along with other information. Permission lists are assigned to roles; however, some permission lists are assigned directly to the user.

Important! Be sure to start with a thorough analysis of your security requirements. For example, if a user has access to a position management page that uses a component interface to update the job data tables, then the user needs permissions for the job data component interface as well as for the position management page.

Create permission lists using the Permission Lists component (ACCESS_CNTRL_LISTX) or Copy Permission Lists component (PERMISSION_SAVEAS) by navigating to PeopleTools, Security, Permissions & Roles and selecting the appropriate component.

The screenshot shows the 'General' tab of a permission list configuration page. At the top, there are navigation tabs: General, Pages, PeopleTools, Process, Sign-on Times, and Component Interfaces. The 'Permission List' is set to 'HCDPALL' and the 'Description' is 'Data Sec by Tree (all trees)'. Below this is a section titled 'Permission List General' containing a 'Navigator Homepage' field with a search icon, two unchecked checkboxes for 'Can Start Application Server?' and 'Allow Password to be Emailed?', and a 'Time-out Minutes' section. In the time-out section, 'Never Time-out' is unselected, and 'Specific Time-out (minutes)' is selected with a value of 180.

Create permission lists in the Permission Lists component or Copy Permission Lists component

Note. Assign data permission to permission lists on the Security by Dept Tree page (SCRTY_TABL_DEPT) and the Security by Permission List page (SCRTY_CLASS) by navigating to Set Up HRMS, Security, Core Row Level Security and selecting the appropriate component.

See *Enterprise PeopleTools PeopleBook: Security Administration*, "Setting Up Permission Lists"

Create Roles

Create roles and assign permission lists to the roles. The access you granted to the permission lists combines under the role. For example, you would assign the permission lists required by your workforce's managers to the role of Manager which, combined, give your managers security access to all elements of the system that managers need. Roles are assigned to the user.

Create roles using the Roles component (ROLEMAINT) or Copy Roles component (ROLE_SAVEAS) by navigating to PeopleTools, Security, Permissions & Roles and selecting the appropriate component.

Permission List	Description	View Definition		
HCSPCMPINT	Standard Comp Intf Permissions	View Definition	+	-
HCSPMSGCHN	Standard Message Channels	View Definition	+	-
HCSPMSSCHG	Standard Mass Change Perm	View Definition	+	-
HCSPPRCS	Standard Process Permissions	View Definition	+	-
HCSPQUERY	Standard Query Permissions	View Definition	+	-
HCSPSERVICE	Standard Service security	View Definition	+	-
HCSPSIGNON	Standard Signon Times	View Definition	+	-
HCSPWEBLIB	Standard WebLib Permissions	View Definition	+	-

Assign permission lists to roles on the Permission Lists page (ROLE_CLASS)

See *Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Roles"*

Create User IDs

Create user IDs and assign to user IDs roles and permission lists to give them access to the system as appropriate.

In addition to the permission lists assigned to roles, the following four specific permission lists are assigned directly to the user on the User Profile - General page (USER_GENERAL) by navigating to PeopleTools, Security, User Profiles, User Profiles, General. Unlike the permission lists assigned to roles, users can have only one each of these four permission lists:

- Navigator Homepage

Navigation homepages are used by PeopleSoft Workflow.

- Process Profile

Process profiles contain PeopleSoft Process Scheduler authorizations.

- Primary

Primary permission lists grant global security.

- Row Security

Row Security permission lists grant data-permission security based on a department security tree. Assign data permission to permission lists on the Security by Dept Tree page.

Note. On the Security by Permission List page you can assign data permission to permission lists that you attach to roles.

General	ID	Roles	Workflow	Audit	Links	User ID Queries
User ID: PS						
Description: [PS] Peoplesoft Superuser						
☐ Account Locked Out?						
Logon Information						
Symbolic ID: SYSADM1						
Password:						
☐ Password Expired?						
Confirm Password:						
User ID Alias:						
Edit Email Addresses Instant Messaging Information						
General Attributes						
Language Code: English						
☐ Enable Expert Entry						
Currency Code:						
Default Mobile Page:						
Permission Lists						
Navigator Homepage: HCSPNAVHP						
Primary: HCPPALL						
Process Profile: HCSPPRFL						
Row Security: HCDPALL						

Create user IDs in the User Profiles component or Copy User Profiles component and assign the Navigator Homepage, Process Profile, Primary, and Row Security permission lists directly to the user profile on the General page

Roles and permission lists combine under the user ID to give users their security access. For example, the HR Training Manager would have the roles of manager, instructor, and employee to meet her access needs as a manager, instructor, and employee. Managers in different departments would have the same manager and employee roles, in addition to other roles that meet their needs.

Assign roles to users using the User Profiles - Roles page (USER_ROLES) by navigating to PeopleTools, Security, User Profiles, User Profiles, Roles:

[General](#)
[ID](#)
[Roles](#)
[Workflow](#)
[Audit](#)
[Links](#)
[User ID Queries](#)

User ID: PS

Description: [PS] Peoplesoft Superuser

Dynamic Role Rule

Execute on Server:

[Test Rule\(s\)](#) [Refresh](#)

[Execute Rule\(s\)](#)

[Process Monitor](#)

[Service Monitor](#)

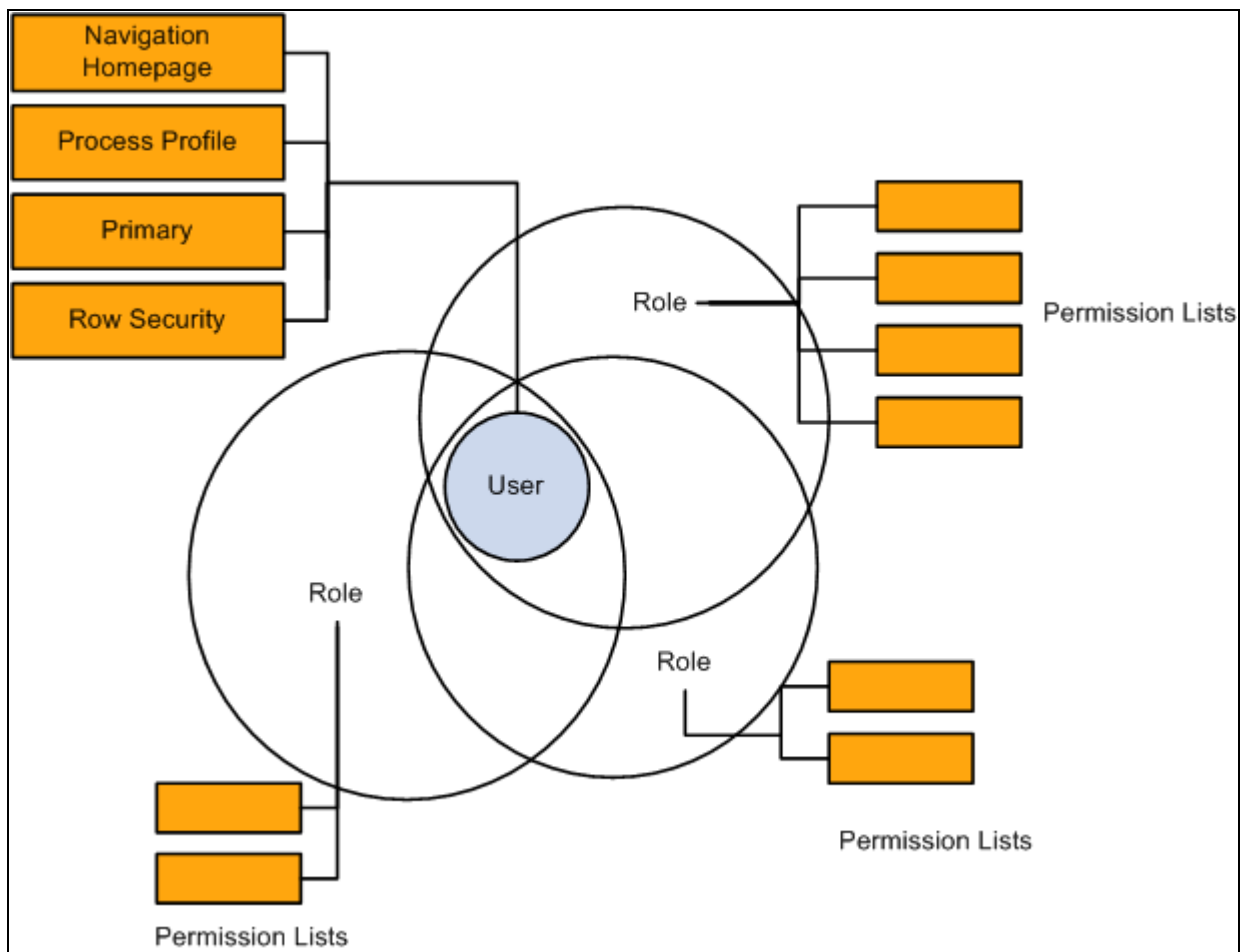
User Roles

Customize | Find | View 100 | First 1-10 of 144 Last

Role Name	Description	Dynamic		View Definition	
AM Administrator	Absence Mngmnt Administrator	☐	Route Control	View Definition	+ -
AWE Administrator	AWE Administrator	☐	Route Control	View Definition	+ -
AppServer Administrator	AppServer Administrator	☐	Route Control	View Definition	+ -
Applicant	Internal Applicant	☐	Route Control	View Definition	+ -
Benefits Administrator	[WF] Benefits Administrator	☐	Route Control	View Definition	+ -
Compensation Adminis	Compensation Administrator	☐	Route Control	View Definition	+ -
Directory Administrator	Directory Administrator	☐	Route Control	View Definition	+ -
E&G Administrator	Educ&Govt Administrator	☐	Route Control	View Definition	+ -
EOEN_USER	Events & Notifications User	☐	Route Control	View Definition	+ -
EOLT Implementer	EOLT Implementer	☐	Route Control	View Definition	+ -

Assign roles to user IDs on the User Profiles - Roles page

This diagram illustrates how a user's security profile is made up of assigned roles, and the permission lists assigned to those roles, as well as permission lists assigned directly to the user:



User security profiles are made up of the combined permissions of the roles and permission lists assigned to them

See

See *Enterprise PeopleTools PeopleBook: Security Administration*, "Administering User Profiles"

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Understanding Data Permission Security for HRMS

Data permission security refers to controlling access to the rows of data in your system. In PeopleSoft HRMS, you can control access to the following types of data:

- People.
 - Employees.
 - Contingent workers.
 - People of interest (POIs) with jobs.
 - People of interest (POIs) without jobs.

Note. The data of people of interest without jobs is secured differently from the data of people with jobs.

- Recruiting job openings.
- Departments.

Note. Row security for departments secures department budgets and positions, if you are using Manage Positions. The Departments component is not secured by data permission so control access to department definitions by restricting access to the component or change the search record to DEPT_SEC_SRCH.

Data Security and Data Retrieval

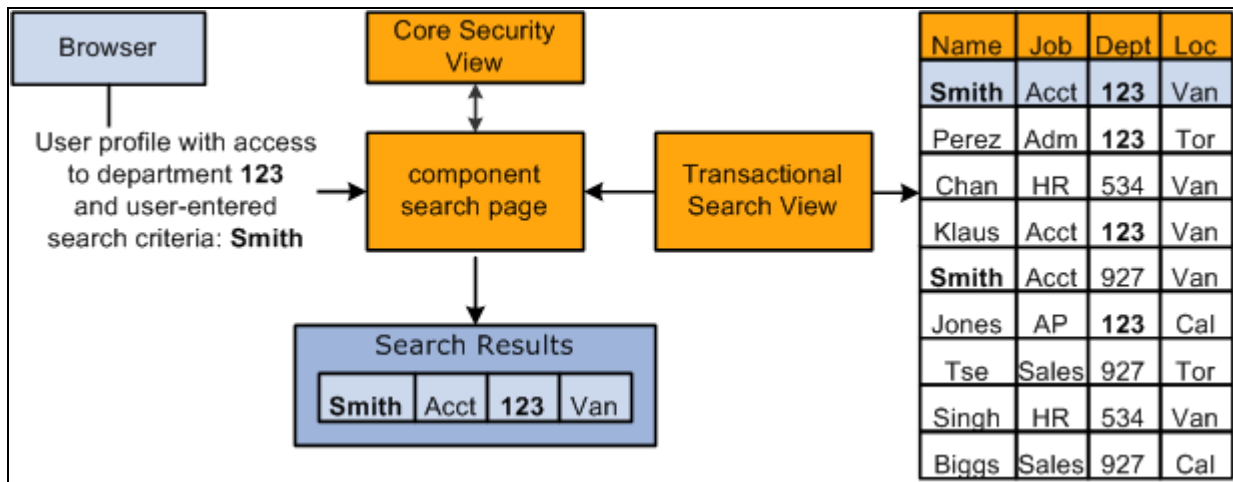
The system enforces data permission security with security search views. To understand how this is done it helps to understand how the system retrieves data when you access a component.

When you open a component in PeopleSoft HRMS the system displays a search page. The search page represents the search record and the fields that appear are the search keys and alternate key fields that uniquely identify each row of data. The system uses the information that you enter in the key or alternate key fields to select the rows of data that you want to view or manipulate (except for the Add action, where you enter a key and the system creates a new data row). For example, a search page may have EmplID as a key field and Name as an alternate key. If you enter *Smith* in the Name field, the system retrieves all data rows with Name field data that matches *Smith*.

The system also uses search records to enforce data permission security. Search views for components that contain sensitive data also contain a security view to control data access.

The system adds the user's security profile, including their user ID and the values of the permission lists attached to their user profile, to the SQL (Structured Query Language) select statement along with the values that the user entered on the search page. The system retrieves the data that matches the criteria from the search page and the user's data permission lists. The system doesn't retrieve data for people to whom you haven't granted the user's permission lists data access.

Using the above example, if you enter *Smith* in the Name alternate key field, the system retrieves data only for the people with the name *Smith* to whom you have access, which are workers in department 123. Workers with the name of *Smith* outside of your security permission, department 123, are not retrieved or accessible to you as the user. This diagram illustrates the data retrieval process:



User profile information, search criteria, and the security view enforce data permission security

Note. Security for process and queries is enforced in much the same way.

Not all PeopleSoft HRMS components require data permission security. Their security requirements can be met using application security (restricting access to the entire page, component, or menu). Only components containing sensitive information, such as salary information, use the security search views. If necessary, you can add data permission security to any component that accesses person data, as long as the search records are defined as SQL views (some search records are defined as SQL tables).

A component can have only one search record. To associate more than one search record with a component (for example, data level security for some users and not for others), you reinstall the component on different menus, one for each search record, and grant access to the appropriate component using application security.

Core Security Views

PeopleSoft delivers the following core security views for components tracking people:

Security Views for Components Storing All Person Types			
Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	Yes	PERALL_SEC_SRCH	One row per EMPLID and distinct search items. Includes future-dated rows.
SQR view	No	PERALL_SEC_SQR	One row per EMPLID.
Query view	No	PERALL_SEC_QRY	One row per EMPLID.

Security Views for Components Storing People With Jobs			
Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	Yes	PERS_SRCH_GBL	One row per EMPLID and EMPL_RCD combination, effective date, and distinct search items. Includes future-dated rows.
Component search view	Yes	PERS_SRCH_EMP	One row per EMPLID for employees only. Includes future-dated rows.
Component search view	No	PERS_SRCH_CURR	One row per EMPLID.
SQR view	No	FAST_SQR_SEC_VW	One row per EMPLID.
Query view	No	PERS_SRCH_QRY	One row per EMPLID.
Prompt view	No	EMPL_ACTV_SRCH	One row per EMPLID for people with current, active (as of the system date) job records.
Prompt view	No	WORKER_PROMPT	One row per EMPLID for employees and contingent workers with current, active (as of the effective date of the component) job records.

Security Views for Components Storing People With Potentially More Than One Job Data Record			
Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	Yes	EMPLMT_SRCH_GBL	One row per EMPLID and EMPL_RCD combination, effective date, and distinct search items. Includes future-dated rows.
Component search view	Yes	EMPLMT_SRCH_EMPbe	One row per EMPLID and EMPL_RCD combination for employees only. Includes future-dated rows.
SQR View	Yes	FAST_SQRFUT_SEC	One row per EMPLID. Includes future-dated rows.
SQR view	No	FAST_SQR_SEC_VW	One row per EMPLID and EMPL_RCD combination.

Security Views for Components Storing People With Potentially More Than One Job Data Record			
Type	Includes Future-Dated Security	Security View	Rows Returned
Query view	No	EMPLMT_SRCH_QRY	One row per EMPLID and EMPL_RCD combination.
Prompt view	No	PERJOB_PROMPT	One row per EMPLID for people with current, active (as of the effective date of the component) job records.

Security Views for Components Storing People Without Jobs			
Type	Includes Future-Dated Security	Security View	Rows Returned
Component search view	N/A	POI_SEC_SRCH	One row per EMPLID, POI_TYPE and distinct search items.
SQR view	N/A	POI_SEC_SQR	One row per EMPLID and POI_TYPE.
Query view	N/A	POI_SEC_QRY	One row per EMPLID and POI_TYPE.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

Security Data

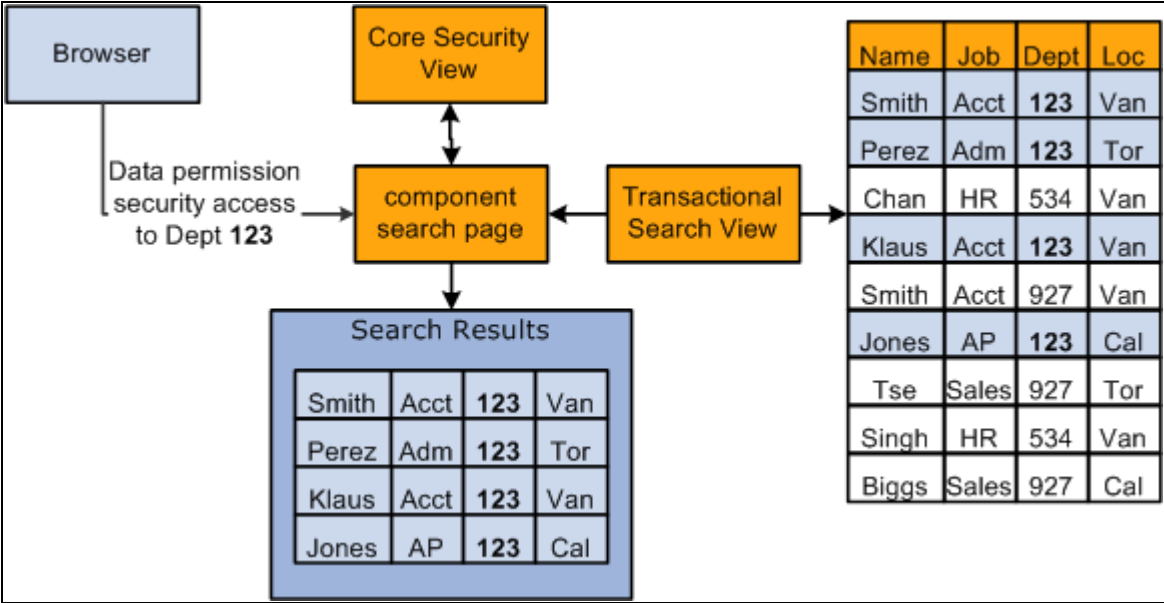
Data permission is controlled on two sides: transaction and user.

Transaction Security Data

Transaction data is the data that is being secured. Certain transaction fields on a transaction data row are used to secure access to that row. The data in these fields is called transaction security data. When the value of the transaction security data matches the value that a user can access (user security data), the system makes the entire row of data available to the user.

When the user accesses the component search page the security search view filters the data rows, displaying only the rows of data with the same transaction security values that the user has access to.

This diagram shows the Department field being used as transaction security data to secure the data of people in the organization in which the user only has security access to the workers in department 123:



The department field is the transaction value securing the data rows

This table lists where you enter and maintain transaction data, to which record the transaction data is saved, and which fields can be used as transaction security data:

Data Type	Transaction Component in which Data is Entered or Maintained	Record Storing Transaction Data	Fields Available for Transaction Security Data
Departments	Departments component (DEPARTMENT_TBL)	DEPT_TBL	- SetID - Department
Job openings	Job Opening page (HRS_JO_360)	HRS_JOB_OPENING	- Company - Business Unit - DeptID - Location

Data Type	Transaction Component in which Data is Entered or Maintained	Record Storing Transaction Data	Fields Available for Transaction Security Data
- Employees - Contingent workers - POIs with jobs	- Add Employment Instance component (JOB_DATA_EMP) - Add Contingent Worker Instance component (JOB_DATA_CWR) - Add POI Instance component (JOB_DATA_POI) - Job Data component (JOB_DATA)	JOB	- Organizational Relationship (employee, contingent worker, or POI) - Regulatory Region - Company - Business Unit - Department - Location - Salary Plan - Pay Group (for customers using Payroll for North America)
POIs without jobs	- Add a POI Relationship component (PERS_POI_ADD) - Maintain a Person's POI Reltn component (PERS_POI_MAINTAIN)	PER_POI_SCRTY	- POI Type - POI Type and Business Unit - POI Type and Institution - POI Type and Company

Note. All people, regardless of type, are first entered in the Add a Person component (PERSONAL_DATA), where you enter their personal information and assign them an ID. These pages do not capture any transaction security data. Transaction security data is captured on the components that you use to enter details about the person's relationship to the organization.

Note. If you create a person but do not create a job data record or POI type record for them the system will save the person as a POI without job with a POI Type of *Unknown*. Somebody in your organization must have data permission access to unknown POIs in order to access their data and create either a job data or POI type record for them, otherwise the data is inaccessible.

Make sure that users who enter people into the system understand the consequences of not *creating* and *saving* a Job Data or POI type record for new people at the time the person is entered in the system.

When a transaction record is successfully completed and saved for the person on the Add an Employment Instance component, Add a Contingent Worker component, Add a POI Instance component, or Add a POI Reltn. component, the system deletes the Unknown POI instance for that person.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Adding a Person.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Controlling Data Access for POIs Without Jobs.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs.

User Security Data

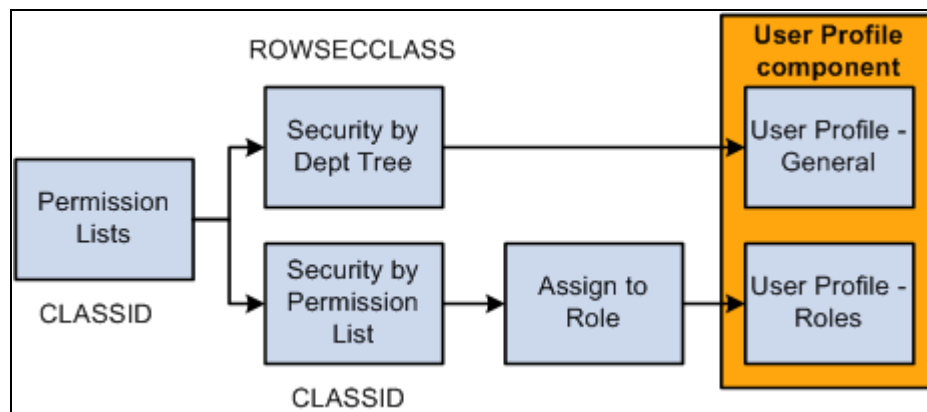
User security data is the data about a user's security access. It enables the system to ensure that users have access only to that which you have granted them access. User security data for HRMS data permission is the data permission that you assign to permission lists and the roles and users to whom you assign the permission lists.

Data permission is granted to row security (tree-based) permission lists (ROWSECCLASS) and regular (role-based) permission lists (CLASSID). Both permission lists are created using the Permission Lists component and Copy Permission Lists component.

When you create a permission list on the Permission Lists component you can assign security to a number of different aspects of the application. Data permission is assigned separately on the Security by Dept Tree page and Security by Permission List page.

Note. When you add a permission list to the Security by Dept. Tree component, the system saves it as ROWSECCLASS.

This diagram shows that permission lists are created, assigned data permission (using either security by department tree or security by permission list), and then assigned to a user directly on the User Profile - General page as the Row Security permission list or assigned to a user on the User Profile - Roles page by assigning roles to the user, which are associated with permission lists:



Create permission lists, assign to them data permission, and assign them to users

This table lists the key differences between role-based permission lists with data permission and row security permission lists:

Row Security Permission Lists	Role-Based Permission Lists
Are assigned to users on the Row Security field on the User Profile – General page.	Are assigned to users by way of roles.

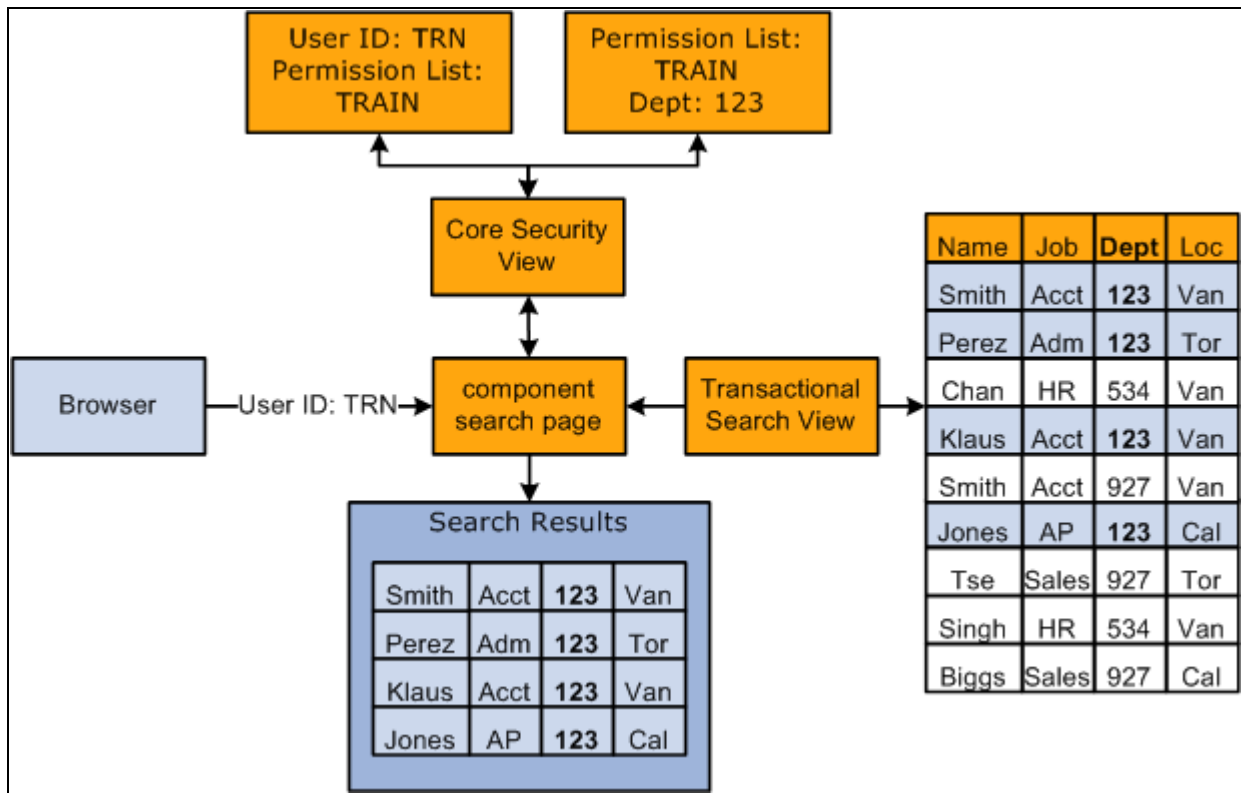
Row Security Permission Lists	Role-Based Permission Lists
Are limited to one per user.	Users can have multiple role-based permission lists and the combined data permission access of each list.
Bring with them only the data permission assigned to the user on the Row Security field on the User Profile - General page.	Bring with them data permission access assigned to them on the Security by Permission List page and any application security access granted to the permission list on the Permission Lists component. The user will not have access to any data permission assigned to them on the Security by Dept Tree page.
Should have only department security tree-based security.	Can have only non-department tree-based security.

Note. You can use the same permission list as a row security permission list and a role-based permission list by adding it to both the Security by Dept Tree component and Security by Permission List component and then adding them to the user on the User Profile - General page and by way of roles.

Note. The system recognizes non-tree based security associated with row security permission lists. Customers who modified the system to use non-tree based security in previous releases only have to import the customized table capturing the row security permission lists and security definitions into SJT_CLASS. You can continue to assign the permission lists to users in the Row Security field on the User Profile - General page.

New customers, or customers using non-tree based security for the first time, should use role-based permission lists. This will provide you much greater flexibility.

This diagram shows the search page determining which permission lists a user has and what data permission the list gives the user. The user, TRN, is associated with the permission list TRAIN for both row security and permission lists through roles. Since permission list TRAIN is granted access to worker's records in department 123 only, the search results will display only those workers from this department:



The system determines which permission lists a user has and what data permission is granted by the permission list before retrieving the matching data rows

This table lists where you enter and maintain user security data and to which record the user security data is saved:

Data Type	Security Page in which Data is Entered or Maintained	Record Storing User Security Data
Row security permission lists	Security by Dept Tree page	SCRTY_TBL_DEPT This data is loaded into SJT_CLASS_ALL
Role-based permission lists	Security by Permission List page	SJT_CLASS This data is loaded into SJT_CLASS_ALL
Permission lists assigned to roles	Roles - Permission Lists page	PSROLECLASS This data is loaded into SJT_OPR_CLS.
Roles assigned to users	User Profile - Roles page	PSROLEUSER This data is loaded into SJT_OPR_CLS

Data Type	Security Page in which Data is Entered or Maintained	Record Storing User Security Data
Row security permission lists assigned to users	User Profile - General page	PSOPRDEFN This data is loaded into SJT_OPR_CLS

Note. The data from PSROLECLASS, PSROLEUSER, and PSOPRDEFN is loaded into SJT_OPR_CLS either automatically by the system, when you enable the USER_PROFILE and ROLE_MAINT messages, or when you run the Refresh SJT_OPR_CLS process.

See [Chapter 5, "Setting Up and Administering HRMS Security," Understanding PeopleSoft Security, page 39](#) :

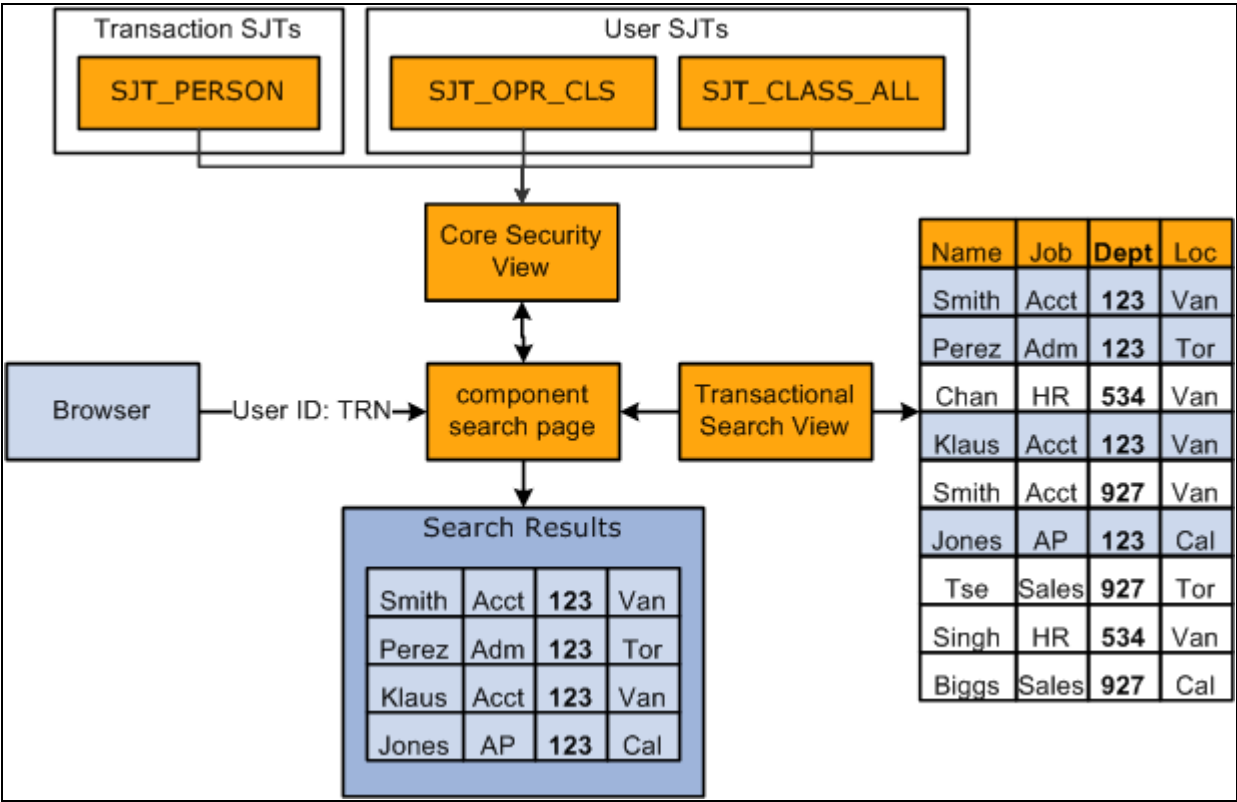
See [Chapter 5, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 81](#).

See [Chapter 5, "Setting Up and Administering HRMS Security," Assigning Role-Based Data Permission Security to Permission Lists, page 90](#).

Security Join Tables

The system stores security data in transaction and user security join tables (SJTs). When you access a transaction component with a security search view, the security view references the security join tables to determine how the data is secured and what access the user has.

This graphic shows the search page determining which permission lists a user has and what data permission the list gives the user using either the transaction or user security join tables. The transaction security join table is determined by the type of data stored in the component:



The core security view uses the security data stored in the security join tables to determine which rows of data the user can access

Transaction Security Join Tables

Each transaction security join table stores the transaction data required to secure each row of data. The security join tables store one row of data for each unique combination of key fields.

There are four transaction security join tables:

Transaction Security Join Table	Description	Stores Data From:	Key Fields
SJT_PERSON SJT_PERSON_USF Note. SJT_PERSON is used by customers using the core job data components and SJT_PERSON_USF is used by customers using the USF job data components.	Contains transaction data for the people (employees, contingent workers, POIs with jobs, and POIs without jobs) in your HCM system.	JOB JOB_JR PER_ORG_ASGN PER_POI_SCRTY	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 EMPLID

Transaction Security Join Table	Description	Stores Data From:	Key Fields
SJT_DEPT	Contains the transaction data for the HCM departments.	DEPT_TBL	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 SETID DEPTID
HRS_SJT_JO	Contains the transaction data for the job openings in your system.	- HRS_JOB_OPENING - HRS_JO_RTEAM_VW	SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3 HRS_JOB_OPENING_ID

The key fields are:

- SCRTY_TYPE_CD (security access type code)

Security access types indicate which field is used for transaction security data. For example the security type 002 enables you to secure person data by location.

Security access types are unique to a security access set.

- SCRTY_KEY1, SCRTY_KEY2, and SCRTY_KEY3 (security keys)

The key security fields uniquely identify the security transaction data securing a row of data. The system determines the key fields by the security access type. For example, if person data is secured by location, then the key security fields are BUSINESS_UNIT (the prompt value for location) and LOCATION (the third key field isn't required for this example).

- EMPLID

A person's unique identifying number that is assigned to them on the Personal Data pages.

- SETID and DEPTID

A department's setID and department ID.

- HRS_JOB_OPENING_ID

A job opening's unique identifying number, which is assigned to it on the Job Opening page.

Each table stores additional fields depending on the type of security you are using.

For example, if you are securing the data of people with jobs using the security access type Job Department Tree (001), the key fields of the security join table SJT_PERSON looks like this:

<i>SCRTY_TYPE_CD</i>	<i>SCRTY_KEY1</i>	<i>SCRTY_KEY2</i>	<i>SCRTY_KEY3</i>	<i>EMPLID</i>
001	department setID: SHARE	department ID: 123	N/A	IN3321
001	department setID: SHARE	department ID: 534	N/A	IN7894
001	department setID: USA	department ID: OKL	N/A	US8390

If you used two security access types, for example Job Location (002) and Job Department Tree, SJT_PERSON looks like this:

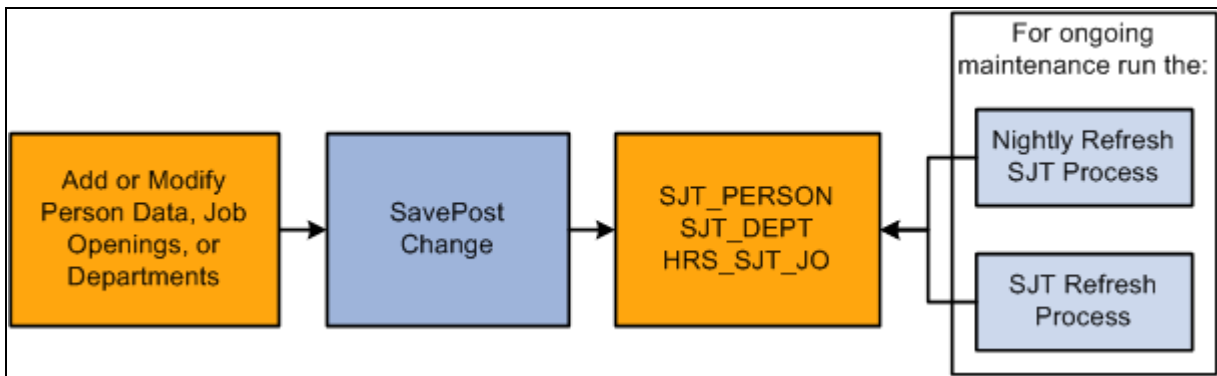
<i>SCRTY_TYPE_CD</i>	<i>SCRTY_KEY1</i>	<i>SCRTY_KEY2</i>	<i>SCRTY_KEY3</i>	<i>EMPLID</i>
001	department setID: SHARE	department ID: 123	N/A	IN3321
002	location business unit: FRA01	location code: PAR	N/A	IN3321
001	department setID: SHARE	department ID: 534	N/A	IN7894
002	location business unit: AUS01	location code: SYD	N/A	IN7894
001	department setID: USA	department ID: OKL	N/A	US8390
002	location business unit: USA	location code: KSC	N/A	US8390

Note. Locations and departments do not need three key fields to uniquely identify them so the third security key field isn't necessary for this example.

When you first enable a security access type, load the transaction data into security join tables using the SJT Refresh process. After the initial load, the system updates the tables using SavePostChange PeopleCode when you make a change to the transaction security data in the transaction components. You can also capture any changes the PeopleCode misses by running the SJT Refresh process as needed or the Nightly Refresh process.

Note. The SavePostChange PeopleCode on the transaction component subpage SCRTY_SJT_SBP updates the security join tables.

This graphic illustrates how the transaction security join tables are kept up to date, as described above:



Keep the transaction security join tables up to date through refresh processes

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Nightly Refresh Process, page 99.](#)

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 100.](#)

User Security Join Tables

The user security join tables store the user security data required to determine users' data permission. The security join tables store one row of data for each unique combination of key fields.

There are two user security join tables:

<i>User Security Join Table</i>	<i>Description</i>	<i>Stores Data From:</i>	<i>Key Fields</i>
SJT_CLASS_ALL	Contains the data permission information for all the permission lists that are given data access on the Security by Dept Tree page or Security by Permission List page.	- SCRTY_TBL_DEPT - SJT_CLASS	CLASSID SCRTY_SET_CD SCRTY_TYPE_CD SCRTY_KEY1 SCRTY_KEY2 SCRTY_KEY3
SJT_OPR_CLS	Contains the user IDs of people with data permission and the permission lists with data permission that are assigned to them.	- PSOPRDEFN - PSROLEUSER - PSROLECLASS	OPRID CLASSID

In addition to the security access type field and security key fields, the user security join tables store the following fields:

- SCRTY_SET_CD (security set code)

A security set is a set of data secured in HRMS. For example, PPLJOB is the security set for the data of people with jobs and DEPT is the security set for the department data. Each security set has security access types.

- OPRID

The user's user ID.

- CLASSID

The ID of the role-based or row security permission list.

Note. The security join tables store row security permission lists (ROWSECCLASS) as CLASSID permission lists but identify them using a row security flag.

The permission list data in SJT_CLASS_ALL comes from two sources:

- SCRTY_TBL_DEPT

When you add tree-based data permission to a permission list, you use the Security by Dept Tree page and the system saves the permission list information to the SCRTY_TBL_DEPT record.

- SJT_CLASS

When you add non-tree based data permission to a permission list, you use the Security by Permission List page and the system saves the permission list information to the SJT_CLASS record.

For example, if you are securing the data of people with jobs using the security access type Job Department Tree (001), the key fields of the SCRTY_TBL_DEPT table look like this:

ROWSECCLASS	SETID	DEPTID
TRAIN	department setID: SHARE	department ID: 123
PAY1	department setID: SHARE	department ID: 534
PAY2	department setID: USA	department ID: OKL

To load the data from the SCRTY_TBL_DEPT table, you need to run the Refresh SJT_CLASS_ALL process. In SJT_CLASS_ALL, the Refresh SJT_CLASS_ALL process:

- Creates a row of data for each enabled, tree-based security access type (and it's security set) with the data permission you set up on the Security by Dept Tree page.

For example, if you enable security access type 012 (RS Dept Id) and security access type 001 (Job Department Tree) and grant the row security permission list TRAIN data permission to department 123, the process will create a row for each security access type and the permission will have access to people with jobs in department 123 and job openings in department 123.

- Saves the row security permission list as a CLASSID permission list.
- Saves the department setID as SCRTY_KEY1 and the department ID as SCRTY_KEY2.

If you are securing the data of people with jobs using the security access type Job Location (002), the key fields of the security join table SJT_CLASS look like this:

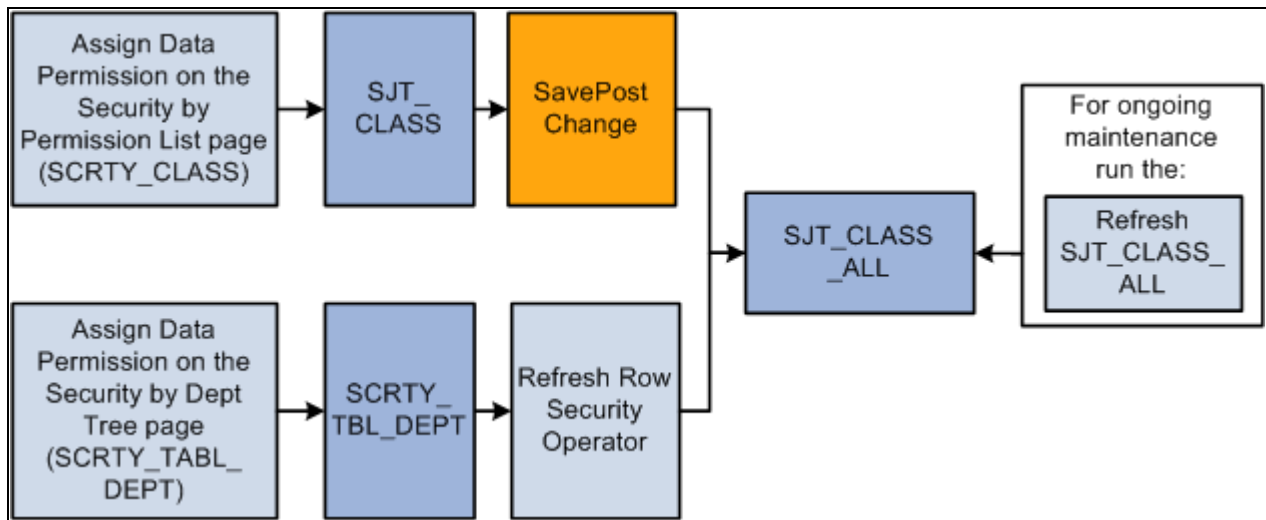
CLASSID	SCRTY_SET_CD	SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3
TRAIN	PPLJOB	002	location business unit: FRA01	location code: PAR	N/A
PAY1	PPLJOB	002	location business unit: AUS01	location code: SYD	N/A
PAY2	PPLJOB	002	location business unit: USA	location code: KSC	N/A

When you save your changes on the Security by Permission List page, SavePostChange PeopleCode automatically updates the data to the security join table SJT_CLASS_ALL.

If you are using both security access types, SJT_CLASS_ALL looks like this after you have run the Refresh SJT_CLASS_ALL process and the PeopleCode has updated it:

CLASSID	SCRTY_SET_CD	SCRTY_TYPE_CD	SCRTY_KEY1	SCRTY_KEY2	SCRTY_KEY3
TRAIN	PPLJOB	001	department setID: SHARE	department ID: 123	N/A
TRAIN	PPLJOB	002	location business unit: FRA01	location code: PAR	N/A
PAY1	PPLJOB	001	department setID: SHARE	department ID: 534	N/A
PAY1	PPLJOB	002	location business unit: AUS01	location code: SYD	N/A
PAY2	PPLJOB	001	department setID: USA	department ID: OKL	N/A
PAY2	PPLJOB	002	location business unit: USA	location code: KSC	N/A

This graphic illustrates how the permission list user security join tables are kept up to date, as previously described:



Keep the operator security join table up to date

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 102.](#)

The security join table SJT_OPR_CLS stores the relationship between User IDs and permission lists with data permission. The data in SJT_OPR_CLS comes from three sources:

- PSOPRDEFN

This record contains the relationship between the User ID and row security permission list from the User Profile - General page.

- PSROLEUSER

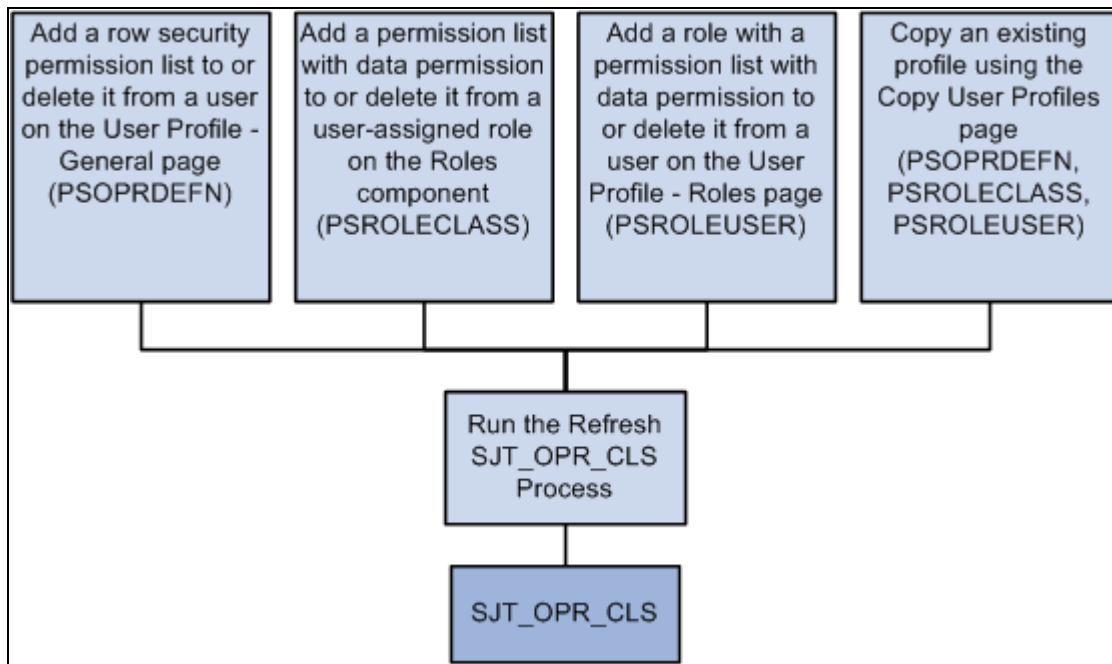
This record contains the relationship between the User IDs and roles from the User Profile - Roles page.

- PSROLECLASS

This record contains the relationship between roles and permission lists from the Roles - Permission Lists page.

To update SJT_OPR_CLS with the data from PSOPRDEFN, PSROLECLASS, and PSROLEUSER, run the Refresh SJT_OPR_CLS process whenever you add a permission list with data security to a user profile (either by adding a row security permission list on the User Profile - General page, by adding a role-based permission list with data permission to a user-assigned role on the Roles - Permission Lists page, adding a role with data permission on the User Profile - Roles page, or by creating a new user profile by copying an existing one) or delete one from a user profile.

This graphic illustrates this process of when to update the user profile security join table:



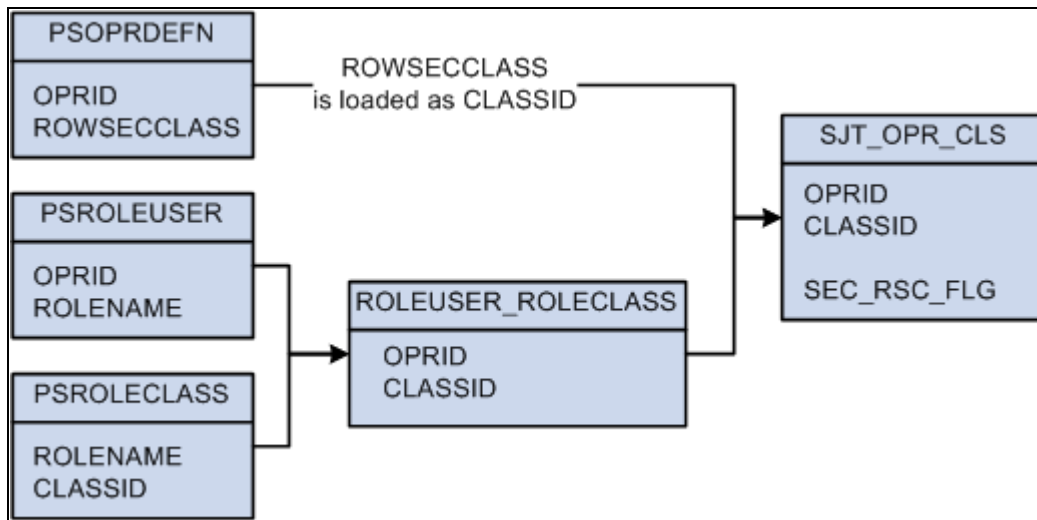
Run the Refresh SGT_OPR_CLS process to keep the SGT_OPR_CLS up to date

Note. You can enable the USER_PROFILE message and the local subscription HCM_Refresh_SGT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SGT_OPR_CLS to automatically update SGT_OPR_CLS. PeopleSoft does not deliver the system with these messages enabled.

The Refresh SGT_OPR_CLS process loads the OPRID and ROWSECCLASS values from PSOPRDEFN directly into SGT_OPR_CLS, saving the row security permission list as CLASSID.

To establish the relationship between user profiles and role-based permission lists, the process first loads the OPRID and ROLENAM from PSROLEUSER and the ROLENAM and CLASSID from PSROLECLASS into a temporary table (ROLEUSER_ROLECLASS) and then loads the OPRID and CLASSID, and the relationship between them, into SGT_OPR_CLS.

This diagram illustrates the data stored in SGT_OPR_CLS and their source as described above:



SJT_OPR_CLS stores the relationship between user profiles and permission lists

Note. The SEC_RSC_FLG field indicates if the CLASSID was originally a ROWSECCLASS permission list by flagging it with a value of Y.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 103.](#)

Security Sets and Security Access Types

A security set is a grouping of data that is being secured. The sets differ by the origin of the transaction security data. For example, people of interest without jobs have a separate security set from people with jobs because the transaction data used to secure them does not come from the JOB record, but from the PER_POI_SCRTY record.

PeopleSoft delivers the following five security sets:

Security Set	Description	Security Join Table Storing Data
PPLJOB	People with Jobs Includes the data of any person who has a JOB record and all the associated data for that person.	SJT_PERSON
PPLUSF	People with Jobs for United States Federal Government Includes the data of any person who has a GVT_JOB record and all the associated data for that person.	SJT_PERSON_USF
PPLPOI	People of interest without jobs Includes the data of any person who does not have a JOB record and all the associated data for that person.	SJT_PERSON

Security Set	Description	Security Join Table Storing Data
DEPT	Departments Includes department budgets and positions.	SJT_DEPT
RSOPN	Job Openings Includes the data of job openings, including the data of applicants associated with a job opening.	HRS_SJT_JO

Note. PeopleSoft has delivered all the security sets you are likely to need. If you add new sets, it is considered a customization.

See [Chapter 5, "Setting Up and Administering HRMS Security," Viewing Security Sets, page 75.](#)

Security access types are ways of securing the data within a security set. Each security set has a number of security access types that you can choose to enable. Among other things, security access types determine:

- The security transaction data.
- If there is data security for future-dated rows.
- If the access type uses a department security tree.

Note. You can only set up department hierarchies on security trees and you can only grant security access by department tree to row security permission lists.

Security access types that don't use a department security tree do not have a hierarchical structure and require that you list each field value individually for each permission list.

The following table lists the security access types by security set:

Security Set	Security Access Types
PPLJOB	• Job Department Tree (001) • Job Location (002) • Job Business Unit (003) • Job Company (004) • Job Reg Region (005) • Job Salary Grade (014) • Person Organization (015) • Job - Deptid - non Tree (025) • Job - Company/Paygroup (032)

Security Set	Security Access Types
PPLUSF	• US Federal Department Tree (016) • US Federal Location (017) • US Federal Company (018) • US Federal Business Unit (019) • US Federal Salary Grade (020)
PPLPOI	• POI Business Unit (006) • POI Location (007) • POI Institution (008) • Person of Interest (009)
DEPT	• Departments by Tree (021) • Departments - non Tree (022) • Departments by Setid (023)
RSOPN	• RS Company (010) • RS Business Unit (011) • RS Dept Id (012) • RS Location (013) • Recruiting Team (031)

Note. PeopleSoft has delivered all the security access types you are likely to need. You can add new types but it requires a very good knowledge of the application and of SQL.

Security administrators can only assign data permission using the security access types that you enable.

See [Chapter 5, "Setting Up and Administering HRMS Security," Enabling Security Types, page 77.](#)

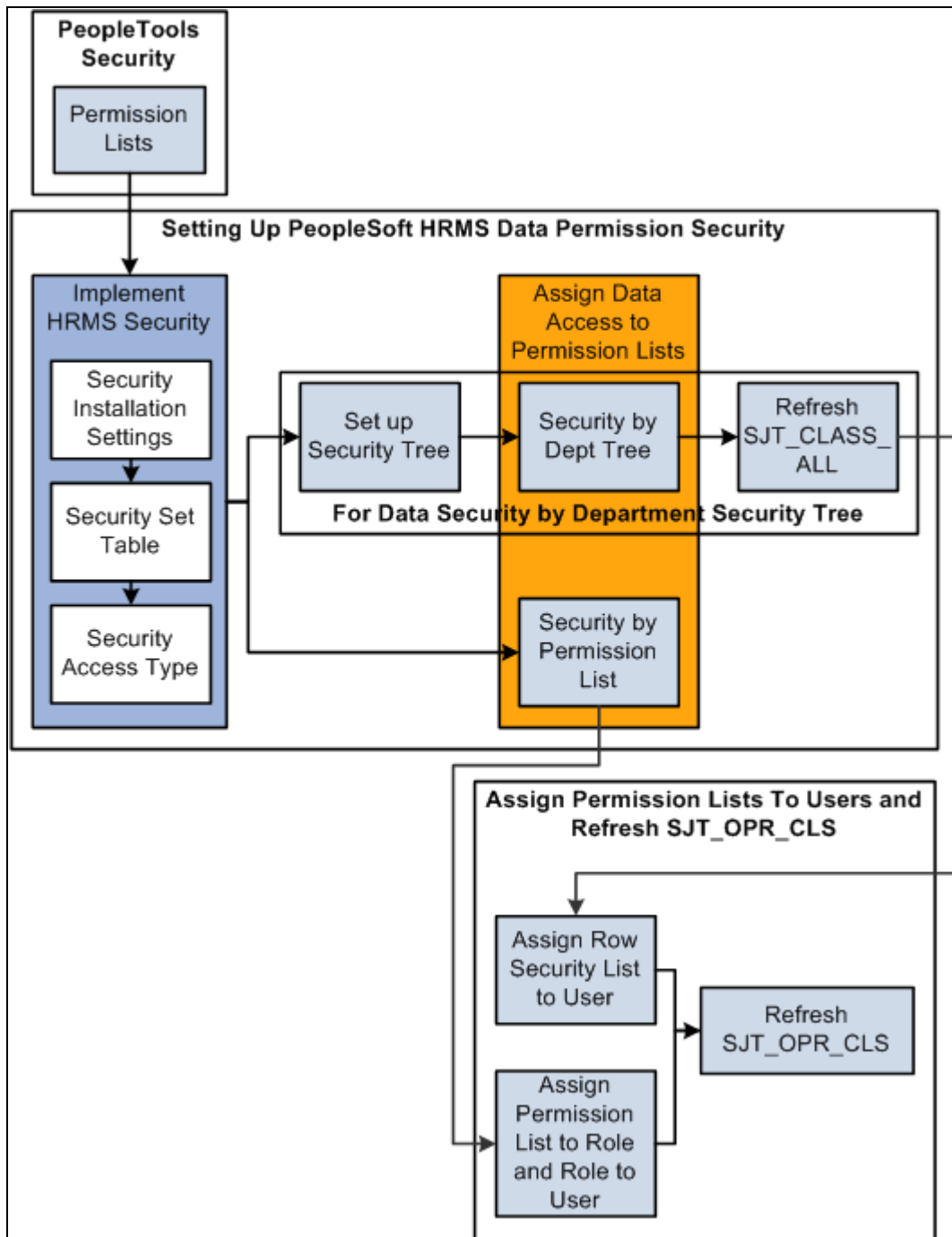
Enabling and Using Multiple Security Access Types

When you grant a permission list access to data in a security set using more than one security access type the security access creates a union, not a join or an intersect, with the two types. For example, if you enable the Job Company and Job Business Unit security access types for the PPLJOB security set and grant a permission list access to people in company A and people in business unit B, users with the permission list can access people in company A or people in business unit B; their access is not restricted to people in both business unit B and company C.

Note. See the security white paper posted on My Oracle Support for information about creating security access types that join transaction fields to secure data.

HRMS Security Process Flow

When you set up HRMS data permission security you will follow this process flow, which is detailed below:



Setting up PeopleSoft HRMS data permission security

To set up HRMS data permission:

1. Set up permission lists in the PeopleTools pages.

2. Set the security installation settings on the Security Installation Settings component.
3. Review security sets on the Security Set Table component.
4. Enable security access types on the Security Access Type component.
5. Assign data permission to permission lists:
 - If you are using security tree-based security access types, set up a security tree, assign data permission on the Security by Dept Tree component, and refresh SJT_CLASS_ALL.
 - If you are using non-tree based security access types, assign data permission on the Security by Permission List component.
6. Assign permission lists to users (by way of roles if you are using role-based permission lists or directly to the user profile if you are using row security permission lists).
7. Refresh SJT_OPR_CLS.

Example of HRMS Data Permission

Grant the following security to these permission lists:

<i>Permission List</i>	<i>Page</i>	<i>Security Access Type</i>	<i>Security Value</i>
JobByDept	Security by Dept Tree page	Job Department Tree (001)	department 10100 (you must select setID SHARE as the first key)
JobByLoc	Security by Permission List page	Job Location (002)	location UK1 (you must select business unit GBR01 as the first key)
MyJobs	Security by Dept Tree page	Job Department Tree (001)	department 11000 (setID SHARE)
	Security by Permission List page	Job Location (002)	location USA (business unit GBL01)

Grant the permission lists to the following roles:

<i>Role</i>	<i>Permission List</i>	<i>Outcome</i>
Role 1	JobByDept	Role 1 has no access because tree-based department security (security access type 001) does not work with roles.
Role 2	JobByLoc	Has access to people with jobs in location UK1.

Role	Permission List	Outcome
Role 3	MyJobs	Has access to people with jobs in location USA. Does not have security access to department 11000.

Grant the following row security permission lists and roles to users:

User ID	Row Security Permission List	Role	Has Access to People with Jobs In:
User A	JobByDept		department 10100.
User B	JobByDept	Role 2	department 10100 location UK1.
User C		Role 2	location UK1.
User D		Role 3	location USA
User E	MyJobs		department 11000 location USA.
User F		Role 1	Has no access.
User G	JobByDept	Role 2 Role 3	department 10100 location UK1 location USA.

Implementing Data Permission Security

To implement data permission security, use the Security Installation Settings component (SCRITY_INSTALL), the Security Sets component (SCRITY_SET_TBL), and the Security Access Type component (SCRITY_TYPE2_TBL).

This section discusses how to:

- Install HRMS security.
- View security sets.
- Set up update groups.
- Enable security types.
- Enter SQL statements.

Understanding Future-Dated Security

The Security Installation Settings page enables you to select actions that, when used on the Work Location page (JOB_DATA1), trigger the SavePostChange PeopleCode to create a future-dated row in SJT_PERSON.

The system normally secures data using the current transaction security data. Only users with data permission access to the transaction security data on the current row can access the person's data.

When you include future-dated transaction security data rows the system uses both the current data and the future-dated values to secure the data. This gives users with data permission access to the transaction security data on the current row and users with data permission access to the transaction security data on the future-dated row access to the person.

The system only creates future-dated security rows in SJT_PERSON when you:

1. Select one or more actions on the Security Installation Settings page.
2. Enable future-dated rows for the security access type.

Note. This enables you to use future-dated security with some types but not others.

3. Create and save a future-dated row in a component that uses the JOB record using one of the actions you selected on the Security Installation Settings page.

If you have selected the action of *Transfer* in the Actions that trigger Future Dated Security Rows grid, then when you create a future-dated Job Data row with the action of *Transfer* for a person, the system will add a row to the SJT_PERSON with the transaction data from the new row. Users with data permission to the future-dated transaction security data will have access to the person's data.

Note. Only component security views use future-dated security rows.

For example, as of January 1, 2005 Kenny Wong works in department 42000. Starting July 1, 2006 he will transfer to department 44000. On April 15, 2006, in anticipation of the transfer, the HR administrator enters a future-dated job data row for the transfer.

Julie Sparrow manages department 42000 and Barry Deere manages department 44000 and each has data permission to the people in their departments.

As of April 15, 2006 Kenny Wong has the following two job data rows:

Effective Date	Action	Department
January 1, 2005	Hire	42000
July 1, 2006	Transfer	44000

The data permission depends on if you are using future-dated security for that security access type and if you have selected the action of *Transfer* on the Security Installation Settings page:

- If you have *not* selected it:
 - The SavePostChange PeopleCode does not update SJT_PERSON with the new department information from the future-dated row because it is not yet effective.

Note. When the transfer row does become effective, the Nightly SJT Update process updates SJT_PERSON, overwriting the old row with the new row.

- Julie can access Kenny's data until June 30, 2006 and Barry can access it starting July 1, 2006.
- If you *have* selected it:
 - The SavePostChange PeopleCode creates a new row in SJT_PERSON with the future-dated transaction security data. The system identifies this row as future-dated.

Note. When the transfer row becomes effective, the Nightly SJT Update process updates SJT_PERSON, removing the old row and making the future-dated row current.

Note. Search views that don't use future-dated security will not use the future security row when enforcing data permission.

- Julie can access Kenny's data until June 30, 2006 and Barry can access it starting April 15, 2006.

Understanding Special Job Security Options

Without special job security options, the system creates a single transaction security data row for each unique combination of ID and employment record number. When you use special job security options, the system creates additional rows in SJT_PERSON with different security key values to enable access to rows to which a permission list would normally not have access.

For example, if you are securing data by department and have enabled people with access to the home job data record to view the host job data record but are *not* allowing people with access to the host job data record to view the home job data record, the system will create the following three rows of data in SJT_PERSON (only the relevant columns are shown) for a person whose home job data record (employee record number 0) is in department 25000 and whose host job data record (record number 1) is in department 20000:

Key 1	Key 2	Empl ID	Empl Record	Home/Host	Intl. Type
SHARE	25000	K0G019	0	Home	
SHARE	25000	K0G019	1	Host	Home-Host
SHARE	20000	K0G019	1	Host	

The system creates the row marked Home-Host to grant the special job security option. By creating a row for the host record with the department value of the home record, people with data permission to the home record can access the host record.

The system works the same way for the other special security options, creating an additional row and inserting the key values that enable the access.

Pages Used to Implement Data Permission Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Installation Settings	SCRTY_INSTALL	Set Up HRMS, Security, Core Row Level Security, Security Installation Settings, Security Installation Settings	Choose the HRMS security settings for your installation.
Security Set Table	SCRTY_SET_TBL	Set Up HRMS, Security, Core Row Level Security, Security Sets, Security Set Table	Review existing security sets and the security access types you've attached to them.
Security Update Groups	SCRTY_SJT_UPD	Set Up HRMS, Security, Core Row Level Security, Security Sets, Security Update Groups	Define the data groups that can be updated by the SJT Refresh process.
Security Type Table	SCRTY_TYPE2_TBL	Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type Table	Use to enable or modify existing security access types or create new ones.
Security Type SQL	SCRTY_TYPE2_SQL	Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type SQL	Use to enter the SQL statements for the new security types.

Installing HRMS Security

Access the Security Installation Settings page (Set Up HRMS, Security, Core Row Level Security, Security Installation Settings, Security Installation Settings).

Security Installation Settings

Special Job Security Versions

☒ **Include Home/Host Access?**

Home can see Host

☒ **Incl Additional Assignments?**

Both

☒ **JPN Appointment**

Actions that trigger Future Dated Security Rows		Customize Find 1-15 of 15	
*Action	Action Description		
ADD	Add Contingent Worker	+	-
ADL	Additional Job	+	-
ASG	Assignment	+	-
HIR	Hire	+	-
JRC	Job Reclassification	+	-
POI	Add Person of Interest	+	-
POS	Position Change	+	-

Security Installation Settings page

Special Job Security Versions

The options you select here will be available for your installation but will not be enabled unless you select them again for the security access types you are using. This enables you to use the security versions for some security access types and not others.

Include Home/Host Access?

This option is for tracking global assignments. When an employee is on assignment they have a host record and a home record. Select one of the following options:

- *Home can see Host:* Select to enable a person with data permission that enables them to view the home record to also view the employee's host record. A person with just data permission to the host record will not be able to see the employee's home record.
- *Host can see Home:* Select to enable a person with data permission that enables them to view the host record to also view the employee's home record. A person with just data permission to the home record will not be able to view the host record.
- *Both:* Select to enable a person with data permission to the home record to view the host record and a person with data permission to the host record to view the home record.

If you do not select Include Home/Host Access? then regular data permission rules apply.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Track Global Assignments*, "Tracking Assignments."

Incl. Additional Assignments?

This option is for workers with additional assignments added using the Job Data Concurrent component (JOB_DATA_CONCUR).

When a worker has an additional assignment, they have a controlling employee or contingent worker instance with an active job data record and an additional assignment job data record. Select one of the following options:

- *Assignment can see Instance:* Select to enable a person with data permission that enables them to view the assignment job data record to also view the person's controlling instance job record. A person with data permission to the controlling instance job data record will not be able to see the worker's assignment job data record.
- *Instance can see Assignment:* Select to enable a person with data permission that enables them to view the controlling instance job record to also view the person's assignment job data record. A person with data permission to the assignment job data record will not be able to see the worker's controlling instance job data record.
- *Both:* Select to enable a person with data permission that enables them to view the controlling instance job record to also view the assignment job data record and a person with data permission that enables them to view the assignment job data record to also view the controlling instance job record.
- *None:* Select to make additional assignments job data records available to all users.

If you do not select Incl. Additional Assignments? then regular data permission rules apply.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Adding Additional Assignments.

JPN Appointment

(JPN) Select so that users who have access to the additional appointment of a worker can access the main appointment record for that worker.

The system assigns some additional assignments (Kenmu) to a particular EmplID and record called a *main appointment*, the job you can access through the Job Data pages.

If you do not select JPN Appointment? then regular data permission rules apply.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up Security for Tracking Additional Appointments.

Actions that trigger Future-Dated Security Rows

Select the actions that will trigger the SavePostChange PeopleCode in the components using the JOB record to create a future-dated security row in SJT_PERSON when they are used in a future-dated row in the Job Data pages. The system will not create security rows for future-dated rows with actions other than those listed here.

To create future-dated rows, you need to select the Include Future Dates check box on the Security Type Table. This enables you to use future-dated security for some security access types and not others.

Viewing Security Sets

Access the Security Set Table page (Set Up HRMS, Security, Core Row Level Security, Security Sets, Security Set Table).

The screenshot displays the 'Security Set Table' page. At the top, there are tabs for 'Security Set Table' and 'Security Update Groups'. The main section is titled 'Security Set' and contains the following information:

- Security Set:** DEPT
- Description:** Departments
- Short Description:** Department
- Comment:** Controls access to Department data.
- Object Owner ID:** HR Core Objects
- Transaction Sec Join Table:** SJT_DEPT
- SJT Temp Table (for AE process):** SJT_DEPT_TMP
- SQLID for Value Field List:** SEC_DEPT_FLDVAL, SETID, DEPTID, EFFDT

Below the main form is a table titled 'Security Access Types for this Set' with the following data:

Security Access Type	Description	Enabled
021	Departments by Tree	☒
022	Departments - non Tree	☐
023	Departments by Setid	☐

Security Set Table page

Object Owner ID

Security sets with a PeopleSoft Object Owner ID are system data and not available for modification on this page. You can still modify the Security Update Groups of delivered security sets.

Transaction Sec Join Table

The security join table that stores the transaction data for this security set.

Note. If you are creating a new security set, you must have created this table in Application Designer before creating the security set.

Creating a new security set requires modification of the system. Please refer to the Security white paper on My Oracle Support for directions.

SJT Temp Table (for AE process)

The temporary record used for PeopleSoft Application Engine. It is a copy of the transaction security join table and also contains the Application Engine process fields. This table updates the transaction security join field using the Application Engine process.

SQLID for Value Field List

The list of fields (not including the key fields) that are in the transaction security join table.

Generate SQL

Click to generate the SQL and SQLID for the value field list.

Security Access Types for this Set

The system lists the security access types for this security set and indicates which ones are enabled. Enable or disable security access types on the Security Type Table page.

See [Chapter 5, "Setting Up and Administering HRMS Security," Enabling Security Types, page 77.](#)

Setting Up Security Update Groups

Access the Security Update Groups page (Set Up HRMS, Security, Core Row Level Security, Security Sets, Security Update Groups).

The screenshot displays the 'Security Update Groups' page. At the top, there are tabs for 'Security Set Table' and 'Security Update Groups'. The 'Security Set' is currently set to 'DEPT', and the selected value is 'Departments'. Below this, there is a table with the following data:

*Rows to Update		+	-
1	Person Organization	+	-
2	Person of Interest Type	+	-
3	Security Type	+	-
4	List of EMPLID, Person Type	+	-

Security Update Groups page

Select which refresh options to make available when updating the security set using the SJT Refresh process. The system makes the options you select here available for this security set on the Refresh SJT page, enabling you to select portions of the security join table to update.

For example, you could refresh all the rows for external instructors by selecting the refresh option Person of Interest Type and the POI Type *External Instructors*.

Enabling Security Types

Access the Security Type Table page (Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type Table).

Security Type Table

Security Type SQL

Security Access Type

Security Type:

002

Job Location

Short Description:

Job Loc

Security Set:

PPLJOB

People with Jobs

☐ Enabled

☐ Include Future Dates

☒ Use Dept Sec Tree?

Transaction Table:

JOB

Security Key 1:

BUSINESS_UNIT

Prompt Rec for Sec Key 1:

BUS_UNIT_TBL_HR

Security Key 2:

LOCATION

Prompt Rec for Sec Key 2:

SEC_LOC_PR_VW

Security Key 3:

Prompt Rec for Sec Key 3:

Transaction Label:

JOB LOCATION

Transaction Sec Join Table:

SJT_PERSON

Special Job Security Versions

Type of International Security:

Type of Assignment Security:

☐ JPN Additional Appointment

Security Type Table page

You can enable more than one security access types for a security set and you can assign data permission access to a permission list using more than one access type.

Note. PeopleSoft has delivered the most asked for security access types and you should not need to create new types. Enable or disable the types your installation requires.

Please refer to the Security white paper on My Oracle Support for directions on how to create new security types.

Note. The more security access types you enable and options you use, the more rows of data the system stores in the security join tables. This affects system performance. PeopleSoft advises you to enable only the security types and options required to manage your data permission needs.

- Security Type

The system automatically numbers new security types.
- Transaction Label

Enter a field label. The system will display this label on a transaction page when the security access type is used as a field to gather data.

For example, if you are using fields in addition to POI type to control access to the data of POIs without jobs, the system will use the label you enter here on the Add a POI Type page and Edit POI Relationship page to prompt for security transaction values.

Security Set and Transaction Sec Join Table	The security set whose data you are securing and the security join table associated with the security set. See Chapter 5, "Setting Up and Administering HRMS Security," Viewing Security Sets, page 75.
Enabled	Select to enable the security type.
Include Future Dates	Select to enable the security join tables to store future-dated security rows for this type. The system will only update the security join tables with the future-dated rows that have the actions you selected on the Security Installation Settings page.
Use Dept Sec Tree?(use department security tree?)	Select if this security type uses the department security tree. You can only create department security trees for departments and can only grant data permission based on department security trees to row security permission lists.
Transaction Table	The transaction table that stores the field or fields that will control security for this type.
Special Job Security Versions	If you enable special job security versions on the Security Installation Settings page, enable the options for this security access type. See Chapter 5, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 72.
Security Key 1, Prompt Rec for Sec Key 1 (prompt record for security key 1), Security Key 2, Prompt Rec for Sec Key 2 (prompt record for security key 2), Security Key 3. and Prompt Rec for Sec Key 3 (prompt record for security key 3)	Define the security data fields for this type. The fields need to be on the Transaction Table record. The prompt record is the record the prompt field values come from when you are assigning values to a permission list. You must select all the records and fields necessary to make a unique qualification here. For example, to select a location (key 2), you first need to select a business unit (key 1). The prompt record for the BUSINESS_UNIT field is BUS_UNIT_TBL_HR and the prompt record for the LOCATION field is LOCATION_TBL.

Refreshing the Transaction Security Join Tables

You should refresh the transaction security join tables whenever you:

- Enable or disable a security access type.
- Enable or disable a future-dated security for an enabled security access type.
- Change the special job security versions for an enabled security access type.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 100.](#)

Entering SQL Statements

Access the Security Type SQL page (Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type SQL).

Security Type Table		Security Type SQL	
Security Access Type:	002	Job Location	
Transaction Table:	JOB	SJT Table:	SJT_PERSON
Sec Key 1 Fld:	BUSINESS_UNIT	Sec Key 2 Fld:	LOCATION
Sec Key 3 Fld:			
SQL Statements			
SQLID for Value Field List:	SEC_PPLCORE_FLDNM		Generate SQL
List of non-key fields in the Security Join Table for this Security Set. Usually the same for all Types in a Set.	,EMPLID , POI_TYPE , PER_ORG , EMPL_RCD , BUSINESS_UNIT , SETID_DEPT , DEPTID , SETID_LOCATION , LOCATION , COMPANY , REG_REGION , APPT_TYPE , HR_STATUS , EMPL_STATUS , OTHER_ID_JPN , REPORTS_TO , SUPERVISOR_ID , INSTITUTION , NATIONAL_ID , SETID_JOBCODE , JOBCODE , MAIN_APPT_NUM_JPN , ORG_INSTANCE_ERN , HOME_HOST_CLASS , PAY_SYSTEM_FLG , GP_PAYGROUP , PAYGROUP , MILITARY_SERVICE , MIL_RANK , MIL_WORN_RANK , EFFDT_NOKEY , EFFSEQ_NOKEY		
SQLID for Key Contents:	SEC_KEY_002_SEL		Generate SQL
The fields that will populate the SCRTY_KEY1, SCRTY_KEY2, and SCRTY_KEY3 in the Security Join Table. Should be the same as the prompt fields.	,BUSINESS_UNIT ,LOCATION ,''		

Security Type SQL page (1 of 3)

SQLID for Field Contents:	SEC_PPLJOB_FLDVAL		Generate SQL
The select field list for the non-key fields in the Security Join Table. Usually the same as the SEC_SQL_FLDNM except where a correlation name is needed or where the values are not in the transaction table for this type. The proper blank, 0, or %datenuil value should be entered then.	,JOB.EMPLID , JOB.POI_TYPE , JOB.PER_ORG , JOB.EMPL_RCD , JOB.BUSINESS_UNIT , JOB.SETID_DEPT , JOB.DEPTID , JOB.SETID_LOCATION , JOB.LOCATION , JOB.COMPANY , JOB.REG_REGION , JOB.APPT_TYPE , JOB.HR_STATUS , JOB.EMPL_STATUS , JR.OTHER_ID_JPN , JOB.REPORTS_TO , JOB.SUPERVISOR_ID , '' , '' , JOB.SETID_JOBCODE , JOB.JOBCODE , JOB.MAIN_APPT_NUM_JPN , PA.ORG_INSTANCE_ERN , PA.HOME_HOST_CLASS , JOB.PAY_SYSTEM_FLG , JOB.GP_PAYGROUP , JOB.PAYGROUP , '' , '' , '' , JOB.EFFDT , JOB.EFFSEQ		
SQLID for From Record:	SEC_PPLJOB_FROM		Generate SQL
The table where the data for this security Type comes from. Usually just the transaction record, but sometimes you may want to join in another table.	PS_JOB JOB, PS_JOB_JR JR, PS_PER_ORG_ASGN PA		
SQLID for Where:	SEC_PPLJOB_WHERE		Generate SQL

Security Type SQL page (2 of 3)

The where clause for this security access type. If the transaction record is effective dated, then you will need to add an effective date join here. If no join is needed, enter 1=1.	<pre>PA.EMPLID = JOB.EMPLID AND PA.EMPL_RCD = JOB.EMPL_RCD AND JOB.EFFDT = (SELECT MAX(EFFDT) FROM PS_JOB JOB2 WHERE JOB.EMPLID = JOB2.EMPLID AND JOB.EMPL_RCD = JOB2.EMPL_RCD AND JOB2.EFFDT <= %CurrentDateIn) AND JOB.EFFSEQ = (SELECT MAX(EFFSEQ) FROM PS_JOB JOB3 WHERE JOB.EMPLID = JOB3.EMPLID AND JOB.EMPL_RCD = JOB3.EMPL_RCD AND JOB.EFFDT = JOB3.EFFDT) AND JR.EMPLID = JOB.EMPLID AND JR.EMPL_RCD = JOB.EMPL_RCD AND JR.EFFDT =</pre>
Where-Future: The where clause for this access type if the Future dated transactions are needed. If Include Future is not checked on this type, this SQL does not need to be entered.	SEC_PPLJOB_FUTWHERE Generate SQL <pre>PA.EMPLID = JOB.EMPLID AND PA.EMPL_RCD = JOB.EMPL_RCD AND JOB.EFFDT IN (SELECT EFFDT FROM PS_JOB JOB4 WHERE JOB4.EMPLID = JOB.EMPLID AND JOB4.EMPL_RCD = JOB.EMPL_RCD AND JOB4.EFFDT > % CurrentDateIn) AND JOB.EFFSEQ = (SELECT MAX(EFFSEQ) FROM PS_JOB JOB3 WHERE JOB.EMPLID = JOB3.EMPLID AND JOB.EMPL_RCD = JOB3.EMPL_RCD AND JOB.EFFDT = JOB3.EFFDT) AND JR.EMPLID = JOB.EMPLID AND JR.EMPL_RCD = JOB.EMPL_RCD AND JR.EFFDT = JOB.EFFDT AND JR.EFFSEQ = JOB.EFFSEQ</pre>

Security Type SQL page (3 of 3)

The Application Engine uses the SQL fragments on this page to build the update and insert statements to update the transaction security join table.

You can use any SQLID but when you click the Generate SQL buttons, the system generates unique IDs based on the security set and/or type.

Warning! This page should only be used by users with a strong understanding of SQL joins and the table relationships.

Setting Up and Assigning Tree-Based Data Permission

To set up and use tree-based data permission, use the Tree Manager component (PSTREEMGR), Security Tree Audit Report component (RUNCTL_PER506), Security by Dept Tree component (SCRITY_DATA), and Refresh SJT_CLASS_ALL component (SCRITY_OPR_RC).

This section provides an overview of the data permission security by department security trees and discusses how to:

- Create and modify security trees.
- Audit security trees.
- Assign tree-based data permission to row security permission lists.
- Refresh SJT_CLASS_ALL with tree and row security permission list data.

Note. After you assign a row security permission list to a user, you must run the Refresh SJT_OPR_CLS process.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 103.](#)

Understanding Data Permission Security by Department Security Trees

Each security set has a tree-based security access type. Tree-based security access types use department security trees to set up a hierarchy of your departments and enable you to use this hierarchy to simplify data assignment.

You use PeopleSoft Tree Manager to build a hierarchy of department security for an organization. A security tree provides a graphic means to grant and restrict access to data. The security tree doesn't have to represent your organization's hierarchy exactly, although it is usually very close.

To grant a row security permission list access to a group of departments, you grant access to the department to which all of those departments report. You can restrict access to individual departments or to a group of departments if you need to. This is an example of a department security tree for the SHARE setID:

The screenshot displays the 'Tree Manager' interface. At the top, it shows the 'Set ID: SHARE', 'Last Audit: Valid Tree', 'Effective Date: 01/01/2000', 'Status: Active', and 'Tree Name: DEPT_SECURITY Departmental Security'. Below this are navigation links: 'Save As', 'Close', 'Tree Definition', 'Display Options', and 'Print Format'. A toolbar includes 'Collapse All', 'Expand All', 'Find', 'First Page', '60 of 96', and 'Last Page'. The main area shows a hierarchical tree structure starting with 'ADMIN - President'. Under 'ADMIN - President' is 'ADMINPRES - President & Ceo'. This node has several children: '11100 - Corporate Controller', '13300 - Finance & Administration', '22200 - Corporate IT', '40000 - Corporate Headquarters', '66600 - Research & Development', and '61100 - Engineering'. The '13300 - Finance & Administration' node is expanded, showing its sub-departments: '65000 - Shipping & Receiving', '42200 - Administration Staffing', '17100 - International Accounting', '41100 - Human Resources', '55500 - Sales & Marketing', '44400 - Business Services', '99999 - ALL_DEPTS KUV COMPANY', and '62200 - Quality Assurance Engineering'.

Portion of the SHARE department security tree

Using this security tree you could, for example, grant a row security permission list access to department 13000 and the system includes department 13000 and all the departments that report to it, giving the permission list access to everyone in all fourteen finance departments.

You can also restrict access to one of the branch entities. For example, if a row security permission list needs access to everyone in Finance except for Business Services, grant access to department 13000, but restrict access to department 15000, giving access to departments 13000, 20000, 22000, 25000, 27000, and 31000.

Note. You can only grant tree-based data permission to row security permission lists.

Before you work with data security and PeopleSoft Tree Manager, make sure that human resources data is defined in the PeopleSoft HRMS control tables.

Warning! Before you create or modify a security tree, we recommend that you review the *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager* for a detailed discussion of using PeopleSoft Tree Manager because this section does not provide a complete overview of the application. Security is an important component of your system, and it is crucial that you understand all aspects of PeopleSoft security and its tools before you implement it.

See [Chapter 5, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 81.](#)

See [Chapter 5, "Setting Up and Administering HRMS Security," Assigning Role-Based Data Permission Security to Permission Lists, page 90.](#)

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

Security Trees and Departments

For the purpose of building department security trees, PeopleSoft defines all entities in an organization—from companies to departments—as departments. The department data is created and stored in the Departments component (DEPARTMENT_TBL), which you can access from PeopleSoft Tree Manager or the Set Up HRMS menu. You assign security access based on these departments so define each entity in your organization in the Departments component so that you can add its department ID code to the security tree.

Trees are built with levels and nodes:

- Levels are the levels of the hierarchy.
- Nodes, representing organizational entities, are added at different levels to indicate their place in the hierarchy.

For example, the first level of your tree might be the company level. The second level might be the regional level. A node that is added at the first level is a company-level node and represents the company department. A node that is added at the second level is a regional-level node and represents a regional department, such as an office. The first node in your organization is the root node. This is the highest node in the hierarchy. All other nodes (departments) report up to the root node.

Access to data is based on the hierarchy that you create. If you grant access to a department, you also grant access to each department that reports to that department.

Note. You should include inactive departments on your security tree; otherwise, data for retired, terminated, or transferred people who used to be in inactive departments will be inaccessible.

See [Chapter 11, "Setting Up Organization Foundation Tables," Maintaining Departments, page 299.](#)

Security Trees and Effective Dates

All security trees are called DEPT_SECURITY. Security trees are uniquely identified by their setID and effective date.

You can create future-dated trees to reflect a change in your reporting structure and you may want to grant access using the newer tree (or, perhaps, to a historical tree).

When you assign data to a permission list on the Security by Dept Tree page select the date as of which you want the trees to be effective. When you add a row in the Define Security Profile grid on the Security by Dept Tree page and select the setID of the security tree, the system references the security tree that is effective as of the date you selected in the As of Date for the Trees field.

For example, it is now April, 2005 and you have created a future-dated security tree for the SHARE setID dated January 1, 2006. You wish to try out the data permission using the new tree. On the Security by Dept Tree page, enter January 1, 2006 (or a higher date; the date does not have to be the exact effective date of the tree) in the As of Date for the Trees field. Add a row in the Define Security Profile grid and select the SHARE setID. The system displays January 1, 2006 in the Effective Date field in the grid and uses the future-dated tree to enforce data permission for that permission list.

When the future-dated tree becomes effective, the system does *not* automatically update the security profiles of permission lists referencing the old tree. For example, on January 1, 2006, the system continues to use the previous SHARE tree to enforce data permission for all the permission lists that were referencing it.

To update the permission lists so that they reference the new tree, enter the Security by Dept Tree page, enter the date January 1, 2006, and click the Refresh Tree Effective Date button. The system will update the effective dates of all the trees referenced by that permission list to the dates the trees effective as of January 1, 2006.

Pages Used to Set Up and Assign Tree-Based Permission

Page Name	Definition Name	Navigation	Usage
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager, Tree Manager	Use to set up or modify department security trees. You must run the Refresh SJT_CLASS_ALL process whenever you set up or modify a tree.
Security Tree Audit Report	RUNCTL_PER506	Set Up HRMS, Security, Core Row Level Security, Security Tree Audit Report, Security Tree Audit Report	Use to create a list of discrepancies between the data you've entered in the Departments component and the departments you've added to the current security tree.
Security by Dept Tree	SCRTY_TABL_DEPT	Set Up HRMS, Security, Core Row Level Security, Security by Dept Tree, Security by Dept Tree	Grant tree-based department data access to row security permission lists.

Page Name	Definition Name	Navigation	Usage
Refresh SJT_CLASS_ALL	SCRTY_OPR_RC	Set Up HRMS, Security, Core Row Level Security, Refresh SJT_CLASS_ALL, Refresh SJT_CLASS_ALL	Run the Refresh SJT_CLASS_ALL process when you create or modify a security tree or when you create or modify a row security permission list to update SJT_CLASS_ALL with the user security data.

Creating and Modifying Security Trees

You can create a security tree automatically or manually.

Creating Security Trees Manually

The steps for creating a tree manually are described in the *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*. When you create a security tree, enter the following data on the Tree Definition and Properties page (PSTREEDEFN):

Field	Description
Tree Name	Enter <i>DEPT_SECURITY</i> .
Structure ID	Select <i>DEPARTMENT</i> . PeopleSoft delivers the system with this structure ID set up.
Description	Enter a description of the tree.
SetID	Select the setID of the departments that you will add to the tree.
Effective Date	Enter the date that the tree becomes effective. Add only the departments that are effective on or before this date.
Status	Select the status of the tree.
Category	Select the category of the tree.

<i>Field</i>	<i>Description</i>
Use of Levels	Select one of the following options: • <i>Strictly Enforced</i> Your levels consist of only one type of entity. For example, only regions report to the company level and only divisions report to the regional level. • <i>Loosely Enforced</i> The entities combine different types of entities. For example, both regions and divisions report to the company level. • <i>Not Used</i> Your security structure is flat, and you don't need to set up groups of units in levels.
All Detail Values in this Tree	Leave blank.
Allow Duplicate Detail Values	Leave blank.

Once you've created the basic tree structure, you begin to add nodes. In a security tree, each node represents a business entity in your organization. You define nodes on the Departments component, creating a department for each business entity in your organization.

You must have a node for every department in the setID. You can add nodes to your trees as you add departments to your organization.

To add a new, future-dated departments in order to maintain data security for people added to the new departments, create a future-dated security tree. This will enable you to add people to the new department before it becomes effective and still be able to control access to their data in the present.

Creating Security Trees Automatically

You can create a security tree using an existing organizational structure. Use the following Structured Query Report (SQR) procedure to import the existing hierarchy and build your security tree. You import your department data into a temporary Department Table, and the system uses that data to build the security tree.

To set up a hierarchy of departmental entities and build your data security tree automatically:

1. Import the entity data.

Import the entity data into the temporary table R_PER507 using the PeopleSoft Import utility, a Structured Query Report (SQR), or another batch facility. You load department data into this temporary table, so before you use this utility, you must establish the reporting hierarchy for all the departments in your organization. To do this, use the REPORTS_TO_DEPT field in the R_PER507 temporary table. R_PER507 is included with PeopleSoft HRMS; it looks like DEPT_TBL, but it includes the following additional columns:

<i>New Column</i>	<i>Description</i>
SETID_RPDEPT	Specifies the setID of the department that a particular department reports to. In addition to the other Department Table data, you must load data into this column.
REPORTS_TO_DEPT	Specifies department that a particular department reports to. In addition to the other Department Table data, you must load data into this column.
ORGCODEFLAG	Indicates whether the department is selected for processing as of a particular date. The system populates this column based on your department data and the REPORTS_TO_DEPT field values.
ORGCODE	Designates the position of the department in the hierarchy. The system populates this column based on your department data and the REPORTS_TO_DEPT field values.
TREE_LEVEL_NUM	Temporary work column.
PARENT_NODE_NUM	Temporary work column.
TREE_NODE_NUM	Temporary work column.
TREE_NODE_NUM_END	Temporary work column.

2. Set up the reporting hierarchy.

Run PER507 to set up the reporting hierarchy of your tree. This utility determines whether a department is active or inactive as of the date that you enter when you run the utility, and populates the ORGFLAG column in R_PER507 accordingly. The utility creates a structured organization code based on the REPORTS_TO_DEPT field values that you loaded and populates ORGCODE accordingly. This utility uses the ORGCODE values to set up the department hierarchy.

3. Build the department security tree.

Run PER508 to build your DEPT_SECURITY tree. The effective date of the tree is the latest effective date of the departments that were processed in step 2.

Note. To set up multiple trees to represent security or organizational structures at different points in time, perform step 2 for each tree, setting the As of Date each time, and perform this step again.

4. Transfer department data into the department component.

Run PER509 to transfer the information that you set up in R_PER507 into DEPT_TBL. You can't view or update the Department component until you run this utility.

5. Renumber and insert numbered gaps in the security tree.

Run PTUGAPTR.SQR to renumber the nodes in your tree and insert numbered gaps between the nodes.

Modifying Security Trees

You can modify an existing tree by changing either the nodes or the levels. When you modify a security tree, the tree node numbers usually change, so you need to refresh the numbers. You also need to run the Refresh SJT_CLASS_ALL process to update the data access profiles and security join tables.

See [Chapter 5, "Setting Up and Administering HRMS Security," Refreshing SJT_CLASS_ALL with Tree and Row Security Permission List Data, page 90.](#)

Renumbering Gaps in Security Trees

PeopleTools assigns each node a number and reserves a series of unused numbers, called gaps, which the system uses to make changes to sections of a security tree. When you move a node, the system renumbers the nodes that appear to the right of the node that you moved (the children of the node that you moved). When you save changes to a tree, the system saves only the parts of the tree that have changed.

To refresh the unused numbers in the gaps between nodes, run the PTUGAPTR.SQR utility. Refresh unused numbers when:

- You load your security tree structure.
- You modify your security tree.
- An error message tells you to gap your tree.

Auditing Security Trees

After you build your security tree, we recommend that you run an audit (PER506.SQR) to determine which department IDs are in the Departments component, but not in the security tree, and which IDs are in the security tree, but not in the Department component. You cannot implement tree-based security for new departments until you add them to your security tree. This audit ensures that you add each department in your system to the security tree.

Assigning Tree-Based Data Permission to Row Security Permission Lists

Access the Security by Dept Tree page (Set Up HRMS, Security, Core Row Level Security, Security by Dept Tree, Security by Dept Tree).

Security by Dept Tree

Row Security Permission List: HCDPALL Data Sec by Tree (all trees)

Refresh Tree Effdts by: 07/30/2009 Refresh Tree Effective Dates

Define Security Profile					Customize Find 1-64 of 64
*Set ID	*Dept ID		*Access Code	Effective Date of Tree	
AUS01	ALL DEPTS	All Departments	Read/Write	01/01/1980	
BEL01	10200	Headquarters - Belgium	Read/Write	01/01/1980	
BNCAN	B001	All Departments - 00001	Read/Write	01/01/1980	
BNUSA	B001	All Departments - 00001	Read/Write	01/01/1996	
CDN	00001	All Departments	Read/Write	01/01/1980	
CHE01	10200	Headquarters	Read/Write	01/01/2004	
CHN	ALL_DEPTS	Department Security China	Read/Write	01/01/2000	
DEU01	10200	Headquarters	Read/Write	01/01/2003	
EBGEN	E000	ST - President	Read/Write	01/01/1980	
ESP01	10000	Headquarters	Read/Write	01/01/1990	
ESP02	10000	Headquarters	Read/Write	01/01/1990	

Security by Dept Tree page

Refresh Tree Effdts by
(refresh tree effective
dates by)

The system will reference the trees that are effective as of this date when you select a tree setID in the Define Security Profile grid. Select a date in the future to reference a future-dated tree.

For example, to use the department security trees that are current as of today's date, enter today's date in this field.

**Refresh Tree Effective
Dates**

Select to refresh the trees listed in the Define Security Profile grid to trees that are effective as of the date in the As of Date for Trees field.

Note. To ensure that your row security permission lists use the current trees you must enter the appropriate as of date and click this button whenever you create a more recent version of a setID's security tree.

Define Security Profile

Set ID and Dept ID (department ID)	Enter the tree setID and the ID of the department that you are granting access to. The row security permission list has access to each department ID that reports up to this one on the security tree (unless you specify otherwise) so you don't have to select each department ID individually.
Access Code	Indicate what kind of access the row security permission list has to the data for this department ID. To restrict access to one or more departments that report up to a department ID that you've granted access to, insert a row and select the restricted department's ID and then select an Access Code of <i>No Access</i>. You need to restrict access explicitly only for department IDs that report up to the department ID to which you want to grant access. Otherwise, the row security permission list doesn't have access to a department unless it or the department to which it reports has been granted access on this page.
Effective Date of Tree	Displays this setID's tree effective date. Make sure that the effective date of the tree is accurate. The system will not update the effective date automatically if you make a newer version of a tree. To update trees, enter the date as of which the tree is effective in the Refresh Tree Effdts by field and click the Refresh Tree Effective Dates button.

Refreshing SGT_CLASS_ALL with Tree and Row Security Permission List Data

Whenever you add or modify a tree or add or modify a row security permission list on the Security by Dept Tree component you need to run the Refresh SGT_CLASS_ALL process to update SGT_CLASS_ALL with the new user security data.

You can access the new or modified tree on the Security by Dept Tree page before you run this process so if you are creating a tree and then using it on a new or existing permission list you only need to run the process once, as long as you refresh the appropriate rows.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refreshing SGT_CLASS_ALL Process, page 102.](#)

Assigning Role-Based Data Permission Security to Permission Lists

To assign data permission security to role-based permission lists, use the Security by Permission List component (SCRTY_CLASS).

This section discusses how to assign data permission security by field value to permission lists.

Page Used to Assign Role-Based Data Permission Security to Permission Lists

Page Name	Definition Name	Navigation	Usage
Security by Permission List	SCRTY_CLASS	Set Up HRMS, Security, Core Row Level Security, Security by Permission List, Security by Permission List	Grant data permission security by field values to role-based permission lists.

Granting Data Access to Permission Lists by Field Value

Access the Security by Permission List page (Set Up HRMS, Security, Core Row Level Security, Security by Permission List, Security by Permission List).

Security by Permission List

Permission List: HCDPALL Data Sec by Tree (all trees)

Security Set Find | View All First 1 of 2 Last

*Security Set: PPLPOI People without Jobs + -

Security Type Customize | Find | 1 of 1

	*Security Access Type	Key 1	Key 2	Security Key 3	
1	009 Person of Interest Type	00000			+ -

Security by Permission List page

Security Set

Select the security set whose data you want to secure with this permission list. To secure the data of more than one set, add more security set rows.

Security Type

Access Type

Select the security access type. The system only lists those types enabled for the security set.

You can use more than one access type to set data permission for a permission list.

Note. You cannot use tree-based security types on this page.

Note. The security access type 031 (Recruiting Team) works with the assignments on a job opening to grant access.

Key 1, Key 2, and Security Key 3

Select the transaction security value to which this permission list has access. You may have to select one, sometimes two, key prompts before you can select the transaction value.

For example, to give this permission list data permission access to people with jobs in location UK1, select the security set PPLJOB and the security access type Job Location. To select a location, you first must select a business unit, so in the Key 1 field, select the business unit GBR01 and in the Key 2, select the location UK1.

Add more rows to select more locations.

To use more than one access type, enter a row and select a different access type and select the field values for the type's security keys.

Note. Security types are not cumulative; they have an *or* relationship.

Refreshing Security Join Tables

To refresh security join tables, use the Nightly SJT Refresh Process component (SCRTY_SJTDLY_RC), Refresh Trans. SJT tables component (SCRTY_SJT_RC), the Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC), and the Refresh SJT_OPR_CLS component (SCRTY_OPRCLS_RC).

This section describes when to use the refresh processes and discusses how to:

- Run the nightly refresh process.
- Run the transaction security join table refresh process.
- Run the Refresh SJT_CLASS_ALL process.
- Run the Refresh SJT_OPR_CLS process.

Understanding When to Run the Refresh Processes

PeopleSoft HRMS core row level security has four refresh processes. Use the refresh processes to keep your security data up to date so that the system is enforcing data permission using the most current information.

Important! The refresh processes are designed to refresh each row included in the process definition in sequence, causing the system to take an exceptionally long time to run the process when there are a large number of rows. To improve performance, we recommend clearing the Refresh All Rows check boxes on the run control pages and creating more defined run controls to run concurrently. (For example, create a run control for each permission list and run them simultaneously, rather than refreshing all permission lists under a single run control). You can save the run controls and use them as often as necessary.

Nightly Refresh SJT

Run the Nightly Refresh SJT process nightly to refresh the transaction security join tables. The nightly refresh process:

- Updates the transaction security join tables with any changes to transaction security data that bypassed the SavePostChange PeopleCode.

The system automatically updates the transaction security join tables when you make and save a change on the transaction components, either by manual entry or a mass update that triggers the component interface. If you bypass the PeopleCode, you will need to capture the changes using a refresh process.

- Updates the security join table with future-dated security rows that have become current (when the current calendar date matches up with the effective date of the transaction record) because SavePostChange PeopleCode is not triggered when a future-dated row becomes current.
- If you are using future-dated security rows deletes the old security row and makes the future-flagged row the current row.

Run this process nightly for every security set you are using.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Nightly Refresh Process, page 99.](#)

SJT Refresh

Run the SJT Refresh process to refresh the transaction security join tables.

You will need to refresh the tables using this process when you:

- Enable or disable a security access type.

When you enable a security access type, you need to load the transaction security data for that type into the security join table.

You need to run it when you disable a security access type in order to clear the security join table of the transaction security data. You won't compromise your security if you don't run it but you will improve performance by removing the unnecessary rows.

- Update the transaction components using a process that bypasses the component interfaces.

The Nightly Refresh SJT process also captures this data but you may want to refresh the tables immediately rather than waiting for a scheduled run.

You can run this process for all security sets at once, individually, or by a smaller grouping of data.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Transaction Security Join Table Refresh Process, page 100.](#)

Refresh Row Security Operator

Run the Refresh SJT_CLASS_ALL process to refresh SJT_CLASS_ALL.

You will need to refresh SJT_CLASS_ALL using this process when you:

- Modify a security access type.

Modifications include selecting to use future-dated security rows or changing the job data security options.

- Create or modify a department security tree.
- Create or modify a row security permission list on the Security by Dept Tree component.

Modifications include adding or removing data permission and refreshing the effective dates of trees.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 102.](#)

Refresh SJT_OPR_CLS

Run the Refresh SJT_OPR_CLS process to refresh SJT_OPR_CLS.

You will need to refresh SJT_OPR_CLS whenever you create or change the relationship between a user profile and a permission list with data permission. Run the process when you:

- Clone a user profile that has data permission.
- Add a row security permission list that has data permission to, or delete one from, a user on the User Profile - General page.
- Add a role with permission lists with data permission to, or delete one from, a user.
- Add a permission list with data permission to, or delete one from, a user-assigned role

Note. SavePostChange PeopleCode on the Security by Dept Tree component and the Security by Permission List component updates SJT_OPR_CLS when you add a permission list to either component for the first time. If you add a permission list to the user first, either in the Row Security field or by way of a role, and then add it to the Security by Dept Tree page or Security by Permission List page, you do *not* need to run the process.

You can enable the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS.

PeopleSoft does not deliver the system with these messages enabled in order to prevent unnecessary publishing. If you would like to use them, follow these steps:

1. Uncomment the following PeopleCode found in the USERMAINT.GBL SavePostChange PeopleCode.

```
/*
If %Mode="A" Then
  %MSG.CopyRowset(&USERPROFILECHANGE);
  &MSG.Publish();
Else
  &MSG.CopyRowsetDelta(&USERPROFILECHANGE);
  &MSG.Publish();
End-If,*/
```

2. Use PeopleSoft Application Designer to activate the USER_PROFILE and ROLE_MAINT messages by:
 - a. Opening each message.
 - b. Click on the Properties icon.
 - c. Select the User tab.
 - d. Select the Active check box.
3. Use PeopleSoft Application Designer to activate the handler/application class for the USER_PROFILE and ROLE_MAINT messages:
 - a. Open each message.
 - b. Under Message Subscriptions, select HCM_Refresh_SJT_OPR_CLS (for USER_PROFILE) or HCM_ROLE_REFRESH_SJT_OPR_CLS (for ROLE_MAINT), right click, and select Message Subscription Properties.
 - c. Select the Active check box.
4. Confirm that the queues are running:
 - a. Select PeopleTools, Integration Broker, Monitor Integrations, Monitor Message.
 - b. On the Monitor Message - Channel Status page (AMM_CHNL_STATUS), scroll down until you locate both the USER_PROFILE and ROLE_MAINT channels.
 - c. Confirm that both channels have a status of *Running*.
5. Make the USER_PROFILE and ROLE_MAINT messages active on the HRMS node by:
 - Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
 - On the Node Definitions - Transaction page (IB_NODETRXLIST), change the status of each message to *Active*.

See [Chapter 38, "Working with Integration Points in Enterprise HRMS," Working with HRMS Local Integrations, page 942.](#)

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 103.](#)

Refresh Processes by Action

This table indicates which refresh processes you should run when implementing HRMS security:

Action	Refresh SJT_CLASS_ALL	SJT_Refresh
Make changes to the implementation settings on the Security Installation Settings page.	Run	Run
Enable a security access type.		Run
Disable a security access type.	Run	Run
Modify an enabled security access type (for example, by selecting or deselecting the Include Future Dates check box).	Run	Run

This table indicates which refresh processes you should run when using security trees and creating and modifying row security permission lists:

Action	Refresh SJT_CLASS_ALL
Create a department security tree.	
Create a new effective-dated version of an existing tree. Note. You do not need to refresh SJT_CLASS_ALL yet because you'll have to update the data permission lists to reference the new tree. You'll run the SJT_CLASS_PROCESS then.	
Modify a department security tree <i>without</i> changing the effective date.	Run
Add a new permission list to the Security by Dept Tree page and add to it data permission.	Run
Modify the data permission of a permission list on the Security by Dept Tree page.	Run
Refresh the effective date of the trees on the Security by Dept Tree page because you created a new effective-dated version of an existing tree.	Run

This table indicates which refresh processes you should run when creating and modifying row security permission lists:

Action	Refresh SJT_CLASS_ALL
Add a new permission list to the Security by Permission List page and add to it data permission. Note. The system uses SavePostChange PeopleCode to update SJT_CLASS_ALL automatically when you save the component.	

Action	Refresh SJT_CLASS_ALL
Modify the data permission of a permission list on the Security by Permission List page. Note. The system uses SavePostChange PeopleCode to update SJT_CLASS_ALL automatically when you save the component.	

This table indicates which refresh processes you should run when you add, delete, or modify a user's data permission:

Note. This table assumes that you have not enabled the USER_PROFILE message and the local subscription HCM_Refresh_SJT_OPR_CLS and the ROLE_MAINT message and the local subscription HCM_Role_Refresh_SJT_OPR_CLS to automatically update SJT_OPR_CLS. PeopleSoft does not deliver the system with these messages enabled.

If these messages are enabled, the system updates SJT_OPR_CLS and you do not need to run the refresh process following any of these actions.

Action	Refresh SJT_OPR_CLS
Add a row security permission list to a user profile on the User Profile – General page.	Run
Delete a row security permission list from a user profile on the User Profile – General page.	Run
Change a row security permission list on a user profile on the User Profile – General page.	Run
Create a new user profile by copying an existing profile that has permission lists with data permission (whether by the Copy User Profiles page, the Create Users process, or the Create Row Security - Dept Mgr process).	Run
Add a role-based permission list (one that has data permission from the Security Permission List page) to a role that is already assigned to a user.	Run
Delete a role-based permission list (one that has data permission from the Security Permission List page) from a role that is already assigned to a user.	Run
Add a role that has one or more role-based permission lists (permission lists that have data permission from the Security Permission List page) to a user profile.	Run
Delete a role that has one or more role-based permission lists (permission lists that have data permission from the Security Permission List page) from a user profile.	Run
Add a permission list that is already assigned to a user (by way of a role) to the Security by Permission List page and give it data permission.	

Action	Refresh SJT_OPR_CLS
Add a permission list that is already assigned to a user on the User Profile – General page to the Security by Dept Tree page and give it data permission.	

This table indicates which refresh processes you should run when you add, delete, or modify the following transaction security data:

- Job data record for a person.
- Person of interest record for a person.
- Department.
- Job opening.

Action	SJT Refresh process
Add, delete, or modify an existing transaction record.	
Create a future-dated transaction record.	
Using a mass update process that triggers the component interfaces, create, delete, or modify multiple transaction records	
Using a mass update process that does not trigger the component interfaces (or otherwise bypass the component interface on the transaction record), create, delete, or modify multiple transaction records.	Run

Pages Used to Refresh Security

Page Name	Definition Name	Navigation	Usage
Nightly SJT Refresh Process	SCRTY_SJTDLY_RC	Set Up HRMS, Security, Core Row Level Security, Nightly SJT Refresh Process, Nightly SJT Refresh Process	Refresh the transaction security join tables to capture data changes that were not automatically loaded into the table. Run shortly after midnight to capture effective-dated changes.
Refresh Trans. SJT tables	SCRTY_SJT_RC	Set Up HRMS, Security, Core Row Level Security, Refresh Trans. SJT tables, Refresh Trans. SJT tables	Refresh some or all of the data in the transaction-based security join tables to capture data changes that were not automatically loaded into the table.

Page Name	Definition Name	Navigation	Usage
Refresh SJT_CLASS_ALL	SCRTY_OPR_RC	Set Up HRMS, Security, Core Row Level Security, Refresh SJT_CLASS_ALL, Refresh SJT_CLASS_ALL	Refresh some or all of the data in the SJT_CLASS_ALL table to capture changes to permission lists that were not automatically loaded into the table.
Refresh SJT_OPR_CLS (security operator class)	SCRTY_OPRCLS_RC	Set Up HRMS, Security, Core Row Level Security, Refresh SJT_OPR_CLS, Refresh SJT_OPR_CLS	Refresh some or all of the data in the SJT_OPR_CLS to capture the current relationship between user profiles and permission lists.

Running the Nightly Refresh Process

Access the Nightly SJT Refresh Process page (Set Up HRMS, Security, Core Row Level Security, Nightly SJT Refresh Process, Nightly SJT Refresh Process).

Nightly SJT Refresh Process

Run Control ID: Nightly_Refresh [Report Manager](#) [Process Monitor](#) [Run](#)

Refresh the SJT Transaction Tables to capture effective dated rows that are now current. This process can also update any transaction that was entered in the prior day. This process should be set up to run every day shortly after midnight.

Row Level Security Refresh

Transaction Sec Join Table:  ☒ Include yesterday's changes?

As Of Date: 

Nightly SJT Refresh Process page

Set up this process to run every night shortly after midnight using a recurring schedule and leaving the As Of Date field empty. By running the process shortly after midnight, you capture the formerly future-dated rows that have just become effective.

Transaction Sec Join Table Select the transaction security join table to update.

Include yesterday's changes?

Select to include the previous day's changes. The program searches the system for any changes to the transaction records on the previous day and updates the transaction security join tables with those changes. This ensures that any changes that were made to the data outside of components or component interfaces are captured.

If you do not select this check box, the process will only update the transaction security join tables with the changes made on the as of date.

Note. It is recommended that you select this option every time you run this process to guarantee that you are updating the transaction security join tables with the latest information. Only deselect the check box if you are experiencing performance issues and you are certain that the records are not being updated outside of the regular user interface or component interfaces.

As Of Date

Leave the as of date blank when you schedule this run control ID to run on a recurring basis. The system will use the current, system date each time it runs.

Running the Transaction Security Join Table Refresh Process

Access the Refresh Trans. SJT tables page (Set Up HRMS, Security, Core Row Level Security, Refresh Trans. SJT tables, Refresh Trans. SJT tables).

Refresh Trans. SJT tables

Run Control ID: Refresh [Report Manager](#) [Process Monitor](#) [Run](#)

Refresh the Transaction Security Join Tables.
This needs to be done when mass changes have been made to the data the Transaction table is based on - and the change was not done through a CI. It can be run at anytime for all of the Tables or for one.

Row Level Security Refresh

*Refresh All Sets?:

Security Set: SJT Table: SJT_PERSON

☐ Refresh All Rows?

Rows to Update:

Rows to Update

[Populate Security Types](#) [Select All](#) [Deselect All](#)

Data						Customize Find 1-3 of 3	
	Select	Security Access Type	Description				
1	☒	001	Job Department Tree				
2	☒	003	Job Business Unit				
3	☒	015	Person Organization				

Refresh Trans. SJT tables page

Refresh All Sets?

Select *All Security Sets* to refresh all security sets.
Select *One Security Set* to refresh one security set.

Security Set and SJT Table

If you are refreshing one security set, select the set. The system displays the transaction security join table associated with the security set.

Refresh All Rows?

Select to refresh every row in the security join table.
Deselect to refresh select rows in the security join table. The system displays the Rows to Update grid.

Rows to Update

Select the rows to update. The options available are the ones you selected for the security set on the Security Sets component.

Rows to Update

The fields and buttons in the Rows to Update grid will vary depending on the rows you select to update in the Rows to Update field. Enter the rows of data you want to update.

For example, if you select *Security Type* in the Rows to Update field, select the security types whose transaction data you want to refresh.

Running the Refreshing SJT_CLASS_ALL Process

Access the Refresh SJT_CLASS_ALL page (Set Up HRMS, Security, Core Row Level Security, Refresh SJT_CLASS_ALL, Refresh SJT_CLASS_ALL).

Refresh SJT_CLASS_ALL

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Refresh the SJT_CLASS_ALL Security Join Table.
This is done when a Security Type is modified or added, when a Security Tree is modified or added, or when a ROWSECCLASS is modified or added. The process can be run for all data; for all Trees; or for a group of trees, types, or permission lists.
All Tree Permission Lists are updated based on the refresh date Except when run for specific tree.

Row Level Security Refresh

☐ Refresh All Rows?
Refresh Set: Permission List
Refresh Tree Effdts by: H

Set of Security to Refresh

Permission List	Permission List Description
1 HCCPC01200	Administer eCompensation

Refresh SJT_CLASS_ALL page

Row Level Security Refresh

Refresh All Rows?

Select to refresh every row in SJT_CLASS_ALL.

Deselect to refresh selected rows. The system displays the Refresh Set field.

Refresh Set

Select the set of rows to refresh. The system displays the Set of Security to Refresh grid.

You can select to refresh:

- *All Trees.*
- *Permission List*
- *Security Type*
- *Specific Tree*

Refresh Tree Effdts by
(refresh tree effective
dates by)

Select the date as of which you are refreshing the table. The process will refresh the table with the security data that is effective as of this date.

**Set of Security to
Refresh**

Select the values to refresh.

For example, if you've modified a row security permission list, rather than refreshing the entire table, select *Permission List* in the Refresh Set field and select the permission list you modified here.

If you've modified a specific tree, select *Specific Tree* in the Refresh Set field and select the setID's to refresh for that tree.

Running the Refresh SJT_OPR_CLS Process

Access the Refresh SJT_OPR_CLS page (Set Up HRMS, Security, Core Row Level Security, Refresh SJT_OPR_CLS, Refresh SJT_OPR_CLS).

Refresh SJT_OPR_CLS

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Refresh the SJT_OPR_CLS Security Join Table.
This is done when an Operator or a Security Class is added to or deleted from a Security Role. The process can be run for all data, for a set of Operators or a set of CLASSIDs.

Row Level Security Refresh

☐ Refresh All Rows?

Set of Security to Refresh:

Group box

Data		Customize	Find	1 of 1
Class Id	Description			
HCDPALL	Data Sec by Tree (all trees)			+ -

Refresh SJT_OPR_CLS page

The Refresh SJT_OPR_CLS process refreshes SJT_OPR_CLS as of the system date.

Refresh All Rows?

Select to refresh every row in SJT_OPR_CLS.

Deselect to refresh selected rows. The system displays the Set of Security to Refresh field.

Set of Security to Refresh

Select the set of rows to refresh.

You can select to refresh:

- *Classid*

Select to refresh the table with the selected row security or role-based permission lists IDs of users to whom they are attached.

- *Orpid*

Select to refresh the table with the selected user IDs and the permission lists assigned to them.

Querying Data Permission Security

To query data permission security, use the Security Data Inquiry component.

This section discusses how to:

- Find search views.
- Search security data.
- Search user security data.
- Search transaction security data in SJT_PERSON and SJT_PERSON_USF.
- Search transaction security data in SJT_DEPT.
- Search transaction security data in HRS_SJT_JO.

Understanding Data Permission Queries

The Security Data Inquiry component enables you to quickly and easily query aspects of your data permission setup in the event that you have questions or concerns about the implications of the access you've set up. The component consists of seven pages, each querying a different aspect of HRMS data permission:

Page	Description
Find Search View	Use this page to review details about the security search view used by a component. There are a number of different search views and even the same component can use a different view, depending on which menu it is on. The security view text tells you which security set the data in the component falls into and if there is any special selection criteria. To use query search views you need to know the: • Component name. • Market. • Menu name. • Access mode the user was attempting: (either add or update). • If they were trying to add a record, you want to query the add search view (the system displays this in the Add Search field). • If they were trying to update or review a record, you want to query the search view displayed in the Search Record Name or Override Search Record field.
Display Security Data	Use this page to review security data for the selected security set and security access type. You can further refine the query by selecting a user ID, permission list, or security key value, or a combination of the three. Review both the permission list access and the transaction data secured by the parameters. For example, you can review the data permission assigned to the permission list MyJobs for security set PPLJOB and security access type 001 (department 11000). Or you can review the transaction data available to permission list MyJobs for security set PPLJOB and security access type 002 (112 people with jobs). To compile a list of access for more than one access type, download the data in the grids to Microsoft Excel
User Security Data	Review a user's data permission profile, including his or her roles, role-based permission lists, and row security permission lists, and the data permission associated with them. The query only includes the roles and role-based permission lists that contain data permission security.

Page	Description
- Find in SJT_PERSON - Find in SJT_DEPT - Find in SJT_PERSON_USF - Find in HRS_SJT_JO	Use this page to review the access to transaction data. You can review: - The data securing transaction records. - Which permission list has data permission access to selected records. - Which users are assigned the selected permission lists.

Pages Used to Query Data Permission Security

Page Name	Definition Name	Navigation	Usage
Find Search View	SCRTY_CLASS_DISP	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find Search View	Use this page to query the actual view SQL text used in a specific component. Enter the name of the view you want to query in the View Name field. You can use the SQL Object ID to view the definitions of the SQL objects used in the view.
Display Security Data	SCRTY_TRANS_DISP	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Display Security Data	Use this page to display the security data for a selected security set and access type. You can view the user security data using the type and the transaction data secured by the type.
User Security Data	SCRTY_OPR_DISP	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, User Security Data	Use this page to query and review a user's security data, including assigned roles and permission lists.
Find in SJT_PERSON	SCRTY_SJT_PERSON	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_PERSON	Use this page to review the transaction data used to secure a person's data and the permission lists and users who have access the person.
Find in SJT_DEPT	SCRTY_SJT_DEPT	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_DEPT	Use this page to review the transaction data used to secure a department's data and the permission lists and users who have access the department.

Page Name	Definition Name	Navigation	Usage
Find in SJT_PERSON_USF	SCRTY_SJT_PER_USF	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_PERSON_USF	(USF) Use this page to review the transaction data used to secure a person's data and the permission lists and users who have access the person.
Find in HRS_SJT_JO	SCRTY_SJT_RSOPN	Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in HRS_SJT_JO	Use this page to review the transaction data used to secure a job opening and the permission lists and users who have access the job opening.

Finding Search Views

Access the Find Search View page (Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find Search View).

Find Search View

Display Security Data

User Security Data

Find in SJT_PERSON

Find in SJT_DEPT

Use this page to query the actual view sql text used in a specific component. Enter the name of the view you want to query in the View Name field.

You can use the SQL Object ID to see what the sql objects used in the view contain.

Find the Search Views to Check

Component Name:

PERSONAL_DATA

Market:

GBL

Search Record Name:

PERS_SRCH_ALL

Add Search:

PERS_SRCH_ALL

Menu Name:

ADMINISTER_WORKFORCE_(GBL)

Override Search Record:

PERALL_SEC_SRCH

Display View and SQL Text

View Name:

PERALL_SEC_SRCH

View Text:

SELECT DISTINCT %Sql(SCRTY_SEL_PKEY, OPR,SEC) , %Sql(SCRTY_SEL_CORSBR,NM,SEC) , %Sql(SCRTY_SEL_FLDSBR,SEC) FROM %Sql(SCRTY_PER_NM_FROM) WHERE %Sql(SCRTY_NO_APPT1) AND %Sql(SCRTY_NAME) AND (%Sql(SCRTY_WHERE, 'PPLJOB') OR %Sql(SCRTY_WHERE, 'PPLPOI'))

SQL Object ID:

SCRTY_PER_FROM

SqlText:

PS_SJT_PERSON SEC, PSOPRDEFN OPR

Find Search View page

- To review the view and SQL text used in a security search view indicate which search view to search by entering the:
- Component name
 - Market
 - Menu name
- Search Record Name

Displays the component's default search record when you access the component in update or display mode.

Note.

You can assign an override search record to a component at the menu level. If the component uses an override search record, the search record displayed in the Override Search Record will be different from this one and you should search it instead.
- Add Search

Displays the component's search record when you access the component in add mode.
- Override Search Record

Displays the component's override search record when you access the component in update or display mode.

View Name and View Text	To review the text from a search record view, enter it into the View Name field. The system displays the view text when you tab out of the View Name field.
SQL Object ID and SqlText	To review the SQL text within an SQL Object used by the view, enter the SQL object ID into the SQL Object ID field. The system displays the SQL text when you tab out of the SQL Object ID field.

Note. SQL objects are used to store common SQL.

For example, the security search view for the Personal Data component on the Administer Workforce menu, when accessed in Update mode, is PERALL_SEC_SRCH. This search view uses the security sets PPLJOB and PPLPOI and the transaction security join table SJT_PERSON. The view text has a special selection criteria to not return rows where the APPT_TYPE (appointment type) is equal to 1.

You can use this information to review the security data in greater detail. Perhaps to see what data is secured in security set PPLPOI or if the record a user is trying to access in this component has an appointment type value equaling 1 and that is why the record is unavailable.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Searching Security Data

Access the Display Security Data page (Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Display Security Data).

Find Search View | **Display Security Data** | User Security Data | Find in SJT_PERSON | Find in SJT_DEPT | Find in SJT_PERSON_USF |

Use this page to display the Security Definitional data and the transactional data accessed through those definitions. You must enter a Security Set and Type. The other selection criteria are optional and can be combined as needed.

Enter Search Values

*Security Set: PPLJOB Transaction Sec Join Table:

*Security Access Type: 001

User ID: ID/Name:

Row Security:

Permission List:

Security Key 1: SETID_DEPT

Security Key 2: DEPTID

Security Key 3:

Display Security Data (1 of 3)

▼ Show Security Definitions

Show Security Definitions Clear the Grid

Show SQL

Security Definition Data - SJT_CLASS_ALL Customize Find 1-8 of 8

Select	Permission List	Security Key 1	Security Key 2	Security Key 3	Tree		
1 ☐	HCDPALL	SHARE	25000		☒	+	-
2 ☐	HCDPCAN	SHARE	25000		☒	+	-
3 ☐	HCDPFED	SHARE	25000		☒	+	-
4 ☐	HCDPMEX	SHARE	25000		☒	+	-
5 ☒	HCDPMYS	SHARE	25000		☒	+	-
6 ☒	HCDPPB	SHARE	25000		☒	+	-
7 ☒	HCDPTLTX	SHARE	25000		☒	+	-
8 ☐	HCDPUSA	SHARE	25000		☒	+	-

Display Security Data (2 of 3)

▼ View the Transaction Data

Show Transaction Data Clear the Grid

Security Data - SJT_PERSON Customize Find 1-33 of 33

Key 1	Key 2	Key 3	Empl ID	Empl Record	Name	Home/Host	Intl Type	Future?	Addl Appt
1 SHARE	25000		K0G017	0	Edward Jackson	Home		☐	☐
2 SHARE	25000		K0G018	0	Josephine Bonds	Home		☐	☐
3 SHARE	25000		K0G019	0	Janet Braxton	Home		☐	☐
4 SHARE	25000		K0G020	0	Jennifer Miller	Home		☐	☐
5 SHARE	25000		K0W005	0	Laura Jones	Home		☐	☐
6 SHARE	25000		K0W045	0	John April	Home		☐	☐
7 SHARE	25000		K0W307	0	Paulina Blonde	Home		☐	☐
8 SHARE	25000		K0W335	0	Peg Roberts	Home		☐	☐
9 SHARE	25000		K0W345	0	Al Verdi	Home		☐	☐
10 SHARE	25000		K0W347	0	Justin Palin	Home		☐	☐
11 SHARE	25000		K0W348	0	Bruce McNeil	Home		☐	☐
12 SHARE	25000		K0G017	0	Edward Jackson	Home		☐	☐
13 SHARE	25000		K0G018	0	Josephine Bonds	Home		☐	☐
14 SHARE	25000		K0G019	0	Janet Braxton	Home		☐	☐
15 SHARE	25000		K0G020	0	Jennifer Miller	Home		☐	☐

Display Security Data (3 of 3)

Click the Clear All Entries button to clear the search value fields.

Enter Search Values

**Security Set,
Transaction Sec Join
Table, and Security
Access Type**

Select the security set and security access type whose security data you want to review. The system displays the transaction security join table used by the security set.

Note. If you want to review data permission security data for more than one security access type or for more than one of the additional parameters below, down the results in the Show Security Definitions and View the Transaction Data grids to Microsoft Excel and add to them as you perform your search.

To further refine the search within the selected security set or security access type, enter one or more values in these fields:

User ID and ID/Name	To review a user's data permission security data, select the user ID. The system displays the ID and name of the person assigned to the selected profile.
Row Security	To review the data permission security data of a row security permission list, select the permission list. When you select a tree-based security access type and enter a user ID, the system enters the row security permission list associated with the user ID. This field is only available when you select a tree-based security access type.
Security Key 1, Security Key 2, and Security Key 3	To review the data permission security data for a selected security key, select the values (for example, to review the security data for department 10000, enter the department setID SHARE in Security Key 1 and the department id 10000 in Security Key 2).

Expand the Show SQL group boxes in the Show Security Definitions group box and the Viewing Transaction Data group box to review the SQL used to query SJT_CLASS_ALL table and transaction security join table for this query.

See [Chapter 5, "Setting Up and Administering HRMS Security," Understanding Data Permission Security for HRMS, page 45.](#)

Show Security Definitions

Click the Show Security Definitions button to display the user security data that meets the search criteria.

The grid displays the permission list and the security key values that the permission list can access.

Tree The system selects this check box for row security (tree-based) permission lists.

View the Transaction Data

Click the Show Transaction Data button to display the transaction data stored in the transaction security join table of the selected security set. The rows in the grid vary depending on which security set you are querying.

Security Key 1 or Key 1, Security Key 2 or Key 2, and Security Key 3 or Key 3 Displays the transaction security data (and the necessary key values) used to secure this row of data.

SetID, Department, Effective Date, and Description For rows of department transaction data, displays the set ID and the department whose data is secured.

Job Opening ID	For rows of recruiting solutions job openings, displays the ID of the job opening whose data is being secured.
Empl ID, Empl Record, and Name	For rows of person transaction data, displays the ID, employee record number (if applicable), and the name of the person whose data is secured. A person with more than one unique empl ID and employee record number combination will have more than one row of data.
Home/Host	This field is for global assignments and indicates if the transaction row is from the home or the host assignment job data record. Only job data records for the global assignment will display <i>Host</i>. See Chapter 5, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 72.
Intl Type (international type)	If you are using special security options for global assignment job data records, this field indicates if this row was created by the system to enable special job security. See Chapter 5, "Setting Up and Administering HRMS Security," Understanding Special Job Security Options, page 71.
Future?	This field indicates if the row comes from a future-dated transaction row. See Chapter 5, "Setting Up and Administering HRMS Security," Understanding Future-Dated Security, page 70.
Addl Appt (additional appointment)	(JPN) Indicates if this is an additional appointment transaction row. See Chapter 5, "Setting Up and Administering HRMS Security," Installing HRMS Security, page 72.
WIP Status, Retirement, NOA Code, and Stat Type	(USF) displays additional information about the job data row. These values are not used to secure data.

Searching User Security Data

Access the User Security Data page (Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, User Security Data).

Find Search View Display Security Data **User Security Data** Find in SJT_PERSON Find in SJT_DEPT Find in SJT_PERSON_USF

User ID:

ID/Name: KU0007 [Betty Locherty](#)

Row Security: HCDPALL Data Sec by Tree (all trees)

User's Data Security Roles and Classes - SCRTY_OPR_ROLE				
Role Name	Description	Permission List	Permission List Description	
1 Security: People without Jobs	Access to People without Jobs	HCDPALLPOI	Access to People w/out Jobs	

User's Data Security Definitions by Role Class - SJT_CLASS_ALL						
Permission List	Security Access Type	Short Description	Security Key 1	Security Key 2	Security Key 3	
1 HCDPALLPOI	009		00000			
2 HCDPALLPOI	009		00007			
3 HCDPALLPOI	009		00008			
4 HCDPALLPOI	009		00009			
5 HCDPALLPOI	009		00010			

User Security Data page (1 of 2)

User's Data Security Definitions by ROWSECCLASS - SJT_CLASS_ALL						
Permission List	Security Access Type	Short Description	Security Key 1	Security Key 3	Security Key 2	
1 HCDPALL	001	Job Dept	AUS01		10000	
2 HCDPALL	001	Job Dept	AUS01		11000	
3 HCDPALL	001	Job Dept	AUS01		12000	
4 HCDPALL	001	Job Dept	AUS01		13000	
5 HCDPALL	001	Job Dept	AUS01		14000	
6 HCDPALL	001	Job Dept	AUS01		15000	
7 HCDPALL	001	Job Dept	AUS01		21500	
8 HCDPALL	001	Job Dept	AUS01		25000	
9 HCDPALL	001	Job Dept	AUS01		27000	

User Security Data page (2 of 2)

User ID Select the user ID of the person whose data permission access you want to query.
 The system displays the user's name and his or her row security permission list.

Click the Show Security Definitions button to populate the grids on the page.

User's Data Security Roles and Classes – SCRTY_OPR_ROLE

Displays the roles assigned to the user and the permission lists with data permission assigned to those roles.

Note. The SCRTY_OPR_ROLE table only stores the roles that have permission lists with data permission. The grid does not list roles that do not have data permission .

User's Data Security Definitions by Role Class – SJT_CLASS_ALL

Displays the data permission of the role-based permission lists associated with this user's roles.

User's Data Security Definitions by ROWSECCLASS – SJT_CLASS_ALL

Displays the permissions of the row security permission list assigned to this user.

See Also

Chapter 5, "Setting Up and Administering HRMS Security," Security Data, page 49

Searching Transaction Security Data in SJT_PERSON and SJT_PERSON_USF

Access the Find in SJT_PERSON page (Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_PERSON) or Find in SJT_PERSON_USF page (Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_PERSON_USF).

Find Search View Display Security Data User Security Data Find in SJT_PERSON Find in SJT_DEPT Find in SJT_PERSON_USF

Enter Search Values

Empl ID: Z89002 [Joanne Devey](#) Clear All Entries

Empl Record:

POI Type:

Show Security Definitions

Security Data - SJT_PERSON Customize | Find | 1 of 7 First Last

Security Key Data Special Job Flags

	Select	Empl ID	Empl Record	POI Type	POI Type	Security Type	Description	Security Key 1	Security Key 2	Security Key 3
1	☐	Z89002	0			001	Job Department Tree	ZEBEN	ZD00000002	
2	☐	Z89002	0			004	Job Company	ZEB		
3	☒	Z89002	0		External Instructor	006	POI Business Unit	00008	ZBU00	
4	☐	Z89002	0		External Instructor	006	POI Business Unit	00008	ZBU00	
5	☐	Z89002	0		External Instructor	008	POI Institution	00008	PSUNV	
6	☐	Z89002	0		External Instructor	008	POI Institution	00008	PSUNV	
7	☐	Z89002	0		External Instructor	009	Person of Interest	00008		

Find in SJT_PERSON page (1 of 2)

Permission List Data

Show Permissions Lists

Security Definition - SJT_CLASS_ALL Customize | Find | 1 of 1 First Last

	Select	Security Set	Security Type	Permission List	Permission List Description	Security Key 1	Security Key 2	Security Key 3	Tree
1	☐								☐

Operator Data

Show Users

Security Definition - SJT_OPR_CLS Customize | Find | 1 of 1 First Last

	Permission List	User ID	Empl ID	Name	RowSecClass Flag	Role Name
1					Role Class	

Find in SJT_PERSON page (2 of 2)

Note. The Find in SJT_PERSON_USF page does not have the option to search for POIs.

Select the EmplID of the person whose transaction security data you want to review. To limit the search to a single job data record, enter the employee record number. To limit the search to a specific person of interest type, select the type.

Click the Show Security Definitions button to populate the Security Data - SJT_PERSON grid with the transaction security data securing this person's record or records.

Security Data – SJT_PERSON

Click the Show Security Definitions button to populate the Security Data - SJT_PERSON grid.

The system lists the rows in SJT_PERSON that match the search criteria you entered. Review the security keys on the Security Key Data tab. Access the Special Job Flags tab to review special security job option data, such as if a row is a future-dated row or if it was created to enable home/host access or additional assignment access.

To review which permission lists have data permission access to one or more of these rows, select the rows and click the Show Permission Lists button.

Permission List Data

Click the Show Permission Lists button to populate this grid

For each security set and security access type, the system lists the permission lists that can access the transaction rows you selected.

To review which users are assigned to one or more of these permission lists, select the rows and click the Show Users button.

Operator Data

Click the Show Users button to populate the grid.

The system displays each user assigned to the permission list or lists that you selected and indicates if the permission list is assigned to the user as a row security permission list or role-based (role-class) and, if the permission list is role-based, which role it is assigned to on the user's profile.

Searching Transaction Security Data in SJT_DEPT

Access the Find in SJT_DEPT page (Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in SJT_DEPT).

Find Search View Display Security Data User Security Data Find in SJT_PERSON Find in SJT_DEPT

Enter Search Values

Set ID: Clear All Entries

Department: Information Systems

Show Security Definitions

Security Data - SJT_DEPT Customize Find 1 of 1

Select	Set ID	Department	Description	Security Access Type	Description	Security Key 1	Security Key 2	Security Key 3	Include Future Dates	Effective Date
☒	SHARE	11000	Information Systems	021	Departments by Tree	SHARE	11000		☐	02/03/2009

Permission List Data

Show Permissions Lists

Security Definition - SJT_CLASS_ALL Customize Find 1-8 of 8

Select	Security Set	Security Access Type	Permission List	Permission List Description	Security Key 1	Security Key 2	Security Key 3	Tree
☐	PPLJOB	001	HCDPALL	Data Sec by Tree (all trees)	SHARE	11000		☒
☐	PPLJOB	001	HCDPCAN	Data Sec by Tree - Canada	SHARE	11000		☒
☐	PPLJOB	001	HCDPFED	Data Sec by Tree - Federal	SHARE	11000		☒
☐	PPLJOB	001	HCDPMEX	Data Sec by Tree - Mexico	SHARE	11000		☒
☒	PPLJOB	001	HCDPMYS	Data Sec by Tree - Malaysia	SHARE	11000		☒
☐	PPLJOB	001	HCDPPB	HCDPPB: Data Sec by Tree -	SHARE	11000		☒

Find in SJT_DEPT page (1 of 2)

Operator Data

Show Users

User's Data Security Roles and Classes - SCRTY_OPR_ROLE Customize Find 1-3 of 3

Permission List	User ID	Empl ID	Name	RowSecClass Flag	Role Name
1 HCDPMYS	HCRMYS	KM0020	Philip Lim	RowSecclass	
2 HCDPMYS	HCRMYS_KM0001	KM0001	Lee Choo	RowSecclass	
3 HCDPMYS	HCRMYS_KM0008	KM0008	Lee Chin	RowSecclass	

Find in SJT_DEPT page (2 of 2)

Select the setID and department ID of the department whose transaction security data you want to review.

Click the Show Security Definitions button to populate the Security Data - SJT_DEPT grid with the transaction security data securing this department's record or records.

Searching Transaction Security Data in HRS_SJT_JO

Access the Find in HRS_SJT_JO page (Set Up HRMS, Security, Core Row Level Security, Security Data Inquiry, Find in HRS_SJT_JO).

[User Security Data](#)
[Find in SJT_PERSON](#)
[Find in SJT_DEPT](#)
[Find in SJT_PERSON_USF](#)
[Find in HRS_SJT_JO](#)

Enter Search Values

Job Opening ID:  [Clear All Entries](#)

[Show Security Definitions](#)

Security Data - HRS_SJT_JO Customize | Find |  | 1-5 of 5

	Select	Job Opening ID	Security Access Type	Description	Security Key 1	Security Key 2	Security Key 3	Empl ID
1	☐	900003	010	RS Company	NF			
2	☐	900003	011	RS Business Unit	NFSBU			
3	☒	900003	012	RS Dept Id	NFEDS	NF005		
4	☐	900003	013	RS Location	NFSBU	NFNATIONAL		
5	☐	900003	031	Recruiting Team	L00001			L00001

▼ Permission List Data

[Show Permissions Lists](#)

Security Definition - SJT_CLASS_ALL Customize | Find |  | 1 of 1

	Select	Security Set	Security Access Type	Permission List	Permission List Description	Security Key 1	Security Key 2	Security Key 3	Tree
1	☐								

Find in HRS_SJT_JO page (1 of 2)

▼ Operator Data

[Show Users](#)

User's Data Security Roles and Classes - SCRTY_OPR_ROLE Customize | Find |  | 1 of 1

	Permission List	User ID	Empl ID	Name	RowSecClass Flag	Role Name
1					Role Class	

Find in HRS_SJT_JO page (2 of 2)

Select the ID of the job opening whose transaction security data you want to review.

Click the Show Security Definitions button to populate the Security Data - HRS_SJT_JO grid with the transaction security data securing this job opening's record or records.

Creating Data Permission Security for Managers

To create data permission security for managers, use the Create Manager Users and Sec. component (RUN_PER510).

This section provides an overview of data permission for managers and discusses how to create data permission for managers.

Understanding Data Permission for Managers

Use the Create Row Level Security for Dept Managers process to grant the appropriate data permission security access for department managers. The process will:

- Create a user profile if the manager is new and has no user profile.
- Create or update an existing row security permission list for each department manager, giving them access to the data in the departments that they manage.
- Delete the row security permission list for a user if it is obsolete (for example, the employee is no longer a manager).

The system uses the MgrID value from the Department Profile page (DEPARTMENT_TBL_GBL) to determine a department's manager. Managers will be given access to every department for which their ID is listed in the MgrID field.

Since you can list only one department manager per department, you will have to manually update the profiles of additional department managers. You can do this by assigning the row security permission list the system creates for the official manager to the unofficial manager's profile. Remember that the system will remove this list every time you run the Create Row Security for Mgr process.

Note. The Create Row Security for Mgr process uses the managers' EmplID as their user ID and uses the following naming convention for row security permission lists: HCDP_DEPT_MGR_[manager's EmplID]

Before You Begin

The Create Row Security for Mgr process uses tree-based security to create row security permission lists for managers. Before you run this process, you must have set up a department security tree.

The hierarchy rules of the department security tree apply to these permission lists. If a manager's department has departments reporting up to it on the security tree, the manager will have access to the people in those departments as well as his or her own.

Refresh User Security Join Tables

The Create Row Security for Mgr process creates and modifies row security permission lists and assigns row security permission lists to, or deletes them from, user profiles. Both of these actions require that you:

- Run the Refresh SJT_CLASS_ALL process to refresh SJT_CLASS_ALL with the row security permissions list data.
- Run the Refresh SJT_OPR_CLS process to refresh SJT_OPR_CLS with the new user profile and row security permission list pairings from the User Profile - General page.

The system will not enforce the new data permission set up by the process until you run these refresh processes.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refreshing SJT_CLASS_ALL Process, page 102.](#)

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 103.](#)

Pages Used to Process Row Security for Managers

Page Name	Definition Name	Navigation	Usage
Create Manager Users and Sec. (create row security for manager)	RUNCTL_PER510	Set Up HRMS, Security, User Maintenance, Create Manager Users and Sec., Create Manager Users and Sec.	Use to create and update manager row security permission lists.

Processing Data Permission for Managers

Access the Create Manager Users and Sec. page (Set Up HRMS, Security, User Maintenance, Create Manager Users and Sec., Create Manager Users and Sec.).

Create Manager Users and Sec. page

As Of Date Select the date as of which the row security list permission list should become effective.

User ID Select a default User ID. The system will base the new user IDs on this default.

Create User as locked Select to lock all the new user IDs.

The Create Row Security for Mgr process consists of two PeopleSoft Application Engine processes and one SQR report:

1. HR_PER510.

Determines the changes required in order to maintain data-permission for department managers.

2. HR_PER510_CI

Applies to the database the changes determined by HR_PER510.

3. SQR report PER510

Lists the changes determined by HR_PER510 and applied by HR_PER510_CI and their status.

Note. You must select each process individually and wait for it to complete successfully before selecting and running the next process.

Creating and Locking User IDs

To create and lock user IDs, use the Create Users (CREATE_USERS) and Lock Users (LOCK_USERS) components.

This section provides an overview of security for user IDs and discusses how to:

- Create users.
- Lock users.

Understanding Security for User IDs

Create user IDs for your workforce using Group Build and the Create Users page. Create and populate a group using Group Build and then use the Create Users page to create user IDs for each group member.

Use the Lock Users page to lock user IDs (employee IDs) until you are ready to use them.

See Also

Chapter 22, "Setting Up and Working with Group Definitions," page 541

Common Elements Used in This Section

Group ID	Select the ID of the group whose members require user IDs.
Populate Group	Click to populate the page with the group members.
EmplID and Name	Displays the Empl IDs and names of the individuals in the selected group.
User ID	Displays the user IDs of the individuals once you've clicked the Create User IDs button. The system uses the Empl ID as the User ID.

Account Locked Out? The system selects this option if the user ID account is locked out.

Pages Used to Create and Lock User IDs

Page Name	Definition Name	Navigation	Usage
Create Users	CREATE_USERS	Set Up HRMS, Security, User Maintenance, Create Users, Create Users	Use to create user IDs for a group of individuals.
Lock Users page	LOCK_USERS	Set Up HRMS, Security, User Maintenance, Lock Users, Lock Users	Use to lock or unlock groups of user IDs.

Creating Users

Access the Create Users page (Set Up HRMS, Security, User Maintenance, Create Users, Create Users).

Create Users page

Note. The user ID created by this process will be the same as the employee ID for which it was created.

Group ID Enter or select the group ID that you want to use to create user IDs for a group of individuals.

- User ID

Select a default User ID. The system will base the new user IDs on this default. Once created, you can modify individual profiles on the User ID pages.

If the user ID upon which you are basing the new users has data permission, you will need to run the Refresh SJT_OPR_CLS process. Otherwise the system will not recognize the data permission on the new user profiles.

See [Chapter 5, "Setting Up and Administering HRMS Security," Running the Refresh SJT_OPR_CLS Process, page 103.](#)
- Create User as locked

Select to lock all the new user IDs.
- Create User IDs

Select to run the process.

Locking Users

Access the Lock Users page (Set Up HRMS, Security, User Maintenance, Lock Users, Lock Users).

Lock Users

Populate Group

Group ID: 

Populate Group

Lock/Unlock Group

Lock Group

Unlock Group

⏪ ⏴ ⏵ ⏩

Data				Customize	Find		First	1 of 1	Last
Empl ID	Name	User ID	Account Locked Out?						
			☐					+	-

Lock Users page

Note. You can only lock users created through the Create Users page. The employee ID and user ID are the same value.

- Lock Group

Click to run the process and lock the user IDs (employee IDs) of the entire group.
- Unlock Group

Click to run the process and unlock the user IDs (employee IDs) of the entire group.

Setting Up Security for Local Functionality

This section provides an overview of security for local functionality and discusses how to:

- Grant access to local country functionality.
- Restrict access to local country functionality.

Understanding Security for Local Functionality

Local functionality refers to functionality that is specific to a country. Country-specific functionality is in collapsible sections marked by the country's flag, in the global components. To grant access to local components, you use component permission. To grant access to the local functionality on global components, you use the Setup Global Security page in addition to component permission.

To grant users access to local country functionality on the global menus:

1. Use the Country Specific - Installed HR Countries page (INSTALLATION_SEC) to select the local country functionality that is installed as part of your PeopleSoft HRMS system.

If you do not specify a country here, its local functionality can't be accessed.

2. Grant the primary permission lists access to country-specific functionality using the Setup Global Security page.
3. Assign a user access to a primary permission list containing access to the countries that are required by the user on the User Profile - General page.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Pages Used to Grant Access to Local Country Functionality

Page Name	Definition Name	Navigation	Usage
Setup Global Security	SCRTY_TBL_GBL	Set Up HRMS, Security, Component and Page Security, Setup Global Security, Setup Global Security	Select which country functionality a primary permission list can access on global components.
Setup Global Security - Excluded Panelgroups	SCRTY_GBL_SEC	Click the Excluded Components link on the Setup Global Security page.	Restrict access to local functionality on selected components.

Granting Access to Local Country Functionality

Access the Setup Global Security page (Set Up HRMS, Security, Component and Page Security, Setup Global Security, Setup Global Security).

Setup Global Security

Primary Permission List: HCPPGP Primary List - Global Payroll

Security Detail			
*Country	Description	Excluded Components	
BEL	Belgium	Excluded Components	+ -
NLD	Netherlands	Excluded Components	+ -
CHE	Switzerland	Excluded Components	+ -

Setup Global Security page

Primary Permission List Users assigned to this permission list can access the country-specific sections on global components of the countries that you indicate on this page.

Primary permission lists are defined in the Permission List component. Users are assigned a primary permission list on the User Profile - General page.

Country Select the country or countries whose local functionality users assigned to the primary permission list can access in global components.

Excluded Components When you click Excluded Components, the system displays the Restricting Access to Local Country Functionality page. Using this page, you can restrict access to country-specific functionality in select components.

For example, you can grant a permission list access to Italian sections on all global components except for Personal Data.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312.](#)

Restricting Access to Local Country Functionality

Access the Setup Global Security - Excluded Panelgroups page (click the Excluded Components link on the Setup Global Security page).

Excluded Panelgroups page

Component Name Select the name of the component for which global functionality for this country is being restricted. For example, to restrict access to Italian-specific functionality in the Personal Data component, select the Personal Data component.

Modifying Data Permission Security

This section discusses how to:

- Modify security for hiring and transferring people.
- Allow people to update their own data.

Modifying Security for Hiring and Transferring Workers

PeopleSoft HRMS enables users to assign workers into departments that they can't access for updates. To prevent a user without access from transferring a worker into a department, PeopleSoft HRMS contains a view, DEPT_SEC_VW, that shows only the department IDs that the user is authorized to access.

If you use this view, you need to create a class of users who can access all departments so that they can perform transfers. Also, update the Job record definition in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_SEC_VW. You may also want to change the security view on the DEPARTMENT_TBL component to this view if you want users to only be able to access departments they have access to. This is defined using the Department security sets.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Allowing Workers to Update Their Own Data

PeopleSoft HRMS doesn't allow users to update their own data except in the self-service internet applications. However, sometimes you might want them to update some of their own data in other components. To allow users to update their own data, you implement the PeopleCode function `Allow EmplIDChg` (allow emplID change). The function looks for a single Boolean parameter. When the parameter is set to true, workers can update their own data; when it is set to false, they cannot.

For example, to allow workers to change their own personal data, you enable the PeopleCode function for `PERSONAL_DATA`, the underlying record definition for the Personal Data component. Then workers can change their personal data, but not their job information.

To enable the `Allow EmplIDChg` function:

1. Open the record `PERSON` in PeopleSoft Application Designer.
2. Open the RowInit PeopleCode on the `EMPLID` field.
3. Insert new code after this line:

```
/***** START OF ROW INIT PEOPLECODE *****/
```

4. Insert a row and enter the following code after the first line (a comment) of existing code:

```
if %Component = Component.PERSONAL_DATA then
    AllowEmplIDChg(true);
end-if;
```

5. Save your changes and exit the PeopleCode page.

Workers can now update their own data using the Personal Data page.

To allow workers to update their own data in other places in PeopleSoft HRMS, enter this PeopleCode function in the underlying record definition for each page where you want to allow updates.

Chapter 6

Setting Up and Installing PeopleSoft HRMS

This chapter discusses how to:

- Set up implementation defaults.
- Set up HRMS options on the PeopleTools Options page.
- Administer country codes.
- Set up regulatory regions.
- Establish regulatory transaction types.

Setting Up Implementation Defaults

To set up implementation defaults, use the Installation Table component (INSTALLATION_TBL).

This section provides an overview of implementation defaults and discusses how to:

- Select PeopleSoft applications for your installation.
- Select HRMS options.
- Enter application and industry-specific installation information.
- Enter country-specific installation information.
- Select local country functionality.
- Specify the starting number for system-assigned numbers.
- Define parameters for using third-party applications.
- Enter alternate character types.

Understanding Implementation Defaults

For each site where you implement PeopleSoft HRMS, you must complete the Installation Table to specify various defaults, processing rules, and counters for the system to use. You can have only one set of installation information for each site; this information is *required*.

Warning! You must complete the information on the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR) for each primary permission list. Most of the defaults in PeopleSoft HRMS come from the Org Defaults by Permission Lst component and not the Installation Table pages. Other PeopleSoft HRMS applications have defaults that are based on the Installation Table settings. However, in PeopleSoft Enterprise Human Resources, all defaults are based on the settings that you make on the Org Defaults by Permission Lst component. There are some exceptions to this rule in PeopleSoft Human Resources, and they are noted in the default field level discussion.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312.](#)

When you access the Installation Table pages for the first time, you'll see that PeopleSoft has already entered information for a sample company that you can use as a guide. After you enter your installation information, log off to save your changes.

Pages Used to Set Up and Report on Implementation Defaults

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table, Products	Specify the PeopleSoft applications for your installation.
Global Payroll Country Extensions	INSTALL_GP_SEC	Click the Installed GP Countries link on the Products page.	Select the PeopleSoft Enterprise Global Payroll country extensions you are implementing.
Installed Integration Products	INSTALL_PIP_SEC	Click the Installed Integration Products link on the Products page.	Select the payroll integration pack you are using, if applicable.
HRMS Options	INSTALLATION_TBL1B	Set Up HRMS, Install, Installation Table, HRMS Options	Specify how to drive your system: by person, by position, or both. Enter the PeopleSoft HRMS defaults that are related to your organizational policies.
Product Specific	INSTALLATION_TBL1A	Set Up HRMS, Install, Installation Table, Product Specific	Enter product- and industry-specific installation information.
Country Specific	INSTALLATION_TBL3	Set Up HRMS, Install, Installation Table, Country Specific	Enter country-specific installation information.

Page Name	Definition Name	Navigation	Usage
Installed HR Countries	INSTALLATION_SEC	Click the Installed HR Countries link on the Installation Table - Country Specific page.	Specify which local country functionality to activate for users in PeopleSoft Enterprise Human Resources.
Last ID Assigned	INSTALLATION_TBL2	Set Up HRMS, Install, Installation Table, Last ID Assigned	Specify the number that the system uses to start assigning numbers.
Third Party/System	INSTALLATION_TBL4	Set Up HRMS, Install, Installation Table, Third Party/System	Set the criteria for gathering statistics and activate the SQR security for PeopleSoft HRMS. Define parameters for using third-party applications such as Visio.
Alternate Character	ALT_CHAR_TBL	Set Up HRMS, Install, Installation Table, Alternate Character	Specify the language code and alternate character type.
Installation Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Install, Installation Table Report, Run Control	Run the Installation Table report (PER702). This report lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.

Selecting PeopleSoft Applications for Your Installation

Access the Products page (Set Up HRMS, Install, Installation Table, Products).

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System	Alternate Character
Installed Products						
☒ Human Resources	☐ Education and Government	☐ Enterprise Learning Management				
☒ Benefits Administration	☐ Federal					
☒ Pension Administration	☐ Military	☒ Recruit Workforce				
☒ Stock Administration	☐ French Public Sector	☒ Resume Processing				
☒ Time and Labor	☒ Currency Conversion Utility	☒ Candidate Gateway				
☒ Absence Management	☒ Pay/Bill Management	☒ Talent Acquisition Management				
☒ Payroll for North America	☒ Directory Interface	☒ eBenefits				
☒ Payroll Interface	☐ Employee Portal	☒ eDevelopment				
☒ Payroll Interface for ADP	☐ Government Portal	☒ eCompensation				
☒ Global Payroll Core	☒ HRMS Portal Pack	☒ eCompensation Manager				
Installed GP Countries	☒ General Ledger	☒ ePay				
Installed Integration Products	☐ Project Costing	☒ ePerformance				
		☒ eProfile				
		☒ eProfile Manager				

Products page

Select the applications you are installing. To access that application's functionality, you must select it on this page.

If you are implementing PeopleSoft Global Payroll, select the [Installed GP Countries](#) link to select the Global Payroll country extensions you are implementing.

If you are implementing an integration product, select the [Installed Integration Products](#) link to select the integration product.

(USF) Setting Up PeopleSoft HRMS for Federal Functionality

To set up your database for U.S. federal government functionality, select **Federal** on the Installation Table - Products page and update the Org Defaults by Permission Lst component to point to the U.S. federal government industry and sector.

To set up your database for military functionality, select **Military** on the Installation Table - Products page.

Make your primary permission list preference changes on the Settings page of the Org Defaults by Permission Lst component. To set up a federal database, select an Industry of **Government** and an Industry Sector of **US Federal**.

Selecting HRMS Options

Access the HRMS Options page (Set Up HRMS, Install, Installation Table, HRMS Options).

The screenshot displays the 'HRMS Options' page with the 'HRMS Defaults' tab selected. The page is organized into several sections:

- Company:** GBI Global Business Institute 9999
- Standard Hours:**
 - Min Standard Hours: 10.00
 - Max Standard Hours: 40.00
 - *Default Standard Hours: 40.00
 - Work Period: W Weekly
- Position Management Option:**
 - ☐ Full
 - ☒ Partial
 - ☐ None
 - Online Update Incumbent Limit: 50
- Compensation Rate Codes:**
 - *Default Comp Frequency: M Monthly
 - ☒ Use Rate Code Groups
 - ☒ Use Salary Points
 - ☒ Multi-Step Grade
- Currency:**
 - ☒ Multi-Currency
 - *Base Currency: USD
 - Rate Type: OFFIC

HRMS Options page

Company

Select the default company code. The system uses this default in several tables in PeopleSoft Human Resources.

For a single-company organization, enter the code for that company; for multicompany environments, determine which company is most appropriate.

Standard Hours

To use this functionality to control payroll input in PeopleSoft Global Payroll, review your payroll and make sure that the elements reference the appropriate PeopleSoft Human Resources items. The system does not use them automatically.

Min Standard Hours
(minimum standard hours) and **Max Standard Hours**
(maximum standard hours)

Enter the minimum and maximum standard hours that workers are expected to work in the standard work period. The system enters this information as default values but you can override the values on either the Job Code component (JOB_CODE_TBL) or Position Data component (POSITION_DATA).

Default Standard Hours

Enter the number of hours in a standard work period at the company. This is a required field. When you define preferences for a primary permission list, the standard hours appear by default from the Installation Table. The value that you enter also becomes the default standard hours value for a job in the Job Code Table component and the default standard hours value in the Salary Plan Table component (SALARY_PLAN_TABLE).

PeopleSoft Human Resources uses standard hours to compute a full-time equivalency (FTE) value to prorate holiday hours and pay for part-time and hourly workers.

Work Period Select a standard work period (the time period in which workers must complete the standard hours). Values are stored on the Frequency table.

The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE.

See [Chapter 13, "Setting Up Jobs," Classifying Jobs, page 334.](#)

Position Management Option

To drive part or all of the system by position, change the setting in this group box.

If you use PeopleSoft Enterprise Pension Administration, don't use position management for your retiree organization. If you use position management for your workers, select Partial to exclude retiree departments.

Note. Using position management substantially alters the way that the system processes your data, and requires you to maintain data differently.

Full	The system expects that you track position data for all people in your organization and that you drive your human resource system by position, not by person.
Partial	The system uses whatever position data is available, but doesn't require that you track your entire organization using position management. Select to use the business process on a trial basis or for selected departments.
None	You drive your system by person. You can still assign position numbers to people, but the system doesn't use position data for job records, such as work phone or mail drop ID. This is helpful for tracking only certain positions, such as those above a particular management level.
Online Update Incumbent Limit	The system uses this number to capture the maximum number of incumbents in a position that will be updated online. The system default is 50, but you can adjust this amount based on your organization's server capabilities. If the number of incumbents for the position does not exceed the limit set here, the incumbent data is updated online. When saving data in the Position Data component, and the number of incumbents for the position exceeds the limit set here, the system will display a message that the update of incumbent data will be done through a batch process. The process is scheduled and another message with the process instance number of the job displays. The application engine program calls the Position Data CI so that the UpdateIncumbents function is invoked to perform the incumbent updates.

Compensation Rate Codes

Default Comp Frequency (default compensation frequency)	Select the value to use for reporting salaries. This field is required. The system also uses this value as the default compensation frequency in the Job Code Table.

See [Chapter 13, "Setting Up Jobs," Classifying Jobs, page 334.](#)

Use Rate Code Groups	Select if your organization bundles rate codes to apply percentages when calculating compensation.
Use Salary Points	Select if your organization uses rate codes that have the rate code type points.
Multi-Step Grade	Select if your organization uses a multistep/grade salary plan. This causes the system to use the Salary Step Components page (SALARY_PLAN_T3GBL) to determine compensation rates.

Currency

Multi-Currency	Select if you use different types of currency to pay people. This option affects only PeopleSoft Enterprise Payroll for North America. PeopleSoft Global Payroll uses a separate multicurrency in the payroll system.

Note. Select the Multi-Currency check box on the PeopleTools Options page (PSOPTIONS).

Base Currency	Select a currency code from the values in the Currency Code page (CURRENCY_CD_TABLE). The code you select is the default currency that the system uses to calculate compa-ratios (percent through range calculations) and all total amounts on pages and reports for PeopleSoft Human Resources and PeopleSoft Payroll for North America, regardless of the currency that is used for individual line items.

For example, if the U.S. dollar is your base currency, but your global salespeople submit expense reports in French francs, the system calculates the expense total in U.S. dollars by internally converting all line item amounts to U.S. dollars and displaying the total in U.S. dollars.

Note. All currency defaults in PeopleSoft Human Resources are based on the base currency that you indicate on the Installation Table page, not the Org Defaults by Permission Lst component. The Org Defaults by Permission Lst component doesn't affect the currency defaults on the local country pages.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Enterprise Components*, "Working With Currencies and Market Rates"

Rate Type	Identify the default rate type on which your currency conversion is based. Do this only if you haven't specified a default rate type for a primary permission list on the Org Defaults by Permission Lst component. The system checks the Org Defaults by Permission Lst component for a default rate type first; if none is specified, it looks at this value.

See Also

Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

Chapter 2, "Understanding HRMS," Person or Position Structure, page 5

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting

Chapter 9, "Setting Up and Working with Currencies," page 201

Entering Application- and Industry-Specific Installation Information

Access the Product Specific page (Set Up HRMS, Install, Installation Table, Product Specific).

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System	Alternate Character
Benefits Functions ☐ FMLA Administration ☐ COBRA Administration ☐ Benefits Billing ☐ Retroactive Benefits/Deduction ☒ FSA Claims Administration Start Date for BenAdmin: 01/01/1999 Benefits Deduction Class Order ☒ EE After Tax Then PTax Benefit ☐ PTax Benefit Then EE After Tax Federal Functionality *Default Pay Basis: Per Annum ☐ NFC Indicator NA Payroll / Payroll Interface ☐ Concurrent Calc/Confirm ☒ Automatic Employee Tax Data ☒ Use State Residence for Local T&L / NA Payroll Paysheet Opt ☐ Change Final Check ☐ Change Online Check ☐ Change Reversal Adjustments ☒ Load in Preliminary Calc AP Invoice Number Prefix AP Inv Prefix: H Commitment Accounting ☒ Encumbrance Trigger ☒ Comm Control Budget Processor ☐ Enforce Real Time Budget Check Human Resources ☐ Multi-Company Organization ☐ Automatic Job Termination ☐ Automatic Job Suspension Temporary SSN Mask: 999 Empl ID Field Length: 4 General Ledger GL Version: 9.10.00 Update Version Combination Editing Caching ☐ Cache Validations Cache Retention Days: 0						

Product Specific page

Benefits Functions

FMLA Administration (Family Medical Leave Act), **COBRA Administration** (Consolidated Omnibus Budget Reconciliation Act administration), **Benefits Billing**, **Retroactive Benefits / Deductions** and **FSA Claims Administration** Select to activate these different types of benefits functionality.

Start Date for BenAdmin (start date for Benefits Administration) Enter the start date in PeopleSoft date format: MM/DD/YYYY.

Benefits Deductions Class Order

When the 415(c) limit is met, the deduction classes are limited in the following order: Employee Before-tax contribution, Employee After-tax contribution, Ptax Benefit (Employer Before tax Match), & then the Nontaxable Benefit (After Tax Employer Match). The user can change the deduction class order when the limit is met by selecting PTax Benefit then EE After Tax — Employer Before Tax Contribution is limited first then the Employee After Tax Contribution. The deduction class order will then be Employee Before-tax contribution, Ptax Benefit (Employer Before tax Match), Employee After-tax contribution & then the Nontaxable Benefit (After Tax Employer Match).

(USF) Federal Functionality

Default Pay Basis For the Default Pay Basis, select the value to use for quoting and reporting salaries. This field is required if you selected Federal on the Products page.

NFC Indicator Select this check box to expose National Finance Center (NFC) fields on impacted components and run the associated Peoplecode logic.

NA Payroll / Payroll Interface (North American Payroll and Payroll Interface)

Concurrent Calc/Confirm (concurrent calculation and confirmation) Select to enable the system to run a calculation and confirmation at the same time. It is possible for a person to be in two concurrent runs; this could cause a deadlock situation where the process ends abnormally.

Automatic Employee Tax Data

Select to enable the system to create employee federal, state, and provincial tax records automatically whenever the following criteria are met:

- You hire an employee.
- An employee has a job change requiring a new work tax location.
- You add a concurrent job that requires a new work tax location for an employee.
- You hire an employee from the Applicant Tracking System.
- A person transfers to a new company.

Use State Residence for Local

Automatically selected when you select Automatic Employee Tax Data. Leave this field selected to assume that an employee is a resident of any local tax jurisdiction that happens to be located in the employee's state of residence. If this assumption is not true, clear this field to prevent resident local taxes from being erroneously deducted from an employee's paycheck.

T&L/NA Payroll Paysheet Opt (Time and Labor and Payroll for North America paysheet options)**Change Final Check, Change Online Check, and Change Reversal Adjustments**

Select to enable payroll users to make paysheet changes to data that is retrieved from PeopleSoft Enterprise Time and Labor. PeopleSoft recommends not selecting these check boxes because changes that are made directly to the paysheets aren't transmitted to PeopleSoft Time and Labor.

Load in Preliminary Calc (load in preliminary calculation)

The Pay Calculation process uses the value of the Load in Preliminary Calc field to determine whether to load new available time (additional time that was worked before the job change but not previously loaded on paysheets):

- If you select this check box, the system loads all valid available time to the new paysheets, including new available time.
- If you deselect this check box, the process does not load any new available time to paysheets, except as noted below.

Note. If an employee had a Job data change that caused paysheets to be rebuilt, the Pay Calculation process attempts to reload all valid time and rejects time that is no longer valid as a result of the Job data change. This is true regardless of the setting of the Load in Preliminary Calc field. In this case, the process first rejects all previously loaded time, then it reloads the available time. If Load in Preliminary Calc is not selected, some new time might be loaded, but only for the employee being processed due to the Job data change.

AP Invoice Prefix (accounts payable invoice prefix)**AP Inv. Prefix** (accounts payable invoice prefix)

(Optional) Enter a prefix to be used for accounts payable invoices that are generated through HRMS.

Commitment Accounting

Encumbrance Trigger Select to enable pre-encumbrance and encumbrance triggers to be processed from various online events. Each event causes the system write a record to the Encumbrance Trigger table (ENCUMB_TRIGGER), which is then used as input for the Batch Encumbrance Calculation process (ENC_CALC).

Comm Control Budget Processor (commitment control budget processor) Select to enable real-time budget checking using the Commitment Control Budget Processor in PeopleSoft Financials. Real-time budget checking verifies available funding for job data changes or position data changes that generate encumbrances and pre-encumbrances. The Commitment Control Budget Processor is a PeopleSoft Financials Application Engine program that checks your budget for available funds

This check box is available if you have configured the necessary integration with PeopleSoft Financials 9.0 or higher, but you must separately confirm that the necessary ledgers have been set up. If the ledgers have not been set up, the Commitment Control Budget Processor response to all budget checks is that the charges are invalid.

Note. Real-time budget checking must be additionally activated at the department level.

See [Chapter 11, "Setting Up Organization Foundation Tables," Enabling and Controlling Department Information for Specified Customers, page 306.](#)

Enforce Real Time Budget Check

This setting is applicable only to departments with real time budget checking configured in department table setup.

Select to prevent users from saving certain critical job data and position data changes when real-time budget checking shows that there are not sufficient budgeted funds for the change.

Critical changes in the Job Data component include hiring, rehiring, and adding a concurrent job. Critical changes in the Position Data component include creating a position, increasing the head count for a position, changing a position from inactive to active, and changing the Pre-Encumbrance Indicator for a position from *None* or *Requisition* to *Immediate*. Any other changes that affect encumbrance and pre-encumbrance calculations are considered non-critical.

If you select this check box, users must address the budget errors before the system will allow the critical job data or position data changes to be saved. If you do not select this check box, users can choose to ignore the budget errors for critical changes.

Note. Users can always ignore budget check errors related to non-critical job data and position data changes.

Human Resources

Multi-Company Organization	Select if your organization comprises more than one company. Select if you use PeopleSoft Pension Administration, because you set up companies specifically to house your pension payees.
Automatic Job Termination	Select to automatically terminate any job that has an end date. The system does this by creating a termination row for the job.
Automatic Job Suspension	Select to activate substantive job suspension for workers working in temporary assignments where the substantive job requires suspension for the duration of the assignments.
'Temporary SSN' Mask (temporary Social Security number mask)	Enter a three-digit number to be a default Social Security number for all applicants or people whose Social Security numbers are unavailable. Assign a value that is greater than 800 so that the temporary number doesn't conflict with valid Social Security numbers.
Empl ID Field Length	Enter the number of characters to be used for employee IDs.

General Ledger

GL Version	Displays the version of PeopleSoft Enterprise General Ledger that is interfacing with PeopleSoft HRMS. Click the Update Version button if you change versions. The system will automatically update the GL Version.
Note. Full ChartField functionality is available only when you use PeopleSoft General Ledger 8.4 or higher. Real-time budget checking is available only when you use PeopleSoft Financials 9.0 or higher with Commitment Control.	
Update Version	Click to test the integration with PeopleSoft Enterprise Financials and display the latest version of Financials.
Cache Validations	Select to cache the results of your validations. This improves performance by enabling you to cached validations.
Cache Retention Days	Enter the number of days to store validation results. The system will delete anything in the cache older than this.

See Also

PeopleSoft Enterprise Benefits Administration 9.1 PeopleBook, "Understanding PeopleSoft Benefits Administration," Benefit Information Automation

Entering Country-Specific Installation Information

Access the Country Specific page (Set Up HRMS, Install, Installation Table, Country Specific).

Products

HRMS Options

Product Specific

Country Specific

Last ID Assigned

Third Party/System

Country

Country:

USA

USA

Language Code: ENG English [Installed HR Countries](#)

Canadian Parameters

Last ROE Nbr:

1

Last Dir Dep File Creation Nbr:

*Census Metro Area:

(Invalid Value)

Last FSA CarryForward Claim #:

*Industrial Sector:

(Invalid Value)

Last CPS Transmission ID Nbr:

Australian Parameters

☒ Education & Government

Japanese Parameters

☐ Additional Appointment Enabled

USA Parameters

☐ Two-Question Format(Ethnicity)

Country Specific page

Country

Country Select a country for the system to enter as a default value.

Language Code The system displays the default base language for the database.

Installed HR Countries Select this link to go to the Installed HR Countries page, where you can select which local country functionality is installed in the system.

(CAN) Canadian Parameters

Last ROE Nbr (last record of employment number), **Last Dir Dep File Creation Nbr** (last direct deposit file creation number), **Last FSA CarryForward Claim #** (last flexible spending account carry-forward claim number), and **Last CPS Transmission ID Nbr** (last CPS transmission ID number)

Enter the last ROE, direct deposit file, flexible spending account carry-forward claim, and CPS transmission ID numbers that were used.

The system increases each number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. These values are used in PeopleSoft Payroll for North America when running a Canadian payroll.

Census Metro Area (census metropolitan area)

Enter the Census Metro Area (CMA) code that is prescribed by Statistics Canada for this location. The system uses the default CMA code that you enter only if no default CMA code is specified on the Org Defaults by Permission Lst component. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required for Canadian companies.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312.](#)

Industrial Sector

Used for Canadian employment equity purposes. The system uses the default value that you enter only if no default industrial sector is specified on the Org Defaults by Permission Lst component. This value is used as the default for the Canadian Industrial Sector field in the Department component; and it identifies the industrial sector with which people in a given department are associated. This field is required.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312.](#)

See [Chapter 11, "Setting Up Organization Foundation Tables," Maintaining Departments, page 299.](#)

(AUS) Australian Parameters

Education & Government

Select this check box for Australian public service organizations.

(JPN) Japanese Parameters

Additional Appointment Enabled Select if you will be implementing Additional Appointment tracking (*Kenmu*). Selecting this check box activates functionality to create a dummy additional appointment job code when you create a new business unit.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "(JPN) Tracking Additional Appointments (Kenmu)."

(USA) USA Parameters

Two-Question Format (Ethnicity) Select this check box if you want to collect U.S. employee ethnicity data using the two-question format defined in the U.S. Office of Management and Budget's (OMB) 1997 Standards for Maintaining, Collecting and Presenting Federal Data on Race and Ethnicity.

When this check box is selected, U.S. employees who access the self-service Ethnic Groups page see a version of the page that uses the two-question format.

When this check box is deselected, U.S. employees see the same version of the self-service Ethnic Groups page that non-U.S. employees see. This general-purpose version of the page does not include any questions. Instead, employees specify one or more ethnicities in an Ethnic Groups grid.

Selecting Local Country Functionality

Access the Installed HR Countries page (click the Installed HR Countries link on the Country Specific page).



Installed HR Countries page

The system displays a flag for each country that has special local functionality in PeopleSoft Human Resources:

- Select a check box to activate local functionality for that country. Users who have security access can see and work with that country's local functionality.
- Deselect a check box to hide that local functionality from your users.

If the check box for a country is selected on this page, but you don't grant country access to the users' primary permission list on the Setup Global Security page (SCRTY_TBL_GBL), users will not see local country functionality.

See [Chapter 5, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 124.](#)

Specifying the Starting Number for System-Assigned Numbers

Access the Last ID Assigned page (Set Up HRMS, Install, Installation Table, Last ID Assigned).

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System	Alternate Character
Last Employee ID Assigned:	42	Last H/S Claim Nbr Assigned:	94000			
Last HS Non-Employee ID Assgn:	1924002	Last Incident Nbr Used:	70000007			
Last TL Contractor ID Assigned:		Last Journal Nbr Assigned:				
Last COBRA Emplid Assigned:	10002	Last Help Context Nbr Used:	10000000			
Last Position Nbr Used:	5555555	Last Retro Pay Request Seq Nbr:	1000164			
Last Grievance Nbr Used:	1	Last Retro Ded Request Seq Nbr:				
Last Car Nbr Assigned:	3616008	Last FSA Claim Nbr Assigned:	10039			
Last Demand ID Assigned:	19	Last Illness Nbr Assigned:				
Last Combination Code Assigned:	52	Last Illness Report # Assigned:				
Last AP Invoice Number:		Last Temp Assignment # Used:	7			
Last Template Hire Seq # Used:	118	Last Used Element Number:	210880			
Last Succession Plan ID:	1	Last OSHA Case Nbr Assigned:	9045			

Last ID Assigned page

In PeopleSoft HRMS, there are several fields where you can either enter numbers manually or let the system assign them.

The following table lists auto-numbering fields.

Field	Application	Business Process
Last Employee ID Assigned	PeopleSoft Human Resources	Administer Workforce Recruiting Workforce
Last HS Non-Employee ID Assgn	PeopleSoft Human Resources	Monitor Health and Safety Administer Training
Last TL Contractor ID Assigned	PeopleSoft Time and Labor	Administer Workforce
Last COBRA Emplid Assigned	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Administering COBRA
Last Position Nbr Used	PeopleSoft Human Resources	Manage Positions Plan Successions
Last Grievance Nbr Used	PeopleSoft Human Resources	Manage Labor Administration
Last Car Nbr Used	PeopleSoft Human Resources	Administer Company Cars
Last Demand ID Assigned	PeopleSoft Human Resources	Budget Training

Field	Application	Business Process
Last Combination Code Assigned	PeopleSoft Human Resources PeopleSoft Payroll for North America	Commitment Accounting
Last AP Invoice Number	PeopleSoft Human Resources	
Last Template Hire Seq # Used	PeopleSoft Human Resources	Administer Workforce
Last Succession Plan ID	PeopleSoft Human Resources	Plan Successions
Last H/S Claim Nbr Assigned	PeopleSoft Human Resources	Monitor Health and Safety
Last Incident Nbr Used	PeopleSoft Human Resources	Monitor Health and Safety
Last Journal Nbr Assigned	PeopleSoft Payroll for North America	Administer GL Interface
Last Help Context Nbr Used	PeopleSoft HRMS	Customizing Windows Online Help
Last Retro Pay Request Seq Nbr	PeopleSoft Payroll for North America	Manage Retroactive Pay
Last Retro Ded Request Seq Nbr	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Manage Retroactive Benefits/Deductions
Last FSA Claim Nbr Assigned	PeopleSoft FSA Claims Administration	Administer FSA
Last Illness Nbr Assigned	PeopleSoft Human Resources	Monitor Absence
Last Illness # Report Assigned	PeopleSoft Human Resources	Monitor Absence
Last Temp Assignment # Used	PeopleSoft Human Resources	Administer Workforce
Last Used Element Number	PeopleSoft Human Resources	Manage Profiles

<i>Field</i>	<i>Application</i>	<i>Business Process</i>
Last OSHA Case Nbr Assigned	PeopleSoft Human Resources	Monitor Health and Safety Meet Regulatory Requirements

To let the system assign numbers for the fields on this page, enter the last number that you used in the field. The system increases that number by one when it assigns a new number. The system updates the Installation Table every time it assigns a number.

Note. To avoid maintaining two different sets of numbers, either always assign numbers manually or always let the system do it.

ID Considerations

When you convert ID data to PeopleSoft Human Resources from another system, enter the highest number that was used in your previous system so that you don't duplicate IDs. If the last ID you assigned in your previous system was 1000, enter *1000* in the Last Employee ID Assigned field. When you add a person in PeopleSoft Human Resources, the system assigns an ID of *1001* and updates the Last Employee ID Assigned field accordingly.

To always enter IDs manually, enter 9999999999 (ten 9's) in the Last Employee ID Assigned and Last Applicant ID Assigned fields.

If you use Social Security or insurance numbers as IDs, change the formatting for the employee ID field using PeopleSoft Application Designer.

Zero-filled Numbers

To make data entry faster and more accurate on several pages when you enter a number that the system has assigned, the system enters zeros before the number. For example, when you enter *4*, you see *00000004*, a total of 8 characters per number. This occurs in the following fields:

- Job Opening
- Requirements Search
- Grievance
- Incident
- Claim
- Position

Note. If you have already assigned numbers that aren't zero-filled, change their numbering so that the system can accurately track them when you convert the data to PeopleSoft Human Resources.

For more information about data conversion, ask your human resources project leader or see the PeopleSoft Application Designer documentation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Defining Parameters for Using Third-Party Applications

Access the Third Party/System page (Set Up HRMS, Install, Installation Table, Third Party/System).

ProductsHRMS OptionsProduct SpecificCountry SpecificLast ID AssignedThird Party/SystemAlternate Character

Performance Monitor Parameters

* Start Time For Stats Gathering:11/29/2000 12:00AM☐ Gather Statistics for Table

* Stop Time For Stats Gathering:11/29/2000 12:00AM☐ Gather Statistics Globally

* Write Interval:300Seconds

Third Party Settings

Organization Chart:None

System Defaults

Max Number of Rows in Scrolls:25Commit After Empl Processed:300

Third Party/System page

Performance Monitor Parameters

Start Time For Stats Gathering (start time for statistics gathering) and **Stop Time For Stats Gathering** (stop time for statistics gathering)

Enter the date and time of the start and stop.

Gather Statistics for Table

Select to gather statistics locally.

Gather Statistics Globally

Select to gather statistics globally.

Write Interval

Enter the number of seconds for gathering the statistics.

Third Party Settings

Organization Chart

Enter the type of third-party program you use to create organizational charts with your human resources data.

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System Defaults

- Max Number of Rows in Scrolls** (maximum number of rows in scrolls)

Enter the maximum number of rows in a scroll-controlled data box for third-party systems.
- Commit After Empl Processed** (commit after employee processed)

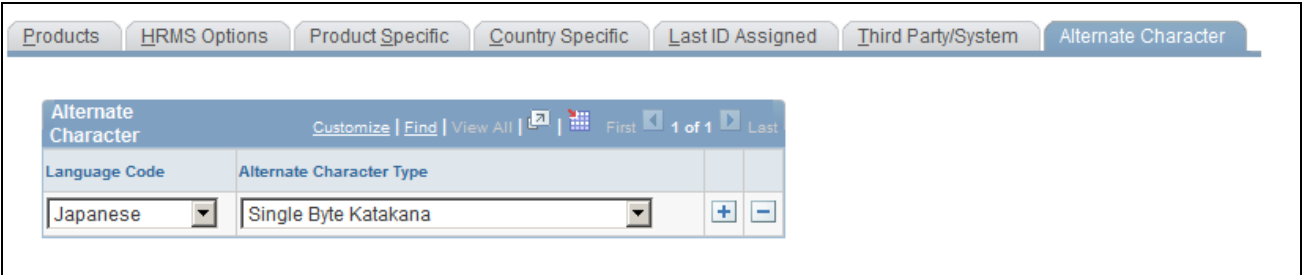
Enter the maximum number of people that a third-party system processes before committing.

See Also

Enterprise PeopleTools PeopleBook: Data Administration Tools
Chapter 25, "Setting Up and Building Organization Charts," page 625

Entering Alternate Character Types

Access the Alternate Character page (Set Up HRMS, Install, Installation Table, Alternate Character).



Alternate Character page

- Note.** Because you are setting the alternate character code on the Installation Table, the setting affects your entire HRMS application configuration. Make sure that you account for all language codes for your installation.
- If you don't specify an alternate character type for a language code that a user is working with, and the user tries to enter characters in an Alternate Character field, a warning message appears.

If you specify an alternate character type for a language code, and a user enters any other character type in an Alternate Character field, a warning message appears.
- Note.** You can ignore the warning message and enter the data in another character set, but problems can occur when data is sorted in multiple alternate character sets.

Setting Up HRMS Options on the PeopleTools Options Page

To set up HRMS options on the PeopleTools Options page, use the PeopleTools Options component (PSOPTIONS).

This section discusses how to set up HRMS options on the PeopleTools Options page.

You use the PeopleTools Options page to set a variety of values that are related to:

- Multi-company organizations.
- Organizations that conduct business using more than one currency.
- Multiple jobs functionality.

Access the PeopleTools Options page on the PeopleTools, Utilities, Administration menu.

See *Enterprise PeopleTools PeopleBook: Data Administration Tools*

Select the following check boxes, as applicable, to activate these kinds of functionality:

Multi-Company Organization	Select if your organization comprises more than one company or if you use PeopleSoft Pension Administration to set up companies specifically to house your pension payees.
Multi-Currency	Select to enter data in more than one currency. For example, if you have offices in the United States and Italy, you may want to calculate pay rates in both U.S. dollars and Italian lira. If you select <i>Multi-Currency</i> , the system displays a Currency Code field on pages where amount fields appear.
	Note. <i>Multi-Currency</i> doesn't affect PeopleSoft Global Payroll, which has its own multiple currency functionality.
Multiple Jobs Allowed	PeopleSoft HRMS requires that you leave this option selected. Multiple job functionality must be active so that PeopleSoft Human Resources can manage data for people with whom you have different types of organizational relationships (employee, contingent worker, and person of interest).

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Administering Country Codes

To administer country codes, use the Country Table (COUNTRY_TABLE), the Country Table – HR (HR_COUNTRY_TABLE), and the State/Province (STATE_DEFN) components.

This section provides an overview of country codes and enterprise integration points and discusses how to:

- View and update country information.
- Specify the address format for a country.
- Specify the county, state, and city for a country.
- Define additional information for HRMS reporting purposes.
- Add the state, province, or equivalent entity for a country.

Understanding Country Codes

On many pages in PeopleSoft Human Resources, a country appears as part of the address for a person, a company, or an office. Countries are represented as codes, such as CAN for Canada, and they are listed in the Country Table component. In the Country field on any page, the system displays a default country code, which you can change. The Org Defaults by Permission Lst component and the Business Unit Options Defaults component (BUS_UNIT_OPT_HR) can affect this default code. You can define the information that users should capture for addresses in specific countries using the Address Format page (ADDR_FORMAT_TABLE) in the Country Table component.

You need codes for all the countries where your organization does business and where the people in your system live. The Country Description page (COUNTRY_DEFN) includes an extensive list of predefined countries and codes. The page is updated with each version of PeopleSoft Human Resources according to the countries that are recognized by the International Standards Organization (ISO).

If you need a new country code, notify your PeopleSoft account manager so that we can add it to the Country Table for the next version of PeopleSoft Human Resources.

Pages Used to Administer Country Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Country Description	COUNTRY_DEFN	Set Up HRMS, Install, Country Table, Country Description	View or update country information.
Address Format	ADDR_FORMAT_TABLE	Set Up HRMS, Install, Country Table, Address Format	Specify the address format for the country that is selected from the Country Table.

Page Name	Definition Name	Navigation	Usage
Valid Address	EO_ADDR_VALIDAT	Set Up HRMS, Install, Country Table, Valid Address	Specify the county, state, and city for the country that is selected from the Country Table.
Country Table - HR	HR_COUNTRY_DEFN	Set Up HRMS, Install, Product and Country Specific, Country Table - HR, Country Table - HR	Specify additional information about a country for HRMS reporting purposes.
State/Province	STATE_DEFN	Set Up HRMS, Install, State/Province, State/Province	Add a state, province or equivalent entity for the country that is selected from the Country Table.
Country Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Install, Country Table Report, Run Control	Run the Country Table report (PER708) that prints a list all country character codes.

Viewing or Updating Country Information

Access the Country Description page (Set Up HRMS, Install, Country Table, Country Description).

Country Description page

2-Char Country Code (two-character country code) Enter the code that the U.S. government assigned to the country, if applicable.

EU Member State (European Union member state) Select if this is an EU member state. This field is for your reference only and doesn't impact system processing or reporting.

Specifying the Address Format for a Country

Access the Address Format page (Set Up HRMS, Install, Country Table, Address Format).

Country Description

Address Format

Valid Address

Country:

AUTAustria

*Address Edit Page:

EO_ADDR_DFT_SEC

Enable Address Search

Enable Address Validation

Address Fields

CustomizeFind1-9 of 9Last

	Field Name	Edit Label Override	Include in Display?	Include in Print?	Line Number	Position Number	Use Description?	Pre Separator	Post Separator
1	COUNTRY		☐	☐			☐		
2	ADDRESS1		☒	☒	1	1	☐		
3	ADDRESS2		☒	☒	2	1	☐		
4	ADDRESS3		☒	☒	3	1	☐		
5	ADDRESS4		☒	☒	4	1	☐		
6	CITY		☒	☒	5	1	☐		
7	STATE		☒	☒	5	2	☒		
8	POSTAL		☒	☒	5	3	☐		
9	COUNTY		☒	☒	6	1	☐		

Address Format page

- Address Edit Page

Select an address page from the list of available options. The system will display the list of fields on that page in the Address Fields group box.
- Enable Address Search

Select to enable the address search.
- Enable Address Validation

Select to enable the system to validate address entries for state or province and city as shown on the Valid Address page.

Address Fields

- Field Name

The Field Name column displays the address fields available in the PeopleSoft HRMS.
- Edit Label Override

Enter a different label to override the displayed Field Name, if required for this country.

- Include in Display?** Select to have the system include this field when an address appears in read-only mode. Deselect this check box for specific fields if your organization wants to display addresses in a format that is different from how addresses appear during data entry.
- Include in Print?** Select to have the system print this field whenever an address in this country will be printed.
- Line Number** Enter the line on the page on which this field should appear.
- Position Number** Indicate this field's position in the selected line.
- Use Description?** Select to have the system display a full description for this field.
- Pre Separator and Post Separator** Enter separator characters for the address elements if applicable (for example and em dash).

Specifying the County, State, and City for a Country

Access the Valid Address page (Set Up HRMS, Install, Country Table, Valid Address).

Country: JPN Japan

Valid addresses

	Postal	State	City	Address 1		
1	064-0811	01	Sapporo-shi	Chuo-ku Minami Juichijo Ni	+	-
2	100-0004	13	Chiyoda-ku	Ohtemachi	+	-
3	100-0011	13	Chiyoda-ku	Uchisaiwai-cho	+	-
4	100-6106	13	Chiyoda-ku	Nagata-cho, Sanno Park Tow	+	-
5	102-0074	13	Chiyoda-ku	Kudan Minami	+	-
6	102-0082	13	Chiyoda-ku	Ichiban-cho	+	-
7	105-0023	13	Minato-ku	Shibaura	+	-
8	106-0045	13	Minato-ku	Azabu Juban	+	-

Valid Address page

Valid Addresses

The Valid Address page stores state/province codes with corresponding cities, as entered on the State/Province page. When you select *Enable Address Validation* on the Address Format page, the system checks address entries against the values stored on the Valid Address page to verify that the city and state or province match.

Note. (JPN) Japanese postal data is stored in both the Postal Code Table and the Valid Address table (EO_ADDR_VALIDAT). To keep the Valid Address table in sync with the Postal Code Table, you must enter new postal data in the Postal Code Table page. The system will not update the Postal Code Table with values you enter on the Valid Address page.

See Also

[Chapter 17, "Setting Up Local Country Functionality," \(ITA\) Setting Up Italian City Codes, page 447](#)

[Chapter 17, "Setting Up Local Country Functionality," Maintaining the Postal Code Table, page 454](#)

Defining Additional Information for HRMS Reporting Purposes

Access the Country Table - HR page (Set Up HRMS, Install, Product and Country Specific, Country Table - HR, Country Table - HR).

Country Table - HR

Country: AUS Australia

 Australia

Australian Public Service

Country Code:

 Belgium

NIS Country Number:

 France

INSEE Country Number:

 Netherlands

Nationality:
☐ Target Group - Diversity Mgmt

 USA

Country Code for 1042:

Country Table - HR page

(AUS) Australia

Australian Public Service

Enter the Australian Public Service four digit country code here.

(BEL) Belgium

NIS Country Number
(National Institute for Statistics country number)

Enter the NIS Country Number for reporting hires and terminations to the Social Insurance.

(FRA) France

INSEE Country Number (National Institute for Statistical and Economic Studies country number)

INSEE is an official statistics and economics organization in France. This organization issues a number that is used by the tax authorities, Social Security, the Chamber of Commerce, and others to identify an enterprise and its entities.

(NLD) Netherlands

Nationality	Enter the four-digit nationality code for the country. Nationality codes are defined by the Netherlands coding standard (NEN) and are used in wage declarations for the Netherlands. The system uses the Country code specified for an employee on the Citizenship/Passport page to determine which nationality code applies to the employee.
Target Group - Diversity Mgmt (target group - diversity management)	Select this check box to identify this country as a target group for diversity reporting purposes in the Netherlands. If you're administering a Dutch workforce, may want to track information on the national origin of an employee. Employee national origin is based on either their birthplace or their parent's birthplace. Note. From December 31, 2003 the SAMEN law is no longer a legislative requirement. However, we continue to provide the ability to track employees' national origin to enable you to monitor workforce diversity.

(USA) USA

Country Code for 1042	(USA) Enter the country code used when reporting wage and tax data to federal and state government agencies in the EFW2 format. (E&G) Enter the country code for nonresident alien processing

Adding the State, Province, or Equivalent Entity for a Country

Access the State/Province page (Set Up HRMS, Install, State/Province, State/Province).

State/Province

Country:

BEL

Belgium

Postal Abbreviation:

LX

Numeric Code:

10

*Province:

Luxemburg

State/Province page

PeopleSoft delivers the State/Province table with all states, provinces, and equivalent geographical entities (such as Dutch communities and French departments) for all supported countries. The codes are based on standard postal codes. PeopleSoft updates this table with each version.

You need these state or province codes for all countries where your organization does business. You use this information in many address fields in the system.

- Postal Abbreviation

The state or province code is automatically displayed.
- Numeric Code

Enter the numeric code, if applicable. The U.S. federal government assigns a numeric code to each state for reporting purposes. You don't need to enter numeric codes for new Canadian provinces.

Setting Up Regulatory Regions

To set up regulatory regions, use the Regulatory Region component (REG_REGION).

This section provides an overview of enterprise integration points and discusses how to define regulatory regions.

Page Used to Set Up Regulatory Regions

Page Name	Definition Name	Navigation	Usage
Regulatory Region	REG_REGION	Set Up HRMS, Install, Regulatory Region, Regulatory Region	Set up a regulatory region.

Defining Regulatory Regions

Access the Regulatory Region page (Set Up HRMS, Install, Regulatory Region, Regulatory Region).

Regulatory Region

Regulatory Region:

CANON

*Description:

Canada - Ontario

Country:

CAN

Canada

Security Access:

Available to All

Default Record Group Set IDs

Set ID:

CANON

Canada - Ontario

Clone from Existing Regulatory Region

OR

Regulatory Region page

Country

Select a country from the list. When you create a regulatory region, you must specify the country to which the region belongs. This enables country-specific edits even when a state-level or provincial-level region is used in a system transaction. If the country you want to add isn't in the list of values, add that country to the system using the Country Table.

Security Access

Select a security access level from the list. Because many companies have users working with only one, limited set of regulatory regions, this feature enables you to hide the other regulatory regions from the user. The values are stored on the Translate table. The Regulatory Region prompt edit views use these values to limit the user's Regulatory Region choices to the regions to which the user has access. Values are as follows:

- *Available To All*: Users can select this region.
- *Not Available To Anyone*: No users can select this region.
- *With Global Security Only*: Only users who have access to that region's country functionality assigned to their primary permission list can select that region.

See [Chapter 5, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 124.](#)

Note. If you choose not to maintain the country-level data security, then select *Available to All* or *Not Available to Anyone* to provide universal access to regulatory regions. To simplify maintenance, availability is established only once for each regulatory region and is used for all transactions.

Default Record Group SetIDs

Use this group box to specify the SetIDs that make up this regulatory region. Since Regulatory Region is used to drive set processing in some applications, such as Health and Safety, Regulatory Region is a set control value. The default record group SetIDs establish an initial set processing relationship for this new regulatory region.

SetID

When you add a regulatory region, the SetID field is available for entry, and the Clone From Existing Regulatory Region field is unavailable for entry. The system places a default setID in the SetID field that bears the same name as the Regulatory Region Code that you just defined. If you haven't defined a SetID that matches this code, select another applicable SetID for your regulatory region from the list of valid values. The SetIDs in the list were set up using the TableSetID table. You can select only from those SetIDs.

Note. Before you can specify SetIDs, you must define SetIDs, record groups, set control values, and TableSet record group controls, using the components on the PeopleTools, Utilities, System Administration menu.

See [Chapter 3, "Working with System Data Regulation in HRMS," page 9.](#)

Clone from Existing Regulatory Region

You can clone the SetIDs attached to this new regulatory region from an existing regulatory region. Use this option if the new regulatory region that you're defining requires the same default record group SetIDs as those that you've already created for another region.

Enter the regulatory region that you want to clone.

See Also

[Chapter 5, "Setting Up and Administering HRMS Security," page 39](#)

Enterprise PeopleTools PeopleBook: Data Administration Tools

Establishing Regulatory Transaction Types

To establish regulatory transaction types, use the Regional Transactions component (REG_TRX_REGION).

This section provides an overview of regulatory transactions and discusses how to add regulatory regions to a transaction.

Understanding Regulatory Transactions

Two sets of regulatory transactions are already defined in the system as shown in the following table:

<i>Regulatory Transaction</i>	<i>Countries or Regions Included</i>	<i>Reason</i>
STANDARD	All countries that are supported in the system.	Most applications apply regulatory and legislative edits at the country level.
HANDS (Health and Safety)	All countries that are included in the system, plus the Canadian provinces.	Most applications apply regulatory and legislative edits at the country level, but Canada has specific provincial laws governing their Health and Safety reporting.

Use the two pages in the Regional Transactions component (REG_TRX_REGION) to assign new regulatory regions to these transaction types (if you have added countries or regulatory regions to the system) and to establish new regulatory transactions.

Pages Used to Update or Add Regulatory Transactions

Page Name	Definition Name	Navigation	Usage
Regional Transactions - Transaction	REG_TRX	Set Up HRMS, Install, Regional Transactions, Transaction	Update the regulatory transaction description or add a new regulatory transaction.
Regional Transactions - Regions in Transaction	REG_TRX_REGION	Set Up HRMS, Install, Regional Transactions, Regions in Transaction	Define the regulatory regions that make up a regulatory transaction type.

Adding Regulatory Regions to a Transaction

Access the Regions in Transaction page (Set Up HRMS, Install, Regional Transactions, Regions in Transaction).

Transaction Regions in Transaction

Regulatory Transaction: STANDARD

Regulatory Region	Country	Security Access	Description		
ARG	ARG	ALL	Argentina	+	-
AUS	AUS	ALL	Australia	+	-
BEL	BEL	ALL	Belgium	+	-
BRA	BRA	ALL	Brazil	+	-
CAN	CAN	ALL	Canada	+	-
CHE	CHE	ALL	Switzerland Regulatory Region	+	-
CHN	CHN	ALL	China	+	-

Regions in Transaction page

Regulatory Region Select the regulatory regions that belong to this transaction.

Installing Person Objects

To install person objects, use the Person Object Installation component (INSTALL_PERSON).

This section discusses how to install person objects.

Page Used to Install Person Objects

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Person Object Installation	INSTALL_PERSON	Set Up HRMS, Install, Person Object Installation, Person Object Installation	Select installation settings for the Add a Person component (PERSONAL_DATA).

Selecting Personal Data Installation Settings

Access the Person Object Installation page (Set Up HRMS, Install, Person Object Installation, Person Object Installation).

Person Object Installation

Installation Settings

☒ **Show Checklists**

☐ **Perform Automatic Search/Match**

Default Checklists

Employee Checklist:

Contingent Worker Checklist:

HCEMP

HCCWR

Add Employment Instance

Add Contingent Worker Instance

Person of Interest Type Checklist

[Customize](#) | [Find](#) | [First](#) | [1-12 of 12](#) | [Last](#)

#	POI Type	Description	POI Checklist	Description
1	00000	Unknown		
2	00001	COBRA Qualified Beneficiary		
3	00002	Pension Payee		
4	00003	Stock - Board Member		
5	00004	Stock - Non-HR Employee		
6	00005	Global Payroll Payee		
7	00006	Student Refund		
8	00007	External Trainee	HCPOI	Add Person of Interest Inst.
9	00008	External Instructor		
10	00009	Campus Solution Person		
11	00010	Other		
12	00011	Other Payee		

Person Object Installation Page

Installation Settings

Show Checklists

Select to show the Checklists Code field on the Organizational Relationships page (PERSON_DATA4), enabling users to select a checklist for the person they are adding and create a record in the Person Checklist component (PERSON_CHECKLIST).

Perform Automatic Search/Match

Select to perform an automatic search and match when you add a person to the PERSONAL_DATA component. The system will search the database to determine that you are not entering a duplicate record.

Default Checklists

Select the default checklists that the system will display in the Checklist Code field on the Organizational Relationship page when you add to add one of the following relationships for the new person:

- Employee.
 - In the Employee Checklist field, select the default checklist for commercial employees.
 - In the French Public Sector Emp field, select the default checklist for French public sector employees.
- Contingent Worker.

In the Contingent Worker Checklist field, select the default checklist for contingent workers.

- Person of Interest

For each POI type listed in the Person of Interest Type Checklist grid for which you want a default checklist, select the checklist.

The system will create a record in the Person Checklist component by identifying this checklist code on the Organizational Relationship page when you first create the person.

Set up checklists on the Checklist component (CHECKLIST_TABLE).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Creating Checklists.

Chapter 7

Setting Up and Working with Search/Match

This chapter provides an overview of PeopleSoft Search/Match and discusses how to:

- Set up Search/Match.
- Work with Search/Match.

Understanding Search/Match

To use the full functionality of your system, you must maintain the integrity of your database. With users from many departments entering data into your system, you want to minimize the entry of duplicate or multiple records. Search/Match enables you to define criteria to check for duplicate or multiple ID records. The searchable ID types (called Search Types) are:

- Person (EmplID)
- Applicant (HRS_PERSON_ID within PeopleSoft Enterprise Talent Acquisition Manager)

Note. PeopleSoft delivers these ID types as translate values inside the SM_TYPE field. They are delivered as *Active*, but you can inactivate them depending on the applications that you license. Do not, however, add or delete ID type values.

For each of these ID types, departments or business areas can, based on user security roles, define their own search criteria to perform a search. The criteria can include defining search rules and placing them in the desired order within a search parameter. Each department or business area can also set what data to display in the results to identify a possible matching ID. Departments and business areas can set up multiple search result codes and give security access to all users or restrict it to specific users who have a certain security role assigned.

You can also set rules and parameters to permit only ad hoc searches to enable users with the appropriate security to perform ad hoc searches without the constraints of predefined criteria.

Data returned in a search result can contain sensitive information. You can control whether to entirely or partially mask a field or display the entire field. The masking configuration can be controlled with user security access. With search results and display controls defined, users can perform Search/Match to determine if a record already exists before adding one.

You can also enforce the use of Search/Match by setting Search/Match to trigger when a user enters data and saves a new ID by transferring the user directly to the list of IDs that match the criteria. When you enforce Search/Match at save time, the user does not need to navigate to the Search/Match component and reenter the data to determine whether the ID exists.

You define search rules to identify which fields to search for and how to use them to perform the search. You can use one or multiple search rules. If you use multiple search rules, Search/Match applies the rules in the order that you define. Starting with the first rule, if the system finds at least one match according to that rule, it will stop searching. However, if it finds no match for that rule, it will continue to the next rule, and so on.

Also, if you use multiple search rules, you should order the rules from the most restrictive to the least restrictive. For example, rule 1 could return matching IDs when first name, last name, phone number and national ID exactly match. Rule 4 could return matching IDs when only the first and last name match. In this example, rule 4 could return more potential matching IDs than rule 1. The search rule used by Search/Match could therefore be used as an indicator to users of how significant the returned results are.

A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.

When a user runs the search, the system searches according to these rules and search orders until it either encounters a potential duplicate or executes all search sequences and finds no potential duplicate.

Use search result codes to specify the data that you want Search/Match to return in the grids on the Search Results page for the potential matching IDs that it finds. You can define field-level security for fields that you consider sensitive. For example, you might allow some users to see the full birth date, but restrict other users to see only the year (or nothing at all), depending on the Primary Permission List in their user profile.

Some search rules, search parameters, and search results are delivered with your system. You can use these as they are, modify them, or add as many as you need.

Warning! Adding new search fields require significant programming effort and is not recommended.

See Also

[Chapter 7, "Setting Up and Working with Search/Match," Automatic Search, page 166](#)

Automatic Search

Automatic search reinforces the use of Search/Match when you create a new ID in a transaction page. To trigger an automatic search from the transaction page, associate the component that contains that page with an active search parameter. When the user enters all of the necessary data to create a new ID on that page and saves the transaction record, Search/Match begins automatically. The system uses the predefined search parameter and the data entered by the user as search criteria. If Search/Match does not find matching IDs, the system saves the transaction successfully. If Search/Match finds at least one matching ID, the system displays the search results inside a grid on the Search Results page.

If the component name is associated with a search parameter code and a search result code, Search/Match displays the search results inside a grid on the Search Results page. This enables users to review the potential duplicate IDs without having to manually navigate to the Search/Match page. After reviewing the results on the Search Results page, the user clicks Return and is instructed to either click OK to continue saving the new ID or to click Cancel to avoid saving the transaction and investigate further.

Note. This setup is valid only when creating person IDs from HRS_PREP_FOR_HIRE component.

Warning! To display the Search Results page at save time, you must have a security role with access to the component interface HCR_SM_SEARCH.

See [Chapter 7, "Setting Up and Working with Search/Match," Viewing Search Results, page 186.](#)

See *Enterprise PeopleTools PeopleBook: Security Administration*

Note. This setup is valid only when creating person IDs from the Personal Data (PERSONAL_DATA) component for commercial HRMS and the Employee Hire (EE_HIRE) component for Federal HRMS.

Enabling the Auto Search/Match Feature

You enable Automatic Search/Match processing in HRMS by selecting the Perform Automatic Search/Match check box on the Person Object Installation page (INSTALL_PERSON).

When you select the check box, the system checks to see if a Search Parameter and a Search Result code have been associated with the PERSONAL_DATA component (or the EE_HIRE component for Federal). If it finds codes, it displays these rule names. If not, the system generates a warning informing you that Automatic Search/Match processing will not occur until you associate Search Parameter and a Search Result code with the PERSONAL_DATA or EE_HIRE components.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Person of Interest Types, page 229.](#)

Understanding Automatic Search Conditions

Search/Match uses phone and email values to perform the search only when a phone or email value is marked as preferred. Therefore, to use PhoneRule and EmailAddressRule inside a search rule triggered automatically when you save a new ID, the ID must have a preferred phone number and preferred email address.

When Address1Rule, Address2Rule, Address3Rule, Address4Rule, CityRule, CountryRule, CountyRule, PostalRule or StateRule are inside a search rule triggered when you save a new person ID, Search/Match uses the address fields for only the home address type to perform the search. That is, if any address type other than HOME is entered, Search/Match does not use the address fields as search criteria.

Setting Up Search/Match

To set up Search/Match use the Search Match Rules (HCR_SM_RULE), Search/Match Parameters (HCR_SM_PARM), Search/Match Result Fields (HCR_SM_RSLT_FLDS), Search/Match Results (HCR_SM_RESULT), and Search/Match (HCR_SM_SEARCH) components.

This section discusses how to:

- Define search rule codes.
- Define search parameters.
- Define search permissions.
- View or add Search/Match result fields.

- Configure Search/Match results.
- Enter search results details.
- Define search results exceptions.
- Configure search result permissions.

Pages Used to Set Up Search/Match

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search/Match Rules	HCR_SM_RULE	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Rules, Search/Match Rules	Define sets of fields to search for and identify how to search for them.
Search Parameters	HCR_SM_PARM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Parameters	Combine and order search rules. The combination (called the search parameter) is what the users select prior to performing a search to determine the search fields that they are permitted to search on.
Search Permissions	HCR_SM_PERM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Permissions	Identify who can use the search parameter to perform the search. Also identify which component names, if any, should use the search parameter as part of saving a new ID in the database.
Search/Match Result Fields	HCR_SM_RSLT_FLDS	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Result Fields, Search/Match Result Fields	View or add fields that are available to define the search results.
Search Results	HCR_SM_RESULT	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Results, Search Results	Specify which result fields to include in the search results and control how to display their values. Note. Be careful not to confuse this page with the page also called <i>Search Results</i> with a similar object name (HCR_SM_RESULTS), which is the page on which Search/Match displays returns from a search.

Page Name	Definition Name	Navigation	Usage
Search Results Detail Page	HCR_SM_RDTL_PG	Click the Page Navigation button that appears on the Search Results page when you select the Use Detail Page option.	Define the page to use to view more information about a specific ID returned by Search/Match.
Search Results Exceptions	HCR_SM_RESULT_EXCP	Click the Exceptions link on the Search Results page.	Define field-level security exceptions to the data display control that is set on the Search Results Permissions page
Search Result Permissions	HCR_SM_RSLT_PERM	Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Results, Search Result Permissions	Identify who should have access to this search result code. Also identify which component, if any, Search/Match should use this result code when a new ID is added and a potential duplicate ID is found.

Defining Search Rule Codes

Access the Search/Match Rules page (Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Rules, Search/Match Rules).

Search/Match Rules

Search Rule Code: PSCS_10
Search Type: Person

*Description: Name,Addr,City,Bday,Gender,SSN
☐ Ad Hoc Search

*Sequence	*Search Field		Required	Usage	Start Position	Number of Characters	Length		
1	Address1Rule	Address Line 1	☒	Begins With	1	5	55	+	-
2	CityRule	City	☒	Begins With	1	10	30	+	-
3	FirstNameSrchRule	First Name Search	☒	Begins With	1	3	30	+	-
4	LastNameSrchRule	Last Name Search	☒	Begins With	1	5	30	+	-
5	DateOfBirthRule	Date of Birth	☒	Equals			10	+	-
6	GenderRule	Gender	☒	Equals			1	+	-
7	NationalIDRule	National Id	☒	Equals			20	+	-

Search/Match Rules page

Ad Hoc Search

Select to permit ad hoc searches from this search rule.

An ad hoc search enables users to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John*; whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

Search Fields

Search fields are delivered with your system.

Warning! Adding new search fields require significant programming effort and is not recommended.

Sequence

Enter the order in which you want the search fields to appear when used inside a search parameter.

Search Field and Field Description

Select each search field that you want to assign to this search rule code. When you exit the field, the system displays the associated description. Search fields are the fields on which users are permitted to search.

Search fields are delivered with your system. Adding or modifying a search field value requires a significant programming effort. Do not attempt to delete a search field.

Note. When you include name, national ID, phone, email, or address fields in the rule without the types (Name Type, National ID Type, phone type, email type or address type), the system searches on all national IDs, phones, emails or addresses in the system for that individual.

Required

Select this check box to require a value in the search field to find a potential match on this search rule. Selecting this check box is useful for making the rule more restrictive.

If the check box is not selected, the system accepts blank or nonexistent for this field inside this search rule. For example, if all the fields inside a search rule are marked as required, the user must provide data for each of those search fields to find a match on this rule. However, if the Required check box is not selected, for example, for Date of Birth, the user can still search on that search rule without specifying a date of birth.

Usage

Identify how you want the search to evaluate the field value:

Begins With: The value must begin with this data. When you select this value, the Start Position field appears with a default value of 1, and the Number of Characters fields are available for you to define. You cannot modify the start position default value.

Contains: The value must contain this data but can be preceded or followed by other data. When you select this value, the Start Position field appears with a default value of 1, and the Number of Characters fields are available for you to define.

Equals: The value must be exactly equal to this data.

Not Used: Do not use this field value in this search.

Start Position and Number of Characters

Enter the character position where you want the compare to start, and enter the number of characters from that start position to include in the compare.

For example, if the usage selected for National ID is *Contains*, and you enter a start position of 3 and the number of characters of 5, the system compares against the 3rd, 4th, 5th, 6th, and 7th characters in the field value. It will return matching IDs for which the National ID contains these 5 characters.

If the usage selected was *Begins With*, the start position is has a default value of 1 and you need to specify how many characters from the first character that Search/Match should use to perform the search.

Length

Indicates the number of characters in the search field. When you exit a particular field in the Search Field column, the system displays the total number of characters in the associated field.

See [Chapter 7, "Setting Up and Working with Search/Match," Understanding Search/Match, page 165.](#)

Defining Search Parameters

Access the Search Parameters page (Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Parameters).

Search Parameters

Search Permissions

Search Parameter: PSCS_TRADITIONAL

Search Type: Person

*Description: CS_Person_Traditional

Status: Active

☐ Ad Hoc Search

Search/Match Rules

Customize | Find | First 1-5 of 5 Last

Search Order	*Search Rule Code			
10	PSCS_10	Name,Addr,City,Bday,Gender,SSN	View Definition	+ -
20	PSCS_20	SSN Only	View Definition	+ -
30	PSCS_30	Name,Bday,Gender	View Definition	+ -
40	PSCS_40	Name,Gender	View Definition	+ -
50	PSCS_50	Name Only	View Definition	+ -

Search Parameters page

Ad Hoc Search

Select to permit only ad hoc searches from this search parameter.

An ad hoc search enables users to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John*; whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *John*).

Note. Automatic search cannot be performed from a search parameter set to permit ad hoc searches.

Search/Match Rules

Search Order

Enter the order in which to apply the search rule codes of this search parameter. Enter the most restrictive search rule in the lowest order number and the least restrictive search rule in the highest order number.

You can reorder the search rules at any time. When you reorder the rules and save the page, the system displays the rules in the most recent numerical order that you entered.

Search/Match processes the lowest order search rule first; if it finds one or more possible matches, it stops the search and returns the results. If it finds no results, it continues to the next search rule, and so on.

In the search results, the system displays the search order number that corresponds to the search rule where potential matching IDs are found.

You can use only one search rule for an ad hoc search; therefore Search Order fields do not appear when the Ad Hoc Search check box is selected.

Search Rule Code and Rule Code Description	Enter the search rule code to use. When you exit the field, the system displays the search rule description. You must enter at least one search rule to create a valid search parameter.
View Definition	Click this link to access the Search/Match Rules page on which you can view or edit the rule definition.

Defining Search Permissions

Access the Search Permissions page (Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Permissions).

The screenshot displays the 'Search Permissions' page. At the top, there are tabs for 'Search Parameters' and 'Search Permissions'. Below the tabs, the 'Search Parameter' is 'PSCS_TRADITIONAL' and the 'Search Type' is 'Person'. The 'Description' is 'CS_Person_Traditional' and the 'Status' is 'Active'. There is an 'Ad Hoc Search' checkbox.

The 'Search Parameters Access' section has a 'Full Access' checkbox. Below it is the 'Restricted Security Access' section, which contains a table with the following data:

*Role Name			
1			

The 'Search/Match Used in Transaction' section contains a table with the following data:

*Component Name			
1	ADM_APPL_ENTRY1	Add Application	
2	ADM_PROSPECT_PROG	Create/Update Prospects	
3	QUICK_ADMIT	Quick Admit	
4	SCC_BIO_DEMO	CS Person Maintenance	

Search Permissions page

Search Parameters Access

Full Access Select to enable all users to use the search parameter code.

Restricted Security Access

This area appears only when the Full Access check box is not selected.

Role Name and Role Description	Restrict the use of this search parameter code to users that have specific roles inside their security profile.

Search/Match Used in Transaction

Component Name and Component Description	If you want to enforce the use of Search/Match when adding a new ID, select the component name where adding a new ID occurs. The system will then initiate Search/Match when a user enters the data to create a new ID and saves the transaction. You can restrict the search to specific components whether you give permissions to all roles or only to specific roles.

Note. A component name can be associated with only one search parameter. However, the same search parameter can be used inside several component names. Select all components where the search parameter should be used.

Note. This field is available only when the Search Type is *Person* or *Organization*.

See [Chapter 7, "Setting Up and Working with Search/Match," Understanding Search/Match, page 165.](#)

Viewing or Adding Search/Match Result Fields

Access the Search/Match Result Fields page (Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Result Fields, Search/Match Result Fields).

Search/Match Result Fields

Search Result Field: DateOfBirth
Search Type: Person

Description: Date of Birth
☐ Effective Dated

Search Result Data

Record Name:	PERSON	PERSON record
Field:	BIRTHDATE	Date of Birth

System Data - not available for update

Search/Match Result Fields page

Many Search/Match result fields are delivered predefined and are available for you to use when defining search result codes. The text *System Data - not available for update* appears for these fields on the Search/Match Result Fields page. You cannot edit the data for the predefined search fields. You can, however, select additional fields to make available for your search result codes.

When you select *Add a New Value* and enter a name for the results field, the Search/Match Result Fields page appears with enterable fields for you to select the record and field to make available within the search results. To control how the values for a field appear in the results, use the Search/Match Results setup page.

Note. When search result fields are created based on records that are either effective-dated or type-related (such as address type, email type, phone type, and so on), Search/Match returns a row for each of the dates (historical, current and future dates) and types. For example, the field Gender is included in the PERS_DATA_EFFDT record. If you use Gender as a search result field, then a person with multiple rows on PERS_DATA_EFFDT will display multiple rows with the same gender in the search results grid. This is to make sure the evaluation of potential duplicate IDs is done across all dates and types applicable to each ID. If your organization prefers to see a limited number of rows, you can create the search result fields based on a view that could include logic to limit the effective date to display only current information or logic to return only a specific type (for example select address information where Address Type is *Home*).

Configuring Search/Match Results

Access the Search Results page (Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Results, Search Results).

Search Results

Search Result Permissions

Search Result Code:

PSCS_TRAD_MASK

Search Type:

Person

*Description:

CS_Pers Traditional Result Mask

Status:

Active

Result Set

☒ Use Detail Page

Page Navigation

Search/Match Result Fields

Customize

Find

First

1-9 of 9

Last

Sequence	*Result Field		Display Option	Number of Characters	Day	Month	Year	Length		
1	NameType	Name Type	Display Entire Field					3	Exceptions	+ -
2	EffectiveDat	Name Effective Date	Display Entire Field					10	Exceptions	+ -
3	FirstName	First Name	Display Entire Field					30	Exceptions	+ -
4	MiddleNam	Middle Name	Display Entire Field					30	Exceptions	+ -
5	LastName	Last Name	Display Entire Field					30	Exceptions	+ -
6	NationalID	National ID	Display Last	4				20	Exceptions	+ -
7	DateOfBirth	Date of Birth	Display Partial Dat		☐	☐	☒	10	Exceptions	+ -
8	Gender	Gender	Display Entire Field					1	Exceptions	+ -
9	CampusID	Campus ID	Display First	2				16	Exceptions	+ -

Search Results page

Result Set

Use Detail Page

Select this check box to display a Detail link beside each ID returned from a search.

When you select Use Detail Page, the Page Navigation button appears.

Page Navigation

This button appears only when the Use Detail Page check box is selected.

Click to access the Search Results Detail page, on which you can define the page to which you want users to be directed to see more details about a specific ID.

Note. To be transferred to the page that you define here, the user must have security access to the page.

Search/Match Result Fields

Sequence	Enter the order by which the system displays results in the in the Search/Match results grid. You can reorder the result fields at any time. When you reorder the fields and save the page, the system displays the result fields in the most recent numerical sequence that you entered.
Result Field and Field Description	Select the data to return with the search results. Fields used to perform the search (search fields) can be different from the fields needed to review the results (result fields). The result fields are defined in the Search/Match Result Fields page.
Display Option	Displays the default display control for that field. You can override this. Select <i>Display Entire Field</i> or <i>Mask Entire Field</i> to display or hide the entire field value respectively . The other options are: <i>Display First:</i> Displays the first specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the beginning of the field value. <i>Display Last:</i> Displays the last specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the end of the field value. <i>Display Partial Date:</i> Displays the specified parts of a date field value. When you select this, the Day, Month, Year check boxes appear. You must select which parts of the date to display. For example if you select <i>Year</i>, only the year will appear.
Number of Characters	Enter the number of first or last characters of a field value to display.
Day, Month, Year	Select the parts of the date to display for a date value.
Length	Displays the number of characters possible for the field value.
Exceptions	Click this link to access the Exceptions page, on which you can define field-level exceptions to these results. Warning! Search/Match returns all potential matching IDs regardless of data permission security. You must use field-level security to mask or partially mask sensitive data. See Chapter 5, "Setting Up and Administering HRMS Security," page 39.

Entering Search Results Details

Access the Search Results Detail page (click the Page Navigation button that appears on the Search Results page when you select the Use Detail Page option).

Search/Match Results

Search Results Detail Page

Search Result Code: PSCS_TRAD_MASK

Search Type: Person

Description: CS_Pers Traditional Result Mask

Status: Active

Detail Page Parameters

Menu Name: CC_BIO_DEMO_DATA

Menu Bar Name: USE

Item Name: SCC_BIO_DEMO

Page Name: SCC_BIO_DEMO_PERS

Action Mode: Upd/Dsplay

Search Results Detail page

Detail Page Parameters

Menu Name, Menu Bar Name, Item Name, and Page Name Select each item that corresponds to the page that you want to use to provide more details about a specific ID.

Action Mode Select the action mode to define in which mode you want your users to access the detail page. Options are:

Add

Correction

Data Entry

Upd/Dsplay (update/display)

Update

Defining Search Results Exceptions

Access the Search Results Exceptions page (click the Exceptions link on the Search Results page).

Search/Match Results

Search Results Exceptions

Search Result Code: PSCS_TRAD_MASK

CS_Pers Traditional Result Mask

Result Field: DateOfBirth

Date of Birth

Field Level Security Exceptions

Customize | Find | First 1-3 of 3 Last

*Primary Permission List	Permission List Description	Display Option	Length		
EODS1000	Directory Interface	Display Entire Field	10	+	-
EOEC9010	Credit Card Interface	Display Entire Field	10	+	-
HCCPCSSA50NL	CS The Netherlands	Display Entire Field	10	+	-

Search Results Exceptions page

You can define exceptions to the search results that you set up on the Search Results page. For example, you might have partially masked the birth date field in your search results, but you want the entire field to appear for those who have a need to know. Using primary permission lists, you can set those exceptions here.

See [Chapter 5, "Setting Up and Administering HRMS Security," page 39.](#)

See *Enterprise PeopleTools PeopleBook: Security Administration*

Field Level Security Exceptions

Primary Permission List and Permission List Description Select the primary permission lists of the users who will be exceptions to the result field selected. When you exit the field, the system displays the permission list description.

Display Option Select the display option to use as the exception to the display option selected on the Search Rules page.

Configuring Search Result Permissions

Access the Search Result Permissions page (Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match Results, Search Result Permissions).

Search Results

Search Result Permissions

Search Result Code:

PSCS_TRAD_MASK

Search Type:

Person

Description:

CS_Pers Traditional Result Mask

Status:

Active

Search Result Code Access

☒ Full Access

Search/Match Used in Transaction

Customize | Find | | First 1 of 1 Last

	*Component Name	
1	SCC_BIO_DEMO	CS Person Maintenance + -

Search Result Permissions page

- Full Access

Select this check box to enable all users to use the search result code
- Role Nameand Role Description

Enter roles to restrict the use of this search result code to users that have this role inside their security profile. These fields appears when the Full Access check box is not selected.
- Component Name

This field is available only when the Search Type is *Person*.

If you use automatic search and want to display a warning message to alert users when potential duplicate IDs exist and you want to display the results of the automatic search, select the same component name or names that you selected on the Search Permissions page for the search parameter. You can restrict the search to specific components whether you give permissions to all roles or to only specific roles.

Note. A component name can be associated with only one search result code. However, the same search result code can be used inside several component names. Select all components where the search result code should be used. If Search/Match finds potential matching IDs that correspond to the data entered, the system returns a Search Results page showing the matching IDs that were found.

See [Chapter 7, "Setting Up and Working with Search/Match," Automatic Search, page 166.](#)

See Also

[Chapter 7, "Setting Up and Working with Search/Match," Viewing Search Results, page 186](#)

Working with Search/Match

This section provides an overview of the difference between search box search and Search/Match, search box searches, Search/Match searches, and discusses how:

- Select criteria for a search.
- View search results.

Understanding the Difference Between Search Box Search and Search/Match

The difference between record search from search dialog pages and using Search/Match is this: You use search box pages to retrieve existing records using limited search criteria to view or update data, and you use Search/Match to use a larger set of search criteria that detect duplicate or multiple records in your database or to identify different records that contain duplicate data that should uniquely identify only one ID.

Maintaining the integrity of IDs and their associated data is important toward maximizing system features and functionality. Search/Match helps you to prevent the entry of duplicate or multiple records by determining whether a person (EMPLID), an organization (EXT_ORG_ID, if you license PeopleSoft Enterprise Campus Solutions) or an applicant (HRS_PERSON_ID, if you license PeopleSoft Talent Acquisition Management) already exists in your database before creating (or recreating) the record.

You use Search/Match to define rules and search parameters that determine if duplicate or multiple records exist with the uniquely identifying data relevant to your business processes. You can configure which results fields to display with the returned matching IDs. You can also choose to fully display, mask, or partially mask result field values based on business processes and the level of security that your users need.

You can reinforce the evaluation of possible duplicates by setting up Search/Match to run automatically at save time when a user creates a new ID.

See Also

[Chapter 7, "Setting Up and Working with Search/Match," Automatic Search, page 166](#)

Pages Used for Search/Match

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search Criteria	HCR_SM_SEARCH	- Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match, Search Criteria - Workforce Administration, Personal Information, Search for People, Search Criteria	Enter criteria to search for duplicate or multiple records.
Default Search Result	HCR_SM_USERDFLT	Click the User Default link on the Search Criteria page.	Assign a search result code for the user ID to use as a default value for a specific search type.
Search Results	HCR_SM_RESULTS	Enter criteria on the Search Criteria page and click Search or click one of the search by order number Selective Search buttons to launch a manual search.	View Search/Match results of a manual search and investigate potential duplicate IDs. Note. Do not confuse this page with the Search Results setup page that has a similar object name (HCR_SM_RESULT) and on which you define search result fields.

Selecting Criteria for a Search

Access the Search Criteria page (Set Up HRMS, System Administration, Utilities, Search/Match, Search/Match, Search Criteria or (Workforce Administration, Personal Information, Search for People, Search Criteria).

Search Criteria

Search Type: Person

☐ Ad Hoc Search

Search Parameter: PSCS_TRADITIONAL

CS_Person_Traditional

Search Result Rule

Search Result Code: PSCS_TRAD_RES

CS_Person Traditional Results

[User Default](#)

Search

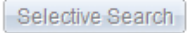
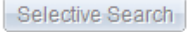
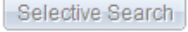
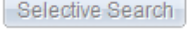
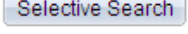
Clear All

Carry ID Reset

Search Criteria

Search Fields	Value:
Address Line 1	
City	
First Name Search	JOHN
Last Name Search	SMITH
Date of Birth	

Search Criteria page (1 of 2)

Gender		
National Id		
Search by Order Number		
Search Order	Description	Selective Search
10	Name,Addr,City,Bday,Gender,SSN	
20	SSN Only	
30	Name,Bday,Gender	
40	Name,Gender	
50	Name Only	
Return to Search Results		

Search Criteria page (2 of 2)

Search Type

The system displays the search type (*Person*) selected to access the page. If you have licensed PeopleSoft Talent Acquisition Management, you could have selected *Applicant*, and if you have licensed PeopleSoft Campus Solutions, you could have selected *Organization*.

Search Parameter

Displays the parameter code selected to access the page. The search parameter prompt on the search dialog page enables you to select only the search parameters to which your security roles permit you access.

Depending on your responsibilities, you might need to access the Search/Match page several times a day. If you use the same search parameter frequently, click the Save Search Criteria link on the search dialog page to save it prior to accessing the Search/Match page. Then, in the future, you can select it from the Use Saved Searchprompt.

Ad Hoc Search

The system selects this to indicate that the Search Parameter code is set to perform a ad hoc search.

An ad hoc search enables you to bypass the institution's predefined search standards to perform a configured search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John*, whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

For an ad hoc search, the Search Criteria page displays the Search fields set up inside the search parameter code that you selected; and an Operand field appears for each search field. The Operand field enables you to perform a search that begins with, contains, or equals the search value that you enter.

Also, for ad hoc searches, the Search by Order Number area of the page does not apply and therefore does not appear.

See [Chapter 7, "Setting Up and Working with Search/Match," Defining Search Parameters, page 171.](#)

Search Result Rule**Search Result Code**

Select the search result code to use for displaying the results of this search. The search result code contains all of the information regarding how to display the IDs retrieved by Search/Match and what data to return to help you quickly determine whether an ID already exists for the constituent that you are looking for

User Default

Click to access the Default Search Result page where you can select a search result code to use as a default value for this search type.

The system permits one default search result code per search type for each user ID.

Search

Click this button to launch a search on all of the values that you entered and to retrieve results for the most restrictive search order number defined in the Search Parameter that you selected. When the search is complete, the system transfers you to the Search/Match Results page.

Note. When you click Search, the system searches only for the data specified. It filters the search orders that are defined for the Search Parameter that you selected. For example, if Search/Match finds at least one potential matching ID at search order number 10, it will stop the search and display the results obtained at search order number 10. If no potential matching IDs are found, the search continues to the next search order number, and so on. If you want to search using a specific Search Order number, use the Selective Search button for that order number.

Clear All

Click this button to clear all entries in the Value fields.

Carry ID Reset

Click to reset a carried ID to *New*.

On the Search Results page, you can select to carry an ID as you access pages to further investigate a potential duplicate. When you click Carry ID Reset, the system stops carrying the selected ID and uses an ID of *New* instead. This is especially useful when you need to access pages that create new IDs.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312.](#)

Search Criteria**Search Fields**

The system displays each of the search fields associated with the search parameter that you selected.

Operand

These fields appear only when the search parameter permits ad hoc searches. When the parameter permits ad hoc searches, the system selects the Ad Hoc Search check box and hides the Search by Order Number area of the page.

Select the operand to perform the search. The valid values are *Begins With*, *Contains*, and *Equals*. These values are delivered as translate values and should not be changed.

Value

For each search field that you specify, enter the value to search for. If predefined values are available (such as for gender), you can select from them from the prompt. If no predefined values exist, you can type the data directly into the value field.

Search by Order Number

This area of the page appears only if the Ad Hoc Search box is not selected.

When you enter criteria in the Value fields, the Selective Search button for the search order defined with the fields becomes available.

Click the Selective Search button to conduct specific searches.

When the search is complete, the system transfers you to the Search/Match Results page.

Viewing Search Results

Access the Search Results page (enter criteria on the Search Criteria page and click Search or click one of the search by order number Selective Search buttons to launch a manual search).

Search Results

Search Type: Person ☐ Ad Hoc Search

Search Parameter: PSCS_TRADITIONAL CS_Person_Traditional

Result Code: PSCS_TRAD_RESUL CS_Person Traditional Results

▼ Search Results Summary

Number of ID's Found: 23 [Return to Search Criteria](#)

Search Order Number: 50 Name Only

Search Results								Customize Find View All First 1-20 of 31 Last
Results		Results2		Additional Information				
		Empl ID	Name Type	Name Effective Date	First Name	Middle Name	Last Name	
1	Carry ID Detail							
2	Carry ID Detail	AD5024	PRF	03/23/2001	John		Smith	
3	Carry ID Detail	AD5024	PRI	03/23/2001	John		Smith	
4	Carry ID Detail	AD6000	PRF	01/21/2002	Joanne		Smith	
5	Carry ID Detail	AD6000	PRI	01/21/2002	Joanne		Smith	

Search Results page

Search Results						Customize Find View All First 1-20 of 31 Last
Results		Results2		Additional Information		
		Empl ID				
1	Carry ID Detail			Person Organizational Summary		Relations With Institution
2	Carry ID Detail	AD5024		Person Organizational Summary		Relations With Institution
3	Carry ID Detail	AD5024		Person Organizational Summary		Relations With Institution
4	Carry ID Detail	AD6000		Person Organizational Summary		Relations With Institution
5	Carry ID Detail	AD6000		Person Organizational Summary		Relations With Institution

Search Results page: Additional Information tab (for an automatic search)

When you enter criteria on the Search Criteria page and click Search or any of the search by order number Selective Search buttons, the system launches the search and transfers you to the Search Results page with the results displayed as shown in the sample page above.

For an automatic search, the Search Results page is displayed as shown in the sample page below. That is, if Search/Match is set to launch automatically with both the search parameter permission and search result permission configured with a component name that enables creation of IDs. When you try to add an ID on a component that is set up that way and Search/Match detects potential duplicates at save time, the Search Results page displays a warning message indicating that at least one potential ID in the database matched the data entered to create the ID and what where the data used to perform the automatic search.

Search Results

WARNING: Potential duplicates were found - this person may already exist in the database. Refer to the list below for possible matches to the person you are adding. After you select the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation.

▼ Match Criteria

Required	Description	Usage	Search Value
☒	First Name Search	Begins With	JO
☒	First Name Search	Begins With	JO
☒	Last Name Search	Begins With	SMIT
☒	Last Name Search	Begins With	SMIT
☒	Gender	Equals	M
☒	Gender	Equals	M

▼ Search Results Summary

Number of ID's Found: 15

Search Order Number: 40

Search Results

Customize | Find | View All | First 1-18 of 18 Last

Results Results2 Additional Information

	Empl ID	Name Type	Name Effective Date	First Name	Last Name	National ID
1	Carry ID					
2	Carry ID TYEOHLCWI04	PRI	01/01/2007	John	Smith	609112315
3	Carry ID TQ2043	PRI	05/01/2002	John	Smith	555917643

Search Results page, Results tab (automatic search)

See Chapter 7, "Setting Up and Working with Search/Match," Understanding Search/Match, page 165.

On either version of the Search Results page, you can view the list of results returned by the search, view the details of any record returned in the search, and click Carry ID to have the system carry the ID forward as you subsequently access pages for further investigation.

Search Results Summary

Number of ID's Found Displays the number of IDs that met the search criteria.

This number may be smaller than the number of rows returned in the Search Results grid because the grid might include the same ID multiple times. If the name field is included in the search result code selected, the search returns rows for each name type and effective date that match the search criteria entered. If the national ID field is included in the search result code, the search returns rows for each national ID entered for the record matching the search criteria.

Search Order Number Indicates the search order number at which results were found and indicates how precise the search was—the lower the number, the more restrictive the search and the greater the chance of having found duplicate IDs. This number can be used as an indicator of how close the returned IDs match the criteria entered.

Search Results

Columns appear on the Results and Results 2 tabbed pages based on the search result code selected. Depending on the user's role security, some values in the columns might be masked, partially masked, or fully displayed.

Carry ID Click this button for the system to capture and carry the ID to the ID field of the search box on the pages that you subsequently access so that you do not need to remember the ID.

Detail The Detaillink appears if the selected search result code was configured to provide the user with a link to a page for more information about an ID.

Search Results Page: Additional Information Tab

This tab appears only when the search type is *Person*.

Person Organizational Summary Click to access the Person Organizational Summary page, on which you can review the status of this person of interest record.

Relations With Institution Click to access the Campus Solutions Relations With Institution Detail page, on which you can determine the type of relations that the individual has with your institution and further clarify whether this is the individual for whom you are searching.

Note. This link is used by customers who are also using PeopleSoft Campus Solutions and only shows if you have selected the Student Administration check box and/or the Contributor Relations check box on the Installation Table - Products page (INSTALLATION_TBL1).

Chapter 8

Setting Up and Working with Languages

This chapter provides an overview of language support in PeopleSoft and discusses how to:

- Set language preferences.
- Work with alternate character sets.

Understanding Language Support in PeopleSoft

A key part of any multiple-country system is language support. PeopleSoft streamlines the process of using multiple languages. For example, to change from one language to another during a session, you change the contents of only one field, and the system changes to the new language. You can change from German to English to French and back to German all in one session. This section introduces you to language support in PeopleSoft.

PeopleSoft uses several methods to ensure full multilingual capabilities. PeopleTools contains built-in ways of translating field labels, page displays, and menu items. When you log in to the system, everything appears in your language of preference, assuming that it has been translated.

If you modify PeopleSoft by adding new fields, pages, or menu items, you can use the built-in PeopleTools capabilities to translate those items into your supported languages.

To maintain full language capability when you modify your application, you enter translations of any new items. If you use only one language and enter new items in that language, that's fine. However, if you use more than one language and you do not translate the new items, they appear in your original language, even when you change to another language. Then you may see more than one language on your page.

This table lists the supported languages and language codes:

<i>Language Code</i>	<i>Language</i>
CFR	Canadian French
DAN	Danish
DEU	German
DUT	Dutch
ESP	Spanish
FRA	French

Language Code	Language
ITA	Italian
JPN	Japanese
KOR	Korean
POL	Polish
POR	Brazilian Portuguese
SVE	Swedish
ZHS	Simplified Chinese
ZHT	Traditional Chinese

Note. The translation of objects that we deliver is performed once, before we distribute the system, and includes all the pages and menu items that are in the application. However, you must translate new field labels and any data—names, comments, long descriptions, and short descriptions—for each new record that you create or in the data that you add.

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Setting Language Preferences

This section discusses how to:

- Use the Language Preference page.
- Use the International Preferences page (INTERNATL_PREF).

Note. PeopleSoft has built-in language preference capabilities. Regardless of your system's base language, you can view a PeopleSoft application in any supported language.

Using the Language Preference Page

PeopleSoft enables you to view a Foreign Language sign-on page for each language that is supported by the system. Because you are viewing PeopleSoft pages through an internet browser, you must be sure that the browser accepts the language that you want to use. Check the language preferences of your browser to select the correct options.

Once setup is established, click the Language Name button to view the sign-on page in the specified language. The language you select determines the language in which the entire application is displayed in the PeopleSoft Internet Architecture.

Note. The Language Code used in My System Profile page (USER_SELF_SERVICE) is applied only when you run reports and produce emails.

Using the International Preferences Page

After you log in to a PeopleSoft application, you can change your language preference anytime during your session on the International Preferences page. When you change your language preference, everything appears in the new language, assuming that it's translated. If you change your language of preference, the language code change isn't written to the database, but is stored in PeopleTools memory for the duration of the current session.

The language code you indicate is the language that the system uses for future pages that are displayed during the current session. This is the language of the session until you either log off or change your language preference. The tool set uses the language code to apply country-specific formats for numbers, dates, and currencies. If you change the language code during a session, your user profile language preference is not affected. The next time you log in, you'll see the language that is associated with your user ID.

Making a change means that everything you see—pages, menus, and field contents—appears in your new language preference.

Note. Your PeopleSoft language selection is independent of your Windows language options. To change your Windows language parameters, select Start, Settings, Control Page.

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Enterprise PeopleTools PeopleBook: Security Administration

Working with Alternate Character Sets

This section provides an overview of alternate character system architecture and discusses how to:

- Configure your system for alternate character functionality.
- Enter alternate character information.
- Find records using phonetic searching.
- Work with alternate character system architecture.

Understanding Alternate Characters

PeopleSoft HRMS uses related language table architecture to enable users to use multiple languages to enter data and to switch between a base language table and a related language table to view information in multiple languages. In addition, it uses alternate character system architecture to enable users to use two character sets for one language.

The alternate character system architecture accommodates languages (such as Chinese and Japanese) that require the entry of proper nouns by using two character sets to support phonetic sorting rather than binary sorting on proper nouns. For example, users who enter data in Japanese require functionality that enables them to enter proper nouns (such as names or descriptions) both in Kanji and by using a phonetic character set. To accomplish phonetic sorting in PeopleSoft HRMS, configure your system so that the user can enter Japanese proper nouns twice: once in Kanji and once (phonetically) using Katakana, Hiragana, or roman alphabets also known as Romaji.

Important! (*JPN*) In choosing which phonetic character set to adopt, it is important for customers to determine a consistent method for entering phonetic character set information. From a technical perspective, the system simply applies a binary sort method to phonetic characters. Thus, different characters with the same pronunciation aren't sorted together by their pronunciation in PeopleSoft HRMS. For example, a Hiragana *Ma* character is sorted before a Hiragana *Mi* character and after a Hiragana *Ho* character. If a Katakana *Ma* character is included in the sort, it is sorted after a Katakana *Mi* character and appears only after all the Hiragana characters are sorted.

(*CHN*) As Chinese government adopts an official method of romanizing Chinese characters, also known as Hanyu Pinyin, it is strongly advised to use Alphanumeric (roman alphabets) as the alternate character set.

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Understanding Alternate Character System Architecture

For certain names, addresses, and description fields in PeopleSoft HRMS, there is a corresponding alternate character field that is part of the record. This architecture enables the users to enter the same proper nouns using two character sets.

Alternate Character Fields Associated with Global Pages

The following table lists the alternate character fields and the global pages with which they are associated in PeopleSoft HRMS.

<i>Page</i>	<i>Auxiliary Page</i>	<i>Field</i>	<i>Comments</i>
BANK_BRANCH_EC		BRANCH_NAME_AC	
BANK_EC		BANK_NAME_AC	

<i>Page</i>	<i>Auxiliary Page</i>	<i>Field</i>	<i>Comments</i>
COMPANY_TABLE 1	COMPANY_ACDESCR_ SEC	DESCR_AC	
COMPANY_TABLE 1	COMPANY_ACADDR_S EC	COMPANY_ACADDR_S BP	COMPANY_TBL.CITY_ AC COMPANY_TBL.ADDR ESS1_AC COMPANY_TBL.ADDR ESS2_AC DERIVED_GBL.POSTAL _BTN ADDR_POS_JPN_SEC
DEPEND_BENEF1	DEPENDBN_ACNAME_ SEC	NAME_AC	
ESTAB_TBL1_GBL	ESTAB_ACDESCR_SEC	DESCR_AC	
ESTAB_TBL1_GBL	ESTAB_ACADDR_SEC	ESTAB_ACADDR_SBP	ESTAB_TBL.CITY_AC ESTAB_TBL.ADDRESS1 _AC ESTAB_TBL.ADDRESS2 _AC DERIVED_GBL.POSTAL _BTN
HS_NON_EMPL1	HS_NE_ACNAME_SEC	NAME_AC	
PERSONAL_DATA1 APP_PERSONAL_D ATA1	PERSDTA_ACADDR_SE C	PERSDTA_ACADDR_SB P	PERS_DATA_EFFDT.CI TY_AC PERS_DATA_EFFDT.AD DRESS1_AC PERS_DATA_EFFDT.AD DRESS2_AC DERIVED_GBL.POSTAL _BTN ADDR_POS_JPN_SEC
PERSONAL_DATA1 APP_PERSONAL_D ATA1	PERSDTA_ACNAME_S EC	NAME_AC	

<i>Page</i>	<i>Auxiliary Page</i>	<i>Field</i>	<i>Comments</i>
PYE_BANKACCT		ACCOUNT_NAME_AC	
SRC_BANK		ACCOUNT_NAME_AC	
STATE_NAMES_TBL	STATE_ACDESCR_SEC	DESCR_AC	
TRN_INSTRUCTR_TBL1	TRN_INS_ACNAME_SEC	NAME_AC	
NAMES	NAMES_ACPREFNM_SEC	NAME_AC	

Search Records with Alternate Character Name Fields

The following PeopleSoft HRMS search records that have NAME_AC (alternate character name) as an alternate search key or subrecords that are included in search records, enable for Japanese input and display:

- NAMES
- NAMES_SS_TMP
- NE_INCIDENT_SRCH
- NE_PERSONAL_DTA
- OPR_ROWS_EE
- OPR_ROWS_EE2
- PERSON_NAME
- PERS_SRCH_ALL
- PHYSICIAN_SRCH
- PHYSICIAN_SRCH2
- SHS_EMPL_TAO
- SHS_EXEMPT_TAO
- SSF_PERSON_VW
- SUCCESS_TR_SRCH
- TRN_DMNDDEE_SRCH
- TRN_INSTR_SRCH

- UPG_NAMES_TAO
- WCS_NAME_SCH_VW
- WF_PERSON_NAME
- WORKER_PROMPT

Note. This list includes only Human Resources system records.

PeopleSoft Human Resources Reports That Sort on Alternate Character Name

The following reports in PeopleSoft Enterprise Human Resources sort on the Name field or on the Alternate Character Name field when the system base language and the report language are configured as shown:

<i>Base Language Set To</i>	<i>Report Language Set To</i>	<i>Report Sorted By</i>
English	Japanese	BASE.NAME_AC
Japanese	Japanese	BASE.NAME_AC
English	English	BASE.NAME
Japanese	English	BASE.NAME

SQR/Crystal Reports

These SQR/Crystal reports are sorted phonetically for Japanese, based on the report and the base language configuration:

<i>Report ID</i>	<i>Description</i>
PER001	Department Action Notices
PER002	Employee Birthdays
PER004	Emergency Contacts
PER005	Employees on Leaves of Absence
PER007	Temporary Employees
PER009	Union Membership

Report ID	Description
PER011	Company Skills Inventory
PER012	Departmental Salaries
PER013	Employee Compensation Changes
PER020	Employee Home Address Listing
PER023	Salary History
CMP003	Compa-ratio Analysis by Grade and Job
CMP004	Below-Minimum Analysis
CMP005	Above-Maximum Analysis

Note. This list doesn't include country-specific regulatory reports that are sorted by Name.

Configuring Your System for Alternate Character Functionality

This section explains how to set up alternate character functionality in PeopleSoft HRMS.

To set up alternate character functionality in PeopleSoft HRMS:

1. Link the alternate character sets with language codes on the Installation Table - Alternate Character page (ALT_CHAR_TBL).

These settings affect your entire PeopleSoft HRMS installation.

Note. On this page, you define the alternate character set for the language that each user selects on the sign-on page.

2. Enable the alternate character functionality for specific user IDs on the Org Defaults by Permission Lst page (OPR_DEF_TBL_HR).

When you enable alternate character functionality for a user, the system displays the alternate character button to the right of all the fields on the Global menus that have an associated Alternate Character field.

When you click the Alternate Character button, the system opens a page where you enter or display the field value in the alternate character set.

Entering Alternate Character Information

On pages on the Global menus in PeopleSoft Human Resources, you can access the alternate character fields for proper noun fields like Name, City, and Company Description. To access these fields, click the Alternate Character button that appears to the right of a field that has a corresponding Alternate Character field available.

Note. (*CHN*),(*HKG*) and (*JPN*) On the Name page, when the Format for Country is *CHN*,*HKG* or *JPN*, the Name and the Alternate Character Name fields appear on the page: You can enter information in both fields directly on the Name page. On the Address page, click a button to access the alternate character secondary page. Whether the Alternate Character button appears on the Address page depends on the user ID's permission list and whether the particular page has Alternate Character functionality.

(*CHN*) When the Format for Country is *CHN*, the First Name and Last Name fields have values with alphanumeric characters, and you leave Alternate Character Name blank, the system populates Alternate Character Name using Last Name, space delimiter, and First Name. Please note that this functionality works only if Alternate Character Name has no existing value.

If you click the Alternate Character Address button in the Address History secondary page (ADDR_HISTORY_SEC), the system opens the Alternate Character Address page, such as the example that follows, where you can enter any proper noun information, such as street and city, in the designated alternate character set.

Alternate Character Type: Alphanumeric

Alternate Character Address

Prefecture:	Tokyo-To
AC City:	Shibuya-ku
AC Address 1:	Jinjumae
AC Address 2:	7-5-3
AC Address 3:	

Alternate Character Type page

Note. If you sign in to the application using a language for which you specified an alternate character type, the system displays that character type in the title bar of the Alternate Character Type page. In the example above, Alphanumeric is the alternate character type defined for English.

Once you enter alternate character information into an alternate character field and click OK to close the page, the system changes the appearance of the Alternate Character button on the page to indicate that alternate character information is available for the primary proper noun field on the main page.

Finding Records Using Phonetic Searching

PeopleSoft Human Resources provides several options for finding a person and updating or adding information to the people's records in the system. Even if you enter a person's name using ideograms such as Chinese characters and Japanese Kanji, you can specify the name phonetically as a search criterion.

For example, to look up Japanese employee Noriko Kawamoto's Personal Data record, place the cursor in the Alternate Character Name field, enter the Japanese phonetic characters for *Kawa*, and click OK. The list box on the search record page displays all the names (sorted phonetically) that begin with *Kawa* such as *Kawasaki*, *Kawashima* or *Kawamoto* in both Kanji and Kana.

Note. The phonetic value is the same as the base name value.ain

Chapter 9

Setting Up and Working with Currencies

This chapter provides an overview of currency and discusses how to:

- Run currency setup reports.
- Configure currency precision.
- View multiple currencies.
- View information about current exchange rate calculations.

Understanding Currency

If your organization operates in a global environment, your business tasks are probably global, too. You need to track personnel salaries and reimbursement amounts in multiple currencies, perhaps even multiple currency rate types, yet keep an eye on the bottom line by using one currency as a point of reference to track your expenses and costs worldwide.

Understanding currency in PeopleSoft is a two-part process:

- Understanding the mechanics of defining currency codes, types, exchange rates, and base currency, which are universal to HRMS.
- Understanding how some of the PeopleSoft HRMS applications use this information. For example, PeopleSoft Enterprise Global Payroll has extensive, application-specific currency functionality. For details of application-specific currency issues, see the application-specific documentation.

Note. Currency setup that is universal to PeopleSoft applications is discussed in another PeopleBook.

See Also

PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components, "Defining Currencies and Market Rates"

Configuring Currency Precision

This section provides an overview of currency precision and discusses how to:

- Activate currency precision.

- Report with currency precision.
- Expand a database for currency precision.

Understanding Currency Precision

According to the ISO standard, currency precision can range from no decimals to 3 decimals. For example, U.S. dollar amounts have 2 digits to the right of the decimal; Japanese yen have none. To support this dynamic currency precision, PeopleSoft delivers all of its currency-sensitive amount fields with a standard length of 13.2; that is, 13 digits to the left of the decimal and 2 digits to the right. Optionally, with some modification, you can expand these amount fields in your system to a maximum of 15.3 digits. There is a controlled currency on the same record to control the display and processing of such amount fields.

PeopleSoft rounds all currency-sensitive amount fields to the currency precision of the controlled currency during all online or background processes. For example, in a database containing amount fields with a length of 15.3, Japanese yen are rounded to 123.000 and U.S. dollars are rounded to 123.230. The system doesn't place a nonzero amount after the decimal for a Japanese amount or after the second digit to the right of the decimal for a U.S. amount.

PeopleSoft displays the amount fields on the online pages with the proper precision. For example, it displays Japanese yen as 123 and U.S. dollars as 123.23. When entering an amount, you can't enter more than the defined precision; if you do, the system treats the entry as an online error.

PeopleCode programs and background processes round all currency-sensitive amount fields to the currency precision of the controlled currency.

Activating Currency Precision

Currency precision is a PeopleTools option; selecting this option activates all of its features. With the option turned off, the system displays amount fields as defined in PeopleSoft Application Designer and rounds them to the number of decimals defined there.

Activate the PeopleTools multicurrency option on the PeopleTools Options page (PSOPTIONS) by selecting the Multi-Currency check box. PeopleTools will then use the precision you specify in the Currency Code page (CURRENCY_CD_TABLE) for the currencies relating to monetary fields for which you have specified currency control fields. Some PeopleSoft applications are shipped with the Multi-Currency check box selected. You can change that default.

Note. Once you deselect the Multi-Currency check box, selecting it again does not automatically round the existing transaction amounts. If you deselect the Multi-Currency check box, PeopleSoft supports only the default amount field size of 13.2. It does not support the larger amount field size of 15.3.

See Also

Enterprise PeopleTools PeopleBook: Data Administration Tools

Reporting with Currency Precision

Most PeopleSoft SQR reports display the currency-controlled amounts to the number of decimals that are defined by the associated currency. For example, a Japanese yen amount appears on a report as 123 and a U.S. dollar amount appears as 123.23.

For reporting with Crystal Reports and PS/nVision (Excel), the amount appears as a 2-decimal number. You have to modify the reports if you want to show 3 decimals on these reports.

Our third-party reporting tools don't fully support numeric fields that are greater than 15 digits. PS/nVision (Excel) uses an 8-byte float for numeric fields. This causes truncation after the fifteenth digit. Crystal Reports displays up to 16 digits correctly; for numbers that are greater than 16, Crystal Reports starts to insert nonsensical numbers into the decimal positions; however, this is a problem only with very large numbers. For any of these reporting tools, you should have accurate results up to the following amounts:

- Hundreds of trillions of yen (or lira): Precision = 0
- Trillions of dollars: Precision = 2
- Hundreds of billions of dinar: Precision = 3

For example, if you enter 2s into a 15.3 numeric database amount field, the following third-party reporting tools will display the value as:

<i>Number of Digits</i>	<i>Crystal Reports</i>	<i>PS/nVision (Excel)</i>	<i>SQR</i>
16	2,222,222,222,222.222	2,222,222,222,222.220	2,222,222,222,222.222
17	22,222,222,222,222.219	22,222,222,222,222.200	22,222,222,222,222.220
18	222,222,222,222,222.188	222,222,222,222,222.000	222,222,222,222,222.200

Expanding a Database for Currency Precision

With some PeopleSoft applications, you can expand your database from the original amount field size of 13.2 digits to 15.3 digits. For example, PeopleSoft supports the larger field size of 15.3 across the PeopleSoft Enterprise Financials, Distribution, and Manufacturing applications.

To expand your database:

1. Back up your database (optional).

Although this step is optional, we highly recommend it. This way, you can recover your database if you experience any database integrity problems during the remaining steps.

2. Run Audit scripts.

Run DDDAudit and SYSAudit from PeopleSoft Process Scheduler to ensure that the database is clean. Select PeopleTools, Process Scheduler, System Process Requests and enter a *Run Control ID*. Click Run. Specify the *Server* name of your environment, and select *DDDAUDIT* (and then *SYSAUDIT*) from the list of processes. Click OK to run the processes.

3. Review the script output to ensure a clean database.

Locate the DDDAudit and SYSAudit reports in your environment, and review them to ensure that the database is clean.

4. Run FSINTLFD.DMS to populate the international field size table.

Once the database is clean, run the script FSINTLFD.DMS to populate the international field size table INTL_FLDSIZ_TBL. Use DataMover to run this script. The system populates the international field size table with all the amount fields that have the controlled currency that is specified in Application Designer. The system calculates the new length by adding 2 digits to the left of the decimal and 1 digit to the right of the decimal. Before the system inserts new fields into the international field size table, it deletes all existing fields from the table.

5. Verify the results by reviewing the International Field Size page.

Select the International Field Size page. The Field Size - International column displays 15.3 for most of its fields. When compared with the Current Field Size, the values in the Field Size - International column should be 2 digits greater to the left of the decimal and 1 digit greater to the right of the decimal. In other words, a Current Field Size value of 13.2 should correspond to a 15.3 value in the Field Size - International column.

6. Run the PeopleTools process TLSINST1.SQR to change the field size on PSDBFIELD.

Note. This SQR is also an application engine. You can access it on the PeopleTools, Utilities, International, Process Field Size page.

Using SQRW, run PeopleTools SQR TLSINST1.SQR to change the field size on the PeopleTools table PSDBFIELD. This changes the PeopleTools definition values, but not the database field size.

It also creates a report (TLSINST1.LIS) that lists all the pages that use Average or Maximum size page fields. As a standard of PeopleSoft Enterprise, all monetary amount fields use a Custom field size to avoid the overlapping of fields when the amount fields are expanded. Review the list of pages and make any adjustments that are necessary to preserve readability.

7. Review SQR.LOG for errors.

The SQR log is created in C:\TEMP, unless otherwise specified. View the log to ensure that the field size value has been changed to 15.3. Verify the result by randomly checking the field size, opening the various records containing amount fields shown in step 5. As you build the project, executing scripts to SQL alter tables, creating views, and indexing, closely monitor the execution of the scripts and review the error log.

8. Use SQL Alter all tables.
 - a. Select PeopleTools, Application Designer, File, New, Project.
 - b. Select File, Save Project As.
 - c. Save the Project Name as *CURR_TBL*.
 - d. Select Insert, Objects into Project.
 - e. Select Object Type: Record and Type: Table.
 - f. Click Insert under Record Name. The system displays a list of all the tables being populated.
 - g. Click Select All, and click Insert again; click Close to close the page.
 - h. Select Build, Project.
 - i. In the Build Options group box, select Create Indexes and Alter Tables.
 - j. Under Build Execute Options, be sure that the *Build* script file is selected.
 - k. Review the script file with your database administrator (DBA), and execute the file using your recommended SQL query tool.
9. Use SQL Create all views.
 - a. Select PeopleTools, Application Designer, File, New, Project.
 - b. Select File, Save Project As. Save the Project Name as *CURR_VW*.
 - c. Select Insert, Objects into Project. Select Object Type: Record and Type: View/Query View.
 - d. Click Insert and then click Select All.
 - e. Click Insert again; then click Close to close the page.
 - f. Select Build, Project.
 - g. In the Build Options group box, select Create Views.
 - h. Under Build Execute Options, select the Build script file.
 - i. Review the script file with your DBA, and execute it using your recommended SQL query tool.
10. Run Audit scripts again.

Run DDDAudit and SYSAudit again to make sure that the database is clean.

11. Manually change reports.

PeopleSoft has enhanced most SQR reports to accommodate 15.3 amount fields. However, some of them are too crowded, and their amount field sizes remain 13.2. If the last digits of the decimals are important to you, update the SQR to 12.3 to display 3 decimals on the report. Following is a list of reports that require manual changes by application to accommodate the third digit of the decimal:

General Ledger	GLS1001, GLS1003, GLS7000, GLS7009, GLS7010, and GLS7012
Receivables	AR30001 (9.2), AR30002 (9.2), AR30003 (9.2), and AR30004 (12.2)

See Also

Enterprise PeopleTools PeopleBook: Global Technology

Viewing Multiple Currencies

To open the Display in Other Currency page, click the Display In Other Currency button on any page that supports multicurrency.

Many of the pages that display earnings or amounts in one currency enable you to view the amounts in another currency. This is an integral feature of the PeopleSoft Economic and Monetary Union (EMU) support and it enables you to view conversions across all currencies that are supported by the system.

Viewing Information About Current Exchange Rate Calculations

The Exchange Rate Detail page displays information about the current and historic exchange rates, the From currency, the To currency, and the Rate of exchange that you used in your currency conversion. Click Return to return to the Display In Other Currency page.

Running Currency Setup Reports

This section lists the pages used to run currency setup reports.

Pages Used to Run Currency Setup Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Currency Rate Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Rate Report, Run Control	Use this page to run the Currency Rate Table report (PER714) prints information about exchange rates.
Currency Code Table - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Code Table, Run Control	Use this page to run the Currency Code Table report (PER713) prints information about each currency defined in your Currency Code table.

Chapter 10

Setting Up and Working with Frequencies

This chapter provides overviews of frequency IDs, frequency for compensation conversions, frequency in PeopleSoft Enterprise Global Payroll, and frequency in PeopleSoft Enterprise Payroll for North America, and discusses how to define a frequency ID and country-specific defaults.

Understanding Frequency IDs

This section discusses:

- Frequency IDs.
- Frequency with compensation rates.
- Frequency with payroll calculations.

Frequency IDs

Frequency IDs are used in PeopleSoft Enterprise Human Resources, Global Payroll, and Payroll for North America. Frequency IDs are defined on the Frequency Table component (FREQUENCY_TBL). Each frequency ID has a frequency type and an associated annualization factor that represents the number of times that the period occurs in the course of a year.

In PeopleSoft HRMS, you use frequency IDs to define the periods of time in which compensation is quoted, standard hours are completed, and people are paid, to list a few examples.

PeopleSoft delivers a set of standard frequencies that are PeopleSoft-maintained. You can define additional, customer-maintained frequencies for nonstandard periods. For example, you could define a monthly-type frequency with a nonstandard annualization factor of 13 to represent 13 monthly periods in a year

PeopleSoft-Maintained Frequencies

PeopleSoft delivers and maintains the following frequency IDs in the Frequency Table component:

<i>Frequency ID</i>	<i>Description</i>	<i>Frequency Type</i>	<i>Annualization Factor</i>
A	Annual	Annual	1
B	Biweekly	Biweekly	26

<i>Frequency ID</i>	<i>Description</i>	<i>Frequency Type</i>	<i>Annualization Factor</i>
BMX30	Biweekly Mexico Factor 30.0	Biweekly	25.7142857
BMX34	Biweekly Mexico Factor 30.4	Biweekly	26.0571428
C	Contract	Contract	1
D	Daily	Daily	260
D365	Diario 365 dias	Daily	365
D426	Daily 14 Payments	Daily	426
DAR30	Daily Argentina Facto 30.0	Daily	360
DMX30	Daily Mexico Factor 30.0	Daily	360
DMX34	Daily Mexico Factor 30.4	Daily	364.8
F	Every four weeks	Every four weeks	13
H	Hourly	Hourly	Use Standard Hours for Annualization
HMX30	Hourly Mexico Factor 30.0	Hourly	2880
HMX34	Hourly Mexico Factor 30.4	Hourly	2918.4008
JM	Japan Monthly	Monthly	12
M	Monthly	Monthly	12
M13	Monthly 13 payments	Monthly	13

<i>Frequency ID</i>	<i>Description</i>	<i>Frequency Type</i>	<i>Annualization Factor</i>
M14	Monthly 14 payments	Monthly	14
Q	Quarterly	Quarterly	4
S	Semimonthly	Semimonthly	24
SMX34	Semimonthly Mexico Factor 30.4	Semimonthly	24.32
W	Weekly	Weekly	52
WMX30	Weekly Mexico Factor 30.0	Weekly	51.4285714
WMX34	Weekly Mexico Factor 30.4	Weekly	52.1142857

Frequency with Compensation Rates

When you associate frequency with compensation rates, you define the time period on which the compensation is based. For example, you might state a worker's base salary as 60,000 a year (annual frequency) or 5,000 a month (monthly frequency). When you associate these compensation rates with jobs, positions, salary steps, or individual job records, the system uses the annualization factor that is associated with this frequency to convert the compensation to other frequencies.

When you set up PeopleSoft Human Resources, you can define default compensation frequencies at several levels. You can usually change that default value when the system enters it into other pages.

This table lists important pages on which compensation frequencies are either specified or used:

<i>Component or Page</i>	<i>Default Compensation Frequency Value</i>
Default Frequencies page (DFLT_FREQUENCY)	Specify default frequencies for each country and specify the order in which the system uses them to display base pay compensation in the Pay Rates group box on the Compensation page of the Job Data component.
Compensation page (JOB_DATA3) of the Job Data component (JOB_DATA)	Displays base pay compensation information in the frequencies that are specified for the country on the Default Frequencies page

Component or Page	Default Compensation Frequency Value
HRMS Options page (INSTALLATION_TBL1B) of Installation Table component (INSTALLATION_TBL)	Set a default compensation frequency and a default work period for your organization. The system enters these default values in the Job Code table.
Job Code Profile page (JOB_CODE_TBL1_GBL) of Job Code component (JOB_CODE_TBL)	Default compensation frequency and default work period values are taken from the Installation table.
Comp Rate Code Table component (COMP_RATECD_TBL)	Specify rate code frequencies on the Comp Rate Code table. The system enters these default values when you select the rate code in a pay components group box (found on a number of pages in PeopleSoft HRMS). You can also specify here whether the FTE (full-time equivalency) calculation should be applied to the compensation associated with the rate code.
Define Salary Plan component (SALARY_PLAN_TABLE)	Specify default frequency for components of pay assigned to salary steps.
Pay Group Table component (PAYGROUP_TABLE)	Specify daily and monthly frequencies for the pay group . The system uses the frequency information to calculate pay rates.

See Also

[Chapter 13, "Setting Up Jobs," Classifying Jobs, page 334](#)

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Setting Up Rate Codes

Frequency with Payroll Calculations

Global Payroll and Payroll for North America use frequency to define how often certain events happen.

Global Payroll uses frequency IDs when defining elements, generation control parameters, calendar periods, rate code elements, and system elements. In addition to using frequency defined on the Frequency Table page, Global Payroll also uses frequency defined on the Generation Control Frequency page (GP_GCTL_FREQUENCY).

Payroll for North America uses frequency IDs to define pay period frequency and to calculate pay rates and proration of pay.

See Also

[Chapter 10, "Setting Up and Working with Frequencies," Understanding Frequency in Global Payroll, page 218](#)

[Chapter 10, "Setting Up and Working with Frequencies," Understanding Frequency in Payroll for North America, page 222](#)

Understanding Frequency in Compensation Rate Conversions

This section discusses:

- Factors applied to the compensation rate.
- Conversion of compensation rates to different frequencies.
- Job Data pay rate frequencies.

Factors Applied to the Compensation Rate

PeopleSoft HRMS calculates and displays compensation rates in the hourly, daily, weekly, monthly, and other frequencies using standard frequency conversion formulas. Depending on the frequency being converted, the system performs the calculations by applying one or more of the following to the compensation rate:

- Compensation frequency annualization factor.
- Job standard hours.
- Standard work period frequency annualization factor.
- FTE (full-time equivalency) factor.

Frequency Annualization Factor

Each frequency ID has an associated annualization factor that represents the number of times that the period occurs in the course of a year.

See [Chapter 10, "Setting Up and Working with Frequencies," Frequency IDs, page 209](#).

Standard Hours and the Standard Work Period

When converting hourly compensation rates, the frequency conversion calculations use the job standard hours and the standard work period. Job standard hours define how many hours the worker should work in the job. The standard work period defines the work period in which the standard hours should be completed. You define the standard work period by selecting a frequency ID (and its annualization factor) as defined on the Frequency Table component.

You define the standard hours and the standard work period on the following pages:

Component	Page	Assignment Level
Installation Table	HRMS Options	Values for an organization
Org Defaults by Permission Lst (OPR_DEF_TBL_HR)	Settings (OPR_DEF_TBL_HR2)	Values for a primary permission list
Position Data (POSITION_DATA)	Description (POSITION_DATA1)	Values for a position
Define Salary Plan	Salary Plan Table (SALARY_PLAN_TABLE)	Values for a salary plan
Job Code	Job Code Profile	Values for a job code
Job Data	Job Information (JOB_DATA_JOBCODE)	Values for an employee
Job Openings (HRS_JOB_OPENING)	Job Opening (HRS_JOB_OPENING)	Values for an employment application

The minimum and maximum standard hours values and the standard work period defined on the Business Unit HR Defaults page (BUS_UNIT_OPT_HR) are used for validation edits in the Job Data and Position Data components.

Defaults for Standard Hours and Standard Work Period

The system inserts the standard hours and the standard work period as default information only if both are defined. The following table describes the source of defaults in Job data under the specified conditions:

Condition	Default Source
You assign the worker a salary plan.	Salary Plan Table page
You assign the worker to a position.	Description page of the Position Data component
You assign the worker a job code.	Job Code Profile page of the Job Code component
You didn't indicate standard hours on the Salary Plan table, Job Code table, or Position Data table.	HRMS Options page of the Installation component

Full-Time Equivalency

Full-time equivalency (FTE) is the percentage of full time that a worker should normally work in a job. In calculating the FTE, the system uses your definition of the standard hours and the standard work period.

If you select *Apply FTE* for a compensation component, PeopleSoft Human Resources uses the standard hours and the standard work period to compute FTE to prorate holiday hours and pay for part-time and hourly workers.

Note. (FRA) For workers in French regulatory regions, the system uses the PAID_FTE field to prorate holiday hours and pay for part-time and hourly workers.

PeopleSoft Human Resources calculates FTE using the product of the standard hours of the job multiplied by the annualization factor of the job's standard work period which is then divided by the product of the default standard hours multiplied by the annualization factor of the default full time standard hours work period, as shown in this equation:

$$FTE = \frac{(\text{Job Std Hrs}) \times (\text{Annualization Factor of Job Std. Work Period})}{(\text{Default Full Time Std. Hrs}) \times (\text{Annualization Factor of Default Full Time Std. Work Period})}$$

FTE Equation

In this equation, the default full-time standard hours and default full-time standard work period are from:

- The Salary Plan component (if a salary plan is defined for the worker, and if both standard hours and standard work period are defined for this salary plan).
- The Org Defaults by Permission Lst component (if no salary plan is defined for the worker, and if both standard hours and standard work period are defined in the Org Defaults by Permission Lst component).

Conversion of Compensation Rates to Different Frequencies

The system converts compensation rates to daily, monthly, and other frequencies using standard formulas. The formula for converting to or from an hourly rate takes the standard hours and standard work period into account.

The system performs compensation rate conversions as follows:

1. Finds or calculates the annual rate for compensation.
2. Divides the annual rate using de-annualization conversion calculations to calculate the rate at the desired frequency.
3. Multiplies the converted compensation rate by the FTE factor if Apply FTE is selected for the pay component.

Note. (FRA) For workers in French regulatory regions, the system uses the PAID_FTE field to multiply the converted compensation rate.

Annualized Rate Calculations

The system uses the following formulas to convert compensation rates to an annual frequency:

<i>Original Frequency</i>	<i>Formula for Conversion to Annual Frequency</i>
Hourly	Annual Rate = Comprate × Job Standard Hours × Frequency Annualization Factor of Standard Work Period
Monthly, daily, and other	Annual Rate = Comprate × Frequency Annualization Factor

De-Annualized Rate Calculations

The system uses the following formulas to convert compensation rates from an annual frequency to another frequency:

Non-Annual Frequency	Formula for Conversion from Annual Frequency
Hourly	Hourly Rate = Comprate / (Job Standard Hours × Frequency Annualization Factor of Standard Work Period)
Monthly, daily, and other	Non-Annual Rate = Annual Comprate / Frequency Annualization Factor

The following examples illustrate the use of these formulas.

Example of Hourly to Monthly Compensation Rate Conversion

Teresa Johnson has the following job data information:

Employment Variables	Values
Comprate (hourly)	10
Job Standard Hours	35
Frequency Annualization Factor of Standard Work Period	52
Frequency Annualization Factor of Month	12

The following table shows how the system calculates Teresa Johnson's monthly FTE (full-time equivalency) compensation rate. The total represents Teresa's monthly salary based on a thirty-five hour workweek over a fifty-two week year.

Rate	Equation
Annual	$10 \times 35 \times 52 = 18,200$
Monthly	Annualized Comprate / Frequency Annualization Factor of Month $18,200 / 12 = 1516.67$

Example of Monthly to Biweekly Compensation Rate Conversion

Bill McKenny has the following job data information:

Employment Variables	Value
Comprate (monthly)	2000
Frequency Annualization Factor of Monthly	12
Frequency Annualization Factor of Biweekly	26
Apply FTE Selected	Yes
FTE Factor	0.95

The following table shows how the system calculates Bill McKenny's biweekly compensation rate:

Rate	Equation
Annual	Comprate $\times$ Frequency Annualization Factor of Month 2000 $\times$ 12 = 24,000
De-annualize	Annualized Comprate / Frequency Annualization Factor of Biweekly 24,000 / 26 = 923.08
Multiply by FTE	923.08 $\times$ 0.95 = 876.85

Job Data Pay Rate Frequencies

The system uses the country-specific default frequencies to calculate and display the pay rates in the Pay Rates group box on the Job Data - Compensation page. The system finds the frequencies that are associated with the person's country on the Default Frequencies table. The order you list the frequencies on this table is the order in which the pay rates appear in the Pay Rates group box. The system converts compensation rates to the default frequencies using the standard formulas described in this chapter.

Because the PeopleSoft Global Payroll and Payroll for North America systems calculate daily and monthly pay rates using frequencies established for the pay group, it is possible that the compensation rates displayed on the Job Data - Compensation page will vary from the pay rates calculated with pay group daily and monthly frequencies. This would occur if the pay group daily or monthly frequency differs from the daily or monthly frequency specified for the country on the Default Frequency page. It is recommended that you establish pay group frequencies to match the default frequencies for the country whenever possible.

The pay rates calculated with pay group frequencies are available on the JOB record in the fields JOB.ANNUAL_RT, JOB.MONTHLY_RT, JOB.DAILY_RT, JOB.HOURLY_RT. These fields are referenced by the Job Summary page and can be referenced in PS Query.

See Also

Chapter 10, "Setting Up and Working with Frequencies," Setting Country-Specific Frequency Defaults, page 227

Understanding Frequency in Global Payroll

PeopleSoft Global Payroll uses frequency when defining elements, generation control parameters, calendar periods, rate code elements, and system elements. In addition to using frequency defined on the Frequency Table page, PeopleSoft Global Payroll also uses frequency defined on the Generation Control Frequency component.

This section discusses:

- Frequency with element definitions.
- Frequency with generation control.
- Frequency with calendar periods.
- Frequency with rate codes and system elements.

Frequency with Element Definitions

An *element* is the smallest component of PeopleSoft Global Payroll, and it is used in defining calculation rules to process your payroll. Elements can hold the values of pay (earnings), an amount to be deducted from pay (deduction), or time away from work (absence).

Elements (such as earnings, deduction, and absence) can be standalone. Supporting elements (such as rate codes or rounding rules) can be used with other elements to define a calculation rule. Each element is defined only once, but it can be used repeatedly.

For any earnings, deduction, or absence element, you must specify the frequency of the stated amount on the Earning/Deduction definition. For each item that you associate with a frequency, you must consider how the frequency fits into the overall processing picture. Selecting the correct frequency for earnings, deductions, and absence elements is essential for correct processing. For example:

Earnings element	In what frequency is the stated amount paid? Is it per week, per month, or per year?
Deduction element	In what frequency is the stated amount withheld? Is the stated amount the amount to withhold each pay period, each month, or for the entire year?
Absence element	Is an employee entitled to three days of holiday time per month or per year?

In PeopleSoft Global Payroll, you use frequency to define earnings, deduction, or absence elements.

To illustrate, we refer to defining an earnings element. However, the process is the same for earnings, deduction, and absence elements.

You define the calculation rule, frequency, and generation control for an earnings element on the Earnings - Calculation page (GP_ERN_DED_CALC).

See *PeopleSoft Enterprise Global Payroll 9.1 PeopleBook*, "Defining Earning and Deduction Elements," Defining Calculation Rules for an Earning Element.

Select a calculation rule and once you select a calculation rule, you must further define details for each component of the rule. For example, if you select Amount, specify the amount of the earnings element.

The following table lists the calculation rules and the components of the calculation rule for which frequency conversion is performed:

Calculation Rule	Component
Amount	Amount (if necessary)
Rate × Unit	Unit
Rate × Unit × Percentage	Unit
Base × Percentage	Base

Define the frequency that the stated amount represents. If you select Use Calendar Frequency, the system uses the frequency that's defined for the calendar period on the Define Calendars - Period page (GP_CALENDAR_PERIOD). If you select Use Specified Frequency, you can define your frequency directly on the Earnings - Calculation page by selecting from a list of frequencies.

See *PeopleSoft Enterprise Global Payroll 9.1 PeopleBook*, "Using Calendars," Creating Periods.

The Frequency field enables you to tell the system the frequency with which you are stating a value. For example, let's say that you select Use Specified Frequency, that you have a weekly payroll, and you create an earnings element with an amount of 100 and a frequency of *Monthly*. If you don't have any generation control conditions defined, the system annualizes and de-annualizes the amount into a processing frequency amount. Let's assume that you define your organization's monthly frequency as 12 and the weekly frequency as 52. The system takes the 100 (monthly amount) and annualizes it to 1200. Next, it takes this annualized amount and de-annualizes it into the payroll processing frequency (weekly, in this example). The amount paid each pay period is:

$$1200 / 52 = 23.08$$

The benefit of defining a frequency is that if your organization has multiple pay frequencies (such as weekly, semimonthly, and monthly), you don't have to create separate earnings for each frequency. The system automatically converts the amount into the corresponding pay period amount. Let's say that your organization decides to give an annual bonus of 1000 to all payees and this bonus is distributed throughout the year. Your hourly payees get paid weekly and your salaried payees get paid monthly. If you define an earnings bonus as *BON = 1000*, with a frequency of Annual, you can apply this earnings definition to payees who are paid weekly and payees who are paid monthly by using annualization and de-annualization. The frequency assigned on the Earnings Calculation page calculates the bonus amount correctly, regardless of the pay frequency.

Note. In PeopleSoft Global Payroll, there is no distinction between organizational relationships (employee, contingent worker, or person of interest). Because payroll is processed for all types of people with jobs, the PeopleSoft Global Payroll documentation refers to both of them as *payees*.

Frequency with Generation Control

Pay period frequency isn't hard-coded into the system. Instead, PeopleSoft Global Payroll uses the HR Frequency Table component to determine how a frequency is calculated. For example, a monthly frequency has a factor of 12 and a weekly frequency has a factor of 52. Frequencies that are defined on the Frequency Table page are easily used wherever you use frequency in the system.

PeopleSoft Global Payroll provides an additional generation control concept called "Generation Control Frequency" to help control the pay periods in which a specific earning or deduction is to be resolved (such as only the first pay period of a month, and so on). Generation control frequencies enable you to define meaningful names and associate the correct frequency ID with a pay period.

An example of a frequency that isn't on the HR Frequency Table is First of the Month. Let's say that you have a weekly pay frequency, but you want an earnings element to be paid only on the first pay period of the month. In PeopleSoft Human Resources, the frequency would be monthly. This might not work for your payroll purposes. So, in PeopleSoft Global Payroll, the earnings element would be defined (tagged) as *First of the Month* and paid only on the first pay period of the month.

The Generation Control Frequency component is part of generation control frequency processing.

Generation control enables you to tell the system, through various control methods, when to process an element. For example, if an earnings element is to be paid only on the first pay period of the month (for weekly payrolls), you can control the payroll so that this earning is only paid in Week 1, and not paid in the subsequent week's payrolls during the month:

- First you define generation control ID parameters on the Generation Control - Conditions page (GP_GCTL_CONDITION).

See *PeopleSoft Enterprise Global Payroll 9.1 PeopleBook*, "Defining Calculation Elements," Naming Generation Control Elements.

- Next, when you define an earnings element, you prompt against this table by selecting a generation control name on the Earnings - Calculation page.
- Then you don't have to redefine the parameters for each earnings element.

If you leave the Generation Control field blank on the Earnings - Calculation page, the system assumes to be paid every time based on normal eligibility rules for the payee.

Note. If the frequency that you select is other than *Use Calendar Period Frequency*, the system de-annualizes the earnings amount based on the pay period frequency. If a generation control frequency exists, the system de-annualizes the earnings amount based on that frequency. The generation control frequency overrides the pay period frequency during frequency conversion. For example, let's say that you have an earnings element with an amount of 1200, an annual frequency, and a monthly pay period. If your organization's monthly frequency is defined as 12, and you don't have a generation control frequency for this earnings, the amount is de-annualized to 100 per month ($1200 / 12 = 100$). If you have a generation control frequency for this earnings element, the amount is different. Let's say that you have defined a generation control frequency of quarterly. The earnings are de-annualized to 300 ($1200 / 4 = 300$).

PeopleSoft Global Payroll delivers four predefined generation control frequencies: *1st Month*, *Annual*, *January*, and *Quarter*. All generation control frequencies can be used in corresponding generation control elements.

Using Frequency with Calendar Periods

Use frequency with calendar periods when defining the frequency that's being processed.

When processing a payroll or absence run in PeopleSoft Global Payroll, you must tell the system the time period to calculate. This is often referred to as the pay period. You define period selection criteria by defining a period ID on the Define Calendars - Period page.

See *PeopleSoft Enterprise Global Payroll 9.1 PeopleBook*, "Using Calendars," Creating Periods.

The period ID defines the start date, end date, and frequency of a particular pay period. This definition is kept separate from the pay calendar to make it easy to reuse and to provide optimum flexibility during processing.

Here are some examples of the time and frequency data that can be defined by a period ID:

<i>Begin Date</i>	<i>End Date</i>	<i>Frequency</i>
June 1	June 7	Weekly
June 1	June 30	Monthly
June 1	June 15	Semimonthly
June 1	August 31	Quarterly

On the Define Calendars - Period page, the frequency is defined for de-annualization when an earnings, deduction, or absence element is defined without generation control frequency. However, if generation control frequency is included (in the earnings, deduction, or absence element definition), and the element generation control and the calendar ID generation control match, the system uses this generation control frequency for the de-annualization factor.

Examples of Frequencies

This table provides some examples of frequencies:

<i>Frequency</i>	<i>Element 1</i>	<i>Element 2a</i>	<i>Element 2b</i>	<i>Element 3</i>
Amount	1,200	1,200	1,200	1,200
Frequency (Element Definition)	Monthly (12)	Monthly (12)	Monthly (12)	Monthly (12)

<i>Frequency</i>	<i>Element 1</i>	<i>Element 2a</i>	<i>Element 2b</i>	<i>Element 3</i>
Generation Control Frequency	None	Monthly (12)	Monthly (12)	Semimonthly (24)
Pay Period Frequency	Semimonthly (24)	Semimonthly (24)	Semimonthly (24)	Semimonthly (24) *
Calendar Generation Control Frequency	None	Monthly (12)	None	Semimonthly (24) *
Calculated Amount	600	1200	Not resolved	600

You don't need to specify the associated frequency if it coincides with the pay period frequency.

See [Chapter 10, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 217.](#)

Using Frequency with Rate Codes and System Elements

When you define an earnings or deduction element that uses either a rate code or a frequency-controlled system element, the earnings or deduction element should always have the frequency Use Calendar Period Frequency. System elements are delivered and maintained by PeopleSoft.

A system element that is frequency-controlled resolves in the calendar frequency portion of payroll processing, according to the frequency that is specified for the element when it is set up. The system then de-annualizes by the calendar frequency.

Understanding Frequency in Payroll for North America

This section discusses:

- Compensation frequency and pay frequency.
- Examples of pay rate calculations.
- Proration of compensation rates.
- Exceptions to Frequency table use.

Compensation Frequency and Pay Frequency

In Payroll for North America you use the frequencies on the Frequency Table component to specify pay period frequency on the Pay Group component. The system uses compensation and pay frequencies for the calculation and proration of pay rates during batch and online system processes.

See Also

Chapter 10, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 217

Examples of Pay Rate Calculations

This section provides examples of how the system uses compensation rates and frequencies and pay period frequency to calculate pay rates.

Example: Biweekly Pay Period Calculation of Monthly Compensation

This example illustrates how Payroll for North America calculates the pay period rate by annualizing monthly compensation using the following frequencies:

<i>Description</i>	<i>Frequency ID</i>	<i>Frequency Type</i>	<i>Frequency Annualization Factor</i>
Pay frequency (Pay Group table)	B1	B (biweekly)	26.1
Compensation frequency (employee's Job data setup)	M	M (monthly)	12

Using a compensation rate of 1,000 USD, the calculations of the annual compensation rate and pay period compensation rate are:

- Annual Rate = Comprate $\times$ Compensation Frequency Factor
 $12,000.00 = 1,000.00 \times 12$
- Pay Period (Biweekly) Rate = (Annual Rate) / Pay Frequency Factor
 $459.77 = 12,000.00 / 26.1$

Example: Weekly Pay Period Calculation of Hourly Compensation

Payroll for North America uses the annualization factor of the standard work period frequency in combination with the standard hours to calculate pay rates or proration of hourly compensation.

This example illustrates how Payroll for North America calculates the weekly pay period rate of hourly compensation.

The pay group's pay period frequency definition is:

<i>Description</i>	<i>Frequency ID</i>	<i>Frequency Type</i>	<i>Frequency Annualization Factor</i>
Pay frequency (Pay Group table)	W (weekly)	W (weekly)	52

The employee's compensation frequency definition is:

<i>Comp Rate</i>	<i>Comp Frequency</i>	<i>Standard Hours</i>	<i>Annualization Factor of Std Work Period</i>
10.00	H (hourly)	40.00	52

The calculations of the annual compensation rate and pay period compensation rate are:

- Annual Rate = Comprate $\times$ (Standard Hours $\times$ Standard Work Period Annualization Factor)
 $20,800.00 = 10 \times 40 \times 52$
- Pay Period (weekly) Rate = Annual Rate / Pay Frequency Factor
 $400 = 20,800.00 / 52$

Proration of Pay Rates

The system calculates proration for partial periods when events such as new-hires, terminations, or pay rate changes occur in the middle of a pay period. It uses data that you specify on the Pay Group component in conjunction with compensation data to calculate proration.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "Setting Up Pay Groups," Understanding Proration Rules.

Exceptions to Frequency Table Use

Some processes, such as deduction calculations and Canadian tax calculations, use the pay periods per year from the Pay Calendar Table page (PAY_CALENDAR_TABLE). The value in the Pay Periods Per Year field on the Pay Calendar Table page is derived from the pay frequency of the pay group.

See Also

[Chapter 19, "Setting Up Pay Calendars," Creating Pay Calendars and FLSA Calendars, page 487](#)

[Chapter 13, "Setting Up Jobs," Setting Up Pay Groups, page 356](#)

Defining a Frequency ID and Country-Specific Defaults

To define a frequency ID and country-specific defaults, use the Frequency Table component (FREQUENCY_TBL) and the Default Frequencies by Country component (DFLT_FREQUENCY).

This section discusses how to:

- Define a frequency ID, type, and annualization factor.
- Set country-specific frequency defaults.

Pages Used to Define a Frequency ID and Country-Specific Defaults

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Frequency Table	FREQUENCY_TBL	Set Up HRMS, Foundation Tables, Compensation Rules, Frequency Table, Frequency Table	Define a frequency ID, its frequency type, and its annualization factor.
Default Frequencies by Country	DEFLT_FREQUENCY	Set Up HRMS, Foundation Tables, Compensation Rules, Default Frequencies By Country, Default Frequencies by Country	Specify country-specific default frequencies by country.

Defining a Frequency ID, Type, and Annualization Factor.

Access the Frequency Table page (Set Up HRMS, Foundation Tables, Compensation Rules, Frequency Table, Frequency Table).

Frequency Table

Frequency ID: D

Frequency Information
Find | View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Description: Daily

Short Description: Daily

Maintenance Responsibility: P PeopleSoft

Frequency Type: Daily

☐ Use Standard Hours for Annualization

Frequency Annualization Factor: 260.0000000

Frequency Table page

Maintenance Responsibility

Select a maintenance responsibility. Values are:

- *C (customer)*: You define the frequency ID. You are responsible for keeping this frequency code up to date.
- *P (PeopleSoft)*: PeopleSoft delivers the frequency in the system and is responsible for keeping it up to date. The other fields on this page become unavailable.

Frequency Type

Select a frequency type. Values are:

- *Annual*
- *Biweekly*
- *Contract*
- *Daily*
- *Every Four Week*
- *Hourly* The Use Standard Hours for Annualization check box becomes available.
- *Monthly*
- *Quarterly*
- *Semimonthly*
- *Weekly*

Use Standard Hours for Annualization

Select to have the system use job standard hours for annualization instead of the frequency annualization factor. The frequency annualization factor is set to 0, and that field becomes unavailable.

Note. You can use only hourly frequencies that use standard hours for annualization for compensation and pay frequency in PeopleSoft Human Resources, PeopleSoft Payroll for North America, and PeopleSoft Global Payroll.

Frequency Annualization Factor

Defines how many frequency periods occur in one year.

Examples:

- A standard daily compensation frequency is 260 because there are 260 workdays in a standard year.
- You can define a frequency called W53 with a W (weekly) frequency type and an annualization factor of 53.

Important! If you change the effective status, frequency type, or annualization factor of an existing frequency, you receive a warning message saying that previous calculations using this frequency aren't synchronous with the new values of the frequency.

Setting Country-Specific Frequency Defaults

Access the Default Frequencies by Country page (Set Up HRMS, Foundation Tables, Compensation Rules, Default Frequencies By Country, Default Frequencies by Country).

Default Frequencies by Country

Country: CAN Canada

Frequency to display on Job

1st Frequency:	A		Annual
2nd Frequency:	M		Monthly
3rd Frequency:	D		Daily
4th Frequency:	H		Hourly

Default Frequencies by Country page

Select four frequencies to set as defaults for the specified country. The system uses these default frequencies to calculate pay rates in the Pay Rates group box on the Job Data - Compensation page. The order you list the frequencies on this page is the order in which the pay rates appear in the Pay Rates group box.

For example, you specify the 1st Frequency as annual, 2nd Frequency as monthly, 3rd Frequency as daily, and 4th Frequency as hourly for Canada. For an employee in Canada, the Pay Rates group box displays the following pay rates in this order: annual, monthly, daily, and hourly. The system converts compensation rates to the default frequencies using the standard formulas described earlier in this chapter.

See Also

Chapter 10, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies, page 217

Chapter 11

Setting Up Organization Foundation Tables

This chapter provides an overview of enterprise integration points and discusses how to:

- Set up person of interest types.
- Set up holiday schedules.
- Define business units.
- Enter company information.
- (USF) Enter agency information.
- Define legal types.
- Define establishments.
- Establish locations.
- Establish military locations.
- (USF) Establish federal locations.
- Set up company locations.
- Maintain departments.
- (USF) Set up federal departments.
- Set up primary permission list preferences.

Setting Up Person of Interest Types

To set up person of interest types, use the Person of Interest Types (POI_TYPE_TBL) component.

This section provides an overview of POI types and discusses how to set up new POI types and activate delivered POI types.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," Organizational Relationships

Understanding POI Types

PeopleSoft enables you to track information for people of interest (POIs), people who do not make up a part of your workforce but who are still of interest to the organization. Different POI types are used in different areas of your organization. For example, PeopleSoft Enterprise Global Payroll uses the Global Payroll Payee POI type, whereas the External Trainee POI type may be used by PeopleSoft Enterprise Recruiting Solutions for applicants who require training prior to being hired and PeopleSoft Enterprise Campus Solutions.

You select a POI type on three components:

- Add a Person component (PERSON_DATA_ADD)
- Job Data component (JOB_DATA)
- Person Organizational Summary component (PERSON_ORG_SUMM)

The generic components are on the Workforce Administration menu but these components are also available on different application menus throughout the system. When you set up or modify a POI type, you can limit the components on which the POI type can be selected by menu. For example, you could create a new recruiting POI type that is only available on the components on the Recruiting menu or you could make the Pension Payee POI type, which is delivered as an option only on the Pension Administration menu, available on the Administer Workforce menu components, too.

Page Used to Set Up Person of Interest Types

Page Name	Definition Name	Navigation	Usage
Person of Interest Types	POI_TYPE_TBL	Set Up HRMS, Foundation Tables, Organization, Person of Interest Types, Person of Interest Types	Review the delivered POI types and modify the characteristics that govern how the system processes the information of POIs with this type.

Defining POI Types

Access the Person of Interest Types page (Set Up HRMS, Foundation Tables, Organization, Person of Interest Types, Person of Interest Types).

Person of Interest Types

Person of Interest Type: 00007 ***Effective Status:** Active

***Description:** External Trainee

***Short Description:** Ext Stud.

☐ **Job Record Required?**

POI Transaction

Record for POI Transaction: PER_POI_TRANS

Component Name: TRN_INSTRUCTR_TBL1

Market: GBL

Menu Name: ADMINISTER_TRAINING_(GBL)

Menu Bar Name: USE

Menu Item Name: PERSONAL_DATA

Transfer Panel Name: PERSONAL_DATA1

Usage of this POI Type

Record for POI Summary View: POI_TRN1_VW

Person of Interest Checklist: HCPOI

☒ **Allow in Generic Add Component**

☒ **Allow in Generic Upd Component**

Comments
 Used by the HR product in the Training Administration Module. This relationship can be created in the Training Module, the Administer Workforce Add POI Relationship component, and also via Recruit Workforce for people who need training prior to being hired.

Person of Interest Types page

Effective Status Inactivate any system delivered POI types that you will not be using so that they do not appear as options on HRMS transaction components.

Job Record Required? Select if this POI type requires a POI job record.

When you select this check box for a new POI type, the system enters default information into the POI Transaction group box that you cannot overwrite.

POI Transaction

Record for POI Transaction

Select the record used for processing and holding information about people with this POI type.

If you select the PER_POI_TRANS record (the generic POI transaction record used by the Person Organization Summary component), the system enters default information into the rest of the fields in the POI Transaction group box and the Record for POI Summary View field that you cannot overwrite.

If you choose to use a record other than PER_POI_TRANS for POI types that do not require jobs, you will need to create a view to use in the Record for POI Summary View field in order for the data in the transaction record to show up in the Person Organizational Summary component.

Component Name

Select the component using the POI transaction record. When you select this POI type on the Personal Data – Organizational Relationships page and click the Add the Relationship button, the system will move you to the component you select here.

Market, Menu Name, Menu Bar Name, and Menu Item Name

Select the menu's market, name, bar name, and item name for the selected component.

Transfer Panel Name

Enter the object name of the page you want the system to open to when you click the Add the Relationship button.

Usage of this POI Type

Record for POI Summary View

Select the record from which the system draws the summary information for this POI type. When you view the organizational relationships of a person with this POI type on the Person Organizational Summary component, the system pulls the summary information from this record.

If you choose to use a record other than PER_POI_TRANS, you must create a view to use here in order for the data in the transaction record to show up in the Person Organizational Summary component. Create the view in PeopleSoft Application Designer using the PER_POI_TRANS view but with different view text.

Person of Interest Checklist

Select a default checklist for this POI type. When you opt to assign a POI type to a person and create a POI checklist from the Personal Data - Organizational Relationships page (PERSONAL_DATA4), the system creates a record for the person on the Person Checklist page (PERSON_CHECKLIST) and adds this checklist.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Creating Checklists.

Allow in Generic Add Component	Select to make this POI type available when adding a record for a POI in the Add a Person component, Job Data component, and Person Organizational Summary component on the Administer Workforce menu. The system selects this check box for all new types.
Allow in Generic Upd Component (allow in generic update component)	Select to make this POI type available when updating a record for a POI in the Job Data component and Person Organizational Summary component on the Administer Workforce menu.

Modifying a Delivered POI Type

You can modify the following fields for system delivered POI types:

- Effective Status.
- Person of Interest Checklist.
- Allow in Generic Add Component.
- Allow in Generic Upd Component.

Setting Up Holiday Schedules

To set up holiday schedules, use the Holiday Schedule (HOLIDAY_SCHED_TBL) component.

This section provides an overview of holiday schedule defaults on the Job Record and discusses how to define holiday schedules.

Understanding Holiday Schedule Defaults on the Job Record

Because holidays might vary for different segments of your workforce population (depending on location, work schedules, or other factors), you can define as many holiday schedules as you need.

Defaulting of the holiday schedule to the worker's job record depends upon the payroll system:

- PeopleSoft Enterprise Global Payroll.

If the payroll system is Global Payroll, the system does not enter a default holiday schedule on the Job Data - Payroll page. On the Payroll page, you may select a holiday schedule for the payee or leave the field blank. If you leave it blank, Global Payroll processes use the holiday schedule assigned to the payee's pay group.

- PeopleSoft Enterprise Payroll for North America.

If the payroll system is Payroll for North America, the default holiday schedule entered on the Job Data - Payroll page is determined by whether you're adding a worker or updating job data, and by whether you have defined a default holiday schedule for the location.

This section provides additional details for each of these conditions.

When You Add a Worker with Payroll for North America Payroll System

If the payroll system is Payroll for North America, the default holiday schedule initially entered on the Job Data – Payroll page is the holiday schedule that is associated with either the Location table or the Pay Group table:

- Location table.

If you have assigned a default holiday schedule on the Location Profile page, that schedule is the default when you add a worker with that location.

- Pay Group table.

If you leave the Holiday Schedule field blank on the Location table, the system enters the default holiday schedule that is assigned to the pay group.

You can change the holiday schedule on the worker's Job Data – Payroll page.

When You Change the Job Data of a Worker with Payroll for North America Payroll System

Changes in the following job data fields might cause a change in holiday schedule if the Holiday Schedule field is blank on the worker's Job Data – Payroll page:

- Company
- DeptID (department ID)
- Position Number
- Pay Group

Note. If the holiday schedule is already populated on the worker's job record, changes in these fields do not cause updating of the holiday schedule.

This is a description of the impact of changes in these fields:

- Company and DeptID.

If the worker's holiday schedule is not populated, changes in Company and DeptID cause the system to first enter the default holiday schedule from the Location table. If there is no default holiday schedule assigned on the Location table, the system enters the holiday schedule assigned on the Pay Group table.

- Position Number and Pay Group.

Changes in the Position Number and Pay Group fields cause the system to enter the default holiday schedule directly from the Pay Group table if the worker's holiday schedule is not already populated.

Page Used to Set Up Holiday Schedules

Page Name	Definition Name	Navigation	Usage
Holiday Schedule	HOLIDAY_SCHED_TBL	Set Up HRMS, Foundation Tables, Organization, Holiday Schedule, Holiday Schedule	Designate holidays for payroll processing.

Creating Holiday Schedules

Access the Holiday Schedule page (Set Up HRMS, Foundation Tables, Organization, Holiday Schedule, Holiday Schedule).

Holiday Schedule

Holiday Schedule: J02

Schedule Information

*Description:

Short Description:

Holiday Details Customize | Find | View All | First 1-7 of 70 Last

*Holiday	Description	Nbr of Hours	Holiday Type	Start Time	End Time		
01/01/2001	New Year's Day		Standard				
01/08/2001	Coming-of-Age Day		Standard				
02/11/2001	National Foundation Day		Standard				
02/12/2001	Substitute Holiday		Standard				
03/20/2001	Vernal Equinox Day		Standard				
04/29/2001	Greenery Day		Standard				
04/30/2001	Substitute Holiday		Standard				

Holiday Schedule page

Holiday Enter all of the holiday dates that your organization observes within this schedule.

Nbr of Hours (number of hours) (Optional) You can specify the number of paid hours for each holiday. Payroll for North America uses this field to reduce from pay.

Holiday Type

Select a holiday type.

The following values are used in PeopleSoft Payroll for North America:

Canadian: In Payroll for North America, this value designates a Canada statutory holiday.

Standard: In Payroll for North America, this value designates a U.S. holiday or Canada non-statutory holiday.

US Public: Select if the holiday is a public holiday in the U.S.

Start Time and End Time

(Optional) You can specify the starting and ending time of each holiday.

Note. Payroll for North America and Global Payroll do not refer to these fields.

Defining Business Units

To define business units, use the Business Unit (HR_BUSINESS_UNIT), Business Unit Options Defaults (BUS_UNIT_OPT_HR), and GL Business Unit (BUS_UNIT_GL) components.

This section discusses how to:

- Add and update business units.
- Identify business units in other applications.
- Set business unit defaults.

Pages Used to Update Business Units

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Business Unit	BUS_UNIT_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit	Add or update business units.
Business Unit Reference	BUS_UNIT_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit Reference	Identify business units in other PeopleSoft applications that are related to a business unit.
Business Unit Options Defaults	BUS_UNIT_OPT_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit Options Defaults, Business Unit Options Defaults	Set system defaults such as Company, Country, and Currency for a specific SetID.

Page Name	Definition Name	Navigation	Usage
GL Business Unit	BUS_UNIT_TBL_GL	Set Up HRMS, Foundation Tables, Organization, GL Business Unit, GL Business Unit	Review GL business units.

Adding and Updating Business Units

Access the Business Unit page (Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit).

Business Unit Business Unit Reference

Business Unit: CFMBU

*Status: Active

*Description: Canadian Business Unit

Short Description: Cdn BU

Default Record Group Set IDs

Set ID:	CDN	Canadian General SetID

OR

Clone from Existing Business Unit:

Business Unit page

Warning! To optimize system performance, your business units must be 5 characters. If your SetIDs or business units have fewer than five characters, you will experience serious performance degradation.

Status

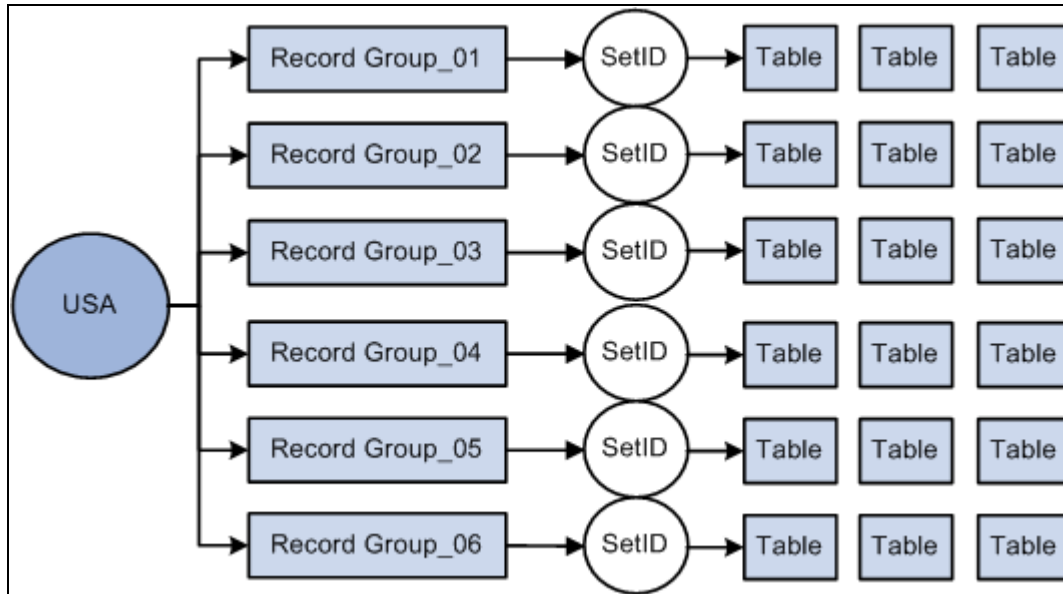
Select *Active* or *Inactive*. If you select *Inactive*, the business unit won't appear in any business unit lists in PeopleSoft HRMS.

Note. Business units aren't effective-dated, so use this field to implement or retire business units.

Understanding Your TableSet Sharing Options

Default Record Group Set IDs

When you define a new business unit on the Business Unit component, you specify that the system establish default record group setIDs for the new business unit, using the options in this group box. The SetID or Clone from Existing Business Unit value that you enter determines your preliminary tableset sharing setup for the new business unit by determining the setIDs that are assigned to each record group for the new business unit. The setID assigned to a record group determines which tableset is used when retrieving valid values from the various control tables for that business unit.



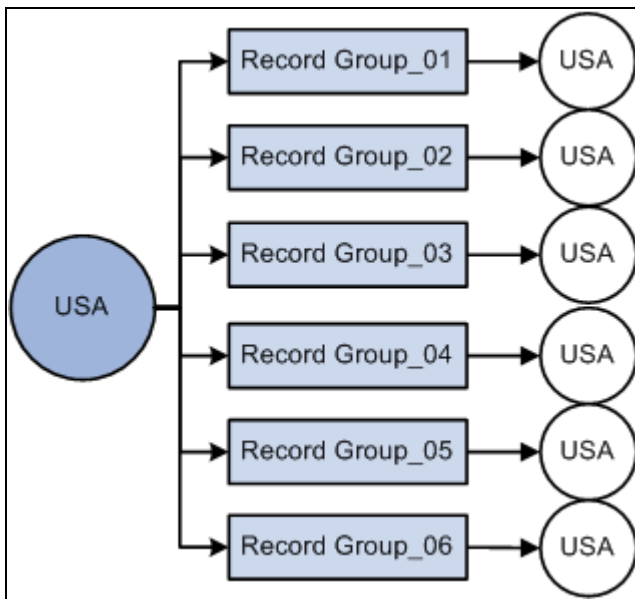
TableSet sharing

Establishing a TableSet Sharing Setup Using One Default SetID

If you want to define a tableset sharing setup for the new business unit you are creating, using a primary default setID that you can modify as necessary on the TableSet Control - Record Group page (SET_CNTRL_TABLE1), enter the default setID that you want to use.

When you add a new business unit to the system, the system populates the SetID field with a setID name that is the same as your new business unit. For example, if your business unit is called *USA*, then the SetID value defaults to *USA*. You can override the default setID as necessary.

When you save the business unit without changing the default setID, the system creates a new setID with the same name as the business unit, in this case *USA*, and this default setID of *USA* that you specified on the Business Unit page is assigned to each record group for the new business unit, as shown in this diagram:



TableSet sharing using default setID

Note. You can associate only one default setID with a business unit.

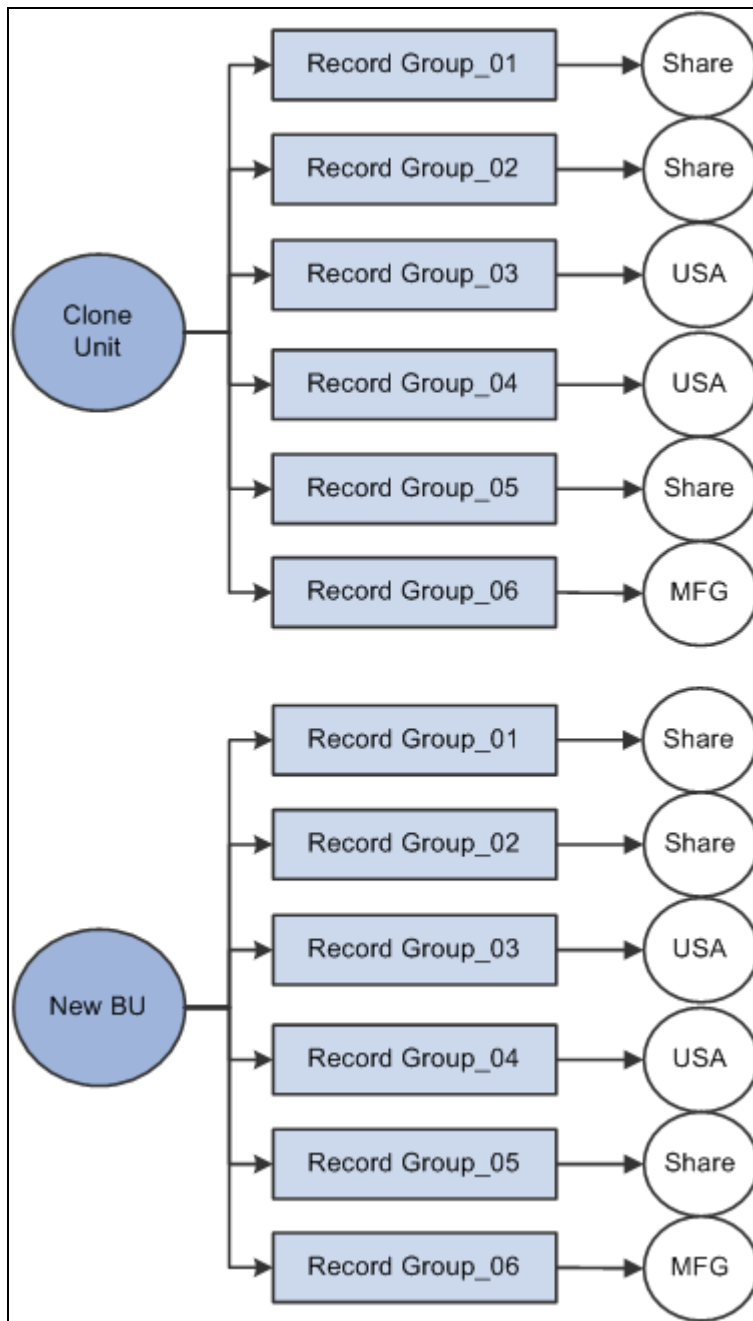
Cloning TableSet Setup From Existing Business Units

With the Clone from Existing Business Unit option, you can clone the TableSet sharing setup of an existing business unit.

Note. When you first enter the Business Unit page, the Clone from Existing Business Unit option is clear. To activate the option, clear any set ID values from the Set ID field and move out of the field.

If you want the tableset sharing for the new business unit that you are creating to mirror that of another business unit you've defined, or if you want the two units to be similar except for a few record groups, enter the business unit that you want to mirror as the cloned business unit. When the record groups are linked to the new business unit, the system assigns each record group the same setID that is used for the record group by the business unit that you selected as the Clone Unit.

For example, you specify an existing business unit to clone that has the setID *SHARE* associated with record groups 01, 02, and 05, setID *USA* associated with record groups 03 and 04, and setID *MFG* associated with record group 06. The new business unit you create will share these identical setID values for the same record groups, as shown in this diagram:



Cloning the tableset sharing setup from an existing business unit

Whichever method you select, after you save the new business unit for the first time, the system makes the default SetID or Clone from Existing Business Unit fields unavailable for entry. You can't change the default record group setID information from this page for this business unit again. This rule prevents you from accidentally overwriting the TableSet record group controls for your defined business units in PeopleSoft HRMS.

Note. When you add a new business unit and save the page, the system creates all the appropriate table values provided by PeopleTools that connect the business unit ID, the record group ID, and the setID.

TableSet sharing is set up as soon as you create your business units. However, the sharing, especially if you have chosen to create a TableSet sharing setup using one default setID, may need some fine-tuning. You can do this by changing the setIDs that are assigned to individual record groups on the TableSet Control — Record Group page. The system uses the default SetID value on this page when you add record groups.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "PeopleTools Utilities", TableSet Control - Record Group

Identifying Business Units in Other Applications

Access the Business Unit Reference page (Set Up HRMS, Foundation Tables, Organization, Business Unit, Business Unit Reference).

Business Unit

Business Unit Reference

Business Unit:

CFMBU

Canadian Business Unit

Business Unit Cross Reference

Asset Management Business Unit:

AR Business Unit:

Order Management Business Unit:

AP Business Unit:

Balancing Business Unit:

PO Business Unit:

Budgeting Business Unit:

Business Unit PC:

Billing Business Unit:

General Ledger Unit:

CM02

Inventory Business Unit:

Business Unit Reference page

Business Unit Cross Reference

In this group box, enter the business unit cross reference, if applicable, for any PeopleSoft application that is listed on the page. You identify other business units in other PeopleSoft applications that relate to your business unit.

Note. You can review which PeopleSoft Enterprise General Ledger units are associated with the PeopleSoft HRMS business units on the GL/HR Business Unit Mapping page (BU_GL_HR_LNK).

Setting Business Unit Defaults

Access the Business Unit Options Defaults page (Set Up HRMS, Foundation Tables, Organization, Business Unit Options Defaults, Business Unit Options Defaults).

Business Unit Options Defaults

Set ID:

SHARE

Table Set shared across Corp

*Company:

GBI

Global Business Institute 9999

*Country:

USA

United States

*To Currency:

USD

US Dollar

Standard Hours

*Default Standard Hours:

40.00

Minimum Standard Hours:

10.00

Work Period:

W

Weekly

Maximum Standard Hours:

40.00

Belgium

Industrial Committee:

NACE Code:

Canada

*Census Metropolitan Area:

ON

*Industrial Sector:

(Invalid Value)

Business Unit Options Defaults page

By setting up default values for a setID, you can specify the default values that populate these fields in your human resources system. Because the setID keys the Business Unit Options Defaults component (you can share these defaults among multiple business units.

Warning! The values that you enter or select on this page affect the default values throughout your PeopleSoft HRMS system.

Company, Country, and To Currency Select the Company, Country, and To Currency that the system will use as a default value.

Standard Hours

Default Standard Hours The system takes default standard hours from the Define Salary Plan component (SALARY_PLAN_TABLE), the Job Code Table component (JOB_CODE_TBL), or the Installation Table component (INSTALLATION_TBL).

Work Period The standard work period is the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency). The system takes default standard work period from the salary plan, the job code, or the Installation Table. The value that you enter here is used for validation in the Job Data pages (JOB_DATA) and the Position Data component (POSITION_DATA).

Minimum Standard Hours and Maximum Standard Hours Enter the default minimum and maximum standard hours for this SetID. The value that you enter here is used for validation on the Job Data pages and the Position Data component.

(BEL) Belgium

Industrial Committee Select the appropriate industrial committee for the company. This can be overwritten at the department level if necessary.

NACE Code Enter the NACE code for the company. Note: You can choose the level of detail for the NACE Code. It can range from 5 digits for group level, 6 for class level and 7 for subclass level.

(CAN) Canada

Census Metropolitan Area Select a metropolitan area.

Industrial Sector Select an industrial sector. The selected value is used as the default industrial sector for Canadian departments.

Note. These values affect Canadian regulatory reporting in PeopleSoft Enterprise Human Resources.

Entering Company Information

To enter company information, use the Company Legal Type (LEGAL_TYPE), Company (COMPANY_TABLE), and Company Table Report (RUN_PER707) components.

This section provides an overview of companies and discusses how to:

- Define company legal types.
- Define companies.
- Set default information for companies.
- (Payroll for North America) Enter liability and expense account codes.

- (USA) Set up tip allocation.
- (USA) Enter FICA and tax information.
- (BEL) Enter default information and salary factors.
- (BEL) Associate a provider with a setID.
- Enter phone information.
- Define company rules.

Understanding Companies

Use the Company component to enter information about a single company or multiple companies in your organization, from the corporate address to general ledger accounts, tax information, and payroll processing information.

If you're using only PeopleSoft Human Resources, you enter information only on the Company Location page (COMPANY_TABLE1) for each company that you want to add. You can also associate a default pay group with the company on the Default Settings page (COMPANY_TABLE2_GBL). The value you select appears as the default on the Job Data pages for people in this company. However, it is easier to treat each company that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

If you're using PeopleSoft Global Payroll, you must enter additional, payroll-specific company information on the Pay Entity component (GP_PYENT), if your pay entity is the same as the company. You do this in PeopleSoft Global Payroll.

(USA) Special Considerations for U.S. Companies

PeopleSoft Enterprise Pension Administration tracks pension payees through retiree jobs that are separate from and concurrent with employees' active job data records. These retiree jobs must be associated with specific retiree companies. Therefore, be sure to set up companies to house your payees. Because pension plans are distinct tax reporting entities with their own U.S. Employer Identification Numbers (EINs), you typically set up one retiree company for each pension plan that you sponsor. Once you set up your retiree companies, you can match companies to pension plans in the Plan Administration component (PLANADM).

For U.S. companies, if you're using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a company is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes. Because pension plans have EINs, you create companies for each pension plan. You reference a pension plan company from the payee job data record of anyone collecting benefits from that plan.

If your company uses PeopleSoft Payroll for North America, each company that you add must be equivalent to each EIN that you use. To add a company EIN, your payroll staff needs to complete all three pages at least once.

See Also

PeopleSoft Enterprise Pension Administration 9.1 PeopleBook, "Establishing Plan Administration Information," Entering Funding Provider and Company Information

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook

PeopleSoft Enterprise Payroll Interface 9.1 PeopleBook

Pages Used to Enter Company Information

Page Name	Definition Name	Navigation	Usage
Company Legal Type	LEGAL_TYPE_TBL	Set Up HRMS, Foundation Tables, Organization, Company Legal Type, Company Legal Type	Many countries require that you report on your organization's legal structure, whether it's a corporation, a public limited company, a cooperative, or another type of organization. You can associate the correct legal type with each company on the Company Table and use the information when you generate reports.
Company Location Agency Location	COMPANY_TABLE1	- Set Up HRMS, Foundation Tables, Organization, Company, Company Location - Set Up HRMS, Foundation Tables, Organization, Agency USF, Agency Location	Define and describe companies.
Default Settings	COMPANY_TABLE2_GBL	- Set Up HRMS, Foundation Tables, Organization, Company, Default Settings - Set Up HRMS, Foundation Tables, Organization, Agency USF, Default Settings	Set up default company information; for example, the company pay group, salary point values, and Claeys formula factors for Belgian companies.

Page Name	Definition Name	Navigation	Usage
(Payroll for North America) General Ledger Liability Accts	COMP_TBL7USA_SEC	Select the General Ledger Accounts link on the Default Settings page.	Use the General Ledger Liability Accts page to enter General Ledger account codes for net pay and direct deposits.
Tips Processing	COMP_TBL6USA_SEC	Click the Tips Processing link on the Default Settings page.	Set up tip allocation.
Tax Details	COMP_TBL8USA_SEC	Select the Tax Details link on the Default Settings page.	Use the Tax Details page to specify your federal employer identification number, link companies together, and define default tax status.
(BEL) Claeys Defaults	COMP_TBL2ABEL_SBP	Click the Claeys Defaults link in the Belgium section on the Default Settings page.	Enter the default information and salary factors that are used to perform Claeys formula calculations.
External Providers BEL	COMP_TBL2BBEL_SBP	Click the External Providers link in the Belgium section on the Default Settings page.	Associate a provider with a setID.
Phones	COMPANY_TABLE3_GBL	- Set Up HRMS, Foundation Tables, Organization, Company, Phones - Set Up HRMS, Foundation Tables, Agency USF, Company, Phones	Enter telephone information for a company.
Rules Definition	COMPANY_TABLE4_GBL	- Set Up HRMS, Foundation Tables, Organization, Company, Rules Definition - Set Up HRMS, Foundation Tables, Organization, Agency USF, Rules Definition	Define FTE rules for the company.

Page Name	Definition Name	Navigation	Usage
Company Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Company Table Report, Run Control	Run the Company Table report (PER707). This report prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table.

Defining Companies

Access the Company Location page (Set Up HRMS, Foundation Tables, Organization, Company, Company Location or Set Up HRMS, Foundation Tables, Organization, Agency USF, Agency Location).

Company Location
Default Settings
Phones
Rules Definition

Company: KD1

Location
Find First 1 of 1 Last

*Effective Date: 01/01/1980
*Status: Active
Go To Row

*Description: Continental Commerce - Germany

Short Descr: CC-Germany

Location Set ID: DEU01 Setid for DEU01 BU

Location: KD912 Zweigstelle München

*Default Set ID: DEU Germany Table Sets

Legal Entity:

Country: DEU Germany

Address: Muenchner Strasse 14
85774 Munich
Bayern
Edit Address

Email Addresses
Customize Find View All First 1 of 1 Last

	*Address Type	*Email Address	
1			+ -

Company Location page (1 of 2)

The screenshot displays the 'Company Location' page, which is divided into two main sections: Belgium and Japan.

Belgium Section:

- Header: **Belgium** (with a small flag icon).
- Section: **Mailing Address** (highlighted in blue).
- Fields:
 - Country:** A dropdown menu showing 'USA' with 'United States' as the selected option.
 - Address:** A large text input area.
 - Edit Address:** A button next to the address field.

Japan Section:

- Header: **Japan** (with a small flag icon).
- Section: **Representative Information** (highlighted in blue).
- Navigation: **Find | View All** (with 'First' and 'Last' buttons) and **1 of 1** (with '+' and '-' buttons).
- Fields:
 - *Effective Date:** A date input field showing '08/04/2009' with a calendar icon.
 - Title:** A text input field.
 - Name:** A text input field.

Company Location page (2 of 2)

For a single-company environment, you set up this table only once; for multiple-company environments, you set up a company code for each company.

(BEL) Belgium

Enter the mailing address information for your Belgian companies.

(JPN) Japan

Title

Enter the title of your company's representative as of the effective date. This is the person whose title (and name) appears by default on the Appointment Notification report page.

If you accept the default—which you can override on the report page—the title and name appear on the Notification of (Hiring, Department Change, Grade Advance or Termination) pages.

Name

Enter the representative's name. You can override this default on the Appointment Notification report page.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "(JPN) Tracking Additional Appointments (Kenmu)," Recording and Viewing Employee Additional Appointments Data

Setting Default Information for Companies

Access the Default Settings page (Set Up HRMS, Foundation Tables, Organization, Company, Default Settings or Set Up HRMS, Foundation Tables, Organization, Agency USF, Default Settings).

Company Location

Default Settings

Phones

Rules Definition

Company:K1G GP US Company G

Default Settings

FindFirst1 of 1Last

Go To Row

Effective Date:

01/01/2004

Status:

Active

Regulatory Region:

USA

United States

Points Value:

Currency Code:

USD

US Dollar

Payroll for North America

Pay Group:

Default Earnings Program:

*Lines on Paysheet:

15

Activity Days for Terminations:

30

Federal Tax Deduction Priority:

100

State Tax Deduction Priority:

110

☒ Single Check for Multiple Jobs

☒ Pay Taxes through AP

[General Ledger Accounts](#)

[Tips Processing](#)

[Tax Details](#)

Default Settings page (1 of 6)

 Belgium

Company Information

Company Trade Name:

[Claeys Defaults](#)

Registration for Trade:

[External Providers](#)

Legal Entity:

☐ Salary Limit

Official Language:

Employer Data

Natl Office for Social Sec:

Overseas Soc Ins Inst:

RIZIV Nbr:

Federal Pension Institute:

Geo Loc NOSS:

Statistics Institute:

Industrial Committee:

NACE Code:

 Canada

Workers' Compensation Board

Firm Number:

Rate Number:

 Switzerland

AHV Number:

Accident Insurance Number:

Trade Registry Number:

Default Settings page (2 of 6)

Germany

☐ OECD Permission Required
☒ Medical Checkup Required

Accident Insurance:

Social Insurance Accident Nbr:

Tax Unit:

Spain

Fiscal Identification Code:

France

SIREN Code:

APE Code:

Bank ID:

BankData Check Digit:

Base Scheme:

Option:

Company Fund Membership

Customize | Find | | First 1 of 1 Last

Membership Number	Description	Institution Nbr	Description	Fund Code	Description
1	Membership Number				

United Kingdom

Business Description:

Default Settings page (3 of 6)

Italy

Representatives

Customize | Find | View All | | First 1 of 1 Last

	*Representative Type	Empl ID	Description		
1				+	-

Netherlands

Federal Employer Tax ID:

Providers

Customize | Find | View All | | First 1 of 1 Last

	Set ID	Vendor ID	Registration Nbr		
1				+	-

USA

Employer ID Number:

☐ FLSA Required

Federal Reserve Bank ID:

Federal Reserve Bank District:

EEO Company Code:

Default Settings page (4 of 6)

 Australia	
Salary Packaging	
☐ Liable for Payroll Tax	
TEC Comp Rate Code:	
TPV Comp Rate Code:	
Higher Education	
Institute Code:	
Australian Public Service	
Agency Code:	
 New Zealand	
Classification Unit:	
 Argentina	
CUIT:	
DGI Office:	
Main Activity:	
Legal Book Last Page Nbr:	

Default Settings page (5 of 6)

The screenshot shows a web application interface for setting up organization foundation tables. It is divided into three sections, each for a different country: Mexico, Brazil, and Malaysia.

Mexico Section:

- Company Information:** Includes a search bar with "Find | View All | First | 1 of 1 | Last". Below it is a table with the following fields:
 - *Effective Date: 08/04/2009 (with a calendar icon)
 - Company Settings: (empty text box)
 - RFC: (empty text box)
 - INFONAVIT ID: (empty text box)
 - % Creditable Subsidy Applied: (empty text box)
 - % Creditable Subsidy: (empty text box)
- Legal Representative:** Includes fields for Name: (empty text box), RFC: (empty text box), and CURP: (empty text box).

Brazil Section:

- *Nature of Declarer: MixC/PubFedCo.Inv.Fun/ClubAdri (dropdown menu)
- *Option to Simples: Opting (dropdown menu)

Malaysia Section:

- Reference Number: (empty text box)
- Registration Number: (empty text box)

Default Settings page (6 of 6)

Default Settings

Points Value Enter the monetary value of your points.

Payroll for North America

These fields are for companies using PeopleSoft Payroll for North America.

Pay Group If you enter a value in this field, the pay group appears as the default for all employees in this company. You save data-entry time at the employee level if most employees have the same pay group.

Note. The size of this field varies depending on whether you use PeopleSoft Global Payroll or PeopleSoft Payroll for North America. First, set up your PeopleSoft Global Payroll or PeopleSoft Payroll for North America pay groups to make them available here. Where you do that depends on which payroll application you use.

Default Earnings Program Select a default value for people in this company.

Lines on Paysheet	Enter the number of lines for the paysheet. Paysheets serve as a repository for the data that is required to calculate the employee pay for each pay period. <i>See PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Defining Earnings Codes and Earnings Programs."</i>
Activity Days for Terminations	This field is for information purposes only.
Federal Tax Deduction Priority and State Tax Deduction Priority	Enter the federal and state tax deduction priorities.
Pay Taxes through AP (pay taxes through Accounts Payable)	Select to indicate if this company is tracking its taxes through Accounts Payable.
General Ledger Account Codes	Click to enter information about general ledger account codes.
Tips Processing	Click to set up the parameters for handling tips in your company's environment.
Tax Details	Click to enter FICA and tax details.
(BEL) Belgium	
Company Trade Name	Enter the name of your Belgian company; for example, Continental Commerce - Belgium.
Registration for Trade	Enter the company's official registration number from the Belgian Trade Register.
Legal Entity	A legal entity is the legal form that applies to a company: <i>Inc</i> (corporation), <i>Coop</i> (cooperative), and so forth. The translate values reference different forms that you can select to indicate whether the company is public or privately held or whether it is of limited liability.
Salary Limit	Select to set a maximum salary limit. While selecting this check box doesn't enforce any salary limits in the system, you can use it as a reference to prevent salary raises that exceed company limits or that would occur during periods where increases aren't allowed. If your organization enforces periods where no salary increases are allowed or limits salary increases, you can modify the PeopleCode behind this page. Then, when you select this check box, the system it to ensure that no raises are allowed during these periods.
Official Language	Select the company official language. This value is used as the default person's official language, with the exception of companies located in the Brussels-Capital Region, for which the person's preferred language is used as the default.

Claeys Defaults	Click to enter Claeys default and salary factor information on the Claeys page. See Chapter 11, "Setting Up Organization Foundation Tables," (BEL) Entering Default Information and Salary Factors, page 267.
External Providers	Click to enter Belgian provider information for tracking third-party providers on the Providers page. See Chapter 11, "Setting Up Organization Foundation Tables," (BEL) Associating a Provider with a SetID, page 268.
Natl Office for Social Sec (national office for social security)	Enter the number under which the company is registered at the National Office for Social Security.
Overseas Soc Ins Inst (overseas social insurance institution, federal pension institute)	Enter the company's overseas social insurance institution, federal pension institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.
RIZIV Nbr (RIZIV number)	Enter the RIZIV code. It records the company's Federal Institute for Illness and Disability Insurance category.
Geo Loc NOSS (geographic location for State Social Insurance category)	Enter the geographical location for the NOSS.
Statistics Institute	Enter the statistics institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.
Industrial Committee	Select the appropriate industrial committee for the company. You can override this value at the department level.
NACE Code	Enter the NACE code for the company. Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

Firm Number and Rate Number	Enter if you are tracking Workers' Compensation Board data for Canadian workers.

(CHE) Switzerland

AHV Number (Alters- und Hinterbliebenen Versicherung number)	Enter the number of the responsible AHV compensation office. This numeric code can be up to 6 characters.
Accident Insurance Number	Enter the number assigned to the company by its accident insurance company. Use this number in health and safety reporting.
Trade Registry Number	Enter the number assigned to the company by the Trade Registry office. The format is 999.9.999.999-9.

(DEU) Germany

OECD Permission Required (Organization for Economic Cooperation and Development permission required)	Select if applicable. Germany requires OECD permission for workers from non-OECD countries to work in certain types of industry, such as defense or high technology.
Medical Checkup Required	Select if a medical checkup is required for your workers under German labor law.

(ESP) Spain

Fiscal Identification Code	Enter your company's fiscal identification code as assigned by the Spanish government.

(FRA) France

SIREN Code (<i>Système Informatique pour le Répertoire des Entreprises</i> code)	Enter a SIREN code for this organization. This code is assigned to a company when it registers as a business with the French government. The code isn't required for your human resources system, but is required on many company documents.
APE Code (<i>Activite Principale Exercee</i> code)	Select an APE code. This code serves as a classification of the type of industry that the company is involved in (banking, software, insurance, and so forth). The code is required by French law and must appear on all company regulatory reports.
BankData Check Digit	Enter a bank data check digit (optional).

Base Scheme	Select the base scheme for the company. Base schemes are defined on the Mandatory Base Scheme page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Base Scheme) and are required for DADS reporting. See <i>PeopleSoft Enterprise Global Payroll for France 9.1 PeopleBook</i>, "Setting Up DADS Reporting." See <i>PeopleSoft Enterprise Global Payroll for France 9.1 PeopleBook</i>, "Generating DADS."
Option	This field was previously used in DADS reporting for the previous DADS norm (DADS-TDS). However, the field is no longer used with the current DADS reporting that uses the DADS-U norm.
Company Fund Membership	This scroll area displays the pension/contingency contracts defined for the company on the Pensions/Contingency Contracts page. Click the Membership Number link to view the contract definition. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements</i>, "(FRA) Meeting Regulatory Requirements for France," Setting Up Pension/Contingency Fund Contracts.

Note. The system doesn't check the format of the numbers that you enter in the fields on this page.

(GBR) United Kingdom

Business Description	Enter the company business description. This information is used on the two local UK RIDDOR reports, which are located on the Monitor Health/Safety menu. The system prints the business description of the relevant company from the Job record of each employee.

(ITA) Italy

Company Code Type and Company Code	Enter the company code type and code that is assigned to your company by the Italian regulatory authorities.
Main Code	Select if this is the main company code that is used for reporting purposes.

(NLD) Netherlands

Federal Employer Tax ID	Enter the tax ID number that is provided by the Dutch government. It is required for the wage declaration that is submitted to the Tax Authority. See <i>PeopleSoft Enterprise Global Payroll for the Netherlands 9.1 PeopleBook</i>, "Withholding and Reporting Taxes," Generating Wage Declarations.

Vendor ID

Select the providers that are associated with the company. For Dutch illness reporting, the system uses the vendor that has the HRMS Class field on the Vendor Information page set to *I (Industrial Insurance Board Provider)*. Set up vendors using the Provider/Vendor Table component (Set Up HRMS, Product Related, Benefits NLD).

Dutch illness reporting is delivered with the Human Resources Monitor Absence business process and PeopleSoft Enterprise Global Payroll for the Netherlands.

See *PeopleSoft Enterprise Global Payroll for the Netherlands 9.1 PeopleBook*, "Updating Absences," Understanding Dutch Illness Reporting.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Monitor Absence*, "(NLD) Using Dutch Illness Reporting."

Registration Nbr
(registration number)

Enter the registration number for the insurance provider, which you obtain from the provider. The registration number is a required field for the vendor that is used in Dutch illness reporting.

(USA) USA**Employer ID Number**

Specify the unique Federal Employer ID Number (EIN) associated with the company. This control becomes the default for the Employer ID State Withholding control on the Company State Tax Table.

Note. If you choose to set up multiple companies with the same EIN, modifications must be made to the quarterly wage reports to 'roll-up' these totals (for example, TAX810XX, TAX860XX, TAX002XX, etc.).

However, for Annual W-2 reporting, employee balances can be combined using the W-2 Reporting Company feature.

FLSA Required

Select this option if *any* non-exempt employees in the company need to have the FLSA rate calculated for their overtime pay. If there are Pay Groups with non-exempt employees who do not need to have the FLSA rate calculated then the FLSA Required flag on the Pay Group should be deselect.

Deselecting the FLSA Required on the Company component prevents you from using the FLSA calculation for all pay groups because the FLSA Required flag on the Pay Group component (PAYGROUP_TABLE) is hidden.

If you select this option, also select the applicable FLSA rule to indicate how and when the FLSA calculated premium will apply to overtime pay.

**Higher of
FLSA/Contractual**

FLSA premium will apply only when it is greater than the contractual rate.

**Always use FLSA
Premium**

Use the FLSA premium amount regardless of the contractual rate.

**Federal Reserve Bank
ID**

The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank (FRB) identifier assigned to this company by the FRB.

Federal Reserve Bank District	The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank District Designator indicating which FRB is doing the issuing of the bonds.
EEO Company Code (equal employment opportunity company code)	If the U.S. government has assigned this company a code for EEO-1 and VETS 100 reporting, enter the number.
(AUS) Australia	
Liability for Payroll Tax	Specify whether tax is applicable to the default compensation rate components. When you select this check box, the state payroll tax rates you set up on the State Payroll Tax page (PKG_PYTX_RT_TBL) are used in the package compensation calculation for your salary-packaged employees.
TEC Comp Rate Code and TPV Comp Rate Code	Specify the default compensation rate code for TPV (Total Package Value) and TEC (Total Employment Cost) that you will use in salary packaging enrollment. You set up your compensation rate codes on the Comp Rate Code Table page (COMP_RATECD_TBL).
Institute Code	This group box appears only if you've selected the Education & Government check box on the Installation Table component. Enter the Institute Code identifier for DETYA reporting. This is used by the system to track information about the institute for reporting purposes and defaults on any page where this is required information.
Agency Code	This group box appears only if you've selected the Education & Government check box on the Country Specific page of the Installation component. Enter the agency code for the company.

(NZL) New Zealand

Classification Unit	Enter the classification unit for your company. This information comes from the Class Unit Table page (CLS_UNT_TBL_NZL). The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements*, "(NZL) Meeting Regulatory Requirements for New Zealand," Setting Up the ARCI Table.

(ARG) Argentina

CUIT (Código único de Identificación Tributaria)	Enter the Unique Tax Identification Code corresponding.
Legal Book Last Page Nbr	Displays the last page number for the Legal Book Report that details employees' earnings and deductions.

(MEX) Mexico

Company Settings	Define the company's activity. Typical values are <i>Financial, Pharmaceutical, Manufacturing, Services, Tourism, and Sales</i> .
RFC	Enter the RFC ID for your company. The Mexican Treasury (<i>Secretaria de Hacienda y Credito Publico</i>) identifies each company with an RFC ID. Social security, taxes, and payroll reports use the RFC ID.
INFONAVIT ID	Enter the INFONAVIT ID for your company.
% Creditable Subsidy	Enter the percentage of accreditable subsidy. This value is used to calculate federal taxes.
Name	Enter the name of the person who acts as the legal representative for the company.
RFC and CURP	Enter these values for the legal representative.

(BRA) Brazil

Nature of Declarer	Enter the legal nature of the establishment. This information is used for reporting purposes.
Option to Simples	Select an option to simples value to have the company's contributions replaced by the actual invoice contribution amounts after invoices are generated.

(MYS) Malaysia

Reference Number	Enter the company tax reference number (the Company C File Number). This number is used in Annual Statement of Tax Deductions - Malaysian CP159 report (GPMYTX05).
Registration Number	This is the company registration number, assigned by the government of Malaysia assigns to an organization to uniquely identify the company. This is used in CP39 Monthly Statement of Tax Deductions - Electronic form (GPMYTX04).

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration, "Requesting Works Councils Approval"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Salary Packaging, "Setting Up Salary Packaging," Setting Up Salary Packaging Company Payroll Tax Options

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Setting Up Rate Codes

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook

PeopleSoft Enterprise Global Payroll 9.1 PeopleBook

(Payroll for North America) Entering General Ledger Account Codes

Access the General Ledger Liability Accts page (click the General Ledger Accounts link on the Company Table - Default Setting page).

General Ledger Liability Accts

Net Pay: 

Direct Deposits: 

Employee Liabilities

FWT: 

EIC Advances: 

FICA OASDI: 

FICA MediCare: 

Garnishment Company Fee: 

Employer Liabilities

FICA OASDI: 

FICA MediCare: 

FUT: 

☐ Distribute Expense

General Ledger Liability Accts page

Select the combination codes for each liability.

The Net Pay and Direct Deposits fields on this page are applicable to both U.S. and Canada. The liability combination codes are related to U.S. tax accounting information only. Canadian companies use the Wage Loss Plan Table to enter GL tax accounting information.

Distribute Expense

Select this box to distribute the cost of benefits between an employee's home department and other departments where the employee earns earnings (such as an employee who has multiple jobs). The system distributes the cost of benefits according to the percentage of total earnings that the employee earned in each department. If you do not select this check box, all expenses are distributed to the employee's home department.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "Setting Up Payroll Tax Tables," (CAN) Setting Up Wage Loss Plans.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "Setting Up Garnishments," Establishing a General Ledger Account for Company Fees.

(USA) Setting Up Tip Allocation

Access the Tips Processing page (click the Tips Processing link on the Company Table - Default Settings page).

Tips Processing

☐ Tips Processing

Tips Allocation Controls

*Tip Establishment Field:

Job Location

Minimum Tips Percent:

8.00000

*Tips Allocation Method:

Gross Receipts

Tips Allocation Earnings Code:

Tips Payroll Controls

☐ Delay Withholding of Taxes

☒ Adjust to Minimum Wage

Min Wage Adjustment Earns Code:

Tip Credit Earnings Code:

OK

Cancel

Tips Processing page

Tips Processing

Select to indicate the use of this feature. Tip allocation is required when the amount of tips reported by tipped worker for a pay period is less than a specified percentage of an establishment's gross receipts for that period.

Tips Allocation Controls

These values populate the Tip Establishment page (TIPS_ESTAB_TBL).

Tip Establishment Field

This field designates where the tips are acquired. Tips allocation is done for each establishment. An establishment is an individual restaurant, hotel, or other unique location. If a company has 15 restaurants, tips are allocated separately for each restaurant. You cannot override this value in the Tip Establishment page.

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Minimum Tips Percent Enter the minimum percentage of tips to be distributed to workers. The percentage specified by the federal regulations is 8 percent. Employers can apply for a lower percentage if it can be shown in writing that the tip rate at an establishment is less than 8 percent. You can override this value in the Tip Establishment table.

Note. The minimum tips percent value is based on federal and state regulations.

Tips Allocation Method Select the tip allocation method used for this company. Only establishments that employ fewer than 25 employees (tipped and nontipped) during a pay period can use the *Hours Worked* method. You can override this value in the Tip Establishment table.

Tips Allocation Earnings Code Select the earnings code to record the amount calculated by the tip allocation process. You cannot override this value in the Tip Establishment table.

Tips Payroll Control

These values populate the Pay Group table, where you can override them.

Delay Withholding of Taxes Select to have the system delay withholding until the worker reports 20 USD of tips in a month federal and state taxes for each earning that is indicated for tax withholding in the Tax table.

Adjust to Minimum Wage (adjustment to minimum wage) Select this check box unless your company has a special agreement with the Internal Revenue Service. This ensures that tipped workers receive necessary wage adjustments to bring them up to the minimum wage.

Min Wage Adjustment Earns Code (minimum wage adjustment earnings code) Select the earnings code to be used when tips plus wages do not meet statutory minimum wage requirements.

Tip Credit Earnings Code Select an earnings code for recording tip credits. Tip credits are memo earnings to identify what portion of reported tips goes toward payment of the federal minimum wage (state minimum wage is used if it is higher than the federal minimum wage).

(USA) Entering FICA and Tax Information

Access the Tax Details page (click the Tax Details link on the Company Table - Default Settings page).

Tax Details	
Balance Processing Common Paymaster ID: Other Common ID:	Tax Report Type ☒ W-2 or Territories ☐ W-2PR ☐ 1099R ☐ Non-Employees ☐ None
FICA Status-Employer ☒ Subject ☐ Exempt ☐ Medicare only	FICA Status-Employee ☒ Subject ☐ Exempt ☐ Medicare only
SDI Status-Employee ☒ Subject ☐ Exempt	FUT/SUT ☐ FUT Exempt ☐ SUT Exempt
OK Cancel	

Tax Details page

Use the Balance Processing options when two or more related corporations concurrently employ one or more workers and pay them through one of the corporations as a common paymaster. By selecting these controls, the system treats simultaneous employee balances in multiple companies as one total balance when calculating payroll.

The total Social Security and Medicare taxes that must be paid are determined as if the people had one employer—the common paymaster—paying all their wages. The system will also recognize balances in all companies linked by a common paymaster when determining if a certain limit has been met—so you don't have to calculate employee balances manually.

Common Paymaster ID Enter a Common Paymaster ID to tell the system to treat *all employee tax, deduction, garnishment, and earnings balances* as one for companies sharing that Common Paymaster ID.

Other Common ID Enter an Other Common ID to tell the system to treat *all employee deduction garnishment, and earnings balances* as one for companies sharing that Other Common ID.

You'd typically use an Other Common ID when you need to keep your companies separate for tax purposes, but need to maintain accurate current employee balances across companies for calculating Section 415 limits, year-to-date deduction maximums, and maximum yearly earnings ceilings. Leave accrual balances are not included in Common Paymaster ID or Common Other ID processing.

Tax Report Type	This field is used by the year-end tax reporting programs. PeopleSoft Payroll for North America requires employees and supported types of persons of interest to be associated with companies that have the correct tax report type: • Employees must be associated with companies with one of these tax report types: • W-2 or Territories • W-2PR (W-2 Puerto Rico) • <i>Other Payee</i> and <i>Pension Payee</i> persons of interest must be associated with companies with tax report type 1099R. • Student Refund persons of interest must be associated with companies with tax report type Non-Employees or None. Note. To produce Forms W2PR for Puerto Rico in Payroll for North America, you must have paid Puerto Rico employees in one or more separate companies for the entire tax year being reported. Each Puerto Rico employee's home address must be set up with the country code <i>USA</i> and the state code <i>PR</i> for proper tax reporting. Note. To include retirees in your year-end reports, you must set them up in a separate 1099-R company.
FICA Status-Employer	This field is information only.
FICA Status-Employee	This information appears as a default on the Job Information page (JOD_DATA_JOBCODE).
SDI Status-Employee	For states where the SDI status is not specified as <i>Not Applicable</i> , the Employees' SDI Status will appear as a default.
FUT Exempt	Select this option if the company is exempt from FUT.
SUT Exempt	Select this option if the company is exempt from SUT.

(BEL) Entering Default Information and Salary Factors

Access the Claeys Defaults page (click the Claeys Defaults link on the Default Settings page).

Claeys Defaults

Factor Seniority:

Factor Yearly Base:

Factor Age:

Number of Months to Reduce:

Correct Factor:

Claeys Salary Limit:

Salary Factors

Hour/Year Factor:

Month/Year factor:

Week/Year Factor:

Year/Year Factor:

Claeys Defaults page

Claeys Salary Limit	Enter the salary limit for applying the Claeys formula.
Hour/Year Factor	Enter the hour/year factor to calculate the hourly amount that an worker earns and gross that amount up to the yearly total.
Month/Year Factor	Enter the month/year factor to calculate the monthly amount that an worker earns and gross that amount up to the yearly total.
Week/Year	Enter the week and year to calculate the weekly amount that an worker earns and gross that amount up to the yearly total.
Year/Year	Enter the year/year factor to calculate the yearly total.
Note. In Belgium, the year factor is 13.85.	

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "(BEL) Entering Additional Data for Belgian Workers"

(BEL) Associating a Provider with a SetID

Access the External Providers BEL page (click the External Providers link on the Default Settings page).

External Providers BEL

Providers							Customize	Find	View All	First	1 of 1	Last
Set ID	Description	Vendor ID	Vendor Name	Affiliate	Registration Nbr							
1												

External Providers BEL page

SetID and **Vendor ID** Select from the list of options. The system lists all valid providers, not just Belgian providers.

Affiliate Enter the affiliate, if applicable.

Registration Nbr (registration number) Enter the registration number, if applicable.

Entering Phone Information

Access the Phones page (Set Up HRMS, Foundation Tables, Organization, Company, Phones).

Company Location Default Settings **Phones** Rules Definition

Company: K1G

Phones / Processing Controls Find | View All First 1 of 1 Last

Effective Date: 01/01/2004 Status: Active Go To Row

Description: GP US Company G

Processing Controls

Industry: Core ☒ Override Operator Industry

Industry Sector: Core

France

Labor Agreement:

Phone Information Customize | Find | View All First 1 of 1 Last

Phone Type	Telephone	Country Code		
1				

Company - Phones page

Processing Controls

Override Operator Industry

Select if the operator industry can be overridden.

(FRA) France

Labor Agreement

Select a Labor Agreement code from the list.

Phone Type and Telephone

Enter the phone type, such as *Business*, *Home*, and so forth, and the phone number. The phone fields are effective-dated and scrollable so that you can enter multiple phone types and maintain history data.

Defining Company Rules

Access the Rules Definition page (Set Up HRMS, Foundation Tables, Organization, Company, Rules Definition).

Company Location

Default Settings

Phones

Rules Definition

Company:

K1G

Decimal Precision for Full-Time Equivalency

Find | View All

First

1 of 1

Last

*Effective Date:

08/04/2009

*Status:

Active

Go To Row

+

-

FTE Decimal Precision:

0

France

PAID FTE Decimal Precision:

0

Rules Definition page

FTE Decimal Precision

Enter the number of decimal points the system will use when calculating FTE.

Note. If you set this field to zero or leave it blank, the FTE calculations on the Job Data pages will default to 1 regardless of the number of hours entered or part/full-time status.

(FRA) France

PAID FTE Decimal Precision

Enter the number of decimal points the system will use when calculating FTE for payment purposes.

(USF) Entering Agency Information

To enter agency information, use the Agency USF (AGENCY_TABLE) and the Agency Table Report (RUN_FGPER803) components.

This section provides an overview of agency information and discusses how to enter payroll information.

Understanding Agency Information

Use the Agency component (AGENCY_TABLE) to enter information about a single agency or sub-agencies in your organization, from the central agency address to general ledger accounts, tax information, and payroll processing information. Most pages contain data from PeopleSoft Payroll for North America.

If you use only PeopleSoft Human Resources, you enter information only on the first page, the Agency Location page, for each agency that you want to add. You can also associate a default pay group with the agency on the Default Settings page. The value that you select appears as the default on the Job Data pages for workers in this agency. However, it is easiest to treat each agency that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

If you're using PeopleSoft Payroll for North America, an agency is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

If your agency uses PeopleSoft Payroll for North America, each sub-agency that you add must be equivalent to each EIN that you use. Your payroll staff needs to complete all nine pages at least once to add an agency EIN.

You can print a report of your Agency table using the Agency Table report.

Note. The Agency Location, Default Settings, Phones, and Rules Definition pages in the Agency Table component are identical to those in the Company Table component and share the same object names.

Pages Used to Enter Agency Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Payroll Interface Information	GVT_COMPANY_TBL7	Set Up HRMS, Foundation Tables, Organization, Agency USF, Payroll Interface Information	Enter the agency's payroll interface information.
Payroll Office Address	GVT_COMPANY_TBL8	Set Up HRMS, Foundation Tables, Organization, Agency USF, Payroll Office Address	Enter the agency's payroll office address information.
ECS Address (electronic certification system address)	GVT_COMPANY_TBL9	Set Up HRMS, Foundation Tables, Organization, Agency USF, ECS Address	Enter the agency's ECS address information.

Page Name	Definition Name	Navigation	Usage
Agency Table Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Agency Table Report USF, Run Control	Run the Agency Table report (FGPER803). This prints all agencies in the Agency component and default information, including name and address, agency code, and effective date.

See Also

Appendix D, "PeopleSoft Application Fundamentals for HRMS Reports," Basic HRMS Reports, page 1106

Entering Payroll Information

Access the Payroll Interface Information page (Set Up HRMS, Foundation Tables, Organization, Agency USF, Payroll Interface Information).

Agency Location | Default Settings | Phones | Rules Definition | **Payroll Interface Information** | Payroll Office Address

Company: AG Department of Agriculture

Payroll Office Contact/ID Information Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 Status: Active

Description:

Payroll Office Contact Info

Contact Person:

Contact Title:

Contact Type:

Contact Phone:

☐ FTS Indicator

Payroll Office ID Info

Agency ID:		FRB Company ID No:	
Agency Check ID:		FRB Location ID No:	
Agency TSP ID:		FRB Acct No:	
Agency TSP Account:		FRB Branch No:	
Voucher Year:		FRB Dist Design:	

Payroll Interface Information page

FTS Indicator Select if the phone number is an FTS number.

FRB Company ID No If necessary, enter FRB information.
(FRB company ID number), **FRB Location ID No** (FRB location ID number), **FRB Acct No** (FRB account number), **FRB Branch No** (FRB branch number), and **FRB Dist Desig** (FRB district designation)

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook

Defining Establishments

To define establishments, use the Establishment component (ESTABLISHMENT_DATA) and Controlled Establishment Summary component (CONTROLLED_ESTABS). Use the ESTABLISHMENT_DATA component interface to load data into the tables for the Establishment component.

This section provides an overview of establishments and discusses how to:

- Create an information profile for a business establishment.
- Set up establishment phone numbers.

Understanding Establishments

You use the Establishment component to define distinct physical places of business (establishments) within your company, to enter address information, and to enter regulatory reporting information. In PeopleSoft Human Resources, you define establishments that are consistent with the regulatory requirements of your business operations.

In PeopleSoft Human Resources, an establishment:

- Has an address.
- Is associated with a company.
- Is used for regulatory purposes.

An establishment isn't necessarily a single building or location; it could be an entire industrial or office complex, but it is usually a physical place for which information is reported as a consolidated unit.

Two examples of how establishments are used:

- Occupational Illness and Injury Record keeping (OSHA 200) and Equal Employment Opportunity/Affirmative Action reporting in the United States.
- Social Security and business statistical reporting in France.

Note. (USA) To support AAP reporting, locations and establishments can have a many to many relationship. Set up the relationship between establishments to locations on the Location Profile page (LOCATION_TBL2_GBL). Only establishments that are effective as of the location's effective date are available on the Location Profile page. View the locations associated with an establishment on the Establishment Address page.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

Pages Used to Define Establishments

Page Name	Definition Name	Navigation	Usage
Establishment Address	ESTAB_TBL1_GBL	• Set Up HRMS, Foundation Tables, Organization, Establishment, Establishment Address • Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Reqmts Data, Establishments, Establishment Address	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.
Phone Numbers	ESTAB_TBL2_GBL	• Set Up HRMS, Foundation Tables, Organization, Establishment, Phone Numbers • Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Reqmts Data, Establishments, Phone Numbers	Enter the establishment's telephone, fax machine, and other related numbers.
Controlled Establishment Sumry	CONTROLLED_ESTABS	Set Up HRMS, Foundation Tables, Organization, Controlled Establishment Sumry, Controlled Establishment Sumry	Shows all establishments that have designated the selected Headquarters Unit as their Controlling Establishment.

Creating an Information Profile for a Business Establishment

Access the Establishment Address page (Set Up HRMS, Foundation Tables, Organization, Establishment, Establishment Address or Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Reqmts Data, Establishments, Establishment Address).

Establishment Address

Phone Numbers

Establishment ID: 24200

Establishment Address

Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1990

*Status: Active

*Description: Accord State Univ

Short Desc:

*Reg Region: USA

United States

☐ Headquarters Unit

Company: PSU

PeopleSoft University

Country: USA

United States

Address: 4213 University Terrace
Nelson, NY 34545
Nelson

Edit Address

Spain

Insurance Company Code:

Social Security Company Numbers

Customize | Find | View All | First 1 of 1 Last

	*SSN Employer	Scheme ID	SSN ER Type	Main	IA Code	Days Type	Reduction ID	Eligibility Effective Date	
1				☐					+ -

Establishment Address page (1 of 4)

 France

SIREN Code: ☒ TDS Declared Establishment

Closure Date: 

NIC Code: Declared Establishment:

APE Code: 

CRAM Fund ID: 

Labor Agreement: 

Bank ID: 

Counter#/Acct#/RIB Key:

Transport Rate:

Transport Rate Date: 

Additional Transport Rate:

Additional Transport Rate Date: 

URSSAF Code:  ☒ Annual Report Declaration

URSSAF Nbr:

ASSEDIC Nbr:

Mandatory Base Scheme: 

Tax on Salary Liability: 

Establishment Activity:

Medical Organization Code: 

FONGECIF Code: 

Establishment Address page (2 of 4)

Establishment Fund Membership

Customize | Find | First 1 of 1 Last

Membership Number	Description	Institution Nbr	Description	Fund Code	Description
1	Membership Number				

Establishment Risk

Find | View All | First 1 of 1 Last

*Risk Code

AT

SECTION

Code AT

Standard Rate

00

+

-

Mexico

Building:

Guide Number:

IMSS Zone:

IMSS Subzone:

IMSS Sector:

Risk Factor:

Wage Zone:

USA

Section B

North Amer Ind Class Sys:

SIC:

EEO Unit Number:

Vets 100 Unit Number:

Controlling Establishment ID:

Controlled Establishments

Section C

☐ EEO-1 Minimum 100 Employees

☐ EEO-1 Filed Previous Year

☐ EEO-1 Company Affiliated

Dun and Bradstreet Number:

*EEO-1 Govt Contractor Type:

Section D

☐ Employ Apprentices

Establishment Address page (3 of 4)

Section E

Location same as last year:

☒ Yes

☐ No

☐ No report last year

Major business activity:
same as last year:

☒ Yes

☐ No

☐ No report last year

Estab major business activity:

Section G

Certifying Official:

☐ Copy Details from Headquarters

Title:

Name:

Telephone:

Fax Number:

Email Address:

Location

As of Date:

01/01/1990

Locations

Customize

Find

View All

First

1 of 1

Last

Set ID	Location Code	Description
1 PSUSI	PACSU	Accord State University,Campus

[Go To Locations](#)

Establishment Address page (4 of 4)

Headquarters Unit

Select if the establishment that you're defining is your headquarters. Designate at least one establishment in your company as the headquarters.

(ESP) Spain

Insurance Company Code

Select the code of the insurance company that represents the establishment (work center) in work-related injuries. These codes are maintained on the Insurance Company page (INSUR_COMP_CD_ESP).

SSN Employer

Enter the social security number as assigned by the Spanish government.

Scheme ID

Select the scheme id.

SSN ER Type (social security number employer type)

Select the SSN type— *Apprentice*, *Regular* , or *Training* —based on the type of contract you have with your employees.

Main	Select if the entry in the SSN Employer field is the main number for this establishment (work center). One work center can have more than one employer social security number.
IA Code (industry activity code)	Enter the IA code, which is maintained on the Industry Activity page (INDSTRY_ACT_CD_ESP).
Days Type	Select the Days type from the available options.
Reduction ID	Select the Reduction ID from the available options.
Eligibility Effective Date	Enter the effective date of eligibility.

(FRA) France

NIC Code (<i>Numero Interne de Classement</i> code). (Internal Number of Filing)	Enter the NIC code for the establishment. NIC numbers identify the entities that are inside the same enterprise.

Note. The SIRET number (*Système Informatique pour le Répertoire des Établissements*, or Electronic List of Entities) is an identifying number that is given to a French business by the INSEE (*Institut National de la Statistique et des Études Économiques*, or National Institute of Statistics and Economics Information). INSEE is an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers and is used by the tax and social security authorities to identify a business enterprise and its entities.

CRAM Fund ID (<i>Caisse Regionale d'Assurance Maladie</i> fund ID)	Select a CRAM fund ID. CRAM is the regional social body that deals with the prevention of and compensation for industrial injuries. The CRAM office oversees the local CPAM (<i>Caisse Primaire d'Assurance Maladie</i>) offices that manage occupational health care coverage.
Counter#/Acct #/RIB Key (counter number/account number/RIB key)	Enter the Counter#/Acct #/RIB Key information.
Transport Rate	Enter the transport rate. The transport rate is a statutory deduction. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. The region uses this deduction to subsidize transportation and maintain and build roads. PeopleSoft Enterprise Global Payroll uses the transport rate that you enter here.
Transport Rate Date	Enter the date of the last update to the Transport Rate. This date is reported in the DUCS report provided in PeopleSoft Enterprise Global Payroll for France.
Additional Transport Rate	Enter the additional transport rate if applicable. The transport rate is a statutory deduction and is defined by local regulations. PeopleSoft Enterprise Global Payroll for France uses the additional transport rate that you enter here.

Additional Transport Rate Date	Enter the date of the last update to the Additional Transport Rate. This date is reported in the DUCS report provided in PeopleSoft Enterprise Global Payroll for France.
URSSAF Code (Union de Recouvrement de la Securite Social et des Allocations Familiales code) and URSSAF Nbr (URSSAF number)	Enter an URSSAF code and number. The URSSAF is responsible for ensuring payment of Social Security contributions by all French employers.
Mandatory Base Scheme	Select the Social Security code for DADS.
Tax on Salary Liability	Indicate if the tax on salary liability is complete, partial or if there is no liability to this tax.
Establishment Activity and Medical Organization Code	Enter an establishment activity and select a medical organization code. Medical organization codes are defined on the Medical Organizations page (Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Medical Organizations). These fields are used for Single Hiring Statement reporting. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements</i>, "(FRA) Meeting Regulatory Requirements for France," Running Workforce Reporting Statutory Reports.

Establishment Fund Membership

This scroll area displays details of the pension/contingency funds defined for the establishment on the Pension/Contingency Contracts page. Click the Membership Number link to view the pension/contingency contract definition.

Establishment Risk

Risk Code	Enter the risk code. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.
AT SECTION (<i>Section Accident du Travail</i> section) (Work Accident Section)	System-displayed information that you need to identify the risk code by establishment.
Standard Rate	Enter the standard rate information. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

(MEX) Mexico

Enter the Registros Patronal information required for social security and tax purposes.

Building	Enter the building for your establishment's address.
Guide Number	Enter the number provided by the IMSS authority. The guide number is used as a reference when you submit reports to the IMSS.
IMSS Zone, IMSS Subzone, and IMSS Sector	Select the IMSS zone, subzone, and sector for your establishment's location. The IMSS zone, IMSS subzone and IMSS sector indicate the office where you can make your payments.
Risk Factor	Enter the risk factor that's used for IMSS tax calculation.
Wage Zone	Select the economic zone for your company's location. Wage zones dictate minimum wages. Valid values are <i>A Zone</i> , <i>B Zone</i> , and <i>C Zone</i> .

(USA) USA

Enter information in the following USA-specific sections.

Section B

North Amer Ind Class Sys [North American Industrial Classification System (NCIS)], Controlling Establishment ID, SIC (Standard Industrial Classification), and Vets 100 Unit Number	Enter the NAICS code, controlling establishment ID, SIC code, and Vets 100 unit number, if any apply to this establishment.

Section C

EEO-1 Minimum 100 Employees and EEO-1 Company Affiliated	Select if they apply to this establishment.
EEO-1 Filed Previous Year	Selected by default. If you didn't file an EEO-1 report for this establishment last year, deselect this check box.

Section E

Location same as last year	Select Yes or No to indicate whether your location is the same as last year, or select No Report if you made no report last year.
Major business activity: same as last year	Select Yes or No to indicate whether your business activity is the same as last year; or, select No Report if you made no report last year.

Estab major business activity (establishment's major business activity) Enter a description of the establishment's major business activity. The description is limited to the four lines that appear on the page.

Section G

Certifying Official Select the name of the certifying official.

Copy Details from Headquarters Select to copy details from headquarters.

Location

As of Date Select a date to view which locations are associated with this establishment at a certain point in time.

SetI D, Location Code, andDescription View the location codes associated with this establishment on the Location Profile page.

Go To Locations Click to access the Location component. The system will open the component with the same action you are in on the Establishments component.

When you save or cancel your changes on the Locations component, the system returns you to the Establishment component.

See Also

Chapter 11, "Setting Up Organization Foundation Tables," Establishing Locations, page 283

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

Setting Up Establishment Phone Numbers

Access the Phone Numbers page (Set Up HRMS, Foundation Tables, Organization, Establishment, Phone Numbers or Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Reqmts Data, Establishments, Phone Numbers).

Establishment Address | **Phone Numbers**

Establishment ID: 24200

Establishment Find | View All First 1 of 1 Last

Description: Accord State Univ

Effective Date: 01/01/1990 Status: Active

Phone Numbers Find | View All First 1 of 1 Last

Phone Type: Phone: + -

France

Contact for Establishment: 🔍

Phone Numbers page

Phone Type and **Phone** Enter phone information for this establishment.

(FRA) France

Contact for Establishment Select the contact for this establishment.

Establishing Locations

To establish locations, use the Location (LOCATION_TABLE) and the Location Table Report (RUN_PER705) components. Use the LOCATION_TABLE component interface to load data into the tables for the Location component.

This section provides an overview of locations and discusses how to:

- Enter company locations.
- Set up a location profile.

Understanding Locations

Use the Locations component to establish physical locations in your organization, such as corporate headquarters, branch offices, remote sales offices, and so forth. If you use PeopleSoft Global Payroll, you may want to report certain information by location, so consider this when planning your implementation of this information.

If you use PeopleSoft Pension Administration, you can create one or more locations specifically for pension payees. You can use a single *retiree location* for all retirees if you don't need to report on your payees based on more specific location information.

Various pages in PeopleSoft Human Resources reference the information that you define in the Locations component. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to locations.

Note. (USA) To support AAP reporting, when you select a regulatory region with a country value of USA on the Location Profile page, the system enables you to establish a many to many relationship between locations and establishments. Set up the relationship on the Location Profile page in the USA section of the page. Only establishments that are effective as of the location's effective date are available on the Location Profile page. View the locations associated with an establishment on the Establishment Address page.

Pages Used to Establish Locations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Location Address	LOCATION_TABLE1	- Set Up HRMS, Foundation Tables, Organization, Location, Location Address - Set Up HRMS, Foundation Tables, Organization, Location BRA, Location Address	Enter physical locations in your organization, such as corporate headquarters, branch offices, and remote sales offices.
Business Units by Location	LOC_BU_SEC	Click the Business Units that use this Set ID link on the Location Address page.	View a list of the business units that use this setID.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter phone numbers for the location addresses.
Location Profile	LOCATION_TBL2_GBL	- Set Up HRMS, Foundation Tables, Organization, Location, Location Profile - Set Up HRMS, Foundation Tables, Organization, Location BRA, Location Profile	Specify a salary administration plan for the location, as well as tax, establishments and local country information.
Location Details BRA	LOCATION_TBL_BRA	Set Up HRMS, Foundation Tables, Organization, Location BRA, Location Details BRA	Define details for geographic locations in Brazil.

Page Name	Definition Name	Navigation	Usage
Location Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Location Table Report, Run Control	Run the Location Table report (PER705). This report lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).

Entering Company Locations

Access the Location Address page (Set Up HRMS, Foundation Tables, Organization, Location, Location Address).

The screenshot displays the 'Location Address' page with the following details:

- Set ID:** SHARE
- Location Code:** KCQC00
- Business Units that use this Set ID:** (link)
- Location Address:** (header with Find, View All, First, 1 of 1, Last)
- *Effective Date:** 01/01/1980
- *Status:** Active
- *Description:** Montreal Office
- Short Description:** Montreal
- Building:** (empty field)
- Floor Nbr:** (empty field)
- Language Code:** Can French
- Country:** CAN (Canada)
- Address:** Place Ville Marie, 300 St-Catherine Street, Suite 1100, Montreal QC P3F 2W1
- Edit Address:** (button)
- Phone:** (link)

Location Address page

- Building** Enter the building location, if applicable. For example, your corporate headquarters might be located in building 4 in an office park.
- Floor Nbr** (floor number) Enter the floor number, if applicable.
- Language Code** Select the code for the official language used at this location.
- Phone** Click this link to enter phone numbers.

Setting Up a Location Profile

Access the Location Profile page (Set Up HRMS, Foundation Tables, Organization, Location, Location Profile).

Location Address

Location Profile

Set ID:SHARELocation Code:KCQC00

Location Profile

Find | View All First1 of 1Last

Description:Montreal Office

Effective Date:01/01/1980Status:Active

Salary Default

Set ID:SHAREPlan:

Regulatory Region:CANHoliday Schedule:KC01Canadian Holiday Schedule

Establishment ID:

Payroll for North America

Taxing Locality:

Check Cashing Location:

Canada

Canadian Census Metropol Area:Montreal, Quebec

CEC Management Area:

Geographical Location Code:

Office Type:

Switzerland

Municipality Code:

Location Profile page (1 of 2)

Germany

Tariff:

Tariff Area:

Spokesmen Committee ID:

Industrial Inspection ID:

Mexico

Fonacot ID Number:

FONACOT Office:

☐ Local Tax

Special Local Tax:

Spain

Last Matricula Number Assigned:

United Kingdom

☐ Northern Ireland Reportable

USA

☐ Telework Location

Establishments		Customize Find View All First 1 of 1 Last	
	Establishment ID	Description	
1			+ -

Argentina

Family Allowance Rate:

Location Profile page (2 of 2)

You enter U.S. tax information for Canadian and German locations on this page.

Note. PeopleSoft Payroll for North America references the Tax Location Table for location information, and PeopleSoft Pension Administration references the PeopleSoft Payroll for North America tax information. For more information about the relationship between the Locations component and the Tax Location Table in PeopleSoft Payroll for North America, see the PeopleSoft Payroll for North America documentation.

Set ID and Plan

Select a salary administration plan from the values that you created on the Salary Plan component.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps.

Tying a salary administration plan for a location helps you distinguish currency and cost-of-living differences for workers with the same job code. If you don't need to distinguish salary administration plans by location, leave this field blank.

Note. Select only the plans that are associated with the setID that you selected on the Define Salary Plan component. If you select a salary administration plan on this page, the system uses that plan as the default value on the Job Data pages for the people in this location. Otherwise, it uses the salary administration plan that you enter on the Job Code Table.

See [Chapter 13, "Setting Up Jobs," Classifying Jobs, page 334.](#)

Regulatory Region

Enter the regulatory region that is associated with this location.

Note. (USA) If you select a regulatory region with a country value of USA, the system will hide the Estab ID field. To associate establishments with this location, use the Establishments fields in the USA section of this page.

Holiday Schedule

Select a holiday schedule for this location.

Note. If you use PeopleSoft Payroll for North America, the holiday schedule you select here is the default holiday schedule assigned to workers on the Job Data – Payroll page (JOB_DATA2). If you leave this field blank, the default holiday schedule comes from the Pay Group component.

If you use PeopleSoft Global Payroll, the holiday schedule on this page is for informational purposes only; assigned pay groups control the default holiday schedule for processing.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules, page 233.](#)

Establishment ID

Select an establishment ID to associate with this location.

Note. (USA) If you select a Reg Region value with a country value of USA, the system hides this field. Set up establishments for U.S. locations in the USA section of this page.

Payroll for North America**Taxing Locality and
Check Cashing Location**

Select a taxing locality and check cashing location. This field is for information only.

(CAN) Canada

Canadian Census Metropol Area (Canadian Census Metropolitan Area) Select the Canadian Census Metropolitan Area (CMA) code that is prescribed by Statistics Canada for this location. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required.

CEC Management Area (Canada Employment Center Management Area) Select from the list of options.

Geographical Location Code Enter the geographic location code as defined by Statistics Canada.

Note. (CAN) If the Official Languages Act applies to your organization, use the information in the Geographic Location Code, Office Type, TBS Office Code, and National Capital Region fields as part of the Official Languages reports (PER102CN and PER108CN) that you submit to the Canadian government. If this is a military installation, the geographic location code entered on the first page of the Location MIL component, is copied to the Geographical Location code in the Canada section.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements*, "(CAN) Meeting Regulatory Requirements for Canada."

(CHE) Switzerland

Municipality Code The default value is the municipality code that corresponds to the postal code of the location address. You can select a different code from the list of valid municipality codes for the canton that this location is in.

(DEU) Germany

Tariff Enter the *tariff*, or the type of business conducted at this location, such as banking, retail industry, printing, or wood processing.

Industrial Inspection ID Select the ID for this location from the list of values, if appropriate. Industrial inspection codes are included on Incident and Illness Reports that record the worker accidents and illnesses incurred on the job in the Monitor Health and Safety business process.

Note. When you enter a person's location on the Job Data pages, the Tariff and Tariff Area values appear by default from the Locations component, based on the values that you entered on this component for the location.

When you enter a person's location and labor type on the Job Data pages, the system populates the Spokesman Committee ID and Works Council ID fields. These values are based on the person's location in the Work Location page (JOB_DATA1) and the value of the Labor Type (*Management* or *Non-Management*) in the Job Labor page (JOB_LABOR).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration*, "Requesting Works Councils Approval."

(MEX) Mexico

Fonacot ID Number	Enter the FONACOT ID for your location. FONACOT is a consumer fund for employees.
FONACOT Office	Identify the nearest FONACOT office for your location.
Tax Local	Select this check box if the location of the state is Chihuahua.
Special Local Tax	If the location of the state is Chihuahua this field will default to Ciudad Juarez.

(ESP) Spain

Last Matricula Number Assigned	The Spanish government requires employers to assign each people a unique matricula number, which is used for government reporting. To avoid duplication of numbers, this field updates and stores the last matricula number assigned.

(GBR) United Kingdom

Northern Ireland Reportable	Select if this is a Northern Ireland reportable location. Indicates that people in this location are to be included in the community background report (Fair Employment Monitoring Return) that is provided for Northern Ireland.

USA

Telework Location	Select if this establishment allows workers to work remotely.

Establishments

Select one or more establishment IDs for this location.

Use the establishment-location relationship for affirmative action planning, EEO (Equal Employment Opportunity), OSHA (Occupational Safety and Health Administration), and other U.S. federal reporting regulations.

Only establishments with an effective date as of the location's effective date are available.

Assign locations and establishments to people on the Job Data - Work Location page. The system will only enable you to select an establishment associated with the location you select.

Note. If an establishment's Description is blank, the establishment has become inactive since you initially assigned it to this location.

Note. You can view the locations associated with an establishment on the Establishment Address page.

(ARG) Argentina

Family Allowance Rate Select the family allowance rate from these values: *General*, *Zone 1*, *Zone 2*, *Zone 3* and *Zone 4*.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook

Establishing Military Locations

To establish military locations, use the Geographic Location MIL (GVT_LOCATION_TBL) and Location MIL (LOCATION_TABLE_MIL) components.

This section discusses how to:

- Define military geographic locations.
- Establish a military locations.

Pages Used to Establish Military Locations

Page Name	Definition Name	Navigation	Usage
Geographic Location MIL	GVT_LOCATION	Set Up HRMS, Foundation Tables, Organization, Geographic Location MIL, Geographic Location MIL	Define geographic locations.
Location MIL - Location Address	LOCATION_TABLE_MIL	Set Up HRMS, Foundation Tables, Organization, Location MIL, Location Address	Enter military locations and associate them to geographic locations.

Defining Military Geographic Locations

Access the Geographic Location MIL page (Set Up HRMS, Foundation Tables, Organization, Geographic Location MIL, Geographic Location).

Geographic Location MIL

Geog Location Code: 152400003

Geographic Location Find | View All First 1 of 2 Last

*Effective Date: 08/04/2009 *Status: Active

City Code/Name: 2400 HONOLULU

County Code/Name: 003 Honolulu

State/Country Code: 15 Hawaii

Postal Codes: HI USA

CBSA: 3320

CSA:

*Locality Pay Area: 99 Not in a Locality Area

*LEO Special Pay Area: 0 Non LEO Area

Locality Pay Percentages

Locality Percentage:	0.00	IGA Percentage:	0.00	LEO Percentage:	0.00

Geographic Location MIL page

City Code/Name The system assigns a city code. Enter the city name.

CBSA (core based statistical area)	This value is supplied by the OPM data file. It is blank if the duty station is not in a CBSA. This field is labeled MSA for effective dates before February 2, 2005.
CSA (combined statistical area)	This value is supplied by the OPM data file. It is blank if the duty station is not in a CSA. This field is labeled CMSA for effective dates before February 2, 2005.

Entering Military Locations

Access the Location MIL - Location Address page (Set Up HRMS, Foundation Tables, Organization, Location MIL, Location Address).

Location Address

Location Profile

Set ID: SHARE

Location Code: KUMILUS08

[Business Units that use this Set ID](#)

Location Address

Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1980

*Status: Active

*Description: Honolulu, HI

Short Description: Honolulu

Building: Floor Nbr:

Language Code: English

Geoloc Cd: 152400003

HONOLULU HI

Country: USA

United States

Address: Honolulu, HI 96801

Honolulu

Edit Address

Phone

Location MIL - Location Address page

Geoloc Cd (geographic location code) Select the geographical location code.

See [Chapter 11, "Setting Up Organization Foundation Tables," Entering Company Locations, page 285.](#)

(USF) Establishing Federal Locations

To establish Federal locations, use the Locality Pay Area Table USF component (GVT_LOCPAY_AREA_TB), the Geographic Location component (GVT_LOCATION_TBL), the Location USF component (LOCATION_TABLE), the Work Location Table component (RUN_FGPER817), the Geographic Location component (RUN_FGPER802), and the Locality Pay Area Rpt USF (RUN_FGPER807).

This section provides an overview of federal locations and discusses how to:

- Define regions for people who receive additional pay.
- Define geographic locations.
- Add work locations.

Understanding Federal Locations

Use the Locations USF component to establish physical locations within your organization, such as agency headquarters, branch offices, regional offices, and so forth.

Various pages in PeopleSoft Human Resources reference the information that you define in the Locations USF component. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to specific locations.

(USF) Pages Used to Establish Locations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Locality Pay Area Table	GVT_LOCAREA_TABLE	Set Up HRMS, Product Related, Compensation, Locality Pay Area Table USF, Locality Pay Area Table	Define the regions where federal workers receive additional pay above their base pay.
Geographic Location	GVT_LOCATION	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Geographic Location, Geographic Location	Define geographic locations.
Location Address	GVT_LOC_TABLE1	Set Up HRMS, Foundation Tables, Organization, Location USF, Location Address	Add work locations.

Page Name	Definition Name	Navigation	Usage
Run Control	PRCSRUNCNTL	- Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Work Location Table - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Geographic Location - Set Up HRMS, Product Related, Compensation, Locality Pay Area Rpt USF	Use this page to run these reports: - Work Location Table report (FGPER817) prints a detailing of the Work Location Table. - Geographic Location Table report (FGPER802) produces a detailing of the Geographic Location Table. - Locality Pay Area Table report (FGPER807) prints information for every Locality Pay Area.

Defining Regions for Employees Who Receive Additional Pay

Access the Locality Pay Area Table page (Set Up HRMS, Product Related, Compensation, Locality Pay Area Table USF, Locality Pay Area Table).

Locality Pay Area Table

Locality Pay Area: 17

Locality Pay Area								Customize Find View All  First 1-7 of 10 Last	
	*Effective Date	*Status	*Description	Locality Percentage	IGA Percentage				
1	02/01/2005 	Inactiv 	Dallas-Fort Worth	15.07	0.00				
2	01/11/2004 	Active 	Dallas-Fort Worth	13.85	0.00				
3	01/02/2000 	Active 	Dallas-Fort Worth	8.59	0.00				
4	01/01/1999 	Active 	Dallas-Fort Worth	7.47	0.00				
5	01/03/1998 	Active 	Dallas-Fort Worth	6.90	0.00				
6	01/05/1997 	Active 	Dallas-Fort Worth	6.40	0.00				
7	01/07/1996 	Active 	Dallas-Fort Worth	6.23	0.00				

Locality Pay Area Table page

Federal employees in certain regions receive additional pay above their base pay. PeopleSoft delivers this data, but you might need to change it based on Office of Personnel Management updates.

Effective Date	The first time you set up this table, select an effective date that is early enough to accommodate your organization's oldest historical information.
Status	Select a status.
	Note. Add data rows and use the scroll bar, the Effective Date field, and the Status field to maintain history data for information that changes over time. For example, to retire a Locality Pay Area, insert an effective-dated row with a status of <i>Inactive</i>.
Locality Percentage	Enter the percentage of base pay employees in this region receive above their base pay, which is set by their pay plan, grade, and step. The amount appears on the person's Compensation page (JOB_DATA3) in Administer Workforce.

Defining Geographic Locations

Access the Geographic Location page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Geographic Location, Geographic Location).

Geographic Location

Geog Location Code: 010000003

Geographic Location Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

City Code/Name: 0000 BALDWIN

County Code/Name: 003 Baldwin Postal Codes: AL USA

State/Country Code: 01 Alabama

MSA: 5160

CMSA:

*Locality Pay Area: 88 Rest Of Contiguous U.S.

*LEO Special Pay Area: 0 Non LEO Area

Locality Pay Percentages			
Locality Percentage:	0.00	IGA Percentage:	0.00
		LEO Percentage:	0.00

Geographic Location page

City Code/Name	The system assigns a city code. Enter the city name.

Locality Pay Area and **LEO Special Pay Area**
(law enforcement officer special pay area)

Note. PeopleSoft Payroll for North America references the Tax Location Table for location information.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook

Adding Work Locations

Access the Location Address page (Set Up HRMS, Foundation Tables, Organization, Location USF, Location Address).

Location Address

Set ID: FEDPSLocation Code: F0001

Work Location Table

Find | View All | First1 of 1Last

*Effective Date:01/01/1980

*Status:Active

*Description:National Office

Short Desc:Nat. Off.

Building:MAIN BLD

Geoloc Cd:110010001

Designated Agt:7441

Country:USAUnited States

Address:1111 Constitution Avenue, NW
Room 1213 HQ:HR
Washington, DC 20224

Telework Location

Edit Address

Location Address page

Building

Enter the building where the location is, if applicable. For example, your national office might be located in the main building of your complex.

Geoloc Cd (geographic location code)

Select the geographical location code.

Designated Agt (designated agent)

Select the designated agent code.

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Country	Select a country from the list of values and move out of the field. The system displays the appropriate address fields for the country that you selected, using the standard address format that you have set up in the Country Table.
Telework Location	Select if this location allows workers to work remotely.

Setting Up Company Locations

To set up company locations, use the Company Location component (COMP_LOC_TBL).

This section discusses how to establish company locations.

Pages Used to Set Up Company Locations

Page Name	Definition Name	Navigation	Usage
Company Location	COMP_LOC_TBL	Set Up HRMS, Foundation Tables, Organization, Company Location, Company Location	Associate Works Council IDs with companies and locations.

Establishing Company Locations

Access the Company Location page (Set Up HRMS, Foundation Tables, Organization, Company Location, Company Location).

Company Location

Company: GD3

Set ID: DEU01 German Payroll Company 3

Location Code: KD915 Zweigstelle Brandenburg

Company Location Find | View All | First | 1 of 1 | Last

Effective Date: 01/01/1980

Works Council ID: KDWC00915 Works Council Berlin

Germany

Spokesmen Committee ID:

Social Insurance Unit:

Company Location page

Works Council ID Select the ID of the Works Council representing workers at this company and location.

(DEU) Germany

Spokesmen Committee ID Select the works council spokesmen committee ID.

Social Insurance Unit Select a social insurance ID.

Maintaining Departments

To maintain departments, use the Departments component (DEPARTMENT_TBL) and the Department Table Report component (RUN_PER701). Use the DEPARTMENT_TBL component interface to load data into the tables for this component.

This section provides an overview of departments and discusses how to:

- Define basic information about a department.
- Enable and control department information for specified customers.

Understanding Departments

After you define company and location data for your enterprise, use the Departments component to define business entities in your organization. If you're using PeopleSoft Payroll for North America or PeopleSoft Global Payroll, you must set up department codes according to your cost centers where you charge wages. If you use PeopleSoft Pension Administration, you need departments to house your pension payees. You can use a single department for all your pension payees, or you can organize your payees using a department scheme that meets your reporting needs. Otherwise, you can set up departments using any groupings you like.

PeopleSoft Human Resources offers two ways to access the Departments component to define and view departments:

- From the Set Up HRMS menu.
- From PeopleSoft Tree Manager.

This section discusses how to use the Departments component from within the Set Up HRMS menu.

Using Departments for Data Permission Security

PeopleSoft enables you to create a security hierarchy using PeopleSoft Tree Manager and use it to grant or deny users to person data, based on the department a person belongs to. If you decide to use a Department Security tree to control data access, you must attach each department you create, whether from the Set Up HRMS menu or Tree Manager, to an effective Department Security Tree.

PeopleSoft HRMS also enables you to use other fields for data permission security.

See Also

Chapter 5, "Setting Up and Administering HRMS Security," page 39

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Pages Used to Maintain and Report on Departments

Page Name	Definition Name	Navigation	Usage
Department Profile	DEPARTMENT_TBL_GBL	Set Up HRMS, Foundation Tables, Organization, Departments, Department Profile	Define basic information about a department. For Payroll for North America: Use department IDs for accounting purposes, such as charging earnings to a department or implementing labor distribution accounting. The system uses department IDs when you sequence pay sheets and paychecks by department.
Comm. Acctg. and EG (department table - commitment accounting and education and government)	DEPARTMENT_TBL_CA	Set Up HRMS, Foundation Tables, Organization, Departments, Comm. Acctg. and EG	Enable and control department information that is specific to Education and Government customers and customers who use the Commitment Accounting feature.
Department Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Department Table Report, Run Control	Use this page to run the Department Table report (PER701) that lists all departments by Department ID.

Defining Basic Information About a Department

Access the Department Profile page (Set Up HRMS, Foundation Tables, Organization, Departments, Department Profile).

Department Profile

Comm. Acctg. and EG

Set ID: SHARE

Department: 10000

[Business Units that use this Set ID](#)

Department Profile

[Find](#) | [View All](#) | [First](#) 1 of 1 [Last](#)

*Effective Date:

03/27/2009

*Status:

Active

*Description:

Human Resources

*Short Description:

HR

Location Set ID:

SHARE

Table Set shared across Corp

Location:

KUNY00

Corporation Headquarters

Company:

GBI

Global Business Institute 9999

Manager Type

☐ None

☒ EmplID

Manager ID:

KU0005

Reza Aliverdi

☐ Position

Manager Position:

Empl ID:

Budget Year End Date:

*Budget Level:

Department

Payroll for North America

Tax Location:

Department Profile page (1 of 3)

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301

Belgium	
Industrial Committee:	
NACE Code:	
Canada	
Industrial Sector:	
NAICS Code:	
Stats-Can Department Code:	
Stats-Can Faculty Code:	
Germany	
Tax Location Code:	
Accident Insurance:	
Hazard:	
Social Insurance Accident Nbr:	
France	
Establishment ID:	
Risk Code:	
AT SECTION:	
USA	
EE04 Function:	Financ Adm

Department Profile page (2 of 3)

New Zealand	
Classification Unit:	
Australia	
Higher Education	
Organizational Unit:	
Work Sector:	
Australian Public Service	
Agency Code:	
Mexico	
Cost Center:	610000
Argentina	
Cost Center:	610000

Department Profile page (3 of 3)

Effective Date

If you add a new department to the Departments component from the Set Up HRMS menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Description	For Payroll for North America: If you use the department specified on the employee's Job record to indicate where to deliver checks, the system automatically prints the department description and code on the check.
Location Set ID and Location	To associate a department with a physical location, select the location. Maintain these values in the Locations component.
Company	Indicate the company to which this department belongs. The system uses the Company field value as the default company location on the job records for all people associated with this department. If you add a person to this department, the system assumes that they are also with the designated company. If you don't enter a company here, you can enter it on the Job Data pages. If you do enter a company here, you can't change it on the Job Data pages. Note. If yours is a multicompany environment and you want more than one company to share the department, leave the <i>Company</i> field blank.
Manager Type	
If you are not specifying managers for departments, select <i>None</i>. If you are specifying managers, indicated if the manager is a person (<i>EmplID</i>) or a position (<i>Position</i>). If you use partial position management, where you use positions for only a portion of your organization, select whichever option is appropriate for this department.	
Manager ID	If you selected <i>EmplID</i> , the system makes this field available for you to select the ID of the manager. The manager ID that you select becomes the default supervisor ID on the Job records of all people who are assigned to this department. If you have more layers in your organization, override the default.
Manager Position	If you selected <i>Position</i>, and you have created positions for this department, select a Manager Position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data. The system displays the name and EmplID of the current position incumbent in the EmplID field. Note. The system allows you to select any position. To have the system prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Designer so that the prompt table for this field is DEPT_POSITIONS.
Budget Year End Date	If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.
Budget Level	Select <i>Department</i> , <i>Job Code</i> , <i>Line Item</i> , <i>Position Number</i> , or <i>None</i> to define budgeting for this department.

Payroll for North America

Tax Location Specify the tax jurisdiction for the department. The code that you enter populates the Tax Distribution pages (TAX_DISTRIBUTION or TAX_DIST_CAN) of employees of this department. You can override this information for individual employees.

(BEL) Belgium

Industrial Committee Select the industrial committee for the company. This can be overwritten at the department level if necessary.

NACE Code Enter the NACE code for the company.

Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

Industrial Sector The North American Industrial Classification System (NAICS) is a common framework for the production of comparable industry statistics for Canada, Mexico and the United States. Its hierarchical structure is composed of sectors (two-digit codes), subsectors (three-digit codes), industry groups (four-digit codes), and industries (five-digit codes). At each level of the hierarchy, additional digits are appended to those from the previous level. For example, the NAICS-2007 sector code for health care is 62, so all of the subsector, industry group, and industry codes for healthcare begin with 62.

Use the Canadian Industrial Sector field to select the two-digit sector code for the department. Sectors with a large number of industries have multiple sector codes. Although there is no difference between the codes at the sector level, the best practice is to select the code with the correct digits for the department's industry. For example, although you can use 31, 32, or 33 for the Manufacturing sector, if you are a clothing manufacturer with an industry group of 3151, you should select 31 as the sector code.

Codes are effective-dated so that you can easily update this field when new codes are published. For example, the NAICS-2007 codes became effective on January 1, 2007 and are available for entry only in rows with effective dates on or after that date.

NAICS Code Enter the four-digit NAICS code for the department's industry group. The NAICS code is used for Canadian employment equity reporting purposes and appears in the Employment Equity Report (PER101CN).

When new NAICS codes are published, create a new effective-dated row to capture any changes to a department's industry group code.

**(E&G) Stats-Can-
Department Code**
(Statistics Canada
department code)

Enter a 3-character code to be reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

**(E&G) Stats-Can
Faculty Code** (Statistics
Canada faculty code)

Select a code to associate a faculty with a department. Faculty codes are set up in the StatsCan Faculty Code table and are used to associate medical and dental categories with faculties. The system uses the faculty code that is associated with this department to determine the medical and dental categories that are reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Track Faculty Events*, "(CAN) Working with the Statistics Canada Academic Teaching Surveys Process."

(DEU) Germany

Tax Location Code

Select a code.

Note. For more information about how tax location codes affect payroll processing for North America, see your PeopleSoft Payroll for North America documentation.

Note. The Accident Insurance, Hazard, and Social Insurance Accident # fields are used to monitor Health and Safety business process functionality in PeopleSoft Human Resources.

(FRA) France

Establishment ID

Select an establishment ID for this department. French Social Security defines a risk code for your establishment, based on the number of work accidents that have occurred in the past three years in a particular establishment. Your establishment must contribute to a Work Accident fund, based on the number of work accidents that occur in your establishment; the more accidents you have, the more you pay into the fund.

This field is required for Global Payroll for France. The system will default this value into a worker's Job record when you use PeopleSoft Human Resources: Manage Positions.

Risk Code

Select a risk code from the list of risk codes. You define your organization's percentage of contributions to the French Social Security fund at the department level, based on the risk code that you enter.

AT SECTION

Select the AT section for the risk code selected in the Risk Code field. Risk Code / AT sections are defined for establishments. When there are several AT sections defined for the establishment, use this field to specify the AT section to use.

(USA) USA

EEO4 Function (Equal Employment Opportunity 04 function) Select the functional category, such as health or fire protection, that applies to this department. The option that you select affects your EEO reporting to the U.S. federal government.

(NZL) New Zealand

Classification Unit Enter the classification unit for your company. This information comes from the Classification Unit Table. The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

(AUS) Australia

These fields appear only if you selected the Education & Government check box on Country Specific page of the Installation component.

Organizational Unit Enter the appropriate Higher Education organizational unit code.

Agency Code Enter the four-digit Australian Public Service code for this department.

(MEX and ARG) Mexico and Argentina

Cost Center Identify the cost center for this department.

Enabling and Controlling Department Information for Specified Customers

Access the Comm. Acctg. and EG page (Set Up HRMS, Foundation Tables, Organization, Departments, Comm. Acctg. and EG).

Department Profile Comm. Acctg. and EG

Set ID: QEID Department: QBD01

Commitment Accounting and EG Find | View All First 1 of 1 Last

Effective Date: 01/01/1990 Status: Active

*FTE Edit Indicator: No Edit

Tenure Processing

☐ Can Grant Tenure

Commitment Accounting

☒ Use Comm Acctg / Budgeting *Budget with Department: QBD01

☐ Use Encumbrance Processing ☐ Use Actuals Distribution

Real Time Budget Check

*Process Option: Batch Process Only

☐ Automatic Budget Check

☐ Use TL Distribution

Comm. Acctg. and EG page

FTE Edit Indicator (full-time equivalency edit indicator) Select whether you want the system to display a warning or an error message when you exceed the FTE maximums for this department. If you don't want the system to perform an FTE edit for this department, select *No Edit*.

Tenure Processing

Can Grant Tenure Select to be able to grant tenure to qualified people in this department.

Commitment Accounting

Use Comm. Acctg / Budgeting (use commitment accounting / budgeting) Select if you use Commitment Accounting processing for this department. When you select this check box, the other page elements in this group box become available for entry.

Budget with Department An accumulated budget for a group of departments rolls up to the department that you enter.

The department that you enter must be in the same SetID as the department that you are defining, and it must be higher on the security tree. For example, if departments 00010 and 00012 are lower on the security tree than department 00005 and they have the same SetID, then departments 00010 and 00012 can budget with department 00005. The budgets for 00010 and 00012 roll up into a single budget with 00005.

See [Chapter 5, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 81.](#)

Use Encumbrance Processing Select if you use Commitment Accounting encumbrance processing for this department.

Use Actuals Distribution Select if you use Commitment Accounting's Actuals Distribution process for this department.

Real Time Budget Check

Process Option Choose how to process job data and position data changes that can affect encumbrance calculations.

Certain processing options result in different actions depending on whether the job data or position data change is considered critical. Critical changes in the Job Data component include hiring, rehiring, and adding a concurrent job. Critical changes in the Position Data component include creating a position, increasing the head count for a position, changing a position from inactive to active, and changing the Pre-Encumbrance Indicator for a position from *None* or *Requisition* to *Immediate*,

The following table describes your processing option choices:

<i>Process Option</i>	<i>Critical Changes</i>	<i>Non-Critical Changes</i>
<i>All</i>	Allows immediate budget checking from the Job Data and Position Data components.	Allows immediate budget checking from the Job Data and Position Data components.
<i>Batch Process Only</i>	Do not allow real-time budget checking. All encumbrance calculations are performed by the batch process. The individual budget check status is set to <i>Pending</i> .	Do not allow real-time budget checking. All encumbrance calculations are performed by the batch process. The individual budget check status is set to <i>Pending</i> .
<i>Critical</i>	Allows immediate budget checking from the Job Data and Position Data components.	Do not allow immediate budget checking from the Job Data and Position Data components. Encumbrance calculations are performed by the batch process or individual budget checks from the Real-time Budget Checking components. The individual budget check status is set to <i>Pending</i> .
<i>Deferred</i>	Do not allow immediate budget checking from the Job Data and Position Data components. Encumbrance calculations are performed by the batch process or individual budget checks from the Real-time Budget Checking components. The individual budget check status is set to <i>Pending</i> .	Do not allow immediate budget checking from the Job Data and Position Data components. Encumbrance calculations are performed by the batch process or individual budget checks from the Real-time Budget Checking components. The individual budget check status is set to <i>Pending</i> .

Automatic Budget Check

This check box is available only if the selected Process Option is *All* or *Critical*.

Select this check box if you want the system to immediately perform a real-time budget check when a user attempts to save a change to job data or position data.

Deselect this check box if you want the system to present a pop-up window when a user attempts to save a change to job data or position data. The pop-up window gives the user the choice of performing the budget check immediately or saving the transaction without performing the budget check. If the user bypasses the budget check, the system generates a transaction that can be processed from the Budget Check by Job page or the Budget Check by Position page.

Additional Page Element**Use TL Distribution**

Select to take into account the task information that is entered into PeopleSoft Time and Labor during Commitment Accounting's Actuals Distribution process. This check box applies only to PeopleSoft Time and Labor customers.

If you select this check box, the Actuals Distribution process creates an entry for each Time and Labor task entry. It then distributes the earnings in the appropriate ratio (the same ratio that is used for Labor Distribution).

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Track Faculty Events, "Setting Up Track Faculty Tenure," Setting Up Tenure Tracking

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Commitment Accounting, "Defining Fiscal Year Budgets"

Running an SQR Audit to Cross-Check Departments

When you add new departments to the Departments component, also add them to your security tree so that they are a part of your security structure. After you build your security tree, you can run a SQR audit (PER506) to determine which department IDs are in the Departments component but not in the security tree. This SQR also lists the departments that are in the security tree but not in the Departments component. The latter situation can occur if you delete a department from the system and don't remove the node from your security tree.

The procedures for running SQRs vary with your application environment. If you aren't sure of your standard procedures, ask your system administrator.

(USF) Setting Up Federal Departments

To set up Federal departments, use the Departments USF component (DEPARTMENT_TBL).

This section discusses how to:

- Set up departments.
- Run an SQR audit to cross-check departments.

Page Used to Set Up Federal Departments

Note. The Department Profile and Comm. Acctg. and EG pages in the Departments USF component are identical to those in the Departments component and share the same object names.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Department Table	GVT_DEPART_TBL_USA	Set Up HRMS, Foundation Tables, Organization, Departments USF, Department Table	Set up departments.

Setting Up Departments

Access the Department Table page (Set Up HRMS, Foundation Tables, Organization, Departments USF, Department Table).

Department Table		Comm. Acctg. and EG	
Set ID:	FEDPS	Department:	F000020
Department Profile Find View All First 1 of 4 Last			
*Effective Date:	08/04/2009	*Status:	Active
Description:	Office of the Chief Information Officer		Short Description: CIO
Location Set ID:	FEDPS	Federal PS Business Unit	
Location:	F0001	National Office	
Company:	FRG	Federal Reserve Board	
Sub-Agency:	ZZ	Internal Research Depart-NR	
Manager Type ☒ None ☐ EmplID Manager ID: ☐ Position Manager Position: Empl ID:			
Budget Year End Date:	930	*Budget Level:	Position
Payroll for North America Tax Location: F0001 National Office			
USA EE04 Function: Not Countd			

Department Table page

Effective Date

Important! \If you add a new department to this Departments USF component from the Set Up HRMS menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Sub-Agency

Select the sub-agency to which this department belongs.

Note. The system uses the Company and Sub-Agency fields as the default agency/sub-agency location on the Job records for all people who are associated with this department. If you hire employees into this department, the system assumes that they are also employees of the designated agency/sub-agency. If you don't enter an agency here, you can enter it on the Job Data pages. If you do enter an agency here, you can't change it on the Job Data pages.

Manager ID

The manager ID that you select becomes the default supervisor ID on the employee records of all employees who are assigned to this department. If you have more layers in your organization, override the default.

Manager Position	If you use position management, and you create positions for this department, you can select a manager position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data. When you select a manager position number, the system displays whether an employee is assigned to the manager position. Note. You can select any position in this field. To have the system to prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Designer so that the prompt table for this field is DEPT_POSITIONS. If you use partial position management, where you use positions for only a portion of your organization, you can use either the Manager ID number or the Manager Position number. When you select either field, the system disables the remaining field.
Budget Year End Date	If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.
Budget Level	Select <i>Department</i> , <i>Job Code</i> , <i>Line Item</i> , <i>Position Number</i> , or <i>None</i> to define budgeting for this department.

(USA) USA

EEO4 Function	Select the functional category, such as health or fire protection, that applies to this department. The option you select affects your EEO reporting.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook

Setting Up Primary Permission List Preferences

To set up primary permission list preferences, use the Org Defaults by Permission Lst component (OPR_DEF_TBL_HR).

This section provides an overview of primary permission list preferences and discusses how to:

- Set tableset sharing defaults.
- Set payroll system defaults.

Understanding Primary Permission List Preferences

You use the Org Defaults by Permission Lst component to set predefined TableSet sharing and system-wide defaults and settings for each of your primary permission lists. Primary permission lists are assigned to the user on the User Profile - General page (USER_GENERAL). The system will default in the values you indicate for a particular permission list on the Org Defaults by Permission Lst component, such as Business Unit, SetID, Currency, Country, and/or Company Code when a user who is associated with that permission list logs in to PeopleSoft HRMS. Primary permission lists also control user access to country functionality, as determined on the Setup Global Security page (SCRTY_TBL_GBL)).

See Also

[Chapter 5, "Setting Up and Administering HRMS Security," Setting Up Security for Local Functionality, page 124](#)

Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Permission Lists"

Pages Used to Set Defaults for Permission Lists

Page Name	Definition Name	Navigation	Usage
Org Defaults by Permission Lst - Defaults	OPR_DEF_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst, Defaults	Set predefined TableSet sharing and system-wide defaults for each of your primary permission lists.
Org Defaults by Permission Lst - Settings	OPR_DEF_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst, Settings	Set Payroll System and system-wide defaults for each of your permission lists.

Setting TableSet Sharing Defaults

Access the Org Defaults by Permission Lst - Defaults page (Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst, Defaults).

Defaults

Settings

Primary Permission List:

HCPPEG

Primary List - EG

☐ Alternate Character Enabled

*Business Unit:

EGVBU

Educ & Govt/State

*Set ID:

EGVBU

E&G State / Government

*Company:

PSU

PeopleSoft University

*Country:

USA

United States

Regulatory Region:

USA

United States

*To Currency:

USD

US Dollar

Currency Rate Type:

OFFIC

Official Rate

Name Format:

English

Org Defaults by Permission Lst - Defaults page

You can tailor your PeopleSoft HRMS system for each of your users, controlling the default values that users see on pages in the system.

Note. The TableSet Record - Group Control page regulates what users see on the prompt tables in PeopleSoft HRMS. These defaults override the defaults that you set for these options on the Installation Table for this permission list.

Alternate Character Enabled Select to enable alternate character searching for this permission list.

Warning! The SetID field value that you select affects the business unit and SetID defaults for this permission list throughout your PeopleSoft HRMS system.

See Also

Chapter 8, "Setting Up and Working with Languages," Working with Alternate Character Sets, page 193

Chapter 2, "Understanding HRMS," Business Units, Tablesets and SetIDs, page 4

Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Administering Country Codes, page 151

Chapter 4, "Working with Regulatory Regions," Associating a Regulatory Region with a Transaction, page 31

Chapter 9, "Setting Up and Working with Currencies," page 201

Enterprise PeopleTools PeopleBook: Security Administration, "Setting Up Permission Lists"

Setting Payroll System Defaults

Access the Org Defaults by Permission Lst - Settings page (Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission Lst, Settings).

Defaults **Settings**

Primary Permission List: HCPPEG **Primary List - EG**

Industry: Core **Industry Sector:** Core ☒ **Carry ID**

Payroll Info

Payroll System: Payroll for North America

Standard Hours

*Default Standard Hours: 40.00 **Standard Work Period:** W Weekly

Minimum Standard Hours: 20.00 **Maximum Standard Hours:** 40.00

Canada

*Canadian Census Metropol Area: ON

*Canadian Industrial Sector: (Invalid Value)

Org Defaults by Permission Lst - Settings page

You can tailor your PeopleSoft HRMS system for each permission list, thus controlling the default values that users see on the system pages.

Industry Select *Government* if this is a U.S. federal government database. The default value is *Core*.

Industry Sector	Select <i>US Federal</i> if this is a U.S. federal government database. The default value is <i>Core</i> .
Carry ID	Select to carry the EmplID (employee ID) search key information across menus. When you select this check box, the system uses the EmplID search key that you are currently using on subsequent menus.

Note. You must select an Industry of *Government* and an *Industry Sector* of *US Federal* to fully use U.S. federal government functionality in your database. In addition, you need to select Federal on the Installation Table - Products page (INSTALLATION_TBL1).

Specifying a Default Payroll System

Payroll System	Select the default payroll system. When you select a payroll system on a table or page in PeopleSoft HRMS, the system displays <i>North American</i> , <i>Global</i> , or neither one based on the choice you enter here for this permission list. The user can override this default, as necessary.

Setting Default Standard Hours

Default Standard Hours	The default is <i>40</i> hours. The value that you enter here affects how the human resources system calculates FTE (full-time equivalency) for workers and affects compensation processing.
Standard Work Period	Select a standard work period. The standard work period is the time period in which workers must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency).
Minimum Standard Hours and Maximum Standard Hours	Enter the default minimum and maximum standard hours for this SetID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

(CAN) Canada

Canadian Census Metropol Area (Canadian census metropolitan area)	Select from the metropolitan areas defined on the Translate table.
Canadian Industrial Sector	Select from the list of values on the Translate table.

Note. (CAN) These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements*, "(CAN) Meeting Regulatory Requirements for Canada."

See Also

Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults, page 129

Chapter 12

Setting Up Personal Information Foundation Tables

This chapter discusses how to:

- Define citizen status codes.
- Define national ID types.
- Set up additional name information.
- Define address types.

Defining Citizen Status Codes

To define citizen status codes, use the Citizen Status component (CITIZEN_STATUS).

This section discusses how to define citizenship statuses.

Page Used to Define Citizenship Statuses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Citizen Status	CITIZEN_STATUS	Set Up HRMS, Foundation Tables, Personal, Citizen Status, Citizen Status	Define the citizenship statuses you'll need to track for various countries. For example, you may need to distinguish between a native, a naturalized citizen, or a permanent resident of a particular country.

Defining Citizenship Statuses

Access the Citizen Status page (Set Up HRMS, Foundation Tables, Personal, Citizen Status, Citizen Status).

Citizen Status

Country: AUS Australia

Country Citizenship Definition

Customize

Find

View All

First

1-8 of 9

Last

	*Status	*Description	Short Description		
1	1	Native	Native	+	-
2	2	Naturalised	Naturalise	+	-
3	3	Alien Permanent	Alien Perm	+	-
4	4	Alien Temporary	Alien Temp	+	-
5	5	Citizen	Citizen	+	-
6	6	Foreign Worker	Foreign Wo	+	-
7	7	Permanent Resident	Perm Res	+	-
8	8	Foreign ID Card Holder	Foreign ID	+	-

Citizen Status page

- Country

The system displays the country code you entered to access the page. Define citizenship status codes for this country.
- Status

Enter the citizenship status code that you want to define. Enter as many citizenship codes as needed.

Defining National ID Types

To define national ID types, use the National ID Type component (NID_TYPE_TABLE).

This section discusses how to assign a national ID type to a country code.

Page Used to Define National ID Type

Page Name	Definition Name	Navigation	Usage
National ID Type	NID_TYPE_TABLE	Set Up HRMS, Foundation Tables, Personal, National ID Type, National ID Type	Assign a national ID type to a country code and provide a default or a dummy national ID for a country to use when a person or applicant ID is unavailable.

Assigning a National ID Type to a Country Code

Access the National ID Type page (Set Up HRMS, Foundation Tables, Personal, National ID Type, National ID Type).

National ID Type

Country:

National ID Types						Customize	Find	First	1-9 of 9	Last
*NID Type	Default	*Description	Short Desc	National ID Format	NID as Stored					
C-RES	☐	Militar Certificate	C-RES							
CAIXA	☐	CAIXA	CAIXA	99999999999	99999999999					
CPF	☐	CPF - Person Registry	CPF	99999999999	99999999999					
CTPS	☐	CTPS - Work Card	CTPS	XXXXXXX	XXXXXXX					
ESTRAN	☐	Foreigner ID	Foreigner	XXXXXXXXXXXXXXX	XXXXXXXXXXXXXXX					
PASEP	☐	PASEP	PASEP	99999999999	99999999999					
PIS	☐	PIS	PIS	99999999999	99999999999					
RG	☐	General Registry	RG							
TIT-EL	☐	Voter Registration Card	TIT-EL							

National ID Type page

All countries track some form of national ID for payroll, identification, or benefits purposes. For example, German workers are assigned a Social Insurance number, UK workers have a National Insurance number, and U.S. workers have a Social Security number. Each type of national ID has unique formatting requirements.

When you select a country code on any global page where you are entering a national ID, the system refers to the information defined on this page to enter a default national ID type (if selected) or to ensure that you select a valid one. The system also validates the national ID you enter against the format you specify here. If you don't enter the correct number of digits or letters for a country's national ID, the system displays a warning message.

For example, when you enter national ID information for a new American person on the Biographical Details page the system uses the information set up on the National ID Type Table page to determine the valid national ID types for USA and enters PR as the default. It will validate the data you enter to make sure it matches the specific value types you set up for the National ID Type Format and format the data entered, if necessary. In this example, the system will reformat an entry of 999999999 to 999-99-9999.

Note. Application pages containing the National ID field perform an additional system check to determine the proper display by referring to the User Defined File (UDF) format. Specify these formats in PeopleSoft Application Designer.

Note. The PeopleSoft application delivers the National ID Type table with the proper types for the supported countries.

Note. (GBR) Use the NID Prefix GBR page to define valid national insurance prefixes. The Inland Revenue requires that employers' year-end reporting contain valid national insurance prefixes only.

See [Chapter 17, "Setting Up Local Country Functionality," \(GBR\) Setting Up National Insurance Prefixes for the U.K., page 457.](#)

Note. (CAN and USA) The delivered proper national ID type for Canada and the United States is *PR* (which corresponds to the Canadian Social Insurance Number and the American Social Security Number, respectively). You cannot delete this value because it is required for payroll processing.

Note. (DEU and JPN) Users in Germany and Japan aren't required to enter national ID data for workers, so PeopleSoft created a default value of *NO*.

NID Type (national ID type)

Enter the types of national IDs you will use to identify people (for example, employees, dependents, and applicants).

If you do not require a national ID type for a country, create a value of *NO* and leave the National ID Format field blank. National ID Type is often a required field on other PeopleSoft HRMS pages and this gives you a value to enter for individuals from this particular country.

Default

Select to have the system use this NID Type as the default national ID type for individuals from this country. You do not have to designate a default national ID type for a country but without a designated default users will need to specify a type every time they enter a national ID in the system.

National ID Format

Indicate the default format for the national ID. Use the following values:

- *X* or *Z* when the user can enter an alphanumeric or blank value.
- *A* and any lower case letter when the user must enter a letter.
- *9* when the user must enter a numeric value.
- If you leave this field blank, users can enter any value (or no value at all) for this national ID type.

Note. In addition to the general formatting you set up here, PeopleCode record logic performs special data validation on BEL, BRA, CAN, CHE, FRA, GBR, MEX, NLD, USA, DEU, ESP, MYS, and ITA national IDs.

Note. (USA) When reporting to U. S. federal government agencies, PeopleSoft Enterprise Payroll for North America converts the default for missing or unknown Social Security numbers to the format required by the agency.

NID as Stored (national ID as stored)

Shows how the NID is stored in the system. Match this value to the field display formats in the Application Designer.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources," Entering Name and Biographical Data

Setting Up Additional Name Information

To set up additional name information, use the Name Format Types component (NAME_FORMAT_TBL), Name Type component (NAME_TYPE_TBL), Name Prefix component (NAME_PREFIX_TABLE), Name Suffix component (NAME_SUFFIX_TABLE), Royal Name Prefix component (NM_ROYAL_PREF), Name Royal Suffix (NM_ROYAL_SUFF), and Name Title component (TITLE).

This section provides an overview of additional name information and discusses how to:

- Enter name types.
- Enter name prefixes.
- Enter name suffixes.
- Define royal name prefixes.
- Define royal name suffixes.

Understanding Additional Name Information

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of names and titles as part of your records. With the Name Prefix, Name Suffix, Royal Name Prefix, Royal Name Suffix, and Title tables, you can define standard name prefixes like *Mr.* or *Mrs.* or *Mdme.* and *Mssr.*, and suffixes like *Jr.* and *Sr.*

If you're managing a European workforce, you can track additional standard naming conventions for Germany and the Netherlands, such as the royal name prefix *von* for German workers. You can also track formal titles such as *professor*, *doctor*, or *count*. These tables provide you with a flexible method for tracking a wide variety of naming conventions in your human resources system.

Pages Used to Set Up Additional Name Information

Page Name	Definition Name	Navigation	Usage
Name Format Tbl	NAME_FORMAT_TBL	Set Up HRMS, Foundation Tables, Personal, Name Format Types, Name Format Tbl	Define name format types to use on name pages throughout HRMS.
Name Type	NAME_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Type, Name Type	Define name types and the order in which they are available.
Name Prefix	NAME_PREFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Prefix, Name Prefix	Enter name prefixes that you'll use when you record name information.

Page Name	Definition Name	Navigation	Usage
Name Suffix	NAME_SUFFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Suffix, Name Suffix	Enter name suffixes to use to record name information.
Royal Name Prefix	NM_ROYAL_PREFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Prefix, Royal Name Prefix	Enter royal prefixes and descriptions. Royal Name Prefix codes are used primarily for Germany and the Netherlands. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.
Royal Name Suffix	NM_ROYAL_SUFFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Suffix, Royal Name Suffix	Define royal suffixes. The Royal Name Suffix application is used only by Germany and prompts with DUEVO standards. When you enter names in the Personal Data pages, you can reference these standard Royal Name Suffixes.
Name Title	TITLE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Title, Name Title	Enter titles for use with names. Track standard titles—from <i>professor</i> to <i>mijnheer</i> — for names in your human resources system.

Entering Name Types

Access the Name Type page (Set Up HRMS, Foundation Tables, Personal, Name Type, Name Type).

Name Type					
Name Type					
Customize Find View All First 1-10 of 10 Last					
Order by	Name Type CD	Name Type	Short Name		
1	PRI	Primary	Primary		
2	PRF	Preferred	Preferred		
3	LEG	Legal	Legal		
4	DEG	Degree	Degree		
5	MDN	Maiden	Maiden		
6	OTH	Other	Other		
7	FR2	Former2	Former2		
8	FTR	Father	Father		
9	FR1	Former1	Former1		
10	MTR	Mother	Mother		

Name Type page

- Order by

Enter the order in which the system should make this name type available.
- Name Type CD (name type code), Name Type, and Short Name

Enter a code for the name type, the full name type name, and a short version of the name type.

Note. You cannot edit the Primary and Preferred name types because they are system data.

Entering Name Prefixes

Access the Name Prefix page (Set Up HRMS, Foundation Tables, Personal, Name Prefix, Name Prefix).

Name Prefix

CustomizeFind

1-5 of 5

Last

	*Name Prefix	Short Description	*Description		
1	Dr	Dr	Doctor	+	-
2	Miss	Miss	Miss	+	-
3	Mr	Mr	Mister	+	-
4	Mrs	Mrs	Mrs	+	-
5	Ms	Ms	Ms	+	-

Name Prefix page

Name Prefix

Enter the name prefix you want to add. When you enter names for people in the Personal Data pages, you can reference these standard name prefixes.
The system displays the prefixes you enter here as part of the person's name.
Note. Name prefixes aren't effective-dated, nor do they have a status associated with them.

Entering Name Suffixes

Access the Name Suffix page (Set Up HRMS, Foundation Tables, Personal, Name Suffix, Name Suffix).

Name Suffix

CustomizeFind

1-3 of 3

Last

	*Name Suffix	Short Description	*Description		
1	III	III	III	+	-
2	Jr.	Jr.	Junior	+	-
3	Sr.	Sr.	Senior	+	-

Name Suffix page

Name Suffix

Enter the name suffix you want to add. When you enter names for people in the Personal Data pages, you can reference these standard name suffixes.

Short Description and Description

Descriptions you enter for the prefix appear on the page as part of the person's name.

Note. Name suffixes aren't effective-dated, nor do they have a status associated with them.

Defining Royal Name Prefixes

Access the Royal Name Prefix page (Set Up HRMS, Foundation Tables, Personal, Royal Name Prefix, Royal Name Prefix).

Royal Name Prefix

Certified By: DUEVO

Royal Name Prefix					Customize Find View 100 First 1-15 of 187 Last	
	*Name Royal Prefix	*Status	Short Description	*Description		
1	a	Active	a	a	+	-
2	aan de	Active	aan de	aan de	+	-
3	aan den	Active	aan den	aan den	+	-
4	al	Active	al	al	+	-
5	am	Active	am	am	+	-
6	an	Active	an	an	+	-
7	an der	Active	an der	an der	+	-
8	auf	Active	auf	auf	+	-
9	auf dem	Active	auf dem	auf dem	+	-
10	auf der	Active	auf der	auf der	+	-
11	auf m	Active	auf m	auf m	+	-
12	auff m	Active	auff m	auff m	+	-
13	aufm	Active	aufm	aufm	+	-
14	aus	Active	aus	aus	+	-
15	aus dem	Active	aus dem	aus dem	+	-

Royal Name Prefix page

Certified By Displays the value you selected when you accessed the page: *DUEVO* for German prefixes or *NEN* for Dutch prefixes.

Royal Name Prefix Enter a royal prefix name, using up to 15 characters.

Status Royal Name Prefixes aren't effective-dated, so to retire a prefix code, change the status to *Inactive*.

Defining Royal Name Suffixes

Access the Royal Name Suffix page (Set Up HRMS, Foundation Tables, Personal, Royal Name Suffix, Royal Name Suffix).

Royal Name Suffix

Certified By: DUEVO

Name Royal Suffix					Customize Find View All First 1-15 of 66 Last	
	*Name Royal Suffix	*Status as of Effective Date	Short Description	*Description		
1	Bar	Active	Bar	Bar	+	-
2	Baron	Active	Baron	Baron	+	-
3	Baronesse	Active	Baronesse	Baronesse	+	-
4	Baronin	Active	Baronin	Baronin	+	-
5	Brand	Active	Brand	Brand	+	-
6	Condesa	Active	Condesa	Condesa	+	-
7	Earl	Active	Earl	Earl	+	-
8	Edle	Active	Edle	Edle	+	-
9	Edler	Active	Edler	Edler	+	-
10	Erbgraefin	Active	Erbgraefin	Erbgraefin	+	-
11	Erbgraf	Active	Erbgraf	Erbgraf	+	-
12	Erbprinz	Active	Erbprinz	Erbprinz	+	-
13	Erbprinzessin	Active	Erbprinzes	Erbprinzessin	+	-
14	Ffr	Active	Ffr	Ffr	+	-
15	Freifr	Active	Freifr	Freifr	+	-

Royal Name Suffix page

Certified By The system displays the value you selected to access the page: *DEUVO* for German prefixes or *NEN* for Dutch prefixes.

Royal Name Suffix Enter a Royal Name Suffix, using up to 15 characters.

Status as of Effective Date Royal Name Suffixes aren't effective-dated, so to retire a suffix code, change the status to *Inactive*.

Defining Address Types

To define address types, use the Address Type component (ADDR_TYPE_TBL).

This section discusses how to enter address types.

Page Used to Enter Address Types

Page Name	Definition Name	Navigation	Usage
Address Type	ADDR_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Address Type, Address Type	Enter address types and the order in which they are available.

Entering Address Types

Access the Address Type page (Set Up HRMS, Foundation Tables, Personal, Address Type, Address Type).

Address Type

Address Type

Customize | Find | View All | | First 1-10 of 13 Last

*Order by	Addr Type CD	Address Type	Short Type		
1	HOME	Home	Home		
2	MAIL	Mailing	Mail		
3	BUSN	Business	Business		
4	CHK	Check	Check		
5	DORM	Dormitory	Dorm		
6	LEGL	Legal	Legal		
7	CAMP	Campus	Campus		
8	OTH	Other	Other		
9	BILL	Billing	Billing		
10	OTH2	Other 2	Other 2		

Address Type page

- Order by

Enter the order in which the system should make this address available.
- Addr Type CD (address type code), Address Type, and Short Type

Enter a code for the address type, the full address type name, and a short version of the address type.

Note. You cannot edit the Home, Mailing, Business, and Check address types because they are system data.

Chapter 13

Setting Up Jobs

This chapter discusses how to:

- Define job subfunction and job function codes.
- Define job families.
- Classify jobs.
- Define job tasks.
- Set up holiday schedules.
- Set up pay groups.
- Run job code and pay group reports.

Defining Job Subfunction and Job Function Codes

To define job subfunction codes, use the Job Subfunction Definition component (JOB_SUBFUNC_DEFN). To define job function codes, use the Job Function Table component (JOB_FUNCTION_TBL).

This section provides an overview of job subfunction codes and function codes and discusses how to set them up.

Understanding Job Subfunction and Job Function Codes

Use job subfunction codes to create subfunctions that can then be assigned to job function codes. For example, you can create a job subfunction code of Payroll that can then be assigned to the job function code of Finance and Accounting. It is also possible to set up profiles for job subfunctions and job functions, if desired.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Managing Profiles"

Page Used to Define Job Function and Job Subfunction Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job Subfunction	JOB_SUBFUNC_DEFN	Set Up HRMS, Foundation Tables, Job Attributes, Job Subfunction, Job Subfunction	Set up and define job subfunction codes.
Job Function	JOB_FUNCTION_TBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Function, Job Function	Set up and define job function codes. Define the relationship of subfunctions to job functions.

Setting up Job Subfunction Codes

Access the Job Subfunction page (Set Up HRMS, Foundation Tables, Job Attributes, Job Subfunction, Job Subfunction).

Job Subfunction

Job Subfunction: H10

Job Subfunction Details

Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1980 

*Status: Active   

*Description: Payroll

*Short Description: Payroll

Job Subfunction page

Setting Up Job Function Codes

Access the Job Function page (Set Up HRMS, Foundation Tables, Job Attributes, Job Function, Job Function).

Job Function

Job Function Code: H08

Job Function Information Find | View All | First 1 of 1 Last

Effective Date: 01/01/1980 *Status: Active

*Description: Human Resources

Short Description: HR

Italy

INAIL Code:

Job Subfunctions Customize | Find | View All | First 1-4 of 4 Last

*Job Subfunction	Description		
H04	Satellite Technology		
H08	Human Resources		
H09	Benefits		
H10	Payroll		

Job Function page

(ITA) Italy

INAIL Code (*Istituto Nazionale per l'Assicurazione contro gli Infurtuni sul Lavoro* code)

The INAIL code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

Defining Job Families

To define job families, use the Job Family Table component (JOB_FAMILY).

This section provides an overview of job families and discusses how to group jobs into families.

Understanding Job Families

Create job families to group similar jobs. Using Manage Profiles you can create profiles for job families that describe all the jobs in the family.

Page Used To Set Up Job Families

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job Family Table	JOB_FAMILY_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Family Table, Job Family Table	Create job families.

Grouping Jobs Into Families

Access the Job Family Table page.

Important! The job family effective date must be effective as of the relevant job code effective dates.

Classifying Jobs

To classify jobs, use the Job Code Table component (JOB_CODE_TBL). Use the CI_JOB_CODE_TBL component interface to load data into the tables for this component.

This section provides an overview of job codes and discusses how to:

- Add new job codes.
- Assign points to job evaluation criteria.
- Enter salary survey information.
- Associate salary plan information and base pay rate codes with a job code.
- Associate non-base pay rate codes with a job code.

Understanding Job Codes

In HRMS, you identify jobs by job codes, and you maintain information about jobs independent of the person or group performing that job. For example, you assign salary grades and standard hours to a job regardless of who holds it.

When you save a job code, the system creates a rate code defaulting rule for the salary step, with the Rate Code Source Indicator equal to the job code. The system uses rate code defaulting rules (instead of the Job Code and Salary Step setup tables) for the compensation defaulting.

Understanding Job Codes and Positions in HRMS

In HRMS, job codes are different from positions: Within a single job code, you can have a number of positions. For example, you can have a job code representing Administrative Assistant, and within that job code, you can have different Administrative Assistant positions—one in your Marketing department, one in Research, and one in your Compensation group. You use positions to track details on a particular job in a particular department or location. Positions usually have a one-to-one relationship with workers. Job codes have a one-to-many relationship with workers.

You still use job codes to create general groupings or job classifications in your organization if you drive PeopleSoft Enterprise Human Resources by position in your organization, . You then use the Job Code groupings as the basis for default job data for positions.

Note. If you use PeopleSoft Enterprise Pension Administration, set up jobs, and not positions, for your pension payees. You can use Manage Profiles to set up profiles for your job codes.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles*, "Managing Profiles."

(JPN) Using Job Codes and Capability Grade Management in Japan

The Job Code field on the Job Details page of Job Requisition Data is a required field. If your organization has adopted a human resources management system based on capability grade, you may not want to associate a job code with your job requisitions. However, to satisfy the requirements of that page, you need to have a dummy job code that you can enter in the Job Code field. The dummy job code has no processing associated with it. The Job Code Profile page, on which you create the dummy code, has only six required fields, but of these fields, five take default values, so you need to enter only a Job Title. We recommend using a job title that clearly indicates that this is a dummy job code.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions"

Pages Used to Classify Jobs

Page Name	Definition Name	Navigation	Usage
Job Code Profile	JOBCODE_TBL1_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile	Add new job codes to the system and define job family, compensation, and regulatory information for each job code.
Business Units by Job Code	JOBCODE_BU	Click Business Units that use this Set ID link on the Job Code Profile page.	View all business units associated with the SetID for this Job Code.

Page Name	Definition Name	Navigation	Usage
Evaluation Criteria	JOBCODE_TBL2_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Evaluation Criteria	Assign points to certain job evaluation criteria. You can use this information to rank job codes in your company and to assess salary grades, steps, and exempt and nonexempt categories for personnel.
Market Pay Match	JOBCD_MP_SAL_SURV	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match	Associate a market pay matrix to a specific job code.
Default Compensation	JOBCD_COMP_RATE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Default Compensation	Associate salary plan information and base pay rate codes with a job code. By associating rate codes with job codes, you define compensation packages that can be associated with a worker's Job record on the Job Information page.
Non-Base Compensation	JOBCD_NON_BASE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Non-Base Compensation	Associate non-base rate codes with a job code.

Adding New Job Codes

Access the Job Code Profile page (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile).

Job Code Profile

Evaluation Criteria

Market Pay Match

Default Compensation

Non-Base Compensation

Set ID:

DEU01

Job Code:

140035

[Business Units that use this Set ID](#)

Job Code Profile

Find

First

1 of 1

Last

*Effective Date:

01/01/1980

*Status:

Active

☐ Key Job Code

Go To Row

*Job Title:

Analyst-Financial

Short Job Title:

Fin Anlyst

Job Description:

Financial Analyst

Job Function Code:

FIN

Fin & Acc

Job Subfunction:

Job Family:

LHUMAN

HR

*Standard Hours:

40.00

Standard Work Period:

W

Weekly

Workers' Comp Code:

*Manager Level:

Non-Mgr

*Comp Freq:

M

Monthly

☐ Medical Checkup Required

Regular/Temporary:

Union Code:

Singapore

Festive Advance Pay Program:

Job Code Profile page (1 of 4)

Canada

National Occupational Classif:

Pay Equity Job Class: ☐ Seasonal

BPS Activity:

Stats-Can Acad Teaching Survey

*Report Flag:

Duties:

WCB Classification Customize | Find | View All | First 1 of 1 Last

Province	Rate Group	Classification		
			+	-

Germany

☐ Medical Surveillance Required

United Kingdom

UK SOC Code:

Italy

INAIL Code:

Malaysia

Number of Hours in a Work Day:

Festive Advance Pay Program:

Job Code Profile page (2 of 4)

USA

*EEO-1 Job Category:

*EEO-4 Job Category:

*EEO-5 Job Category:

*EEO-6 Job Category:

Standard Occupational Classif:

Occupational Classif Code:

EEO Job Group:

*FLSA Status:

*Tipped: ☐ Available for Telework

Job Code Profile page (3 of 4)


Australia

ASCO Code: 

Salary Packaging Options

Package Template ID: 

Package Rule ID: 

Higher Education

Job Function: 
 Type of Work Performed: 

Annual Contact Hours:
 Teaching Weeks:


Brazil

Brazilian Occupation Cd:

Updated on:
 Updated By:

Job Code Profile page (4 of 4)

Job Code	A unique code that you associate with a specific job in your organization.
Key Job Code	Select this check box if it is a key job for your organization's succession planning.
(USF) Occupation Series, Official Posn Title Code (official position title code), and Organization Posn Title Cd (organization position title code)	Select from the list. This fields are available on the federalized database for users authorized to view federal information.
Job Function Code	Select the code that best categorizes the job by function, such as administrative, legal, or management.
Job Subfunction	Select the code that best categorizes the job's subfunction.
Job Family	Select a job family to categorize a job code into a more general grouping. For example, you might group a trust analyst and an operations analyst into a job family called <i>Analyst</i> .
Standard Hours	Enter the default number of hours in a standard work period for this job. The Standard Hours value that you enter on this page becomes the default for all workers who are associated with this job code. You can modify the standard hours for an worker on the worker's Job Data pages (JOB_DATA). The value that you assign for Standard Hours must fall between the minimum standard hours and the maximum standard hours defined in the Primary Permission List Preferences table. If no minimum standard hours and maximum standard hours are defined on the Primary Permission List Preferences table, the system uses the values on the Installation table.

Standard Work Period	Select the time period in which workers must complete the standard hours. Maintain these values in the Frequency Table page (FREQUENCY_TBL). The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE (full-time equivalency). See <i>PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components</i>
Workers' Comp Code (Workers' Compensation code)	Enter a code to specify the workers' compensation plan to which this job code belongs.
Manager Level	Select the level of management associated with the employee.
Comp Freq (compensation frequency)	Select the frequency in which the compensation is quoted. The default value is the frequency that you specified on the Installation table
Medical Checkup Required	Select if this job code requires a onetime medical checkup when the worker is hired into the job. Note. If you're tracking a German workforce, also indicate whether the job requires ongoing medical surveillance in the Job Code Profile section for local German functionality, especially if the worker comes into contact with hazardous conditions or materials on the job.
Union Code	If you're defining a job code that is associated with a union, select a union code. Define union codes as a part of the Manage Labor Relations business process in PeopleSoft Human Resources.
Updated On	Last updated timestamp for this jobcode.
Updated By	Last updated by user information

(SGP) Singapore

Festive Advance Pay Program	If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here. The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods. This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(CAN) Canada

National Occupational Classif (National Occupational Classification)	Select a Canadian National Occupation classification code.
Seasonal	Select if the job is seasonal.
BPS Activity (Business Payrolls Survey activity)	If you are participating in the Statistics Canada Business Payrolls Survey, select the job code's business activity.
Report Flag	Select the appropriate option if the job code is to be reported in one of the Statistics Canada Academic Teaching Surveys. This field is for Canadian higher education degree-granting institutions only.
Duties	Indicate whether the duties of the job code consist of <i>Teaching only</i> , <i>Teaching & other resp</i> (teaching and other responsibilities), or <i>Research</i> . This field is required if you selected the Report Flag check box. This field is for Canadian higher education degree-granting institutions only.
Province	Enter the province that you report to when you perform WCB (Workers' Compensation Board) reporting for this job code. WCB reporting in Canada is always done at the provincial level; there is no national WCB level.
Rate Group	Select a rate group for this job code. Each industry is assigned a rate group for assessment purposes, based on the type of industry and the accident/injury level in that industry in that province.
Classification	Select a WCB classification for this job code. The classification indicates the industry that applies to this job code.
Note. The rate groups and classifications can be obtained from your provincial WCB. The rates and rate codes may vary from province to province.	

(DEU) Germany

Medical Surveillance Required	Select if ongoing medical surveillance is required for this job code. For instance, some jobs require workers to be in contact with hazardous materials, and health and safety regulations require that workers receive periodic medical checkups as long as they are in that job.

(GBR) United Kingdom

UK SOC Code (United Kingdom Standard Occupational Classification code) Enter the appropriate UK Standard Occupational Classification code. This code is required for Northern Ireland Fair Employment reporting.

(ITA) Italy

INAIL Code Select the job code's INAIL code from the list of options. This code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

(MYS) Malaysia

Number of Hours in a Work Day Enter the standard workday hours that are used for payroll and leave calculations.

Festive Advance Pay Program If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here.

The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods.

This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(USA) USA

EEO Job Categories Select a job category. The EEO-1 code is also the Federal Occupation Category (FOC).

To retrieve valid job codes for EEO-1 reporting, select a EEO-1 job category that is not equal to *No EEO-1 Reporting*.

Standard Occupational Classif (Standard Occupational Classification) If your company has operations in Alaska, you can enter a Standard Occupational Classification (SOC) code for use in unemployment insurance reporting. You enter U.S. SOC codes in the U.S. Standard Occupational Classification Table.

EEO Job Group To further classify the job categories, enter the EEO job group to which this job belongs.

FLSA Status (Fair Labor Standards Act status) Enter a code to indicate whether this job is exempt or nonexempt according to the FLSA. This value becomes the default for the FLSA status on all worker job records that are associated with this job code. Example values are *Administrative*, *Executive*, *Nonexempt*, and *Professional*.

Available for Telework Select if this location allows workers to work remotely.

(AUS) Australia

ANZSCO Code
(Australian and New Zealand standard classification of occupation code) Select the ANZSCO code.

Package Template ID and Package Rule ID Use these fields to associate this job code with the package rules and templates you set up as part of salary packaging for Australia. These IDs act as defaults for this job in employee salary packaging modeling. These fields are also available on the Position Table; the Position Table fields take precedence over the fields here.

By associating templates and rules with job codes, package components are automatically assigned to workers during the package modeling process. Using templates can save time by ensuring that you use the correct template and rule when modeling.

Note. You set up package templates on the Package Template page. You set up package rules on the Package Rule page.

(AUS) Higher Education

These fields are available when you select the Australian Public Service box on the Country Specific page of the Installation component.

Job Function Select the default job function for the organization.

Type of Work Performed Select the default type of work performed for the organization.

Annual Contact Hours Enter the number of contact hours. This depends on the type of work performed. See "Determining Contact Hours" to calculate this value.

Teaching Weeks Enter the default number of teaching weeks.

(BRA) Brazil

Brazilian Occupation Cd (Brazilian occupation code)

Enter the appropriate Brazilian Code of Occupation (CBO - Código Brasileiro de Ocupações) from the official table.

Codes effective before December 31, 2002 should be in the format 99999. Codes effective from January 1, 2003 onward should be in the format 9999–99.

Note. Go to www.mte.gov.br to view a list of CBOs.

(USF) US Federal

These fields are available when you work in a federalized (U.S. Federal) database:

 US Federal

Agency:

FIG

Federal Financial Institutions

Sub-Agency:

ZZ

Federal Information Agency - Not Reportable

POI:

7444

Commitment Act TL

Bargaining Unit:

8888

Ineligible to Join

Pay Basis:

Per Annum

Fund Source:

Parenthetical Title:

PATCOB Code:

Administrative

☐ Override NFC Indicator

NFC Update Indicator:

NFC Function Code:

Add

☐ Employee Financial Interests

☐ Executive Financial Disclosure

Job Code Profile page – US Federal 1 of 2

Classification Factors

Functional Class: Not Applicable

Sensitivity Code: Non Sensitive

LEO Position:

Classification Standard:

Classifier:

Date Classified: 05/09/1997

☐ IA Actions

Target Grade:

Official Title Prefix:

Classification Authority: Title 5, GS Class System

Classification Factors

Find | View All First 1 of 1 Last

Classification Factor:	Factor Level	Points	Weight (%)

OPM Certification Nbr:

Grade Points			Total Points
Salary Grade	Min Points	Max Points	Total Points:
11	0	0	0

Position Classification Stds

Job Code Profile page – US Federal 2 of 2

Override NFC Indicator Select this check box to override the value in the NFC Update Indicator field.

NFC Update Indicator Status of the transaction in relation to NFC, as maintained by the user or system. Options in this field include:

- *In Process* – This Jobcode has been run through the export program and will be sent to NFC.
- *Not Ready* – User intends to exclude this Jobcode from export to NFC.
- *Other* – Status maintained by system user.
- *Ready* – User intends to include this Jobcode in the next NFC export.
- *SINQ* – This Jobcode has not successfully passed NFC's PINE Edits and needs correction.

NFC Function Code Identifies the task to be performed by NFC on a master record. Options in this field include *Add, Change, Delete, Inactivate, and Reactivate*.

Bargaining Unit If the job code is associated with a union, select a bargaining unit.

Pay Basis Enter the pay basis for which you quote salaries for this job code; for example, *Per Annum, Per Hour*.

Classification Factors	The system displays the classification authority and the classification factors that are associated with the classification standard.
Target Grade	Enter the target grade of the job, if applicable.
Official Title Prefix	NFC-defined list of title prefixes.
Factor Level	Enter a classification factor level for each classification factor that is associated with this classification standard.
Points, Grade Points, and Total Points	The system displays the points that are associated with the classification standard.
Weight (%)	The system displays the weight percentage of the points that are associated with the classification standard.
OPM Certification Nbr (office of personnel management certification number)	Enter the OPM certification number that is associated with this job code.
Position Classification Std (position classification standards)	Enter the position classification standards that are used.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Festive Advance, "Setting Up Festive Advances"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Salary Packaging, "Setting Up Salary Packaging"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Track Faculty Events, "(AUS) Reporting DETYA for the Australian Higher Education Sector," Understanding DETYA Calculations and Reference Dates

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook

Assigning Points to Job Evaluation Criteria

Access the Evaluation Criteria page (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Evaluation Criteria).

Job Code Profile	Evaluation Criteria	Market Pay Match	Default Compensation	Non-Base Compensation															
Set ID: DEU01		Job Code: 140035																	
Evaluation Criteria Find View All First 1 of 1 Last																			
Effective Date: 01/01/1980		Status: Active Go To Row																	
Description: Analyst-Financial																			
Job Evaluation Criteria <table border="1"> <thead> <tr> <th></th> <th>Points</th> <th>Percent</th> </tr> </thead> <tbody> <tr> <td>Knowhow:</td> <td> 0 </td> <td></td> </tr> <tr> <td>Accountability:</td> <td> 0 </td> <td></td> </tr> <tr> <td>Problem-Solving:</td> <td> 0 </td> <td></td> </tr> <tr> <td>Total Points:</td> <td></td> <td></td> </tr> </tbody> </table>			Points	Percent	Knowhow:	0		Accountability:	0		Problem-Solving:	0		Total Points:			Commitment Accounting ☒ Used by Position Management		
	Points	Percent																	
Knowhow:	0																		
Accountability:	0																		
Problem-Solving:	0																		
Total Points:																			
France																			
Employee Category:		Activity Type:																	
INSEE Code:																			
Job Category Code:																			
Germany																			
Function Code:																			
BA Code:																			
☐ Technical																			
Training Program Find View All First 1 of 1 Last																			
Training Program:		+ -																	

Evaluation Criteria page

Knowhow	Enter points that represent the worker's knowledge required to perform the job.
Accountability	Enter points that represent the worker's ability to do the assigned job.
Problem-Solving	Enter points that represent the worker's ability to work out solutions despite obstacles.
Total Points	You determine the points by comparing each of these factors to every other job in your company. The greater the know-how, accountability, and problem solving for this job, the higher the points. For example, you would probably assign more accountability points to a controller than to a secretary because the controller has more responsibility. The system calculates Total Points and the Percent, or relative importance, of each factor. For example, if Knowhow receives 33.2 percent of the total points, Accountability receives 33.7 percent, and Problem-Solving receives 33.1 percent, then all three factors are almost equally important. However, if Knowhow receives 54.4 percent of the total points, Accountability receives 9.2 percent, and Problem-Solving receives 36.4 percent, then Knowhow is of greater importance than Accountability or Problem-Solving, and Accountability is of little significance.

Used by Position Management

Select if this job code is used by a position. If you specified full or partial position management on the Installation Table, this check box is selected by default.

A selected check box tells the system that you're budgeting for the job code at the position level. It does not restrict your ability to attach positions to a job code or attach workers to a job code. If this check box is deselected, you can still set up a position with the job code. If the check box is selected, you can still enter the job code on the worker's job data record.

When you deselect this check box, the Pre-Encumbrance Indicator and Encumber Salary Option fields appear.

Pre-Encumbrance Indicator

Indicate if you want the system to encumber this job code immediately (*Immediate*), not at all (*None*), or upon requisition (*Requisition*).

Encumber Salary Option

If you are using Commitment Accounting to encumber salaries, the system uses the option that you select to determine the salary amount when it encumbers the salaries of vacant positions.

Encumber Salary Amount

If you select *User Specas* the Encumber Salary Option, enter the salary amount to encumber.

(FRA) France**Employee Category**

Select the employee category for the job code. This code is required for these statutory reports:

- Personal Register
- Annual Survey by Nationality
- French Accident report

INSEE Code (National Institute for Statistical and Economic Studies code)

Link this job code to an INSEE code for use in the French Disability report.

Job Category Code

Select a job category code, required for the Single Hiring Statement report.

(DEU) Germany**BA Code** (Bundesanstalt fuer Arbeit code)

Select this job code's BA code, if applicable.

Technical

Select if this job code is technical.

(FRA) French Public Sector

Job Type	Select whether this job is public, private, or public private combination.
Contract Worker Compensation	Select the salary grade table type and salary grade table that apply to contract workers in this job. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Public Sector</i>, "Setting Up French Public Sector Tables," Setting Up Salary Grades.
Job Outside Coll Lbor Agrment (job outside the collective labor agreement)	Select this check box if the job code is not covered by a collective labor agreement.
Regulatory Region	Select the job code's regulatory region. Note. Labor agreements are grouped by regulatory region. If you are assigning a labor agreement to this job code, ensure that the regulatory region matches that of the labor agreement. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration</i>, "Setting Up Labor Administration Data," Defining Labor Agreements.
Labor Agreement	Select the labor agreement that covers this job code. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration</i>, "Setting Up Labor Administration Data," Defining Labor Agreements.
Labor Agreement Category	Select the labor agreement category for this job code. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration</i>, "Setting Up Labor Administration Data," Defining Labor Agreement Categories.
Auto Hire Validation	Select to have the system automatically validate the newly hired person's qualifications with the job requirements.
Match Competencies	Select to have the system match the competencies associated with this job code with the qualifications of the person assuming the job.
Occupation Code	Select an occupation code for this job code.

Training Program

Training Program

You can associate a training program with this job code, which you'll find helpful in career planning. When you set up training and development programs for workers in this job code, you can use the default training program as the basis for an individual career-training plan.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

Associating Market Pay Matrices to Job Codes

Access the Market Pay Match page (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match).

Survey Job Code	Survey Provider	Description	Survey Salary	Currency	Mean Base Rate	Median Base Rate	Mean Total Comp	Med Total Comp	Midpoint Rate
MCD14	MCDONALD	Grimace	60000	usd	61,100.000000	62,000.000000	63,000.000000	60,000.000000	62,000.000000

Market Pay Match page

Matrix Name

Select the market pay matrix that you want to associate with this job code. The effective date of the matrix must be less than or equal to the effective date of the job code.

Edit Matrix

Click this button to access the Data Content page where you can view and edit values associated with this matrix. Any other job code linked to this same matrix will be impacted as well.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Using Configurable Matrices"

Chapter 18, "Setting Up and Working with Market Pay," page 461

Associating Salary Plan Information and Base Pay Rate Codes with a Job Code

Access the Default Compensation page (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Default Compensation).

Job Code Profile | Evaluation Criteria | Market Pay Match | **Default Compensation** | Non-Base Compensation

Set ID: SHARE Job Code: KUML01

Default Compensation Find | View All First 1 of 1 Last

Effective Date: 01/01/2005 Status: Active

Description: Recruit-in-Training

Job Ratio

Minimum Salary	Midpoint Salary	Maximum Salary	Currency	Frequency

Sal Plan/Grade/Step

Salary Set ID: SHARE Sal Plan/Grade/Step: KUML E02

Military

Service: KUUAR US Army Rank: 1/C Cadet 1/C

Midpoint

Hourly:	7.99	USD
Daily:	63.90	USD
Monthly:	1,384.50	USD
Annual:	16,614.00	USD

Job Code Base Components Customize | Find 1 of 1

	*Rate Code	Details	Comp Rate	Currency	*Frequency	Points	Percent	Rate Code Group	Apply FTE		
1		Details							☐	+	-

Default Compensation page

By associating rate codes with job codes, you define default compensation packages that will be associated with a worker's job record on the Job Information page.

Job Ratio

The job ratio calculates comparative salary information for workers who perform similar work activities in countries where plan/grade/step data is used to support industrial tariffs. If you use plan/grade/step data for job-related activities, you do not need to use the Job Ratio fields.

The worker's compensation rate (as specified on the Compensation page of the Job Data component) is converted to the currency and frequency defined in the Job Ratio group box. The result is divided by the job code midpoint salary.

**Minimum Salary,
Midpoint Salary,
Maximum Salary,
Currency, and
Frequency**

Enter the minimum, midpoint, and maximum salary amounts according to the frequency (which appears by default from the Job Code Profile page but can be overridden here) that is available to this job code. Indicate the currency of the salary amounts if it is not the same as the default.

Sal Plan/Grade/Step (salary plan/grade/step)

If your company has established compensation programs, select the codes that represent the default salary plan/grade/step for this job. You define these codes in the Salary Plan Table, the Salary Grade Table, and the Salary Step Table.

Sal Plan/Grade/Step

Select a salary plan, grade and step. Note that all three fields are optional. If you do set defaults, the system populates the rest of the Salary Administration Plan fields on the page and the Salary Step Components grid with hourly, monthly, and annual midpoint pay rates that are associated with the grade.

When you assign a worker to a job code on the Job Information page (JOB_DATA_JOBCODE), the system enters these values as a default on the Salary Plan page (JOB_DATA_SALPLAN).

Note. If you have associated a salary plan with the location code assigned to the worker on the Work Location page (JOB_DATA1), the system will use the location salary plan as a default on the Salary Plan page instead of the job code salary plan.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Administering Salary Plans, Grades, and Steps," Tying Salary Plans to Job Codes, Locations, or Labor Agreements.

Military

Service

Select the military service to which this job belongs. This becomes the military service default value in Manage Positions when you associate this job code to a position.

Rank

Select the military rank to which this job is classified. This becomes the military rank default value in Manage Positions when you associate the job code to a position.

Job Code Base Components

Select one or more rate codes that will make up default base compensation for this job code. The default values for compensation rate, currency, and frequency come from the Rate Code Definition page, but you can set different values if required.

Note. If a rate matrix is associated with the rate code, the compensation rate field will be unavailable. In this case, the rate will be set dynamically based on employee data when this rate code is added to the employee's compensation record.

Details	Click to review the description, comp rate type (compensation rate type), and rate code class that are associated with the rate code.
Frequency	The system displays the compensation frequency of the rate code as the default frequency. Rate code frequency is defined on the Comp Rate Code Table page. See Chapter 10, "Setting Up and Working with Frequencies," page 209.
Points	The system displays the points that are associated with this rate code, if applicable.
Percent	If the rate code type for this rate code is <i>Percent</i> , the system displays the percent that is to be applied to the job compensation rate or to a rate code group.
Apply FTE (apply full-time equivalency)	Select to indicate that the compensation rate for this rate code is multiplied by the FTE in calculating the job compensation rate.

Note. Column order for grids may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar as necessary to view all the columns.

See Also

"PeopleSoft Enterprise HRMS Application Fundamentals Preface," page xxxv

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting"

Associating Non-Base Pay Rate Codes with a Job Code

Access the Non-Base Compensation page (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Non-Base Compensation).

Job Code Profile | Evaluation Criteria | Market Pay Match | Default Compensation | **Non-Base Compensation**

Set ID: DEU01 Job Code: 140035

Non-Base Compensation Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 Status: Active Go To Row

Description: Analyst-Financial

Data Customize Find 1 of 1								
*Rate Code	Details	Comp Rate	Currency	*Frequency	Points	Percent	Rate Code Group	Apply FTE
1	Details							☐ + -

Non-Base Compensation page

The system doesn't use non-base pay rate codes as default values on any HRMS pages. The codes are used for payroll processing.

Defining Job Tasks

To define job tasks use the Job Tasks component (JOB_TASK_TABLE) and Job Code Task Table component (JOB_CODE_TASK_TABLE). Use the JOB_TASK_TABLE component interface to load data into the tables for this component.

This section provides an overview of job tasks and discusses how to define job task codes.

Understanding Job Tasks

Define job task codes, such as *Data Entry*, and assign it to a Job Code on the Job Code Task Table. On the Job Code Task Table, indicate the importance and frequency of the task. You can use Manage Profiles to set up a profile for a job task.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Profiles, "Managing Profiles"

Pages Used to Define Job Tasks

Page Name	Definition Name	Navigation	Usage
Job Tasks	JOB_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Tasks, Job Tasks	Define job task outcomes. For example, if a job requires an worker to pick up heavy boxes and move them, then define moving heavy boxes as the essential job task. Because a worker with a disability could use a forklift to move them, do not define the job task as <i>lifting</i> heavy boxes.
Job Code Task Table	JOB_CODE_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Task Table, Job Code Task Table	Associated job tasks with each job code.

Defining Job Task Codes

Access the Job Code Task Table page (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Task Table, Job Code Task Table).

Job Code Task Table

Set ID: SHARE Job Code: 140035 Analyst-Financial
 Location Set ID: SHARE Location Code: KCQC00 Montreal Office

Job Code Find View All First 1 of 1 Last

*Effective Date: 01/01/1980 Total Percent Time Spent: 100.00

Detail Customize Find View All First 1-2 of 2 Last							
	*Jobtask Set ID	Job Task	Descr	*Imprtce	*Freq	*Cons	% Time Spent
1	SHARE	K00010	Data Conversion	Esse	We	Quite	60.00
2	SHARE	K00037	System Design	Margi	Da	Very I	40.00

Job Code Task Table page

Total Percent Time Spent

The system calculates and displays this when you move out of the % Time Spent field. The total cannot exceed 100%.

Note. Once created, this information is particularly useful for discussing job requirements with applicants. Although the ADA prohibits you from asking applicants if they have disabilities, you can show them a job's task list and ask them if they might have difficulties in completing the tasks. This way, you offer the applicants the opportunity to describe their disabilities and any accommodations that they need to perform the job tasks.

Jobtask Set ID

Select a job task set ID from the available options. Valid values are stored on the TableSet ID page.

Job Task

Select a job task from the available options. Valid values are stored on the Job Tasks page.

Imprtce (importance)

Select the importance of the job task to the particular job code. Valid values are in the Translate Table.

Freq (frequency)

Enter how often the job task occurs for each job code. Valid values are in the Frequency Table.

Cons (consequence)

Select the result that occurs if the job task isn't performed. Valid values are in the Translate Table.

% Time Spnt
(percentage time spent)

Enter the percentage of time that is spent on the job task.

Setting Up Pay Groups

To set up pay groups, use the Pay Group Table component (PAYGROUP_TABLE).

This section provides an overview of pay groups and discusses how to:

- Set up and describe pay groups.
- Set up process controls for pay groups.
- Set up payroll calculation parameters for pay groups.
- (USA) Specify the FLSA period definition.
- (E&G) Enter additional E&G earnings codes.

Understanding Pay Groups

When implementing a payroll system for use with HRMS, one of your major tasks is to set up pay groups. For example, you might create different pay groups for employees with different sets of benefits or earnings.

While pay groups may seem specific to payroll processing, you also need this information for Human Resources, to set up job records and benefit programs. Many of the default field values on the Administer Workforce pages are based on the pay group values that you specify on the Pay Group Table component (PAYGROUP_TABLE). Set up at least one pay group for each company that you established in the Company component (COMPANY_TABLE) or the Agency USF component (AGENCY_TABLE) for U.S. federal users.

See [Chapter 11, "Setting Up Organization Foundation Tables," Entering Company Information, page 243.](#)

See [Chapter 11, "Setting Up Organization Foundation Tables," \(USF\) Entering Agency Information, page 271.](#)

Setting Up Your Pay Group

Where you set up your pay group depends on which payroll application you use:

- PeopleSoft Enterprise Payroll for North America.

If you use PeopleSoft Payroll for North America, use the Pay Group table pages discussed in this section as well as additional pages of the Pay Group table that are documented in the *PeopleSoft Enterprise Payroll for North America PeopleBook*.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "Setting Up Pay Groups."

- PeopleSoft Enterprise Payroll Interface

If you use PeopleSoft Payroll Interface, use the Pay Group Table pages discussed in this section as well as additional pages of the Pay Group table that are documented in the *PeopleSoft Enterprise Payroll Interface PeopleBook*.

See *PeopleSoft Enterprise Payroll Interface 9.1 PeopleBook*, "Setting Up Payroll Schedules."

- PeopleSoft Enterprise Global Payroll.

If you use PeopleSoft Global Payroll, use the Pay Group component in that application.

See *PeopleSoft Enterprise Global Payroll 9.1 PeopleBook*, "Defining the Organizational Structure," Defining Pay Groups.

- Pay system other than a PeopleSoft payroll application.

If you are not using a PeopleSoft payroll application, use the Pay Group table pages discussed in this section.

- PeopleSoft Enterprise Pension Administration.

If you use PeopleSoft Pension Administration, also set up pay groups for your pension payee companies. Pension Administration doesn't use pay groups for paying pension benefits.

See *PeopleSoft Enterprise Pension Administration 9.1 PeopleBook*

Note. If you use more than one payroll application (for example, Payroll for North America and Global Payroll), set up the pay groups required for both applications. Otherwise, set up only the pay groups required for the application you are using. The company and pay group keys must be unique to the payroll application; do not use the same combination of keys for multiple payroll applications.

Using the Pay Group Table

The Pay Group Table component consists of nine pages. For Human Resources, enter information only on the first three pages of the component, because that information is used across all HRMS applications. The last six pages in the component are used with Payroll for North America, and to a lesser extent, with Payroll Interface.

Pages Used to Set Up Pay Groups

Note. Do not use this component with PeopleSoft Enterprise Global Payroll. Additional pages of the Pay Group Table component are documented in the *PeopleSoft Enterprise Payroll for North America PeopleBook* and the *PeopleSoft Enterprise Payroll Interface PeopleBook*. The pages listed below are also documented in the *PeopleSoft Enterprise Human Resources: Administer Salaries for the Netherlands PeopleBook*.

Page Name	Definition Name	Navigation	Usage
Definition	PAYGROUP_TABLE1	• Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table, Definition • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table, Definition	Set up and describe pay groups.

Page Name	Definition Name	Navigation	Usage
Process Control	PAYGROUP_TABLE2	- Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table, Process Control - Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table, Process Control	Establish employee type options for a particular pay group.
Calc Parameters	PAYGROUP_TABLE3	- Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table, Calc Parameters - Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table, Calc Parameters	Define further payroll processing parameters for pay groups.
FLSA Period Definition	FLSA_PERIOD_SBPNL	- Click FLSA Period Definition on the Calc Parameters page. - Click FLSA Period Definition on the Calc Parameters page.	(USA) Specify FLSA period definition and other parameters for the pay group's FLSA calculation.
Education and Government Additional Earnings Codes	PAYGRP_TBL3_HP_SEC	- Click Addl Educ/Govt Earnings Codes on the Calc Parameters page - Click Addl Educ/Govt Earnings Codes on the Calc Parameters page	(E&G) Add earnings codes for education and government

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Setting Up Pay Groups"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Salaries for the Netherlands, "Setting Up Administer Salaries for the Netherlands," Creating and Maintaining Pay Groups

Setting Up and Describing Pay Groups

Access the Definition page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table, Definition or Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table, Definition).

DefinitionProcess ControlCalc Parameters

Company:FRGFederal Reserve Board

Pay Group:F09FLSA Exempt Overtime

Pay Group InformationFindFirst1 of 1Last

*Effective Date:01/01/1980

*Status:Active

*Set ID:FEDPS

☐ Retiree Pay Group

*Description:FLSA Exempt Overtime

PI Configuration ID:

Short Description:FLSAOTime

Deduction Priority:

*Country:USAUSA

Currency:

*Employee Type Default:Salaried

Frequency

*Pay:BBiweekly

*Daily:DDaily

*Monthly:MMonthly

GL Use

Rate Type:OFFIC

Conv Date:C

Pages 1 - 3Pages 4 - 6Pages 7 - 9

Definition page

Pay Group	The Pay Group value that you specified in the entry dialog box is displayed.
	Note. On employee job records, the Pay Group default is from the company level.
Set ID	Select a set ID for the shift table used by the employees in this pay group. For pay groups that don't use a shift table, use a generic set ID.
Retiree Pay Group	Select for a separate retiree pay group. PeopleSoft recommends keeping retirees in their own pay group. There is no processing associated with this check box.

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PI Configuration ID
(Payroll Interface configuration ID)

Select, if appropriate. The PI Configuration ID is set up using the Configuration Table component (INTRFC_CONFIG) in Payroll Interface. You must set up that component first, or leave this field blank for now.

Note. You *must* enter a value for Payroll Interface. If the PI Configuration ID is not set up correctly, payroll processing in Payroll Interface will not function properly. Refer to the *PeopleSoft Enterprise Payroll Interface PeopleBook* for more information.

Deduction Priority

Enter a deduction priority number for your pay group. The deduction priority is used for multiple job employees when the single check option is not selected for a company.

Employee Type Default

Select the most common employee type within the pay group. The system uses this value as the default for the pay group's employee job records. The default you enter on this page is edited against the Benefit Program table. You need either to set up that table first or leave this field blank for now. Values are as follows:

- *Salaried*: Select for employees whose earnings are based on an amount per pay period, rather than accumulated hours. You can still enter exceptions on the pay sheets.
- *Hourly*: Select for employees who don't work the same number of hours each pay period. Typically, an hourly employee requires positive time reporting. In this case, you enter the hours worked on the pay sheets.
- *Exep Hrly* (hourly exceptions): Select for employees who work a set number of hours each pay period. Enter only exceptions to their schedule on the pay sheets.
- *Not Appl* (not applicable): Select if this field isn't applicable.

(CAN) Wage Loss Plan Default

Specify a wage loss plan default value for the pay group. This default value assigns employees the appropriate wage loss plan on the Canadian Income Tax Data page whenever the system automatically creates employee tax data records.

Frequency**Pay**

Select the pay period frequency.

Note. If the employee's compensation rate on the Compensation page is quoted with the same frequency type as the pay period (for example a monthly frequency), you must use the same frequency ID (same annualization factor) for both the pay frequency and the compensation frequency.

Daily

Select the frequency used by Payroll for North America to calculate the daily pay rate. Only frequencies on the Frequency table with a frequency type of daily are available for selection.

Monthly Select the frequency used by Payroll for North America to calculate a monthly pay rate. Only frequencies on the Frequency table with a frequency type of monthly are available for selection.

General Ledger Use

PeopleSoft Enterprise General Ledger uses these fields.

Rate Type Select the appropriate value from the list provided.

Conv Date (conversion date) Values are *Check Date*, *Pay End Date*, and *Today's Date*.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Defining Deductions," Setting Up Deductions

Chapter 10, "Setting Up and Working with Frequencies," Understanding Frequency in Payroll for North America, page 222

Setting Up Process Controls for Pay Groups

Access the Process Control page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table, Process Control or Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table, Process Control).

Process Control page

You establish options on this page before you assign employee types on employee records. For example, you might want to group only salaried employees in your monthly pay group and group hourly and exception hourly employees in a biweekly pay group.

Continue With Errors

Continue With Errors

Select to enable the Pay Confirmation process to proceed even if the Pay Calculation process encounters nonfatal calculation errors. The system moves the paysheets in error to a designated off-cycle calendar to be corrected in a separate off-cycle run.

Note. All pay groups attached to a single pay run ID must have the same setting in the Continue With Errors option on this page. If this condition is not met, the system cannot transfer any errored paysheets for the pay run ID.

Error Pay End Date Option

This value is used by the Pay Calendar build process to set up the pay calendar. Select the date of the off-cycle calendar to which erred paysheets are moved.

If you select *Next Day*, the Pay Calendar Creation process creates one cycle pay calendar for each on-cycle pay calendar that is created. The pay end date for the off-cycle calendar is one day after the pay end date for the on-cycle pay calendar. For example, if the pay end date for the on-cycle calendar is May 31st, the pay end date for the off-cycle calendar is June 1st.

Warning! If you enter your own end date, you must ensure that a pay calendar has been built for that date before attempting to calculate transferred pay lines.

Processing Control

Industry Select your organization's primary business industry, such as *Core*, *Education*, *Government*, *Retail*, and so on.

Industry Sector Select *None*, *Core*, *Public Sct* (public sector), or *US Federal*.

Employee Type(s) for Paygroup

Employee Type Select the options—*Hourly*, *Exception Hourly*, or *Salaried*—that are valid for this pay group. If you use PeopleSoft Payroll for North America, you also need to designate payroll processing parameters. Otherwise, for employees being paid with PeopleSoft Payroll for North America, leave Print Paysheets selected as the default.

Note. If a specific employee type is not defined on a pay group, a user can't set up that type of employee. For example, if a pay group does not have an employee type of salaried, when an employee is hired, the user can't enter S as the employee type on job.

Print Paysheets If you are using PeopleSoft Payroll for North America, select this check box if the employees in this employee type should always be included when printing paysheets. Employee types for which this check box is deselected still appear on the paysheet pages.

Note. You must check this box if either of the confirmation required check boxes is selected.

Confirmation Required for Job Earnings on Paysheet If you are using PeopleSoft Payroll for North America, select this box to deselect the OK to Pay field on the paysheets by default. OK to Pay tells the system whether to pay an employee or place the record on hold until you review it. Pay Calculation, in turn, processes only those employees who have OK to Pay selected. If you select this option, Print Paysheets must also be selected.

Typically, hourly employees require some sort of positive time input to get paid. For this reason, you might say that confirmation is required. Once you enter their time on the paysheets, you manually select OK to Pay to permit them to be paid.

For exception hourly and salaried employees, you usually enter exception time only as required. Therefore, you might indicate that confirmation is not required. These employees automatically get paid their regular salary or hours each pay cycle, because the paysheets are created with the OK to Pay check box selected.

Confirmation Required for Partial Pay Period on Paysheet

If you are using PeopleSoft Payroll for North America, select this box to control the OK to Pay check box on the paysheet. Whenever there is a mid-period change on the Job record—an employee is hired, is terminated, or changed jobs or pay rates—the system creates partial pay period records due to proration. Typically, if you prorate pay, you should deselect this check box to tell the system that confirmation is not required and to select OK to Pay on the paysheet. If, on the other hand, you want to manually verify the proration for employees, select this option. You can adjust the pay on the paysheets and click the OK to Pay check box. If you select this option, Print Paysheets must also be selected.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Working with Paysheets"

Setting Up Payroll Calculation Parameters for Pay Groups

Access the Pay Group Table - Calc Parameters page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Group Table, Calc Parameters or Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Group Table, Calc Parameters).

The screenshot displays the 'Pay Group Table - Calc Parameters' page. At the top, there are three tabs: 'Definition', 'Process Control', and 'Calc Parameters', with 'Calc Parameters' selected. A 'New' button is located in the top right corner. Below the tabs, the 'Company' is set to 'FRG' (Federal Reserve Board) and the 'Pay Group' is 'F09' (FLSA Exempt Overtime). The 'Effective Date' is '01/01/1980' and the 'Status' is 'Active'. The 'Earnings Program ID' is 'GS' (General Schedule) and the 'Pay Plan' is 'GS' (General Schedule). The 'Holiday Schedule' is 'FHL' (FED Holiday Schedule). Under the 'Earnings' section, there are fields for '*Regular Hours' (FRG), '*Regular Earnings' (FRG), '*Overtime Hours' (FOV), '*Holiday' (FHL), and 'Refund'. To the right, there are fields for 'Default Benefit Program' (F02), 'Retro Pay Program ID', 'Retro Pay Trigger Program ID', and 'Final Check Program ID'. A checkbox for 'FLSA Required' is checked, and there is a button for 'FLSA Period Definition'. At the bottom, there is a section for 'US Federal' parameters, including 'Nonpaid Hours' and 'Interest Earnings Code'. The page footer shows navigation links for 'Pages 1 - 3', 'Pages 4 - 6', and 'Pages 7 - 9'.

Pay Group Table - Calc Parameters page

Pay Group Information

Earnings Program ID	Select a default value for the employee records in this pay group. Earnings Program IDs are set up using the Earnings Program Table component (EARNNS_PROGRAM_TBL) in either Payroll for North American or Payroll Interface. You must set up that component first or leave this field blank for now.
Pay Plan	(USF) Select the pay plan to assign to this pay group.
Holiday Schedule	Select the holiday schedule for the pay group. If you left the Holiday Schedule field blank on the Location Profile page, the system uses the holiday schedule you specify on this page as the default for the worker's job record. You must set up the Holiday Schedule table before making a selection or leave this field blank for now. Note. In Payroll Interface, if you want the third-party payroll system to process holiday pay, on the Holiday Schedule component set up a holiday schedule called NONE.
Default Benefit Program	Select the default benefit/deduction program for the pay group. The system uses this default benefit/deduction program as the default for the employee's job record. The default you enter on this page is edited against the Benefit/Deduction Program Table in the Benefits menu. You must set up that table first, or leave this field blank for now.
Retro Pay Program ID	Select a retro pay program to associate with the pay group. The retro pay program identifies the earnings codes used in retro pay calculations. In each retro pay program, you list earnings codes that are eligible for retro pay, and for each of these earnings codes, you specify the earnings code to be used for paying the retro pay earnings. You define retro pay programs in the Retro Pay Program component. See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i> , "Setting Up the Payroll Process," Defining Retro Pay Programs.

Retro Pay Trigger Program ID

Select a retro pay trigger program to associate with the pay group. The retro pay trigger program controls which record and field changes (on the job record and the additional pay data record) create retro pay requests. The retro pay calculation process then processes these requests to determine how much, if any, retro pay is to be paid because of the changes.

You define retro pay trigger programs in the Retro Pay Trigger Program component.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "Setting Up the Payroll Process," Defining Retro Pay Trigger Programs.

Note. Releases before PeopleSoft Payroll for North America 9.1 generated retro requests using PeopleCode rather than retro pay trigger programs. When you upgrade from one of these earlier releases, use correction mode to enter retro pay trigger programs for the current and history rows on this page. You cannot save changes to this component if there are any rows that have a retro pay program but no retro pay trigger program.

Final Check Program ID To specify a default final check program for the pay group, select the final check program ID that identifies the earnings, deductions, and accruals to be used in final check processing for the pay group.

FLSA Required

(USA) Select this check box if FLSA regulations are to be applied to this pay group. When you select this check box, the *FLSA Period Definition* button appears. If you do not select this check box, the button does not appear and you cannot define FLSA pay periods.

FLSA is for U.S. Payroll only; this check box appears on the page if you have enabled FLSA processing on the FICA/Tax Details page (access through the Company Table – Default Settings page) and on every pay group when applicable.

Note. If FLSA is not selected for a company, it cannot be selected for a pay group within that company. After it has been selected at the company level, it does not have to be selected at the pay group level. However, if FLSA is required for a pay group, it must be selected at both the company and pay group levels.

Note. (USF) If FLSA is required for a whole agency or for most pay groups in an agency, you should deselect the FLSA Required check box and define FLSA requirements on the Agency Table. Remember that if the *FLSA Required* check box isn't selected on the Agency Table, the FLSA Rule for a pay group is set by default to *Higher of FLSA Contractual*.

Note. To be included in FLSA calculation, an employee must have non-exempt status and belong to an FLSA pay group.

Note. When setting up pay groups, do not use the same pay group ID in two separate companies if the companies use different overtime earnings codes for FLSA.

FLSA Period Definition (USA) Click to access the FLSA Period Definition page.

Earnings

Use this group box to define earnings codes for each earnings type.

Regular Hours	Select the appropriate earnings code for the regular hours earnings type.
Overtime Hours (overtime hours earnings type)	Select the appropriate earnings code for the overtime hours earnings type.
Regular Earnings	Select the appropriate earnings code for the regular earnings type.
Holiday	When the system creates paysheets and detects that a holiday falls within the pay period, it uses the earnings code associated with this field. If Holiday Type on the Holiday Schedule Table is Canadian, the system uses this earnings code to set up the statutory holiday earnings on the paysheet. Note. (USF) The system does not enter the holiday earnings code on the paysheet if the employee is in a nonpay status for the entire pay period.
Refund	Enter the earnings code used to refund money to employees who cancel U.S. Savings Bond elections or whose purchases are suspended due to the annual purchase limit. Important! The refund earnings code must be configured appropriately. On the Earnings Table - Taxes page, the Add to Gross and Maintain Earnings Balances check boxes must be selected, and the earnings code must not be subject to any taxes. See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i>, "Defining Earnings Codes and Earnings Programs," Entering Special Options and Tax Methods for Earnings Codes.
(USF) US Federal	
Specify additional earnings codes.	
Nonpay Hours	Enter the earnings code to be entered on the paysheets when the system detects that an employee is on leave without pay or short or long-term disability for an entire pay period. Note. Nonpay hours are included on paysheets only if the employee is in nonpay status for the entire pay period.
Interest Earnings Code	Enter the earnings code used to pay interest on retroactive payments that are over 30 calendar days late. See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i>, "Processing Retro Pay," (USF) Managing Interest Calculations on Retro Pay.

See Also

Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules, page 233

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Setting Up the Payroll Process," Setting Up Retro Pay Processing

(USA) Specifying the FLSA Period Definition

Access the FLSA Period Definition page (click FLSA Period Definition on the Calc Parameters page).

FLSA Period Definition

FLSA Period Definition:

Fixed FLSA Period

FLSA Salaried Hours Used

☐ Fixed Salaried Hours

☒ Unspecified Salaried Hours

FLSA Calendar ID:

FLSA Period in Days:

FLSA Period Definition page

The FLSA Period Definition page changes, depending on which options you select. The following table shows which fields are visible on the page, depending on the FLSA Period Definition you select:

FLSA Period Definition	FLSA Salaried HRS Use: Unspecified or Fixed	Use Basic Formula	FLSA Calendar ID	FLSA Period in Days	FLSA Threshold Hours
Fixed FLSA Period with Fixed Salaried Hrs selected and Use Basic Formula clear	X	X	X	X	

FLSA Period Definition	FLSA Salaried HRS Use: Unspecified or Fixed	Use Basic Formula	FLSA Calendar ID	FLSA Period in Days	FLSA Threshold Hours
<i>Fixed FLSA Period</i> with Fixed Salaried Hrs selected and Use Basic Formula selected	X	X			
<i>Fixed FLSA Period</i> with Unspecified Salaried Hrs selected	X		X	X	
<i>Law Enforcement</i>			X	X	X
<i>Fire Protection</i>			X	X	X

FLSA Period Definition Select the appropriate FLSA period definition:

- *Fixed FLSA Period*: 7 or 14 days. 7 is the default.
- *Fire Protection*: 7 to 28 days.
- *Law Enforcement*: 7 to 28 days.
- User-defined FLSA period definitions are also available in the list.

If you select *Fixed FLSA Period*, the period can only be for 7 or 14 days. There are no FLSA Threshold Hours for employees in the *Fixed FLSA Period*, because threshold hours only apply to law enforcement and fire protection employees.

FLSA Salaried Hours Used

Fixed Salaried Hours Select this option to use the standard hours you entered on the employee's Job record. If you select this option, the *Use Basic Formula* check box appears.

Use Basic Formula If you select this check box, the *FLSA Calendar ID* and *FLSA Period in Days* check boxes disappear. Basic formulas are used only for monthly and semi-monthly pay periods. The FLSA period is assumed to be the same as the Pay Calendar period; hence, no FLSA Calendar ID is required. If you select this check box, you must enter information into the Work Day Hours field on the Job Information page.

Unspecified Salaried Hours	Select this option to use the actual number of hours worked per week by salaried employees to determine their FLSA rate.
FLSA Calendar ID	Select a FLSA calendar ID. The FLSA calendar ID is linked to the FLSA Start Date and FLSA Period in Days fields on the FLSA Calendar Table page, which are used to define the FLSA begin and end dates. Hence, the pay group uses the FLSA Calendar ID to define the FLSA periods. This field is not applicable if you select <i>Basic Rate Formula</i> . If you select <i>Fixed FLSA Period</i> , the prompt list contains only FLSA Calendar IDs with 7 or 14 FLSA Periods in Days. For Fire Protection or Law Enforcement, the prompt list contains FLSA Calendar IDs from 7 to 28 days.
FLSA Period in Days	The length of the FLSA pay period, or the days from the FLSA Begin Date to the FLSA End Date. The system displays it automatically. It is based on the FLSA Period in Days you define on the FLSA Calendar Table. This field is display-only.
FLSA Threshold Hours	The number of hours worked before the FLSA rate applies to Fire Protection and Law Enforcement employees. Both of these types of jobs have different threshold hours defined by FLSA regulations. Both threshold hour schedules are delivered by PeopleSoft and are defined in the FLSA Period Table. You can create user-defined FLSA period definitions with different threshold hour schedules if necessary. See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i>, "(USA) FLSA and Alternative Overtime Calculations."

(E&G) Entering Additional E&G Earnings Codes

Access the Education and Government Additional Earnings Codes page.

Select the appropriate earnings code for each field.

Running Job Code and Pay Group Reports

To run job code and pay group reports, use the Job Code Table Report component (RUN_PER_709C) and Pay Group component (RUN_PAY711).

This section lists the page used to run job code and pay group reports.

Page Used to Run Job Code and Pay Group Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job Code Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table Report, Run Control	Job Code Table report (PER709C) lists all job codes.
Pay Group Report	PRCSRUNCNTL	- Set Up HRMS, Product Related, Payroll for North America, Comp/Earnings Table Reports, Pay Group, Pay Group Report - Set Up HRMS, Product Related, Payroll Interface, Payroll Reports, Pay Group Table, Pay Group Report	The Pay Group report (PAY711) prints each pay group and the processing characteristics that apply to that group.

Chapter 14

(USF) Setting Up Human Resources Management Tables

This chapter discusses how to:

- Set up federal HRMS control tables.
- Run federal HRMS setup reports.
- View the Project Costing and General Ledger Business Unit tables.

Setting Up Federal HRMS Control Tables

To set up federal HRMS control tables, use the Handicap Table component (GVT_HANDICAP_TBL), Legal Authority component (GVT_LEGAL_AUTH_TBL), U.S. County Table component (GVT_COUNTY_TABLE), Nature of Action Table component (GVT_NOAC_TBL), LEO Pay Area USF component (GVT_LEOPAY_AREA_TB), NOA/Legal Authority component (GVT_AUTH_VAL_1), Sub Agency component (GVT_SUB_AGENCY_TBL), Personnel Office ID component (GVT_POI_TABLE), and Personnel Action Rqst Rmks component (GVT_SF50_RMK_TBL).

This section provides an overview of federal HRMS control tables and discusses how to:

- Set up disability codes.
- Set up legal authority codes.
- Set up nature of action codes.
- Set up LEO pay areas.
- Associate nature of action codes with legal authority codes.
- Set up sub-agencies.
- Set up personnel office IDs.
- Specify PAR approving officials.
- Set up PAR remarks.

Understanding Federal HRMS Control Tables

This section discusses the set up of control tables that are specific to federal agencies

When creating personnel action requests, you search fields using information from the Legal Authority table, the Nature of Action table, the PAR Remarks table, and the NOA/Legal Authority 1 table.

When you enter employee-specific information, you use values from the Handicap table and the LEO Pay Area table.

In PeopleSoft HRMS, you use values from the U.S. County table, the Personnel Office ID table, and the Sub-Agency table.

Pages Used to Set Up Federal HRMS Control Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Handicap Table	GVT_HANDICAP_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Handicap Table, Handicap Table	Assign codes to the types of disabilities a person might have. You can set up the table with the disabilities that your agency is likely to use and add more as needed.
Legal Authority	GVT_LEGAL_AUTH_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Legal Authority, Legal Authority	The Legal Authority table provides the values that are used on the Data Control pages for Personnel Action Request (PAR) processing.
U.S. County Table	GVT_COUNTY_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, U.S. County Table, U.S. County Table	View a complete list of counties in the United States. This table populates the County description on the Location Table. PeopleSoft delivers the list of U.S. counties, but you can add or change an entry if needed.
Nature of Action Table	GVT_NOAC_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Nature of Action Table, Nature of Action Table	Review, add, and update codes. This table defines the Nature of Action codes that are used in PeopleSoft Human Resources.

Page Name	Definition Name	Navigation	Usage
Law Enforcement Officers Pay Area Table	GVT_LEOAREA_TABLE	Set Up HRMS, Product Related, Compensation, LEO Pay Area Table USF, Law Enforcement Officers Pay Area Table	Set up special pay areas in the Law Enforcement Officers Pay Area Table . Law enforcement officers in these regions receive additional pay above the base pay for their pay plan, grade, and step. PeopleSoft delivers the current LEO pay areas, and you can update them based on Office of Personnel Management updates that you might receive throughout the year.
NOA/Legal Authority 1	GVT_AUTH_VAL_1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NOA/Legal Authority 1, NOA/Legal Authority 1	Connect the NOA codes that are defined in the Nature of Action table with the legal authorities that are defined in the Legal Authority table. You must have set up nature of action codes and legal authority codes.
Sub-Agency	GVT_SUBAGCY_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Sub-Agency, Sub-Agency	Set up sub-agencies if your agency has multiple organizations that report to OPM as separate entities.
Personnel Office ID Table	GVT_POI_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID, Personnel Office ID Table	Assign an identification number to every personnel office in your agency. Much of the information that you enter is printed on the personnel action requests.
PAR Approving Officials Table	GVT_POI_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID, PAR Approving Officials Table	Enter the names that appear in the routing process section of the PAR.
Personnel Action Rqst Rmks	GVT_SF50_RK_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Action Rqst Rmks, Personnel Action Rqst Rmks	Define standardized remarks to attach to PARs. You use some remarks exactly as they are entered here, but you insert person-specific information into other remarks when you attach the remark at the person level.

Setting Up Disability Codes

Access the Handicap Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Handicap Table, Handicap Table).

Handicap Table

Disability Code: 15

Handicap Table						Customize	Find	View All	First	1 of 1	Last
	*Effective Date	*Status	Disabled	*Description							
1	01/01/1900	Active	☒	Hard of Hearing	+	-					

Handicap Table page

Disabled

Select if the disability code describes what your agency considers a disability. Usually you select this check box. However, if (for example) you set up a disability code to indicate that a person has no disability, leave this check box deselected.

Setting Up Legal Authority Codes

Access the Legal Authority page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Legal Authority, Legal Authority).

Legal Authority

Legal Authority Code: ABR

Legal Authority						Customize	Find	View All	First	1-3 of 3	Last
	Effective Date	Status	Description - Part 1	Description - Part 2							
1	03/01/2000	Active	Reg. 330.608. Agency	Career Transition Program	+	-					
2	04/16/1996	Active	Reg. 330.608		+	-					
3	03/01/1996	Active	Reg. 330.608		+	-					

Legal Authority page

A *legal authority* is the authority that empowers an agency to grant a personnel action request. PeopleSoft delivers your system with a list of legal authorities. If the Office of Personnel Management issues an update of legal authorities, you can keep your system up to date by changing the information in the Legal Authority table.

- Effective Date

When you add a legal authority code to this table, select an effective date early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.
- Description - Part 1 and Description - Part 2

Enter descriptions that appear on the Data Control page (GVT_JOB0) when you process personnel actions for a person.

Setting Up Nature of Action Codes

Access the Nature of Action Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Nature of Action Table, Nature of Action Table).

Nature of Action Table

Action:ADLAdditional Job

Nature of Action Code:141

NOA Description

Find | View All | First1 of 1Last

*Effective Date:01/01/198031

*Status:Active

*Description - Part 1:Reins-Career-Cond

Description - Part 2:

Time NOA is Effective:Opening of Business Day

☒ Required for CPDF

☒ Push Action to Job

☒ IRR Reportable

IRR Type:Not Applicable

Nature of Action Table page

Nature of Action Code

Every Personnel Action Request (PAR) requires a Nature of Action (NOA) code, so every personnel action is described in this table and assigned an NOA code.

PeopleSoft delivers the NOA codes, but you can add or update entries as needed. When entering NOA codes for your agency's internal use, PeopleSoft suggests that you use codes in the 900 series.

Effective Date

When you add a Nature of Action code to this table, select an effective date that is early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time for the NOA code.

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Time NOA is Effective
(time nature of action is effective)

This field designates when the personnel action should take effect. Select *Opening of Business Day* (the default) or *Close of Business Day*.

If you select *(none)*, the system uses the default, *Opening of Business Day*.

In PeopleSoft, all actions are normally assumed to take place at the beginning of business on the effective date. This isn't always the case with the federal government. With *Termination/Non-Pay* actions (NOAs that are in the 300 series and 400 series), the action is effective at *Close Of Business Day* on the effective date. Any personnel action defined with *Close of Business Day* increments the Job effective date by one. The Federal (GVT_JOB) effective date is not affected.

Required for CPDF
(required for central personnel data file)

Select if the NOA code is reportable to the Office of Personnel Management (OPM) from CPDF reports.

Push Action to Job

Select if the nature of action is to be applied to the core PeopleSoft job record (JOB) from the federal government side after saving the personnel action.

IRR Reportable
(individual retirement record reportable)

Select if an NOA code is to be reported to OPM on the IRR. This indicates that an IRR-related NOA code is part of an IRR control record when a separation personnel action is saved.

IRR Type

Select the type of IRR to be generated. Values are *Retirement*, *Transfer/Resignation*, and *Supplemental*.

Setting Up LEO Pay Areas

Access the Law Enforcement Officers Pay Area Table page (Set Up HRMS, Product Related, Compensation, LEO Pay Area Table USF, Law Enforcement Officers Pay Area Table).

Law Enforcement Officers Pay Area Table

LEO Special Pay Area: 1 Boston-Worcester-Lawrence

LEO Pay & Area Table						Customize Find View All [Icon] First 1-2 of 2 Last	
	*Effective Date	*Status as of Effective Date	*Description	LEO Percentage			
1	10/16/1992 [Icon]	Active [Dropdown]	Boston-Worcester-Lawrence	16.00	[+]	[-]	
2	01/01/1900 [Icon]	Active [Dropdown]	Boston-Worcester-Lawrence	0.00	[+]	[-]	

Law Enforcement Officers Pay Area Table page

LEO Percentage (law enforcement officer percentage)

Enter the percentage of base pay that LEOs in this region receive in addition to the base pay set by their pay plan, grade, and step. The amount is reflected on the Compensation Data page (JOB_DATA3) in Administer Workforce.

Associating Nature of Action Codes with Legal Authority Codes

Access the NOA/Legal Authority 1 page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NOA/Legal Authority 1, NOA/Legal Authority 1)..

NOA/Legal Authority 1

Nature of Action Code:001

Legal Authority Code:ADMOPM Directive.

NOA/Legal Authority		Customize	Find	View All	First	1 of 1	Last
	Effective Date	Status					
1	01/01/1980	Active					

NOA/Legal Authority 1 page

When you enter an NOA (nature of action) code on the PAR Data Control page in Administer Workforce and prompt on the Authority (1) field, you see only the valid values from this table. However, for Authority (2), you can select any of the legal authorities that are defined in the Legal Authority table.

Setting Up Sub-Agencies

Access the Sub-Agency page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Sub-Agency, Sub-Agency).

Sub-Agency

Company:KS

Corp for National & Comm Servc

Sub-Agency:00

Sub-Agency

Find | View All | First | 1 of 1 | Last

*Effective Date:01/01/1980

*Status:Active

☒ Report CPDF

Description

Long:Corporation for National and Community Service

*Description:Corporation for National and C

Abbreviation:Corporatio

Sub-Agency page

Sub-Agency

If your agency has multiple organizations that might report to the Office of Personnel Management as separate entities, you define them as distinct sub-agencies for online processing purposes.

Report CPDF (report central personnel data files)

Select if this sub-agency reports CPDF on a regular basis.

Long

Enter a long description of the sub-agency.

Abbreviation

Enter an abbreviated description of the sub-agency.

Setting Up Personnel Office IDs

Access the Personnel Office ID Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID, Personnel Office ID Table).

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Personnel Office ID Table page

Sub-Agency	Select the sub-agency code.
Personnel Officer's Name	Enter the name of the person who is responsible for personnel actions for this office.
OPM Oversight Office (office of personnel management oversight office)	Select the OPM Oversight Office to which you report personnel actions from the available values. The values are stored on the Translate table. To change or add values, inform your project management office of the updates you require.
Automated Submitting Point	The automated submitting point is an informational field and isn't used during PeopleSoft HRMS processing. However, it is required on the OPM form that is used to communicate the establishment of or changes to a Personnel Office Identifier for currently operating personnel offices.
Electronic Commerce Address	This address is for your agency's information only. For example, this might be an email address or a government network ID.

Specifying PAR Approving Officials

Access the PAR Approving Officials Table page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID, PAR Approving Officials Table).

Personnel Office ID Table

PAR Approving Officials Table

Personnel Office

Find | View All | First 1 of 1 Last

Personnel Office ID: 7444 Effective Date: 01/01/1980 Status: Active

Approving Officials

Customize | Find | View All | First 1 of 1 Last

	*Empl ID	Empl Record	*Name	Primary PAR Approving Official	*Title		
1	FRG7008	0	Coppi,Fausto	☐	Clerk-Typist	+	-

PAR Approving Officials Table page

Empl ID (employee ID) Enter an employee ID for each official who approves personnel actions. When you move out of the field, the system populates the Empl Record, Name, and Title fields. You can edit these fields.

Primary PAR Approving Official Select if applicable. This check box is for your information only.
(primary personnel action request approving official)

Setting Up PAR Remarks

Access the Personnel Action Rqst Rmks page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Action Rqst Rmks, Personnel Action Rqst Rmks).

Personnel Action Rqst Rmks

Remark CD: A11

Remark Description

Find | View All | First | 1 of 1 | Last

*Effective Date: 01/01/1980

*Status: Active

Print Priority: 1st Tier

☒ Insertion Required

☐ IRR Reportable

☐ ROST Reportable

Employment under this appointment must not exceed **** working days a

year.

Personnel Action Rqst Rmks page

The Office of Personnel Management (OPM) designates remark codes that begin with A through X. PeopleSoft delivers the current standard OPM PAR remarks, but you need to maintain them, based on OPM updates that you might receive throughout the year. To enter additional remarks for your agency's internal use, use codes that begin with Y or Z. When you upgrade PeopleSoft HRMS, retain your agency-specific remarks.

- Print Priority**

Select the printing priority for the remark. Available values are *1st Tier* and *2nd Tier*. First tier remarks print first on the SF50/52 reports before any second-tier remarks. Therefore, any remark that is defined as *1st Tier* is printed in the order it is listed by the HR personnelist. These are followed by the 2nd tier remarks.
- Insertion Required**

Select if this remark needs employee-specific information. When you select this remark at the person level, this check box is unavailable for entry.

PeopleSoft uses an asterisk (*) to denote person-specific information that is changed by your human resources personnel clerk when the remark is attached to a PAR at the person level.
- IRR Reportable**
(individual retirement record reportable)

Select if this remark is attached to a PAR that is to be printed on an IRR and you want to print the remark on the IRR.
- ROST Reportable**
(Register of Separations and Transfers reportable)

Select to have this remark printed on the ROST.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USF) Generating IRR and ROST Reports"

Running Federal HRMS Setup Reports

This section lists the pages used to run the federal HRMS setup reports.

Pages Used to Run the Federal HRMS Setup Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Run Control	PRCSRUNCNTL	- Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Handicap Table - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Legal Authority Table - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Nature of Action Table - Set Up HRMS, Product Related, Compensation, LEO Pay Area Rpt USF - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, NOA/Authority 1 - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Personnel Office ID Table - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Sub-Agency	Use this page to run these reports: - Handicap Table report (FGPER811) prints all disabilities and their associated codes. - Legal Authority Table report (FGPER812) prints information about the legal authorities you set up in the Legal Authority table. - Nature of Action Table report (FGPER813) generates a list of the codes in the Nature of Action Table. - Law Enforcement Officers Pay Area Table report (FGPER808) lists each LEO Special Pay Area and associated percentage. - NOA Authority 1 report (FGPER814) generates a list of the information in the Nature of Action/Authority 1 Table. - Personnel Office ID Table report (FGPER805) prints information about all Personnel Offices in your agency. - Sub-Agency report (FGPER804) prints all sub-agencies in the Sub-Agency and their associated agencies.

Viewing the Project Costing and General Ledger Business Unit Tables

The PC (project costing) Business Unit Table and GL (General Ledger) Business Unit Table are view-only pages.

PC Business Unit Table

The PC Business Unit table is part of the Project Costing process in PeopleSoft Enterprise Financials, which interacts with the Time and Labor process. If you don't use project costing, you don't need to import the values for this table.

See PeopleSoft Enterprise Time and Labor 9.1 PeopleBook

GL Business Unit Table

The GL Business Unit table is part of the General Ledger process in PeopleSoft Financials that interacts with the Payroll process. If you don't use General Ledger, you don't need to import the values for this table.

See PeopleSoft Enterprise General Ledger PeopleBook

Chapter 15

Setting Up Banks and Bank Branches

This chapter provides an overview of bank and bank branch setup and discusses how to:

- Set up banks and bank branches.
- Set up IBAN information.
- Specify source banks.
- Report on banks and bank branches.

Understanding Bank and Bank Branch Setup

This section discusses:

- Banking setup.
- (GBR) Bank and building society setup in the UK.
- The CI_BANK_EC component interface.

Banking Setup

To set up banks in HRMS:

1. Set up bank information on the Bank Table page (BANK_EC).
2. Specify bank branch information on the Branch Table page (BANK_BRANCH_EC).

Note. There is some additional banking setup required for the UK.

See [Chapter 15, "Setting Up Banks and Bank Branches," \(GBR\) Bank and Building Society Setup in the UK, page 387.](#)

3. Specify source banks for payroll processing on the Source Bank Accounts page.

(GBR) Bank and Building Society Setup in the UK

This section discusses how to set up the pages in the Bank/Branch component for British financial institutions. This setup is required prior to entering employee bank and building society information on the Bank Account Information page.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Bank Account Information.

You must set up every bank or building society that your organization deals with during the course of business. This information is stored in the BANK_EC_TBL and BANK_BRANCH_TBL tables. A third table, PYE_BANKACCT, stores the details of your payee's bank and building society accounts.

For UK banks, set up bank branches on the Bank Table page. For building societies, use the Bank Table page to identify the bank branch that handles clearing for the society. Use the Branch Table page and its associated Building Society Address page, to enter the building society details. This table shows how to complete these pages:

<i>Type of Account</i>	<i>Bank Table Page</i>	<i>Branch Table Page and Building Society Address Page</i>
Bank Branch	Enter the name, address, and phone number of the bank branch.	Leave blank.
Building Society	Enter the name, address, and phone number of the bank branch that handles clearing for the building society.	Enter the building society name and address and the number of the account that the building society has with the clearing bank that is identified on the Bank Table page.

Warning! You must set up a building society on the Branch Table page, linking the society to its clearing bank on the Bank Table page. If you don't set up building societies as described, the BACS interfaces and processes that are provided by Global Payroll for the UK do not generate valid data.

This example shows how a building society is defined on the Branch Table page:

The screenshot displays the 'Branch Table' page in a software interface. At the top, there are two tabs: 'Bank Table' and 'Branch Table', with 'Branch Table' being the active tab. Below the tabs, there are several fields for bank information: 'Country Code' is 'GBR' (United Kingdom), 'Bank ID' is '300000', 'Bank Name' is 'LloydsTSB', 'Bank Type' is 'Commercial', and 'Short Desc' is 'LLDS'. A section titled 'Branch Information' contains a search bar with 'Find | View All | First | 1 of 1 | Last'. Below this, there are fields for '*Bld Soc ID' (NORTHERNROCK), '*Bld Soc Name' (Northern Rock - Gosforth), '*Account Number' (00105678), 'Bank Identifier Code' (LOYDGB21307), and 'AC Branch Name'. A '*Status' dropdown menu is set to 'Active'. There are also '+' and '-' buttons next to the status dropdown. A link labeled 'Address Information' is visible at the bottom right of the Branch Information section.

Example Building Society Setup

In the example, the building society is linked to LloydsTSB bank (bank ID 30000) that handles clearing for the building society. The building society's clearing account is shown in the Account Number field.

The CI_BANK_EC Component Interface

Because there may be a large volume of bank information to set up, you can simplify the process by importing bank information from a Microsoft Excel spreadsheet into the bank setup tables with the use of the CI_BANK_EC component interface that PeopleSoft provides.

You download bank information from a website or service that provides bank information to an Excel spreadsheet and then import the information from the Excel spreadsheet to the CI_BANK_EC component interface, using the Excel to Component Interface utility. The CI_BANK_EC component interface loads the bank information into the BANK_EC table and BANK_BRANCH_TBL in PeopleSoft HRMS.

Note. It is your responsibility to determine which rows to update and which rows to add to the PeopleSoft HRMS database when using the Excel to Component Interface utility.

See Also

PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components

Setting Up Banks and Bank Branches

To set up banks, use the Bank component (BANK_EC). To set up bank branches, use the Bank Branch component (BANK_BRANCH_TBL).

Use the CI_BANK_EC component interface to load the banking data into the tables for this component interface.

See *PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components*

This section discusses how to:

- Identify banks.
- Define bank branches.
- (BRA) Enter Brazilian bank branch information

Pages Used to Set Up Banks and Bank Branches

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Bank Table	BANK_EC	Set Up HRMS, Common Definitions, Banking, Banks, Bank Table	Set up basic information for all financial institutions. You must complete the Bank Table page before you identify a bank with a source bank account.
Branch Table	BANK_BRANCH_EC	Set Up HRMS, Common Definitions, Banking, Banks, Branch Table	Define a bank's branches. Not all countries require bank branch information.
Bank Branch Address	BANK_BRA_ADR_SP	Click the Address Information link on the Branch Table page.	Enter the address for a bank branch.
Bank Branch Brazil	BANKBRANCH_BRA_SEC	Click the Other Information link for a Brazilian bank on the Branch Table page .	Enter additional information for Brazilian bank branches.

Identifying Banks

Access the Bank Table page (Set Up HRMS, Common Definitions, Banking, Banks, Bank Table).

Bank Table		Branch Table	
Country Code:	BRA Brazil	Status:	Active
Bank ID:	B BRASIL	Alternate Bank ID:	001
Bank Type:	General		
*Bank Name:	BANCO DO BRASIL	Short Description:	BB
Bank Identifier Code:			
Country:	BRA Brazil		
Address:	PRAIA DAS CASTANHEIRAS GUARAPAR1 Espirito Santo	Edit Address	
Phone:			
AC Bank Name:			

Bank Table page

Bank ID	System-displayed. There are different formats for each country. Some are numeric, and others are alphanumeric.
Bank Type	Select the type of bank. Values are <i>Commercial</i> , <i>Community</i> , <i>General</i> , <i>Post Bank</i> , and <i>Savings</i> .
Alternate Bank ID	Enter the bank's national ID, if applicable. If the bank participates in an international banking consortium or system, it is given an alternate bank ID that is used in international transactions.
Bank Name	Enter the name of the bank.
Bank Identifier Code	Enter the Bank Identifier Code (BIC) provided by SWIFT. When saved, the system checks that this entry is 8 or 11 characters long. The system does not validate the accuracy of the BIC, only its length.
Country	Select the country where the bank is located.
Address	The bank's address is displayed.
Edit Address	Click the Edit Address link to change address information for a bank.
Phone	Enter the phone number for the bank.

AC Bank Name (alternate character bank name)	This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank name in single-byte, Katakana format.
(GBR) Special Considerations for the UK	
To set up UK bank branches, enter the following information:	
Country Code	Enter <i>GBR</i> .
Bank ID	Enter the sort code for the bank branch. Note. If you're setting up a building society, enter the sort code of the bank branch that handles clearing for the building society. Clearing is normally handled by a bank's head office.
Bank Type	Optional for UK banks.
Alternate Bank ID	Leave blank for UK banks.
Bank Name	Enter a description of the branch. Include the location of the branch, not just the bank name.

Defining Bank Branches

Access the Branch Table page (Set Up HRMS, Common Definitions, Banking, Banks, Branch Table).

Bank Table

Branch Table

Country Code: BRA Brazil

Bank ID: B BRASIL

Bank Name: BANCO DO BRASIL

Bank Type: General

Short Desc: BB

Branch Information

Find | View All | First 1 of 1 Last

*Branch ID: 7096

*Status: Active

*Branch Name: CASTANHEIRAS

Short Name: CASTANHEIR

Bank Identifier Code:

AC Branch Name:

Address Information

Other Information

Branch Table page

Branch ID	Enter the branch ID for the bank. Branch ID formats vary by country.

Branch Name	Enter the name of the bank branch.
Bank Identifier Code	Enter the Bank Identifier Code (BIC) provided by SWIFT. When saved, the system checks that this entry is 8 or 11 characters long. The system does not validate the accuracy of the BIC, only its length.
AC Branch Name (alternate character branch name)	This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the branch name in single-byte, Katakana format.
Address Information	Click the Address Information link to access the Bank Branch Address page.
Other Information	(BRA) Click the Other Information link to access the Bank Branch Brazil page.

(GBR) Special Considerations for the UK

To set up UK building societies, enter the following information on the Branch Table page:

Bld Soc ID (building society ID)	Enter a unique identifier for the building society.
Status	You can enter employee account details only for building societies with an active status.
Bld Soc Name (building society name)	Enter the full name of the building society.
Account Number	Enter the number of the building society's account at the clearing bank.
Address Information	Click the Address Information link to access the Building Society Address page, where you enter the building society's head office address.

Enter Brazilian Bank Branch Information

Access the Bank Branch Brazil page (click the Other Information link on the Branch Table page for a Brazilian bank).

A screenshot of a software dialog box titled "Bank Branch Brazil". The dialog box has a light blue header bar with the title. Below the header is a section titled "Other Information" in a darker blue bar. Under this section, there are three input fields: "Verifier Digit:" with a small rectangular box, "Branch Location:" with a long horizontal box, and "Contact Name:" with a long horizontal box. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Bank Branch Brazil page

Verifier Digit	Enter the bank-assigned verifier digit. File transfers may require the verifier digit.
Branch Location	Enter the bank branch location.
Contact Name	Enter the contact name for the bank branch.

Setting Up IBAN Information

To set up IBAN Information, use the IBAN Country Setup (SETUP_IBAN_TBL) component.

This section provides an overview of IBAN setup and discusses how to set up IBAN information.

Understanding IBAN Setup

The International Bank Account Number (IBAN) is an account number that uniquely identifies a bank account and is assigned according to ISO standards so that it can be used across national borders. PeopleSoft applications can include this information at the bank account level.

To set up IBAN functionality you must select the IBAN enabled field on the IBAN Country Setup page. You can also establish the rules used to create the Basic Bank Account Number (BBAN) on this page. After the IBAN feature is enabled, the IBAN field and Edit IBAN link appears on the Source Bank Account page and the Maintain Bank Account pages for the country.

See Also

[Chapter 15, "Setting Up Banks and Bank Branches," Specifying Source Banks, page 396](#)

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Entering Bank Account Information

Page Used to Set Up IBAN Information

Page Name	Definition Name	Navigation	Usage
IBAN Country Setup	SETUP_IBAN_TBL	Set Up HRMS, Common Definitions, Banking, IBAN Country Setup, IBAN Country Setup	Enable the IBAN feature for a specific country. Create BBAN validation rules.

Setting Up IBAN Information

Access the IBAN Country Setup page (Set Up HRMS, Common Definitions, Banking, IBAN Country Setup, IBAN Country Setup).

IBAN Country Setup

Country: FRA France

IBAN Setup

☒ IBAN Enabled

☐ IBAN Required

Sequence	*Bank Account Field	*Start Position	*Length	Zero Pad		
1	Bank ID	1	5	☐	+	-
2	Branch ID	6	5	☐	+	-
3	Account Number	11	11	☐	+	-
4	Check Digits	22	2	☐	+	-

IBAN Country Setup page

IBAN Enabled

Select this check box to enable the IBAN functionality for this country. If you enable IBAN, the IBAN field and the Edit IBAN link appears when you set up a source bank account page or a payee bank account with this country code.

IBAN Required

Select this check box to require an IBAN value for accounts in this country. If you select this check box, you must complete the IBAN fields when you set up a source bank account or a payee bank account with this country code.

See [Chapter 15, "Setting Up Banks and Bank Branches," Specifying Source Banks, page 396.](#)

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Bank Account Information.

Basic Bank Account Number

Sequence	Enter the order in which the value will appear in the Basic Bank Account Number (BBAN).
Bank Account Field	Select the field used to compose the BBAN.
Start Position	Enter the position where the Bank Account Field will begin.
Length	Enter the number of characters allotted for this Bank Account Field.
Zero Pad	Select this option to fill any difference between Length and the actual Bank Account Field value with zeroes.

Specifying Source Banks

To specify source banks, use the Source Bank Accounts component (SRC_BANK).

This section provides an overview of source banks and discusses how to:

- Define source banks.
- Edit IBAN information.
- (CAN and USA) Specify data for banks in Canada or the U.S.
- (JPN) Specify the account type and company code.

Understanding Source Banks

Source banks are the money sources that payroll disbursements are drawn from. For each source bank, identify the appropriate bank and bank branch, account number, and EFT formats.

For certain countries, such as the U.S., Canada, and Japan, you must set up additional information for source banks, accessed through the Other Required Information link on the Source Bank Accounts page. For countries in Europe, you must define International Bank Account Number (IBAN) information, accessed through the Edit IBAN link on the Source Bank Accounts page.

Payroll Setup

PeopleSoft Enterprise Global Payroll users must link source banks to a pay entity.

See *PeopleSoft Enterprise Global Payroll 9.1 PeopleBook*, "Defining Banking Instructions."

PeopleSoft Enterprise Payroll for North America users must link source banks to a pay group.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "Setting Up Pay Groups," Specifying Banks and Tips Processing.

Pages Used to Specify Source Banks

Page Name	Definition Name	Navigation	Usage
Source Bank Accounts	SRC_BANK	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts, Source Bank Accounts	Assign a source bank ID and define information about the banks that pay out money.
International Bank Account Nbr	BANKACCT_IBAN_SEC	Click the Edit IBAN link on the Source Bank Accounts page.	(BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Enter or edit the International Bank Account Number. Generation of the IBAN is the responsibility of the bank or bank branch servicing the account. This page is only available if the country selected on the Source Bank Accounts page is set up for IBAN on the IBAN Country Setup page.
Canada Bank Additional Data US Bank Additional Data page	SRC_BANK_PY_SP	Click the Other Required Information link on the Source Bank Accounts page.	(CAN and USA) Specify data for banks in Canada or the U.S. This page is only available if you select <i>CAN</i> or <i>USA</i> as the Country Code on the Source Bank Accounts page.
Japan Bank Additional Data	GPJP_SRC_BANK_SEC	Click the Other Required Information link for a Japanese bank on the Source Bank Accounts page.	(JPN) Specify the account type and company code for Japanese banks.

Defining Source Banks

Access the Source Bank Accounts page (Set Up HRMS, Common Definitions, Banking, Source Bank Accounts, Source Bank Accounts).

Source Bank Accounts		Payment ID Assignment	
Source Bank ID:	03032		
*Description:	Credito Emiliano	Status:	Active
Bank Details			
Country Code:	ITA		Italy
*Bank ID:	03032		Credito Emiliano
Bank Branch ID:	01601		Ag.58 Milano
*Account Number:	1234567	Check Digit:	R
*Account Name:	Account 1234567 Name		
*Currency Code:	ITL		Italian Lira
IBAN:	IT95 R030 3201 6011 2345 67		Edit IBAN
AC Account Name:			
EFT Domestic:		Bank Transfer ID:	
EFT Int'l:			

Source Bank Accounts page

Description	Enter the name of the bank.
Country Code	Select the country code where the bank is located.
Bank ID	Select the bank ID.
Bank Branch ID	Select the bank branch ID, if applicable.
Account Number	Enter the bank account number. Each country has its own account number format.
Check Digit	Enter the value used to validate the bank ID, bank branch ID (if applicable), and account number. This field only appears for countries where check digits are used.
	Note. This field is not for IBAN accounts. You enter the IBAN check digit on the International Bank Account Nbr page that you access when you click the Edit IBAN link on this page.
Account Name	Enter the name of the bank account.
Currency Code	Select the currency code.
IBAN	Displays the IBAN. This only appears if the country code is <i>BEL</i> , <i>FRA</i> , <i>DEU</i> , <i>CHE</i> , <i>ITA</i> , <i>ESP</i> , <i>NLD</i> , or <i>GBR</i> .

Edit IBAN

Click this link to access the International Bank Account Nbr (number) page where you can edit the IBAN.

Note. Generation of the IBAN is the exclusive responsibility of the bank or bank branch that services the account.

Depending on the country that you select, you may not have this page. It is used to record information for companies that operate in Europe.

See [Chapter 15, "Setting Up Banks and Bank Branches," Editing IBAN Information, page 399.](#)

Other Required Information

Click this link to access the Additional Data page. Depending on the country that you select, this page might not be available. It is used to record information for companies that operate only in the U.S., Canada, or Japan.

See [Chapter 15, "Setting Up Banks and Bank Branches," \(CAN and USA\) Specifying Data for Banks in Canada or the U.S., page 400.](#)

See [Chapter 15, "Setting Up Banks and Bank Branches," \(JPN\) Specifying the Account Type and Company Code, page 402.](#)

AC Account Name
(alternate character account name)

This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank account name in single-byte, Katakana format.

EFT Domestic (electronic funds transfer domestic)

Specify which EFT format the source bank account accepts. Enter the EFT name for domestic transactions. If the payee or recipient account is domestic, the default EFT name is taken from the EFT Domestic field of the source bank account that you selected. With domestic accounts, the country code is the same as the country code that you selected during installation.

Note. Not applicable in the U.S. or Canada.

Bank Transfer ID

Enter the bank transfer ID that is used to identify banks to clearing systems.

EFT Int'l (electronic funds transfer international)

Enter the EFT name for international transactions. If the payee or recipient account is foreign, the default EFT name is taken from the EFT Int'l field of the source bank account you selected. With foreign accounts, the country code is different from the country code that you selected during installation.

Note. The Payment ID Assignment page, found in this component, is specific to PeopleSoft Global Payroll and is documented in the PeopleSoft Global Payroll documentation.

Editing IBAN Information

Access the International Bank Account Nbr page (click the Edit IBAN link on the Source Bank Accounts page).

International Bank Account Nbr

Country:

IT

Check Digit:

95

Calculate Bank Account Number

Basic Bank Account Number:

R03032016011234567

OK

Cancel

International Bank Account Nbr page

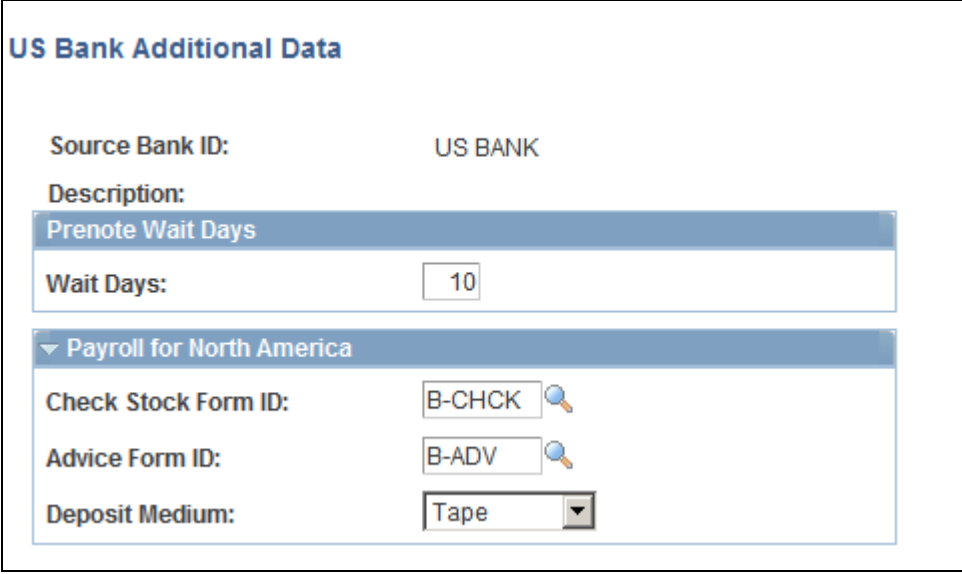
Note. Generation of the IBAN is the exclusive responsibility of the bank or bank branch that services the account.

Note. While saving, the system validates the data. The page will not be saved if any invalid values appear.

Country	Enter or edit the country code used to generate the IBAN.
Check Digit	Enter the number used to validate the IBAN.
Calculate Bank Account Number	Click this button to generate the IBAN. The system populates the Country and Basic Bank Account Number fields using data from the Source Bank Accounts page. You must complete the Check Digit field and correct the defaulted values if necessary.
Basic Bank Account Number	Enter or edit the account number used to generate the IBAN.

(CAN and USA) Specifying Data for Banks in Canada or the U.S.

Access the Canada Bank Additional Data page or the US Bank Additional Data page (click the Other Required Information link for a CAN or USA bank on the Source Bank Accounts page).



US Bank Additional Data

Source Bank ID: US BANK

Description:

Prenote Wait Days

Wait Days: 10

▼ Payroll for North America

Check Stock Form ID: B-CHCK

Advice Form ID: B-ADV

Deposit Medium: Tape

US Bank Additional Data page

(USA) Prenote Wait Days

Wait Days

Enter the number of prenote wait days. What you enter here at the source bank level determines whether the prenotification process is required or not. If you enter 0 in this field, there won't be a prenote generated at the payee level. If you enter any number other than 0 in this field, a prenote is required.

When a company makes transfers to a new account (for example, an employee changes the account for automatic deposits), the banks recommend an initial run with a dummy record to establish that this is a valid (existing) account. The specified waiting period (after the dummy run but before the funds can be transferred to this account) is called the *prenote wait days*.

Note. enable the prenote process to validate the transit numbers, which you specify at the employee level.

Payroll for North America

The Payroll for North America group box only appears if you have PeopleSoft Payroll for North America installed. You only have to define this group box if you have PeopleSoft Payroll for North America.

Check Stock Form ID

If your company generates checks, select the form ID for this source bank account.

Advice Form ID

If your company generates direct deposits, select the form ID for this source bank account.

When assigning numbers for checks or direct deposits, the Pay Confirmation and Paycheck Reprint processes reference this field to determine which check and advice numbers to use. Form IDs are defined in the Form Table.

Deposit Medium

Specify how transactions are transferred to the bank for processing. Options are *Tape*, *EFT*, (electronic funds transfer), *Diskette*, and *Report*.

For PeopleSoft Payroll for North America: This field is for your information only; it does not affect the payroll process in any way.

(CAN) Routing Format

Enter the routing number.

The routing number specifies how, on the tape or file to the bank, the routing number (bank ID) is presented. The number can have a leading 0 and can vary, depending on whether bank ID or the branch ID comes first.

Select the format to apply to the direct payment routing numbers generated by the Direct Deposit Create File - SQR program DDP001CN. The system uses this format to deposit employees' paychecks directly into their personal bank accounts. Valid values are:

- *Lead 0, Bank ID, Branch ID.*
- *Lead 0, Branch ID, Bank ID.*
- *Bank ID, Branch ID (no leading zero).*
- *Branch ID, Bank ID (no leading zero).*

(JPN) Specifying the Account Type and Company Code

Access the Japan Bank Additional Data page (click the Other Required Information link for a Japanese bank on the Source Bank Accounts page).



Japan Bank Additional Data

Source Bank ID: J02

Description: Tokyo Mitsubishi Bank

*Account Type:

Company Code:

Japan Bank Additional Data page

Account Type

The source bank account type. Values are *Checking* and *Regular*.

Company Code

Enter the ID that is assigned to the company by the banking institution.

Reporting on Banks and Bank Branches

To report on banks and bank branches, use the Bank/Branch Report (RUN_PAY701) component.

This section lists the page used to report on banks and bank branches.

Page Used To Report on Banks and Bank Branches

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Bank/Branch Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Banking, Bank/Branch Report, Bank/Branch Report	Run the Bank/Branch report that lists information from the bank and bank branch table.

Chapter 16

Setting Up and Working with ChartFields and ChartField Combinations

This chapter provides an overview of PeopleSoft ChartFields, lists prerequisite integration points, and discusses how to:

- Specify the General Ledger system and version.
- Set up the ChartField configuration template.
- Enter and maintain ChartField values.
- Enter and maintain valid ChartField combinations.
- Review and maintain ChartField transactions.
- Edit ChartField combinations in HRMS transactions.

Note. For customers integrating with PeopleSoft Enterprise 8.4 Financials or higher, most of the components described in this chapter are display only.

Understanding PeopleSoft ChartFields

In PeopleSoft applications, the fields that store your charts of accounts and provide your system with the basic structure to segregate and categorize transactional and budget data are called ChartFields. Each ChartField has its own attributes for maximum efficiency and flexibility in recording, reporting, and analyzing its intended category of data. While a particular ChartField always represents only one category of data, it stores many values that you use to further categorize that same data.

In addition to this basic categorization of a transaction amount using the account ChartField, you can simultaneously record the same transaction by product, project, fund, or any number of categories by using other ChartFields with appropriate values. This creates additional subsets of that same transactional data.

PeopleSoft delivers a set of ChartFields and associated functionality that fully covers most accounting and reporting requirements. ChartFields are designed to be configured by you to meet your specific requirements.

Delivered ChartFields

This table describes the delivered ChartFields:

Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Account	Acct	ACCOUNT (10)	GL_ACCOUNT	Classifies the nature of a transaction. This field is required. Use it for corporate accounts.
Department	Dept ID	DEPTID_CF (10)	DEPARTMENT_RO	Tracks information according to a divisional breakdown of your organization. Can be used to indicate who is responsible for or affected by a transaction.
Project/Grant	Project	PROJECT_ID (15)	PROJECT	Captures additional information useful for grant and project accounting. The Project/Grant ChartField does not have effective dating.
Product	Product	PRODUCT (6)	PRODUCT	Captures additional information useful for profitability and cash flow analysis by product sold or manufactured.
Fund Code	Fund	FUND_CODE (5)	FUND_DEFINITIO N	The primary structural units of Education and Government accounting.
Program Code	Program	PROGRAM_CODE (5)	PROGRAM_DEFINI TION	Tracks expenditures for programs within or across your organizations. Can be used to identify groups of related activities, cost centers, revenue centers, responsibility centers and academic programs.
Class Field	Class	CLASS_FLD (5)	CLASS_PNL	Can be used to identify specific appropriations.

Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Affiliate	Affl	AFFILIATE (5)	N/A	Used to map transactions between business units when using a single interunit account.
Operating Unit	Operating Unit	OPERATING_UNIT (8)	OPERATING_UNIT	Can be used to indicate a location, such as a distribution warehouse or a sales center.
Alternate Account	Alt Account	ALTACCT (10)	ALTACCT	Classifies the nature of a transaction for regulatory authorities. Use it for statutory accounting.
Budget Reference	Budget Ref	BUDGET_REF (8)	BUDREF_PNL	Use to identify unique budgets, when individual budgets share budget keys and overlapping budget periods.
ChartField 1	Chartfield1	CHARTFIELD1 (10)	CHARTFIELD1	Generic expansion ChartField.
ChartField 2	Chartfield2	CHARTFIELD2 (10)	CHARTFIELD2	Generic expansion ChartField.
ChartField 3	Chartfield3	CHARTFIELD3 (10)	CHARTFIELD3	Generic expansion ChartField.
Activity ID	Activity	ACTIVITY_ID (15)	N/A	Activities are the specific tasks that make up a project. The Activity ChartField captures additional information useful for Project Costing. This ChartField does not have effective dating. It is delivered as inactive.

Label Long Name	Label Short Name	ChartField Name (Field Length)	Component Name	Description
Business Unit PC	PC Bus Unit	BUSINESS_UNIT_PC (5)	N/A	Used as an operational subset of an organization to organize project activity independently of the constraints of the standard accounting procedures for the financial posting and reporting of the organization.
Resource Type	RsrcType	RESOURCE_TYPE (5)	N/A	Source types identify the purpose or origin of a transaction. Captures additional information useful for Project Costing. This project costing ChartField does not have effective dating. It is delivered as inactive.
Resource Category	Category	RESOURCE_CATEGORY (5)	N/A	Captures additional information useful for Project Costing. This project costing ChartField does not have effective dating. It is delivered as inactive.
Resource Sub-Category	RsrcSubCat	RESOURCE_SUB_CATEGORY (5)	N/A	Captures additional information useful for Project Costing. This project costing ChartField does not have effective dating. It is delivered as inactive.
Fund Affiliate	Fund Affil	AFFILIATE_INTRA 1 (10)	N/A	Use to correlate transactions between funds when using a single intraunit account. It is delivered as inactive.

<i>Label Long Name</i>	<i>Label Short Name</i>	<i>ChartField Name (Field Length)</i>	<i>Component Name</i>	<i>Description</i>
Operating Unit Affiliate	Oper Unit Affil	AFFILIATE_INTRA 2 (10)	N/A	Use to correlate transactions between operating units when using a single intraunit account. It is delivered as inactive.

Note. N/A means not applicable.

Prerequisites

This table describes the service operations that you must configure in the HRMS database to implement the ChartField and ChartField combination functionality:

<i>Service Operation</i>	<i>Description</i>
RELEASE_REQUEST	HRMS requests an update of the General Ledger version from Financials.
RELEASE_RESPONSE	HRMS receives the update of the General Ledger version from Financials.
FSCM_CF_CONFIG	HRMS receives the specific ChartField configuration template from Financials.
One integration point for each GL ChartField	HRMS receives the ChartField values published from the Financials database. <u>See Chapter 16, "Setting Up and Working with ChartFields and ChartField Combinations," Entering and Maintaining ChartField Values, page 418.</u>
HR_ACCT_CD_LOAD	HRMS receives the combination codes imported from the Financials database or flat file and populates the GL Account Code table (GL_ACCT_CD_TBL).
HR_CHARTFLD_COMBO_SYNC	HRMS receives the service operation published by the Financials database to keep the Speed Type table up to date.
COMBO_CF_EDIT_REQUEST	HRMS sends a request to the Financials database (8.4.01 or higher version) to validate a combination code.
COMBO_CF_EDIT_REPLY	HRMS receives and processes the response from the Financials database to a request for validation of a combination code.

Note. Most of these service operations require that you use PeopleSoft Enterprise General Ledger in a version that is capable of using Integration Broker.

See Also

Interactive Services Repository in the Implementation Guide section of the My Customer Support website

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Chapter 38, "Working with Integration Points in Enterprise HRMS," page 941

Specifying the General Ledger System and Version

This section provides a comparison of functionality for different setup options and discusses how to:

- Specify PeopleSoft Enterprise General Ledger.
- Specify other general ledger systems.

Understanding Comparison by General Ledger System and Version

The setup of the General Ledger indicator and General Ledger version on the Installation table impacts the ChartField combination edit functionality and the behavior of the ChartField pages.

This table compares the ChartField functionality for the different combinations of General Ledger indicator and version on the Installation table:

General Ledger Indicator	General Ledger Version	Update ChartField Configuration Template	Update or Add Individual ChartField Values	Combination validation using Integration Broker
Deselected	N/A	Yes	Yes, except Department ChartField	No
Selected	N/A	No. Use delivered ChartField template	Yes, except Department ChartField	No
Selected	Below 8.40.00	No. Use delivered ChartField template	No. Review only.	No
Selected	8.40.00	No. ChartField Template updated by PeopleSoft Financials	No. Review only.	No
Selected	8.40.01 and above	No. ChartField Template updated by PeopleSoft Financials	No. Review only.	Yes

General Ledger Indicator	General Ledger Version	Update ChartField Configuration Template	Update or Add Individual ChartField Values	Combination validation using Integration Broker
Selected	9.0	No. ChartField Template updated by PeopleSoft Financials, including Project Costing ChartFields, if applicable, if Project Costing is selected on the Installation Table.	No. Review only.	Yes

Note. The Department ChartField is always set up as read only. Changes made to the Department table are automatically reflected in the Department ChartField.

See Also

Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults, page 129

Pages Used to Specify General Ledger System and Version

Page Name	Definition Name	Navigation	Usage
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table, Products	Specify the PeopleSoft applications for your installation.
Product Specific	INSTALLATION_TBL1A	Set Up HRMS, Install, Installation Table, Product Specific	Enter product- and industry-specific installation information.

See Also

Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults, page 129

Specifying PeopleSoft Enterprise General Ledger

To specify and update the PeopleSoft Enterprise General Ledger system and version:

1. Select the General Ledger and Project Costing indicators on the Installation Table - Products page (INSTALLATION_TBL1).

2. Click the Update Version button in the General Ledger group box on the Installation Table - Product Specific page (INSTALLATION_TBL1A).

This button triggers a request to the Financials database and updates the GL version automatically.

Note. The default GL version is *N/A*, which you can update using the Update Version button if you use Enterprise Financials 8.4 or higher for original ChartFields, or Enterprise Financials 9.0 for project ChartFields.

Specifying Other General Ledger Systems

If you do not use PeopleSoft Enterprise General Ledger, do not select the General Ledger check box on the Installation Table - Products page. The system displays *N/A* as the GL version.

If you select the Project Costing check box on the Installation Table - Products page but are not using PeopleSoft Enterprise General Ledger, Project Costing ChartFields will be available to you for editing, but no validation with Financials is performed.

If Payroll for North America supports your General Ledger system, follow the system configuration instructions in the related documentation.

Setting Up the ChartField Configuration Template

To update the standard ChartField configuration template, use the Standard Configuration (STANDARD_CF_TMPLT) component.

This section provides an overview of standard ChartField configuration and discusses how to:

- Import the ChartField configuration from PeopleSoft Enterprise Financials.
- Review or update the standard ChartField configuration template.

Understanding Standard ChartField Configuration

PeopleSoft delivers the standard ChartField configuration template with two different ChartField types: original and project costing. You can access these ChartFields through the Standard ChartField Configuration page.

Note. The ChartField configuration template is review only if you use PeopleSoft Financials. Modifications to this ChartField configuration template should be done in the Financials system. If you use Financials 8.40 or above for original ChartFields, or Financials 9.0 for project costing ChartFields, configuration changes are sent to HCM by the FSCM_CF_CONFIG service operation.

Original ChartFields

PeopleSoft delivers the standard ChartField configuration template with fourteen active and two inactive original ChartFields in the following sequence:

- Account
- Department
- Project/Grant
- Product
- Fund Code
- Program Code
- Class Field
- Affiliate
- Operating Unit
- Alternate Account
- Budget Reference
- Chartfield 1
- Chartfield 2
- Chartfield 3
- Fund Affiliate (inactive)
- Operating Unit Affiliate (inactive)

Note. Original ChartField integration is available to those organizations that are on PeopleSoft Enterprise Financials 8.4 or higher.

Project Costing ChartFields

PeopleSoft delivers the standard ChartField configuration template with six project costing ChartFields, which have the following display order:

- Business Unit PC
- Project/Grant
- Activity ID
- Resource Type
- Resource Category
- Resource Sub-Category

Important! Project costing ChartFields are unique in that their display order is always the same in relationship to the position of the Project/Grant ChartField. When changing the field display order, all project costing ChartFields move together in a block; you can change the display order of a project costing ChartField but the other five ChartFields will remain in the same order in relation to that project costing ChartField.

Note. Project Costing ChartField integration is available to those organizations that are on PeopleSoft Enterprise Financials 9.0. If your organization does not integrate with PeopleSoft Financials but you use PeopleSoft Project Costing, then the attributes of the project costing ChartFields can be modified in the standard ChartField configuration template.

See *PeopleSoft Enterprise Project Costing PeopleBook*

Modifying the ChartField Configuration Template

If you do not use PeopleSoft Enterprise General Ledger, you can use the Standard ChartField Configuration page to make the following modifications to the standard ChartField configuration:

- Change the display order of ChartFields on pages and reports.
- Relabel long and short names (descriptions) of ChartFields.
- Inactivate or activate ChartFields.

Inactivated ChartFields are not displayed on pages, reports, or in prompt lists. They are not included in indexes. While not displayed, they are not removed from records or pages. This significantly reduces configuration time and effort.

- Change the display length of ChartFields on pages and reports.
- Change Related ChartFields for IntraUnit Affiliate ChartFields.

Pages Used to Review or Update the Standard ChartField Configuration Template

Note. ChartField Configuration Template is review only when you are using PeopleSoft Enterprise Financials.

Page Name	Definition Name	Navigation	Usage
Standard ChartField Configuration	STANDARD_CF_TMPLT	Set Up HRMS, Common Definitions, ChartField Configuration, Standard Configuration, Standard ChartField Configuration	Activate ChartFields to make them available on the ChartField Values page. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Action Status	STANDARD_CF_LOG	Click the Configuration Status button on the Standard ChartField Configuration page.	View the status of ChartField changes. The report is produced by the PAY_CONFIG report.
ChartField Labels	STANDARD_CFLBL_LNG	Click Label Details on the Action Status page.	View changes of ChartField labels for both base language and related language.

Importing the ChartField Configuration From PeopleSoft Enterprise Financials

If you integrate with PeopleSoft Enterprise Financials 8.40 or above for original ChartFields, or Financials 9.0 for project ChartFields, the system automatically sends the FSCM_CF_CONFIG service operation from the Financials database to the HCM database when the ChartField Configuration process (PYCONFIG) completes successfully in the Financials database.

The FSCM_CF_CONFIG service operation consists of Financials's latest ChartField template along with all corresponding ChartField labels. Upon receiving the service operation, the HCM database compares the configuration template and labels and generates the actions required to perform ChartField changes in HCM. These pending ChartField change actions reside on the Action Log file. You can review these changes on the Action Status page and determine the time to apply them to your system. Use controls on the Standard ChartField Configuration page to review the configuration status and apply the changes.

Reviewing or Updating the Standard ChartField Configuration Template

Access the Standard ChartField Configuration page (Set Up HRMS, Common Definitions, ChartField Configuration, Standard Configuration, Standard ChartField Configuration).

Standard ChartField Configuration

	Status	Order	Field Long Name	Field Short Name	Display Length	Affiliate Type	IntraUnit Related ChartField
☐	Active	1	Account	Acct	10		
☐	Active	2	Department	Dept ID	10		
☐	Active	3	Project/Grant	Project	15		
☐	Active	4	Product	Product	6		
☐	Active	5	Fund Code	Fund	5		
☐	Active	6	Program Code	Program	5		
☐	Active	7	Class Field	Class	5		
☐	Active	8	Affiliate	Affl	5	InterUnit	Business Unit
☐	Active	9	Operating Unit	Operating Unit	8		
☐	Active	10	Alternate Account	Alt Account	10		
☐	Active	11	Budget Reference	Budget Ref	8		
☐	Active	12	Chartfield 1	Chartfield1	10		
☐	Active	13	Chartfield 2	Chartfield2	10		
☐	Active	14	Chartfield 3	Chartfield3	10		
☐	Inactive	99	Activity ID	Activity	15		
☐	Inactive	99	Business Unit PC	PC Bus Unit	5		
☐	Inactive	99	Resource Category	Category	5		
☐	Inactive	99	Resource Sub-Category	RsrcSubCat	5		
☐	Inactive	99	Resource Type	RsrcType	5		
☐	Inactive	99	Fund Affiliate	Fund Affil	10	IntraUnit	
☐	Inactive	99	Operating Unit Affiliate	Oper Unit Affil	10	IntraUnit	

[Process Monitor](#)

Standard ChartField Configuration page

The Standard ChartField Configuration page initially displays the ChartFields as delivered by PeopleSoft.

Status

An active ChartField displays on pages, reports and prompt lists. An inactive ChartField is not displayed on pages, reports and prompt lists, but it is not removed from records and pages.

Fund Affiliate, Operating Unit Affiliate, and the Project Costing ChartFields are delivered inactive but can be activated if the delivered active ChartFields are not sufficient for your requirements.

Warning! Do not change the status of a ChartField after you have run the full configuration and are using the system in production. Status determines whether ChartFields are displayed on pages, reports and prompt lists throughout the system.

Order	Change the order of display by changing the sequence of order numbers in this field. Inactive ChartFields have the order value of 99. Active ChartFields require an order number. When you activate an inactive ChartField, the system assigns it the next available number, which you can change to place the newly activated ChartField in any desired sequence. When you save the page, the system completes the final reordering to remove gaps or duplicates in the numbering sequence. Important! Project costing ChartFields are always the same in relationship to the position of the Project/Grant ChartField. When changing the field display order, all project costing ChartFields move together in a block.
Field Long Name and Field Short Name	Enter a new long name and short name to relabel the description of a ChartField. These names are displayed on pages, reports and prompt lists rather than the database field name of the ChartField.
Display Length	Enter a new value to change display length on pages. The display length cannot be greater than the actual field length of the ChartField.
Affiliate Type	An Affiliate ChartField is either an InterUnit or IntraUnit affiliate. Standard ChartFields have no affiliate type.
IntraUnit Related ChartField	A unique intraunit related ChartField of the same or smaller ChartField length must be specified for each intraunit affiliate ChartField that is active. (Business Unit is required for the InterUnit Affiliate ChartField.)
Activate	To activate an inactive ChartField, click the check box next to the field you want to activate and then click the Activate button.
Inactivate	To inactivate an active ChartField, click the check box next to the field you want to inactivate and then click the Inactivate button. Warning! Do not inactivate a ChartField if you have transaction data posted to that ChartField. If you do, you will not be able to view that ChartField on pages and reports.
Impact	Click to run the ChartField Configuration PSJob process (PYCONFIG) in report mode to analyze the ChartFields changes and determine the impact of applying the new template.
Configuration Status	Click to access the Action Status page where you can view the standard ChartField activity log and pending changes, including changes that have been subscribed to from Financials but not yet applied. Before applying the subscribed changes, view their impact by clicking the Impact button. If you have saved changes but want to cancel them before applying them, use the Configuration Status - Action Status page to cancel the undesired configuration actions. This resets the ChartField to its previous configuration.

Apply

Click to run the ChartField Configuration PSJob process (PYCONFIG) in update mode to apply the ChartField configurations changes.

Warning! If you make any changes to the Standard Configuration pages, you must run the ChartField Configuration process in update mode to apply those changes before they take effect.

After you apply your changes, the system displays only the active ChartFields. ChartFields display in the order and with the labels defined in this standard configuration.

Entering and Maintaining ChartField Values

To enter and maintain ChartField values, use the ChartField Values component (DEFINE_CF_VALUE).

This section provides overviews of ChartField and discusses how to:

- Add project and grant values.
- Add alternate account values.

Understanding ChartField Import from Financials

If you use PeopleSoft Enterprise Financials release 8.0 or later, import ChartField values from the Financials database and keep them up to date using Integration Broker.

This table lists the service operations used to import original ChartFields from Financials by Integration Broker:

<i>ChartField</i>	<i>Service Operation</i>
Account	ACCOUNT_CHARTFIELD_FULLSYNC ACCOUNT_CHARTFIELD_SYNC
Project/Grant	PROJECT_FULLSYNC PROJECT_SYNC
Product	PRODUCT_CHARTFIELD_FULLSYNC PRODUCT_CHARTFIELD_SYNC
Fund Code	FUND_LOAD FUND_CF_SYNC

ChartField	Service Operation
Program Code	PROGRAM_CF_FULLSYNC PROGRAM_CF_SYNC
Class Field	CLASS_CF_FULLSYNC CLASS_CF_SYNC
Operating Unit	OPER_UNIT_CF_FULLSYNC OPER_UNIT_CF_SYNC
Alternate Account	ALTACCT_CF_FULLSYNC ALTACCT_CF_SYNC
Budget Reference	BUDGET_REF_CF_FULLSYNC BUDGET_REF_CF_SYNC
ChartField 1	CHARTFIELD1_FULLSYNC CHARTFIELD1_SYNC
ChartField 2	CHARTFIELD2_FULLSYNC CHARTFIELD2_SYNC
ChartField 3	CHARTFIELD3_FULLSYNC CHARTFIELD3_SYNC

You can view the imported ChartField values from the ChartField Values page.

This table lists the additional service operations used to import Project Costing ChartFields from Financials 9.0 by Integration Broker:

ChartField	Service Operation	Purpose
Business Unit PC	BUS_UNIT_PC_FULLSYNC BUS_UNIT_PC_SYNC	Provide integration of business unit information between Financials and HCM.
Project/Grant	PROJECT_FULLSYNC PROJECT_SYNC	Provide the project, general information, and descriptions between Financials and HCM

ChartField	Service Operation	Purpose
Activity ID	PROJECT_ACTIVITY_FULLSYNC PROJECT_ACTIVITY_SYNC	The PROJECT_ACTIVITY_FULLSYNC messaging publishes all the rows in the PROJ_ACTIVITY table. The PROJECT_ACTIVITY_SYNC provides changes in the activities for the project, general information, and descriptions between Financials and HCM.
Resource Category	RESOURCE_CAT_FULLSYNC RESOURCE_CAT_SYNC	Provide the full table data as well as changes to the resource category table from Financials to HCM.
Resource Sub-Category	RESOURCE_SUB_CAT_FULLSYNC RESOURCE_SUB_CAT_SYNC	Provide the full table data as well as changes to the resource subcategory table from FMS to HCM.
Resource Type	RESOURCE_TYPE_FULLSYNC RESOURCE_TYPE_SYNC	The RESOURCE_TYPE_FULLSYNPC messaging provides the complete resource table information in the message from Financials to HCM. The RESOURCE_TYPE_SYNC messaging provides the changes only to HCM.

Note. In PeopleSoft Financials, combination editing does not support the publishing of detail project ChartFields to HCM since the source record is the COMBO_DATA_TBL, which does not include the detail project ChartFields. The only project ChartField that is published is PROJECT_ID.

See Also

Interactive Services Repository in the Implementation Guide section of My Oracle Support

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Chapter 38, "Working with Integration Points in Enterprise HRMS," page 941

Understanding ChartField Values for Other Financials Systems

If you do not integrate with PeopleSoft Enterprise Financials, or the Financials system does not have Integration Broker capability, you must directly enter and maintain ChartField values in the HCM database.

The active ChartFields on the Standard ChartField Configuration page determines the pages that are available for entering ChartField values.

Note. PeopleSoft recommends that you not use special characters and embedded blanks in ChartField values. Use the generally accepted alphanumeric characters and the underscore. Special characters and embedded blanks can be problematic and in particular can cause problems in some background processes.

Other than the Project ChartField, all changes to the definition of a ChartField value are effective-dated. Therefore, you can establish when you want to *activate* a department, *introduce* a product line, or *close* an account. Use effective dating with activation and inactivation functionality to maintain a full history of all changes or additions, to provide a complete audit trail, and to make possible historical comparisons with past, present, or future conditions. When you no longer use a certain ChartField value, add a row to create an effective-dated *inactive* entry, instead of inactivating the original row. If you simply make the existing row *inactive*, you will have no history of its time as an active ChartField value.

After you initially populate the ChartField tables, you can maintain them from the ChartField Values page.

Understanding Affiliate ChartFields

If your organization uses commitment accounting, use affiliate ChartField values when interunit or intraunit transactions are maintained using the same account ChartField values among several related entities (such as business units, funds, or operating units). For example, each entity might use account 140000 as both an interunit receivables and payables account. Each entity could have a different account. However, in each instance an affiliate ChartField value must be assigned to the accounting line to identify the entity with which the receivable or payable is shared.

PeopleSoft delivers the following affiliate ChartFields:

- Affiliate ChartField.
Used only for *interunit* accounting in association with business unit.
- Fund affiliate ChartField.
Used for *intraunit* accounting between entities.
- Operating unit affiliate ChartField.
Used for *intraunit* accounting between entities.

Affiliate ChartField values are the values of the related ChartField. In other words, there is no separate affiliate ChartField page where you enter affiliate values as with the stand alone ChartFields, such as account or department.

Business unit is required as the interunit-related ChartField for affiliate. It provides the values available in the list box for the Affiliate field on the Journal Entry page.

Understanding Project Costing ChartFields

In Project Costing, you can define dependencies between resource types, categories, and sub-categories. These relationships control data entry and help reduce errors. If you use PeopleSoft Financials, specify these options on the Project Costing Definition page in the Project Costing application.

PeopleSoft delivers the following project costing ChartFields:

- Resource Type
- Resource Category
- Resource Sub-Category

Resource types can be as general or as specific as needed. For example, you can use a labor resource type to track total project labor costs, or use overtime labor and standard labor resource types to track overtime and standard labor separately.

You can combine categories and sub-categories in resource groups for greater flexibility and granularity for tracking and analyzing costs for reporting and analysis. For example, you can divide a labor resource type into different categories of labor, such as architect labor, carpenter labor, and plumber labor, and you can create sub-categories for regular hours and overtime hours. By using these categories and sub-categories, you can track items such as total labor costs for a project, total overtime hours, architect overtime hours, and carpenter standard hours.

Resource types, categories, and sub-categories provide flexibility for defining transactions. You can define relationships between these fields to control data-entry options for specific fields. The relationships can be one-to-one or one-to-many. If you relate resource types to specific categories, and assign a resource type to a transaction, you can assign a resource category only if it is related to the resource type. For example, a transaction with a labor resource type can only be entered in a resource category that is related to labor. The same is true for relationships between resource categories and resource subcategories.

Pages Used to Set Up and Review ChartFields

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ChartField Values	DEFINE_CF_VALUES	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Values, ChartField Values	Displays the links to the components of the <i>active</i> ChartFields. Click the link of the component you want to access. Note. This page only displays links to the components of those ChartFields you activated on the Standard ChartField Configuration page.
GL Account Table	GL_ACCOUNT	Click the Account link on the ChartField Values page.	Set up new account ChartField values. Account values are used in combination with other ChartFields values to create valid ChartField Combinations. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Department	DEPT_CHARTFIELD	Click the Department link on the ChartField Values page.	Review a department. Departments typically represent a divisional classification of a larger entity in your organization (such as a profit center, an operating unit, a school within a university, or a bureau of a government). Its emphasis is usually on budget and responsibility accounting. Note. This page is not available for entry.
Project/Grant	PROJECT_CF	Click the Project/Grant link on the ChartField Values page.	Add project values, set up project start and end dates, and project status. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Product	PRODUCT	Click the Product link on the ChartField Values page.	Add product codes. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Fund Code	FUND_DEFINITION	Click the Fund Code link on the ChartField Values page.	Define fund values for all types of funds. Funds are primary structural units for education and government accounting. Funds are maintained as a balanced set of accounts and are used to present financials statements. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.

Page Name	Definition Name	Navigation	Usage
Program Code	PROGRAM_DEFINITION	Click the Program Code link on the ChartField Values page.	Set up codes to enable financial tracking of programs. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Class Field	CLASS_PNL	Click the Class Field link on the ChartField Values page.	Set up codes to enable financial tracking of class amounts, such as salaries or bonuses. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Operating Unit	OPERATING_UNIT	Click the Operating Unit link on the ChartField Values page.	Set up codes to identify a unit of operation for financial tracking. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Alternate Account	ALTACCOUNT	Click the Alternate Account link on the ChartField Values page.	Set up new alternate account ChartField values. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Budget Reference	BUDREF_PNL	Click the Budget Reference link on the ChartField Values page.	Set up unique budgets where budgets share budget keys and overlapping periods. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ChartField 1	CHARTFIELD1	Click the ChartField 1 link on the ChartField Values page.	Set up new account ChartField 1 values. ChartField 1 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
ChartField 2	CHARTFIELD2	Click the ChartField 2 link on the ChartField Values page.	Set up new account ChartField 2 values. ChartField 2 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
ChartField 3	CHARTFIELD3	Click the ChartField 3 link on the ChartField Values page.	Set up new account ChartField 3 values. ChartField 3 is a ready-to-configure ChartField. Activate and set up when you require a ChartField in addition to the other delivered ChartFields. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Business Unit PC	BUSINESS_UNIT_PC	Click the Business Unit PC link on the ChartField Values page.	Set up business units for project costing to plan projects and gather business data without the constraints of the enterprise's standard accounting procedures for financial posting and reporting. The project costing business unit determines the values available for the Project ID, Activity ID, Resource Type, Resource Category, and Resource Sub-Category fields. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Activity ID	ACTIVITY_ID	Click the Activity ID link on the ChartField Values page.	(Optional) Create standard activity types to facilitate reporting and analysis. Activity is dependent on the project costing business unit. The Business Unit PC and Project ID values must be selected before you can select the Activity ID value. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Resource Type	RESOURCE_TYPE	Click the Resource Type link on the ChartField Values page.	Define resource types that you can assign to individual transactions to identify the transaction's purpose. Resource types are necessary for Project Costing resource groups, reports, and processes to function properly; if not implemented, these source types must still be configured. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Resource Category	RESOURCE_CATEGORY	Click the Resource Category link on the ChartField Values page.	(Optional) Set up resource categories to further define resource types. You can combine categories in resource groups for greater flexibility and granularity for tracking and analyzing costs for reporting and analysis. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.
Resource Sub-Category	RESOURCE_SUB_CAT	Click the Resource Category link on the ChartField Values page.	(Optional) Set up sub-categories to further define categories and resource types. You can combine categories and sub-categories in resource groups for greater flexibility and granularity for tracking and analyzing costs for reporting and analysis. Note. This page is not available for entry if you are integrating with PeopleSoft Financials.

Adding Project and Grant Values

Access the Project/Grant page (click the Project/Grant link on the ChartField Values page).

Project/Grant

SetID: SHARE

Project: AD PROJ-CA

*Description: ACCT_CD

*Integration: CAN01

Start Date:

Business Unit: CAN01

Status: Active

End Date:

Project Status			Customize Find View All First 1 of 1 Last	
Effective Date	*Project Status	Description		
08/25/2009			+	-

Project/Grant page

- Integration

Use to select an integration template for the project and project level.
- Start Date and End Date

These fields are for information only. There is no processing behind them.
- Project Status

Enter the effective date and select a project status to indicate the various stages of the life cycle for the project.
- Note.

These fields are for information only.

Adding Alternate Account Values

Access the Alternate Account page (click the Alternate Account link on the ChartField Values page).

Alternate Account

Set ID: SHARE

Alternate Account: 2000

Effective Date

Find | View All First 1 of 1 Last

*Effective Date:

01/01/1900

Status:

Active

+ -

*Description:

ACCT_CD

☐ Control Flag

*Short Description:

ACCT OLD

Long Description:

Monetary Account Type

☐

☐ Statistical Account

Alternate Account page

The PeopleSoft alternate account feature enables you to enter a statutory chart of accounts as well as analytic or primary accounts at the detail transaction level. The alternate account produces journal line or transaction level balances for statutory reporting requirements. The primary account ChartField contains the corporate accounts, and alternate account ChartField contains the statutory accounts. This is useful for organizations that have two different reporting requirements—one for internal management or a corporate parent, and another for a local jurisdiction or national government.

In PeopleSoft applications, the analytic or primary account ChartField is ACCOUNT.

Local regulatory authorities often require *statutory* accounts. In PeopleSoft applications, this is termed the alternate account ChartField (ALTACCT).

You link alternate account ChartField values with account ChartField values. When you enter values for the account ChartField, the system enters the associated alternate account value. When you enter values for the alternate account ChartField, the system enters the associated account value. You can override the default values by selecting another value from the prompt list. The system displays only account values that you have mapped to the account or alternate account ChartField.

Note. You can map alternate account ChartFields only to account ChartFields with the same attributes unless they have a different SetID.

Long Description	Optionally, you can enter the purpose or use of the alternate account, and an explanation of the type of transactions that are to be posted to it.
	Note. This field is for information only.
Monetary Account Type	Select from the types previously defined on the Account Types page.
	Note. This field is for information only.

Statistical Account	Used for statistical amounts, not monetary amounts. If you select the check box, you must specify a unit of measure.
	Note. This field is for information only.
Control Flag	Select to indicate that you can update this alternate account only by using the Journal Generator. A control account represents a summarization of detail from an application.
	Note. This field is for information only.

Entering and Maintaining Valid ChartField Combinations

To populate HRMS with valid ChartField combinations, use the Load Combination Code Table (RUN_BUD003) and Combination Code Table (VALID_COMBO_TABLE) components.

This section provides overviews of combination codes, valid combination loading, and speed types and discusses how to:

- Run the Load Combination Code process.
- Define combination codes.

Understanding Combination Codes

A combination code is a key that defines a combination of ChartFields. When you run processes to post transactions to the general ledger, the combination code identifies the ChartFields to include on each transaction.

A valid combination code is a combination of ChartFields that are valid in general ledger. Store valid combination codes in the Valid Combination table (VALID_COMBO_TBL) to be used by the ChartField combination validation process.

Note. If you are not using valid combination codes and want to be able to enter any combination of ChartFields on the transaction pages, do not populate the Combination Code table. The system populates the ChartField Transaction table (ACCT_CD_TABLE) with the ChartField combinations you use so that you can track them and reuse them.

See Also

Chapter 16, "Setting Up and Working with ChartFields and ChartField Combinations," Editing ChartField Combinations in HRMS Transactions, page 440

Understanding Valid Combination Table Loading

This section discusses three methods of entering valid combination codes into the Valid Combination table. The method you use depends primarily on which General Ledger system and version you use.

Importing from the Enterprise Financials Database

If you integrate with PeopleSoft Financials 8.0 or later, you can import the valid ChartField Combinations from the Financials database and keep them up to date using Integration Broker.

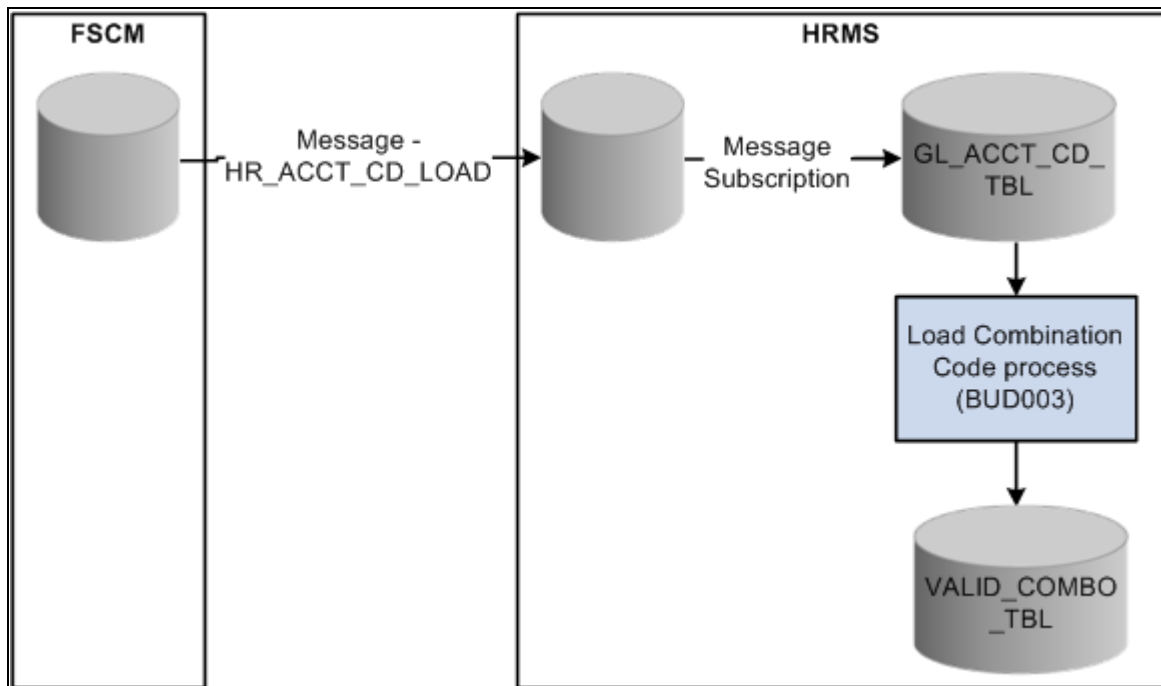
To import valid combinations from Financials:

1. Publish combination data information from Financials (FSCM) to HCM using the HR_ACCT_CD_LOAD Integration Broker service operation.

When HRMS receives this service operation, the handler arranges the data in the correct layout and populates the GL_ACCT_CD_TBL.

2. Run the Load Combination Code SQR process (BUD003) to populate the Valid Combination table.

This diagram illustrates importing valid combination codes from the Financials database as described above:



Importing valid combination codes from the Financials database

Flat File Loading

If you integrate with a financials system that does not have Integration Broker capability, you can use the Inbound Flat File process to load and maintain the Valid Combination table (VALID_COMBO_TBL).

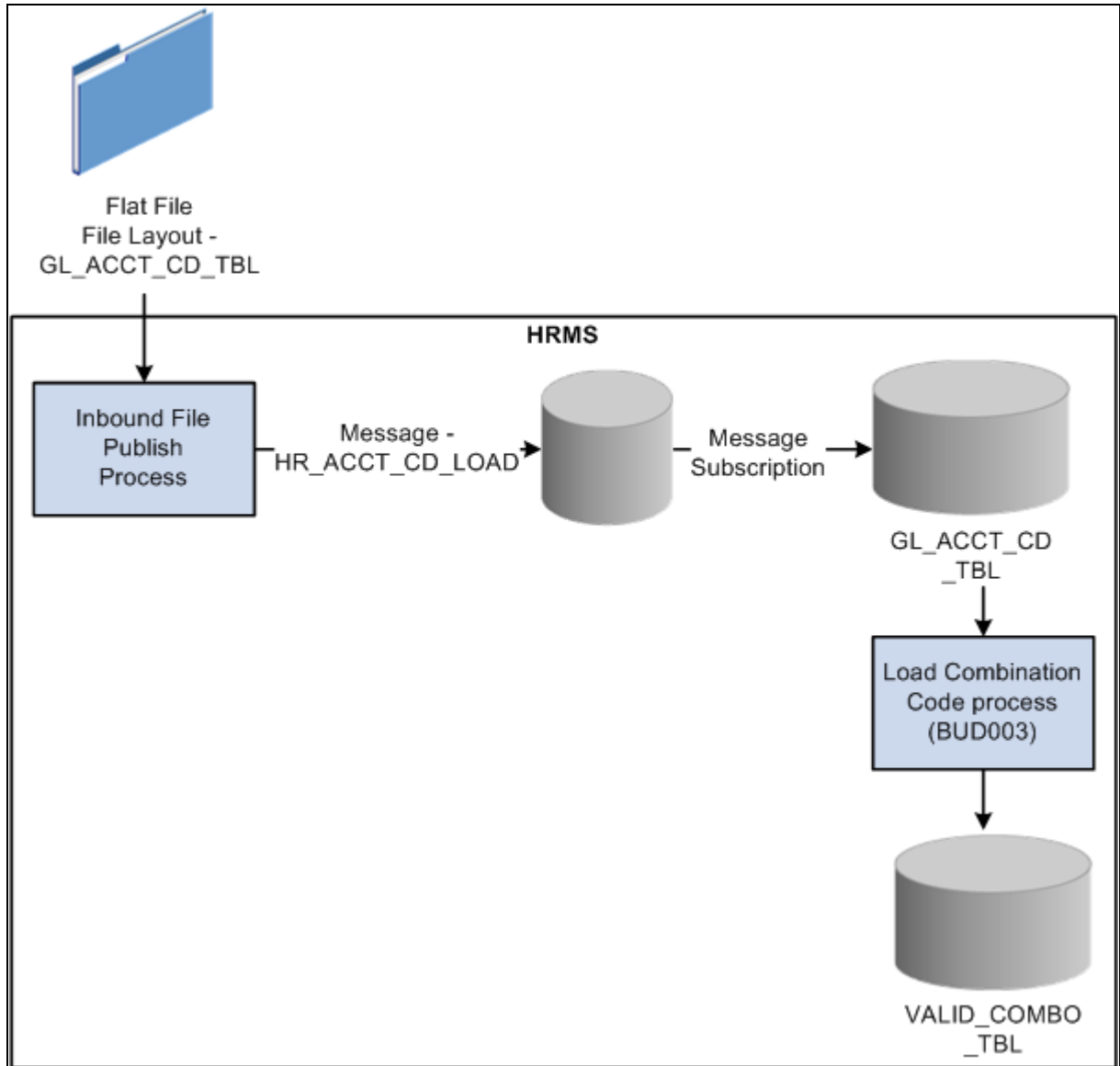
To populate valid combination codes using the Inbound Flat File process:

1. Create a flat file that contains valid combination data in the layout format specified by GL_ACCT_CD_TBL.
2. Initiate the Inbound Flat File process to publish this combination data using the HR_ACCT_CD_LOAD service operation.

When the service operation is received, the handler arranges the data in the correct layout and populates the GL_ACCT_CD_TBL

3. Run the Load Combination Code SQR process (BUD003) to populate the Valid Combination table.

This diagram illustrates importing valid combination codes using a flat file as discussed above:



Importing valid combination codes using a flat file

Manual Loading

If you do not integrate with PeopleSoft Enterprise Financials, you can enter valid ChartField combinations directly into the Combination Code Table page. This page is not available for manual data entry if the GL indicator is selected on the Installation table.

See Also

PeopleSoft Enterprise Human Resources PeopleBook: Integration Interfaces, "Using the Flat File Utility"

Understanding Speed Types

Speed types are shortcut keys for frequently used combinations of ChartFields. Using speed types can minimize keying, greatly increase journal efficiency, and reduce errors.

If you integrate with PeopleSoft Financials 8.0 or later, you can use the HR_CHARTFLD_COMBO_SYNC service operation to keep the Speed Type table up to date. Any change made to the Speed Type table in the Financials database triggers the Integration Broker update to HCM.

Pages Used to Enter and Review ChartField Combinations

Page Name	Definition Name	Navigation	Usage
Load Combination Code Table	RUNCTL_FILEPATH	Set Up HRMS, Common Definitions, ChartField Configuration, Load Combination Code Table, Load Combination Code Table	Run the Load Combination Code process (BUD003) to load the Combination Code table with ChartField combinations already imported into the GL_ACCT_CD_TBL using the HR_ACCT_CD_LOAD service operation.
Combination Code Table	VALID_COMBO_TBL	Set Up HRMS, Common Definitions, ChartField Configurations, Combination Code Table, Combination Code Table	Review all combination codes imported into HRMS and loaded by the Load Combination Code process (BUD003) Manually define and review valid combinations of ChartField values if not importing them.

Page Name	Definition Name	Navigation	Usage
Funding Source Information	HP_FUNDSRC_INF_SBP	- Click the Funding Source Information link on the Combination Code Table page. - Click the Funding Source Information link on the ChartField Transaction Table page.	View the default funding end date for a funding source. The Manage Commitment Accounting business process in PeopleSoft Enterprise Human Resources uses this information. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Commitment Accounting</i>, "Defining Fiscal Year Budgets," Funding End Dates and Multiyear Encumbrances.
Combination Code Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, ChartField Configurations, Combination Code Report	Run the Combination Code report (PAY760) to report on the contents of the Valid Combination table (VALID_COMBO_TBL).
SpeedTypes	HMCF_SPEEDTYPE	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Speedtypes, SpeedTypes	Review the Speed Type table maintained from PeopleSoft Financials.

Running the Load Combination Code Process

Access the Load Combination Code Table page (Set Up HRMS, Common Definitions, ChartField Configuration, Load Combination Code Table, Load Combination Code Table).

Load Combination Code Table

Run Control ID: PS [Report Manager](#) [Process Monitor](#)

Account Code Load Parameters

As Of Date: 

☐ Inactivate Accounts Not Downloaded

Load Combination Code Table page

As of Date

Enter the as of date for the ChartField combinations you are importing from PeopleSoft General Ledger.

Inactivate Accounts Not Downloaded?	When this option is selected, the system inactivates combinations for which it doesn't find matches in the current fiscal year. When this option is blank, old combinations remain active for the current fiscal year.

Defining Combination Codes

Access the Combination Code Table page (Set Up HRMS, Common Definitions, ChartField Configurations, Combination Code Table, Combination Code Table).

Combination Code Table

Set ID:SHARE

GL Combination Code:P00000001

Combination Code Detail

Find | View All | First1 of 1Last

*Effective Date:01/01/1990

*Status:Active

*Description:Salaries

Short Desc:Salaries

☒ Valid Value

ChartField Detail	
Account :	610000
Department :	10500
Project/Grant :	
Product :	
Fund Code :	
Program Code :	
Class Field :	
Affiliate :	
Operating Unit :	
Alternate Account :	
Budget Reference :	P001-REF
Chartfield 1 :	P001SA-CF1
Chartfield 2 :	P00110-CF2
Chartfield 3 :	P0006101-3

[Funding Source Information](#)

Combination Code Table page

Note. You cannot change the ChartField values for combination codes imported from Financials, but you can change the description and make it active or inactive.

GL Combination Code
(general ledger combination code)

Enter this code on the HRMS pages to use this combination of ChartFields in a transaction.

The system generates the combination code sequentially based on the Installation table's Last Combination Code Assigned field under these conditions:

- The ChartField combination is received from Financials by Integration Broker.
- The GL Combination Code value is not supplied on the inbound flat file.
- You manually add the ChartField combination and do not pre-assign the GL Combination Code value.

Valid Value

This field is available for entry when entering the ChartField combination for the first time for the setID. Select it if the ChartField combination is valid. If the combination already exists with the same setID, this field is populated based on the value of the preexisting combination and is unavailable for change.

Funding Source Information

Click this link to view the Funding Source Information page, which displays the default funding end date. The Manage Commitment Accounting business process uses the default funding end date in department budgets and in encumbrance definitions.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Commitment Accounting*, "Defining Fiscal Year Budgets," Funding End Dates and Multiyear Encumbrances.

ChartField Detail

If you're setting up combination codes manually, enter the ChartField value for each ChartField that applies to this ChartField combination.

Note. Only the ChartFields that are active on the Standard ChartField Configuration page are visible on this page.

Reviewing and Maintaining ChartField Transactions

To review and maintain ChartField transactions, use the ChartField Transaction Table (ACCT_CD_TABLE) component.

This section provides an overview of the ChartField Transaction search page, the ChartField Transaction Table, and discusses how to review and maintain ChartField transactions.

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Understanding the ChartField Transaction Search Page

When you access the ChartField Transaction Table search page, the system presents you with a Search Additional Chartfields field. Use this field to narrow the search of the type of ChartField you wish to access. Options include *Original ChartFields*, *Additional ChartFields*, and *Project Costing ChartFields*. The search page defaults to searching for the original ChartFields, unless otherwise specified in this field.

Understanding the ChartField Transaction Table

The system creates a record whenever you use a new combination of ChartField values in an HRMS transaction, whether you select a valid combination code or select a combination of individual ChartField values on the transaction page. It stores that combination in the ChartField Transaction table to maintain a history of ChartField combinations used in transactions.

You can use the Transaction Report (PAY710) to report on the contents of the ChartField Transaction table.

Note. If you are not using valid combination codes and want to be able to enter any combination of ChartFields on the transaction pages, do not populate the Valid Combination table. The system populates the ChartField Transaction table (ACCT_CD_TABLE) with the ChartField combinations you use so you can track them and reuse them.

Pages Used to Review and Maintain ChartField Transactions

Page Name	Definition Name	Navigation	Usage
ChartField Transaction Table	ACCT_CD_TABLE	- Set Up HRMS, Common Definitions, ChartField Configurations, ChartField Transaction Table, ChartField Transaction Table - Set Up HRMS, Product Related, Commitment Accounting, Budget Information, ChartField Transaction Table, ChartField Transaction Table	The system populates the ChartField Transaction Table with ChartField combinations once they've been used in processing. Maintain additional information about combination codes on this page.
ChartField Transaction Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, ChartField Configurations, ChartField Transaction Report	Run the Transaction Report (PAY710) to report on the contents of the ChartField Transaction table.

Reviewing and Maintaining ChartField Transactions

Access the ChartField Transaction Table page (Set Up HRMS, Common Definitions, ChartField Configurations, ChartField Transaction Table, ChartField Transaction Table).

ChartField Transaction Table	
Combination Code:	000000001
Combination Code Detail	
*Description:	Salaries
Short Desc:	Salaries
☐ Direct Charge ☒ Prorate Liability Indicator	
ChartField Detail	
Account :	5000
Department :	114
Project/Grant :	FACTORY
Product :	
Fund Code :	100
Program Code :	1000
Class Field :	10
Affiliate :	
Operating Unit :	
Alternate Account :	
Budget Reference :	0001-REF
Chartfield 1 :	0001SA-CF1
Chartfield 2 :	000111-CF2
Chartfield 3 :	00005001-3
Encumbrance Account:	
Pre-Encumbrance Account:	
Funding Source Information	

ChartField Transaction Table page

The ChartField information on this page is unavailable for entry, but you can maintain information about the combination. Only the ChartFields that are active on the Standard ChartField Configuration page are visible on this page.

Combination Code If this is not a valid combination code imported into or created in the Valid Combination table, the system assigns this unique combination of ChartFields a combination code. You can use the combination code on the transaction pages to reuse this particular combination of ChartFields.

Combination Code Detail

Direct Charge Select this check box to indicate whether you'll use this combination code during the Actuals Distribution process. This field is for information only; it has no affect on processing.

Prorate Liability Indicator If you want to prorate liabilities, select this check box.
The system looks for the Prorate Liability Indicator flag when it runs the Actuals GL Interface process. If you select this indicator, employee paid taxes and deductions are prorated back across the earnings expenses.

Encumbrance Account and Pre-Encumbrance Account These fields are available for use in your own GL interface programs. The Manage Commitment Accounting business process in PeopleSoft Enterprise Human Resources does not use these fields.

Funding Source Information Click this link to view the Funding Source Information page, which displays the default funding end date for this combination code.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Commitment Accounting*, "Defining Fiscal Year Budgets," Funding End Dates and Multiyear Encumbrances.

Editing ChartField Combinations in HRMS Transactions

This section provides an overview of ChartField validation and discusses how to:

- Edit or review ChartField details.
- Search by combination code.
- Search by speed type.

Understanding ChartField Validation

Any HCM transaction page on which you enter a ChartField combination code accesses a common ChartField Details page (HMCN_HRZNTL_CFLD) where you enter or view the ChartField details associated with the combination code. If you enter a new ChartField combination, the system performs a combination code validation process to ensure that the entered combination is valid.

The system uses one of these validation methods:

- If you integrate with PeopleSoft Financials 8.4.01 or higher, the system uses the COMBO_CF_EDIT_REQUEST and COMBO_CF_EDIT_REPLY service operations to validate the combination with the Financials database.
- If you do not integrate with PeopleSoft Financials 8.4.01 or higher and you populated the Valid Combination table (VALID_COMBO_TBL) with valid combinations, the system searches the Valid Combination table to find the ChartField combination that matches the individual ChartField values specified.
- If you do not integrate with PeopleSoft Financials 8.4 or higher and you did not populate the Valid Combination table, the system assumes the combination of ChartFields that you selected is valid and searches the Transaction table to find the match.

If it finds a match, it uses the corresponding combination code. If it does not find a match, it generates a combination code using the next available number.

Note. The effective date of the newly created combination code is the current date. If the effective date of the transaction is earlier than this date, you need to modify the effective date of the newly created combination code so that it will be a valid code for the transaction from which you created it.

Pages Used to Edit ChartField Combinations in HRMS Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
ChartField Details	HMCF_HRZNTL_CFLD	Click the ChartField Details or Edit ChartFields link or button on an HRMS transaction page.	Enter or review ChartFields or combination codes in PeopleSoft HRMS transactions.
Search Combination Codes	HMCF_VLD_CMBO_SRCH	Select the Combination Codes search option and click the Search button on the ChartField Details page.	Search for ChartFields using valid combination codes.
Search Speed Types	HMCF_SPD_TYP_SRCH	Select the Speed Types search option and click the Search button on the ChartField Details page.	Search for ChartFields using PeopleSoft Financials Speed Types.
Search Combo Codes	HMCF_CMBO_CD_SRCH	Select the ChartField Transactions search option and click the Search button on the ChartField Details page.	Select ChartFields individually or search for valid chartfield combinations already used in transactions.

Editing or Reviewing ChartField Details

Access the ChartField Details page (click the ChartField Details or Edit ChartFields link or button on an HRMS transaction pages).

ChartField Details

Combination Code:

Search Options

☒ Combination Codes

☐ Speed Types

ChartField Detail						
Account	Department	Project/Grant	Product	Fund Code	Program Code	Class Field

ChartField Details page (1 of 2)

Affiliate	Operating Unit	Alternate Account	Budget Reference	Chartfield 1	Chartfield 2	Chartfield 3

ChartField Details page (2 of 2)

Note. This page might have a more specific name, depending upon the transaction page from which you access it.

If the combination code is already entered on the transaction page, this detail page displays the associated ChartField values. If you are in correction mode or in a new effective dated row on the transaction page, then you can make changes to individual ChartField values and let the system determine if the new combination is valid. Otherwise the page is display only and you can only review the ChartField values.

If there is no combination code entered on the transaction page, all ChartField values are blank on the detail page and you can enter the specific ChartFields required.

Note. Only the ChartFields that are active on the Standard ChartField Configuration page are visible on this page.

Search Options

Select from the available options to search for an existing ChartField combination. The options available include the following, depending upon the combination code tables that you have set up:

- *Combination Codes*

This option is available if you populated the Valid Combination table (VALID_COMBO_TBL).

- *Speed Types*

This option is available if you imported SpeedType values from PeopleSoft General Ledger.

Searching by Combination Code

Access the Search Combination Codes page (select the Combination Codes search option and click the Search button on the ChartField Details page).

Search Combination Codes

GL Combination Code:

Search by ChartFields

Account:

Affiliate:

Department:

Operating Unit:

Project/Grant:

Alternate Account:

Product:

Budget Reference:

Fund Code:

Chartfield 1:

Program Code:

Chartfield 2:

Class Field:

Chartfield 3:

Search

Clear

Cancel

Combination Code / ChartFields

	Select	GL Combo Code	Account	Department	Project/Grant	Product	Fund Code	Program Code
1	Select							

Search Combination Codes page

Note. Only the ChartFields that are active on the Standard ChartField Configuration page are visible as fields on this page.

To search for a combination code:

1. Enter individual ChartField values.

The system finds all ChartField combination codes that match those ChartField values.

2. Select the combination code that you want.

The system returns you to the ChartField Details page with all individual ChartField values populated.

Searching by Speed Type

Access the Search Speed Types page (select the Speed Types search option and click the Search button on the ChartField Details page).

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Search Speed Types

SpeedType Key:

Search by ChartFields

Account:

Affiliate:

Department:

Operating Unit:

Project/Grant:

Alternate Account:

Product:

Budget Reference:

Fund Code:

Chartfield 1:

Program Code:

Chartfield 2:

Class Field:

Chartfield 3:

Search

Clear

Cancel

ChartField Detail

	Select	SpeedType	Account	Department	Project/Grant	Product	Fund Code	Program Code	Class Field
1	Select								

Search Speed Types page

Note. Only the ChartFields that are active on the Standard ChartField Configuration page are visible as fields on this page.

To search for a combination code using Speed Type:

1. Enter individual ChartField values.
The system finds all speed types that match those ChartField values.

2. Select the speed type that you want.
The system returns you to the ChartField Details page with all individual ChartField values populated.

3. Since this is selected from speed types, you might have to enter additional ChartField values to form a valid ChartField combination.

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Chapter 17

Setting Up Local Country Functionality

This chapter provides an overview of local country functionality set up and discusses how to:

- (CHE) Maintain Swiss postal codes.
- (DEU) Set up German industrial inspection codes.
- (ITA) Set up Italian city tables.
- (JPN) Set up Japanese control tables.
- (NLD) Load Dutch postal codes.
- (ESP) Set up Spanish control tables.
- (GBR) Set up national insurance prefixes for the U.K.

Understanding Local Country Functionality Setup

If you're administering a local or multinational workforce, you must set up certain tables that are referenced in the core control tables to support local country requirements. Do this before you set up core control tables, such as for pay groups, or define companies, locations, departments, and job codes.

(CHE) Maintaining Swiss Postal Codes

To maintain Swiss postal codes, use the Load Postal Codes CHE component (POSTAL_LOAD_CHE).

This section provides an overview of Swiss postal code maintenance and discusses how to update Swiss valid addresses.

Understanding Swiss Postal Code Maintenance

To update postal codes:

1. Download the latest update of postal codes from the website of the Swiss Post and note the path to the file in which you save it.
2. Download the latest update of alternate names from the website of the Swiss Post and note the path to the file in which you save it.

3. Use the Load Postal Codes CHE page to enter the file paths and load the valid addresses and alternate names files to the Valid Addresses table.

The system uses the information on the Valid Addresses table to validate municipalities against the postal code.

Page Used to Maintain Swiss Valid Addresses

Page Name	Definition Name	Navigation	Usage
Load Postal Codes CHE	POSTAL_LOAD_CHE	Set Up HRMS, Install, Product and Country Specific, Load Postal Codes CHE, Load Postal Codes CHE	Load Swiss postal code information into the Valid Addresses table.

Updating Swiss Valid Addresses

Access the Load Postal Codes CHE page (Set Up HRMS, Install, Product and Country Specific, Load Postal Codes CHE, Load Postal Codes CHE).

Load Postal Codes CHE

Postal Codes File:

Alternate Names File:

Postal Codes CHE			
	State	Postal Code	City
1	VD	1000	Chailly-sur-Lausanne
2	VD	1000	Lausanne
3	VD	1000	Lausanne 1 CC Distribution
4	VD	1000	Lausanne 12
5	VD	1000	Lausanne 13
6	VD	1000	Lausanne 14

Load Postal Codes CHE page

Postal Codes File

Enter the complete path to the Postal Code file that you downloaded from the Swiss Post.

Alternate Names file	Enter the complete path to the Alternate Names file that you downloaded from the Swiss Post.
Load Data	Click to load the postal code data into the Valid Addresses table.
State, Postal Code, and City	Initially, these fields display the current data from the Valid Addresses table. After you run the load process, the updated information appears.

(DEU) Setting Up the German Control Table

To set up German industrial inspection codes, use the Industrial Inspection component (IDUST_INSPEC_GER).

This section discusses how to set up German industrial inspections codes.

Page Used to Set Up German Industrial Inspection Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Industrial Inspection	INDUST_INSP_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection, Industrial Inspection	Set up German industrial inspection codes that you associate with locations in your organization.

Setting Up German Industrial Inspection Codes

Access the Industrial Inspection page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection, Industrial Inspection).

Industrial inspection codes aren't effective-dated and have no status.

City	Specify the city that is associated with this industrial inspection code according to the German <i>Berufsgenossenschaft</i> .

(ITA) Setting Up Italian City Codes

To set up Italian city codes, use the Load Cities ITA component (RUNCTL_CITYUPDATE).

This section lists the page used to load Italian city data.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Setting Up Country-Specific Tables"

Page Used to Load Italian City Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Load Cities ITA	RUNCTL_CITYUPDATE	Set Up HRMS, Install, Product and Country Specific, Load Cities ITA, Load Cities ITA	After downloading the city code data file from the Ministero delle Finanze, run the ITA City Update process to update Italian city data.

(JPN) Setting Up Japanese Control Tables

To set up Japanese control tables, use the Postal Code Table JPN component (POSTAL_CODE_TBL), the Education Level component (EDLVLAG_TBL_JPN), and the Calculation Rules Settings component (SETUP_SALCOMP_JPN).

This section provides an overview of education level age and discusses how to:

- Set up the Education Level Age table.
- Establish Japanese salary component settings.
- Set up the Postal Code table.
- Maintain the Postal Code table.

Understanding Education Level Ages

The Education Level Age Table enables you to link highest education levels—already in the system—to what we call the Education Level Age Basis (as of hire). The system uses the Education Level Age Basis in the calculation of a worker's Education Level - Adjusted Birth Date, which is in turn used in the calculation of a worker's Education Level Age at any point in time. The system uses a worker's Education Level Age in education level age-related pay calculations. Education level age-related pay is a form of seniority pay.

Calculating a Worker's Education Level Age

This section discusses how the system uses the Education Level Age Basis in the eventual determination of a worker's education age-related pay. This section uses many acronyms, so here's a quick reference:

Acronym	Meaning
ELABa	Education Level Age Basis (as of Hire)
AELABa	Adjusted Education Level Age Basis (as of Hire)
ELABi	Education Level - Adjusted Birth Date
SCB	Standard Calculation Birthday
CSD	Company Seniority Date
ELA	Education Level Age

Company A has set the Education Level Age Basis (ELABa) for four years of college at 22. The company also set the Standard Calculation Birthday (SCB)—the anniversary for incrementing years of service—to April 1.

Hiroshi was born on February 6, 1972 and graduated after four years of college on March 23, 1994 at age 22. He then spent two years travelling around the world. Company A hired him on June 1, 1996. He is not hired on April 1 because he didn't get back from his travels until May 1996. At the time he is hired, he is 24 years old.

For the purpose of calculating Hiroshi's education age-related pay, each year the system needs to calculate Hiroshi's Education Level Age. It will use his Education Level - Adjusted Birth Date to do this.

In calculating a worker's ELABi, the system uses the ELABa, the Company Seniority Date (CSD), and the company's SCB.

The relationship between the worker's CSD and the company's SCB may result in an adjustment to the worker's ELABa, called the Adjusted Education Level Age Basis or AELABa. If the month/day of a worker's hire date (as determined by the CSD field) is after the company's SCB (that is, CSD is greater than SCB), the worker's ELABa is decreased by 1.

In Hiroshi's case, because his June 1 month/day hire date (also his CSD) falls after the company's April 1 SCB, his ELABa is decreased by 1. If he had been hired on or before April 1, there would be no adjustment to his ELABa.

This is how to get Hiroshi's AELABa:

- Since CSD month/day (Jun 1) > SCB month/day (Apr 1), adjustment = -1
- Using this -1 you get:

$$\text{ELABa} - 1 = \text{AELABa}$$

Which in Hiroshi's case is:

$$22 - 1 = 21$$

The system now uses the AELABa (21) to determine Hiroshi's ELABi year.

This formula is:

Year of Hire – AELABa = ELABi (year)

or

1996 – 21 = 1975

So for education age-related pay calculations, Hiroshi's ELABi is April 1, 1975, the combination of the company's SCB month/day and Hiroshi's ELABi year (remember, he was born February 6, 1972).

Now we can look at how important that ELABi is.

One year later, 1997, the system needs to know Hiroshi's ELA. This is the calculation:

SCB (including Year of Calculation) – ELABi = ELA

or

April 1, 1997 – April 1, 1975 = 22

This is the same ELA as a graduate who started with the company immediately after college. This set of calculations has, then, effectively adjusted Hiroshi's ELA, upon which education age-related pay is based, to take into account the two years that he spent traveling and the fact that he started work after the company's SCB.

Note. If your company considers that the lapse of two months from April to June is not significant, you can adjust Hiroshi's ELABi from April 1, 1975 to April 1, 1974. Then, for the same 1997 calculation, Hiroshi's ELA is 23 (April 1, 1997 to April 1, 1974), the same as a new graduate who has worked for one year.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Administering Seniority Pay"

Pages Used to Set Up Japanese Control Tables

Page Name	Definition Name	Navigation	Usage
Education Level	EDLVLAG_TBL_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Education Level, Education Level	Set up your company's education level age bases.

Page Name	Definition Name	Navigation	Usage
Calculation Rule Settings	SETUP_SALCOMP_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Calculation Rule Settings, Calculation Rule Settings	Establish your organization's standard calculation birthday and specify whether you want to use a grade range check for certain salary components.
Load Postal Codes JPN	RUNCTL_POSTAL_JPN	Set Up HRMS, Install, Product and Country Specific, Load Postal Codes JPN, Load Postal Codes JPN	Import Postal Code CSV files provided by Japan Post.
Postal Codes JPN	POSTAL_TBL_JPN	Set Up HRMS, Install, Product and Country Specific, Postal Codes JPN, Postal Codes JPN	Enter information to maintain Japanese postal codes or add data that did not import as expected.

Setting Up the Education Level Age Table

Access the Education Level page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Education Level, Education Level).

Education Level

Education Level Age					
Customize Find View All First 1-4 of 4 Last					
	Highest Education Level	Description	Education Level Age Basis		
1	C	C-HS Graduate or Equivalent	18	+	-
2	F	F-2-Year College Degree	20	+	-
3	G	G-Bachelor's Level Degree	22	+	-
4	I	I-Master's Level Degree	24	+	-

Education Level page

The system uses these age bases in the calculation of a worker's Education Level-Adjusted Birth Date, which is, in turn, used in the calculation of the worker's Education Level Age and education level age-related pay.

Education Level Age Basis

This is the value you associate with the Highest Education Level that you selected in the first field. The system uses this in calculating a worker's Education Level-Adjusted Birth Date, which is used in the calculation of a worker's education level age.

Note. The Highest Education Level values are translate values from the Highest Education Level table. You access the table to put workers' highest education levels on their Personal History page in Personal Information. If you change any of these translate values (inactivate them, for example), you will need to change any worker records that were using the value to use another value. If you add a translate value and you want to associate an education level age basis with it, you must also add it to this page and allocate an Education Level Age Basis to keep it synchronized with the Highest Education Level table. If you don't add it, and you use the new Highest Education Level value—in Personal Data, Personal Profile, for example—the system will not be able to calculate the worker's Education Level - Adjusted Birth Date (it will remain blank). Consequently, the system will not be able to calculate the worker's Education Level Age.

Establishing Japanese Salary Component Settings

Access the Calculation Rule Settings page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Calculation Rule Settings, Calculation Rule Settings).

Calculation Rule Settings

Standard Calculation Birthday

Educ Lvl Month: 4 Educ Level Day: 1

Defined Range Check

☒ Defined Range Check

Calculation Rule Settings page

Standard Calculation Birthday

This is the single date, or anniversary, on which your workers' education level ages increment by one.

- Educ Lvl Month**
(education level month)

Enter the month, where January = 1, February = 2 and so on. This sets the month of your organization's Standard Calculation Birthday, the date on which all workers' company years of seniority increment by one year. It is used in the calculation of each worker's Education Level Age.

Educ Level Day
(education level day)

This is the day of the month of the Standard Calculation Birthday. For example, Month 4, Day 1 sets the Standard Calculation Birthday as April 1.

Defined Range Check

Select to ensure the system checks that any record added to a Job Data - Compensation page with a compensation rate code of class *Defined Rate of Pay* (DFRPAY) is within the range that you have defined for that grade on the Salary Grade Table.

The check applies to both a manually added record and an automatically added record.

Selecting this check box also ensures that only one compensation rate code of the class DFRPAY can be entered on a worker's Compensation page.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Compensation Information

Setting Up the Postal Code Table

Access the Load Postal Codes JPN page (Set Up HRMS, Install, Product and Country Specific, Load Postal Codes JPN, Load Postal Codes JPN).

Load Postal Codes JPN page

Note. Before using this page, you must download and extract the CSV file from Japan Post's website and post it to a FTP server located at your site. The CSV file must be encoded in Shift-JIS character set. You must define URL data in the PeopleTools Utilities menu before using this Load Postal Code process.

See Chapter 6, "Setting Up and Installing PeopleSoft HRMS," Specifying the Address Format for a Country, page 153.

URL Identifier	Select the FTP Uniform Resource Locator (URL) where the CSV file that contains the postal codes is located.
All Prefectures	Select this option to load postal data for all prefectures. Note. Because there are more than 120,000 postal codes rows, consider batch performance when importing all rows.
Selected Prefecture	Select this option to load postal codes for a specific prefecture.

Load Results

If the length of Address1 or Address AC1 is more than 55 characters, the fields are left blank. Also, if the length of Address1 or Address AC1 is too long and divided into multiple rows, only the first row is imported and the rest of the rows are printed on the log reports as unimported rows.

If you want to remove "Not listed as below" as the Address 1 and AC Address 1, register these text strings in the Strings Table; the Program ID is HGJPPSTL. Set the text that you want to remove to *String Text* fields.

All rows might not appear when there are multiple rows for a single postal code with the same State, City, Address1, but different Address1_AC because of different pronunciation.

If expected data is not loaded, add it or edit it on the Postal Codes JPN page.

Postal Code Load Process Log Reports

After completion of this process, the system generates a process log report that lists the number of rows imported, the number of rows not imported, and a detailed reason for the latter. Possible reasons for not importing rows include:

- The import file was not found.
- The file is formatted incorrectly.
- The import file is for a different prefecture from the one specified in the Selected Prefecture field.

Maintaining the Postal Code Table

Access the Postal Codes JPN page (Set Up HRMS, Install, Product and Country Specific, Postal Codes JPN, Postal Codes JPN).

Postal Codes JPN

Postal Code:

105-0023

Municipal Code:

000004

Minato-ku

Prefecture:

13

Tokyo-To

City:

Minato-ku

Address 1:

Shibaura

AC City:

Minato-ku

AC Address 1:

Shibaura

Postal Codes JPN page

- Municipal Code

Enter the code for the Japanese municipality that this postal code belongs to.
- Prefecture

Select the prefecture for this postal code from the list.

(NLD) Loading Dutch Postal Codes

To load Dutch postal codes, use the Postal Codes NLD component (RUN_POSTAL_NLD).

This section discusses how to import postal codes into the Postal Code JPN .

Page Used to Load Postal Codes

Page Name	Definition Name	Navigation	Usage
Load Postal Codes NLD	RUNCTL_POSTAL_NLD	Set Up HRMS, Install, Product and Country Specific, Load Postal Codes NLD, Load Postal Codes NLD	Import postal codes into the NLD Postal Code JPN in your human resources system.

Importing Postal Codes Into the Postal Code Table

Access the Load Postal Codes NLD page (Set Up HRMS, Install, Product and Country Specific, Load Postal Codes NLD, Load Postal Codes NLD).

Load Postal Codes NLD

Run Control ID: GN2002M01-101

[Report Manager](#) [Process Monitor](#) [Run](#)

Report Request Parameters

Initial Postal Code Load file:

Update Postal Code File:

Load Postal Codes NLD page

The Dutch postal authority provides a postal code table to which you can subscribe. The Load Postal Code Table process loads all of the postal codes provided in a source file by the Dutch Post (TPG Post) into your human resources system.

Report Request Parameters

- Initial Postal Code Load file** Enter the initial postal code load file, including the path information, if you're adding Dutch postal code data to your system for the first time.
- Update Postal Code File** Enter the updated postal code file, including the path information, if you're doing a periodic update of the Dutch Postal Code Table.
- Run** Click to run this request. PeopleSoft Process Scheduler runs the NLD Load Postal Code Table process at user-defined intervals.

(ESP) Setting Up Spanish Control Tables

To set up Spanish control tables, use the Insurance Company Table component (INSUR_COMPANY_ESP) and the Industry Activity Table component (INDUSTRY_ACT_ESP).

If you do business in Spain, enter the information that is required by the Spanish government concerning your organization's primary industry activity and the insurance company that you use for workplace accidents or illnesses.

The Spanish government also requires every Spanish worker to belong to a Social Security Work Center. Employers use the work center number information to report worker information to the Spanish Social Security National Institute (*Instituto Nacional de la Seguridad Social*).

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs

Pages Used to Set Up Spanish Control Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Insurance Company Table	INSUR_COMP_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company Table	Enter information about your organization's insurance company.
Industry Activity Table	INDSTRY_ACT_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity Table	Define the codes that are needed by your organization.

(GBR) Setting Up National Insurance Prefixes for the U.K.

To set up national insurance prefixes for the UK, use the NID Prefix GBR (NID_PREFIX_GBR) component.

This section provides an overview of national insurance prefixes and discusses how to:

- Review national insurance prefixes.
- Update national insurance prefixes.

Understanding National Insurance Prefixes

Starting in the tax year 2004/2005, the Inland Revenue requires that employers' year-end reporting contains valid national insurance prefixes only. Submissions with invalid national insurance prefixes will be rejected.

Use the delivered setup table to define valid national insurance prefixes. When you enter a person's national insurance code on the Biographical Details page, the system validates the prefix against this national insurance prefix table.

The format of national insurance numbers is defined on the National ID Type Table page, which is described in this PeopleBook.

See Also

[Chapter 12, "Setting Up Personal Information Foundation Tables," Defining National ID Types, page 320](#)

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources," Entering Name and Biographical Data

Pages Used to Set Up National Insurance Prefixes

Page Name	Definition Name	Navigation	Usage
NID Prefix GBR	NID_PREFIX_GBR	Set Up HRMS, Install, Product and Country Specific, NID Prefix GBR, NID Prefix GBR	View the existing NID prefixes.
NID Prefix Details	NID_PR_GBR_SEC	Click a NI prefix link or click the Add button on the NID Prefix GBR page.	Set up a new NID prefix or change the status of an existing prefix.

Reviewing National Insurance Prefixes

Access the NID Prefix GBR page (Set Up HRMS, Install, Product and Country Specific, NID Prefix GBR, NID Prefix GBR).

NID Prefix GBR

Effective: 08/03/2009
Status: Active
Refresh Add

[AA](#) [AB](#) [AE](#) [AH](#) [AK](#) [AL](#) [AM](#) [AP](#) [AR](#) [AS](#) [AT](#) [AW](#) [AX](#) [AY](#) [AZ](#)
[BA](#) [BB](#) [BE](#) [BH](#) [BK](#) [BL](#) [BM](#) [BT](#)
[CA](#) [CB](#) [CE](#) [CH](#) [CK](#) [CL](#) [CR](#)
[EA](#) [EB](#) [EE](#) [EH](#) [EK](#) [EL](#) [EM](#) [EP](#) [ER](#) [ES](#) [ET](#) [EW](#) [EX](#) [EY](#) [EZ](#)
[GY](#)
[HA](#) [HB](#) [HE](#) [HH](#) [HK](#) [HL](#) [HM](#) [HP](#) [HR](#) [HS](#) [HT](#) [HW](#) [HX](#) [HY](#) [HZ](#)
[JA](#) [JB](#) [JC](#) [JE](#) [JG](#) [JH](#) [JJ](#) [JK](#) [JL](#) [JM](#) [JN](#) [JP](#) [JR](#) [JS](#) [JT](#) [JW](#) [JX](#) [JY](#) [JZ](#)
[KA](#) [KB](#) [KE](#) [KH](#) [KK](#) [KL](#) [KM](#) [KP](#) [KR](#) [KS](#) [KT](#) [KW](#) [KX](#) [KY](#) [KZ](#)
[LA](#) [LB](#) [LE](#) [LH](#) [LK](#) [LL](#) [LM](#) [LP](#) [LR](#) [LS](#) [LT](#) [LW](#) [LX](#) [LY](#) [LZ](#)
[MA](#) [MW](#) [MX](#)
[NA](#) [NB](#) [NE](#) [NH](#) [NL](#) [NM](#) [NP](#) [NR](#) [NS](#) [NW](#) [NX](#) [NY](#) [NZ](#)
[OA](#) [OB](#) [OE](#) [OH](#) [OK](#) [OL](#) [OM](#) [OP](#) [OR](#) [OS](#) [OX](#)
[PA](#) [PB](#) [PC](#) [PE](#) [PG](#) [PH](#) [PJ](#) [PK](#) [PL](#) [PM](#) [PN](#) [PP](#) [PR](#) [PS](#) [PT](#) [PW](#) [PX](#) [PY](#)
[RA](#) [RB](#) [RE](#) [RH](#) [RK](#) [RM](#) [RP](#) [RR](#) [RS](#) [RT](#) [RW](#) [RX](#) [RY](#) [RZ](#)
[SA](#) [SB](#) [SC](#) [SE](#) [SG](#) [SH](#) [SJ](#) [SK](#) [SL](#) [SM](#) [SN](#) [SP](#) [SR](#) [SS](#) [ST](#) [SW](#) [SX](#) [SY](#) [SZ](#)
[TA](#) [TB](#) [TE](#) [TH](#) [TK](#) [TL](#) [TM](#) [TP](#) [TR](#) [TS](#) [TT](#) [TW](#) [TX](#) [TY](#) [TZ](#)
[WA](#) [WB](#) [WE](#) [WK](#) [WL](#) [WM](#) [WP](#)
[YA](#) [YB](#) [YE](#) [YH](#) [YK](#) [YL](#) [YM](#) [YP](#) [YR](#) [YS](#) [YT](#) [YW](#) [YX](#) [YY](#) [YZ](#)
[ZA](#) [ZB](#) [ZE](#) [ZH](#) [ZK](#) [ZL](#) [ZM](#) [ZP](#) [ZR](#) [ZS](#) [ZT](#) [ZW](#) [ZX](#) [ZY](#)

NID Prefix GBR page

By default, this page lists the NID prefixes that are active as of the current date. Click the NID prefix link to view and update the effective date and status of the selected NID prefix.

- Effective and Status

To display NID prefixes that are active as of a different date or to display NID prefixes with a different status, update the Effective field and/or the Status field and click the Refresh button
- Refresh

Click to refresh the page. Use this button when you change the Effective or Status fields.
- Add

Click to add a new NI prefix. The NID Prefix Details page appears.

Updating National Insurance Prefixes

Access the NID Prefix Details page (click a NI prefix link or click the Add button on the NID Prefix GBR page).

NID Prefix Details

Prefix: AA

National Insurance Number Prefix

Customize | 1 of 1

First 1 Last

Effective Date	Status		
06/04/2004	Active	+	-

NID Prefix Details page

Use this page to add a new NID prefix or change the status of an existing NID prefix. To change existing prefixes, add a new row.

Select the date that the prefix becomes *Active* or *Inactive* and select the status in the Status field.

Chapter 18

Setting Up and Working with Market Pay

This chapter gives an overview of the market pay and discusses how to:

- Set up geographical regions and the market pay matrix.
- Map and load data into the matrix.

Understanding Market Pay

This section discusses:

- Market pay functionality.
- The market pay process flow.

Market Pay Functionality

Market Pay functionality in PeopleSoft Enterprise Human Resources assists you in using salary survey data as a guide for awarding competitive compensation to your workers. Market pay is a range of compensation information, including the different elements of compensation such as base, variable, and total compensation which may vary by geography. With PeopleSoft Market Pay functionality, you can define market pay by geography.

When you use the market pay functionality, you can:

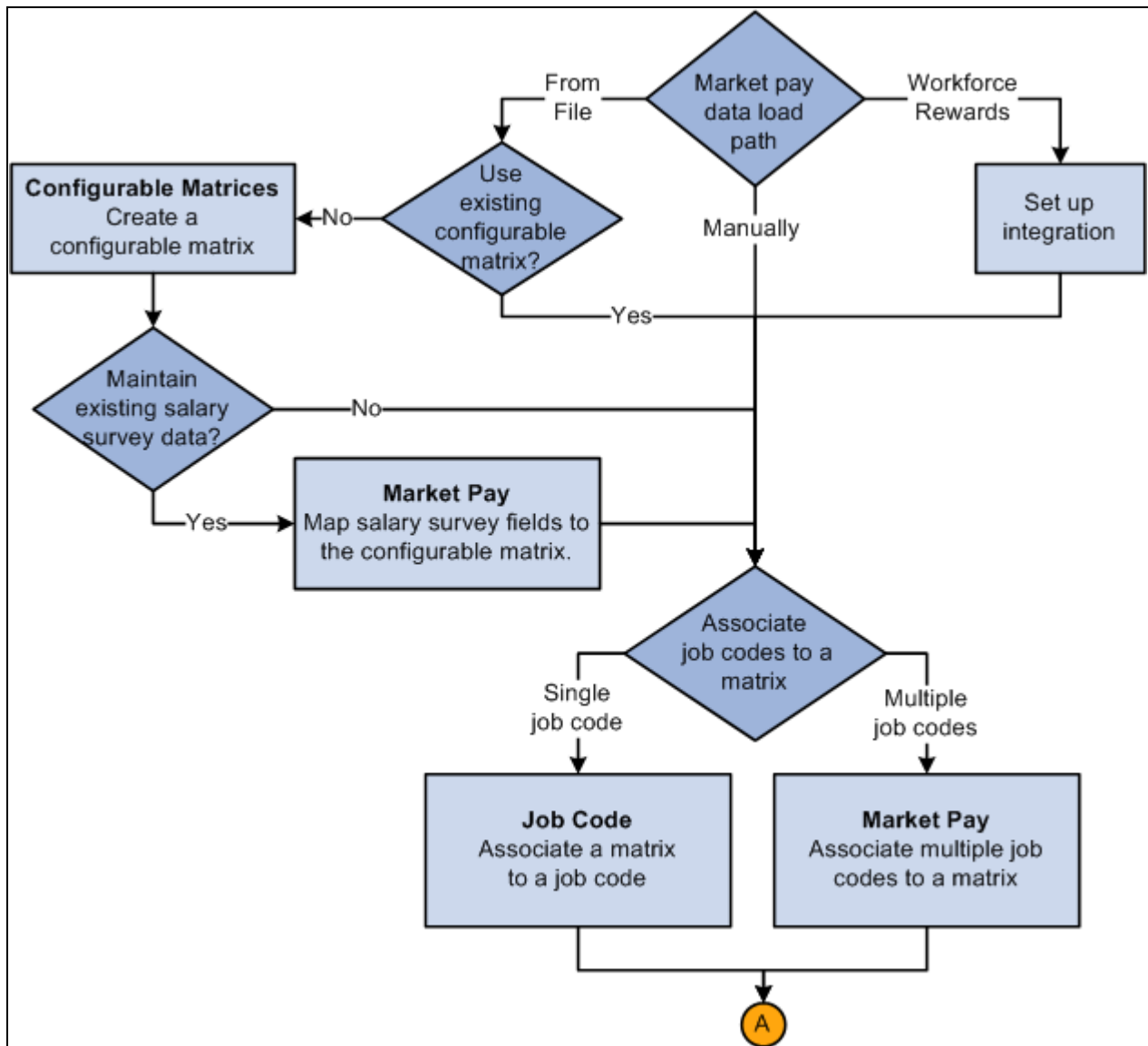
- Define geographic areas to relate finalized market data to workers.
You can further distinguish geography by country, state, province, and city.
- Create a market pay matrix and associate it with one or multiple job codes.
- Upload data from existing salary survey tables into the market pay tables, which preserves the existing functionality.
- Import salary survey data from PeopleSoft Enterprise Workforce Rewards if your organization licenses that application.
- Store conclusion market data in the form of a matrix.

The Market Pay Process Flow

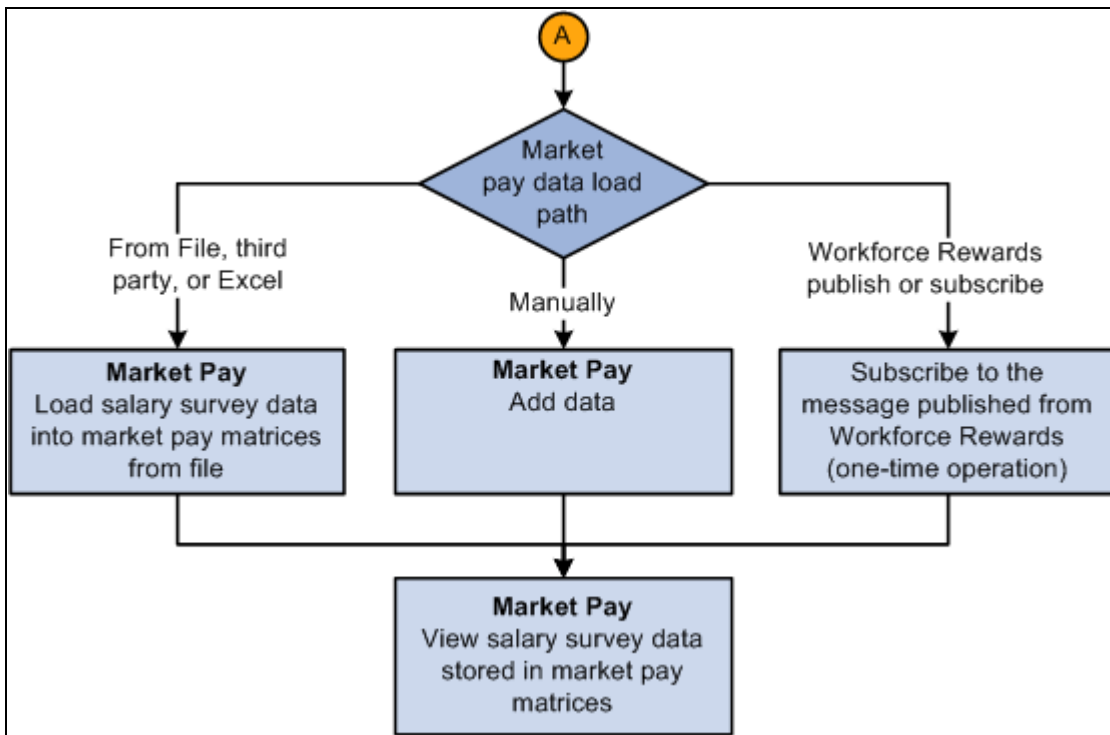
Follow these steps to set up the market pay functionality:

1. Define geographical areas.
2. Select an existing configurable market pay matrix, or create a new one.
3. (Optional) Map existing salary survey data fields to a configurable matrix definition.
4. Associate a market pay matrix with one job code on the Job Code - Market Pay Match page or to several job codes on the Associate Mkt Pay to Job Codes page.
5. Load market pay data by one of three methods:
 - Load data from file using an automated process.
 - Manually enter data.
 - (Workforce Rewards users only): Subscribe to message published from Workforce Rewards.
Set up Integration Broker messaging to subscribe to the message published by Workforce Rewards.
6. View market pay data online by job code.

These diagrams illustrate the market pay process flow as discussed above:



Creating a configurable matrix and associating job codes



Loading data into the market pay matrix

Prerequisites

These tasks are prerequisites to setting up and using market pay matrices:

1. Create job codes for jobs in your company.

See [Chapter 13, "Setting Up Jobs," page 331](#).

2. Assign job codes to workers during the hiring process.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce."

3. Conduct salary surveys and analyze salary data.

4. Set up the integration with Workforce Rewards if you plan to import salary data from that application using the COMP_MKT_RATE_SYNC Integration Broker message and service operation.

Setting Up Geographical Areas and Market Pay Matrices

To set up geographical areas and matrices, use the Define Geographical Areas (GEOGRAPHY_TBL) and Define Matrices (WCS_LK_TBL_DEFN) components.

This section provides an overview and discusses how to:

- Define geographical areas for market pay matrices.
- Set up a market pay matrix definition.
- Define inputs for market pay surveys.
- Define outputs for market pay surveys.
- Specify search keys.
- View or enter output data content.
- View matrix results.

Understanding Market Pay Matrices

PeopleSoft delivers these matrices:

- MARKET_PAY
- WFR_SURVEY_DATA

The system uses this matrix if you import salary data from the Workforce Rewards application.

You can set up additional configurable matrices to include market pay survey data.

Note. If you have maintained survey matches in PeopleSoft, you can continue to do so by selecting the delivered Market Pay matrix or by creating a new matrix with fields such as Survey Provider and Survey Job Code. These fields enable you to create ad hoc survey participation reports at any time. You create the reports based on the requirements of your survey providers.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Using Configurable Matrices"

Pages Used to Set Up Geographical Areas and Market Pay Matrices

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Geographical Areas	GEOGRAPHY_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Define Geographical Areas, Define Geographical Areas	Define geographical areas by city, state, province, and country. Use these areas to organize market pay data.
Matrix Definition	WCS_LK_TBL_DEFN	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition	Set up a market pay matrix definition.

Page Name	Definition Name	Navigation	Usage
Inputs	WCS_LK_TBL_INPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Inputs	Define inputs for market pay surveys.
Outputs	WCS_LK_TBL_OUTPUTS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Outputs	Define outputs for market pay surveys.
Search Keys	WCS_LK_TBL_KEYS	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys	Specify the search keys to be used to match worker data used in market pay surveys.
Load Configurable Matrix Keys	WCS_LK_TBL_KEY_SEC	Click the Select Values From Prompt Table link on the Search Keys page.	Automatically load search keys for specific sources using a prompt table.
Data Content	WCS_LK_TBL_DATA	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content	View or enter values for the output data.
View	WCS_LK_TBL_VIEW	Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View	View the matrix as of the <i>last saved version</i> .

Defining Geographical Areas for Market Pay Matrices

Access the Define Geographical Areas page (Set Up HRMS, Product Related, Compensation, Market Pay, Define Geographical Areas, Define Geographical Areas).

Define Geographical Areas

Set ID: SHARE Geography ID: SOUTHWEST REGION

Define Geographical Areas
Find | View All First 1 of 1 Last

*Effective Date: 01/01/2000 *Status: Active

*Description: Southwest Region US

Data
Customize | Find

	Country	Description	State / Province	Description	City		
1	USA	United States	AZ	Arizona		+	-
2	USA	United States	NM	New Mexico		+	-
3	USA	United States	OK	Oklahoma		+	-
4	USA	United States	TX	Texas		+	-

Define Geographical Areas page

You can enter a geography as broad as an individual country, or you may target a specific country, state, province, or city. You can have one or more rows of country, state, province, or city data. However, you cannot list the same combination of country, state, province, or city within the same geographical area.

Warning! Use care when listing the same combination of country, state, province, or city in different geographies, as this may result in conflicting information when combined with worker data.

Effective Date	You may change geographic definitions.
Status	Select <i>Active</i> or <i>Inactive</i> .
Description	Enter your company-defined name.
Country and State / Province	Select a value from the available listing.
City	Enter the name of the specific city. The spelling is not validated so you must enter the name with capitalization and punctuation.

Setting Up a Market Pay Matrix Definition

Access the Matrix Definition page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Matrix Definition).

Matrix Definition Inputs Outputs Search Keys Data Content View

Matrix Name: MARKET_PAY

Matrix Definition First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*Description: Market Pay

Short Description: Market Pay

*Matrix Type: MARKETPAY Market Pay Surveys

Matrix Environment

Matrix Usage (Results): MARKETPAY Market Pay Surveys

Matrix Orientations (Sources)

Orientation	Description
EMPLOYEE	Employee

Comment:

Last Updated: 08/03/09 10:09:04.000000AM **Last Updated By:** PS

Matrix Definition page

- Effective Date** Enter a date that is equal to or less than the date you want to link it to one or more job codes.
- Status** Select *Active*. The default value for all configurable matrices is *Inactive*. You must change the status to *Active* in order to use the matrix.
- Matrix Type** Select *MARKETPAY*.

Defining Inputs for Market Pay Surveys

Access the Inputs page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Inputs).

Matrix_DefinitionInputsOutputsSearch KeysData ContentView

Matrix Name:MARKET_PAY

Matrix Definition

First1 of 1Last

Effective Date:01/01/1900Status:Active

Description:Market Pay

Matrix Type:Market Pay Surveys

Matrix Inputs

First1-2 of 2Last

*Order:10

*Key Type:Match

Decimals:0

*Label:Survey Job Code

Type of Data:Char

*Display As:Row

Optional Prompting

Table:

Field:

Set ID:

Sources for Resolving Input

Customize1 of 1Last

*Source ID	Description	Orientation
SURVEY_JOB_CODE	Survey Job Code	

*Order:20

*Key Type:Match

Decimals:0

*Label:Survey Provider

Type of Data:Char

*Display As:Row

Optional Prompting

Sources for Resolving Input

Customize1 of 1Last

*Source ID	Description	Orientation
SURVEY_PROVIDER	Survey Provider	

Inputs page

Optional Prompting

If you specify GEOGAREA as the source ID, you can enter prompt values in this group box. Enter GEOGRAPHY_TBL as the table and GEOGRAPHY_ID as the field. There is no automatic validation of key values for geographical areas.

Sources for Resolving Input

Source ID Select the source for the market pay data. The maximum number of inputs for each matrix is 15. Common types of inputs include:

- Geographical Area
- Survey Provider
- Survey Job Code

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Predefined Source IDs and Result IDs for Configurable Matrices"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Using Configurable Matrices," Defining Sources Based on Geographical Areas

Defining Outputs for Market Pay Surveys

Access the Outputs page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Outputs).

The screenshot displays the 'Outputs' page for the 'MARKET_PAY' matrix. The page has a tabbed interface with 'Matrix Definition', 'Inputs', 'Outputs', 'Search Keys', 'Data Content', and 'View'. The 'Outputs' tab is active.

Matrix Name: MARKET_PAY

Matrix Definition (1 of 1)

Effective Date: 01/01/1900 **Status:** Active

Description: Market Pay

Matrix Type: Market Pay Surveys

Matrix Outputs (1-8 of 8)

*Order:	10	*Result ID:	PROVIDER_DESCRIPTION			
*Label:	Description	Type of Data:	Character			
Decimals:						
☐ Do not return Results						
Valid Values						

Outputs page

Result ID

Select an output for the market pay matrix. Typical outputs include currency, base, variable, and total compensation. You can have a maximum of 30 outputs for each matrix.

These system-delivered values have default names, however, you can edit them to the label that best suits your business.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Predefined Source IDs and Result IDs for Configurable Matrices."

Specifying Search Keys

Access the Search Keys page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Search Keys).

Matrix DefinitionInputsOutputsSearch KeysData ContentView

Matrix Name:MARKET_PAY

Matrix Definition

Effective Date:01/01/1900Status:Active

Description:Market Pay

Matrix Type:Market Pay Surveys

*Enter Keys for:Survey Provider

Select Values From Prompt Table

Search Key Series

CustomizeFindView All1 of 1FirstLast

*Search Key (Character)	*Order	WildCard		
CANADA	10		+	-

Generate Key Combinations

Search Keys page

Use this page to enter the key values against which worker data is matched. Suitable search keys for a market pay matrix are *Geographical Area* or *Survey Provider*.

Note. You can create a matrix without specifying any search keys and output data values. For example, you might want to define a template for a matrix and then load values from other sources such as a flat file. However, if you change the status of the matrix to Active and you have not defined any search criteria or values, you receive a warning.

Viewing or Entering Output Data Content

Access the Data Content page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, Data Content).

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Matrix DefinitionInputsOutputsSearch KeysData ContentView

Matrix Name:MARKET_PAY

Matrix Definition

Effective Date:01/01/1900Status:Active

Description:Market Pay

Matrix Type:Market Pay Surveys

Matrix Data

Survey Job Code	Survey Provider	Default	Description	Survey Salary	Currency	Mean Base Rate	Median Base Rat	Mean Total Comp	Med Total Comp	Midpoint Rate
LEFTWING	CANADA	☐	Hockey Player	1234567	CAD	1,234,567.000	1,234,567.000	1,234,567.000	1,234,567.000	1,234,567.000

Data Content page

Use this page to view input and output fields. You may leave the data values blank for the loading of market pay data from a file or Workforce Rewards. You may also enter the data manually.

Viewing Matrix Results

Access the View page (Set Up HRMS, Common Definitions, Configurable Matrices, Define Matrices, View).

Matrix DefinitionInputsOutputsSearch KeysData ContentView

Matrix Name:MARKET_PAY

Matrix Definition

Effective Date:01/01/1900Status:Active

Description:Market Pay

Matrix Type:Market Pay Surveys

Display Saved Matrix

(This will display only the last saved version of the matrix)

View page

After you have entered all data content for outputs, you must save the matrix. You can view the matrix on this page only *after* you have saved it.

When you click the Display Saved Matrix button, the results generated are from the *last saved* version of the matrix.

Important! This page displays only the *last saved* version of the matrix.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices."

Mapping Data and Loading the Matrix

To map market pay data and load the matrix, use the Define Salary Survey Mapping (SP_SURV_MAP_TBL), Associate Mkt Pay to Job Codes (SP_SAL_SURV_TBL), Load Market Pay Data from File (SP_SURVLOAD_TBL), and Report Market Pay by Job Code (SP_MPAY_RPT_TBL) components.

This section discusses how to:

- Map salary survey data.
- Associate market pay data to job codes.
- Associate market pay data to a single job code.
- Load market pay data from a file.
- Load market pay data from Workforce Rewards.
- Load market pay data manually.
- Report market pay data by job code.

Pages Used to Map Data and Load the Matrix

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Salary Survey Mapping	SP_SURV_MAP_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Define Salary Survey Mapping, Define Salary Survey Mapping	Map market pay matrix fields to existing salary survey fields.
Associate Mkt Pay to Job Codes	SP_SAL_SURV_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Associate Mkt Pay to Job Codes, Associate Mkt Pay to Job Codes	Associate market pay matrices to specific job codes.
Market Pay Match	JOBCD_MP_SAL_SURV	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match	Associate a market pay matrix to a specific job code using the Job Code table.

Page Name	Definition Name	Navigation	Usage
Load Market Pay Data from File	SP_SURVLOAD_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Load Market Pay Data from File, Load Market Pay Data from File	Load market pay data from files to overwrite existing data or add new data.
Report Market Pay by Job Code	SP_MPAY_RPT_TBL	Set Up HRMS, Product Related, Compensation, Market Pay, Report Market Pay Data by Job Code, Report Market Pay Data by Job Code	This effective-dated report displays all the market pay definitions ever associated with a particular job code.

Mapping Salary Survey Data

Access the Define Salary Survey Mapping page (Set Up HRMS, Product Related, Compensation, Market Pay, Define Salary Survey Mapping, Define Salary Survey Mapping).

Define Salary Survey Mapping

Set ID: SHARE Matrix Name: MARKET_PAY Market Pay

Matrix Definition Find | View All | First 1 of 2 Last

Effective Date: 06/11/2004 *Status: Active

*Description: MARKET_PAY

Field Mapping Customize | 1-10 of 10

	Matrix Field	Target Field
1	Currency	Currency
2	Description	Provider Description
3	Mean Base Rate	Mean Base Rate
4	Mean Total Comp	Mean Total Compensation
5	Med Total Comp	Median Total Compensation
6	Median Base Rat	Median Base Rate
7	Midpoint Rate	Midpoint Range
8	Survey Job Code	Survey JobCode
9	Survey Provider	Provider
10	Survey Salary	Survey Salary

* Required Field

Define Salary Survey Mapping page

Note. The MARKET_PAY and WFR_SURVEY_DATA matrices are delivered with the system. You can also define configurable matrices to include market pay survey data.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices," Defining and Maintaining Configurable Matrices.

Matrix Field The system displays the values from the Matrix Definition page.

Target Field Select a value. These values come from the Job Code table.

Associating Market Pay Data to Job Codes

Access the Associate Mkt Pay to Job Codes page (Set Up HRMS, Product Related, Compensation, Market Pay, Associate Mkt Pay to Job Codes, Associate Mkt Pay to Job Codes).

Associate Mkt Pay to Job Codes

Set ID: SHARE Matrix Name: KUM001 Clerk Payroll 290080

Matrix Definition Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Description: Clerk Payroll Mkt Pay

Edit Matrix

Associated Job Codes Customize | View All | First 1 of 1 Last

Job Code	Description
1 290080	Clerk-Payroll Sr

Clerk Payroll 290080 (1980-01-01)

Geog Area	Currency	25th Percentile	50th Percentile	75th Percentile	100th Percentil	Base Mkt Ref	Variable TgtPot	Var Tgt Pot Ref	Mean Total Comp	Total Comp Ref
COUNTRIES	USD	26,000.00	27,000.00	27,500.00	28,000.00	27,000.00	10.00	2,700.00	29,000.00	30,000.00
MID ATLANTIC STATES	USD	24,000.00	25,000.00	25,500.00	26,000.00	25,000.00	10.00	2,500.00	27,000.00	28,000.00
MIDWEST REGION	USD	27,000.00	28,000.00	28,500.00	29,000.00	28,000.00	10.00	2,800.00	30,000.00	31,000.00

Associate Mkt Pay to Job Codes page

Click the Add button to create a new association between market pay data and job codes. Click Search to find existing values.

Edit Matrix

Click this button to access the Data Content page in the Matrix Definition component, where you can add, modify, or delete the Matrix Data field information.

Job Code

Select the job codes to which you want to associate the market pay matrix. You may link multiple job codes to one market pay matrix. However, a single job code can only be associated to one market pay matrix at a given time.

Associating Market Pay Data to a Single Job Code

Access the Market Pay Match page (Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Market Pay Match).

Job Code Profile | Evaluation Criteria | **Market Pay Match** | Default Compensation | Non-Base Compensation

Set ID: SHARE Job Code: 110000

Market Pay Match Find | View All | First 1 of 1 Last

Effective Date: 01/01/1980 Status: Active Go To Row

Description: Accountant

Matrix Name: MARKET_PAY Market Pay

Edit Matrix

Market Pay (1900-01-01)

Survey Job Code	Survey Provider	Description	Survey Salary	Currency	Mean Base Rate	Median Base Rat	Mean Total Comp	Med Total Comp	Midpoint Rate
MCD14	MCDONALD	Grimace	60000	usd	61,100.000000	62,000.000000	63,000.000000	60,000.000000	62,000.000000

Market Pay Match page

Note. You must be in Correct History mode to see new effective-dated matrix data for a job code. You can have only one market pay matrix associated with a single job code at a given time.

Matrix Name	Select the market pay matrix that you want to associate with this job code.
Edit Matrix	Click this button to access the Data Content page on the linked matrix, where you can view and edit values associated with this matrix.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices," Entering Data Content Fields.

Loading Market Pay Data from a File

Access the Load Market Pay Data from File page (Set Up HRMS, Product Related, Compensation, Market Pay, Load Market Pay Data from File, Load Market Pay Data from File).

Load Market Pay Data from File page

Required fields for the *input file* are SETID, EFFECTIVE DATE (date in the format yyyy-mm-dd), EFFECTIVE STATUS, DESCRIPTION, JOBCODE, MATRIX ID, The fields must be in the order shown. Also the fields in the matrix must follow the matrix ID and also be in the same order as they are in the matrix. We recommend that you open the file and verify the date format, as some utilities such as Excel might reformat your date differently than is displayed. You can format the date the correct way by defining it manually in Excel.

File Name	Enter the name of the file from which you want to import the market pay data.
File Location	Enter the location of the import file. You can also specify a machine name for a location in the format "\\machinename\directory".
Load Properties	Select Append to add the market pay information to the existing file. Select Overwrite to replace the data that is already in the system with the data that is in the file.

Loading Market Pay Data From Workforce Rewards

You can load market pay data by using the COMP_MKT_RATE_SYNC Integration Broker message and service operation published from Workforce Rewards. These new target market rates come from the WA_MKT_RATE_TBL.

Note. The COMP_MKT_RATE_SYNC service transaction loads the market rates into a delivered configurable matrix definition. If you want to load the data to a matrix with different fields, you would have to create a new message and service operation.

See *PeopleSoft Enterprise Workforce Rewards PeopleBook: "Managing Market Compensation"*

Loading Market Pay Data Manually

Access the Data Content page of the appropriate matrix.

Manually enter the market pay data into the Matrix Data group box.

Viewing Market Pay Data by Job Code

Access the Report Market Pay Data by Job Code page (Set Up HRMS, Product Related, Compensation, Market Pay, Report Market Pay Data by Job Code, Report Market Pay Data by Job Code).

Report Market Pay by Job Code

Set ID: SHARE Job Code: 170005

Matrix Definition

Effective Date: 08/03/2009 Matrix Name:

Effective Date: 01/01/1980 Matrix Name: KUM003

Admin Assistant 170005 (1980-01-01)

Geog Area	Currency	25th Percentile	50th Percentile	75th Percentile	100th Percentil	Base Mkt Ref
MIDWEST REGION	USD	38,000.00	39,000.00	40,000.00	42,000.00	39,000.00
NEW YORK METRO	USD	36,000.00	37,000.00	38,000.00	40,000.00	37,000.00
MID ATLANTIC STATES	USD	36,000.00	37,000.00	38,000.00	40,000.00	37,000.00

Report Market Pay by Job Code page

This page displays the current market pay data as well as previous and future market pay data when available.

Chapter 19

Setting Up Pay Calendars

This chapter discusses how to:

- Create balance IDs.
- Create pay run IDs.
- Create pay calendars and FLSA calendars.

Note. The information in this chapter applies to Oracle's PeopleSoft Enterprise Payroll for North America and Oracle's PeopleSoft Enterprise Payroll Interface. The information in this chapter does not apply to Oracle's PeopleSoft Enterprise Global Payroll.

See Also

.PeopleSoft Enterprise Global Payroll 9.1 PeopleBook

Creating Balance IDs

To create balance IDs, use the Balance ID Table (BALANCE_ID_TABLE) component.

This section provides an overview of balance IDs and discusses how to:

- Define balance IDs.
- View setIDs established for each company.
- Specify the quarter by company and year for each Balance Year ID.

Understanding Balance IDs

You can maintain balances by calendar year, fiscal year, benefit year, or any other method you want. Specify the start and end dates for each type of balance year you define, and the quarters, periods, and date ranges for each year. You can update, adjust, and report on balance information by various year types.

Note. You must set up one balance ID with the Bal for Calendar Year (balance for calendar year) option selected for each company for which you process payroll.

Pages Used to Create Balance IDs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Balance ID Table 1	BALANCE_ID_TBL1	- Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Balance ID Table, Balance ID Table 1 - Set Up HRMS, Product Related, Payroll Interface, Payroll, Balance ID Table, Balance ID Table 1	Create cycles for payroll processing according to pay group and define your balance year.
SetID - Comments	BALANCE_ID_PU	Click the Set ID button on the Balance ID Table 1 or Balance ID Table 2 page.	View the setID established for each company.
Balance ID Table 2	BALANCE_ID_TBL2	- Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Balance ID Table, Balance ID Table 2 - Set Up HRMS, Product Related, Payroll Interface, Payroll, Balance ID Table, Balance ID Table 2	Define the actual quarter definition by company and year for each Balance Year ID.

Defining Balance IDs

Access the Balance ID Table 1 page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Balance ID Table, Balance ID Table 1).

Balance ID Table 1

Balance ID Table 2

Set ID: BNUSA

Set ID

Balance ID: BX

*Description: BN_2003

Short Desc: BN'03

*Periods in a Year: 12

End Date Default

☐ None
☒ Month
☐ BiMonth
☐ Quarterly
☐ Days

*Quarters in a Year: 4

☒ Bal for Calendar Year
☒ Maintain Earns Bal
☒ Maintain Dedn Bal
☒ Maintain Check Bal
☒ Maintain Garn Bal

Yr:

Create

Use Date

☒ Check Date
☐ Period End Date

Balance ID details

Customize | Find | View All | 1-4 of 12

*Year	*Period	*Begin Date	*End Date	*Period Name	*Abbreviation		
2003	1	01/01/2003	01/31/2003	January	Jan	+	-
2003	2	02/01/2003	02/28/2003	February	Feb	+	-
2003	3	03/01/2003	03/31/2003	March	Mar	+	-
2003	4	04/01/2003	04/30/2003	April	Apr	+	-

Balance Id Table 1 page

Creating a Calendar Year Balance ID

To create a balance ID for the calendar year:

1. Select the Bal for Calendar Year check box.
2. Enter a year in the Year field.
3. Click the Create button.
4. Save the page.

All other fields become unavailable for entry. The system automatically creates the balance ID details for twelve periods in the year, four quarters in the year, and the end date default of *Month*.

Creating a Non-Calendar Year Balance ID

If you are creating a non-calendar year balance ID, you must specify values in the Periods in a Year/Quarters in a Year, End Date Default, Use Date, and Balance ID Details fields. You must also select the balances to be maintained.

Entering Values

Set ID	Click this button to access the SetID page, where you can see which balance setIDs are used for which companies. The setID for the Balance ID Table component is specified on the Company Table – Company Location page.
Balance ID	Entered on the Balance ID Table search page. Identifies a balance period, for example CY for Calendar Year, FY for Fiscal Year, or BY for Benefit Year. Once you establish a balance ID it should not be changed.
Periods in a Year	If you are not setting up a balance ID for a calendar year, specify the number of periods in a year.
Quarters in a Year	If you are not setting up a balance ID for a calendar year, specify the number of quarters in a year.
Bal for Calendar Year (balance for calendar year)	Select if you are setting up a balance ID for a calendar year. This causes the remaining check boxes and edit boxes on the page (except for Description and Short Desc) to become unavailable for entry. All balance types are automatically selected for the calendar year, and the Check Date option is automatically selected. However, the Yr field and Create button appear and become available for entry.
Yr (year)	Enter the year for which balances are to be created.
Create	Click this button to instruct the system to automatically populate the company, year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

End Date Default

If you are not setting up a balance ID for a calendar year, use this group box to specify the end date to apply for the calendar year.

None	Select if you do not want a specific end date for the calendar year.
Month, BiMonth, Quarterly, and Days	Select the corresponding option if you want a monthly, bimonthly, quarterly, or daily end date.
Maintain Earns Bal, Maintain Tax Bal, Maintain Dedn Bal, Maintain Check Bal, and Maintain Garn. Bal	If you are not setting up a balance ID for a calendar year, select the corresponding check box to maintain earnings balances, tax balances, deduction balances, paycheck balances, or garnishment balances for the year you are creating. Note. Each of these balances is maintained for the year being defined. For example, if you are defining a fiscal year and Maintain Earns Bal was selected, earnings balances for the fiscal year are maintained.

Use Date

If you are not setting up a balance ID for a calendar year, use this group box to select the balance types you want to maintain. You must set up the first period, begin date, and end date for each company and year. After you enter this, the begin and end dates are set by default automatically for each row for that company/year.

Check Date Select to maintain balances by the check date being processed. For example, if you are defining a fiscal year of July 1, 2006 - June 30, 2007 and your check date was June 23, 2007, the balance would be included in this fiscal year. If, however, the check date were July 1, 2007, the balance would be in the next fiscal year.

Period End Date Select to maintain balances by the period end date being processed. For example, if you are defining a fiscal year of July 1, 2006 - June 30, 2007 and your pay period end date was June 23, 2007, the balance would be included in this fiscal year. If, however, the pay period end date were July 1, 2007, the balance would be in the next fiscal year.

Balance ID Details

If you are not setting up a balance ID for a calendar year, use this group box to specify the year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

Note. For the first entry, enter values in the Year, Period, Begin Date, End Date, Period Name and Abbreviation fields; after you have entered this information, the values in the Year, Period, Begin Date and End Date fields are set by default automatically for any additional rows, based on the values entered in the previous row.

Year, Period, Begin Date, End Date, and Period Name Enter the year, period, begin date, end date, and period name for the balance type.

Abbreviation Enter the abbreviation for the period name.

Viewing SetIDs Established for Each Company

Access the Set ID - Comments page (click the Set ID button on the Balance ID Table 1 or Balance ID Table 2 page).

Comments

Balance SetID					
Customize Find View 100 First 1-4 of 1348 Last					
Set ID	Set Control Value	Record Group ID	Record (Table) Name		
AA	AA	PY_01	BALANCE_ID_TBL	+	-
AB	AB	PY_01	BALANCE_ID_TBL	+	-
AB	NPS	PY_01	BALANCE_ID_TBL	+	-
AC	AC	PY_01	BALANCE_ID_TBL	+	-

Comments page

The Set ID page displays the set ID established for each company. This helps you to know which set ID to enter for a specific company.

Specifying the Quarter by Company and Year for Each Balance Year ID

Access the Balance ID Table 2 page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Balance ID Table, Balance ID Table 2).

Balance ID Table 1

Balance ID Table 2

Set ID:

BNUSA

Set ID

Balance ID:

BX

BN_2003

BN'03

Periods in a Year:

12

Quarters in a Year:

4

End Date Default

☐ None
 ☒ Month
 ☐ BiMonth
 ☐ Quarterly
 ☐ Days

☒ Bal for Calendar Year

☒ Maintain Earns Bal

☒ Maintain Dedn Bal

☒ Maintain Tax Bal

☒ Maintain Check Bal

☒ Maintain Garn Bal

Use Date

☒ Check Date
 ☐ Period End Date

Balance ID details

Customize | Find | View All | First 1-4 of 4 Last

*Year	*Quarter	*Period Name	*Abbreviation	*From Period	*To Period		
2003	1	Quarter 1	Q1	1	3	+	-
2003	2	Quarter 2	Q2	4	6	+	-
2003	3	Quarter 3	Q3	7	9	+	-
2003	4	Quarter 4	Q4	10	12	+	-

Balance Id Table 2 page

If you selected the Bal for Calendar Year check box and clicked the Create button on the Balance ID Table 1 page, the field information for the Balance ID Table 2 page automatically appears.

If you did not specify a calendar year balance ID type on the Balance ID Table 1 page, you must enter a value for the Year, Quarter, Period Name, Abbreviation, From Period, and To Period fields. For each row that you add after the first, the Year, Quarter, and From Period fields are set by default, based on the value in the Quarters in a Year field.

See Also

[Chapter 19, "Setting Up Pay Calendars," Defining Balance IDs, page 480](#)

Creating Pay Run IDs

To create pay run IDs, use the Pay Run Table (PAY_RUN_TABLE) component. Use the PAY_RUN_TABLE component interface to load data into the tables for this component.

This section provides an overview and discusses how to create pay run IDs.

Understanding Pay Run IDs

Use pay run IDs to indicate to the system which pay calendar entries to process together. A pay run ID identifies a single pay calendar to process. If you have several pay groups, you can process them together in a single run by assigning them the same pay run ID.

Generally, all calendar entries that share a pay run ID have the same pay end date, but not necessarily the same pay frequency. For example, if you have a semi-monthly and a monthly pay calendar, both calendars can be processed together for the month-end run, because they have identical pay period end dates.

Note. A pay run ID must be unique throughout payroll history. You must create pay run IDs in the Pay Run table before you enter them on the pay calendar. The pay run ID may be up to 10 characters. PeopleSoft suggests that you use as many of the 10 available characters as is necessary to ensure that your pay run ID is easily identifiable.

Page Used to Create Pay Run IDs

Page Name	Definition Name	Navigation	Usage
Pay Run Table	PAY_RUN_TABLE	- Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Run Table, Pay Run Table - Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Run Table, Pay Run Table - Set Up HRMS, Product Related, Benefits NLD, Pay Run Table, Pay Run Table, Pay Run Table	Create pay run IDs to combine pay calendar entries from different pay groups for processing.

Creating Pay Run IDs

Access the Pay Run Table page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Run Table, Pay Run Table).

Pay Run Table

Pay Run ID:

*Description:

Short Description:

Pay Calendar Data			Find	View All	First	1 of 1	Last
Company		Pay Group					
GBI	Global Business Institute 9999	KLA GBI Monthly Pay Group					04/30/2004

Pay Run Table page

Short Description	Enter a short description of the pay run. This description appears on various delivered payroll reports (for example, PAY002, the Payroll Register). It also appears on the Run Control when you enter the pay run ID for Paysheet Creation, Payroll Calculation, and Payroll Confirmation.
Company, Pay Group, and Pay Period End Date	The Pay Calendar Data group box displays all the pay calendar entries grouped under the pay run ID. After you enter the pay run IDs on the Pay Calendar table, return to this page to check the pay calendar data assigned to each pay run ID.

Creating Pay Calendars and FLSA Calendars

To create pay calendars and FLSA calendars use the Create Pay Calendars (RUNCTL_PAY_CAL_BLD), FLSA Calendar Table (FLSA_CALENDAR), Initial FLSA Calendar (RUNCTL_FLSACALPD) components. Use the FLSA_CALENDAR component interface to load data into the tables for the FLSA Calendar Table component.

This section provides overviews of pay calendars and FLSA calendars and discusses how to:

- Set up FLSA calendars.
- Build pay calendars automatically.
- Build pay calendars manually.
- (USF) Review interface status and periods for federal leave accrual processing.
- Select error processing options.

Understanding Pay Calendars

Use pay calendars to schedule payroll cycles for your pay groups. Each entry on the pay calendar corresponds to a specific pay period, defined by its begin and end dates, for a pay group. A monthly pay group has 12 entries in the pay calendar, representing one year of processing.

This section discusses:

- Pay run ID assignment.
- Pay calendar creation.
- Automatic pay calendars.
- Manual pay calendars.

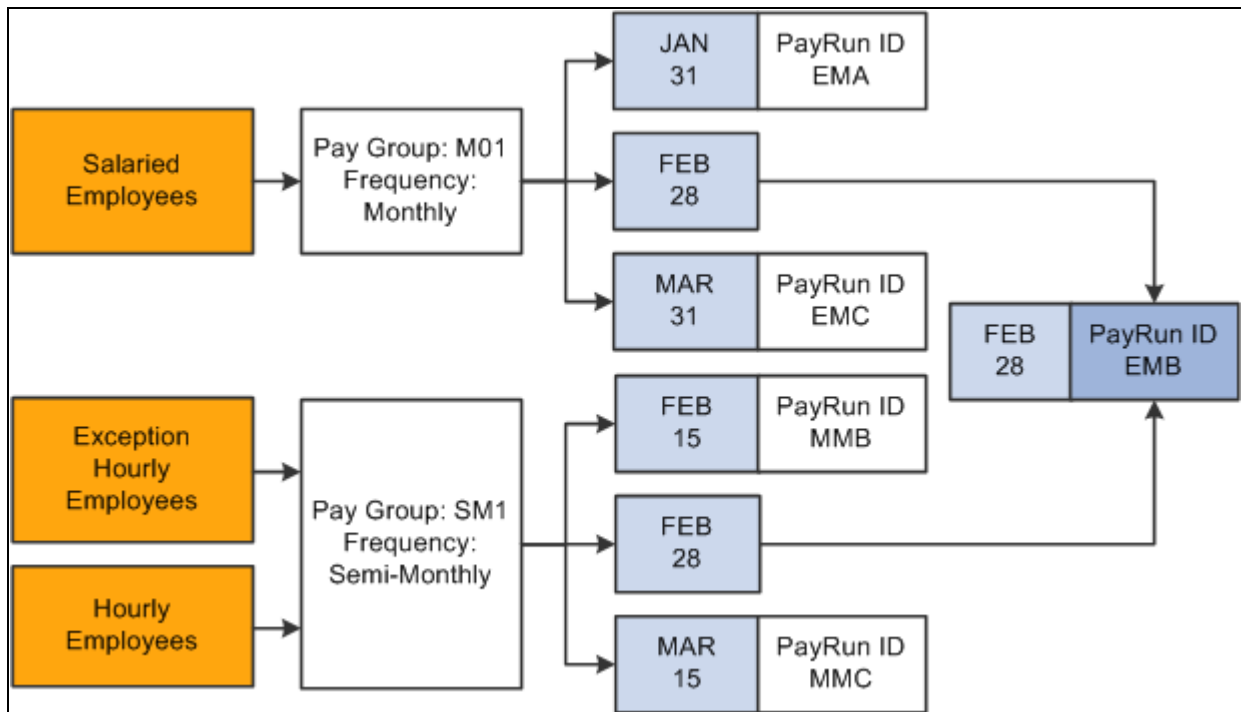
Pay Run ID Assignment

To process payrolls, the pay calendar entry being processed must be assigned a pay run ID. Generally, all pay calendar entries that share a pay run ID have the same pay end date, but not necessarily the same pay frequency. Typically, but not always, you would set up a different pay run ID for each Pay Period End Date on the Pay Calendar Table component.

Note. All pay groups attached to a single pay run ID must have the same setting in the Continue With Errors option on the Pay Group Table – Process Control page. If this condition is not met, the system cannot transfer any paysheets with errors for the pay run ID.

If you have a semi-monthly and a monthly pay calendar and set up both to continue processing with errors, you can process both calendar entries together for the month-end run, because they have the same pay period end date. Your processing schedule and Continue with Errors setting determine which groups can or can't be grouped together.

In the following illustration, CCB has assigned the same pay run ID (EMB) to both the February 28 Monthly calendar entry and the February 28 Semimonthly entry to enable the system to process them at the same time. For pay groups that do not share the same pay period end date, such as the Semimonthly mid-month pay period (February 15 or March 15), have their own pay run IDs (MMB and MMC). Both pay groups are set up for continue with errors processing:



Pay groups that share the same pay period end date can be assigned to the same pay run IDs while those with different pay period end dates should be assigned their own pay run ID

Pay Calendar Creation

Follow these steps to create pay calendars:

1. Set up a balance ID — required for the pay calendar.
2. Set up a pay run ID — required for the pay calendar.
3. Build the pay calendars — either automatically or manually.

You must create a calendar entry for every pay period for each pay group you set up. You must also assign a pay run ID to each calendar entry before you run the payroll.

Automatic Pay Calendars

To build pay calendars automatically, use the Create Pay Calendars page followed by the Pay Calendar Table page:

1. Use the Create Pay Calendars page to automatically build pay calendars.

The Create Pay Calendars page enables you to run the Calendar Build process (PSPCLBLD), which automatically generates the pay calendar entries for all or part of a year. To run the process:

- a. Set up the run control data.
- b. Run the process.
- c. Review any error messages.

Follow the same procedure for all pay groups. Each time you run the Calendar Build process, the system deletes the run control data. Therefore, whenever you rerun the process, you must enter the data again.

2. Use the Pay Calendar Table page to manually complete the pay calendar entries.

The Calendar Build process does not assign values to Pay Run ID, Accrual Percent, Reverse Accruals, Aggregate ID, Off-Cycle Calendar?, Off-Cycle Ded Override, General Ded Subset ID, Benefit Ded Subset ID, Benefit Deductions Taken, or General Deductions Taken fields on the Pay Calendar Table page. After you run the process, you must enter values for these fields manually. Although some of these fields are optional, you must assign a pay run ID to each calendar entry before you run the payroll.

Manual Pay Calendars

To build a pay calendar manually or to manually complete pay calendar entries for pay calendars that were built automatically, use the Pay Calendar Table page (PAY_CALENDAR_TABLE).

In general, you build stand alone, off-cycle pay calendars manually only to accommodate off-cycle processing, such as adjustments, online checks, or check reversals.

Understanding FLSA Calendars

You must define Fair Labor Standards Act (FLSA) calendars for each pay group in your company that has distinct FLSA periods and FLSA period start dates. You must add the FLSA Calendar ID to the system before you can complete the Pay Group table. The FLSA calendar requirement does not apply for pay groups that are defined as Fixed FLSA Period and have Use Basic Formula selected on the FLSA Period Definition page.

If several pay groups have the same FLSA periods and FLSA period start dates, you can use the same FLSA calendar for all of them.

The same process that creates pay calendars also creates FLSA Calendars.

Follow these steps to create FLSA calendars:

1. Set up the FLSA calendar on the FLSA Calendar Table page.

Enter the FLSA Calendar ID and specify period length and period start date.

2. Run the Calendar Build process from the Create Pay Calendars page.

If you did not set up the FLSA calendar before you ran the Calendar Build process, you can use the Create Initial FLSA Cal Period COBOL SQL process (PSPIFLSA) to build FLSA calendars. You can also use this process if pay group FLSA status is updated or changed.

3. To view the FLSA periods, return to the FLSA Calendar Table page.

Note. The system creates the FLSA calendar for the entire calendar year. The pay calendar dates do not affect the FLSA calendar.

Pages Used to Create Pay Calendars and FLSA Calendars

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FLSA Calendar Table	FLSA_CALEDAR	Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, FLSA Calendar Table, FLSA Calendar Table	Set up FLSA calendars.
Create FLSA Calendars	RUNCTL_FLSACALPD	Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Initial FLSA Calendar, Create FLSA Calendars	Run the Create Initial FLSA Cal Period COBOL SQL process (PSPIFLSA), which creates FLSA calendars for existing pay groups and pay calendars.
Create Pay Calendars	RUNCTL_PAY_CAL_BLD	- Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Create Pay Calendars, Create Pay Calendars - Set Up HRMS, Product Related, Payroll Interface, Payroll, Create Pay Calendars, Create Pay Calendars	Create pay calendars automatically. (After the pay calendars are built, use the Pay Calendar Table page to manually complete the pay calendar entries.)

Page Name	Definition Name	Navigation	Usage
Pay Calendar Table	PAY_CALENDAR_TABLE	• Payroll for North America, Payroll Processing USA, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Payroll for North America, Payroll Processing CAN, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Payroll for North America, Payroll Processing USF, Create and Load Paysheets, Review Pay Calendars, Pay Calendar Table • Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Calendar Table, Pay Calendar Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Calendar Table, Pay Calendar Table	Manually build a single pay calendar. Manually complete pay calendar entries for calendars that were created automatically. Review pay calendars.
Payroll Status	GVT_PAY_STATUS_SEC	Click the Federal button on the Pay Calendar Table page.	Indicate whether interfaces have been run and specify periods for Federal Leave Accrual processing.

Page Name	Definition Name	Navigation	Usage
Pay Confirm Options	PAY_CALENDAR_TBL2	- Payroll for North America, Payroll Processing USA, Create and Load Paysheets, Review Pay Calendars, Pay Confirm Options - Payroll for North America, Payroll Processing CAN, Create and Load Paysheets, Review Pay Calendars, Pay Confirm Options - Payroll for North America, Payroll Processing USF, Create and Load Paysheets, Review Pay Calendars, Pay Confirm Options - Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Calendar Table, Pay Confirm Options - Set Up HRMS, Product Related, Payroll Interface, Payroll, Pay Calendar Table, Pay Confirm Options	Select whether to bypass payroll messages during the Pay Confirmation process.
Pay Calendar Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Comp/Earnings Table Reports, Pay Calendar, Pay Calendar Report	Generate a report that lists information from the Pay Calendar Table component, which contains the cycles that you create for payroll processing by pay group. Each entry in the table corresponds to a pay period for a pay group.
Open/Close Pay Calendar	RUNCTL_PAY130	Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Open/Close Pay Calendar, Open/Close Pay Calendar	(USA) Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.

Page Name	Definition Name	Navigation	Usage
Open/Close Pay Calendar	RUNCTL_130CN	Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Open/Close Pay Calendar, Open/Close Pay Calendar	(CAN) Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.

Setting Up FLSA Calendars

Access the FLSA Calendar Table page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, FLSA Calendar Table, FLSA Calendar Table).

FLSA Calendar Table

FLSA Calendar ID: T28SATFRI

FLSA Period in Days: 28 FLSA Period Start Date: 05/30/1998

FLSA Dates	
FLSA Begin Date	FLSA End Date
05/30/1998	06/26/1998
06/27/1998	07/24/1998
07/25/1998	08/21/1998
08/22/1998	09/18/1998
09/19/1998	10/16/1998
10/17/1998	11/13/1998
11/14/1998	12/11/1998
12/12/1998	01/08/1999

FLSA Calendar Table page

FLSA Calendar ID The FLSA Calendar ID that you added or selected in the entry page displays here. Use the FLSA Calendar ID to link an FLSA calendar to a pay group. For example, an FLSA Calendar ID of 14, MON-SUN, would be linked to pay groups whose pay period is 14 days and whose FLSA pay period begins on Monday and ends on Sunday. This ID is then used on the FLSA Period Definition page to associate the FLSA calendar to the pay group.

FLSA Period in Days Use this field to define the length of the FLSA period for this Calendar ID. The information you enter here is used with the FLSA Period Start Date to determine the FLSA Begin Dates and FLSA End Dates, which display on this page after you've created FLSA calendars.

FLSA Period Start Date Use this field to define the starting date from which succeeding FLSA periods are set. You should set this field to the earliest start date of any of the pay groups that use this FLSA Calendar ID.

Note. After you create the FLSA calendar using the Calendar Build process, the FLSA Calendar Table page becomes display-only. Each row in the FLSA Dates group box displays the FLSA Begin and End Dates for one FLSA work period. After you create the FLSA calendar and it becomes display-only, you cannot make any changes or corrections.

See Also

Chapter 19, "Setting Up Pay Calendars," Understanding FLSA Calendars, page 489

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USA) Setting Up Additional U.S. Payroll Functionality," Setting Up for FLSA Calculation

Building Pay Calendars Automatically

Access the Create Pay Calendars page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Create Pay Calendars, Create Pay Calendars).

Create Pay Calendars

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Pay Calendar Information

*Company:

*Pay Group:

*Pay Period End Date:

Check Dt Days From Pay End Dt:

Pay Periods Per Year:

Pay Year:

Define Years

Calendar Yr Run:	1	Pay Yr Run:	1
Fiscal Yr Run:	1	Leave Yr Run:	1

Create Pay Calendars page

Note. Use the Create Pay Calendars page to set up and run the Calendar Build process. Once the calendars are built, use the Pay Calendar Table page to assign pay run IDs and other information.

Note. You must set up the calendar year balance ID before creating calendars.

Pay Period End Date	Enter the first pay period end date for the pay calendar. For example, for a semi-monthly payroll for 2009, enter <i>01/15/2009</i> . To build a pay calendar for a partial calendar year, enter the end date of the pay period where you want the calendar to start. In other words, to start the calendar for the pay period ending on March 15, enter <i>03/15/2009</i> .
Check Dt Days From Pay End Dt	Enter a value representing the number of days (plus or minus) from the pay period end date to the check issue date. For example, if the pay period end date is January 31 and the check date is February 3, set the number of days to <i>3</i> . If the pay period end date is January 31 and the check date is January 30, enter <i>-1</i> . Should the check date fall on a holiday or weekend day, the system automatically searches backwards on the calendar to find the first workday before the holiday or weekend day to issue checks.
Pay Periods Per Year	The number of pay periods per year appears. This number depends on the Pay Frequency assigned to the pay group.
Pay Year	(USF) This field appears only for U.S. federal customers. The IRR process requires a pay year. When processing IRRs, the IRR Fiscal Data accumulator identifies all monies that come from the pay year. Enter the pay year to which the pay calendar applies.

(USF) Define Years

This group box appears only for U.S. federal customers.

Calendar Yr Run (calendar year run)	This value is used by federal leave processing on particular leave types for which accrual begins with the calendar year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the leave plan calendar year. For example, for a monthly payroll there are twelve pay calendars in a year. January would be the starting point, so enter <i>1</i> in this field.
Pay Yr Run (pay year run)	This value is used by federal annual leave accrual processing on leave types for which accrual begins with the pay year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the pay year for leave accrual processing.
Fiscal Yr Run (fiscal year run)	This value is used by federal annual leave accrual processing on leave types for which accrual begins with the fiscal year. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the fiscal year for leave accrual processing.

Leave Yr Run (leave year run)

This value is used by federal annual leave accrual processing only. Of the calendar entries to be created automatically, enter the pay calendar number that identifies which pay period is designated to begin the annual leave year.

Note. The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

See Also

[Chapter 19, "Setting Up Pay Calendars," \(USF\) Reviewing Interface Status and Periods for Federal Leave Accrual Processing, page 502](#)

[Chapter 19, "Setting Up Pay Calendars," Understanding Pay Calendars, page 487](#)

Building Pay Calendars Manually

Access the Pay Calendar Table page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Calendar Table, Pay Calendar Table).

Pay Calendar Table		Pay Confirm Options									
Company:	GBI Global Business Institute 9999	☐ Off-Cycle Calendar?	☐ Off-Cycle Ded Override								
Pay Group:	KC3 Canadian Semi-Monthly	Federal									
Pay Period End Date:	01/31/2009	Pay Run ID:									
*Pay Period Begin Date:	01/16/2009	Aggregate ID:									
Pay Period Close Date:	01/31/2009	*Paycheck Issue Date:	01/30/2009								
Weeks in this Period:	2	Balance ID details Find View All First 1 of 1 Last									
*Pay Periods Per Year:	24	<table border="1"> <thead> <tr> <th>Balance ID</th> <th>Year</th> <th>Quarter</th> <th>Period</th> </tr> </thead> <tbody> <tr> <td>CY</td> <td>Cal. Year</td> <td>2009</td> <td>1 1</td> </tr> </tbody> </table>		Balance ID	Year	Quarter	Period	CY	Cal. Year	2009	1 1
Balance ID	Year	Quarter	Period								
CY	Cal. Year	2009	1 1								
Accrual Percent:		☐ Reverse Accruals	*FLSA On-Cycle Pay End Date: 01/31/2009								
*Benefit Deductions Taken:	Deduction	Benefit Ded Subset ID:									
*General Deductions Taken:	Deduction	General Ded Subset ID:									
Pay Period of the month	☐ First ☒ Second ☐ Third ☐ Fourth ☐ Fifth										
☐ Paysheets Run	☐ Payroll Confirmation Started	☐ TL Extract costs	☐ Payroll Distribution Run								
☐ Payroll Preliminary Calc Run	☐ Payroll Confirmation Run	☐ Off-Cycle Calcs Outstanding	☐ GL Interface Run								
☐ Payroll Calculation Run	☐ Single Check for Multiple Jobs	☐ Off-Cycle Closed	☐ CA Payroll Distribution Run								
			☐ CA GL Interface Run								

Pay Calendar Table page

Off-Cycle Calendar?	Select to identify the pay calendar as off-cycle processing. Two types of processing are associated with a pay calendar: on-cycle and off-cycle. On-cycle processing is the normal, scheduled payroll processing for a pay group and pay period. Off-cycle processing is any other payroll activity that deviates from the norm. Typically, off-cycle activity consists of recording manual checks issued during this period, on-demand checks calculated and issued during this period, and reversals processed during this period. This option enables you to run a group of off-cycle checks that are associated with a specific check date which may differ from your on-cycle check date.
Off-Cycle Ded Override (off-cycle deduction override)	For an off-cycle run, select this check box to specify that the Pay Calculation process should use the deduction override process to determine deductions. If Off-Cycle Calendar is selected and Off-Cycle Ded Override is deselected, then the deduction override evaluation process is bypassed during pay calculation. That means that employee-level benefit or general deduction override will not take effect. This might be useful for an off-cycle bonus run.
Federal	(USF) Click this button to access the Payroll Status page. This button appears only for U.S. federal customers.
Pay Period End Date	The pay period end date appears here. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determines if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day. The pay calculation program uses these dates to determine which deductions and additional pays to use.
Pay Period Begin Date	Enter the pay period begin date. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determine if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day. The pay calculation program uses these dates to determine which deductions and additional pays to use.
Pay Run ID	Select a pay run ID. Each payroll batch process must have a pay run ID to determine what pay groups to process. All pay calendar entries with the same pay run ID are processed at the same time. Before you start payroll processing for a pay period, you must assign a pay run ID on this page, and that ID must first be defined on the Pay Run Table page. The Payroll Process cannot run without a pay run ID.

Aggregate ID

(USA) Enter an aggregate ID to indicate aggregate taxation. Entering a value here tells the system to aggregate taxation for the entire pay group.

Normally, you use the aggregate tax method when you must pay employees more than once in a single pay period, such as a temporary staffing agency paying employees for multiple assignments within a weekly pay period. The system aggregates all pay calendars with the same aggregate ID value (including off-cycle payrolls) for the purposes of tax calculations. All wages paid on calendars with the same aggregate ID are combined, then annualized and taxed accordingly.

Note. If you add stand-alone off-cycle calendars to be aggregated together, the pay period end date must be the day after the first confirmed check's pay period end date.

If you enter the same aggregate ID on multiple pay calendars, then for a given employee, each succeeding check (whether off-cycle or on-cycle) calculated under each of these pay calendars is aggregated with all of the already-calculated qualifying checks of the previous pay calendars which were set up using the same aggregate ID.

If a pay calendar has a unique aggregate ID, then for a given employee, succeeding off-cycle and on-cycle checks are aggregated with any already-confirmed qualifying off-cycle checks for that pay calendar.

To aggregate taxation across checks, you must also set up the earnings code with *Specified on Paysheet* specified as the tax method and you must manually specify *Aggregate* as the tax method on off-cycle paysheets.

See *PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook*, "(USA) U.S. Tax Methods and Calculations," Aggregate Taxation of Multiple Checks.

Paycheck Issue Date

Select a paycheck issue date. This date appears on the employee's paycheck or advice slip. It determines the Calendar Year, Quarter, and Period for all payroll balances. In addition, the system uses the paycheck issue date to find the appropriate effective-dated entry in the tax tables to use for this pay calculation.

Note. The system updates employee balances (such as taxes, deductions, and earnings) based upon the check date on the pay calendar you are processing with, not the check date on the paysheet or check. These dates are often the same, but not always.

Weeks in this Period

Enter a value to indicate the number of weeks within the payroll cycle. Depending on the state in which your employees are based, you may need to use this field for tax reporting. The number of weeks is based on the number of Wednesdays in the pay period.

Pay Periods Per Year

Enter a value to indicate the number of pay periods per year. When the system calculates deductions, it checks the deduction table, annualizes the amount of each deduction, and then divides the result by the number of pay periods per year.

Example: If you set up a deduction for \$100 per month, the system multiplies \$100 by 12 to arrive at \$1200, and then, for employees paid monthly, divides by 12 to arrive at a deduction of \$100 per pay period. For semi-monthly employees, the system divides the deduction by 24.

For weekly and biweekly pay periods, it is not quite so simple. Depending on the day of the week on which the payday falls, there may be 53 (instead of 52) weekly pay periods during a given year; likewise, there may be 27 (instead of 26) biweekly pay periods. To accommodate this situation, in the Pay Periods Per Year field, specify whether the pay calendar you're defining has 26, 27, 52, or 53 Pay Periods Per Year.

The system always annualizes amounts by multiplying by 52, 26, 24, or 12, depending on whether the deduction is weekly, biweekly, semimonthly, or monthly; it de-annualizes by dividing by the number you enter for the number of pay periods per year.

Note. For monthly and semi-monthly pay calendars, the Pay Periods Per Year field is unavailable for entry; the only valid values are 12 and 24.

Balance ID Details

This group box displays the year, quarter, and period applicable to the pay period for each balance ID for which you're maintaining balances.

Accrual Percent

Enter an accrual percent to calculate accrual totals for the general ledger interface. This percentage is typically used to process pay periods that overlap accounting periods or don't correspond to calendar months. For example, if payroll is processed weekly, but general ledger is processed monthly, you may need to make adjustments. If you specify a percent here, that percent of pay for the last pay period of the month is added to accrual amounts for the general ledger interface. Then, in the first pay period of the following month, you can reverse those accruals by selecting the Reverse Accruals check box and leaving the Accrual Percent field deselected. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface.

Reverse Accruals

Select to reverse accruals added to the General Ledger Interface. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface. However, if you select this check box, you must leave the Accrual Percent field deselected. If the Accrual Percent field is not deselected, you must deselect the Reverse Accruals check box.

Note. The Accrual Percent field and Reverse Accruals check box are not applicable to PeopleSoft Payroll for North America for E&G.

FLSA On-Cycle Pay End Date	Select a pay end date for FLSA off-cycle processing. This field applies only to off-cycle calendars. For on-cycle calendars, this field is unavailable for entry. If the earnings being paid in the off-cycle are subject to FLSA (Affect on FLSA check box on the Earnings Table – General page is not set to None), enter the on-cycle pay end date to which the earnings should be applied. The system uses this date to determine the correct FLSA period.
Benefit Deductions Taken	Select a value to indicate how to take benefit deductions for this pay run. The default value is <i>Deduction</i>. • <i>None</i>: Select this value if you do not want to take benefit deductions. • <i>Deduction</i>: Select this value if you want to use the regular benefit deductions defined on the Deduction Table pages for these employees. This is the default value. • <i>Subset</i>: Select this value if you want to use a specified benefit deduction subset. If you select this value, you must specify the subset ID in the Benefit Ded Subset ID (benefit deduction subset ID) field.
Benefit Ded Subset ID (benefit deduction subset ID)	Specify the subset ID if you selected Subset in Benefit Deductions Taken.
General Deductions Taken	Select a value to indicate how to take general deductions for this pay run. The default value is <i>Deduction</i>. • <i>None</i>: Select this value if you do not want to take general deductions. • <i>Deduction</i>: Select this value if you want to use the regular deductions defined on the Deduction Table pages for these employees. This is the default value. • <i>Subset</i>: Select this value if you want to use a specified general deduction subset. If you select this value, you must specify the subset ID in the General Ded Subset ID (general deduction subset ID) field.
General Ded Subset ID (general deduction subset ID)	Specify the subset ID if you selected Subset in General Deductions Taken.
Pay Period of the Month	Use this option to assign a pay period to the earnings and deductions designated for this calendar entry. When you create paysheets, the system checks if the pay period for additional pay matches the pay period being processed, then adds the additional pay to the paysheet. During Pay Calculation, if the pay period for a deduction matches the pay period being processed, the system takes the deduction from gross pay. Select the corresponding option to specify the pay period of the month you want: <i>First</i> , <i>Second</i> , <i>Third</i> , <i>Fourth</i> , and <i>Fifth</i> .

Reviewing Payroll Milestones

The check boxes across the bottom of the Pay Calendar Table page are unavailable for entry. The system maintains this section, which consists of process indicators, or milestones, that indicate how far along you are in the payroll process for this calendar entry. For example, if you have already created paysheets, completed your final Pay Calculation, and run Pay Confirmation, the system selects several check boxes on the Pay Calendar Table page, representing the steps you have already completed.

The background programs and SQRs maintain these indicators. During payroll processing, the system queries these indicators to verify that you are running the payroll batch processes in the correct order.

Off-Cycle Closed	After an on-cycle payroll is confirmed for the next pay period, the system selects the Off-Cycle Closed check box, and you can no longer run off-cycle payrolls against this calendar.

Note. You can use the Open/Close Pay Calendar process (PAY130 or PAY130CN) to open the calendar (deselect the off-cycle closed check box) to process year end adjustments. After the adjustments are processed, run the PAY130 or PAY130CN to close the calendar. This process only opens or closes the last on-cycle calendar of the year.

Payroll Distribution Run	Selected when the non-commitment accounting GL distribution has been run.

GL Interface Run	Selected when the (non-commitment accounting) accounting lines have been created.

CA Payroll Distribution Run (commitment accounting payroll distribution run)	Selected when the commitment accounting GL distribution has been run.

CA GL Interface Run (commitment GL interface run)	Selected when the commitment accounting GL Interface has been run.

Note. You should run the GL interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If GL Interface Run or CA GL Interface Run is selected, you cannot rerun the process until resetting the check box. The GL interface check boxes have no effect on processing adjustments for the pay period. You can still run adjustments until the Off-Cycle Closed check box is selected.

You should run your GL Interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL Interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If GL interface Run is selected, you cannot rerun the process until resetting the check box and it has no effect on processing adjustments for the pay period. You can still run adjustments until the Off-Cycle Closed check box is selected.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Defining Deductions," Creating Deduction Subsets

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Working with Checks and Direct Deposit"

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances"

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Defining Deductions"

(USF) Reviewing Interface Status and Periods for Federal Leave Accrual Processing

Access the Payroll Status page (click the Federal button on the Pay Calendar Table page).

Payroll Status

☒ Leave Accrual Run

Interface Status

☐ RITS Interface Run ☐ TSP Interface Run ☐ Treasury Interface Run

Pay Year

Pay Year: Pay Period Number:

Year Indicators

☐ Calendar Year Begins ☐ Leave Year Begins ☐ Leave Year Ends

☐ Pay Year Begins ☐ Fiscal Year Begins

Payroll Status page

Payroll Status**Leave Accrual Run**

This check box is updated by the Leave Accrual process that you run after payroll is confirmed.

Interface Status

The check boxes in this group box indicate whether the RITS Interface, TSP Interface, or the Treasury Interface has been run for the pay calendar. The system updates these fields.

Pay Year

Pay Year The IRR process requires a Pay Year. When processing IRRs, the IRR Fiscal Data Accumulator identifies all monies that come from the Pay Year. Enter the pay year to which this pay calendar applies.

Year Indicators

The system completes the first four check boxes based on the run control parameters you enter when you run the Calendar Build process. If you need to change these values, you can manually update the calendar after it is built.

Calendar Year Begins This check box is used by federal annual leave accrual processing only. If the pay calendar is for a pay period designated to begin the Leave Plan Calendar Year for a particular Leave Type, select this check box.

Leave Year Begins This check box is used by Federal Annual Leave Accrual processing only. If the pay calendar is for a pay period designated to begin the Annual Leave year, select this check box.

Note. The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

Pay Year Begins This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Pay Year. If the pay calendar is for a pay period designated to begin the Pay Year for Leave Accrual processing, select this check box.

Fiscal Year Begins This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Fiscal Year. If the pay calendar is for a pay period designated to begin the Fiscal Year for Leave Accrual processing, select this check box.

Leave Year Ends This check box is for your information only. It enables you to identify the pay calendar that is intended to represent the leave year end.

Selecting Error Processing Options

Access the Pay Confirm Options page (Set Up HRMS, Product Related, Payroll for North America, Payroll Processing Controls, Pay Calendar Table, Pay Confirm Options).

Pay Calendar Table		Pay Confirm Options
Company:	GBI Global Business Institute 9999	☐ Off-Cycle Calendar?
Pay Group:	KC3 Canadian Semi-Monthly	
Pay Period End Date:	01/31/2009	☐ Continue With Errors
Error Pay End Date:	01/31/2009 	

Pay Confirm Options page

Off-Cycle Calendar? If you selected this check box on the Pay Calendar Table page, this check box is selected—if you did not, the check box is deselected.

If you select this option, you must process the pay calculation for the transferred paysheets using the run parameters on the left side of the run control page. If you do not select this option, the system assumes that you are linking the transferred paysheets to an existing off-cycle paysheet that is linked to an on-cycle calendar.

Continue With Errors Select this check box if you want the payroll process to continue when the system encounters error messages that are defined for the Continue With Errors functionality.

Error Pay End Date Select an error pay end date that represents the end date of the off-cycle payroll in which you want to correct and pay the employees who are bypassed during the regular pay run. Be sure that you have an off-cycle pay calendar set up for the pay end date that you select.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Setting Up the Payroll Process," Setting Up Continue with Errors Processing

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Calculating Pay," Reviewing Payroll Messages and Correcting Errors

Chapter 20

Setting Up Company Tax Tables for North America

This chapter discusses how to:

- (USA) Set up the Company State Tax table.
- (USA) Set up the Company Local Tax table.
- (CAN) Set Up the Canadian Company Tax table.
- Define tax locations.

Note. The tax tables discussed in this chapter are required for both the Payroll for North America and Payroll Interface applications. The PeopleBook for each of these applications discusses additional tax data setup that is specific to the application.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Setting Up Payroll Tax Tables"

PeopleSoft Enterprise Payroll Interface 9.1 PeopleBook, "Setting Up Tax Data"

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(CAN) Canadian Tax Method Calculations"

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "(USA) U.S. Tax Methods and Calculations"

(USA) Setting Up the Company State Tax Table

To set up the Company State Tax table, use the Company State Tax Table component (CO_STATE_TAX_TBL) or Agency State Tax Table USF component (CO_STATE_TAX_TBL) and Tax Collector Table component (TAX_COLLECTOR_TBL).

This section discusses how to:

- Define states where you collect or pay taxes.
- Identify the voluntary disability plans.
- Enter general ledger account numbers for state taxes.

Pages Used to Set Up the Company State Tax Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General	CO_STATE_TAX_TBL	- Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, General - Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, General - Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, General	Set up an entry in the Company State Tax Table for each state where your organization collects or pays taxes.
VDI/FLI	CO_STATE_TAX_TBL2	- Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, VDI/FLI - Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, VDI/FLI - Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, VDI/FLI	Identify the voluntary disability plans associated with the company.

Page Name	Definition Name	Navigation	Usage
GL Accounts	CO_STATE_TAX_TBL3	- Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, GL Accounts - Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Agency State Tax Table USF, GL Accounts - Set Up HRMS, Product Related, Payroll Interface, Payroll, Company State Tax Table, GL Accounts	Enter your general ledger account numbers for state taxes.
Company State Tax Report	PRCSRUNCNTRL	- Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Company State Tax, Company State Tax Report - Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Agency State Tax USF, Company State Tax Report	Run TAX704 to print information from the Company State Tax Table, which identifies the states in which your company collects and pays taxes.

Specifying States Where You Collect or Pay Taxes

Access the Company State Tax Table - General page (Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, General).

General

VDI/FLI

GL Accounts

Company:

BN1

Company BN1

State:

CA

California

Company State Tax Information

Find | View All | First 1 of 1 Last

*Effective Date:

01/01/1980

*Status:

Active

State Withholding

Employer ID:

94-1111111

☐ Non-Resident Declaration Reqd

State Unemployment

☐ Exempt From SUT

☐ Health Care Coverage

Employer ID:

49-1111111

☐ Override

Experience Rate Percent:

MA Health Insurance Rate:

Effective Year:

Effective Quarter:

Branch Code:

UBI Number:

EAF Rate:

State Disability

☐ Exempt From ER Disability

Effective Year:

Effective Quarter:

Experience Rate Percent:

Company State Tax Table - General page

The State field in State Tax Data 1 and Local Tax Data is edited against this table. You must create entries in this table before entering any state and local tax information for your employees.

State Withholding

- Employer ID

Enter your state employer ID for state withholding.
- Non-Resident Declaration Reqd

This check box is selected or deselected by default according to the Federal/State Tax Table 1 record for the state. Indicates whether the state requires a Non-Resident Declaration for non-resident employees.

State Unemployment

Exempt From SUT	Select this check box if the company is not required to pay SUT for this state. Use this option if you've specified, on the Company table, that the company as a whole is not exempt from SUT. If you select it here, Exempt from SUT becomes the default at the employee level; employees hired in this state have this check box selected on the State Tax Data page. See Chapter 20, "Setting Up Company Tax Tables for North America," Setting Up SUT Exemptions To Generate Data for the TAX002, TAX810 and TAX860 Reports, page 510.
Employer ID	Enter your state employer ID for state unemployment.
Override	(MA only.) The Massachusetts standard Health Ins Rate is set by default from the State Tax table. For Massachusetts, the Health Insurance Rate differs for newer employers. If you're a Massachusetts employer to whom a lower rate applies, select this check box and enter the correct Massachusetts Health Ins Rate.
Experience Rate Percent	The experience rate you enter in the State Unemployment group box should reflect the rate you receive from your state unemployment agency. Enter the year and quarter when the rate becomes effective in the Effective Yr/Qtr field. This enables you to have different rates within a single calendar year.
MA Health Insurance Rate	(MA only.) If you select Override, enter the correct health insurance rate.
Branch Code	This field is informational for Arizona. TAX860AZ.SQR appends the branch code to the end of the state EIN.
UBI Number (unified business ID number)	If the company you're adding is in Washington State, enter the UBI number assigned. Used for quarterly reporting for companies in the State of Washington only.
EAF Rate (employment administration fund rate)	If the company you're adding is in Washington State, enter the EAF rate used to calculate an additional tax for the Employment Administration Fund, which finances work search assistance and training for the unemployed. Used for quarterly reporting for companies in the State of Washington only.

State Disability

Exempt From ER Disability	Select this check box if employees in this state are exempt from employer-paid state disability tax. This field is for informational purposes only and is not used by the system.

Experience Rate Percent The experience rate you enter in the State Disability group box should reflect the rate you receive from your state disability agency. Enter the year and quarter when the rate becomes effective in Effective Tax Yr/Qtr. This enables you to have different rates within a single calendar year.

Note. You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. A record for a subsequent quarter is required only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error "SUT rate not found on Company/State Tax table" during Pay Calculation. This error occurs regardless of the pay end date you are processing.

Employer ID (E&G) Enter the appropriate employer ID for state disability grouping in California, Michigan, and Minnesota. The T002CAHP, T002MIHP, and T002MNHP reports are grouped by employer ID if you enter the employer ID here and select the Separate Tax Report check box on the run control page. The report lists state withholding, state unemployment, and state disability.

Setting Up SUT Exemptions To Generate Data for the TAX002, TAX810 and TAX860 Reports

The TAX002, TAX810, and TAX860 reports are generated based on SUT wages. When you select the *Exempt From SUT* field on this page, the system does not generate taxable wages, and the TAX002, TAX810, and TAX860 reports will contain no data.

Perform the following to generate taxable earnings, enabling the TAX002, TAX810, and TAX860 reports to produce the required wage detail reporting data, while still remaining exempt from State Unemployment Taxes:

1. Ensure that the Company Exempt from SUT field on the Company Table-FICA/Tax Details page is deselected.
2. Leave the Exempt From SUT field on the Company State Tax Table - General page deselected.

These steps should ensure that the Exempt From SUT field on the State Tax Data page remains clear for each employee. Verify that the Exempt From SUT field is clear on all three pages.

3. Enter a dummy number in the State Unemployment Employer ID field on the Company State Tax Table – General page.
4. Enter a value of 0 (zero) in the State Unemployment Experience Rate.

After you do these steps, the system can track taxable wages without calculating SUT tax dollars. The TAX002, TAX810, or TAX860 report can report the SUT subject wages.

Identifying Voluntary Disability Plans

Access the Company State Tax Table - VDI/FLI page (Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, VDI/FLI).

General		VDI/FLI		GL Accounts	
Company:	GBI	Global Business Institute 9999			
State:	NJ	New Jersey			
Company State Tax Information Find View All First 1 of 1 Last					
Effective Date:	01/01/2009	Status:	Active		
Voluntary Disability Plan					
☒ Voluntary Disability Plan					
Plan Number:	NJPLAN1				
VDI Administrator Code:	VDIBOTHPAY				
Effective Year:	2009				
Effective Quarter:	1 First Qtr				
Employee Rate Percent:	0.50000				
Employer Rate Percent:	0.50000				
State Family Leave Insurance					
☒ Voluntary Family Leave Plan					
FLI Plan Number:	NJFLI1				
FLI Administrator Code:	KUFLIADM				
Effective Year:	2009				
Effective Quarter:	1 First Qtr				
Employee Rate Percent:	0.00050				
Employer Rate Percent:	0.00050				

Company State Tax Table - VDI/FLI page

This page includes nearly identical sections for setting up information for your VDI (voluntary disability insurance) plan and your voluntary state family leave insurance plan.

Voluntary Disability Plan

Voluntary Disability Plan	Select this check box to indicate that the plan you're defining is a voluntary disability plan allowed by the state.
Plan Number	Enter the plan number of the voluntary disability plan. For New Jersey, this number appears on Form W-2.
VDI Administrator Code	Select the code that identifies the administrator of the plan. You maintain administrator codes on the VDI/FLI Administrator Table page.
Employee Rate Percent	Enter the employee-paid rate.
Employer Rate Percent	Enter the employer-paid rate.

To set up VDI with a rate of zero so that you can track the VDI wages, enter 99.99999 as the Employee Rate Percent and Employer Rate Percent on this page.

State Family Leave Insurance

Voluntary Family Leave Plan Select this check box to indicate that the plan you're defining is a voluntary family leave plan allowed by the state.

FLI Plan Number Enter the plan number of the voluntary family leave insurance plan.

FLI Administrator Code Select the code that identifies the administrator of the plan. You maintain administrator codes on the VDI/FLI Administrator Table page.

Employee Rate Percent Enter the employee-paid rate.

Employer Rate Percent Enter the employer-paid rate.

To set up FLI with a rate of zero so that you can track the FLI wages, enter 99.99999 as the Employee Rate Percent and Employer Rate Percent on this page.

Entering General Ledger Account Numbers for State Taxes

Access the Company State Tax Table - GL Accounts page (Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Company State Tax Table, GL Accounts).

General		VDI/FLI		GL Accounts	
Company:	BN1	Company BN1			
State:	CA	California			
Company State Tax Information Find View All First 1 of 1 Last					
Effective Date:	01/01/1980	Status:	Active		
GL Liability # Non Commit Acct					
SWT:					
SUT (Employee):					
SUT (Employer):					
SDI (Employee):					
SDI (Employer):					
VDI (Employee):					
VDI (Employer):					
FLI (Employee):					
VFLI (Employee):					
VFLI (Employer):					

Company State Tax Table - GL Accounts page

Enter the general ledger account numbers, if applicable, for the following company liabilities:

SWT	State Withholding liabilities.
SUT (Employee)	State Unemployment employee liabilities.
SUT (Employer)	State Unemployment employer liabilities.
SDI (Employee)	State Disability employee liabilities.
SDI (Employer)	State Disability employer liabilities.
VDI (Employee)	Voluntary Disability employee liabilities.
VDI (Employer)	Voluntary Disability employer liabilities.
FLI (Employer)	State family leave insurance employee liabilities.
VFLI (Employee)	Voluntary family leave insurance employee liabilities.
VFLI (Employer)	Voluntary family leave insurance employer liabilities.

(USA) Setting Up the Company Local Tax Table

To set up the company local tax table, use the Company Local Tax Table component (COMP_LOCAL_TAX_TBL).

This section discusses how to set up company local tax table entries.

Note. You must complete the Company Local Tax table before local tax data for employees is entered because the locality field on the Local Tax Data page is edited against this table.

Pages Used to Define an Entry for the Company Local Tax Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Company Local Tax Table	COMP_LOCAL_TAX_TBL	- Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Company Local Tax Table, Company Local Tax Table - Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Agency Local Tax Table USF, Company Local Tax Table - Set Up HRMS, Product Related, Payroll Interface, Payroll, Company Local Tax Table, Company Local Tax Table	Set up an entry in the Company Local Tax Table page for each locality where the organization withholds or pays taxes.
Company Local Tax Report	PRCSRUNCNTRL	- Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Company Local Tax, Company Local Tax Report - Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Agency Local Tax USF, Company Local Tax Table	Run TAX705 to print information from the Company Local Tax Table, which identifies the localities for which your organization collects and pays taxes.

Setting Up Company Local Tax Table Entries

Access the Company Local Tax Table page (Set Up HRMS, Product Related, Payroll for North America, Local Taxes, Company Local Tax Table, Company Local Tax Table).

Company Local Tax Table

Company: BN1 Company BN1
 State: CA California
 Locality: 67000 SAN FRANCISCO ER TAX

Company Local Tax Information Find | View All First 1 of 1 Last

*Effective Date: 03/01/1998 *Status: Active
 Employer ID: 94-111111

GL Account Number

Local Withholding Tax for Non Commitment Accounting

Employee:

Employer:

Company Local Tax Table page

Employer ID This field is used for local withholding tax for this locality. It is set by default to the Employer ID for state withholding taxes on the Company State Tax table.

GL Account Number - Local Withholding Tax for Non Commitment Accounting

These accounts are General Ledger accounts for use with local withholding tax; they are only used by the PayGL01 process. Only GL information not subject to Commitment Accounting would use these accounts.

Employee and Employer If you have general ledger account numbers to which you post liability for local withholding tax for this locality, enter the employee and employer account numbers here.

(CAN) Setting Up the Canadian Company Tax Table

To set up Canadian company tax information, use the Company Tax Table component (CO_CAN_TAX_TABLE) and the Wage Loss Plan Table component (WAGELS_PLN_TBL).

This section discusses how to:

- Set up the Canadian Company Tax Table.
- Define wage loss plans.

Pages Used to Set Up the Canadian Company Tax Table

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Company Tax Table	CAN_USR_TAX_TABLE1	• Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Company Tax Table, Company Tax Table • Set Up HRMS, Product Related, Payroll Interface, Payroll, Company Tax Table CAN, Company Tax Table	Identify the Prescribed Interest Percent, Province, Provincial Premium Tax Percent, and Health Insurance Rate Override for each company you set up.

Setting Up the Canadian Company Tax Table

Access the Company Tax Table page (Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Company Tax Table, Company Tax Table).

Company Tax Table

Company: CFN Canadian Company CFN

Company Tax Information Find | View All | First 1 of 1 Last

***Effective Date:** 01/01/1997

Prescribed Interest Percent: 6.000

Company Tax Rates Customize | Find | View All | First 1-5 of 5 Last

*Province	Provincial Premium Tax Percent	Health Insurance Rate Override		
MB	0.00	0.045000	+	-
NF	4.00	0.000000	+	-
NS	3.00	0.000000	+	-
PE	3.00	0.000000	+	-
QC	2.35	0.000000	+	-

Company Tax Table page

Note. It is your responsibility to update all rates on the Company Tax Table.

Company Tax Information

Prescribed Interest Percent

If your company processes low interest loans, enter the current prescribed interest percent. This rate is updated quarterly by the Canadian federal government.

Warning! It is your responsibility to update the Prescribed Interest Percent field according to the rate set each quarter by the Canadian federal government. PeopleSoft does not update this field in its tax updates; PeopleSoft leaves the field blank.

Company Tax Rates

Use these fields to enter company-specific overrides to provincial tax rates.

Important! The system ignores override values of zero. If the override value is 0.00, the system calculates taxes using the rates on the provincial tax tables.

Province

Enter all applicable provinces in which the company operates and needs to process PPT tax or override a Health Insurance Rate.

Provincial Premium Tax Percent	Enter the provincial premium tax percent applicable to group life and health insurance benefit plan premiums, if your company is responsible for withholding and submitting the tax.
Health Insurance Rate Override	Enter the health insurance rate override to specify the premium rate that applies to your company, if that rate is different from the rate defined on the Canadian Tax Table Provincial Rates page. This field applies to companies operating in provinces, such as Ontario and Manitoba, where variable rates apply based upon total gross payroll figures.

Defining Tax Locations

To define tax locations, use the Tax Location Table component (TAX_LOCATION_TBL). Use the TAX_LOCATION_TBL component interface to load data into the tables for this component.

This section provides an overview of tax locations and discusses how to:

- Establish the locations for which you process payroll and taxes.
- Associate provinces, states, and localities with the tax location code.

Understanding Tax Locations

The system sets up federal, state, and local employee tax data and tax distribution data according to the information you specify in the Tax Location table. In this table, you establish each of your locations with a Tax Location ID and identify the work states, provinces, and localities associated with each tax location.

Note. If you've selected Automatic Employee Tax Data on the Installation table, the system automatically sets up tax data for each work and resident state and locality of each of your employees. Tax distribution records are created for the work state/locality if the tax location represents a single state/locality.

Pages Used to Define Tax Locations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tax Location Table - Address	TAX_LOCATION_TBL1	- Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Location Table, Address - Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Location Table, Address - Set Up HRMS, Product Related, Payroll Interface, Payroll, Tax Location Table, Address	Establish the locations for which you process payroll and taxes.
Tax Location Table – State/Province/Locality	TAX_LOCATION_TBL2	- Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Location Table, State/Province/Locality - Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Location Table, State/Province/Locality - Set Up HRMS, Product Related, Payroll Interface, Payroll, Tax Location Table, State/Province/Locality	Associate a province or any number of states, localities, and linked localities with the tax location code.
Tax Location Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll for North America, Tax Table Reports, Tax Location, Tax Location Report	Generate PAY718 that lists information from the Tax Location table.

Establishing the Locations for Which You Process Payroll and Taxes

Access the Tax Location Table - Address page (Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Location Table, Address or Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Location Table, Address).

The screenshot shows the 'Tax Location Table - Address' page. At the top, there are two tabs: 'Address' and 'State/Province/Locality'. The 'Address' tab is selected. Below the tabs, the 'Tax Location Code' is 'B-003' and the '*Status' is 'Active'. A section titled 'Tax Location Information' contains the following fields:

- *Description: Walnut Creek Branch
- Short Desc: Wal Crk Br
- Country: USA United States
- Address: 1616 Main St, Walnut Creek, CA 94596
- Alaska Area Code: (empty field)

An 'Edit Address' button is located next to the address field.

Tax Location - Address page

Tax Location Code Establish a tax location code for each location for which you process payroll and tax data. You can associate any number of states and localities with each code.

Alaska Area Code If applicable, select an Alaskan area code.

Note. If you select Automatic Employee Tax Data on the Installation table and assign a Tax Location ID to each employee in the Job data, each employee's tax data is set by default on the Employee Tax Data page and the Employee Tax Distribution page.

Associating Provinces, States, and Localities with the Tax Location Code

Access the Tax Location Table – State/Province/Locality page (Set Up HRMS, Product Related, Payroll for North America, Federal/State Taxes, Tax Location Table, State/Province/Locality or Set Up HRMS, Product Related, Payroll for North America, Canadian Taxes, Tax Location Table, State/Province/Locality).

Address		State/Province/Locality	
Tax Location Code: B-003		Walnut Creek Branch	
Status: Active			
Tax Location Information			
Customize Find View All First 1 of 1 Last			
*State / Province	Locality	Locality Name	Other Work Locality
CA			

Tax Location Table - State/Province/Locality page

State / Province

Use to identify each state that is associated with the tax location code. You can associate any number of states with a single tax location. For each state, identify each taxing locality, if any.

The states you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

Locality

The localities you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

Other Work Locality

Use this field only where multiple local taxes apply in one location, such as:

- Paducah, KY and McCracken County, KY.
- Earned Income Tax, and Emergency and Municipal Service Tax in Pennsylvania.

To form further links in a locality chain:

- Add another row with the same state.
- Enter the other work locality from the previous row in Locality.
- Enter the new work locality.

Note. You should never attempt to enter multiple Indiana localities. Regardless of the number of Indiana locations in which an employee may work, either simultaneously or over the course of the year, the employee is liable for Indiana county tax for only one Indiana county per calendar year. This is the Indiana county of residence as of January 1, if that county imposes a tax, or the Indiana county of principal work activity as of January 1, if the residence county does not impose a tax.

Note. Locality and Other Work Locality are not required in Canada, because a Canadian employee can be taxed in only one province at a time, and there are no locality taxes in Canada.

See Also

Chapter 11, "Setting Up Organization Foundation Tables," page 229

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce"

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Maintaining Payroll Data,"
Understanding Split Local Tax Distribution for KY, AL, and OR

Chapter 21

Setting Up Vendors

This chapter provides an overview of vendor tables and discusses how to enter vendor information.

Understanding Vendor Tables

This section discusses vendors and the integration between HRMS and PeopleSoft Enterprise Payables.

Vendors

A vendor is any agency or organization that the company sends money to on behalf of a worker or that the company uses to withhold money from a person's paycheck. Vendors can be:

- Benefit providers
- Garnishment payees
- Tax collectors

The system stores information about the vendor in the Vendor table. It holds the information necessary to make payments to a vendor and the policy information for a benefit provider.

Integration with Enterprise Payables

Enterprise Payables, Enterprise Payroll for North America and Enterprise Human Resources, Manage Base Benefits use Integration Broker to populate each other's Vendor tables.

Note. If you are using PeopleSoft Enterprise Payables to pay your vendors, we recommend that you enter and update vendors in the Vendor table through PeopleSoft Payables and export the Vendor table to PeopleSoft Human Resource Management System (HRMS).

Warning! If you update vendors through the HRMS tables, the contact information is exported to the Payable system. However, any changes to existing vendor bank information that are made through HRMS will not be exported to the Payables system.

Integration Points

Before using the integration to maintain the Vendor table, configure the Integration Broker nodes and activate the appropriate queues, handlers, and routings for these service operations:

Service Operation	Description
VENDOR_FULLSYNC	Payables publishes all contents of the Vendor table to the HRMS Vendor table.
VENDOR_SYNC	Payables publishes updates in the Vendor table to the HRMS Vendor table.

To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository on My Oracle Support.

See Also

Interactive Services Repository in the Implementation Guide section of My Oracle Support.

Chapter 38, "Working with Integration Points in Enterprise HRMS," page 941

Enterprise PeopleTools PeopleBook: Integration Broker

PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Integrating with PeopleSoft Payables," Maintaining Vendor Information

Entering Vendor Information

To enter vendor information, use the Vendor Control (VENDOR_CONTROL), Vendor Information (VNDR_ID), Provider/Vendor Table (PROVIDER_TABLE), Payee Table (GARNISH_PAYEE_TBL), and Payee Table USF (GVT_GARNISH_PAYEE) components.

This section provides an overview of vendor setup pages and discusses how to:

- Identify vendor prefixes.
- Enter basic vendor information.
- Enter vendor address information.
- Display alternate names for use on payments.
- Identify vendor locations.
- Enter bank account information.
- Enter payment processing information.
- Enter vendor contact information.
- Enter benefit policy information.
- (USF) Enter garnishment payee contact information.

- (USF) Enter garnishment payee distribution information.

Understanding Vendor Pages

To enter vendor information, you will complete the following pages:

- AP Vendor Control
- Vendor Information
- Addresses
- Locations
- Contacts
- Policy Information

AP Vendor Control

This is used only if you want PeopleSoft Payables to pay the vendor. It provides a mechanism for identifying the different types of vendors.

Vendor Information

This page creates the vendor code and identifies the name and type of vendor you are entering.

Addresses

This is a strictly address information and should not be confused with location. You can enter multiple addresses for the different sites a vendor might have.

Locations

A vendor location is not a physical address. It is a default set of rules, or attributes, which define how you conduct business with a particular vendor. A vendor's location comprises information such as payment terms, remittance information, bank account information, and so on. Although a location is not an address, it will reference addresses.

Your vendor may need only one location. If the vendor uses the same set of rules across its business, you can simply enter one location for your vendor, and you're ready to go. If, however, your vendor uses different sets of rules for different portions of its business (different branches, sites, or offices, for example) you can set up the vendor with multiple locations, each with its own unique set of business rules.

Contacts

This page is used to enter information about the people whom you contact on a regular basis. You can enter an unlimited number of vendor contacts and identify their roles so that you can easily determine whom you should contact if you have questions, or discern why a contact might want to talk to you, before you return their call.

Policy Information

Policy information is necessary for benefit providers. You will link this vendor and policy information using the Benefit Plan table in Base Benefits.

Pages Used to Set Up Vendors

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
AP Vendor Control	VNDR_CNTRL	Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Control, AP Vendor Control	Identify the prefix assigned to the vendor in PeopleSoft Payables.
Vendor Information	VNDR_ID1	- Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Vendor Information - Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Vendor Information, Vendor Information - Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Vendor Information, Vendor Information	Enter basic vendor information.
Addresses	VNDR_ADDRESS	- Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses - Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Addresses - Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Addresses	Enter a vendor's address information.

Page Name	Definition Name	Navigation	Usage
Alternate Names	VNDR_ADDR_ALTN	Click the Alternate Names link on the Vendor Information - Addresses page.	Enter any alternate name for use on payments.
Phone Information	VNDR_ADDR_PHN	Click the Phone Information link on the Vendor Information - Addresses page.	Enter a vendor's phone information for addresses. You can enter more than one phone number per address.
Email Address	VNDR_ADDR_EMAILID	Click the Email Address link on the Vendor Information - Addresses page.	Enter a vendor's email addresses.
Locations	VNDR_LOC	- Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations - Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Locations - Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Locations	Enter address and remittance information.
Bank Accounts	VNDR_BANK_ACCOUNT	Click the Bank Accounts link on the Vendor Information - Locations page.	Enter banking information for the vendor.
Bank Address	VNDR_BANK_ACCT2	Click the Bank Accounts link on the Vendor Information - Locations page and then the Bank Address link on the Bank Accounts page.	Enter the bank's address information. The bank's Country defaults from the Bank Accounts page. The form of the address fields varies, depending on the country.
Phone Details	VNDR_BANK_ACCT3	Click the Bank Accounts link on the Vendor Information - Locations page and then the Phone Details link on the Bank Accounts page.	Enter phone information for the bank.

Page Name	Definition Name	Navigation	Usage
Comments	VNDR_LOC_COMMENTS	Click the Comments link on the Vendor Information - Locations page.	Enter notes or comments about locations.
Payment Options	VNDR_PAY	Click Payment Options on the Vendor Information - Locations page.	Enter payment processing rules for the vendor location.
Contacts	VNDR_CNTCT	- Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Contacts - Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Contacts - Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table, Contacts	Enter a vendor's contact person. Enter more than one phone number if necessary.
Phone Information	VNDR_CNTCT_PHN	Click Phone Information on the Vendor Information - Contacts page.	Enter a contact's telephone information.
Policy Information	VNDR_POLICY	- Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Providers/Vendors Table, Policy Information - Set Up HRMS, Product Related, Payroll for North America, AP-Vendor, Vendor Information, Policy Information	Enter information about policies and whom to contact about them.
Garnishment Payee Table	GVT_GARN_PAYEE	Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table USF, Garnishment Payee Table	Enter garnishment payee contact information for U.S. federal government.
Deduction Distribution Information	GVT_GARN_DIST_SEC	Click the Distribution Information button on the Garnishment Payee Table page.	Enter garnishment payee distribution information for U.S. federal government.

Identifying Vendor Prefixes

Access the AP Vendor Control page (Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Control, AP Vendor Control).

AP Vendor Control

Set ID: BNUSA Benefit Administration

Auto Numbering

☒ Use Auto-Numbering

HRMS Vendor ID Prefix:

Last Vendor ID Assigned: 0

AP Vendor Control page

- Use Auto-Numbering**

PeopleSoft Payables has the option of using an autonumbering feature to assign IDs to new vendors.
- HRMS Vendor ID Prefix**

If you selected the auto-numbering check box, enter a prefix that is used identify HRMS vendors.

Entering Basic Vendor Information

Access the Vendor Information page (Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Vendor Information).

Vendor Information		Addresses	Locations	Contacts	Policy Information
Set ID:	BNUSA	Vendor:	BNFTE		
Vendor Name					
*Name 1:	BNFTE				
Name 2:					
*ShortName:	BNFTE	BNFTE-001			
Vendor Classification					
*HRMS Class:	P	General Provider			
*Status:	Approved				
*Persistence:	One Time				

Vendor Information page

Name 1

Enter the payee name as it should appear on the check.

HRMS Class (HRMS classification)

This field identifies the HRMS classification used to create views so you see the appropriate vendors on the appropriate tables.

It is also used to identify tax and non-tax deductions when the system extracts deductions to create AP vouchers.

Available values are:

- *Credit Card Supplier (C)*
- *General Deduction (D)*
- *Garnishment Payee (G)*
- *National Health Service Provider (H)*
- *Industrial Insurance Board Provider (I)*
- *Imp Partner Provider (M)*
- *General Provider (P)*
- *Tax Collector (T)*

For benefit providers, select *P* for General Provider.

Status

For HRMS vendors, select *Approved*. The other values are used by Enterprise Payables.

Persistence

For HRMS vendors, select *Regular*. The other values are used by Enterprise Payables.

Entering Vendor Address Information

Access the Addresses page (Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Addresses).

The screenshot displays the 'Vendor Information - Addresses' page. The 'Addresses' tab is active. The page header shows 'Set ID: BNUSA' and 'Vendor: BNFTE'. The 'Vendor Address' section contains the following fields:

- Address:** 1
- Description:** (empty text box)
- *Address Type:** Business (dropdown menu)

Below the 'Vendor Address' section is the 'Address Detail' section, which includes:

- Effective Date:** 01/01/1980
- Status:** Active
- Country:** USA (United States)
- Address:** 4460 Hacienda Dr, Pleasanton, CA 94588

An 'Edit Address' button is located next to the address field. At the bottom of the page, there are three links: 'Alternate Names', 'Phone Information', and 'Email Address'.

Vendor Information - Addresses page

Address Type

Enter the one or more addresses for the vendor.

If you are using PeopleSoft Payables at least one address should be the remittance address. This is the address that is used when creating payment vouchers.

Premium Payment and *Remittance* are the only valid address types for deduction recipients. If any other address type is displayed for this vendor, contact your Accounts Payable department.

Premium Payment generally applies to benefit deductions and *Remittance* applies to all other types of deductions including taxes.

Displaying Alternate Names for Use on Payments

Access the Alternate Names page (click the Alternate Names link on the Addresses page).

Alternate Names

Alternate Name 1:

Alternate Name 2:

Alternate Names page

Alternate Name 1 and **Alternate Name 2**

When the system generates payments for the location using this address, Enterprise Payables needs to use a name different from the one entered on the Vendor Information page, enter the name here.

Identifying Vendor Locations

Access the Provider/Vendor Table - Locations page (Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Locations).

Vendor Information

Addresses

Locations

Contacts

Policy Information

Set ID: BNUSA

Vendor: BNFTE

BNFTE

Vendor Location

Find

View All

First

1 of 1

Last

Location: TEST FLOOR

Description:

☒ Default

+

-

Location Detail

Find

View All

First

1 of 1

Last

*Effective Date:

01/01/1980

31

Status:

Active

▼

+

-

Remit Vendor

*Vendor:

BNFTE

🔍

Location:

TEST FLOOR

🔍

*Address:

1

🔍

[Bank Accounts](#)

[Comments](#)

[Payment Options](#)

Vendor Information - Locations page

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Location	Enter an identifier for the location information you are entering. If more than one location is set up for the vendor, you can use the previous page and next page links on the Vendor Location bar to display information for the location in which you're interested.
Default	Select this check box if you want this location to automatically print on the vouchers for this vendor. Only one location can be selected as the default.
Remit Vendor	This is the information about the vendor to whom payments will be sent. You need to select the codes that identify the name of the vendor receiving the payments, vendor location, and address where the payment is sent.
Bank Accounts	Click this link to display the Bank Accounts page. Work with the Payroll department to set up this information.
Comments	Click this link to display the Comments page.
Payment Options	Click this link to display the Payment Options page. Work with the Payroll department to set up this information.

Entering Bank Account Information

Access the Bank Accounts page (click the Bank Accounts link on the Locations page).

Bank Accounts

Set ID: BNUSA Vendor: BNFTE Location: TEST FLOOR

Vendor Bank Accounts Find | View All First 1 of 1 Last

☐ Default	Description:	+	-
Bank ID Qual:	Branch ID:	Bank ID:	
Acct Type:	Account Nbr:	Check Digit:	
DFI Qualifier:	DFI ID:		

[Bank Address](#) [Phone Details](#)

Bank Accounts page

Default	The Default check box is selected if this is the default bank account for the location. The default bank account is copied to each payment schedule for this vendor.
Bank ID Qual	The country-specific numeric value by which the bank/counterparty is identified. This value controls how the bank/counterparty pages edit and display bank information.
Branch ID	The branch ID for the bank, if appropriate.
Bank ID	The Bank ID for the bank.
Acct Type (account type)	The account type for the bank, <i>Bond</i> , <i>Checking Account</i> , and <i>Life Insurance</i> , for example.
Account Nbr	The vendor's bank account number.
Check Digit	The check digit used by the bank.
DFI Qualifier	If you make automatic clearing house (ACH), wire, or EFT payments to this vendor location, this field should display the appropriate DFI Qualifier: The value determines the format for the DFI ID field. • <i>Transit Number</i>: The DFI ID is exactly 9 digits, plus check digit calculation. • <i>Swift ID</i>: The DFI ID is 8 or 11 characters; positions 5 and 6 must be a valid 2-character country code. • <i>CHIPS ID</i>: The DFI ID is 3 or 4 digits. • <i>Canadian Bank Branch/Institute</i> and <i>Mutually Defined</i>: No validation for DFI ID. The DFI Qualifier determines the format of the bank's DFI ID.
DFI ID	The bank's DFI ID. The format is determined by the value displayed in the DFI Qualifier field.
Bank Address	Select Bank Address for the Bank Address page.
Phone Details	Select Phone Details for the Phone Details page.

Entering Payment Processing Information

Access the Payment Options page (click the Payment Options link on the Locations page).

Payment Options

Set ID: BNUSA Vendor: BNFTE Location: TEST FLOOR

Payment Control	Bank
☐ Hold Payments ☒ Separate Payment	Bank ID: Bank Account:
Payment Handling	Payment Method
*Flag: Default from Higher Level ▼ Code: ▼	*Flag: Default from Higher Level ▼ Code: ▼

Payment Options page

Payment Control

Hold Payments

If this check box is selected, PeopleSoft Payables automatically places payments for this vendor on hold.

Separate Payment

If this check box is selected, PeopleSoft Payables creates a separate payment for each voucher, even if the system processes multiple vouchers for the vendor in the same pay cycle.

Bank

Bank ID

The code for the bank from which you want to make payments for this vendor.

Bank Account

The account from which payments will be made to this vendor.

Payment Handling

Flag

This field determines the payment handling instructions.

- *Default from Higher Level:* The payment handling instructions for the vendor come from the control hierarchy.
- *Specify at this Level:* The payment handling instruction for the vendor appears in the Code field.

Code

If you select Specify at this Level in the Flag field, this field displays the payment handling instructions your accounts payable department follows when issuing payments for this vendor:

- *High Dollar Payment.*
- *Internal Distribution.*
- *Regular Payments.*
- *Route to Purchasing.*

Payment Method**Flag**

This field determines the payment method:

- *Default from Higher Level:* The payment method for the vendor comes from the control hierarchy.
- *Specify at this Level:* The payment method for the vendor appears in the Code field.

Code

If you select Specify at this Level in the Flag field, this field displays the payment method for this vendor:

- *Automated Clearing House.*
- *Customer Initiated Draft.*
- *Direct Debit.*
- *Draft - Customer EFT.*
- *Electronic Funds Transfer (EFT).*
- *Giro - EFT.*
- *Giro - Manual.*
- *Letter of Credit.*
- *Manual Check.*
- *System Check.*
- *Treasury Wire Flat File.*
- *Vendor Initiated Draft.*
- *Wire Report.*

Entering Vendor Contact Information

Access the Contacts page (Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Contacts).

Vendor InformationAddressesLocationsContactsPolicy Information

Set ID: BNUSAVendor: BNFTEBNFTE

Vendor Contact

Find | View All | First 1 of 1 | Last

Sequence No: 1Description:

Vendor Detail

Find | View All | First 1 of 1 | Last

Effective Date: 01/01/1980Status: Active

Type:

Contact Name:

Title:

Address:

URL:Description:

Phone Information

Vendor Information - Contacts page

Sequence No (sequence number)

This number is automatically assigned to this contact.

Type

Select the type of contact.

Address

Select one of the addresses that you entered on the Addresses page.

URL

Enter the contact's website address.

Phone Information

Click this link to display the Provider/Vendor Table - Contacts: Phone Information page.

Entering Benefit Policy Information

Access the Policy Information page (Set Up HRMS, Product Related, Payroll for North America, AP-Vendors, Vendor Information, Policy Information).

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Vendor Information

Addresses

Locations

Contacts

Policy Information

Set ID: BNUSA

Vendor: BNFTE

BNFTE

Policy Information

Find | View All | First 1 of 1 Last

*Group Number: 12345

Policy Number: 123123

Policy Begin Date: 01/01/1980

Policy End Date:

Policy URL ID

General Policy URL ID:

Authorized Providers URL ID:

Policy Contacts

Customize | Find | View All | First 1 of 1 Last

Sequence	Contact Type	Contact Name

Policy Information page

- General Policy URL ID

Select the vendor's website address that provides general policy information.
- Authorized Providers URL ID

Select the vendor's website address that contains a list of authorized participating providers
- Sequence

Select a contact from the list of contacts that were entered on the Provider/Vendor Table - Contacts page. After you select the contact, the Contact Name automatically appears.

(USF) Entering Garnishment Payee Contact Information

Access the Garnishment Payee Table page (Set Up HRMS, Product Related, Payroll for North America, Garnishments, Payee Table USF, Garnishment Payee Table).

Garnishment Payee Table

*Payee Name:Bank of Montreal

Address 1:

Address 2:

Address 3:

Address 4:

City:

County:

State:

Postal Code:Country:

Contact Name:

Telephone:

Distribution Information

Garnishment Payee Table page

Distribution Information

Click this button to access the Deduction Distribution Information page.

(USF) Entering Garnishment Payee Distribution Information

Access the Deduction Distribution Information page (click the Distribution Information button on the Garnishment Payee page).

Deduction Distribution Information

Payment Information

Payment Method: EFT

Payee Name:

Payee ID:

Electronic Funds Transfer Info

Routing Number:

Account Number:

Account Type:

Check Address Information

Country: USA United States

Payee Name:

Address 1:

Address 2:

City:
 Zip:

State:

Deduction Distribution Information page

Enter the payment information.

Payment Method For EFT distributions, select *EFT* as the payment method and specify the remittance state and FIPS code in addition to the account information.

See Also

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Administering Garnishments," Entering Garnishment Deduction Distribution Information

PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook, "Administering Garnishments," (USA) Specifying EFT Information for Child Support Garnishments

Chapter 22

Setting Up and Working with Group Definitions

This chapter provides an overview of group build and discusses how to:

- Set up group definitions.
- Set up group security.
- Refine groups in PeopleSoft applications.
- View group results and reports.
- Purge group results.

Understanding Group Build

This section discusses how to:

- Use the group build feature.
- Create a group.

Using the Group Build Feature

The Group Build feature provides a standard way to create groups of people in HRMS. Once you've created a group, you can use it for a variety of purposes.

You might want to apply a business process to a group of individuals that crosses job, department, or even company lines. For example, you might want to offer a special bonus plan to your organization's research and development teams. The group includes everyone in departments 10200 through 10500. Using the Group Build feature, you can create a group consisting of departments 10200 through 10500 and administer the group's incentive plan using the Variable Compensation module. Later, someone else can administer salary increases to the same group using the Base Compensation and Budgets module. You define the group only once.

You can define groups in Group Build and use those groups in HRMS applications such as:

- PeopleSoft Enterprise Time and Labor
- PeopleSoft Enterprise Benefits Administration

- PeopleSoft Enterprise Stock Administration
- ePerformance
- The following PeopleSoft Enterprise Human Resources business processes:
 - Manage Base Compensation and Budgeting
 - Report Total Compensation
 - Manage Variable Compensation
 - Manage Labor Administration

Creating a Group

Creating a group in PeopleSoft HRMS involves three steps:

1. Define the population that belongs to the group.
2. Set up group security.
3. Refine dates and other application-specific parameters in individual PeopleSoft applications (if necessary).

Note. These steps are designed for experienced users who are familiar with the record and field structures in PeopleSoft HRMS.

Use Group Build pages to:

- Select the records, fields, and values that define the group.
- Set up the group's security.

Groups for Manage Variable Compensation

To use an existing review group later in the Manage Variable Compensation business process, link the existing group ID to a node in the Variable Compensation Group Tree in the Manage Variable Compensation business process.

Group build comes with a group ID of No Group that is required for Variable Compensation processing. The group ID *NOGROUP* is used for Variable Compensation plans without groups. It is a reserved group ID, and you cannot create a Group ID of *NOGROUP* in the Group Build application.

Setting Up Group Definitions

To set up group definitions, use the Group Build Records and Fields component (GB_REC_FIELD), Group Criteria component (GB_CRITERIA_TABLE), Group Build - Group Definition component (GB_GRP_DEFN_TABLE), and Group Build from Co./Dept. component (RUNCTL_GBP003).

This section provides overviews of group definitions, query definition, and automatic generation of department groups and discusses how to:

- Select fields for use in group criteria and definitions.
- Define a group criteria.
- Create a group profile.
- Specify records, fields and field values for a group.
- View records, fields, and field values for a group.
- View and sort group members.
- Create groups from departments.

Understanding Group Definitions

To define a group's population:

1. (Required unless using a query.) On the Group Build Records and Fields component (GB_REC_FIELD), select the fields for each record available to make them available to create group criteria on the Group Criteria page (GB_GRP_CRIT1_TBL) and Group Definition page (GB_GRP_DEF2_TBL).

See [Chapter 22, "Setting Up and Working with Group Definitions," Selecting Fields For Use in Group Criteria and Definitions, page 548.](#)

2. (Optional) Create a group criteria on the Group Criteria page.

Group criteria are like building blocks of records and fields that you can use repeatedly to create different groups. For example, if your organization operates several business processes based on workers' department and union memberships, you may want to create a group criteria ID called DEPT AND UNION CODE. Once you've created the group criteria ID, you can use it to define a variety of groups.

<i>Record Name</i>	<i>Field Name</i>
Job	Department
Job	Union Code

See [Chapter 22, "Setting Up and Working with Group Definitions," Defining a Group Criteria, page 549.](#)

3. Attach a group criteria ID or query to the group definition on the Group Profile page (GB_BRP_DEFN1_TBL).

On the Group Profile page, you can use a group criteria ID and queries as part of a group's definition.

- Using a group criteria ID.

If you use a group criteria ID, you can define additional records, fields, and field values on the Group Definition page. You can use only one group criteria per group.

See [Chapter 22, "Setting Up and Working with Group Definitions," Creating a Group Profile, page 550.](#)

- Using PeopleSoft Query.

If you use PeopleSoft Query, you can choose an existing query or create a new one. Using queries provides access to a broader set of system records than the thirty-two records that are available through the Group Criteria page or Group Definition page. However, a query must follow certain rules to be used in a group definition. You can attach only one query to a group definition.

See [Chapter 22, "Setting Up and Working with Group Definitions," Understanding Query Definition for Group Build, page 545.](#)

4. Define or refine the group by selecting records, fields, and field values on the Group Definition page.

If you included a group criteria ID in the group definition, you must use the Group Definition page to attach the appropriate field values to the fields and records in the Group Criteria. You can also add any other records, fields, and values that you want to include in the group's definition.

If you've included a query in the group definition, you can't make any further selections on the Group Definition page.

You can also define a group entirely on the Group Definition page, without attaching a group criteria or query.

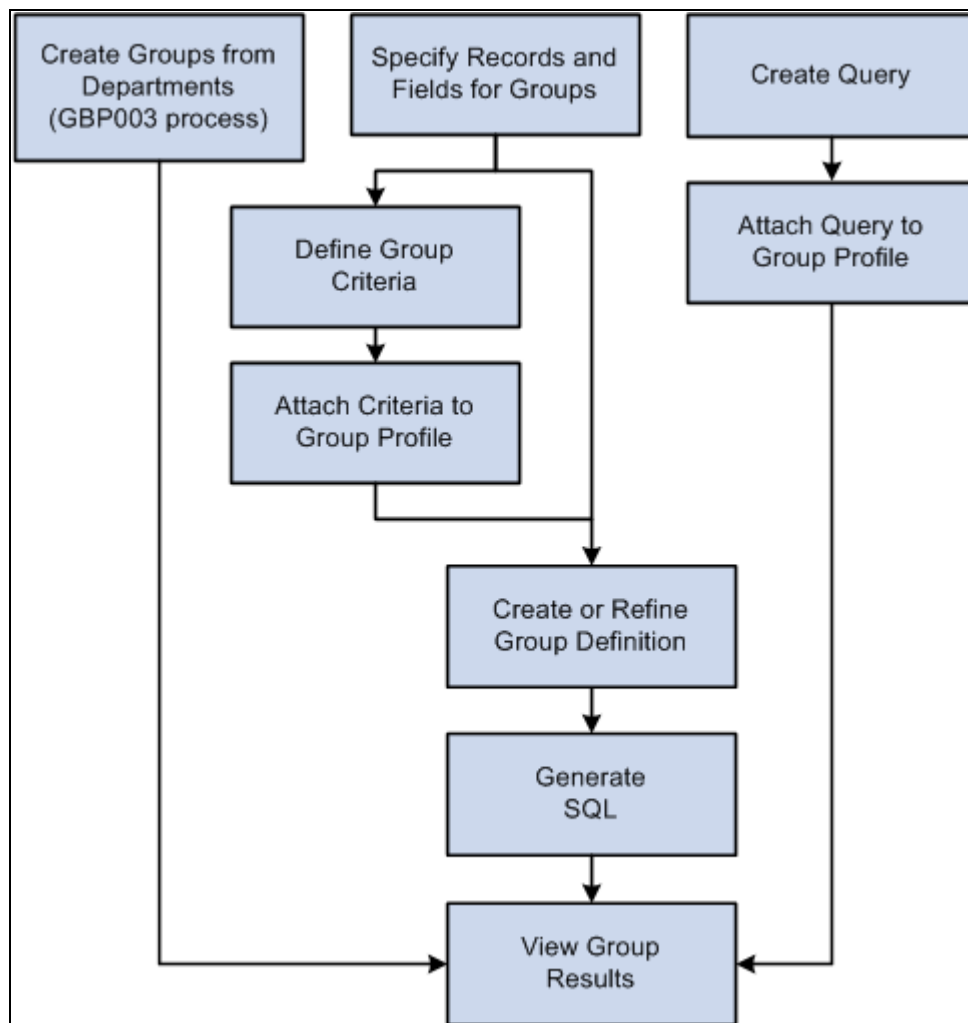
See [Chapter 22, "Setting Up and Working with Group Definitions," Specifying Records, Fields, and Field Values for a Group, page 552.](#)

Note. Only the fields that you select on the Group Build Records and Fields component are available on the Group Definition page.

Note. Once you have saved a Group ID, you must give yourself access to that group on the Security By Group page (GB_GRP_SEC_TBL) or Security By Operator page (GB_GRP_SEC_TBL) or else you will be unable to access the group in the Group Build - Group Definition component (GB_GRP_DEFN_TABL).

See [Chapter 22, "Setting Up and Working with Group Definitions," Setting Up Group Security, page 559.](#)

This graphic shows how to define and create groups, as discussed above, as well as the create groups from departments and query methods for creating groups:



Methods for defining group definitions

Understanding Query Definition for Group Build

Use PeopleSoft Query with Group Build to define a group to access many more tables than the thirty-two tables that are available on the Group Criteria page or the Group Definition page.

When you define a query to use in group definitions, the following rules apply:

- The first record you insert into the query must be the Group Build view (GB_QRY_LINK_VW).

The system uses this view to merge SQL statements that are created in the Group Build pages with the SQL statements that are created by PeopleSoft Query.

- You must select the following four fields from the GB_QRY_LINK_VW record:
 - EFFDT
 - EFFSEQ

- You must have at least one criterion for a record that you add in PeopleSoft Query.

You should not add additional criterion from the GB_QRY_LINK_VW record in PeopleSoft Query.

- You can't define fields that are returned by the SQL statement.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You can't use a prompt as an expression.

You can use only Field Name, Expression, Constant, In List, Current Date, and Effective Seq (effective sequence).

- You can't use an expression in the left criteria of the query.
- The maximum length of the expression is 254 characters.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Query

Understanding Automatic Generation of Groups by Department

If your organization has a departmental security structure, creating a parallel structure for groups could involve redoing a great deal of existing work. To minimize duplication of effort, PeopleSoft provides the Group Build Construction SQR process (GBP003) for translating your departmental structure into group format. With this process, you create new groups that correspond to your existing company, setID, and department structure.

For example:

- Department 10100 in SetID USA becomes Group USA 10100.
- Department 10200 in SetID USA becomes Group USA 10200.
- Company CCB becomes Group CCB.

Any user who has access to the departments has access to the new groups. For example, a user who has access to department 10200 in SetID USA has access to the new *Group USA 10200*.

Pages Used to Define Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Group Build Records and Fields	GB_REC_FIELD	Set Up HRMS, Common Definitions, Group Build, Group Build Records and Fields, Group Build Records and Fields, Group Build Records and Fields	Select fields for use on the Group Criteria page and Group Definition page.
Group Criteria	GB_GRP_CRIT1_TBL	Set Up HRMS, Common Definitions, Group Build, Group Criteria, Group Criteria	Create a group criteria ID, which is a building block that you combine with other elements to build a more complex group.
Group Definition Comments Sec	GB_GRP_CRIT1_SEC	Click the Comments link on the Group Criteria page.	Enter free-form comments about a Group Criteria definition.
Group Profile	GB_GRP_DEF1_TBL	Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition, Group Profile	Create a group profile. (Optional) Attach an existing group criteria ID or query to a group definition.
Group Definition	GB_GRP_DEF2_TBL	Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition, Group Definition	Specify the records, fields, and field values to define a group or refine a group criteria.
Group Build Definition View	GB_GRP_DEF1_SEC	Click the Comments link on the Group Profile page or the Group Profile or Group Definition page.	View the records, fields, field values, and operators that you've specified for the group definition.
Group Result	GB_GROUP_RES_SEC	Click the Group Visualize icon on the Group Definition page.	View and sort the members of the groups that you've built on the Group Build pages.
Group Build From Co./Dept (group build from company and department)	RUNCTL_GBP003	Set Up HRMS, Common Definitions, Group Build, Group Build From Co./Dept., Group Build From Co./Dept.	Create groups from departments by running the Group Build Construction SQR process (GBP003) to translate your existing company and department structure into group format.

Selecting Fields For Use in Group Criteria and Definitions

Access the Group Build Records and Fields page (Set Up HRMS, Common Definitions, Group Build, Group Build Records and Fields, Group Build Records and Fields).

Group Build Records and Fields

Record:JOBEE Job History

Defaulting Rule OptionsFind | View AllFirst2 of 30Last

*Field Name:DEPTID

*Field Label:Department

Edit Table:DEPT_TBLDepartments

Prerequisite FieldsCustomize | Find |1 of 1Last

	*Required for Prompt	*Field Label	Equivalent Record Field		
1	SETID	Set ID		+	-

Group Build Records and Fields page

For the record you selected on the search page, choose the fields you want to make available for creating group criteria on the Group Criteria page and on the Group Definition page. The system makes only those fields that you select here available on the Group Criteria page.

Defaulting Rule Options

- Field Name and Field Label**

Select the field name that you want to have available for use as group criteria. After you select a field name, its description appears in Field Label; you can change this description.
- Edit Table**

Select the field's edit table—the table from which the field is prompted.

Prerequisite Fields

- Required for Prompt and Field Label**

Select the field that prompts for the group criteria fields, if required.

For example, if the defaulting rules field is Department, select SETID because before you can select a department, you need to select the department's setID. The appropriate Field Label and Equivalent Record Field appear when you select the Required for Prompt field.
- Equivalent Record Field**

Select the Required for Prompt field's equivalent. For example, the department's equivalent of SETID is SETID_DEPT

Sometimes the equivalent field is the same as the Required for Prompt field or there is no equivalent field. If there is no equivalent field, leave this field blank.

Defining a Group Criteria

Access the Group Criteria page (Set Up HRMS, Common Definitions, Group Build, Group Criteria).

Group Criteria

Group Criteria ID:

KF001

*Description:

Company and Employee Category

Short Description:

Cpy & Catg

[Comments](#)

Criteria Definition

Customize | Find | View 3 | | First 1-4 of 4 Last

	Boolean	*(	*Record	*Field Name	*Field Label	Edit Table	*)		
1			JOB	COMPANY	Company	COMPANY_TBL			
2	AND		JOB	EMPL_STATUS	Employee Status				
3	AND		JOB	LABOR_AGREEMENT	Labor Agreement				
4	AND		JOB	EMPL_CTG	Employee Category				

Group Criteria page

- Boolean**

This field appears only if you add a second row of data to the page. Use it to tell the system how to process the records and fields that you enter on this page. Values are *AND* (the default) and *OR*.
- (**

Create sets or subsets of linked records and field names. Using parentheses helps avoid ambiguity when you create several AND/OR conditions. You can create up to five nesting levels. The system displays a list of values. The default is *none*.
- Record**

Select the record name to include in the group criteria definition. The system displays a list of the records you made available on the Group Build Records and Fields component.

Field Name	Enter the field name to include in the group criteria definition. The system displays a list of the fields you made available on the Group Build Records and Fields component for the record that you selected in the Record field.
Field Label	The system fills in this field when you press TAB to move out of Field Name. You can change the entry.
Edit Table	The system uses edit tables to validate the data that you enter in certain fields. If the field name you entered is linked to an edit table, the system fills in this field when you press TAB to move out of Field Name.
)	Complete a nesting statement that links multiple records and fields together. The system displays a list of values.

Creating a Group Profile

Access the Group Profile page (Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition, Group Profile).

Group Profile

Group Definition

Group ID:KF002

Group Definition

Find | View All | First1 of 1Last

*Effective Date:01/01/1980

Status:Active

Group Criteria ID:KF001

☐ Complex Group - Batch Process

☐ Avail to Manager Self-Service

*Description:Managers in Company KF1

Short Description:KF1 Mgers

Comments

Query Name:

Manager ID:

Approver Empl ID:

Group Profile page

Group ID	Enter or select the group ID on the search page. Note. The group ID <i>NOGROUP</i> is used for Variable Compensation plans without groups. It is a reserved group ID; you cannot create a Group ID of <i>NOGROUP</i> in the Group Build application.

Group Criteria ID	To include an existing group criteria in this group definition, enter the ID here. Otherwise, leave the field blank. You can include only one Group Criteria ID in a group.



If you changed the Group Criteria ID, click the Refresh button to repopulate the Group Definition page with new values.

Complex Group - Batch Process

Select if you want to select batch processing for complex groups that take a long time to build online. Batch processing can take place at off-peak times when you don't need your system for other purposes.

PeopleSoft Process Scheduler handles batch processes, so be sure that your process scheduler is up when you select this check box. Process Scheduler notifies you when processing is complete. If you need a status on scheduled group execution, see the Group Definition - Group Results page.

Note. Clicking the Launch Count button on the Group definition page sends the group to the process scheduler to be generated. If you have a complex group that you have already generated, clicking Launch Count retrieves the number of rows in the group.

Avail to Manager Self-Service

Select this check box if you plan to use Group ID as an access type for any manager self-service transaction.

Comments

Click this link to enter free-form comments on the Group Build Definition View page and to view the where clauses defined on the Group Definition page.

Query Name

To include an existing query in this group definition, enter the query ID here. Otherwise, leave the field blank.

Warning! When you access the list of options in this field, all existing queries that include the record GB_QRY_LINK_VW appear. However, the Group Build process works only with queries that have the fields EMPLID, EMPL_RCD, EFFDT, and EFFSEQ. If you select a query that does not contain those fields, the system will not display the Launch Count and Group Visualize buttons on the Group Definition page.

See [Chapter 22, "Setting Up and Working with Group Definitions," Understanding Query Definition for Group Build, page 545.](#)

Manager ID

Designate the group's manager, if applicable. For example, if the group you're defining consists of all employees in department 10200, enter the department manager's ID here. You can also use this field to designate the leader of a project team.

Variable Compensation uses the group manager ID to determine who can access the Award Allocation page when a plan is managed with groups.

If you selected the Avail to Manager Self-Service check box, Manager ID is required.

Approver Empl ID
(approver employee ID)

If you're planning to use this group in the Variable Compensation Administration by Groups business process, enter the employee ID of the person who approves awards for this group. The system displays a list of values.

If you selected the Avail to Manager Self-Service check box and are using workflow with self-service transactions, Approver EmplID is required.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Query

Specifying Records, Fields, and Field Values for a Group

Access the Group Definition page (Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition, Group Definition).

The screenshot shows the 'Group Definition' page in PeopleSoft. The 'Group ID' is 'KF002'. The 'Effective Date' is '01/01/1980' and the 'Status' is 'Active'. The 'Count Result' is '0'. The 'Where Clause' section contains a table with the following data:

*Group Left Parenthesis: Record	Field Name	Label	Operator: / Edit Table:	*Group Right Parenthesis
JOB	COMPANY	Company	Equal	COMPANY_TBL

Below the 'Where Clause' section is the 'Values' section, which contains a table with the following data:

Value
KF1

Group Definition page

Group Definition

You can use this page in combination with a group criteria entered on the Group Profile page or you can build a group entirely on this page. You can use this page in any of the following ways:

- If you entered a Group Criteria ID on the Group Profile page.

The system populates the Group Definition page with the record and field names from the Group Criteria page. You can't change the record and field names on this page. To finish defining the group, complete the parameters by entering the appropriate field values for each field name in the Criteria Definition group box on the Group Criteria page. You can add more records, field names, and field values to the definition.

- If you aren't using a Group Criteria ID.

Define the group entirely on this page. Enter all the records, field names, and field values that you'll use to build the group.

- If you entered a query on the Group Profile page.

You can't refine a group that is based on a query.

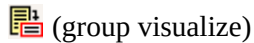


After you save the page, click the Launch Count icon to compute how many members are in the group. If you selected the Complex Group - Batch Process check box on the Group Definition - Group Profile page, clicking Count sends the group to PeopleSoft Process Scheduler to be generated.

If this is a complex group that you have already generated, clicking Count retrieves the number of rows in the group.

Count Result

When you click the Launch Count button, the system displays the number of members in the group. If you used effective-dated records in the group definition, the group might include more than one row of data per employee. Each data row counts as one item in the Count Result.



Click the Group Visualize button to build the group and to access the Group Result page, where you get a list of all group members.

Comments

Click this link to access the Group Build Definition View page where you can enter comments or view the where clause that you defined on the Group Definition page.

Where Clause

Record

Enter the name of the record that you want to use to define the group. The system displays a list of valid record names. If this field is populated by a Group Criteria definition, you can't change the entry.

Field Name

Enter the name of a field to use to define the group. The system displays a list of values for the record that you entered in the Record field. If you entered a group criteria ID on the Group Profile page, the system populates this field and you can't change the entry.

Label

The system populates this field when you move out of the field.

Operator

Define the field values to include in or exclude from the group. See the following Valid Operators table.

Note. (JPN) If you define groups for use in Japanese processes such as Seniority Pay or Salary Increase, we recommend that you do not set the Operator for Job – Effective Date to *Current*. If you select *Current*, you may not get the results you want when you run processes that are backdated. Provided Effective Date is not set to *Current* here, you can run processes to extract other than current data by using the As of Date on the process page.

Edit Table

The system uses edit tables to validate the data that you entered in certain fields. If the Field Name that you entered is linked to an edit table, the system populates this field.

Note. If the Field Name that you entered is keyed to other fields, the system displays the other fields that you must enter to finish defining the field. For example, if you want to build a group based on a particular Salary Step, you must also specify the SetID, Salary Plan and Salary Grade.

Value

Select a field value from the list.

Valid Operators

<i>Operator</i>	<i>Description</i>
<	Less than.
<=	Less than or equal to.
<>	Less than or greater than.
=	Equal to.
>	Greater than.
>=	Greater than or equal to.
Between	
Current	
EFFDT<	Effective date is less than.
EFFDT<=	Effective date is less than or equal to.
EFFDT>	Effective date is greater than.
EFFDT >=	Effective date is greater than or equal to.
In List	

<i>Operator</i>	<i>Description</i>
Is Null	Field value equals 0.
Like	
Max	Maximum.
Min	Minimum.
Not Btw	Not between.
Not Equal	
Not In	Not In List
Not Like	
Not Null	Field value does not equal 0.

Defining Groups with Effective-Dated Data

Several records that you use to define a group are effective-dated:

- Job
- Effective-Dated Personal Data
- Time and Labor Employment Data
- Compensation

The system stores both current and historical data for these records, so you can build groups with them in two ways:

- Using current data.

For example, selecting only an employee's current job and leaving out the previous jobs. The system adds the condition *Current* to the record's effective date.

- Using history data.

For example, including all the jobs that the employee has held in your organization. The group can include multiple rows of data for one employee. If you don't place any conditions on the effective date when you define the group, the system pulls all the historical data as of the current system date.

If you create a group definition that includes two effective-dated records, you can link the two records by effective date. The following table shows how to link two effective-dated fields.

<i>Operator</i>	<i>Description</i>
Effdt<=	Effective date is less than or equal to.
Effdt>=	Effective date is greater than or equal to.
Effdt<	Effective date is less than.
Effdt>	Effective date is greater than.

Viewing Records, Fields, and Field Values for a Group

Access the Group Build Definition View page (click the Comments link on the Group Profile page or the Group Definition page).

Group Build Definition View

Comment

Where Clause

Customize | Find | View All | First 1-4 of 4 Last

	(	Record (Table) Name	Field Name	Operator	Values List	)
		JOB	COMPANY	=	KF1	
AND		JOB	HR_STATUS	=	A	
AND		JOB	LABOR_AGREEMENT	=	(FRA)KF01	
AND		JOB	EMPL_CTG	=	(FRA)(KF01)CAD	

Group Build Definition View page

Where Clause

View the where clause as defined on the Group Definition page.

Viewing and Sorting Group Members

Access the Group Result page (click the Group Visualize button on the Group Definition page).

Group Result

Search On Name: ID:

Sort group by
☒ Empl ID ☐ Name

1 to 25 of 95

Empl ID	Name	Empl Record	Job Code	Job EffDt	Job EffSeq	Description
KF0003	Serge Granjean	0	420090	02/11/1992	0	Director-Operations
KF0003	Serge Granjean	0	420090	01/01/1995	0	Director-Operations
KF0003	Serge Granjean	0	420090	01/01/2000	0	Director-Operations
KF0003	Serge Granjean	0	420090	01/01/2002	0	Director-Operations

Group Result page

Using Group Member Chunking Controls

Because the number of group members could be very large, the system loads members into this page in chunks. You can determine the number of rows in a chunk in the Maximum Number of Rows for Scrolling field on the Installation Table. You manage the display of chunks using filters and navigator buttons.

Filters enable you to enter search criteria for identifying a chunk of members. You can enter information into one or more of the filter fields to narrow your search.

Important! Group Build automatically joins the JOB, COMPENSATION, PERSON, and PER_ORG_ASGN tables. To compare the group results from this page with the results of a query that you launched from your SQL editor, add the joins to those three records in your SQL editor to ensure that the results are comparable.

When you click the count button, Group Build Definition gives the system date as parameter. For example, the Group Build Definition adds the condition JOB.EFFDT <= Given Date is added in the generated SQL, even if you did not define any dates criteria in the Group Build Definition.

Use the following filters and navigator buttons to move from one chunk of members to another:

Search on Name

Enter one or more letters in this filter field to instruct the system to populate the page with employees whose last names begin with the letters that you entered.

You can use the wild card % to help select a record. For example, to search for all employees named John enter %John.

ID (employee ID)	Entering one or more numbers in this filter field instructs the system to populate the page with employees whose employee IDs begin with the numbers that you entered.
Sort group by	Select whether you want the members to appear in order by EmplID (employee ID) or Name. Note. (JPN) The Sort group by feature is disabled when Japanese Kanji character sets are used in a Non-Unicode database with Japanese as the base language and login language.
	Click the Refresh Search Fields? button to clear all previously entered search criteria from the filter fields.
Search	Click the Search button to display the results of a new search. To the left of the Sort group by group box, the system displays which rows are visible compared to the total number of rows. For example, <i>1 to 4 of 4</i> means that rows 1 through 4 are displayed out of a total of 4 rows. Note. After you click Search, the button disappears from the page until you click the Refresh Search Fields? icon.

See Also

Chapter 22, "Setting Up and Working with Group Definitions," page 541

Creating Groups From Departments

Access the Group Build from Co. & Dept. page.

Run the Group Build Construction SQR process (GBP003) to translate your departmental structure into group format.

When the process is complete, you can use the Group Build pages to view the groups and verify that they were generated correctly.

See Also

Chapter 22, "Setting Up and Working with Group Definitions," Understanding Automatic Generation of Groups by Department, page 546

Setting Up Group Security

To set up group security, use the Group Security Default component (GB_GRP_DEFN_TABLE), Security By Group component (GB_GRP_SEC_TABLE), and Security By Operator component (GB_OPR_SEC_TABLE).

This section provides an overview of group security and discusses how to:

- Set up default component access.
- Set up security by group.
- Set up security by operator.

Understanding Group Security

Because you can group people together in any manner that suits your needs, including across companies or departments, groups have their own security structure that is separate from, and overrides, data permission security. For example, a user who does not normally have access to department 10100, but who has access to a group that includes people in department 10100, can see all group members, even those who belong to that department. This makes security factors an important consideration when you set up groups.

Note. User profiles must have an associated person in order to be given security access to groups (the system will not list user IDs that don't have a person associated with them). This ensures that the security is assigned to a person and the activities involving the group can be tracked by the person. Assign people to user profiles on the User Profiles component in PeopleTools security.

Pages Used to Set Up Group Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Group Security Default	GB_GROUP_DFT_TBL	Set Up HRMS, Common Definitions, Group Build, Group Security Default, Group Security Default	Set up default component access. Specify which components in your system can use or refer to groups that are created in the Group Build component.
Security By Group	GB_GRP_SEC_TBL	Set Up HRMS, Common Definitions, Group Build, Security by Group, Security by Group	Set up security by group. Specify the users who have security access to the selected group ID and the components that the user can access for the group.

Page Name	Definition Name	Navigation	Usage
Security By Operator	GB_OPR_SEC_TBL	Set Up HRMS, Common Definitions, Group Build, Security By Operator, Security By Operator	Set up security by user. Specify the groups that the selected user can access and the components that the user can access for the group.

Setting Up Default Component Access

Access the Group Security Default page (Set Up HRMS, Common Definitions, Group Build, Group Security Default, Group Security Default).

Group Security Default

Default Component
Find First 1-168 of 168 Last

Component Name			
BUDGET_COMPARE_INQ		☒ System Data	
COMP_RATECD_TBL		☒ System Data	
CO_DPK_CATEGORY		☒ System Data	
CO_DPK_SUPPLIER		☒ System Data	
CO_ESV_EXTRACT		☒ System Data	
CO_ESV_SUPPLIER		☒ System Data	
CREATE_USERS		☒ System Data	
EE_NO_CURR_RVW_INQ		☒ System Data	
EE_REVIEW_BY_GROUP		☒ System Data	
EE_REVW_RESLT_INQ		☒ System Data	
EP_DESIREDDIST		☒ System Data	
EP_DISTRIB_SUM		☒ System Data	
EP_LATE_APPR		☒ System Data	

Group Security Default page

Component Name	The system populates these fields with a list of the standard PeopleSoft Human Resources components that refer to groups. Components can refer to groups in one of two ways: • The page contains a field that prompts the user to supply a group ID. • The page displays a list of people who belong to a particular group. When you define group security for a particular group or user, you can import this default list into the Security By Group and Security By Operator pages. Then you can selectively delete components to make them unavailable to that group or user. To keep a particular component from appearing on the Security By Group or Security By Operator page, delete its name from the list.
System Data	View whether a component is a standard component that is delivered by PeopleSoft as system data or a modified component that is created for your installation. This check box is selected if the system supplies the data and deselected if the component is modified. You can't change this field.

Setting Up Security By Group

Access the Security By Group page (Set Up HRMS, Common Definitions, Group Build, Security by Group, Security by Group).

Security by Group

Group ID: EI003 EI003

Group SecurityFind | View All First1 of 1Last

*Effective Date: 01/01/1990

User SecurityFind | View All First1 of 1Last

*User ID: HHR_VC05

KC0013 Margaret Tucker

*Status: Active

Component NameFind | View All First1-3 of 21Last

GB_GRP_DEFN_TABLEDefault

RC_VC_CALCWRD_G

RC_VC_CALCWRD_P

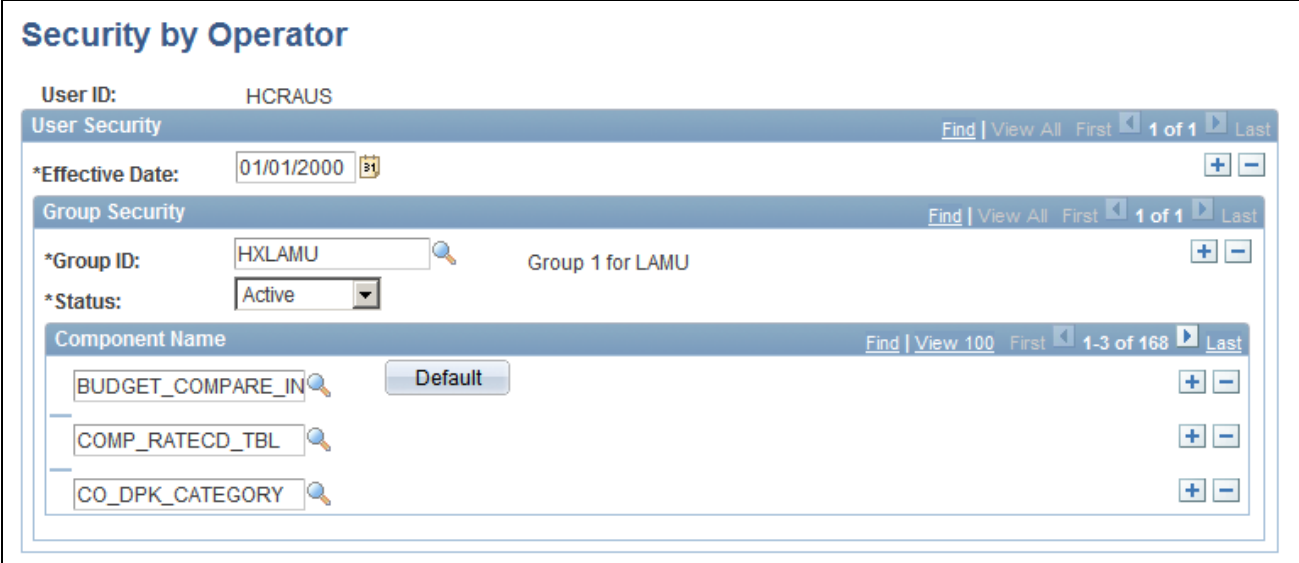
Security By Group page

Effective Date	The date on which the security configuration takes effect. The default is to today's date. Change the date to grant security access as of a different date.

User ID	Select the ID of a user whose group access you want to set up or change.
 (get employee ID)	If you know a person's ID but not the matching user ID, click the Get Employee ID icon to search for the person's user ID. The system displays the Search Operator ID box. Enter the ID and click OK to add the person's user ID to the user list, if it isn't already on the list. If you don't know the person's ID, click the Look up EmplID icon to search for it. The system displays a Look up EmplID page that you can use to search for the ID you want.
Status	Select <i>Active</i> to grant the user access to the group or <i>Inactive</i> to remove the user's access.
Component Name	Select the components that you want to include in the user's security access for this group. Valid values are the default components listed on the Group Security by Default page.
Default	Click this button to assign this user access to the current group from any default component listed on the Group Security Default page. The system displays the default components. You can delete any components for which you do not want to grant security access to this user for this group. See Chapter 22, "Setting Up and Working with Group Definitions," Setting Up Default Component Access, page 560.

Setting Up Security By User

Access the Security By Operator page (Set Up HRMS, Common Definitions, Group Build, Security By Operator, Security By Operator).



Security by Operator

User ID: HCRAUS

User Security Find | View All | First 1 of 1 Last

*Effective Date: 01/01/2000 31 + -

Group Security Find | View All | First 1 of 1 Last

*Group ID: HXLAMU Group 1 for LAMU + -

*Status: Active + -

Component Name Find | View 100 | First 1-3 of 168 Last

BUDGET_COMPARE_IN + -

COMP_RATECD_TBL + -

CO_DPK_CATEGORY + -

Default

Security By Operator page

Effective Date	The date that the security configuration takes effect. The default is today's date. To grant security access as of a different date, change the date.
Group ID	Enter the ID of the group to which you want to control this user's access.
Status	Select <i>Active</i> to grant the user access to the group or <i>Inactive</i> to remove the user's access.
Component Name	Select the components that you want to include in the user's security access for this group. Valid values are the default components listed on the Group Security by Default page.
Default	Click this button to assign this user access to the specified group from any default component listed on the Group Security Default page. The system displays the default components. You can delete any components for which you do not want to grant security access to this user for this group. <u>See Chapter 22, "Setting Up and Working with Group Definitions," Setting Up Default Component Access, page 560.</u>

Refining Groups in PeopleSoft Applications

After you create the group definition, you refine group members at the application level.

You can define a group as of:

- A point in time.

Some processes select only group members as of an effective date specific to the process. In this case, if the group is created with all job historical rows, the system selects only the data as of the effective date.

- A period of time.

Some processes select group members who have job data between a from and a through date.

See Also

Appendix A, "Group Build Implementation for Developers," Building Applications or Batch Programs that Include Group Build Functions, page 995

Viewing Group Results and Reports

This section provides an overview of group membership and discusses how to view complex group results.

Understanding Group Membership

When you define a group through the Group Definition component, you don't specify any time limits on group membership, so some groups may have very long lists of members. To help manage these potentially unwieldy groups, PeopleSoft provides an inquiry page and reports that you can use to view group members.

See Also

[Chapter 22, "Setting Up and Working with Group Definitions," Viewing Group Results and Reports, page 563](#)

Common Elements

Group ID	Enter the ID of the group whose members you want to view.
As Of Date	The report lists the members who belong to the group as of the current date, or as of the date you specify in the Refinement Date field.
Refinement Date	If the group definition includes effective-dated records, enter the date for which you want the records run. For instance, you might want to run a group with an effective date of 1/1/1990, but run the effective-dated rows in the group as of 2/15/1998. In that case, you would select a Group As of Date of 1/1/1990 and a Refinement Date of 2/15/1998. If you leave this field blank, the system will run the group as of the current date.

Pages Used to View Group Results and Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Complex Group Results Summary	RSLT_SMRY_PNL	Set Up HRMS, Common Definitions, Group Build, Complex Group Results Summary, Complex Group Results Summary	View the status of the complex groups that you created in the Group Definition component. You must already have run the background process to create the group.
Group Overlapping	RUNCTL_GBP001	Set Up HRMS, Common Definitions, Group Build, Group Overlapping, Group Overlapping	Run the Group Member Overlapping report (GBP001). This report lists individuals who belong to multiple groups.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Group Membership	RUNCTL_GBP002	Set Up HRMS, Common Definitions, Group Build, Group Membership, Group Membership	Run the Group Membership report (GBP002). This report lists the members of selected groups.

Viewing Complex Group Results

Access the Complex Group Results Summary page (Set Up HRMS, Common Definitions, Group Build, Complex Group Results Summary, Complex Group Results Summary).

You can designate any group as a complex group by selecting the Complex Group - Batch Process check box on the Group Definition - Group Profile page. The system creates complex groups by background process and notifies you when processing is complete.

Purging Group Results

This section provides an overview of the group results and discusses how to:

- Purge usable results.
- Purge unusable results.

Understanding Group Results

Each time you generate and execute a group, the system stores the results in the Group Result Table. The next time you execute the same group, the system checks to see if the group's definition and date parameters have changed since the last time you ran the group. If they have, the system deletes the old results from the Group Results Table and saves the new results.

Pages Used to Purge Results

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Group Results Purge	RUNCTL_GBP004	Set Up HRMS, Common Definitions, Group Build, Group Results Purge, Group Results Purge	Delete (purge) the results of a previous version of a group from the Group Results Table.
Unusable Group Results Purge	RUNCTL_GBP005	Set Up HRMS, Common Definitions, Group Build, Unusable Group Results Purge, Unusable Group Results Purge	Delete the results from all of your groups from the Group Result Table. You must have saved the group you want to purge before using this page.

Purging Usable Results

Access the Group Results Purge page (Set Up HRMS, Common Definitions, Group Build, Group Results Purge, Group Results Purge).

The Group Results Purge process deletes *usable groups* —groups with results in the Group Results Table that are still in sync with the current group definition and can potentially be retrieved by the system.

Group Results Purge page

Group ID

Enter the ID of a group whose results you want to purge. The system deletes the results from the Group Build results table GB_GRP_RES_TBL.

Purging Unusable Results

Access the Unusable Group Results Purge page (Set Up HRMS, Common Definitions, Group Build, Unusable Group Results Purge, Unusable Group Results Purge).

The Unusable Group Results Purge process deals with *unusable groups*—groups that were generated when the group definition was different from what it is now, and the results that are stored on the Group Results Table no longer match the group definition. Group results become unusable when any of the following items change:

- The developer's query definition.
- The Group Results Table, where the group results are stored.
- The group definition.
- The user's query definition.

Chapter 23

Administering the HRMS System

This chapter discusses how to:

- Analyze portal navigation.
- Restrict the deletion of IDs.
- Refresh and audit Human Resources data.

Analyzing Portal Navigation

To analyze portal navigation, use the Portal Analysis component (RUNCTL_PORTAL).

This section discusses how to analyze HRMS portal navigation.

Page Used to Analyze Portal Navigation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Portal Analysis	RUNCTL_PORTAL	Set Up HRMS, System Administration, Utilities, Portal Analysis, Portal Analysis	Analyze the portal navigation structure for users, roles or permission lists.

Analyzing Portal Navigation

Access the Portal Analysis page (Set Up HRMS, System Administration, Utilities, Portal Analysis, Portal Analysis).

Portal Analysis

Run Control ID: PS
[Report Manager](#)
[Process Monitor](#)

Process Request Parameters

File Name:

Portal Name:

Content Provider Name:

Process Result:

Portal Object Name

Portal Object Name:

Display Levels:

☐ Show Object Names
☐ Show Menu.Component.Market
☐ Suppress Hidden Objects

Apply Security Based On

☒ UserId
☐ Role
☐ Permission List

User ID:

Portal Analysis page

- File Name** Enter the name of the file you want the process to create and populate with the portal analysis. The process will distribute the file to the reporting repository.
- Portal Name** Enter the name of the portal you want to analyze.
- Content Provider Name** Select *HRMS* in the Content Provider Namefield to analyze HRMS portal navigation.
- Process Result** Select the processing result from the following options:
- *Portal/Menu Path*
The result creates a straight list of the portal and menu paths. This result does not use the other values on the page so the system hides them when you select this option.
 - *Portal Navigation Hardcopy*
This result gives you more options and can create a more hierarchical view of the navigation.
- Portal Object Name** Select the portal object name.
- Display Levels** Enter the number of portal levels to print. Leave empty to print all the levels.

Show Object Names	Select to display the object names of the CREFs or folders. If you leave this check box deselected, the process will just display the labels.
Show Menu.Component.Market	Select to display the CREFs menu, component, and market information.
Suppress Hidden Objects	Select to keep the process from including hidden objects. If you leave this check box deselected, the system identifies hidden objects with the following text preceding the object name: *hidden*.

Apply Security Based On

Select to analyze the portal navigation for the security access assigned to a *UserId*, *Role*, or *Permission List*. Select the userID, role, or permission list to use.

Restricting the Deletion of IDs

To restrict the deletion of IDs, use the ID Delete Control component (ID_DEL_PRVNT_TABLE).

This section provides an overview of setting up ID delete control and discusses how to prevent the deletion of IDs from critical records.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information," Changing and Deleting IDs

Understanding ID Delete Control

The ID Delete Control feature enables you to define priority data records to prevent users from deleting IDs with data on which others at your organization might rely. With priority data in place, the system will not permit users to delete an ID for which that data exists. A system administrator, or other user with proper security, can review the key data and then, if required, delete the ID.

The PeopleSoft system delivers predefined ID delete control priority tables and fields for individual and organization IDs. Corresponding messages are preset to appear when you try to delete an ID with data in any of the associated control records and fields.

Note. You should not modify the predefined ID delete controls. You can, however, define additional priority data by adding other records and fields to control the deletion of IDs.

Page Used to Restrict the Deletion of IDs

Page Name	Definition Name	Navigation	Usage
ID Delete Control	ID_DEL_PRVNT_TABLE	Set Up HRMS, System Administration, Database Processes, ID Delete Control, ID Delete Control	Enter records from which an ID should not be removed during an ID deletion or change. This ensures that the information is stored for historical purposes.

Preventing the Deletion of IDs from Critical Records

Access the ID Delete Control page (Set Up HRMS, System Administration, Database Processes, ID Delete Control, ID Delete Control).

ID Delete Control						
Control Record/Fields						
	*Record (Table) Name	*Field Name	*Message Set Number	*Message Number		
1	ACCOUNT_SF	EMPLID	14000	40	+	-
2	GP_PYE_PRC_STAT	EMPLID	1000	113	+	-
3	PAY_LINE	EMPLID	1000	113	+	-
4	RECRUITERS	RECRUITER_ID	14000	176	+	-
5	RELATIONSHIPS	EMPLID	14000	389	+	-
6	STDNT_CAREER	EMPLID	14000	177	+	-
7	STUDENT_AID	EMPLID	14000	178	+	-

ID Delete Control page

The ID on each of the following control records and the associated messages are delivered predefined as priority data for HRMS:

- GP_PYE_PRC_STAT
- PAY_LINE

Note. The ACCOUNT_SF, RECRUITERS, RELATIONSHIPS, STDNT_CAREER, and STUDENT_AID priority data are used in Campus Solutions.

You should not delete any of the rows of predefined control records. Keep these as your base ID delete control records for individual IDs and define additional priority data as necessary.

To define an additional control record, or to add an additional field from the same record, click the Plus button at the level where you want to add it. The system enters a new row and renumbers the sequence of control records. Select the record name, field name, and message data. The new row is not added until you click Save.

Record (Table) Name	Displays the name of the record that contains the priority data field.
Field Name	Displays the name of the field that, when data exists in it, prevents the deletion of the ID.
Message Set Number	Enter the set number of the message to display when data exists in the priority data field.
Message Number	Enter the number of the message to display when data exists in the priority data field.

Warning! If you need to create user-configurable messages, create them in Message Sets 20,000-29,000 to prevent the system from overwriting them.

Note. The short description for many message numbers is the same. Review the detailed description associated with each message number in the PeopleTools Message Catalog to determine which message number displays the desired message regarding the specific field.

Refreshing and Auditing Human Resources Data

To refresh and audit Human Resources data, use the Refresh EMPLOYEES Table component (RUN_PER099), PERSONAL_DATA Settings component (PERSON_DT_SETUP), Refresh Personal Data component (RUN_PERS_REFRESH), Update Personal Data-Future component (RUN_PERSDATA_FUT), Refresh Name Display Values component (NAME_DISPLAY_RC), and the Core HR Data Integrity Audit component (RUN_PER900).

This section discusses how to:

- Select refresh options for the Personal Data component.
- Refresh name display values.
- Audit Human Resources data for integrity.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information," Refreshing Tables to Facilitate Reporting

Pages Used to Refresh and Audit Human Resources Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Refresh EMPLOYEES Table	RUNCTL_ASOF_DATE	Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table, Refresh EMPLOYEES Table	Refresh the PS_EMPLOYEES snapshot table as of the selected date.
PERSONAL_DATA Settings	PERSON_DT_SETUP	Set Up HMRS, System Administration, Database Processes, PERSONAL_DATA Settings, PERSONAL_DATA Settings	Select the data that you want to include in the refresh snapshot of the Personal Data component (PERSONAL_DATA). The fewer options you select, the faster the system can refresh the table. You must make these selections when you install HRMS. PeopleSoft only uses EmplID and Name data. Select the options you need to meet your ad hoc reporting and query needs.
Refresh Personal Data	PRCSRUNCNTL	Set Up HMRS, System Administration, Database Processes, Refresh Personal Data, Refresh Personal Data	Refresh the Personal Data component. The Refresh Personal Data component (PERS_REFRESH) loads the data types that you selected on the PERSONAL_DATA Settings page. Note. This process should only be run when the PERSONAL_DATA settings are changed. This program will lock the PERSONAL_DATA table for updates during processing.

Page Name	Definition Name	Navigation	Usage
Update Personal Data-Future	PRCSRUNCNTL	Set Up HMRS, System Administration, Database Processes, Update Personal Data-Future, Update Personal Data-Future	Run this process shortly after midnight to update the Personal Data component. The process will update data with future dated information that has become current. The Update Personal Data-Future process runs the HR_PERSDATA application engine program.
Refresh Name Display Values	NAME_DISPLAY_RC	Set Up HRMS, System Administration, Database Processes, Refresh Name Display Values, Refresh Name Display Values	Refresh all records with the NAME_DISPLAY and NAME_FORMAL fields to reflect changes made to the PeopleCode definition of those fields. You can choose to update records with all name format types or just with one name format type.
HR Core Data Integrity Audit	HRAUDIT	Set Up HRMS, System Administration, Database Processes, Core HR Data Integrity Audit, HR Core Data Integrity Audit	Initiate the Core Human Resources Data Integrity Audit.

Selecting Refresh Options for the Personal Data Component

Access the PERSONAL_DATA Settings page (Set Up HMRS, System Administration, Database Processes, PERSONAL_DATA Settings, PERSONAL_DATA Settings).

PERSONAL_DATA Settings

Address Type:

Home

Other Address Type:

Mailing

☒ Include Installed Countries

☒ Include Primary Phone Data

☒ Include Smoker Data

☒ Include Campus Solutions Data

☒ Include US Federal Data

PERSONAL_DATA Settings page

Address Type	Select which address type to refresh.
Other Address Type	Select a secondary address type to refresh.
Include Installed Countries	Select to include the information in the country-specific group boxes for those countries that you've installed on the Installation Table - Country Specific page.
Include Primary Phone Data	Select to include the information in the PERSONAL_PHONE record.
Include Smoker Data	Select to include the information in the PERS_SMOKER record.
Include Campus Solutions Data	Select to include the information in the PERSON_SA record.
Include US Federal Data	Select to include the information in the PERS_DATA_USF record.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources," Adding a Person

Refreshing Name Display Values

Access the Refresh Name Display Values page (Set Up HRMS, System Administration, Database Processes, Refresh Name Display Values, Refresh Name Display Values).

Refresh Name Display Values

Run Control ID: retro [Report Manager](#) [Process Monitor](#) [Run](#)

This process will update all records that have the NAME_DISPLAY and NAME_FORMAL fields to reflect changes made to the definition of those fields. The definition is done in peoplecode - NAMEGBL_SBR.COUNTRY_NM_FORMAT.SavePreChange in the Format_display_name function. You can choose to update records with all name format types or just with one name format type.

☒ Update All Name Formats?

Records to Update

- ☒ Update NAMES record
- ☒ Update Dependents
- ☒ Update HS Non-Employees
- ☒ Update French Public Sector
- ☒ Update US Federal Names

Name Display Refresh page

Select which records whose name fields format you want to update.

Auditing Human Resources Data for Integrity

Access the HR Core Data Integrity Audit page (Set Up HRMS, System Administration, Database Processes, Core HR Data Integrity Audit, HR Core Data Integrity Audit).

Core HR Data Integrity Audit

Run Control ID: audit [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Core HR Data Integrity Audits

☒ Audit PERS_DATA_EFFDT data	☒ Audit NAME data
☒ Audit EMPLOYMENT data	☒ Audit Home Address data
☒ Audit JOB data	☒ Audit Disability data
☒ Audit JOB_JR data	☒ Audit Diversity data

HR Core Data Integrity Audit page

Select the HR tables you want to audit for integrity.

Using the Tables Accessed and Updated Report

This section describes the Tables Accessed and Updated report.

Understanding the Tables Accessed and Updated Reporting Utility

The Tables Accessed and Updated report:

- Analyzes the following PeopleSoft applications:
 - SQR reports.
 - COBOL programs.
 - Application Engine programs.
 - PS Query views.
- Reports the record names referenced by the SQL statements within the applications.
- Reports the way in which those records were accessed (for example, Select, Update, or Delete.)

Use this information to:

- Understand a program's functionality and how it manages your data.
- Assess the impact of proposed customizations.
- Determine the underlying database privileges require to execute a program.
- Identify every batch process that uses or alters a specific record.

Troubleshooting the Tables Accessed and Updated Report

Because of the flexibility of the programming environments and the rich set of meta-SQL available in PeopleTools, the table list created by the Tables Accessed and Updated report may sometimes be incomplete. The list will be incomplete when:

- The SQR allows the use of dynamic substitution tables.

Since the Tables Accessed and Updated report can't know the full set of tables that might be substituted, it reports the condition when it encounters this kind of SQR.

- The SQR incorporates the construction of SQL clauses within string variables that can then be used in SQL statements and resolved by the SQR at runtime.

The Tables Accessed and Updated report can't detect this style of coding, however there aren't many table references found within these kinds of clauses.

- The SQR references libraries through syntax that includes (#INCLUDE) SQR files.

If an included module is a very generic library with a large number of general-purpose routines in it, the analysis may overstate the number of tables referenced.

- The COBOL programs reference libraries through syntax that calls (CALL ... USING) routines in other modules.

If the module called is a very generic library with a large number of general-purpose routines in it, the analysis may overstate the number of tables referenced.

- The Application Engine program contains the meta-SQL phrase %Execute() with platform-specific procedural logic (such as Microsoft SQL Server "Transact-SQL" or Oracle "SQL-Plus").

The Tables Accessed and Updated report reports such usage as unanalyzed.

- The Application Engine program uses a PeopleCode step.

The Tables Accessed and Updated reports any use of PeopleCode as unanalyzed, whether or not it contains SQL statements.

- The Application Engine program contains forms of meta-SQL that contains dynamic object references.

Since the Tables Accessed and Updated report can't know the full set of tables that might be substituted, it reports the condition when it encounters this kind of meta-SQL.

Page Used to Run the Table Access and Updated Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tables Accessed and Updated	TAU_RUN_CONTROL	Set Up HRMS, System Administration, Utilities, Tables Accessed and Updated, Tables Accessed and Updated	Use the Table Access Utility page to run the Tables Accessed and Updated report.

Running the Tables Accessed and Updated Report

Access the Tables Accessed and Updated page (Set Up HRMS, System Administration, Utilities, Tables Accessed and Updated, Tables Accessed and Updated).

Tables Accessed and Updated

Run Control ID: 2 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

*Application Type: SQR Reports

Product: Human Resources

Applications to Analyze

Application Name: R (Partial name allowed as wildcard)

Or specify a list of Applications ...

[Clear Selected Applications](#) [Refresh Available Applications](#)

Selected Applications

REG002FR	-
REG003FR	-

[+ Add](#) [First](#) [1-2 of 2](#) [Last](#)

Available Applications

☐	

[Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

☐ Include PeopleTools Tables

Location of Tools programs:

Tables Accessed and Updated page

Application Type Select the type of application to analyze in the report. The options are:

- *AppEngine Programs*
- *SQR Reports*
- *COBOL programs*
- *Queries*

Product To restrict the analysis to applications in on product, select it here.

Application Name Enter part or all of the name of the application or applications you want to analyze. Enter a ? to report on all applications in the product.

Note. Depending on the application type, there could be over a thousand applications in a product.

You can run the report using just the information you enter here or you can use this value as search criteria to create a list of applications using the Available Applications and Selected Applications group boxes.

For example, when you select *SQR Reports*, *Human Resources*, and enter *R* in the Application Name field and run the utility, the report will analyze the REG001FR, REG002FR, and REG003FR reports. To refine the search, click the Refresh Available Applications button and select which of the three reports to analyze and add them to the Selected Applications list.

Refresh Available Applications and Available Applications

Click Refresh Available Applications to populate the Available Applications group box with applications that match the search criteria you entered in the Application Name field. Select the applications you want to analyze.

Note. A small number of applications are not associated with normal run control pages (for example, one-time conversion routines or system setup utilities used during installation) and the system will not display them in the Available Applications list. You can enter these applications in the Selected Applications list using the insert button and entering the application's name.

<<Add<<

Click to add the applications you selected in the Available Applications list to the Selected Applications list.

Once you've added items to the Selected Applications list, you can enter new search criteria in the Application Name field and refresh the Available Applications list.

Clear Selected Applications and Selected Applications

The report will analyze all the applications included in the Selected Applications list. You can add or remove applications using the insert and delete icons.

Click the Clear Selected Applications button to deselect the list of applications you've selected for analysis.

Include PeopleTools Tables

Select to include PeopleTools tables in your analysis. PeopleTools tables define all PeopleSoft objects and manage system behavior, and include this such as related language control, currency conversions, and Process Scheduler activity.

Location of Source Code

If you are analyzing COBOL programs, enter the path to the COBOL source code's location on the server.

Note. The system only makes this field available when you select to analyze a COBOL program.

Location of Tools programs

If you are analyzing SQR programs and are *excluding* PeopleTools tables, enter the path to the PeopleTools SQR components' location on the server.

Note. The system only makes this field available when you select to analyze SQR reports.

Testing Component Interfaces Using the Invoke Core CIs Utility

This section describes how to test component interfaces.

Pages Used to Test Component Interfaces Using the Invoke Core CIs Utility

Page Name	Definition Name	Navigation	Usage
Invoke Core CIs	RUNCTL_CCI	Set Up HRMS, System Administration, Utilities, Invoke Core CIs, Invoke Core CIs	Use this page to launch a component interface with sample data to test if it executes in the manner in which you want it to.
Error Log	RUNCTL_CCI2	Set Up HRMS, System Administration, Utilities, Invoke Core CIs, Error Log	After invoking a component interface, use this page to review any errors.

Testing Component Interfaces

Access the Invoke Core CIs page (Set Up HRMS, System Administration, Utilities, Invoke Core CIs, Invoke Core CIs).

The screenshot shows the 'Invoke Core CIs' page. At the top, there are tabs for 'Invoke Core CIs' and 'Error Log'. Below the tabs, the 'User ID' is set to 'PS' and the 'Run Control ID' is also 'PS'. The 'Component Interface Access' section includes a 'Name' field, a 'Mode' dropdown, a 'Write Log File' checkbox, and an 'Invoke CI' button. Below this is the 'Component Interface Access Keys' section, which contains a table with columns 'Sort Order', 'KeyProperty', and 'Value'. The 'Actions to be performed' section has a 'Sequence number' field (set to 0), an 'Action' dropdown (set to 'Update'), a 'Carry Forward' checkbox, and a 'Parent Collection Name' field. Below this are two more sections: 'Collection Keys' and 'Property/Value Pairs', each containing a table with 'Sort Order', 'KeyProperty'/'Property', and 'Value' columns. Each table has a 'Customize' link and navigation controls like 'First', '1 of 1', and 'Last'.

Invoke Core CIs page

Component Interface Access

Name Select the name of the component interface you want to test.

Mode	Select one of the following access modes: • <i>Create</i>: Select to create a new row of data in the component with the key values that you enter in the Component Interface Access Keys grid. • <i>Find</i>: Select to find a list of data rows that match the search criteria you enter in the Component Interface Access Keys grid. • <i>Get</i>: Select to find a single row of data that match the search criteria you enter in the Component Interface Access Keys grid.
Write Log File	Select to create a log file of the component interface test.
Invoke CI	When you've entered all of the necessary information, click to invoke the CI and test it using the information entered on this page.
Sort Order, KeyProperty, and Value	The component interface's key properties are the search keys of the underlying component's search record. Select with key fields to use in the search in the KeyProperty field and enter the value of the field to use in the search in the Value field. If you are searching by more than one key field, indicate the order in which the system should sort the results. If you are testing the CI using the Create action mode, use all the key properties.

Actions to be Performed

Sequence Number	Indicate the order in which the system should execute this action using the component interface.

Action

Select the action to invoke using the CI:

- *Delete*: Select to delete data rows that match the values you enter in this group box.
- *Get*: Select to retrieve data rows that match the values you enter in this group box.
- *Insert*: Select to insert a new data row with the values you enter in this group box.

For example, if the current row is dated November 12, 2005 and you want to enter a row effective January 1, 2004 while still maintaining the November row as the current row, select this option.

- *Invoke Method*:
Select to execute the method for the CI. A method, for instance, can execute PeopleCode. For example, in Salary Planning, the calculation of the salary increase of each employee can be executed on-line or using a batch program. The batch program will execute the method `CI_SALARY_PLAN_GRP.Methods.SalPlanGrp`.
- *Update*: Inserts a new, effective dated row in effective-dated components or updates the data in components that are not effective dated.
- *Update no Insert*: Select to update the existing row of data.

Carry Forward

Select this option to update any rows in the component that are more current than the row you are inserting using the CI.

Parent Collection Name

Select the collection (which corresponds to a record) in which you want to update data.

Sort Order, KeyProperty, and Value

(Collection Keys) Select the key field or fields for the scroll and enter the value of the row upon which you want to execute the action.

Sort Order, Property, and Value

(Property/Values Pairs) Select the fields in the collection and the field values that you want to use in the action.

Chapter 24

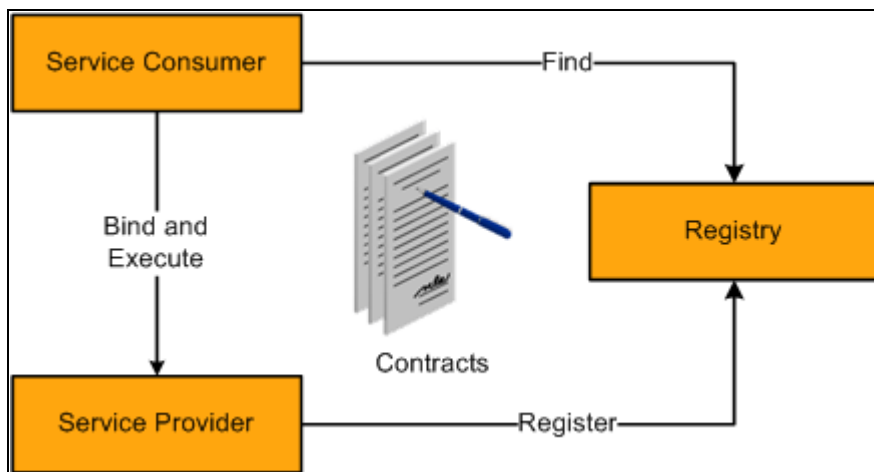
Registering Interfaces

This chapter provides an overview of the HCM interface registry and discusses how to:

- Manage the HCM interface registry.
- Register new interfaces.
- Implement registered interfaces.
- Consume registered interfaces.
- Maintain the registry folder structure.
- Test services.
- View and register transformation maps.
- Map HCM services to Integration Broker.

Understanding the HCM Interface Registry

The HCM interface registry holds all the interface specifications for available services in the Service Oriented Architecture (SOA). It stores contracts from service providers and provides those contracts to interested service consumers. The service provider registers the interface, the consumer locates the interface in the registry and uses the information to bind and execute the contract between the consumer and the provider, as shown in this diagram:



The service consumer finds an interface in the registry and the registry provides the information necessary to bind and execute the service

The service consumer is an application, service, or some other type of software module that requires a service. It is the entity that initiates the location of the service in the registry, binding to the service over a transport, and executing the service function. The service consumer executes the service by sending it a request formatted according to the contract.

The service provider is the service, the network-addressable entity that accepts and executes the requests from consumers. It can be a mainframe system, a component, or some other type of software system that executes the service request. The service provider publishes its contract in the registry for access by service consumers.

To set up and use an interface registry:

1. Set up the interface contract and register the interface using the Registration Wizard (Setup HRMS, System Administration, HCM Registry, Registry Wizard).
2. Implement the interface in the providing application.
3. Set up the consuming application to invoke registered interfaces.

Setting Up Interface Contracts

An interface contract specifies the way a consumer of a service will interact with the provider of the service, including the format of the request and response from the service. The HCM registry is populated with the existing interface contracts within HCM. To add new interfaces to the registry, you must first define the contract between the services.

To define an agreement between services, follow these steps:

1. Determine the interface details (such as signature, exceptions, and warnings).
2. Register the interface under the provider object identifier.
3. Set the interface status to *Active*.

Note. Register interfaces using the HCM registry's Registration Wizard.

Interfaces fall into one of the following categories:

- Services

- Synchronous request/response (services)

Services interfaces are procedural invocations and can be local and remote.

- Asynchronous publish/subscribe (events)

Events can be notifications (outbound) or consumption (inbound) and are based on messaging and integration points.

- sqlViews (views)

Views are read only and are SQL-based.

- Types

Types represent the complex data types used in service invocations. The following types are supported for service invocations in API:

- Primitives (native PeopleCode data types), such as string, date, number, boolean, hexbinary, and arrays.
 - Complex types, as defined in the registry or arrays of any complex type.

Note. While you can use all primitive types in service invocations natively, all complex types must be explicitly defined and registered in the registry.

- Exceptions

Exceptions are fatal errors that can occur during service execution and require special handling by the PeopleCode program. Service providers must identify exceptions that they believe can occur so that the consumer code can manage the exception.

Define exceptions and register them in the interface registry.

Managing the HCM Interface Registry

To manage the HCM interface registry entries, use the Service Registry component (HMCR_IFC_REGISTRY).

This section discusses how to:

- Register and maintain SOA interfaces.
- Use the HCM interface registry.
- View WSDL code for registry folders.
- Review registry folder audit results.
- Review registry and interface details.
- View WSDL or XSD code for registry entries.

- View RegistryDoc.

Pages Used to Manage the HCM Interface Registry

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Service Registry	HMCR_IFC_REGISTRY	Set Up HRMS, System Administration, HCM Registry, Service Registry, Service Registry	Review the HCM registry and modify existing entries.
<Registry Folder Label>	HMCR_IFC_FLDR_ACT	Click an interface folder on the Service Registry page.	Generate and audit the WSDL for a selected interface folder.
Audit - <Registry Folder Label>	HMCR_IFC_AUD_RSLT	Click the Run Audit button on the <Registry Folder Label> page.	Review the results of a registry folder audit.
Interface Registry - Details	HMCR_WSDL_VIEWER HMCR_IVW_VIEWER HMCR_TYPE_VIEWER	Click a link under the Services, sqlViews, Types, or Exceptions interface folders on the <Registry Folder Label> page.	Review registry and interface details about a selected interface.
<Registry Entry Name>	HMCR_WSDL_RAW_SEC	Click an interface for a service on the <Registry Folder Label> page, and then click the Show WSDL button, or click an interface for a type or exception, and then click on the Show XSD button.	View WSDL code for a service registry entry, or view XSD code for a type or exception registry entry.

Using the HCM Interface Registry

Access the Service Registry page (Set Up HRMS, System Administration, HCM Registry, Service Registry, Service Registry).

Service Registry

Search

Search Filter ☐ Search Descriptions ☐ Wildcard Search

Search

Data [Customize](#) | [View All](#) | [First](#) [1 of 1](#) [Last](#)

Link

Service Registry page (1 of 2)

***Owner Identifier:** HCM Service Framework **Refresh Cache** **Generate Registry Doc**

Select interface name to see details.

Left | Right

- [HCM Registry](#)
 - [HRMS Education And Government](#)
 - [Job Profile Management](#)
 - [Position Management](#)
 - [HCM Shared Components](#)
 - [HR Core](#)
 - [Compensation](#)
 - [Department](#)
 - [Job](#)
 - [Services](#)
 - [sqlViews](#)
 - [Types](#)
 - [Exceptions](#)
 - [Job Attributes](#)
 - [Mass Update](#)
 - [Organization](#)
 - [Person](#)
 - [Workforce Administration](#)
 - [Competency Management](#)
 - [Health and Safety Monitoring](#)
 - [Recruiting Solutions](#)
 - [Campus Solutions](#)

Service Registry page (2 of 2)

The registry lists all the content owners and their interfaces in a tree format. Each tree leaf represents a registered interface. Registered interfaces are grouped by interface folders. Click a registered interface to review interface information on the Details page.

Owner Identifier	Select an owner identifier. The registry displays all interfaces (public and private) defined for the selected content owner in addition to all public interfaces defined by owners other than the selected owner.
Refresh Cache	Click this button to manually refresh the cache where services, types, exceptions, and SQL views are stored whenever you make a change to the registry. You must refresh the cache when a definition is modified, added, or deleted. You must also refresh the cache when an external cache has to be imported.
Generate Registry Doc	Click this button to generate RegistryDoc for the selected HCM service registry. The system generates RegistryDoc in HTML and provides the View RegistryDOC link for you to access the data. The RegistryDoc enables you to view or introspect the registry without having to open the registry, thus offering a quicker view into the registry. Note. RegistryDoc generation relies on configuration of PeopleTools Process Scheduler and report nodes. You should set the directory that acts as the report repository in a shared mode.
View RegistryDoc	Click this link to view RegistryDoc that you have generated. The system opens a new browser window, which displays the registry API content in HTML format.

Searching the Registry

Use the Search capability to look up a registry when:

- You do not know the exact name for or the navigation to the service, sqlView, type, or exception.
- You want to search for the descriptions for a specific word or pattern of a word.

Search Descriptions	Select this check box to search descriptions of registry entries for an exact word that you specify in the Search Filter field. Select this check box and the Search Descriptions check box to search descriptions of registry entries for the word pattern that you specify in the Search Filter field.
Wildcard Search	Select this check box to search registry entries for the word pattern that you specify in the Search Filter field. Select this check box and the Search Descriptions check box to search descriptions of registry entries for the word pattern that you specify in the Search Filter field.

Search Filter

To search registry entries for an exact match of a service, sqlView, type, or exception, enter a value in this field without selecting any check boxes. The system lists the registry entry.

To search registry entries for a word pattern, enter the word pattern in this field and select the Wildcard Search check box. The system lists registry entries that match the pattern that you entered.

To search descriptions of registry entries for an exact word, enter the word in this field and select the Search Descriptions check box. The system lists registry entries with descriptions that contain the exact word.

To search descriptions of registry entries for a word pattern, enter the word pattern in this field and select both the Search descriptions and Wildcard Search check boxes. The system lists registry entries with descriptions that match the pattern that you entered.

Search

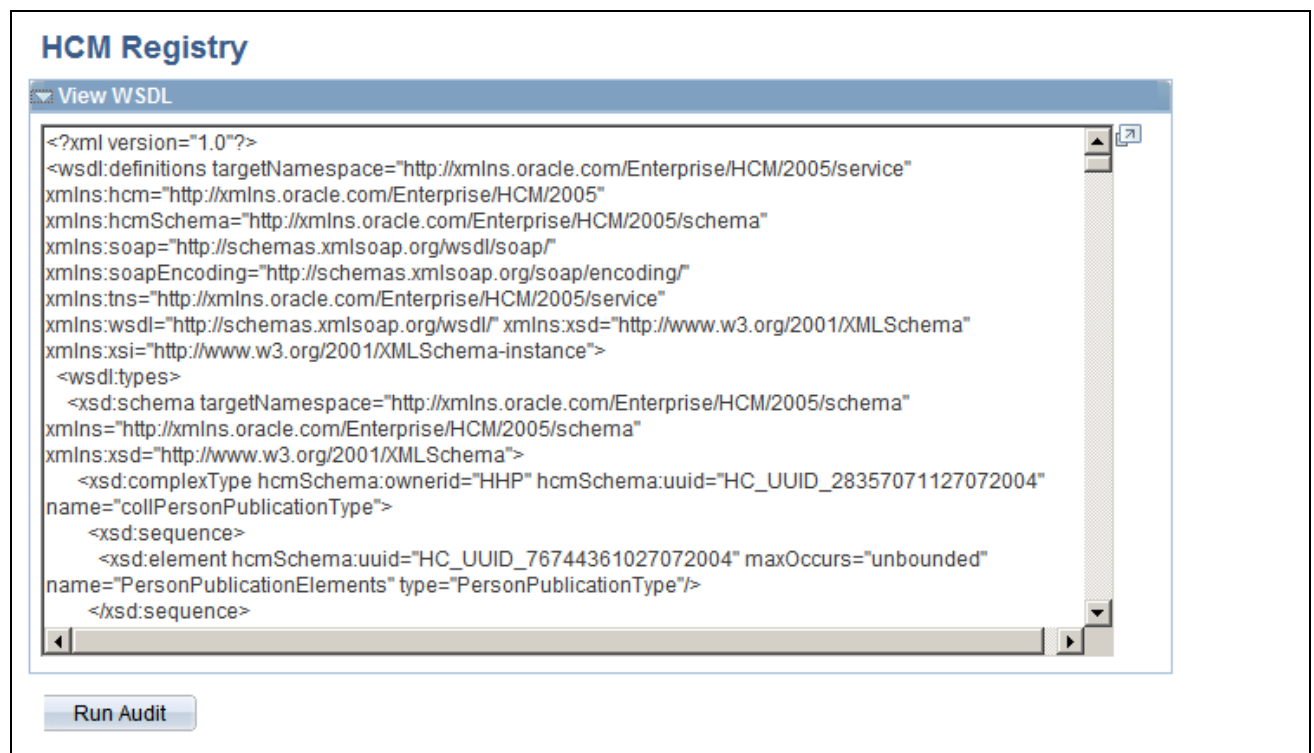
Click this button to retrieve the registry entries that match your search criteria.

Link

Click the link to access the details of the registry.

Viewing WSDL Code for Registry Folders

Access the <Registry Folder Label> page (click an interface folder on the Service Registry page).



<Registry Folder Label> page showing the HR Core interface folder data

Use the View WSDL group box to review the WSDL that the system generated for the selected registry folder. Click the Run Audit button to run an audit on the registry folder. The system displays the Audit - <Registry Folder Label> page for you to review the results of the registry folder audit.

Reviewing Registry Folder Audit Results

Access the Audit - <Registry Folder Label> page (click the Run Audit button on the <Registry Folder Label> page).

Audit - Job						
Data						
	Object owner identifier	Interface Type	Class Path	Portal Label	Warning/Error	Long Description
1	HR Core	Service	HR Core.Job.Services.AddAdditionalAssignment	AddAdditionalAssignment	Warning	1. The Service does not throw any exceptions.
2					Warning	2. Proxy path has not been set.
3	HR Core	Service	HR Core.Job.Services.AddContingentWorkerInst	AddContingentWorkerInst	Warning	1. The Service does not throw any exceptions.
4					Warning	2. Proxy path has not been set.
5	HR Core	Service	HR Core.Job.Services.AddEmploymentInstance	AddEmploymentInstance	Warning	1. The Service does not throw any exceptions.
6					Warning	2. Proxy path has not been set.

Audit - <Registry Folder Label> page

Reviewing Registry and Interface Details

Access the Interface Registry - Details page (click a link under the Services, sqlViews, Types, or Exceptions interface folders on the <Registry Folder Label> page).

HCR_BN_PRG_PR_I

Registry Details

UUID

HC_UUID_33347081508062004

Version

1.0

Status

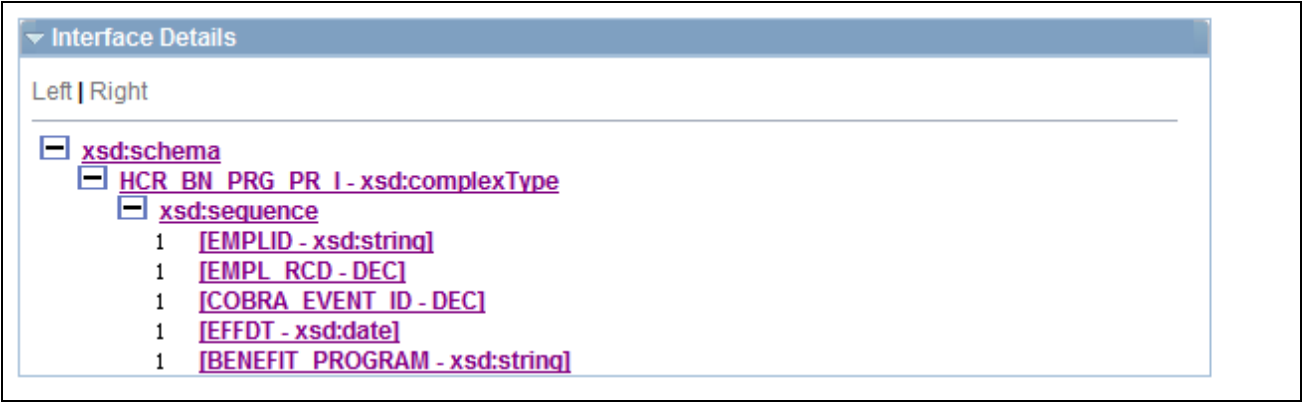
Active

Scope

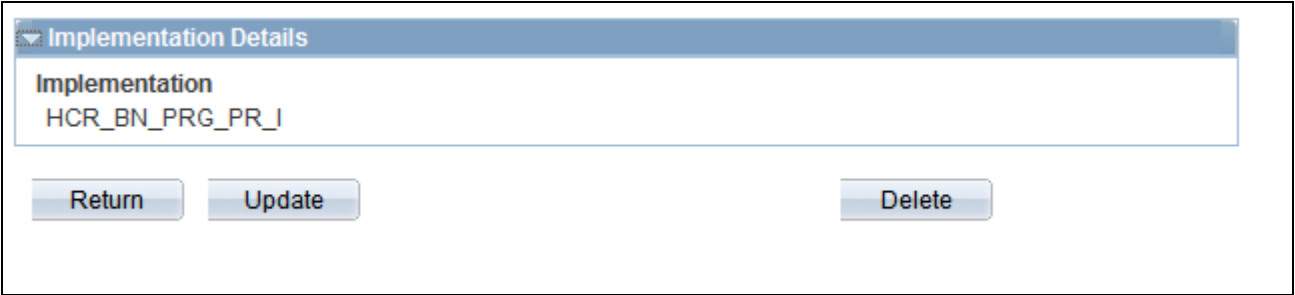
Public

Description

Interface Registry - Details page (1 of 3)



Interface Registry - Details page (2 of 3)



Interface Registry - Details page (3 of 3)

Note. The Interface Registry - Details page is slightly different for each type of interface (services, sqlViews, types, and exceptions).

Registry Details

IUD	The IUD is the interface's unique identifier for a service within the registry. The system generates this identifier.
Locate By	The system automatically displays this value where applicable.
Version	Each registry entry has a version type. You can have multiple versions of an entry when you require multiple version of an interface.

Status

An interface can have one of the following statuses within the registry:

- *Requested*

The interface has been requested by a party but has not been implemented.

- *In Work*

The interface is currently being defined.

- *Active*

The interface is ready for use.

- *Deprecated*

The interface has been replaced by a more current version, but is still supported.

- *Retired*

The selected version of the interface has been retired.

Note. The status of an interface is specific to the entry version.

Scope

This field indicates who can reference this version of the interface:

- If the interface is *Public*, it can be used by any application.
- If the interface is *Private*, it can only be used within the provider module.

Generate Consumer Code

Click to generate the consumer stub code for this registry entry. Use this code to implement the service.

See [Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 605.](#)

Generate Provider Code

Click to generate the provider stub code for this registry entry. Use this code to implement the service.

See [Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 605.](#)

Show WSDL

Click this button to generate Web Services Definition Language (WSDL) code for the service registry entry. WSDL code provides you with all the details about the service that is needed for consuming a service. The system displays the <Registry Entry Name> page where you can view the WSDL code.

Note. Definitions for sqlViews, types, and exceptions do not have WSDL viewing capability.

Show XSD

Click this button to generate XSD code for a type or exception registry entry. XSD code contains the definition of a particular type, which is information that is necessary for consuming complex types. The system displays the <Registry Entry Name> page where you can view the XSD code.

Note. Definitions for services and sqlViews do not have XSD viewing capability.

Run Audit

Click this button to run an audit of the selected registry folder. Audits ensure that the registry is clean. They also enable you to monitor discrepancies between implementation and contracts. The system displays the Audit - <Registry Folder Label> page, where you can review the results of the audit.

Interface Details

Interfaces are defined using an XSD schema. The schema for each interface type is stored in the registry. The system generates the schema during registration.

Note. The schema defines the details of sqlView interfaces, not the database view that implements the view interface. The database view must match the properties defined in the schema.

Service interface types have operations called DoServices. A DoService has one or more input, output, and outfault element and each element is defined by either one or more simple or complex type.

Exception Details

Review a service interface's exception details and the associated messages.

Implementation Details

In the Implementation Details group box, review the fully qualified application class path that implements class for this type or exception. The class path includes a branch indicating the version of this type. The version attribute of the registry entry must match the version in the class path of the type class.

Note. For sqlView interfaces, the Implementation Details box displays the database view implementing the interface view.

Note. All exceptions must extend the class *baseException*, which extends the PeopleTools built-in exception class.

Viewing WSDL and XSD Code for Registry Entries

Access the <Registry Entry Name> page (click an interface for a service on the <Registry Folder Label> page, and then click the Show WSDL button, or click an interface for a type or exception, and then click on the Show XSD button).

AddAdditionalAssignment

```
<?xml version="1.0"?>
<wsdl:definitions targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/2005/service"
xmlns:hcm="http://xmlns.oracle.com/Enterprise/HCM/2005"
xmlns:hcmSchema="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/"
xmlns:soapEncoding="http://schemas.xmlsoap.org/soap/encoding/"
xmlns:tns="http://xmlns.oracle.com/Enterprise/HCM/2005/service"
xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <wsdl:types>
    <xsd:schema targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
xmlns="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
xmlns:xsd="http://www.w3.org/2001/XMLSchema">
      <xsd:complexType hcmSchema:ownerid="HCR"
hcmSchema:uuid="HC_UUID_63830271514102005" name="OraAssignmentType">
```

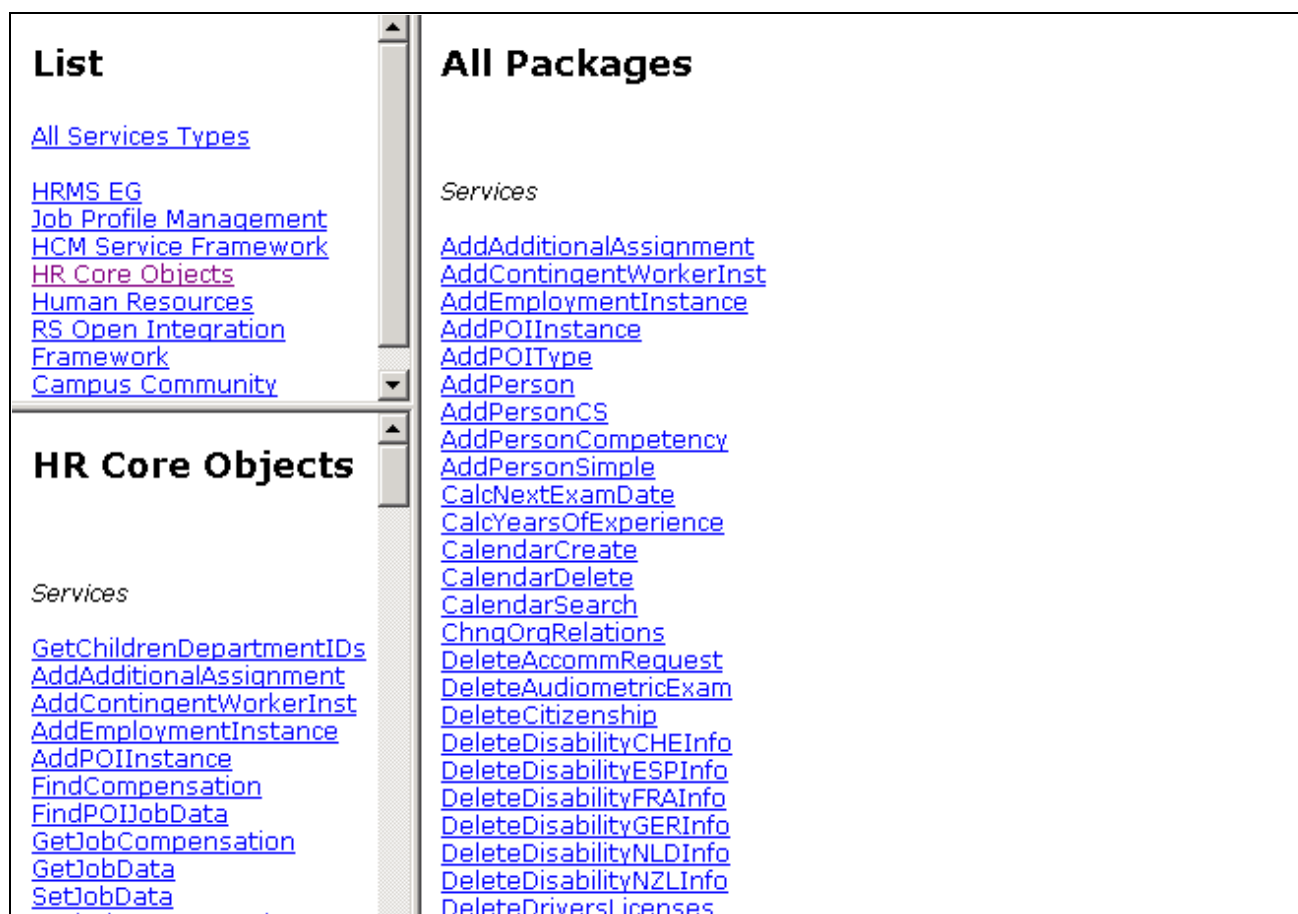
Return

<Registry Entry Name> page

Viewing RegistryDoc

To view RegistryDoc, click the Generate Registry Doc button on the Service Registry page. The system generates the RegistryDoc and displays the View RegistryDoc link.

Click the View RegistryDoc link. The system opens a new browser window, which displays the registry API content in HTML format.



Viewing the RegistryDoc

The page contains three frames. The upper left frame lists the root packages within the RegistryDoc. Click a link for a root package in the upper left frame to view for a list of all of the services, sqlViews, types, and exceptions that are associated with the selected root package. The system displays the details of the selected root package within the lower left frame. The right frame displays the services, sqlViews, types, and exceptions for all root packages.

Click a link in the lower left frame or the right frame to view service, sqlView, type, or exception details.

AddAdditionalAssignment 1.0

[View WSDL 1.1](#)

Service description

This service is used to create an additional assignment for an existing person and existing organizational instance.

Service usage

This service accepts an `OrganizationalAssignmentType` as input. Also, there is a boolean flag, `IgnoreBlanks`, which depending on how it is set the service will act accordingly. If set to `True` then any blank values in the `OrganizationalAssignmentType` are ignored. If set to `False`, then any blank values will be treated as an attempt to blank out the existing value. This service returns the updated `OrganizationalAssignmentType` as an output.

Service properties

UUID	HC_UUID_25856401612122005	Owner Id	HR Core Objects
Path	HR_Core.Job.Services.AddAdditionalAssignment		

Service attributes

Scope	Public	Status	In Work
Deployment	Local	Deployment Node	LOCAL_NODE
Implementation Path	HCR_JOB_SERVICES:Job:AddAdditionalAssignment_v1_0:implAddAdditionalAssignment		
Proxy Path			

Interface operation details

Service Operation Name		DoService
Input Parameters		
Name		Type
inIgnoreBlanks		boolean
inOrgAssignmentType		OrgAssignmentType
Output Parameters		
Name		Type
outOrgAssignmentType		OrgAssignmentType

Method Signature

```
DoService(&inIgnoreBlanks As boolean, &inOrgAssignmentType As OrgAssignmentType, &outOrgAssignmentType As OrgAssignmentType)
```

Viewing service details

From a service details page, click on the View WSDL link to view WSDL code for the selected service.

```

<?xml version="1.0" ?>
- <wsdl:definitions targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/2005/service"
  xmlns:hcm="http://xmlns.oracle.com/Enterprise/HCM/2005"
  xmlns:hcmSchema="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
  xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/"
  xmlns:soapEncoding="http://schemas.xmlsoap.org/soap/encoding/"
  xmlns:tns="http://xmlns.oracle.com/Enterprise/HCM/2005/service"
  xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"
  xmlns:xsd="http://www.w3.org/2001/XMLSchema"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
- <wsdl:types>
- <xsd:schema targetNamespace="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
  xmlns="http://xmlns.oracle.com/Enterprise/HCM/2005/schema"
  xmlns:xsd="http://www.w3.org/2001/XMLSchema">
- <xsd:complexType base="hcmSchema:ownerid" name="HCR"
  hcmSchema:uuid="HC_UUID_63830271514102005" name="OrgAssignmentType">
- <xsd:sequence>
  <xsd:element minOccurs="1" name="EMPLID" type="xsd:string" />
  <xsd:element minOccurs="1" name="EMPL_RCD" type="xsd:decimal" />
  <xsd:element minOccurs="1" name="PER_ORG" type="xsd:string" />
  <xsd:element minOccurs="1" name="ORG_INSTANCE_ERN" type="xsd:decimal" />
  <xsd:element name="POI_TYPE" type="xsd:string" />
  <xsd:element name="CMPNY_DT_OVR" type="xsd:string" />
  <xsd:element name="CMPNY_SENIORITY_DT" type="xsd:date" />
  <xsd:element name="SERVICE_DT_OVR" type="xsd:string" />
  <xsd:element name="SERVICE_DT" type="xsd:date" />

```

Viewing WSDL code for a selected service

If a service or type refers to another complex type or exception, click on the type link on the details page to view type or exception details.

OrgAssignmentType 1.0

Type description

-

Type usage

-

Type properties

UUID

HC_UUID_63830271514102005

Owner Id

HR Core Objects

Path

HR Core.Job.Types.OrgAssignmentType

Type attributes

Scope

Public

Status

In Work

Implementation Path

HCR_JOB_TYPES:Job:OrgAssignmentType_v1_0:OrgAssignmentType

Type class properties

Name

Type

EMPLID

string

EMPL_RCD

decimal

PER_ORG

string

ORG_INSTANCE_ERN

decimal

POI_TYPE

string

CMPNY_DT_OVR

string

CMPNY_SENIORITY_DT

date

Viewing type details for a selected service

Registering New Interfaces

To register new interfaces, use the Registration Wizard component (HMCR_WZ_REGSRV).

This section discusses how to:

- Enter interface information in the Registry Wizard.
- Enter interface specifications.
- Implement the interface.

Pages Used to Register New Interfaces Through the Registration Wizard

Page Name	Definition Name	Navigation	Usage
Registry Information	HMCR_WZ_STEP1	Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Registry Information	Enter information about a new interface.

Page Name	Definition Name	Navigation	Usage
Interface Specification	HMCR_WZ_STEP2	Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Interface Specification	Enter details about the new interface.
Implementation	HMCR_WZ_STEP3	Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Implementation	Complete the registration of the new interface by implementing the interface.

Entering Interface Information in the Registry Wizard

Access the Registry Information page (Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Registry Information).

Step 1 of 3

1 2 3
Continue

Registry Information

***Type**

Service

☐ Service Undo Required

***Name**

TestType

***Version**

1.0

Description

Complex type for testing purposes

***Status**

In Work

***Object owner identifier**

Human Resources

***Scope**

Public

[Select parent folder](#)

★ Parent Folder is required.

Registry Information page

Type	Select the interface type. Note. The pages in this component and the information you enter can vary depending on the type of interface you select here.
Name	Enter a meaningful name for the interface using the following guidelines: • One word (no spaces). • Mixed case. • In one of the following formats, depending on the interface type: in the format, <Noun>Exception, <Noun>Service, or <Noun>sqlView, depending on the type of interface you are registering. • For Type interfaces: <Noun>Type. • For Service interfaces: <Verb><Noun>. • For Exception interfaces: <Noun>Exception. • For Interface Views: <Noun><Noun>. Note. Users see the name you enter here on the registry tree so make sure that the name is clear and meaningful.
Version	Indicate the interface version using the format n.n. You can have multiple active versions of an interface.
Status	Select the status of this version of the interface: • <i>Requested</i> The interface has been requested by a party but has not been implemented. • <i>In Work</i> The interface is currently being defined. • <i>Active</i> The interface is ready for use. • <i>Deprecated</i> The interface has been replaced by a more current version, but is still supported. • <i>Retired</i> The selected version of the interface has been retired.
Object owner identifier	Select the interface provider.

- Scope

Indicate if the interface is *Public* (available to everyone) or *Private* (available only to the provider application).
- Select parent folder

Click this link to access the registry folder structure and select the folder within which the new interface will reside. Group interfaces by feature.

Entering Interface Specifications

Access the Interface Specification page (Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Interface Specification).

Step 2 of 3

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BackContinue

Interface Specification

DoService Request

Seq Nbr	Element Name	Category	Simple Type		
1	PERSID	Simple	xsd:string	+	-
2	State	Simple	xsd:string	+	-
3	Country	Simple	xsd:string	+	-

Interface Specification page

Note. The system displays a different version of this page depending on what type of interface you're registering. See the Registering Services section for information on how to use this page to register service interfaces.

- Initialize from Implementation

If you are basing the Interface View definition on an interface that has already been implemented, click Initialize from Implementation and select the view. The system populates the elements with the fields from the fields in the view's record.

Note. The system only displays this link when you register Interface Views.
- Seq Nbr(sequence number)

Indicate the order in which the element should occur.

Element Name	Enter the element name. An element is a property of the interface. Element names must be one word, mixed case, and self-describing.
	Note. If you are implementing an Interface View, you must add an element to correspond with each field in the view's record.
	Note. Service interface elements are descriptive items that identify the parameter in a given position. While the position of the elements must correspond to a parameter, it does not have to be a PeopleSoft field name.
Type Category	Select the element category. Categories indicate whether the element's data type is simple or complex. A simple datatype is a system-delivered data format. Complex datatypes reference other interface types already in the registry.
	Note. Always select <i>Complex</i> for Exception elements.
	Note. The system selects <i>Simple</i> for Interface Views and this field is unavailable for entry.
Simple Type	If the element is simple, select the element's system-delivered data format type:
	• <i>xsd:string</i> • <i>xsd:date</i> • <i>xsd:number</i> • <i>xsd:boolean</i>
Complex Type	If the type is complex, select the registered element to which it refers.
	Note. If the interface is an exception, you must select <i>ExceptionType</i> from the Service Framework folder.
Minimum Occurrences	Indicate the minimum number of times this element can occur. Select <i>0</i> if the occurrence is optional and <i>1</i> if the element must occur at least once.
	Note. You must select <i>1</i> for Exception elements.
Maximum Occurrences	Indicate the maximum number of times the element can occur.
	Note. You must select <i>1</i> for Exception elements.

Registering Services

When you register a service, enter the follow information in the four group boxes:

- DoService Request

When a service interface will be used to request information, use the fields in this grid to define the service's request parameters.

- DoService Response

When a service interface will be used to respond to requests for information, use the fields in this grid to define the service's request parameters.

- Exceptions

List all of the exceptions defined for the service interface. You can only select exceptions that have already be added to the registry.

- Warnings

List all of the warnings and messages that could be logged during the execution of the service and that are meaningful to the consumer.

Implementing the Interface

Access the Implementation page (Set Up HRMS, System Administration, HCM Registry, Registration Wizard, Implementation).

Step 3 of 3

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Back

Implementation

*Deployment

Local

Package Root

Class Path

Implementation AppClass

Proxy AppClass

Cancel

Register

Implementation page

Note. The system displays a different version of this page depending on what type of interface you're registering. See the Registering Interface Views section for information on how to use this page to register interface views.

Deployment and Deployment Node	The system displays this field only when you register a Service interface. Indicate if the service is <i>Local</i> (resides in the same database as the consumer) or <i>Remote</i> (resides outside the consumer's database). If the service is remote, select the deployment node.
Package Root	Select the provider's root package. The root suffix depends on the interface type you are registering: • For Type interfaces: <ownerID>_TYPES. • For Exception interfaces: <ownerID>_EXCEPTIONS. • For Service interfaces: <ownerID>_SERVICES.
Class Path	Select the class path to the appropriate version of your type class.

**Implementation
AppClass**

Once you have implemented the class, return to the registry to select the interface's application class. Do not select a value when you initially register the interface; wait until you have implemented the interface.

See [Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 605](#).

Note. If you are implementing a Service interface, populate this field only if the service is local.

Generate Class Code

Click to generate the PeopleCode for the implementation AppClass. You can copy and paste the code into your application class object when you implement the interface.

See [Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 605](#).

Note. The system does not display this button when you register Service interfaces.

Register

Click to register the interface definition. When the system successfully registers the definition it will display the interface's IUD.

Registering Interface Views**Interface View**

After you have implemented a sqlView for this interface, return to this page and select the view that corresponds to this Interface View.

See [Chapter 24, "Registering Interfaces," Implementing Registered Interfaces, page 605](#).

**Related Language
Interface View**

The system displays the related language view defined in for the implementation in Application Designer, if one exists.

Implementing Registered Interfaces

After you have registered the interface, implement it in the providing application. The providing application must implement the interface accurately so that the consumer application does not encounter any unexpected behavior.

This section discusses how to:

- Implement types.
- Implement services.
- Implement exceptions.
- Implement SQLViews.

Implementing Types

To implement a registered type interface:

Note. Implement registered types as PeopleCode application classes.

1. In Application Designer, create an application package for each functional module using the naming convention <NAMESPACE_PREFIX>_TYPES.

Use the first level sub-package to group implementation classes by function and the second level to group classes by versions.

2. Create the application class that is implementing the interface type.

When you create the application class, you must ensure that it:

- Extends the `baseType` class.
 - Imports the package with the `baseType` parent class definition.
 - Exposes a read-only property IUD with the type *string*.
 - Has a IUD property that contains the correct IUD of the corresponding registry entry.
 - Instantiates any array properties defined in the class as array properties with 0 elements.
 - Implements the following mandatory public methods: `toXmlNode`, `toXmlNodeString`, `fromXmlNode`, and `truncateType`.
3. Copy the stub code the system created when you clicked the Generate Class Code button on the Registry Wizard - Implementation page for this interface and paste it into the application class implementing the interface type.

The generated type stub code includes the following mandatory methods:

```
method toXmlNode(&parentNode As XmlNode);
method fromXmlNode(&parentNode As XmlNode);
method toXmlNodeString(&nodeName As string) Returns string;
method TruncateType();
```

The system uses the XML mandatory methods to marshal and unmarshal the type to or from an xml representation, which is required in order to use this type in a remote service invocation. The *truncateType* mandatory method resets the value of all type elements.

4. Access the registry entry for the type interface in the Registry Wizard and add the application class to the type's implementation details.

Implementing Services

Consumer programs cannot directly instantiate service implementation classes. Due to late binding and remote procedure call support, the framework delays the resolution of the implementation class name until run-time so the only information available to service consumers during design is the interface name.

At run-time, the service manager resolves the interface name into the implementation class name using the registry lookup functionality. Depending on the implementation details defined in the registry, the service manager will return to the consumer either an instance of a local implementation class or a proxy class for the remote implementation.

Because of these considerations, the providing application needs to supply the following two application classes to fully implement a service:

- An interface that consumer applications can refer to during design.
- An implementation class that the service manager can bind to during run-time.

Note. Implement registered services as PeopleCode application classes.

To implement a registered service interface:

1. In Application Designer, create an application package for each functional module using the naming convention `<NAMESPACE_PREFIX>_SERVICES`.

Use the first level sub-package to group implementation classes by function and the second level to group classes by versions. Use the third (application class) level to define an interface and an implementation for the service.

2. Create two application classes to implement the service, an interface and an implementation class.
3. Select the registry entry for this service and click the Generate provider Code button. The system displays a page with three group boxes containing code:

- Interface peoplecode

Copy and paste the interface PeopleCode into the interface application class.

- Implementation peoplecode

Copy and paste the implementation PeopleCode into the implementation application class. The implementation code generated is only a skeleton the actual logic for the application class. The development team must therefore modify the implementation class to meet the providing application's needs.

- Proxy peoplecode

4. Confirm that the interface and implementation classes contain the necessary information.

The two applications serve different functions. The interface class is an abstract definition and details what methods and properties the implementation class will have to have to comply with registered specifications, but it does not contain the implementation details. The implementation class actually implements the interface, providing the executable code for the abstract method definitions.

The interface application class must:

- Have names identical to the name of the registered service.
- Extend the `baseService` class.
- Imports the `baseService` parent class definition.
- Contain a constructor method that creates an instance of the parent `baseService` class.
- Define an abstract `DoService` method with the signature matching the signature of the registered service.

5. Confirm that the implementation of the service:

- Implements the interface.
- Provides a concrete implementation of the `DoService` method.

When a development team decides to provide a service, they create an interface and implementation class that implements it.

- Imports the interface that it implements, as well as the types and exceptions it is working with.

This happens once you generate the provider code.

- Throws exceptions in accordance with the registered interface contract in order to handle errors.
- Can log warnings in accordance with the interface contract.

The interface application class provides details of all warnings that were generated when the service was executed.

- Uses the API2CI framework to abstract from the component interface specifics, if the implementation is component interface-based.

Component interface-based services need to import the CI library (which is provided with the registry) using this code:

```
import HMCR_API2CI
```

If you are using a `DoService` method, you need to declare two local objects: `ciHandler` and `ciIdent`. `ciHandler` is the class managing all access to a component interface since you cannot directly manipulate a component interface. `ciIdent` defines the unique attributes of each `ciHandler` instance.

6. Access the registry entry for the service interface and add the implementation application class to the type's implementation details.

Note. You can use services to organize multiple other services to execute an business task. This is called aggregating services. The aggregating service is the service responsible for managing the business transaction, housekeeping, and performing the save processing so these processes are run only once, improving overall performance. When a service is running another service in aggregation mode, the calling service (the aggregating service) sets the RunAggregated flag on the called service, causing the called service to skip the housekeeping and save processing.

Implementing Exceptions

PeopleSoft delivers a baseException class providing the default exception handling, which is on the PeopleTools exception class. The baseException class constructor takes the following parameters:

- An instance of a service log.
- A message set number and message number.
- Default message text.
- Message parameters 1–5 or "Null" when none.

The base Exception class constructor executes the following logic:

- Adds PSMessages collection to the service log.
- Creates a PeopleTools exception for the provided message set and message number.

To implement a registered type interface:

Note. Implement registered exceptions as PeopleCode application classes.

1. In Application Designer, create an application package for each functional module using the naming convention <NAMESPACE_PREFIX>_EXCEPTIONS.

Use the first level sub-package to group implementation classes by function and the second level to group classes by versions.

2. Copy the stub code the system created when you clicked the Generate Class Code button on the Registry Wizard - Implementation page for this interface and paste it into the application class implementing the exception.
3. Confirm that the exception implementation contains the following:
 - A link to an entry in the PeopleTools message catalog.
 - Default error processing.
 - Exception-specific error processing, where necessary.

Note. The exception's registry entry defines the exception name, the fault message structure, and the exception semantics (description).

4. Confirm that the implementation of the exception class:

- Name is identical to the registry entry name.
- Extends the `baseException` and import the `baseException` class definition.
- Contains a constructor that:
 - Takes an instance of a `LogType` as a single parameter and imports the `LogType` class definition.
 - Facilitates the default error processing by wan of an instance of a parent class.
 - Assigns the correct IUD of the corresponding registry entry to its IUD property.
- Exposes a read-only property IUD with a type of *string*.

Implementing SQLViews

To implement a registered `sqlView` interface:

Note. Implement registered `sqlView` interfaces as PeopleSoft record definitions with a type of *view*.

1. Create fields on the record definition to correspond to each field in the registered `sqlView` interface.
2. Run SQL Create to create the view in the database.
3. Open the `sqlView` registry entry and add the implementation record name to the registry entry.

When you are creating a new interface view, you must use the Registry Wizard component. When you are updating an existing view, you must use access the registry and click the Update button. The system then displays the Registry Wizard component.

See [Chapter 24, "Registering Interfaces," Registering New Interfaces, page 598](#).

Consuming Registered Interfaces

This section provides an overview of registered interface consumption and discusses how to:

- Invoke service interfaces.
- Set up stale data checks in service calls.
- Pool component interfaces.
- Consume collection-sized interfaces.
- Bind complex types to and from portal pages.
- Consume SQLViews.

Understanding Registered Interface Consumption

If there is an interface in the registry that your application needs to use, you must create code in PeopleCode events in the consuming application to invoke the interface.

Note. You can click the Generate Consumer Code button on the Registry Details page for the registered service to generate all the code the consuming application needs. Cut and paste the code into the consuming application's PeopleCode Event (for example, SavePostChange PeopleCode). Confirm that the generated code meets the criteria set out in these steps and make any necessary modifications.

Note. You can only place the code for manipulative services such as *Set*, *Add*, or *Delete* in the SavePostChange PeopleCode of a single field in a component. You cannot spread out manipulative service calls over several PeopleCode events. You must also not place manipulative service calls in FieldChange PeopleCode.

Invoking Service Interfaces

Consuming applications invoke service interfaces in four steps:

1. Import, declare, and create framework classes, service classes, and type classes.
2. Bind to the service implementation using the Service Manager's LocateService method.

At runtime, the Service Manager determines the appropriate implemented interface application class and returns an instance of it to the consuming application for invocation as follows:

- a. The import statement in the consumer code indicates which registered interface is required.
- b. The registered interface contains information about which implemented interface class is required.
- c. The Service Manager's LocateService method returns an instance of the implementation class.

Note. The LocateService method requires the service name and the service version in order to bind to the appropriate service.

The consumer code only needs to know which registered interface it is using. The provider application specifies which implemented class should be returned to the consumer. This enables the provider to make changes to the implemented interface without impacting the consumer.

3. If you are invoking a type interface, the consumer application needs to set the properties of the type class in the input parameters prior to passing it to the DoService call.

The type interface registry entry describes the properties of the type class. The consumer can map properties individually from the consuming application to the type class properties.

4. Invoke the DoService method of the service implementation class, passing the parameters as defined in the service signature.

The service signature defines the zero or more input and output parameters that need to be passed to the service. Parameters can be simple types (such as string, number, date, or boolean) or complex types defined and registered as types in the interface registry:

- When the service requires complex types as parameters, the consumer needs to import the type class, declare it as a local variable and instantiate it using the Create instruction.
- When the service requires simple types, the simple types only need to be declared by the consumer.

5. Catch and manage exceptions.

The consumer code must invoke all services within a try-catch block. All code executed in between the try and the catch statement is in a protected area so that any exceptions thrown during service execution will immediately return control to the catch statement in the consumer code. The consuming application can then react to the exception.

The consumer code can catch specific exceptions or the baseException, which is the parent class to all registered exceptions.

Note. The consuming code should always catch for baseException to catch exceptions not specific to the service.

6. Analyze the service execution log for relevant information.

During service execution, the registry framework collects all warnings and messages issued by the provider and exposes them to the consumer as a service execution log. The consumer can query the execution log and take action based on the warnings and messages, if necessary.

Each service has a property called ExecutionLog. The property has an array of LogType called Log. The LogType has the following attributes:

- DEFAULT_TEXT
- MESSAGE_SET_NBR
- MESSAGE_NBR
- MESSAGE_SEVERITY

The service's Log class has a generic method ShowLog() to display the content of the execution log.

Note. All consumer PeopleCode runs within the scope of a consumer component session. Any services that the system invokes during the component runtime will also run within this transaction scope. If the service execution encounters fatal errors, the system will roll back the entire component transaction unless the errors are specifically caught as exceptions. For example, if the a component in the consumer application uses two services invoked by the SavePostChange PeopleCode and one executes successfully while the other throws a fatal error, the system will not save any data to the component from either service.

Setting Up Stale Data Checks in Service Calls

If the service call is updating the component in the consumer application with an action of *Add*, you do not need to set up a check for stale data and you can invoke the service in `Component.SavePostChangePeopleCode`.

However, if the service is to update prior selected data, you need to set up a stale data check to ensure that the underlying data has not been modified during user interaction on the consumer side. To do this, create a *Get* service in the `Component.PostBuildPeopleCode` and a *Set* service in the `Component.SavePostChangePeopleCode`.

If the registry detects a discrepancy in the data, it will cause an error, which can be caught using `baseException`.

Pooling Component Interfaces

Several services may use the same instance of a component interface in their implementations. To improve performance, you can pool component interfaces. Component interfaces must be scoped to one local `PeopleCode` event, but within that event the code can send several calls to services using the same open component interface.

The system then passes the component interface pool to the Service Manager's `LocateService` method. If a requestor is only issuing one service call in a `PeopleCode` Event, the system passes `NULL` as a component interface pool.

Consuming Collection-Sized Services

You can set up services to operate on items or on collections (row sets). If the consuming application is working with a collection of rows, you must set up the consuming application to pass the entire collection to the service. The service removes any items that are not passed into the service in the collection. If consumer passes an empty collection, it will effectively remove all the data rows in the provider implementation.

Use a collection-sized *Get* service to populate the collection type class, manipulate it, and pass it back to the *Set* service.

Binding Complex Types To and From the Portal Pages

All services work with simple or complex types as parameters. Simple types are available as `PeopleCode` data types. The provider application implements complex types as application classes. It is not possible to view application class properties directly on a page so it is necessary for the consumer application to create pages based on `Rowset.Row.Record.Field` objects and map the type class properties to the fields.

In the consumer code, set up a call to the helper method *PopulateToRowset* to bring all data from the type class instance to the user interface of the consumer component. Set up a call to the helper method *PopulateFromRowset* to bring all values from the rowset used in the user interface of the type class.

Note. Not all type classes provide helper methods and not all helper methods will work in all consumer components. In these cases, you will need to write your own logic to bind the type class values to the consumer user interface.

Consuming SQLViews

Consuming applications can use registered sqlViews directly without binding. Use registered sqlViews for the following:

- Search views.
- Prompting.
- Related display.

Maintaining the Registry Folder Structure

To administer the HCM interface registry, use the Administer Service Registry component (HMCR_CONTENT_ADMIN).

This section discusses how to maintain the registry folder structure.

Page Used to Maintain the Registry Folder Structure

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Administer Service Registry	HMCR_CONTENT_ADMIN	Set Up HRMS, System Administration, HCM Registry, Administer Service Registry, Administer Service Registry	Add or delete folders from the registry.

Maintaining the Registry Folder Structure

Access the Administer Service Registry page (Set Up HRMS, System Administration, HCM Registry, Administer Service Registry, Administer Service Registry).

Administer Service Registry

Operation:

Registry Details

Folder Label: ☐ Final Level

*Owner ID:

Enter folder details and select 'Create Tree' button

Administer Service Registry page (1 of 2)

Administer Service Registry

Operation:

Select the folder that you wish to delete. (Note: Root Node cannot be deleted)

Left | Right

-  [HCM Registry](#)
 -  [HRMS Education And Government](#)
 -  [Job Profile Management](#)
 -  [Job](#)
 -  [Person](#)
 -  [Profile](#)
 -  [Position Management](#)
 -  [HCM Shared Components](#)
 -  [HR Core](#)
 -  [Workforce Administration](#)
 -  [Competency Management](#)
 -  [Health and Safety Monitoring](#)
 -  [Recruiting Solutions](#)
 -  [Campus Solutions](#)

Administer Service Registry page (2 of 2)

Create Folders

To create a new folder, select *Create Folder* in the Operation field and enter the folder's registry details.

Folder Label Enter the folder label that will appear in the registry.

Owner ID Select the folder content's owner ID from the list of options.

- Final Level

Indicate if the folder is a final folder. A final folder can not have any child folders other than the folders for the four interface types. If you make this folder a final folder, the system will create the four interface folders.

If you leave this check box deselected, the folder is a feature folder and you can add child folders to it.
- Create Tree

After you have entered the folder details, click the Create Tree button. When you click the button the system generates a new registry tree. Navigate through the tree and select the node under which the new folder should go.

You can only place a new folder under folders that have the same owner ID and that are not final level folders.

Delete Folders

To delete a folder, select *Delete Folder* in the Operation field. Expand the registry tree, locate the folder you want to delete, and click on it. You cannot delete a folder that contains registered interfaces within one if it's child folders.

Testing Services

To test newly created services, use the Service Tester component (HMCR_SRV_TESTER).

This section discusses how to test services.

Page Used to Test Services

Page Name	Definition Name	Navigation	Usage
Service Tester	HMCR_SRV_TESTER	Set Up HRMS, System Administration, HCM Registry, Service Tester, Service Tester	Test newly created services in this generic component.

Testing Services

Access the Service Tester page (Set Up HRMS, System Administration, HCM Registry, Service Tester, Service Tester).

Service Tester

Test Name: PS_TEST

Service Name: AddAdditionalAssignment

Version: 1.0

UUID: HC_UUID_25856401612122005

Run Service

☐ Add

☒ Use Tree Input

☐ Use Input Parameter as Output

☒ Correction

☐ Use XML Input

☐ Update/Display

Expand All

Collapse All

Left | Right

inOrgAssignmentType

EMPLID - (blank)

EMPL_RCD - (blank)

PER_ORG - (blank)

ORG_INSTANCE_ERN - (blank)

POL_TYPE - (blank)

CMPNY_DT_OVR - (blank)

CMPNY_SENIORITY_DT - (blank)

SERVICE_DT_OVR - (blank)

SERVICE_DT - (blank)

Service Tester page

Use this page to test newly created services through a generic component. For example, if you create a new service using the Registration Wizard component and the corresponding implementation code, you can use this page to test the service and ensure that service you are committing works as designed. The system returns the results of the service test in a new window as XML.

- Add, Correction, or Update/Display

Select the mode that the service will run in. You can use these options to test the service running in the various modes.

Use Tree Input and Use XML Input

Select to populate inputs using an XML format (SOAP 1.2) or using the tree structure. When you click the Use XML Input button, the system converts the tree inputs to the corresponding SOAP document. This is useful for testing remote services, for populating the inputs of a larger service, and for copying an existing service to a new service test (similar to "save as" functionality).

Use Input Parameters as Output

Select this check box for services which have no input parameters but do update the input parameters that are passed in. This is valid only for local services because remote services cannot update inputs by reference. It is not recommended for local services but can be used where local services where this situation exists.

Run Service

Click this button to invoke the service request after you have populated the inputs. Upon completion of the service call, the system displays the outputs of the service in a new window as XML.

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Viewing and Registering Transformation Maps

To view transformation maps, use the Transformation Registry component (HMTF_TRF_REGISTRY). To register transformation maps, use the Register Transformation Map component (HMTF_WZ_TRF).

This section discusses now to:

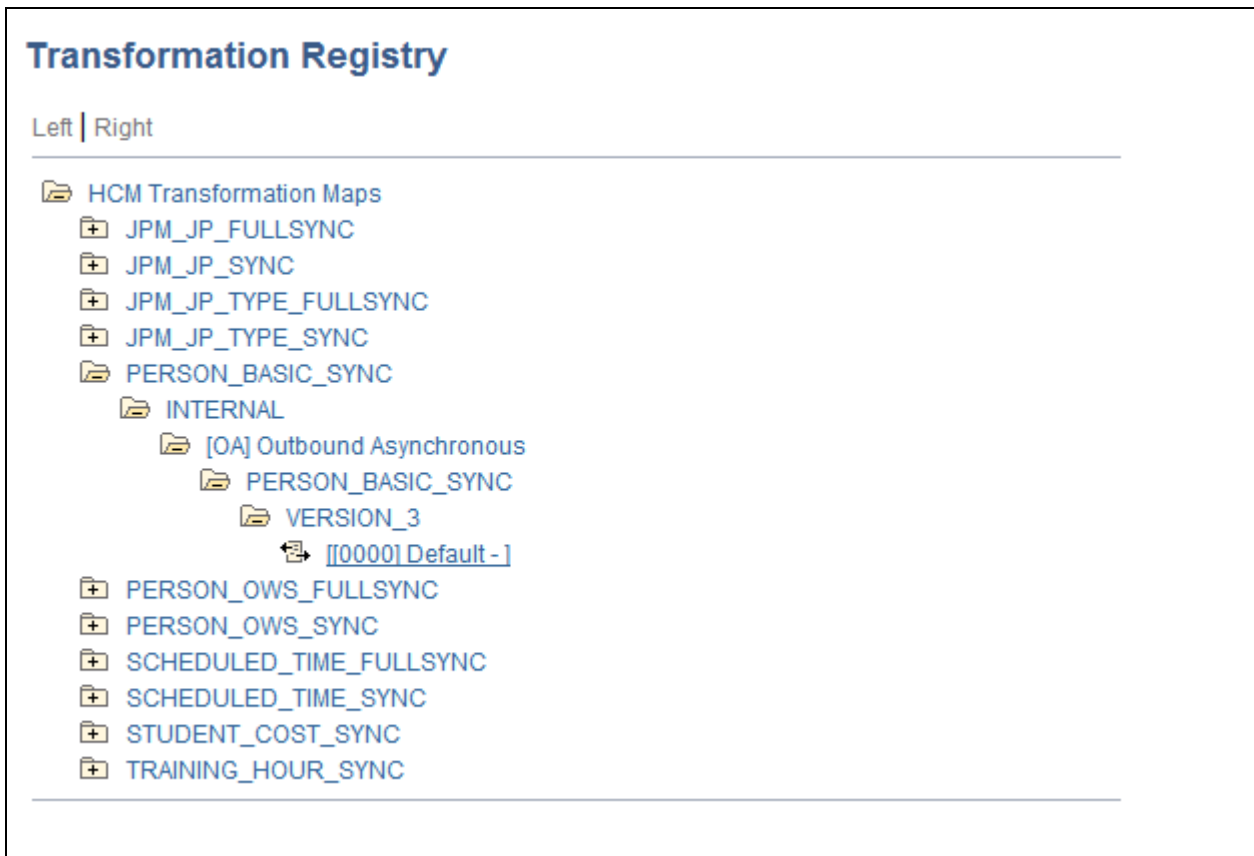
- View transformation maps.
- Register transformation maps.

Pages used to View and Register Transformation Maps

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transformation Registry	HMTF_TRF_REGISTRY	Set Up HRMS, System Administration, HCM Registry, Transformation Registry, Transformation Registry	View HCM transformation maps.
Transformation Map	HMTF_WZ_STEP1	Set Up HRMS, System Administration, HCM Registry, Register Transformation Maps, Register Transformation Map	Create transformation maps for messages from one message version to another.

Viewing Transformation Maps

Access the Transformation Registry page (Set Up HRMS, System Administration, HCM Registry, Transformation Registry, Transformation Registry).

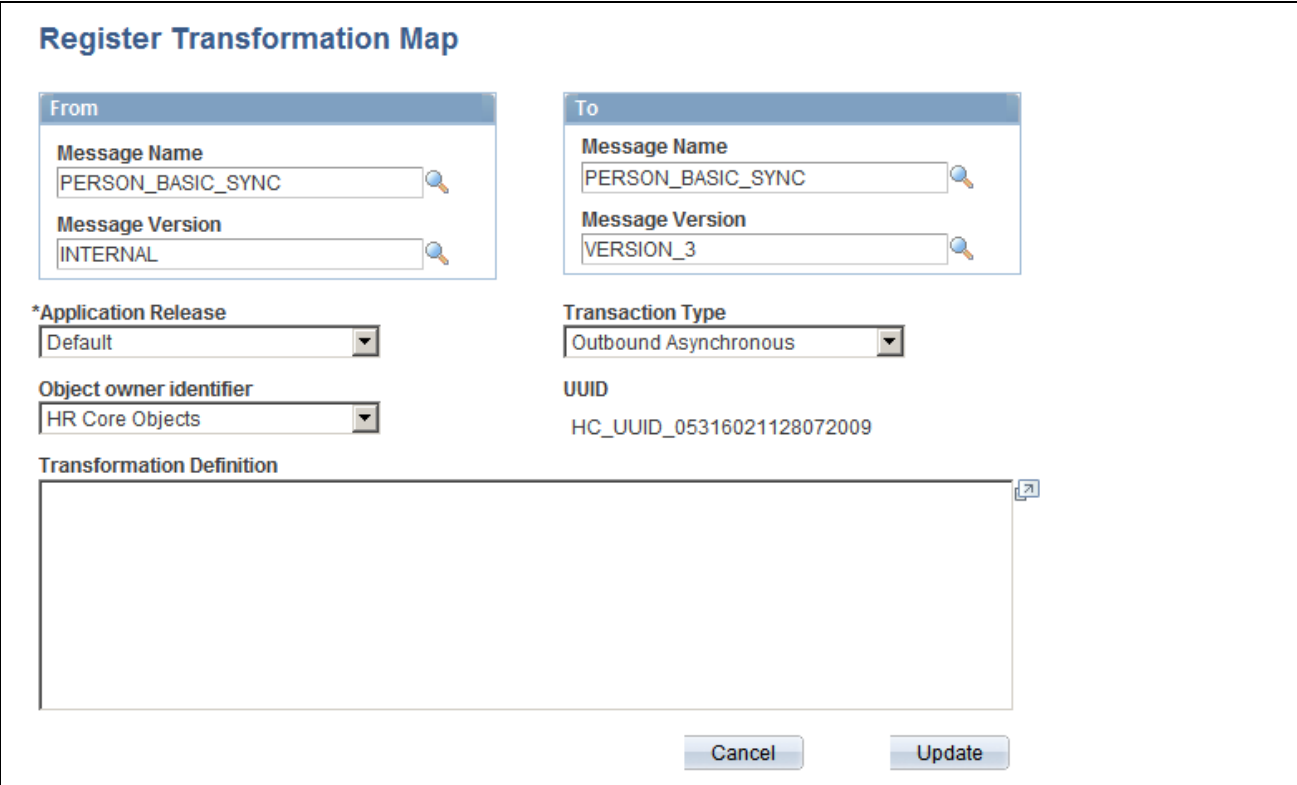


Transformation Registry page

Use this page to view details of transformation maps, which instruct the system to convert incoming messages (From) into (To) a specific format. Primarily this is done because, between release, the record definitions may have undergone a change.

Registering Transformation Maps

Access the Register Transformation Map page (Set Up HRMS, System Administration, HCM Registry, Register Transformation Map, Register Transformation Map).



Register Transformation Map

From Message Name PERSON_BASIC_SYNC Message Version INTERNAL *Application Release Default Object owner identifier HR Core Objects Transformation Definition	To Message Name PERSON_BASIC_SYNC Message Version VERSION_3 Transaction Type Outbound Asynchronous UUID HC_UUID_05316021128072009

Register Transformation Map page

When you need to exchange information between two different release of a PeopleSoft Enterprise product you must perform transformations. With each release record definitions sometimes undergo changes. Transformations enable you to scale these problems by transforming messages from one release to another. Use this page to create transformation maps for messages from one release to another and from one version to another.

Message Name	Select the message that needs to be transformed from one version to another.
Message Version	Select the version of the message that needs to be transformed for one version to another.
Application Release	Select which PeopleSoft Enterprise application release that the message belongs to. For example, specify whether the message is from the HRMS 8.3 system or the HRMS 8.8 system. The <i>Default</i> value is that the system use the current release of the product.
Transaction Type	Select the type of transaction of the message, either <i>Inbound Asynchronous</i> , <i>Inbound Synchronous</i> , <i>Outbound Asynchronous</i> , or <i>Outbound Synchronous</i> .
Object owner identifier	Select the owner of the message object.
IUD	The system displays a unique identifier for the transformation. The system generates this identifier.

Transformation Definition	View the definition of the transformation in XML format.
Register	Click this button to register the transformation.

Mapping HCM Services to Integration Broker

This section provides an overview of HCM service mapping to Integration Broker and discusses how to:

- Map HCM services to Integration Broker.
- Delete mapped services.
- Use Integration Broker to provide web services.

Understanding HCM Service Mapping to Integration Broker

You can invoke HCM services from remote (non-PeopleSoft) systems. The SOA framework contains built-in functionality to process an incoming requests (services) and return the required response. This built in functionality gives you the ability to:

- Generate a web service automatically.
- Publish WSDL to the PeopleSoft repository.
- Publish WSDL to UDDI.
- Synchronize Integration Broker services with the Integration Services Repository (ISR) automatically.

PeopleTools Integration Broker serves as the transport mechanism for services. By mapping your HCM services to Integration Broker, you ensure that your Service Registry conforms to industry standards.

Mapping HCM Services to Integration Broker

This section discusses how to:

- Map an HCM Interface Registry folder to an Integration Broker service.
- Map an HCM service to an Integration Broker service operation.
- Map interface details.
- View service operation security.
- View service operation handlers.
- View service operation routings.

Mapping an HCM Interface Registry Folder to an Integration Broker Service

Initiate the mapping of HCM services to Integration Broker through the HCM Interface Registry. The system permits mapping at only third level folders, which are the lowest sub-categorization of HCM services for products.

To map the HCM Interface Registry metadata for a particular folder to an Integration Broker service:

1. Click the folder name link on the Service Registry page for a third level folder.

The system displays the WSDL for that registry folder.

2. Click the Add to service repository button to add to the service repository.

Provided that you have set up Integration Broker, the system displays details of the service.

Note. The Delete from service repository button is available only when you have mapped the registry folder to the Integration Broker service repository, at which time the Add to service repository button becomes unavailable. This ensures that you can only perform the correct action.

The system automatically generates an Integration Broker service name for the folder. This service name is the IUD for the folder, which is unique string within the HCM Interface Registry and thus guarantees that each service has a unique name. Optionally, you can rename the Integration Broker service to give it a more meaningful name through the Service Administration component (PeopleTools, Integration Broker, Service Utilities, Service Administration). If you rename the service, the system still guarantees a unique name because the Service Alias field contains a copy of the IUD service name. This ensures that the delete process has a means of correlating the service with the HCM Interface Registry.

Note. Do not change the Service Alias field under any circumstances because it is critical to service delete processing.

Mapping an HCM Service to an Integration Broker Service Operation

Each HCM service that is in a registry folder on the Service Registry page is mapped to an Integration Broker service operation and can be found in the service that you have generated for the folder on the Services page (PeopleTools, Integration Broker, Integration Setup, Services). The system uses the name of the HCM service as the name for the service operation, unless that service operation already exists. If the service operation does already exist, an algorithm works within the length constraints of the Service Operation Name field (30 characters). The algorithm replaces the endmost characters with digits until it generates a unique name. The system retrieves the version for the service operation from the HCM Interface Registry.

Mapping Interface Details

The system maps each input and output interface to an integration Broker non-rowset based message, complete with generated schema. The system also assigns the version from the HCM Interface Registry. The base name for the messages is the HCM service name plus the suffix _IM or _OM to designate input or output interfaces, respectively (for example, ADDPOITYPE_IM) .

The system maps outfault interfaces to Integration Broker non-rowset based part messages. This is due to the limitation of Integration Broker having only one fault message per service operation. Therefore, the system creates all outfaults that are associated with a mapped HCM service within an Integration Broker container message. The system indicates outfault messages by using the suffix _FM (for example, ADDPOITYPE_FM).

Viewing Service Operation Security

The system assigns each service operation that you generate the standard HCSPSERVICE permission list. Access the permission list details for the web service on the Web Service Access page (PeopleTools, Integration Broker, Service Operations, General, click the Service Operation Security link).

Viewing Service Operation Handlers

The system assigns a handler to each service operation that you generate. The assigned handler references a generic handler class that is processing the incoming request, and generates the required response. The generic handler is HMCR_FRAMEWORK:IB_Framework:Handlers:IB_SyncRequestHandler. Access handlers for service operations on the Handlers page of the Service Operations component (PeopleTools, Integration Broker, Integration Setup, Service Operations).

Viewing Service Operation Routings

Within the HCM Registry there is no indication of consumers for a given service, so the system does not generate routings during the mapping process. It is up to the development teams to create the necessary routings.

Deleting Mapped Services

Use the Service Registry to delete HCM services that you have mapped to Integration Broker. The system makes available the Delete from service repository button in the Service Registry only for folders that you have already added to the Integration Broker metadata.

The delete process removes the following objects from the Integration Broker metadata:

- WSDL
- Services
- Service operations
- Service operation security
- Service operation handlers
- Service operation routings
- Messages (input, output, fault container, and part)
- Message schemas

Using Integration Broker to Provide Web Services

One main reason for mapping HCM services to Integration Broker is to use Integration Broker's capability of providing web services. You can provide a web service only for service operations that you define as having any-to-local routing. You create these service operations, along with their handlers and routings, in the Service Operations component.

To set up any-to-local routings for service operations:

1. Access the Service Operations component (PeopleTools, Integration Broker, Integration Setup, Service Operations).
2. Select the Generate Any-to-Local check box in the Routing Actions Upon Save area of the General page.
3. Save the component.

The system updates the Any-to-Local value of the Routing Status area to *Exists*.

The system also generates the routing and displays it on the Routings page of the component.

You can publish as a web service any service that has at least one service operation defined as any-to-local.

To publish a qualifying service as a web service:

1. Access the Provide Web Service component (PeopleTools, Integration Broker, Web Services, Provide Web Service) to launch the Provide Web Service Wizard.

The system displays the Select Services page.

2. Search for the service that you wish to publish as a web service.
3. Select that service in the returned search results, and then click the Next button.

The system displays the Select Service Operations page.

4. Select the service operation for the service that you want to publish as a web service, and then click the Next button.

The system displays the View WSDL page.

5. Click the View WSDL link for a service to view the WSDL that the system generated for the service.
6. Return to the View WSDL page and click the Next button.

The system displays the Specify Publishing Options page.

7. Define where to publish the selected services.

Select the Publish to UDDI check box or the WSDL Repository check box to publish the services to the corresponding location.

The system displays the Provide Web Service - Results page.

8. View the WSDL generation log to confirm the results of the wizard.

Chapter 25

Setting Up and Building Organization Charts

This chapter provides an overview of organization charts, lists prerequisites, and discusses how to create organization charts.

Understanding Organization Charts

PeopleSoft Enterprise Human Resources enables you to produce detailed organization charts with PeopleSoft Human Resources data and the Visio Organization Charting Wizard. To build organization charts, you decide whether to map your organization based on positions or on departments, using one of your PeopleSoft Human Resources Position or Department trees, then run the Organization Chart SQR from PeopleSoft Process Scheduler. Visio does the rest. Formatting options in the Visio Organization Charting Wizard enable you to easily create detailed charts of only one department or your entire organization.

Prerequisites

Before you can create organization charts, you must:

- Make sure that Visio is installed on your client.

Visio is not delivered with PeopleSoft Human Resources; you must purchase and install Visio on the client computers separately. For more information about installing Visio, see your Visio documentation.

- Select Visio as your Organization Chart interface on the Third-Party/System page in the Installation Table component (INSTALLATION_TBL).
- Make sure that organization and person data exists in PeopleSoft Human Resources before you start working with the Organization Charting Interface pages.

Creating Organization Charts

This section provides an overview of the process and discusses how to:

- Create an organization chart.
- Copy the organization chart file to the client.

- Review the organization chart.
- Use the Visio Organization Chart Wizard.

Understanding the Process

To create organization charts that are based on your human resources data:

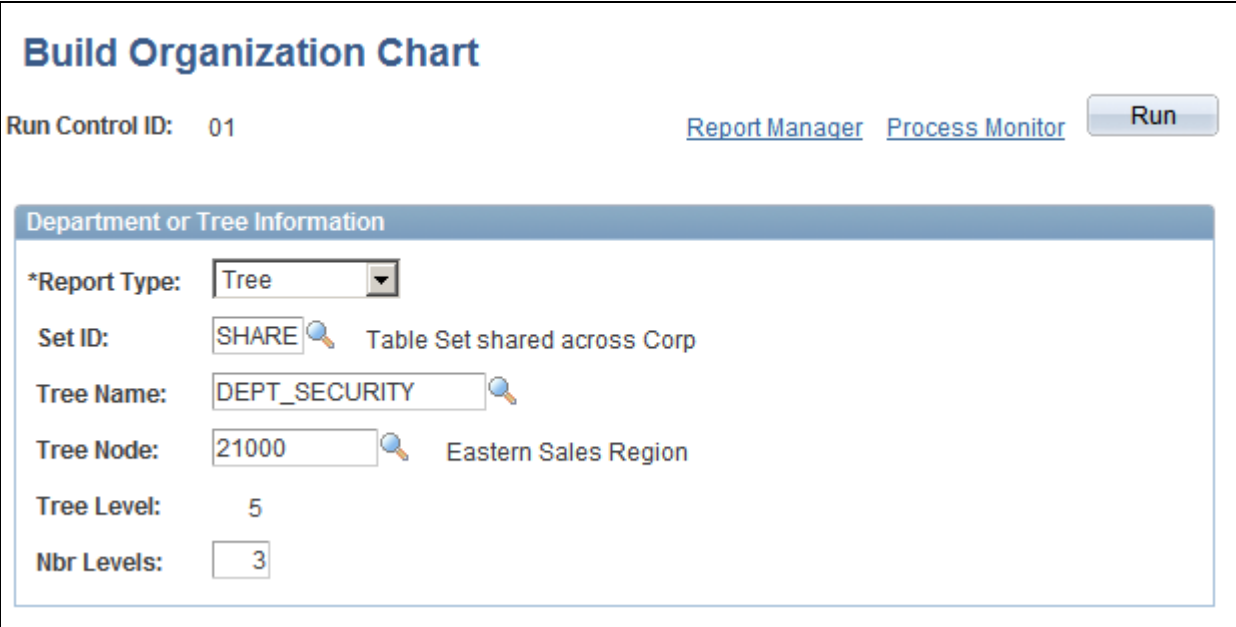
- Run the Organization Chart SQR from the Organization Chart page.
- Copy the resulting file to the client.
- Review the organization chart information gathered by the Organization Chart SQR.
- Start Visio and run the Vision Chart Wizard.

Page Used to Create an Organization Chart

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Build Organization Chart	ORGCHART_PNL	Organizational Development, Position Management, Create Organization Structure, Build Organization Chart, Build Organization Chart	Create an organization chart based on PeopleSoft Human Resources system trees.

Creating an Organization Chart

Access the Build Organization Chart page (Organizational Development, Position Management, Create Organization Structure, Build Organization Chart, Build Organization Chart).



Build Organization Chart

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

Department or Tree Information

*Report Type:

Set ID: Table Set shared across Corp

Tree Name:

Tree Node: Eastern Sales Region

Tree Level:

Nbr Levels:

Build Organization Chart page

Report Type

Select a report type. Options are:

- *Department*

Builds your chart based on a single department that you select.

- *Tree*

Builds your tree based on one of your Human Resources system trees. Using this option, you can include multiple departments in your chart.

Note. You can build your organization chart from active department and position trees only. You must also have security access to the trees and departments that you want to include in your organization chart.

Building Your Chart Using Departments

If you select Department in the Report Type field, then the Set ID and Department fields appear.

Department

Enter the department that you want to include in your organization chart from the list of department IDs in the setID. You build your organization chart one department at a time. (You create the department codes when you define departments in the Department Table.)

Run

Click Run if you're building your chart using the Department report type. PeopleSoft Process Scheduler runs the Organization Chart SQR.

Building Your Chart Using Trees

If you selected a report type of *Tree*, the SetID, Tree Name, Tree Node, and #Levels (number of levels) fields appear:

1. Select a setID from the list of values.
2. Select a tree name from the list of trees.

Selecting Tree Nodes and Levels to Include in Your Chart

Tree Node	Select the level of the tree on which you want the organization chart to start. For example, if you're using a department tree, select the department.
Tree Level	The system enters the tree level of the tree node that you selected.
Nbr Levels (number of levels)	Specify the number of levels to include in the tree. For example, if you begin the chart at tree level5 and you specify the number of levels as3, the organization chart includes levels 5 though 7 of your tree.

See Also

Chapter 5, "Setting Up and Administering HRMS Security," Creating and Modifying Security Trees, page 85

Copying the Organization Chart File to the Client

The Organization Chart SQR creates the ORGCHART.TXT file and stores it in the application server. To create an organization chart using Visio, you need to copy the ORGCHART.TXT file to a client computer. You will run Visio and create the organization chart on the client.

To copy the ORGCHART.TXT file:

1. Access the Process Monitor – Process List page (PMN_PRCSLIST) (PeopleTools, Process Scheduler, Process Monitor).
2. Locate the organization chart process and click the associated Details link.
3. Click the View Log/Trace link.
4. Click the ORGCHART.TXT link to open the file.
5. Select File, Save As and save to the client.

Reviewing the Organization Chart

To review the results of your Organization Chart SQR process in the ORGCHART.TXT file, use a text editor to open and review the file. The file contains the following data:

- Unique ID
- Name
- Reports To
- Position
- Department
- Telephone

Following is an example of the ORCHART.TXT file:

```

Unique_ID,Name,Reports_To,Position,Department,Telephone,Master_Shape
10100,Simon Schumacher,,Unknown,Office of the President,No work phone
8501,William D. Bennett,Simon Schumacher,Unknown,Office of the President
8600,Jan Elias,Simon Schumacher,Unknown,Office of the President
8661,Winona Cherrier,Simon Schumacher,Unknown,Office of the President
G011,Steven Sherwood,Simon Schumacher,Unknown,Office of the President
I002,Marc Campenhout,Simon Schumacher,Unknown,Office of the President
I003,Irene Dahling,Simon Schumacher,Unknown,Office of the President
LT007,Bartholomew Rossalini,Simon Schumacher,Unknown,Office of the President
LT011,Gretchen Wagner,Simon Schumacher,Unknown,Office of the President
PA001,Robert Jordan,Simon Schumacher,Unknown,Office of the President
PA003,Kenneth Kidd,Simon Schumacher,Unknown,Office of the President
PA005,John Smith,Simon Schumacher,Unknown,Office of the President
PA006,Katherine Bronte,Simon Schumacher,Unknown,Office of the President
PA007,Leslie Fletcher,Simon Schumacher,Unknown,Office of the President
PA008,Suzanne Drew,Simon Schumacher,Unknown,Office of the President
PA009,Deidre Reagan,Simon Schumacher,Unknown,Office of the President
PA010,Samuel Alomar,Simon Schumacher,Unknown,Office of the President
PA011,John Barfield,Simon Schumacher,Unknown,Office of the President
PA012,Alton Cone,Simon Schumacher,Unknown,Office of the President
PA013,Anna Bell,Simon Schumacher,Unknown,Office of the President
PA014,Jennifer Gruber,Simon Schumacher,Unknown,Office of the President

```

Example of ORGCHART.TXT file

Using the Visio Organization Chart Wizard

Open Visio and use the Organization Chart Wizard to create your organization chart automatically.

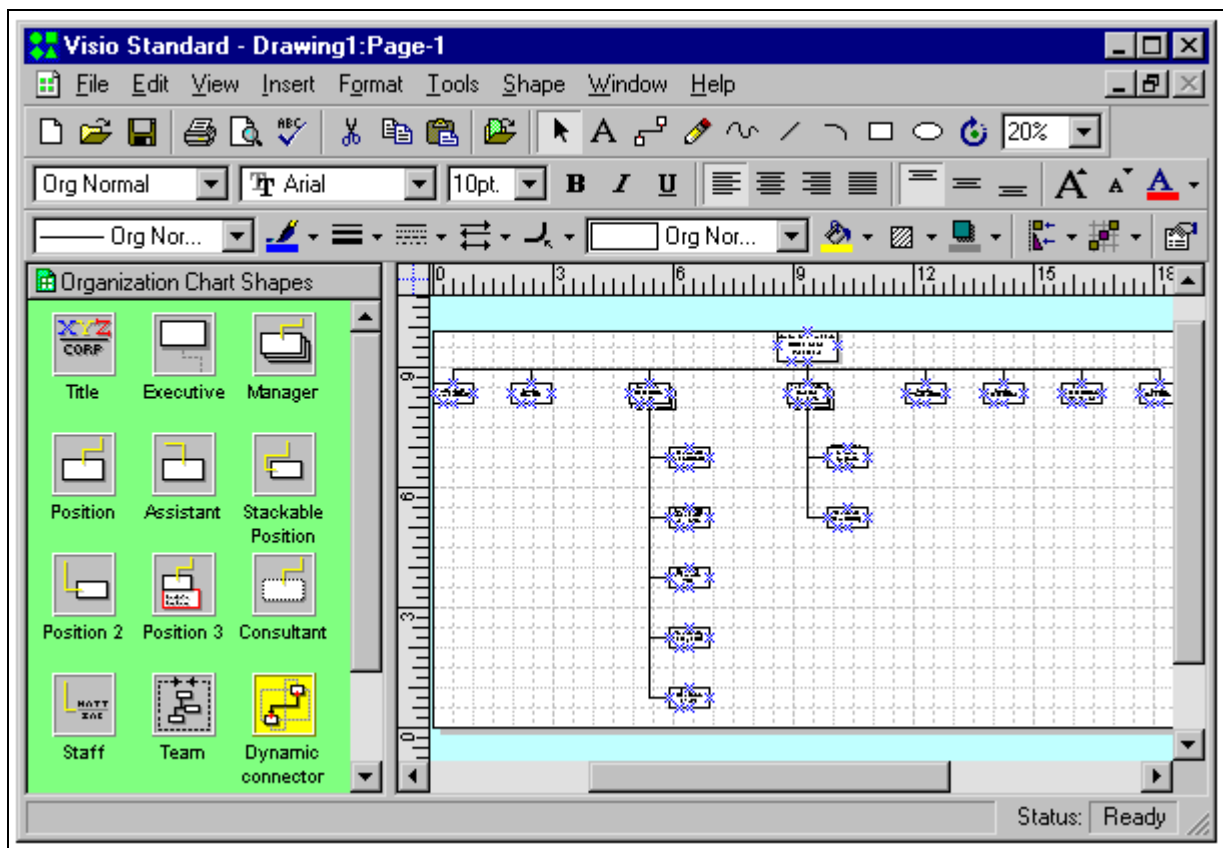
Note. These instructions are for Visio 2000. The Organization Chart Wizard may operate slightly differently for other Visio versions.

To run the Organization Chart Wizard:

1. In Visio, select File, New, Organization Chart, Organization Chart Wizard.

2. In the window that appears, select the option *Information that's already stored in a file or database* and click Next.
3. On the next window select the option *A text, Org Plus (*.txt), or Microsoft Excel file* and click Next.
4. On the next window enter the location on the client that contains your organization information (where you saved the ORGCHART.TXT file), for example *C:\TEMP\ORGCHART.TXT* and click Next.
5. Select *Name* for the Name field, *Reports_To* for the Reports to field, and *<none>* for the First Name (optional) field and click Next.
6. Select the data that you want displayed in the chart shapes (for example *Name* for the First Line and *Position* for the Second line) and click Next.
7. Add other fields contained in the ORGCHART.TXT file to the Org Chart by selecting them from the Data file columns and adding them to the Custom Property fields column. Click Next.
8. Select *I want the wizard to automatically break my organization chart across pages* and click Finish.

Following is an example of the Visio page that you see when your organization chart is complete:



Example of a department organization chart in Visio

Note. For more information about editing and printing your organization chart in Visio, see your Visio documentation.

Chapter 26

Setting Up and Processing Mass Updates

This chapter provides an overview of mass update processing and discusses how to:

- Configure the Transaction Processor for mass updates.
- Set up mass update definitions.
- Create mass updates.
- Generate the Mass Update report.
- Manage mass updates.
- Perform mass updates.
- Delete pending mass updates.

Note. PeopleSoft no longer supports HRMS-specific Mass Change templates. We have left the templates in the database for your convenience, but recommend that you use the Mass Update feature.

See Also

Enterprise PeopleTools PeopleBooks: Security Administration

Understanding Mass Update Processing

This section discusses:

- Mass update architecture.
- Steps for a mass update run.
- Tips for a successful mass update run.

Mass Update Architecture

The Mass Update feature enables you to make changes to the data of large groups of people. For example, you can use the Mass Update feature to perform company-wide compensation increases, department transfers, job code changes, labor agreement changes, and reorganizations.

The Mass Update feature consists of the following modules:

- *Mass Update Manager:* This is the front-end module that provides the user interfaces for the Mass Update feature. It consists of:
 - The Define Mass Update component (MU_SETUP), for setting up mass update definitions.
 - The Create Mass Updates component (RUNCTL_MU_CREATE) and related Application Engine (AE) process for generating mass update transactions.
 - The Report Mass Updates component (RUNCTL_MU_PRINT) and related Structured Query Report (SQR). report for reviewing and printing lists of mass update transactions.
 - The Manage Mass Updates component (MU_MANAGE) for reviewing or previewing mass update transactions, managing statuses, and processing mass update transactions individually online.
 - The Execute Mass Update component (RUNCTL_MU_EXECUTE) and related AE process for running mass updates in batch.
 - The Delete Mass Updates component (RUNCTL_MU_DELETE) and related AE process for deleting pending mass update transactions.
- *Transaction Processor:* This is a back-end module that consists of the Configure Processor component for setting up and managing system data that is available for mass updates and an application class that provides access to transaction processing functionality. The role of the Transaction Processor application class is to provide access to services within the Services Oriented Architecture (SOA) to read (select and write, or update, information. Each transaction is an XML message that contains the list of elements that are involved in the update for a specific employee and employee record combination. The Transaction Processor application class interprets this XML message, provides access to the correct service, and returns acknowledgements and any exceptions to the online or batch process that calls it.
- *Execution Manager:* This is a back-end module that is a mechanism in the batch mass update process to manage and monitor parallel processing through spawning. *Spawning* is a method of simultaneously running multiple instances of a child process by a parent process. The Execution Manager enables you to run multiple instances of the batch mass update process and run these instances in parallel to improve performance.

Note. The Mass Update framework relies on SOA framework.

Steps for a Mass Update Run

To process mass updates:

1. Set up a mass update definition through the Define Mass Update component.
2. Run the mass-update selection phase and create transactions for mass update through the Create Mass Updates page (which is part of the Mass Update Manager module.)
3. Review and update transactions.

You can review and update transactions online through the Manage Mass Updates component.

You can also generate a report to review transactions from the Report Mass Updates page.

Both components are part of the Mass Update Manager module.

4. Process transactions using the Transaction Processor.

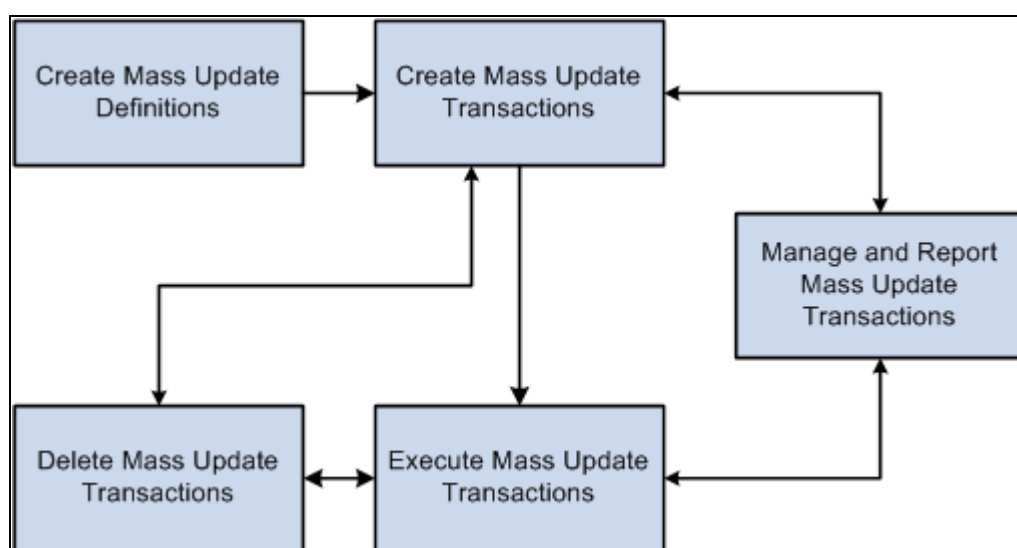
You can process transactions one at a time from the Manage Mass Updates component, which is part of the Mass Update manager module.

Or you can process transactions in batch through the Execute mass Updates page, which is part of the Execution Manager module.

5. (Optional) If necessary, cancel transactions through the Manage Mass Updates component, which is part of the Mass Update Manager.
6. (Optional) If necessary, delete transactions one at a time through the Manage Mass Updates component, or delete transactions in batch through the Delete Mass Updates page.

Both components are part of the Mass Update Manager module.

The following diagram illustrates this process flow of mass update processing:



Mass update process flow

Tips for a Successful Mass Update Run

For a successful mass update:

- Test your update on a small group first.
- Use the correction option only if you are certain that you want to override data.

If possible, add a new effective-dated row, instead.

- Familiarize yourself with the online transaction to understand the rules governing the component before trying to automate it using the Mass Update process. When you update a component using Mass Update, it is governed by the same rules (such as defaulting and required fields) as when you access the component online.

- Create several simple Mass Update IDs that you can use in combination instead of trying to create a complicated one that changes everything.

In addition to being more flexible, this approach facilitates identifying the source of errors.

Important! The Mass Update feature uses services to update data. Services run all of the business logic that is associated with a component, which ensures that the components function correctly and that the data is consistent. However, updating the data in this manner, while more complete, is slower than some other methods (such as a SQL update). When you run a mass update, take steps to improve performance, such as limiting the size of the transaction set, performing the update at night when server traffic is low, or both.

Configuring the Transaction Processor for Mass Updates

Use the Configure Processor component (MU_TP_SETUP) to define the sections and elements that are available for mass updates.

This section provides an overview of Transaction Processor configuration and discusses how to:

- Set up the Transaction Processor for mass updates.
- Define prerequisite elements for mass update definitions.

Understanding Transaction Processor Configuration

The Transaction Processor is an Application Class that can process changes in the application by means of services, based on a transaction that contains the details of the change. The system uses the Transaction Processor to perform mass updates either online through the Manage Mass Updates component or in batch through the Execute Mass Update component.

Mass update processing relies on the configuration of the Transaction Processor. To perform this configuration, you must use the Configure Processor component. This component is intended for technical users with a high level of experience. PeopleSoft provides many predefined sections within the Configure Processor component for performing mass updates.

The Transaction Processor setup defines the sections that are available for a mass update, the service that manages the update, and the list of elements that are available for mass update within the section. You can then use the Define Mass Update component to create mass update definitions. During mass update processing, the Mass Update Manager triggers the Transaction Processor to process mass update transactions using the section, elements, and values that you define on the applicable mass update definition. For each section that the Transaction Processor encounters, it refers to the Transaction Processor setup for the right service, and then triggers the service with the values that are defined in the transaction.

Note. If you add Job Profile Manager (JPM) catalog types to the system, then to perform mass updates to the newly added JPM data, you must replicate those catalog types in the Configure Processor component.

Pages Used to Configure the Transaction Processor for Mass Updates

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Configure Processor	MU_TP_SETUP	Workforce Administration, Collective Processes, Mass Update, Configure Processor, Configure Processor	Define the sections that are available for a mass update, the service that manages the update, and the list of elements that are available for mass update within the section. You also define prompt and prerequisite information that the system uses when you create mass update definitions through the Define Mass Updates component.
Configure Processor - Prerequisites	MU_TP_SETUP_PRE	Click the Details icon on the Configure Processor page.	Define the prerequisites elements that you must define as part of a mass update definition for the given section. These prerequisites establish the relationships between elements that are available for mass update transactions.

Setting Up the Transaction Processor for Mass Updates

Access the Configure Processor page (Workforce Administration, Collective Processes, Mass Update, Configure Processor, Configure Processor).

Configure Processor

Sections

Find | View All First 1 of 1 Last

Section:

AREA STUDY

Description:

Areas of Study

Level:

Person

☒ Allow Copy Forward

Service:

MassUpdatePersonProfile

Version:

1.0

Elements

Customize | Find | View All First 1-5 of 5 Last

Element	Description	Prerequisites Defined	Details	Prompt	Edit Record or Field
AVERAGE_GRADE	Grade	☒			
EFF_STATUS	Status	☒		Translate	EFF_STATUS
JPM_ADHOC_DESCR	Area Of Study	☒			
JPM_DATE_5	Date Acquired	☒		Date	
JPM_TEXT254_1	Area Of Study	☒			

Configure Processor page

Sections

Section Enter the name of the section. A section is a functional group of elements and is defined within a service.

Description Enter the description of the section. When you are defining a mass update on the define Mass Update component, the system uses the description as a prompt value for the Section field.

Level Select whether the Component Interface is based on an *Employee Record* number or a *Person*. By default, the system selects the *Person* value.

When the Mass Update Manager module generates mass updates for a person, it uses the selected level to ensure that it generates these update transactions for the same person once only.

The Transaction Processor module uses the selected level to provide access to the service that contains the correct key values.

Allow Copy Forward Select to make the Copy Forward option available for the section or service in the Define Mass Update component.

Service	Enter the service that the system uses to manage the update for the corresponding section. The service that you specify provides all the controls and defaults for mass updates that involve the section; no processing logic is within the setup itself. PeopleSoft Enterprise Human Resources delivers the following services for use with mass update processing: Job Data (which includes specifics for compensations and labor agreements), Person Data, Job Profile Manager, and Military Approval Tracking. Each service is defined using data types and uses the same base class. Each data type defines the elements that are available for the service. To manage services, use the Service Registry component. Note. You can also build your own services and incorporate them into the Mass Update feature. To have the mass update process access data beyond the delivered services, you must define a service to manage the specific requirements, register the service, and then update the Transaction Processor setup.
Version	Enter the version of the specified service.
Elements	
Element	Enter the object name of the element or data type that you want to make available for a mass update that uses this section. You can enter as a value any simple data type that is defined in the service. The elements that you list provide the information that is available for a mass update.
Description	Enter the description of the element. When you are defining a mass update on the define Mass Update component, the system uses the description as a prompt value for the Element field.
Prerequisites Defined	The system automatically selects this check box whenever you have defined prerequisites for the element.
Details	Click this button to access the Prerequisites page, where you can define prerequisites for the corresponding element.

Prompt

Select how you want to define the prompt for the element. The prompt that you select determines how you can define the value of the section and element combination on the Define Mass Updates page. Possible values are:

- *Action*: When processing a mass update for this section and element combination, the system performs the specific action within the application that the element defines. For example, an element might perform the action of pressing a button or setting a default value (in that case, there is no prompt).
- *Checkbox*: When you are defining a mass update for this section / element combination, the system displays a Boolean Value check box.
- *Date*: When you are defining a mass update for this section / element combination, the system displays a date field.
- *Numeric*: When defining a mass update for this section / element combination, the system displays a Numeric Value field.
- *Record*: When defining a mass update for this section / element combination, the system displays a Character Value field that prompts against the record that you specify in the *Edit Record or Field* field.
- *Translate*: When defining a mass update for this section / element combination, the system displays a Character Value field that prompts against the field that you specify in the *Edit Record or Field* field.

Edit Record or Field

If you select to prompt for the element with a record, select the record. If you select to prompt for the element with a translate value, select the field name.

Defining Prerequisite Elements for Mass Update Definitions

Access the Configure Processor - Prerequisites page (click the Details icon on the Configure Processor page).

Prerequisites

Section: AREA STUDY Areas of Study
Element: AVERAGE_GRADE Grade

Prerequisites Elements				
Section	Element Prerequisite	Description	Prompt Field	Sequence
AREA STUDY	JPM_CAT_ITEM_ID			1

OK Cancel

Configure Processor - Prerequisites page

Section Prerequisite, Element Prerequisite, and Description	Select the section and element that is a prerequisite to this section and element when defining a mass update. The system prompts you to select from the sections that you have defined in this component and the elements that you have defined for the selected section prerequisite. The system displays the name of the element prerequisite that you select.
Prompt Field	Select the field that you want to use to prompt for the prerequisite element. This field is used internally in order to identify which field of the prompt record will be populated with the value of the prerequisite field. For instance, the element Work Location / Department has the element Work Location / Business Unit as prerequisite. Then, the field SETID will be populated with the value of Business Unit when used in the prompt record DEPT_TBL.
Sequence	Enter the sequence in which you need to enter the prerequisites when defining a mass update.

Setting Up Mass Update Definitions

To set up the mass update definitions to process mass updates, use the Define Mass Update component (MU_SETUP).

This section provides an overview of mass update definitions and discusses how to:

- Define generic information for mass updates.
- Define common data changes for mass updates.
- Define additional data changes for mass updates.

Understanding Mass Update Definitions

Mass update definitions define the sets of data changes and the selected populations that the Mass Update process uses to run a mass update for a given definition. After you initiate the Mass Update process for a mass update definition, you can no longer modify the definition. Use the Define Mass Update component to define the mass update definitions. The Define Mass Update component is part of the Mass Update Manager module.

You should review mass update definitions carefully to avoid population overlap. The Mass Update process manages additional changes in sequence, processing each employee and record number combination only once. Each change overrides the previous one for the same employee and record number. Therefore, only one combination of change data within a mass update definition applies to an employee and employee record number combination during one mass update.

For example, assume that you want to change the Department value from *D1* to *D2* and also change the Location value to *L3* for all departments with *D2* value. If you define on the Additional Changes page within a single mass update definition to update the department element value to *D2* and the *D2* departments to a location value of *L3*, the Mass Update process will first move employees in department *D1* to department *D2* and then move the employees who are already in department *D2* before the update to location *L3*. The Employees process will not change the location of the employees with the department change. If you want the location change to apply to the whole population, you must define two mass update definitions, one for the department change and one for the location change. You must then apply the second mass update only after the first one finishes.

Pages Used to Set Up Mass Update Definitions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define MU	MU_SETUP	Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Define MU	Select the generic information for the mass update definition. The options that you select apply to all updates that you process for this definition.
Common Changes	MU_SETUP_CHANGES	Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Common Changes	Define the content of the mass update by specifying the population selection criteria and common data changes. To create a valid mass update definition, you must define at least one row of data on either the Common Changes page or the Additional Changes page.
Additional Changes	MU_SETUP_ADD_CHG	Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Additional Changes	Define the content of the mass update for each additional population that you include in the mass update definition.
Define Mass Update - Summary	MU_SETUP_SUMMARY	Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Summary	Review a detailed summary of all of the data changes that are included in the mass update definition.

Defining Generic Information for Mass Updates

Access the Define MU page (Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Define MU).

Define MU Common Changes Additional Changes Summary

Mass Update ID: K00003

*Description: Labor Agreement K00001 & Update K00002

Short Desc: Labor

Status: New

Copy From:

Process Mode Options

☒ Add a New Effective Date ☐ Correct Current Information

*Reference Date: 01/01/2006

☒ Include Eligible Future Rows

Define MU page

Mass Update ID When adding a new mass update definition, enter a unique ID for the definition.

Description and Short Desc (short description) Enter a description and short description of the mass update definition.

Status The system displays the status of the mass update definition. Possible values are:

- *New*: The mass update definition has been created and is available for the selection phase.
- *Initiated*: The mass update definition has been included in a run of the selection phase. You can run the selection phases multiple times before running the update phase.
- *In Progress*: The mass update definition has been included in a run of the update process phase. You can run the update phase multiple times before running the completion phase.
- *Closed*: The mass update definition has been included in a completion phase and closed. You cannot run any further mass update processing.

Note. When you initiate the update phase of the mass update processing, the mass update definition becomes display only.

Copy From

Select another mass update definition to use as the basis for the definition that you are defining. If you confirm the copy of the mass update definition, the system populates the Define Mass Update component with data from the other definition.

When you copy a mass update definition, the system verifies whether the group builds and employees that are in the original definition are available for you to use. If not, the system issues a warning and removes the unavailable group builds and employees from the new definition.

Note. The system overwrites all existing data that you have already included in the new definition that you are creating.

Process Mode Options

Use this group box to specify the general processing options for the mass update definition. Indicate whether you want the process to correct the current information or add a new effective-dated row. Also indicate how you want the process to handle eligible future-dated rows.

Add a New Effective Date

Select to insert a new effective-dated row using the Reference Date value as the new effective date. If a record already exists with this effective date and the record contains a sequence number field, the system inserts a row with the date and a new sequence number, otherwise it overwrites data. If the record is not organized by effective sequence, overwrites data. This option inserts new information and does not override previous data.

Correct Current Information

Select to change incorrect data and override information in the person's records. The system corrects the record that is or was effective as of the Reference Date value that you enter.

Reference Date

Enter the data that you want the mass update processes to use when inserting a new effective-dated row or correcting an existing row.

Include Eligible Future Rows

Use this option when you want to update data of employees that are eligible for the change (as defined in population selection criteria) after the reference date. This option (similar to retroactivity) can be used in conjunction with the carry forward option available at element level.

Defining Common Data Changes for Mass Updates

Access the Common Changes page (Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Common Changes).

Define MU		Common Changes		Additional Changes		Summary	
Mass Update ID:		K00003					
Description:		Labor Agreement K00001 & Update K00002					
Population Selection Criteria				Customize Find View All First 1 of 1 Last			
*Select By		Regulatory Region	Labor Agreement	*Process			
Labor Agreement		USA	K00001	Include		+ -	
▼ Individuals				Customize Find View All First 1-2 of 2 Last			
*Empl ID	Empl Record	Name		*Process			
KU0059	0	Vicki Zinn		Exclude		+ -	
KU0068	0	Marc Kessler		Exclude		+ -	
Data Changes				Customize Find View All First 1-4 of 4 Last			
*Seq Nbr	*Section	*Element	Character Value	Copy Forward			
1	Job Data	Action	DTA			+ -	
2	Job Data	Reason Code	CDP			+ -	
3	Work Location	Regulatory Region	USA	☒		+ -	
4	Job Labor	Labor Agreement	K00002	☒		+ -	

Common Changes page

Population Selection Criteria

Use this group box to define the population selection criteria for the mass update. For each row of criteria that you define, you can select to include or exclude the associated employee population. You can combine multiple rows of criteria to refine the population selection.

Select By

Select how you want the system to select the employee population to include or exclude for the mass update.

When you make a selection here, the system displays related fields for you to specify which value you want the process to update. For example, if you selected *Group ID*, the system displays the Group ID field. The update process will select all people with the group ID that you specify.

Note. To set up mass update definitions by group, you must grant group security to the Define Mass Update component. To set up a mass update definition by department (this is also applicable for other criteria, such as business unit, company, etc... the row-level security defined in the database is applied for any selection), the user must have access to the selected department.

Boolean Value

If applicable, select this check box to indicate the Boolean value for the selected population.

From Date and To Date If applicable, enter the date range for the selected population.

Business Unit	If applicable, select the business unit to which the employees in the selected population belong.
Character Value	If applicable, enter the character value for the selected population.
Regulatory Region	If applicable, select the regulatory region for the selected population.
Labor Agreement	If applicable, select the labor agreement for the selected population.
Military Service	If applicable, select the military service for the selected population.
Process	Select whether to include or exclude the selected population from the mass update.

Individuals

Use this group box to include or exclude specific employees from the mass update.

Empl ID (employee ID)	Select the employee that you want to include or exclude from the mass update.
Empl Record (employee record number)	Select the record number of the employee that you want to include or exclude from the mass update.
Name	The system displays the name of the selected employee.
Process	Select whether to include or exclude the selected employee from the mass update.

Data Changes

Use this group box to define which fields to update and with what values. You must enter at least one row on this page or the Additional Changes page.

You should include an action and reason code value when making changes to job data. If you do not specify an action and action reason for inserting a new effective-dated row in a person's Job or Personal Data record, the Mass Update process inserts the following values in the new record:

<i>Change Type</i>	<i>Action</i>	<i>Action Reason</i>
Job Data Change	Data Change (DTA)	None

Seq Nbr (sequence number)

Enter a numeric value to indicate the order in which you want to process the mass updates. By default, the system sets the first row to one and incrementally increases the value by one for each additional row that you insert.

Some elements cannot be updated without your specifying several other related elements in the same mass update ID. For example, to specify a Location on the JOB record, you must first specify the appropriate business unit. The Business Unit element should be processed first and should have an earlier sequence number than Location.

Elements that are managed with a key, such as phone information, also require that you use a sequence number to ensure that the key is updated first. For example, before the mass update can update a phone number, it needs to update the phone type. When setting up the mass update, ensure that phone type is an earlier sequence number than the phone number.

The system warns you if you need to add a related or key field.

Note. Be careful to sequence fields appropriately. Remember that the same constraints (such as defaulting and required fields) that govern a component when you access it online are also active when you update them with Mass Update.

Section

Select the section that contains the element for which you want to perform a mass update. Define the section and element combinations that are available for mass updates as part of the Transaction Processor setup on the Configure Processor page.

Element

Select the element within the selected section for which you want to perform a mass update data change. An element refers to a field on a page. Define the section and element combinations that are available for mass updates as part of the Transaction Processor setup on the Configure Processor page.

Some elements require prerequisites as defined on the Configure Processor page. You must select prerequisite elements first. If you select an element that requires a prerequisite element and you have not entered a data change for the prerequisites, the system alerts you to the missing prerequisite.

Character Value

Specify the new value to which you want to change the selected element. The system displays different value fields according to the type of field for the selected element.

Copy Forward

Select to have the Mass Update process update all existing future effective-dated rows in addition to the effective-dated row that it is adding or correcting. A future effective-dated row is a row that has an effective date that is later than the reference date that you specify on the Define MU page. This option is applicable only to data that is effective-dated.

See Also

[Chapter 5, "Setting Up and Administering HRMS Security," page 39](#)

Defining Additional Data Changes for Mass Updates

Access the Additional Changes page (Workforce Administration, Collective Processes, Mass Update, Define Mass Update, Additional Changes).

Define MU **Common Changes** **Additional Changes** **Summary**

Mass Update ID: K00003
Description: Labor Agreement K00001 & Update K00002

Additional Changes Find | View All First 1 of 2 Last

*Change Number: 1

Population Selection Criteria Customize | Find | View All First 1 of 1 Last

*Population Selection Criteria	Business Unit	Character Value	*Process
Location	GBIBU	KUDE00	Include

Individuals Customize | Find | View All First 1 of 1 Last

*Empl ID	Empl Record	Name	*Process
	0		Include

Data Changes Customize | Find | View All First 1 of 1 Last

*Seq Nbr	*Section	*Element	Character Value	Copy Forward
1	Job Labor	Labor Facility ID	K00002	☒

Additional Changes page

Additional changes are combined with common Changes and several combinations can be defined. While several additional changes can be entered, none of them is mandatory.

Change Number

Enter in the Change Number field the order in which you want to process mass update changes for additional populations within the mass update definition. Click the Add a new row button to insert information for data changes to additional populations. The system automatically sets the first row to 1 and increments the value by 1 for each additional row.

Note. The remaining fields on this page are the same as the fields on the Common Changes page.

Creating Mass Updates

This section provides an overview of mass update transaction creation and discusses how to generate mass update transactions.

Understanding Mass Updates Creation

Use the Create Mass Updates component to perform the selection phase of mass update processing by running the Mass Update Selection Application Engine process (HR_MASS_PREP). The main role of this process is to define populations and generate transactions for each person (emplID and employee record number combination) in the population based on mass update definitions. The process assigns each transaction a unique transaction ID during the generation of transactions. It creates the content of the transactions using XML language and stores the transactions in a table that is keyed by transaction ID. Each transaction contains one set of changes for a single person and employee record number.

Note. The process shares this run control page with other mass update processing components.

Page Used to Create Mass Updates

Page Name	Definition Name	Navigation	Usage
Create Mass Updates	RUNCTL_MU	Workforce Administration, Collective Processes, Mass Update, Create Mass Updates, Create Mass Updates	Generate mass update transactions for selected mass update definitions.

Generating Mass Updates

Access the Create Mass Updates page (Workforce Administration, Collective Processes, Mass Update, Create Mass Updates, Create Mass Updates).

Create Mass Updates

Run Control ID: DOC [Report Manager](#) [Process Monitor](#)

*Seq	*Mass Update ID	Description	Mass Update Status
1	HXLAMU5	Labor Agreement Mass Update Definition	Initiated

Create Mass Updates page

Mass Updates

Enter one or more mass update definitions into the grid.

Seq (sequence)	Enter the sequence in which you want the process to generate mass update transactions for the mass update definitions that you specify. By default, the system sets the first row to <i>1</i> and increments the sequence by 1 for each additional row that you add.
	Important! If you are creating transactions for two or more mass update definitions at the same time, be sure to avoid population overlap between the mass update definitions.
Mass Update ID and Description	Select the mass update definition for which you want to generate mass update transactions. The system displays the description of the selected mass update definition.
Mass Update Status	The system displays the processing status of the selected mass update definition. Possible values are <i>New, Initiated, In Progress</i> , and <i>Closed</i> . See Setting Up Mass Update Definitions, Defining Generic Information For Mass Updates

Generating the Mass Update Report

This section discusses how to generate the Mass Update report.

Page Used to Generate the Mass Update Report

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Report Mass Updates	RUNCTL_MU	Workforce Administration, Collective Processes, Mass Update, Report Mass Updates, Report Mass Updates	Generate a report to review or preview transactions that are associated with specific mass update definitions.

Generating the Mass Update Report

Access the Report Mass Updates page (Workforce Administration, Collective Processes, Mass Update, Report Mass Updates, Report Mass Updates).

Report Mass Updates

Run Control ID: DOC

Report Manager

Process Monitor

Run

Language: English

Transaction Status:

Print Messages

Mass Updates				
*Seq	*Mass Update ID	Description	Mass Update Status	
1	HXLAMU5	Labor Agreement Mass Update Definition	Initiated	

Report Mass Updates page

The Mass Update SQR report (HRMASS) includes the mass update ID, description, and status. It also includes the total transactions per status and transaction details. This report is part of the Mass Update Manager module. You can run this report anytime before, during, or after the processing of the mass update transactions. When it is run before you process the mass update transactions, you can use this report as a preview.

- Language

Select the language in which you want to print the report.
- Transaction Status

Select the status of the mass update transactions that you want to include in the report. Possible statuses are *Cancel*, *Failure*, *Ready*, *Success*, and *Warning*.
- Print Messages

Select to include the details of messages and exceptions in the report.

Mass Updates

Use this group box to enter one or more mass update definitions to include in the report.

- Seq (sequence)

Indicate the order in which you want the mass update definitions to appear on the report. By default, this sets the value to 1 for the first row and increments the value by 1 for each additional row.
- Mass Update ID and Description

Select the mass update definitions that you want to include in the report. The system displays the description of the selected definitions.
- Mass Update Status

The system displays the status of the selected mass update definitions.

Managing Mass Updates

This section discusses how to manage mass updates.

Pages Used to Manage Mass Updates

Page Name	Definition Name	Navigation	Usage
Manage Mass Updates	MU_MANAGE	Workforce Administration, Collective Processes, Mass Update, Manage Mass Updates, Manage Mass Updates	Monitor the running instances of the Execution Manager module and manage generated mass update transactions. You can view transaction details, change their statuses, and perform the update phase of mass updates by processing transactions individually online.
Transaction Details	MU_MANAGE_DETAIL_S	Click the Details button for a row on the Manage Mass Updates page.	Review details of the mass update transactions. This page includes high-level details of the transaction as well as information about population selection criteria, changes, eligibility, messages, and exceptions.

Managing Mass Updates

Access the Manage Mass Updates page (Workforce Administration, Collective Processes, Mass Update, Manage Mass Updates, Manage Mass Updates).

Manage Mass Updates



▼ Running Instances					
Process Instance	Run Control ID	Mass Update ID	Run Status	Pending Transactions	Processed Transactions
				0	0

Search Criteria

Mass Update ID: 

Section: ▼

Element: ▼

Empl ID: 

Transaction Status: ▼

Search

Manage Mass Updates page (1 of 2)

▼ Total Transactions per Status							
Mass Update ID	Transaction Status					Count	
HXLAMU10	Ready					5	
HXLAMU5	Ready					1	

1 to 6 on 6

Mass Update Transactions							
Mass Update	Person ID	Empl Record	Name	*Transaction Status	Details	Execute	
HXLAMU10	HXLAMU8	0	James Jackson	Ready ▼		Execute	—
HXLAMU10	HXRR020	0	Chris Schmidt	Ready ▼		Execute	—
HXLAMU10	HXUH228	0	Smokey Bingham	Ready ▼		Execute	—
HXLAMU10	HXUH229	0	Wai Wallion	Ready ▼		Execute	—
HXLAMU10	SA0031	0	Margaret Simpson	Ready ▼		Execute	—
HXLAMU5	HXLAMU13	0	Jansen Lombert	Ready ▼		Execute	—

Manage Mass Updates page (2 of 2)



(refresh)

Click to reload the data on the page.

Running Instances

Use this group box to view details of the current running instances for mass update processing.

Process Instance Displays the process instance number for the corresponding instance.

Run Control ID The run control ID that the instance is processing.

Mass Update ID The mass update definition that the instance is processing.

Run Status The run status of the process instance.

Pending Transactions The number of mass update transactions that are assigned to the process instance but not yet processed.

Processed Transactions The number of mass update transactions that have been processed by the process instances. This includes processed transactions with errors.

Search Criteria

Use this group box to specify search criteria for retrieving mass update transactions.

Mass Update ID	Select a mass update definition to narrow your search to only mass update transactions within that definition.
Section	Select a section to narrow your search to only mass update transactions that involve that section.
Element	Select an element to narrow your search to only mass update transactions that involve that element.
Empl ID (employee ID)	Select an employee to narrow your search to only mass update transactions that involve that employee.
Transaction Status	Select a transaction status to narrow your search to only the mass update transactions with that status.
Search	Click to retrieve a list of the mass update transactions that meet your search criteria. The system displays your search results in the Mass Update Transactions grid.

Total Transactions Per Status

Use this group box to view statistics that are related to the mass update transactions in your search results. The system displays a list of the mass update definitions in your search results, the status of each definition, and the transaction count for each definition.

Mass Update Transactions

Mass Update	The system displays the ID for each of the mass update definitions that meet your search criteria with a separate row for each employee who has a transaction based on the definition. Click the ID to access the Define Mass Update component, where you can review the details of the mass update definition.
Person ID	The system displays the ID of the person that is involved in each of the mass update transactions that meet your search criteria. Click the Person ID link on a row to access the Personal Data component, where you can review the personal data record for the individual.
Note. This link provides access to personal information, but the mass update transaction itself might not relate to personal data.	
Empl Record (employee record number)	The system displays the employee record number of the person that is involved in each of the mass update transactions that meet your search criteria. Click the employee record number link on a row to access the Job Data component, where you can review the person's job data record.
Note. This link provides access to job data, but the mass update transaction itself might not relate to job data.	

Name	The system displays the name of the person that is involved in each of the mass update transactions that meet your search criteria. Click the name link on a row to access the personal data for the individual.
Transaction Status	The system displays the status of each mass update transaction. Possible values are: • <i>Cancel</i>: A user has canceled the mass update transaction. • <i>Failure</i>: The Mass Update process cannot successfully process the transaction. View messages and exceptions to details about the failure. You can change this status to Cancel to cancel the transaction. Note however that this action is irreversible after it has been processed. • <i>Ready</i>: The transaction has been created during the selection phase and is ready to be processed. You can change this status to Cancel to cancel the transaction. Note however that this action is irreversible after it has been processed. • <i>Success</i>: The Mass Update process has successfully processed the transaction and performed the update. • <i>Warning</i>: The transaction has been created during the selection phase and is ready to be processed. However, a conflict occurred during transaction creation. For the shown employee record number, the employee is eligible for more than one additional population. The system has assigned the employee to the latest population. You can change this status to Cancel to cancel the transaction. Note, however, that this action is irreversible after it has been processed. When you change transaction statuses and save the page, the system updates the status of the mass update definition accordingly. If all transactions for a mass update definition have a status of <i>Cancel</i> or <i>Success</i> and no transactions have a status of <i>Ready</i>, <i>Warning</i> or <i>Failure</i>, then the system changes the status of the mass update definition to Closed. The Mass Update process processes only transactions with a status of <i>Ready</i> or <i>Failure</i>. It does not process transactions with any other status.
Details	Click to access the Transaction Details page, where you can view details of the mass update transaction and its execution log.
Execute	Click this button for a row to process the corresponding mass update transaction online individually. You can process only transactions with a status of <i>Ready</i> or <i>Failure</i> . The system triggers the Transaction Processor to process the transaction. The Transaction Processor then updates the statuses of the transaction and the mass update definition. Note that processing individual transactions online is especially useful for troubleshooting.

Reviewing Mass Update Transaction Details

Access the Transaction Details page (click the Details icon for a row on the Manage Mass Updates page).

Transaction Details

Mass Update: HXLAMU10 LAMU - Group -Negative Test

Person ID: HXLAMU8 James Jackson

Empl Record: 0

Transaction Status: Ready **Transaction ID:** 1

Updated By: **Updated on:**

Population Selection Criteria

Group Build=HXLAMU2

Changes

Process Mode Option = Add a New Effective Date
 Reference Date = 2006-02-15
 Work Location: Regulatory Region = HXUSA
 Job Labor: Labor Agreement = HXLMU3

Eligibility

From Date	From Sequence	To Date
01/02/2001	0	

Messages and Exceptions
[Customize](#) | [Find](#) |  | 

Last Update Date/Time	Severity	Description

Transaction Details page

Population Selection Criteria

Review the population selection criteria that the system used when generating the mass update transaction. This includes criteria for common changes and additional changes.

Eligibility

Review the date range for which the transaction is eligible for the mass update.

Messages and Exceptions

Review the messages and exceptions that the Transaction Processor generated for the mass update transaction during processing. The system displays in sequence the date and time of the last update in which the Transaction Processor generated the message or exception, the severity, and the description.

Performing Mass Updates

This section provides an overview of mass update processing and discusses how to run the Mass Update process.

Understanding Mass Update Processing

Use the Execute Mass Updates component to run the Mass Update Application engine (AE) process (HR_MASS_UPD), which processes transactions for mass updates in batch. To run this batch means of performing the update phase of mass update processing. You can also perform the batch update phase of mass update processing online through the Manage Mass Updates component.

The Mass Update process (HR_MASS_UPD) uses the services that are related to the data that is slated for update (that is, for job data, it uses the JOB_DATA component) and retrieves the data for each person in the group. It then assigns the new values for the people and saves the change, triggering any business rules that apply to this component. It also creates an execution result record to trace the statuses of all modifications for all people.

To run the Mass Update process, use the Execute Mass Updates run control page to specify one or more Mass Update definitions for which you want to process mass updates in batch and the sequence in which you want the Mass Update process to handle transactions for these definitions. You also can define parallel processing parameters. Parallel processing enables you to run instances of the Mass Update process in parallel to improve performance.

When you run the Mass Update process (which is triggered by the Mass Update Manager), it calls the Transaction Processor for the set of transactions to process (transactions in pending status). The Mass Update process monitors the queue of mass update transactions that are pending processing and a list of running instances until no more transactions are in the queue or until the process reaches the maximum parallel processing values that you define on the run control page.

When you run the process with parallel processing, the Mass Update Manager activates the Execution Manager by means of the Mass Update Execution AE process (HR_MASS_EXE) and uses the parallel processing parameters that you specify on the run control page. The Mass Update Execution process first creates an instance (which is called spawning). The process then assigns a chunk of transactions to that instance based on the value that you specify in the Transactions per Instance field and submits that instance to PeopleTools Process Scheduler for processing. As long as the instance number is less than or equal to the value that you specify in the Maximum of Instances field, the process spawns another instance. The process repeats these steps until it reaches the maximum allowable number of instances. The Mass Update Execution process is a child process of the Mass Update process.

Note. PeopleTools provides load balancing options on the Server Definition page, navigation PeopleTools, Process Scheduler, Servers, Service Definition.

Page Used to Perform Mass Updates

Page Name	Definition Name	Navigation	Usage
Execute Mass Updates	RUNCTL_MU	Workforce Administration, Collective Processes, Mass Update, Execute Mass Updates, Execute Mass Updates	Run the Mass Update process.

Running the Mass Update Process

Access the Execute Mass Updates page (Workforce Administration, Collective Processes, Mass Update, Execute Mass Updates, Execute Mass Updates).

Execute Mass Updates

Run Control ID: DOC [Report Manager](#) [Process Monitor](#) [Run](#)

*Seq	*Mass Update ID	Description	Mass Update Status
1	HXLAMU5	Labor Agreement Mass Update Definition	Initiated

Parallel Processing

☐ Run Instances in Parallel

Maximum of Instances:

Transactions per Instance:

Execute Mass Updates page

Mass Updates

Use this group box to select the mass update definitions for which you want to process the mass update transactions.

Seq(sequence) Indicates the order in which the process performs the mass update. By default, the system sets the first row to 1 and automatically increments by 1 for each additional row.

Mass Update ID and Description Select the mass update definitions that you want to include in the processing. You can select only from the mass update definitions that are initiated or in progress. The system displays the description of the selected mass update definition.

Mass Update Status The system displays the status of the mass update definition.

Parallel Processing

Use this group box to specify parameters for parallel processing of mass update execution instances. Note that to improve performance, you can run Mass Update processes in parallel on different hardware with no additional configuration required.

Run Instances in Parallel Select to enable the process to run instances in parallel. The process uses the Execution Manager to generate and monitor subprocesses (called process instances) that run in parallel on the PeopleTools Process Scheduler.

Deselect this check box to run the process on a single instance on PeopleTools Process Scheduler. The process in this case commits mass updates to the database after each transaction without intervals.

Maximum of Instances Enter the maximum number of instances that the process can generate and run in parallel. This option is available only when you have selected to run instances in parallel.

Transactions per Instance Enter the maximum number of transactions that the process can process per instance before creating a new instance. This option is available only when you have selected to run instances in parallel.

Deleting Pending Mass Updates

This section discusses how to delete mass updates.

Page Used to Delete Pending Mass Updates

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Delete Mass Updates	RUNCTL_MU	Workforce Administration, Collective Processes, Mass Update, Delete Mass Updates, Delete Mass Updates	Delete mass update transactions that you have generated and which are pending processing.

Deleting Mass Updates

Access the Delete Mass Updates page (Workforce Administration, Collective Processes, Mass Update, Delete Mass Updates, Delete Mass Updates).

Delete Mass Updates

Run Control ID: DOC

Report ManagerProcess MonitorRun

Mass Updates					Customize	Find	First	1 of 1	Last
*Seq	*Mass Update ID	Description	Mass Update Status						
1	HXLAMU5	Labor Agreement Mass Update Definition	Initiated	+	-				

Delete Mass Updates page

The Mass Update Manager triggers the Mass Update Delete Application Engine (AE) process (HR_MASS_DEL) to perform the transaction deletion. The Mass Update Delete process deletes the pending mass update transactions that you have generated through the Create Mass Updates component for the selected mass update definitions. The process also performs the necessary cleanup of the system tables.

Mass Updates

Use this group box to specify the mass update definitions for which you want to delete mass update transactions.

- Seq(sequence)

Specify the order in which you want the process to delete mass update transactions. By default, the system sets the first row to 1 and automatically increments by 1 each additional row.
- Mass Update ID and Description

Select the mass update definition that contains the mass update transactions that you want to delete. The system displays the name of the mass update definition. You can select only from mass update definitions that are initiated or in progress.
- Mass Update Status

The system displays the status of the mass update definition.

Chapter 27

Setting Up and Working with Approvals

This chapter provides an overview of approvals and discusses how to:

- Navigate approvals components.
- Register approval transactions.
- Link workflow transactions.
- Configure approval transactions.
- Set up approval process definitions.
- Define dynamic approvals.
- Define notification templates for approvals.
- Define users for approvals.
- Set up the notification and escalation manager.
- Set up security for approvals.
- Administer approvals.
- Generate an approvals audit report.
- Work with self-service approval transactions.

Understanding Approvals

Many daily tasks are part of a larger process that involves several steps and people working together, such as the approval of a promotion. To facilitate this type of multiuser process, PeopleSoft Enterprise provides approvals functionality, which enables you to automatically trigger workflow notifications to inform the next approver in the process of pending transactions.

Many PeopleSoft applications are delivered with predefined approval processes. However, this chapter provides the PeopleSoft Enterprise HRMS product line specifics of the Approval Framework functionality. While this document lists the HRMS navigation and additional topics specific to setting up HRMS Approval Framework, more detailed overviews and field descriptions are documented in the companion documentation *PeopleSoft Enterprise Human Resources PeopleBook: Approval Framework*.

See Also*Approval Framework***Approvals Terminology**

The following terms are important to the understanding of the approvals functionality and are used throughout the chapter:

Approval Process	A generic term referencing the business process of how a particular transaction is routed for approval within an organization.
Approval Framework	Engine that provides capabilities for the creation, execution, and management of approval processes.
Approval Process Definition	The definition of an approval process within the Approval Framework. The definition may contain stages, paths, steps, varying hierarchies, and criteria, among other configurable parameters.
Approval Process Definition ID (Process ID)	The ID associated with a particular approval process definition in the Approval Framework. Each transaction registered with the Approval Framework must have at least one process ID defined.
Request	A transaction that uses the Approval Framework for approval processing. For example, a promotion, transfer time off request, job requisition, and so on.
Approval Step or Step	A step has one or more approvers, whose actions are tracked. A step can be configured to require a set number of approvers to act, and has criteria which govern whether or not the step is to be active for the request under consideration. Steps are sequential.
Approval Path or Path	A path is a sequence of steps. For example, step two routes to its approvers only after step one is approved. A given approval could actually go through multiple approval paths based on some decisions. Paths can be mutually exclusive or parallel. They all converge at the final approval.
Approval Stage or Stage	A stage is a collection of approval paths. Approval stages come in a single sequence (stage 1, stage 2, and so on). An approval stage runs when it's immediately preceding stage finishes. When an approval stage runs, all the approval paths within it run simultaneously. The approval stage is considered complete when all approval paths within it have finished.
Approver	The person who has been determined to have the authority to approve (deny, pushback, and so on) a request.

Requester and Originator	The requester is the person for whom you want the Approval Framework to treat as the initiator of a request. In most cases the requester and originator are the same person. However, when using the Delegation feature the requester and originator of a request can vary. For example, if a manger delegates a transaction to a direct report and that direct report submits the transaction, the direct report is the originator and the manager is the requester.
Subject	The person for whom a transaction is being processed. For example, Karen submits to her boss, Russell, a promotion request for one of her employees, Robbin. Karen is the requester (originator), Robbin is the subject, and Russell is the approver.
Supervisor or Manager	The person who has management responsibilities for the requester or for an approver, as defined in your direct report settings during implementation.
Approvals Administrator or Approval Framework Administrator	The system administrator who is responsible for configuring, managing, troubleshooting, and maintaining approvals.
Event or Approval Event	The Approval Framework engine is event driven. Events are typically actions that can be taken by a user in the system, actions such as submit, approve, deny, push back, and so on.
Status or Approval Status	Statuses typically represent the overall state a transaction is in, such as pending, on hold, approved, denied, terminated, and so on.
Approval Criteria	Rules used to decide whether or not approval is required. Approval criteria fields and dimensions are data elements and attributes that are used to define the approval criteria.
Approval Hierarchy	The organizational hierarchy that models the actual approvals required by a transaction type (for example, approval hierarchy by supervisor or department).
User List	Collection of users (PeopleSoft Operator IDs) expressed as the result of an SQL statement, PeopleSoft role, or PeopleSoft Application Class.
Alternate Approver or Alternate User ID	A user can have another user in the system as his or her alternate approver for a specified period of time. This is set on the Workflow page of the User Profile component within PeopleTools security.
Delegation	Delegation is when a person authorizes another to serve as a his or her representative for a particular task of responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Approval Framework

The Approval Framework is the engine that provides the framework and capabilities for creating, running, and managing approval processes. The engine uses a series of database objects combined with application component configuration settings to determine how to process approvals using workflow.

Approval workflows are triggered when requesters submit a transaction, such as a promotion. The application hands the transaction over to the Approval Framework, which finds the appropriate approval process definition and launches the approval workflow. A set of approvers then carry out tasks related to the transaction.

The Approval Framework enables three levels of users to develop, configure, and use transaction approvals that meet their organizational requirements. For example, the process of submitting a promotion and getting it approved requires defining who will approve the promotion, the order in which they will approve it, and how it will be routed to approvers.

In contrast to the standard PeopleSoft workflow, which requires advanced technical skills in PeopleSoft PeopleTools to create and maintain, approval workflow provides an alternative workflow that is much easier to create, configure, and maintain. For example, all of the steps in approval workflow are defined using PeopleSoft pages rather than underlying PeopleSoft PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages instead of requiring technical developers to create workflow rules.

See Also

Approval Framework, "Understanding the Approval Framework"

Approvals Business Process Flow

Within the approvals business process flow:

- Application developers register information with the Approval Framework by using the Register Transactions page, where they register an application with the engine and describe its components, event handler, and records.

As part of defining the registry, application developers create a record and table in which to store cross-reference information and set up notification templates for events. This definition determines the pending approval workflow process and tells an application which transaction is being approved or denied. Application developers also link the transaction component.

Note.

PeopleSoft Enterprise Human Resources delivers many transactions that are registered with the Approval Framework. *Do not* modify these transaction registry definitions because the system requires their setup to be as delivered. For a complete list of delivered transaction registry definitions, access the Register Transactions component by navigating to Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Register Transactions.

- Functional business analysts define the approval process definition for an application transaction.

The approval process definition includes setting up approval stages, paths, steps, recipients, and notifications for each approval process ID. Analysts identify the approval transaction registry entry on which to base approval process definitions and then define the details of the process.

Functional business analysts also define or review user list definitions, email template definitions, and transaction configuration settings.

After completing the setup, functional business analysts are responsible for maintaining and troubleshooting approval process transactions.

- Requesters submit a transaction for approval.

This action launches the approval process. The Approval Framework reads the approval process definition and queues the transaction for approvers.

- The system queues an approval task to an approver or reviewer using email notification, Worklist entry, or both.

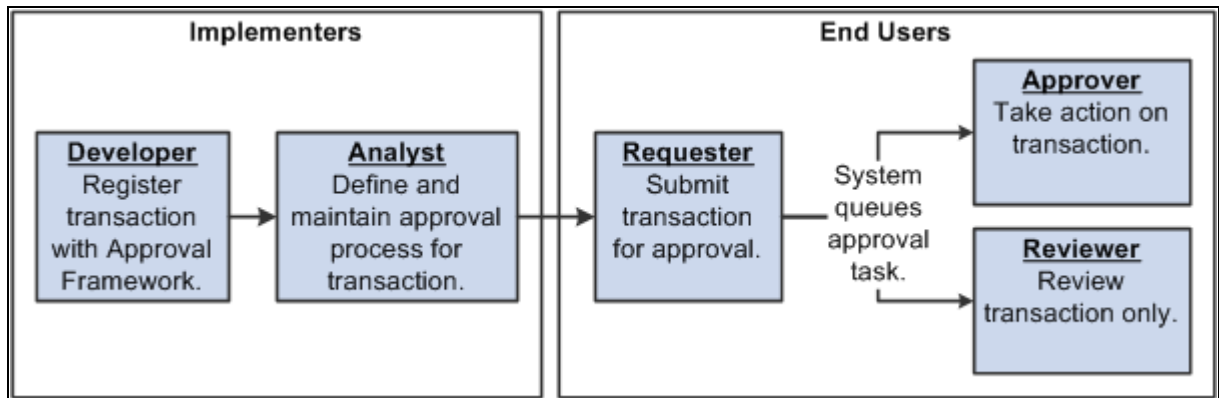
The URL encoded in the Worklist entry points to the corresponding approval component.

- Approvers take actions on transactions.

They can approve or deny requests, monitor transaction statuses, and audit approvals. When an error or violation of criteria or rules occurs during the approval process, the system notifies the approvals administrator, who interacts to resolve the issue.

- Reviewers view the transaction.

This diagram details the business process flow of implementing and using approvals functionality. It shows tasks that application developers, business analysts, and end users perform in conjunction with approval workflow.



Approval business process flow

See Also

Approval Framework, "Understanding the Approval Framework," Understanding the Approval Framework Process Flow

Approval Framework, "Understanding the Approval Framework," Understanding Transaction Approval Flows

Approval Framework, "Understanding the Approval Framework," Understanding Header- and Line-Level Approvals

Approval Framework, "Understanding the Approval Framework," Understanding Approval Features

Sources of Information

The Approval Framework is a common component that is shared across multiple PeopleSoft Enterprise applications both within HRMS and other product families. For the HRMS product family, you'll find documentation pertaining to the Approval Framework in various locations:

- This present chapter lists the Approval Framework functionality that applies to the setup steps, navigation paths, and details that are specific to the HRMS product family.
- Application-specific HRMS PeopleBooks (such as the *PeopleSoft Enterprise Absence Management PeopleBook*) expand on all of the above texts by providing approval workflow details that relate to delivered business processes.
- The *PeopleSoft Enterprise Human Resources PeopleBook: Approval Framework* describes the common Approval Framework functionality that applies to all product families.

Before implementing, you should read all relevant sources of information to gain a complete understanding of how the pieces fit together.

See *Approval Framework*.

Implementation of HRMS Transactions for Approval Framework

PeopleSoft delivers many approval transactions that are already configured to work with the Approval Framework. For delivered transactions, you should review the delivered transaction data within the application pages to ensure that the data fits your business processes.

To review delivered HRMS transactions for use with the Approval Framework:

1. Register the approval transaction in the Approval Framework through the Register Transactions page.
See [Chapter 27, "Setting Up and Working with Approvals," Registering Approval Transactions, page 666.](#)
2. Link Human Resources self-service transactions to the Approval Framework through the Workflow Transactions page.
See [Chapter 27, "Setting Up and Working with Approvals," Linking Workflow Transactions, page 669.](#)
3. Set up the configuration options for the approval transaction on the Configure Transactions page.
See [Chapter 27, "Setting Up and Working with Approvals," Configuring Approval Transactions, page 674](#)

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4. Set up the approval process definition through the Setup Process Definitions component.

See [Chapter 27, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions, page 676.](#)

To set up the approval process definition:

- a. Define the stages, paths, and steps of the approval process definitions on the Setup Process Definitions page.
- b. Define criteria for workflow approval processes at the definition, path, and step level on the Criteria Definition page, which is accessed through links on the Setup Process Definitions page.
- c. Set up path details for workflow approval processes on the Approval Path Definition page.
- d. Define step details for approval workflow processes on the Approval Step Definition page.
- e. Define dynamic approvals through various components.

See [Chapter 27, "Setting Up and Working with Approvals," Defining Dynamic Approvals, page 683.](#)

5. Create email templates for the approval transaction on the Generic Template Definition page.

See [Chapter 27, "Setting Up and Working with Approvals," Defining Notification Templates for Approvals, page 686.](#)

6. Maintain user list definitions for the approval transaction on the User List Definition page.

See [Chapter 27, "Setting Up and Working with Approvals," Defining Users for Approvals, page 687.](#)

7. Set up the Notification and Escalation Manager.

See [Chapter 27, "Setting Up and Working with Approvals," Setting Up the Notification and Escalation Manager, page 690.](#)

8. Set up the appropriate permission lists, roles, and web libraries through PeopleTools security components.

See [Chapter 27, "Setting Up and Working with Approvals," Setting Up Security for Approvals, page 692.](#)

If you need to implement other transactions for use with the Approval Framework besides the delivered transactions, you must complete additional implementation steps. These steps include those involving object construction within PeopleTools Application Designer and those involving setup within application pages. For technical details on how to implement additional approval transactions, see the *PeopleSoft Enterprise Human Resources PeopleBook: Approval Framework*

Navigating Approvals Components

PeopleSoft Enterprise HRMS provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the PeopleSoft Enterprise HRMS custom navigation pages, the PeopleSoft application provides menu navigation and standard navigation pages.

This section discusses how to use the custom navigation pages to navigate in the components for approvals functionality.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate Approvals Components

This table lists the custom navigation pages that are used to navigate in the setup and administrative components for approvals functionality:

Page Name	Navigation	Usage
Approvals Setup Center	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center	Approval administrators and implementers can use the links on this page to access the components necessary to register and set up transactions for the Approval Framework for PeopleSoft Enterprise HRMS.
Approvals and Delegation	Workforce Administration, Self Service Transactions, Approvals and Delegation	Approval administrators can use the links on this page to access the components necessary to monitor and troubleshoot approval transactions and to maintain delegation and for PeopleSoft Enterprise HRMS.

Registering Approval Transactions

To register approval transactions, use the Register Transactions (EOAW_TXN) component.

This section provides an overview of the approval transaction registry, lists prerequisites, and lists the page used to register approval transactions.

Understanding the Approval Transaction Registry

The approval transaction registry is the interface that developers use to register a PeopleSoft Enterprise application's transaction with the Approval Framework. Using the Register Transactions page, developers define how the system interacts with portions of the application that have been defined for approvals. Transactions that require approvals are candidates for being linked to the Approval Framework. Developers can use the Register Transactions page to link the components, event handler, records, and classes that they created through PeopleTools Application Designer for an application transaction (such as a job offer or employee absence request) into the approval process. The transaction definition itself is the metadata which describes the transaction make up to the Approval Framework. In some cases, you might add a transaction or make changes to a transaction. Application developers can register the main records and components that make up the transaction, then functional business analysts can select the approval transaction on which to base the approval process definition.

Delivered Approval Transaction Process IDs

PeopleSoft Enterprise HRMS delivers several approval transaction process identifiers that are common across applications for use with the Approval Framework. The system uses these process IDs specifically for registering delegation-related transactions with the Approval Framework so that the approval framework, which handles the requests, can communicate back and forth with the delegations framework.

When registering approval transactions with the Approval Framework on the Register Transactions page, you must specify a header record for the approval transaction. When you are configuring these process IDs in the Configure Transactions component, you can use this header record and any of the listed fields to define additional criteria for the processing of the approval transaction. You define this additional criteria on the Criteria Definition page, which is accessible through the Configure Transactions component. Fields not listed on the Register Transactions component are not available for the criteria definition.

This table lists the approval transaction process IDs that PeopleSoft Enterprise HRMS applications deliver:

<i>Process ID</i>	<i>Description</i>
AbsenceManagement	Absence Management
Absence_Mgmt_ByDeptManager	Absence Management By Department Manager
Absence_Mgmt_ByPosMgmt	Absence Management By Position Management
Absence_Mgmt_ByPosnDeptMgr	Absence Management By Position - Department Manager
Absence_Mgmt_ByPosnSupervisor	Absence Management By Position - Supervisor
Absence_Mgmt_BySupervisorId	Absence Management By Supervisor ID
Abs Mgmt - Leave Donations	Leave Donations
AM_Extended_Abs	Extended Absence
Delegation	Defines delegation transactions for the Approval Framework.

Process ID	Description
DelegationBatch	Defines batch delegation transactions for the Approval Framework.
DelegationNotifyAdmin	Defines delegation transactions for the Approval Framework where the administrator gets notified.
DelegationRevoke	Defines revoked delegation transactions for the Approval Framework.
JPMNonpersonProfiles	Non-person Profile
JPMPersonProfiles	Person Profile
JobOffer	Job Offer
JobOpening	Job Opening
PerformanceManagement	Appraisal Transaction Approval
PromoteEmployee	Promotion Transaction Approval
ReportingChgEmployee	Reporting Change Transaction Approval
TLPayableTime	TL Payable Time Process ID
TLReportedTime	TL Reported Time Process ID
TransferEmployee	Transfer Transaction Approval

Note. Refer to the corresponding documentation in your application-specific PeopleBooks for information about delivered approval transaction process IDs that are specific to an application.

Note. Any PeopleSoft delivered approvals will already have the Approval Transaction Registry populated. No additional configuration is typically needed.

Prerequisites

Before registering approval transactions, you must create all of the required objects in PeopleTools Application Designer.

To complete the prerequisites for defining the approval transaction registry:

- Create a Transaction Handler Application class that extends an approved event handler class delivered by approval workflow.
- Create notification templates for the events, which include approval and denial for header and line levels.
- Create transaction data sources, as needed.

- Create views on transaction tables that will serve as criteria sources.
- Create a view to serve as a source for ad hoc users.
- Create a view to serve as a source for approver contact information.

See Also

Chapter 27, "Setting Up and Working with Approvals," Implementation of HRMS Transactions for Approval Framework, page 664

Page Used to Register Approval Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Register Transactions	EOAW_TXN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Register Transactions, Register Transactions	Register approval transactions in the Approval Framework by creating a unique approval process identifier for each approval transaction. The transaction definition is the metadata that describes the transaction setup to the Approval Framework. See <i>Approval Framework</i> , "Defining the Approval Transaction Registry."

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

Linking Workflow Transactions

To set up links to self-service transactions and approval functionality, use the Workflow Transactions (HCM_EO_TXN) component.

This section lists the page used to link workflow transactions and discusses how to link workflow transactions.

Page Used to Link Workflow Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workflow Transactions	HCM_EO_TXN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Workflow Transactions, Workflow Transactions	Link self service transactions to the appropriate approval functionality, either the Approval Framework or the existing approval workflow functionality from previous releases. For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

Linking Workflow Transactions

Access the Workflow Transactions page (Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Workflow Transactions, Workflow Transactions).

Workflow Transactions					
▼ Workflow Transactions					
*Transaction Name	*Category	Description	Delegate Initiation		
EP_CREATE	HR_TRANSACTIONS ▼	Appraisals by Dflt Access Type	☐	+	-
EP_CREATE_GRP	HR_TRANSACTIONS ▼	Appraisals by Group ID	☐	+	-
GPCH_ABSENCE	HR_TRANSACTIONS ▼	Absence	☐	+	-
GPCH_ABSENCE_MGR	HR_TRANSACTIONS ▼	Absence by Manager	☐	+	-
GPCH_OVERTIME	HR_TRANSACTIONS ▼	Overtime	☐	+	-
GPCH_OVERTIME_MGR	HR_TRANSACTIONS ▼	Overtime by Manager	☐	+	-
GP_ABS_EESS_BAL	HR_TRANSACTIONS ▼	Employee Absence Balance	☒	+	-
GP_ABS_EESS_HIST	HR_TRANSACTIONS ▼	Employee Absence History	☒	+	-
GP_ABS_EESS_REQ	HR_TRANSACTIONS ▼	Employee Absence Request	☒	+	-
GP_ABS_MGRSS_BAL	HR_TRANSACTIONS ▼	Manager Absence Balance	☒	+	-
GP_ABS_MGRSS_HIST	HR_TRANSACTIONS ▼	Manager Absence History	☒	+	-
GP_ABS_MGRSS_REQ	HR_TRANSACTIONS ▼	Manager Absence Request	☒	+	-
HR_ADDR_CHG	HR_TRANSACTIONS ▼	Address Change	☐	+	-

Workflow Transactions page (Workflow Transactions grid)

The Workflow Transactions grid and the Approval Workflow Engine (AWE) and Delegation Transactions grid are mutually exclusive. You cannot register the same transaction in both grids. If attempted, the system displays an error, and you must delete one of your entries before saving the page.

Workflow Transactions

Use the Workflow Transactions grid to register self-service transactions that use existing workflow configuration from a previous release. For example, if the self-service transaction is currently configured to update core records upon final approval via a component interface, you can list the transaction the Workflow Transactions grid so that you can still leverage these configuration values.

Transaction Name Enter the name of the self-service transaction in either one grid or the other, not both.

Category Assign the self-service transaction to a category. Generally, all self-service transactions are assigned to the HR_TRANSACTIONS category. You can set up categories in the Workflow Transaction Categories page.

See Chapter 34, "Setting Up and Working with Self-Service Transactions," Using Workflow with Self-Service Transactions, page 852.

Description Enter a description of the self-service transaction.

Delegation Initiation

Select to enable delegation of transaction initiation for the corresponding self-service transaction that uses existing approvals configuration from a previous release. The transaction then becomes available for configuration as an initiate-type delegation transaction. Configure delegation transactions on the Configure Delegation Transaction page.

See [Chapter 28, "Setting Up and Working with Delegation," Configuring Delegation Transactions, page 722.](#)

Approval Workflow Engine (AWE) and Delegation Transactions

Use the Approval Workflow Engine (AWE) and Delegation Transactions grid to register self-service transactions that use the Approval and Delegation framework. The data that you enter into this grid links the transaction name and accompanying tables for HRMS self-service transactions to the approval process IDs that you create for these transactions on the Register Transactions page as part of the Approval Framework setup.

Note. You can only list a particular transaction once. You cannot assign the same Approval Framework transaction to multiple HR_TRANSACTIONS because this violates Delegation processing requirements.

Approval Workflow Engine (AWE) and Delegation Transactions				
Details1 Details2				
*Transaction Name	*Category	Description		
EP_APPRAISAL	HR_TRANSACTIONS	Performance Document	+	-
GP_SS_ABS_APPR_L	HR_TRANSACTIONS	Manager Absence Approve	+	-
HR_MIL_RANK_CHG	HR_TRANSACTIONS	Military Rank Change	+	-
HR_PROMOTION	HR_TRANSACTIONS	Promotion	+	-
HR_REPORT_CHG	HR_TRANSACTIONS	Reporting Change	+	-
HR_TRANSFER	HR_TRANSACTIONS	Transfer	+	-
JPMNonpersonProfiles	HR_TRANSACTIONS	Nonperson Profiles	+	-
JPMPersonProfiles	HR_TRANSACTIONS	Person Profiles	+	-
JobOffer	HR_TRANSACTIONS	Job Offers	+	-
JobOpening	HR_TRANSACTIONS	Job Openings	+	-
TL_MSS_EE_SRCH_PRD	HR_TRANSACTIONS	Manage Reported Time	+	-
TL_SRCH_APPRV_GRP	HR_TRANSACTIONS	Manage Payable Time	+	-
WCS_ECM_AWE_HOME	HR_TRANSACTIONS	Compensation Approvals	+	-

Workflow Transactions page (Approval Workflow Engine (AWE) and Delegation Transactions grid: Details1 tab)

Approval Workflow Engine (AWE) and Delegation Transactions					
Details1		Details2			
*Transaction Name	*Process ID	Delegate Initiation	Delegate Approvals		
EP_APPRAISAL	PerformanceManagement	☐	☒	+	-
GP_SS_ABS_APPR_L	Absence_Mgmt_BySuperv	☐	☒	+	-
HR_MIL_RANK_CHG	MilitaryRankChange	☐	☒	+	-
HR_PROMOTION	PromoteEmployee	☒	☒	+	-
HR_REPORT_CHG	ReportingChgEmployee	☒	☒	+	-
HR_TRANSFER	TransferEmployee	☒	☒	+	-
JPMNonpersonProfiles	JPMNonpersonProfiles	☐	☐	+	-
JPMPersonProfiles	JPMPersonProfiles	☐	☐	+	-
JobOffer	JobOffer	☐	☒	+	-
JobOpening	JobOpening	☐	☒	+	-
TL_MSS_EE_SRCH_PRD	TLReportedTime	☒	☒	+	-
TL_SRCH_APPRV_GRP	TLPayableTime	☐	☒	+	-
WCS_ECM_AWE_HOME	ApproveCompensationPro	☒	☒	+	-

Workflow Transactions page (Approval Workflow Engine (AWE) and Delegation Transactions grid: Details2 tab)

Transaction Name Enter the name of the self-service transaction in either one grid or the other, not both.

Category Assign the self-service transaction to a category. Generally, all self-service transactions are assigned to the HR_TRANSACTIONS category. You can set up categories in the Workflow Transaction Categories page.

Description Enter a description of the self-service transaction.

Approval Process ID When implementing the Approval Framework, you define a unique transaction registry ID, called a process ID, for each of your HRMS self-service transactions on the Register Transactions page. Select the approval process ID that you have defined for this self-service transaction. By creating this link between the self-service transactions and the Approval Framework, the self-service transactions can dynamically retrieve this approval process ID by transaction name and thus invoke the Approval Framework. The Approval Framework requires this parameter during processing.

Delegation Initiation Select to enable delegation of transaction initiation for the corresponding self-service transaction that uses the Approval Framework. The transaction then becomes available for configuration as an initiate-type delegation transaction. Configure delegation transactions on the Configure Delegation Transaction page.

Delegate Approvals

Select to enable delegation of transaction approval for the corresponding self-service transaction. The transaction then becomes available for configuration as an approval-type delegation transaction. This functionality is available only for transactions that you register with the Approval Framework in the lower grid.

If you select both the Delegation Initiation and the Delegate Approvals check boxes, you can configure the transaction for delegation of initiations and approvals. Configure delegation transactions on the Configure Delegation Transaction page.

See Also

Chapter 28, "Setting Up and Working with Delegation," page 707

Configuring Approval Transactions

To select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification, use the Configure Transactions (EOAW_TXN_CONFIG) component .

This section lists the page used in configuring approval transactions.

Page Used to Configure Approval Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Configure Transactions	EOAW_TXN_NOTIFY	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Configure Transactions, Configure Transactions	Configure how the system uses the particular implementation of approval triggers by configuring all the events and notifications associated with your approval process IDs. For HRMS transactions, the workflow engine requires that you enter specific values in the User Utilities section to enable it to interact with the Approval Framework and Delegations. In the User Utilities Package field, you must select the value <i>HCSC_USER_UTILITIES</i>. In the User Utilities Path field, you must select the value <i>UserUtilities</i>. PeopleSoft Enterprise HRMS delivers these values. Note. The user utilities class checks users against delegation to determine if the users have delegated their authority. If not, then the user utilities class determines whether the users have an alternate user in their user profiles. The Events section defines the information to build the default URL to include in notification for each of the participants that you specify in the Notifications section.

See Also

Approval Framework, "Defining the Approval Transaction Registry," Configuring Approval Transactions

Chapter 27, "Setting Up and Working with Approvals," Defining Notification Templates for Approvals, page 686

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Setting Up Approval Process Definitions

To set up approval process definitions, use the Setup Process Definitions (EOAW_PRCs) component.

Business analysts use this component to define an approval process definition. The process is made up of stages and their paths and steps. The approval steps that you place on the approval path represent the approval levels that are required for a transaction.

You can develop approval processes that:

- Meet organizational or tiered approval limits.
- Use alternate hierarchies, such as supervisor approval and department approval.
- Use multiple parallel tracks, such as division and HR approvals at once.
- Use staged tracks, such as first receiving department approval and afterward receiving HR approval.

Typical approval processes might include:

- Employees or supervisors who can approve certain transactions.
- Two different approvers for each step, where both approvers at a step must approve the request for it to advance to the next step.

See *Approval Framework*, "Setting Up Approval Framework Process Definitions."

This section lists the pages used to set up approval process definitions and reviews an example of setting up the HRMS approval process definition.

Pages Used to Set Up Approval Process Definitions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Setup Process Definitions	EOAW_PRCs_MAIN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Setup Process Definitions, Setup Process Definitions	Define workflow approval process stages.

Page Name	Definition Name	Navigation	Usage
Criteria Definition	EOAW_CRITERIA	- Click the Definition Criteria link on the Setup Process Definitions page. - Click the Alert Criteria link on the Setup Process Definitions page. - Click the Criteria link in the Path section on the Setup Process Definitions page. - Click the Criteria icon in the Steps section on the Setup Process Definitions page .	Define criteria for workflow approval processes. Criteria definitions are used to define bits of logic that, at runtime, the Approval Framework evaluates for a Boolean result (true or false). Use this page also to define alert criteria. Alert criteria, although the same in principal as the other criteria types, is different in application. You can use alert criteria to decide when to display an alert. For example, you could decide to display a message to the approver on the Approve Transaction page if the transaction meets the specified criteria. To use this page to define alert criteria, click the Alert Criteria link on the Setup Process Definitions page. Alert criteria has two differences: - The description field is the actual alert text that appears on the approval page. - The criteria determines if an alert should appear on the approval page, as opposed to routing a line or header for approval.
Approval Path Definition	EOAW_PATH_SEC	Click the Details link or icon within the Paths group box on the Setup Process Definitions page.	Set up path details for workflow approval processes.
Approval Step Definition	EOAW_STEP_SEC	Click the Details icon within the Steps group box on the Setup Process Definitions page.	Define step details for workflow approval processes.

Page Name	Definition Name	Navigation	Usage
Copy Approval Process	EOAW_PRC_COPY	Click the Clone Approval Process link on the Setup Process Definitions page.	Create a new approval process definition by copying the existing one. The system requires that you assign a new definition ID and effective date.
Preview Approval	EOAW_PRV_MON_SRC	Click the Preview Approval Process link on the Setup Process Definitions page.	Verify the routing of the approval process definition by previewing.

Reviewing an Example of Setting Up the HRMS Approval Process Definition

This section provides an example of how set up an approval process definition for a transaction that is specific to PeopleSoft Enterprise HRMS.

In this example, let's suppose that your company wants to create an approval process definition to handle the approval of an employee's request for a day off.

1. First you must define the stages, paths, and steps of your approval process (Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Setup Process Definitions, Setup Process Definitions).

Setup Process Definitions

[Clone Approval Process](#) | [Approval Process Viewer](#) | [Preview Approval Process](#)

Process ID:
 Definition ID:
 Effective Date:
 Description:

Definition Options

[Definition Criteria](#) | [Alert Criteria](#) | [Definition Notifications](#) | [Timeout Options](#)

*Admin Role: [Search](#) ☐ Default Process Definition
 *Status: ☐ User Auto Approval
 Priority: ☐ Route to Requester
☐ Include Requester

Stages Find | View All | First 1 of 1 | Last

*Stage Number: Description: Level:

Paths Find | View All | First 1 of 1 | Last

Description: *Source: [Details](#) | [Criteria](#)

Steps Customize | Find | View All | First 1-2 of 2 | Last

	Description	Approver User List	Details	Criteria	
1	Step 1	AbsenceBySupervisor01 Search	Details	☒	Up Down + -
2	Step 2	AbsenceBySupervisor01 Search	Details	☒	Up Down + -

[Expand/Collapse All](#)

Setting up an approval process definition

Notice in the example that the approval process contains one stage, one path, and two steps. The stage in this example contains one approval path in the organization that requires two levels of supervisor approval before the employee is granted the day off. First, the employee's supervisor must grant approval, and then that supervisor's manager must approve the request.

You can define multiple stages, paths, and steps for an approval process definition. For example, perhaps you require administrator approval of the employee's day-off request. In this case, you would create an additional path within the existing stage that contains one step requiring administrator approval.

The Approval Framework processes multiple stages and steps sequentially. The engine cannot advance to the next step until you complete the preceding step in the given path. Likewise, the engine cannot advance to the next stage until you complete all paths within a given stage. For paths, however, you can define them as static (processed sequential) or dynamic (processed in parallel).

2. Now you will add logic that the Approval Framework evaluates at runtime for a Boolean result. You can define criteria at the definition, path, or step level. For this example, you want to add logic to the definition level that instructs the Approval Framework to stop processing if it encounters an absence request that is missing the employee ID value. To set up this criteria, click the Definition Criteria link at the top of the Setup Process Definitions page.

Criteria Definition

*Criteria Type: User Entered

☒ All Criteria Needed to Satisfy

▼ User Entered Criteria Find | View All | First 1 of 1 Last

Description:

▼ Field Criteria

Record: GP_ABS_SS_DAT Field Name: EMPLID

Customize | Find | First 1 of 1 Last

*Criteria Operator			
1	Is Not Blank	+	-

▼ Monetary Criteria

Amount Record: Amount Field:

Currency Field:

Operator: Greater Than

Amount: 0.000

Currency Code:

Rate Type:

OK Cancel Apply

Defining processing criteria

On this page you will:

- a. Select the Criteria Type field value *User Entered*.

This activates fields on the page that enable you to manually define your criteria.

- b. Select the All Criteria Needed to Satisfy check box.

The system selects this check box by default.

- c. Use the Field Criteria group box to specify the necessary logic. In the Record field, select the header record for this transaction. You define header records for transactions on the Register Transactions page. In this instance, the process ID of the transaction is *AbsenceManagement*, which has a defined header record of *GP_ABS_SS_DAT*. Now choose between any of the fields that are defined within that header record for the process ID.

In this example, *EMPLID* is selected. To complete the logic, select in the Criteria Operator field, the *Is Not Blank* value.

- d. Click Apply and then OK.

The logic in this criteria definition states that when processing a request for time off, the Approval Framework uses this definition ID to process any transaction related to the AbsenceManagement approval process ID that contains employee ID as part of the transaction. If the transaction does not contain an employee ID value, the Approval Framework continues to search for another definition ID that matches the required criteria needed to process the transaction for the related approval process ID.

3. Next you want to require the Approval Framework to advance the approval to the next approver in the path if the current approver doesn't respond within three days. Click the Details link in the Paths group box to access the Approval Path Definition page.

Approval Path Definition

Criteria

Approval Path: 1

*Step Source: Static

Description: Absence Management

Long Description:

☐ Skip Prior Steps for Requester

Timeout Options						Customize	Find	First	1 of 1	Last
	*Escalate Option	Hours	Days	Reassign To	User List					
1	Advance Approval		3							

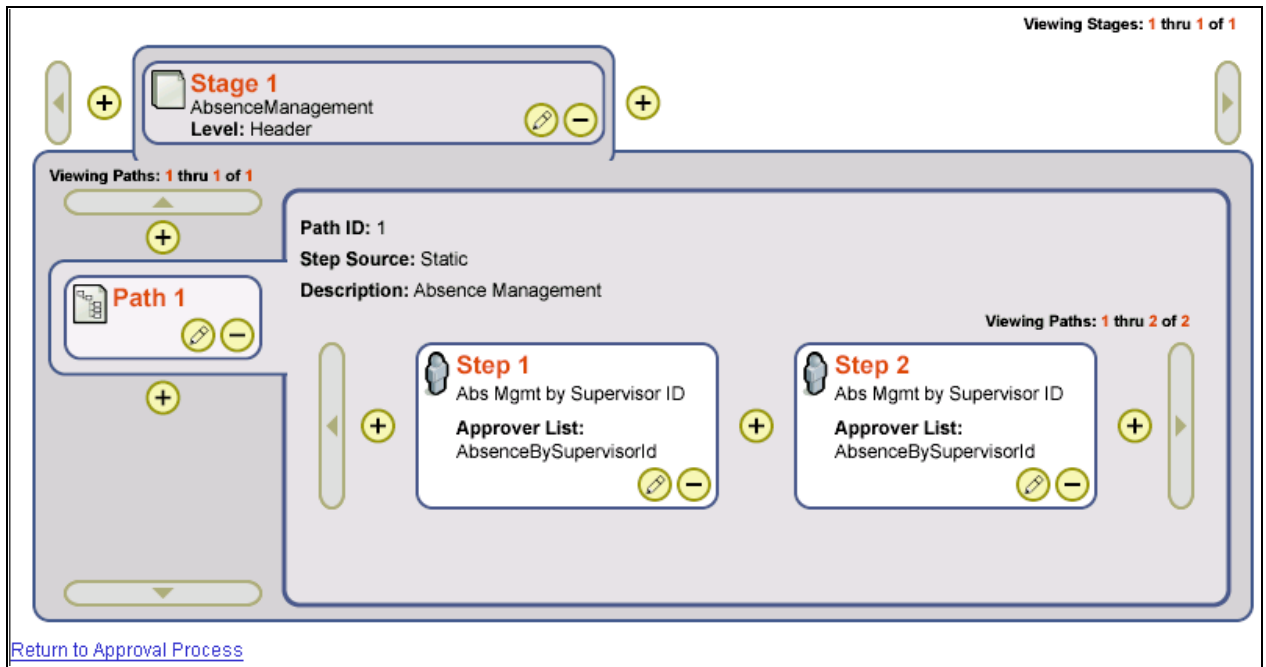
OK Cancel

Specifying a timeout option of three days

You can use the Timeout Options group box to define what should happen to a particular transaction or request after a certain period of time. For instance, you can notify the participant, advance the approval, or reassign the approval after a certain number of hours or days have passed. You can have the request reassigned to a particular person in the database or to a predefined user list.

To meet the needs of this example, set the Escalate Option field to *Advance Approval*, the Days field to 3, and click OK.

- Now that you have defined the approval process definition, you can look at a graphic representation. Click the Approval Process Viewer link at the top of the Setup Process Definitions page.



Viewing the approval process definition

The Setup Process Definitions page enables you to view graphically your approval process definition and, if necessary, quickly modify the definition. Click the plus signs, minus signs, or correction buttons. For example, perhaps you have decided that it is best that there is a third approval step for an absence request. Click the plus sign after step 2.

Setup Process Definitions

[Clone Approval Process](#) | [Approval Process Viewer](#) | [Preview Approval Process](#)

Process ID: AbsenceManagement
 Definition ID: SHARE
 Effective Date: 01/01/1990
 Description: Absence Management

Definition Options

[Definition Criteria](#) | [Alert Criteria](#) | [Definition Notifications](#) | [Timeout Options](#)

*Admin Role: AM Administrator
 *Status: Active
 Priority: 1

☐ Default Process Definition
☒ User Auto Approval
☐ Route to Requester
☐ Include Requester

Stages

*Stage Number: 1 Description: AbsenceManagement Level: Header

Paths

Description: Absence Management *Source: Static

Steps

	Description	Approver User List	Details	Criteria			
1	Step 1	AbsenceBySupervisor01					
2	Step 2	AbsenceBySupervisor01					
3							

[Expand/Collapse All](#)

Adding an additional step from the Approval Process Viewer page

The system returns you to the Setup Process Definitions page and inserts a new row after step 2 for you to enter the new step. Click Save when you have completed your definition.

Defining Dynamic Approvals

To set up dynamic approvals, use the Setup Process Definitions (EOAW_PRCs), Maintain User Lists (EOAW_USER_LIST), Roles (ROLEMAINT), and User Profiles (USERMAINT) components.

This section provides an overview of how to configure dynamic approval authorizations and lists the pages used to define dynamic approvals.

Understanding How to Configure Dynamic Approval Authorizations

PeopleSoft applications use workflow to configure approval paths in two manners. The first configuration is to define every approval in step-by-step fashion. The second manner is to create dynamic approvals. Dynamic approvals enable you to create a single step that systematically identifies every potential approver, searches to find out if that approver has enough authority to complete the approval, and creates a visual path for users to view of all necessary approvers in the process.

To configure the dynamic approval authorization, the approvals administrator must:

1. Define user lists for dynamic authorizations through the User List Definition page.

The Approval Framework delivers user lists that address the most common approval scenario of routing an approval to a supervisor. If the requester is an end user, his immediate supervisor cannot authorize more than 5,000.00 USD, and the job requisition is for 6,000.00 USD, then the requisition moves to the next level supervisor. The user ID for the direct supervisor is listed on the user profile.

Note. To enable the Supervisor by User ID approval routing, you must have a supervisor assigned to your user ID for the job.

2. Create an approval authorization by authorizing roles and approvers for dynamic paths through the Approval Authorization page.

The Approval Authorization page is available through PeopleTools but must be added to the portal navigation to render it available in the application. To add this page to portal navigation, navigate to PeopleTools, Portal, Structure and Content. On the displaying page, click *Set Up HRMS*, then *Common Definitions*, then *Approvals*, and then the Edit link for the *Authorize* option. Deselect the Hide from portal navigation check box, and click Save. Then navigate to PeopleTools, Portal, Portal Security Sync and run the portal security sync process so that the portal cache recognizes the changes.

If you don't specify a definition ID, the authorization is generic. To create an approval authorization for specific definition IDs, you must add a line for each definition ID.

Note. If you activate self-approval on the Approval Authorization page, it replaces the self-approval on static path steps.

3. Define a dynamic approval path through the Approval Path Definition page.

Note. When creating criteria within the path that will trigger the workflow engine to activate, be certain that you set up the final approver as *Greater Than* so that no gaps occur.

To define a dynamic approval path:

- a. Select *Dynamic* for a dynamic approval path in the Step Source field.
- b. Select the Notify Admin on No Approvers check box to indicate that the approvals administrator is to be notified if the system does not find an approver for the path. This option is only available when the Step Source is *Dynamic*.
- c. Select the Skip Prior Steps for Requester check box to indicate that if one of the approvers in this path is also the requester, then the system is to skip all steps in the path prior to that approver's step.
- d. Select the Check Authorization check box to enable the approval authorization.
- e. Select the Skip Unauthorized Users check box to enable the approval process to skip users within the user list if the system determines that they can't satisfy all of the criteria for approval.

For more information and an example of dynamic approvals see *PeopleSoft Enterprise Human Resources PeopleBook: Approval Framework*, "Defining Dynamic Approvals."

See *Approval Framework*, "Defining Dynamic Approvals."

Pages Used to Define Dynamic Approvals

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Approval Authorization	EOAW_AUTH	Set Up HRMS, Common Definitions, Approvals, Authorization, Approval Authorization Note. This page is available through PeopleTools but must be added to the portal navigation to render it available in the application.	Authorize roles and approvers for dynamic paths.
Setup Process Definitions	EOAW_PRCES_MAIN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Setup Process Definitions, Setup Process Definitions	Define workflow approval process stages. See Chapter 27, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions, page 676.
Criteria Definition	EOAW_CRITERIA	- Click the Definition Criteria link on the Setup Process Definitions page. - Click the Alert Criteria link on the Setup Process Definitions page. - Click the Criteria link in the Path section on the Setup Process Definitions page. - Click the Criteria link in the Steps section on the Setup Process Definitions page .	Define criteria for workflow approvals. Criteria definitions are used to define bits of logic that, at runtime, the Approval Framework evaluates for a Boolean result (true or false). See Chapter 27, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions, page 676.
Approval Path Definition	EOAW_PATH_SEC	Click the Details link within the Paths group box on the Setup Process Definitions page.	Set up workflow approval path details. See Chapter 27, "Setting Up and Working with Approvals," Defining Dynamic Approvals, page 683.

Page Name	Definition Name	Navigation	Usage
Approval Step Definition	EOAW_STEP_SEC	Click the Details icon within the Steps group box on the Setup Process Definitions page.	Define step details for approval workflow. See Chapter 27, "Setting Up and Working with Approvals," Administering Approvals, page 694.
User List Definition	EOAW_USER_LIST	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Maintain User Lists, User List Definition	Create and maintain user-list definitions used for routing transactions for approval. Also, define user sources for use with steps in the approval process. See Chapter 27, "Setting Up and Working with Approvals," Defining Users for Approvals, page 687.
Roles - General	ROLEDEFN	PeopleTools, Security, Permissions & Roles, Roles	Set up roles for workflow. <i>See Enterprise PeopleTools PeopleBook: Security Administration</i>
User Profile - General	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles, General	Set up user IDs and assign roles. <i>See Enterprise PeopleTools PeopleBook: Security Administration</i>

Defining Notification Templates for Approvals

To set up notification templates for approvals, use the Generic Templates (WL_TEMPLATE_GEN) component.

This section provides an overview of generic template definitions and list the pages used to define notification template definitions.

Understanding Generic Template Definitions

Anytime that the Approval Framework triggers an email notification, it constructs the email based on the notification rules that you have set on the Configure Transactions page. The engine bases the email on the template that you specify in the Template Name field in the Notifications group box on that page.

If you are using bind variables (%1, %2, %3 and so on) in your email notification template, you must also create an SQL object through PeopleTools Application Designer. The Approval Framework uses this SQL object to populate the bind variables that you define in your notification template. You assign an SQL object to an email notification through the SQL Object identifier fields on the Configure Transactions page.

The Approval Framework reserves the %1 bind variable as a placeholder for an auto-generated link within the email notification to an application component. If you do not want to display the auto-generated link in your email notification, exclude the %1 bind from the template variables that you list on the Generic Template Definition page.

See Also

Approval Framework, "Defining Notification Templates and Users for Approval Framework"

[Chapter 28, "Setting Up and Working with Delegation," Reviewing Delivered Notification Templates for Delegation, page 749](#)

Page Used to Define Notification Templates for Approvals

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Generic Template Definition	WL_TEMPLATE_GEN	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Generic Templates, Generic Template Definition	Enter generic template definitions.

Defining Users for Approvals

To set up users for approvals, use the User Profiles (USERMAINT) and Maintain User Lists (EOAW_USER_LIST) components.

This section provides an overview of user lists within Approvals and lists the pages used to define users for approvals.

Understanding User Lists within Approvals

A *user list* is a collection of users (PeopleSoft Operator IDs) expressed as the result of an SQL statement, PeopleSoft role, or PeopleSoft Application Class. User lists are used to represent the business process of your approval hierarchy on a transaction-by-transaction basis. PeopleSoft delivers pre-defined user lists. If none of the delivered user lists apply to your organization's hierarchy, then you can define your own using the Maintain User Lists component.

Delivered User Lists for HRMS

PeopleSoft Enterprise HRMS delivers the following common user lists for use with the Approval Framework:

<i>User List</i>	<i>Description</i>
By Department Manager	Uses the Manager ID field from the Department Profile page.

User List	Description
By Partial Pos Mgmt - Dept Mgr	Uses the Reports To field from the Job Information page and then the Manager ID field for that position and department from the Department Profile page.
By Partial Pos Mgmt - Suprvsor	Uses the Reports To field from the Job Information page and then the Supervisor ID field for that position from the same page.
By Position Management	Uses the Reports To field from the Job Information page.
By Supervisor ID	Uses the Supervisor ID field from the Job Information page.

Note. Refer to the corresponding documentation in your application-specific PeopleBooks for information about delivered user lists that are specific to an application.

Multiple Jobs and User Lists

PeopleSoft Enterprise HRMS delivers a series of user lists, or approval hierarchies, based on application class that is designed specifically for receiving and passing employee job information. These user lists correspond to the roles within an organization and enable you to select which job the Approval Framework uses to route approvals for employees with multiple jobs.

If an employee with multiple jobs encounters a job-related transaction during self-service approvals processing, the system prompts the employee to select the job for which she or he wants to process the transaction. For multiple job capability, the delivered user lists use an Application Class as the source for the user list, with the value of the Root Package ID field set to *HCSC_USERLIST_UTILS* and one of the following delivered Application Class Path values:

Application Class Path	Related User List Definition
HCSC_USERLISTS:GetApproversByPositionMgmt	By Position Management
HCSC_USERLISTS:GetApproversByDeptManager	By Department Manager
HCSC_USERLISTS:GetApproversByPosnDeptMgr	By Partial Pos Mgmt - Dept Mgr
HCSC_USERLISTS:GetApproversByPosnSupervisor	By Partial Pos Mgmt - Suprvsor
HCSC_USERLISTS:GetApproversBySupervisorId	By Supervisor ID

The delivered user lists correspond with different access types that PeopleSoft Enterprise Human Resources delivers with direct reports functionality. The system uses each of these delivered user lists in correspondence with how you define your direct report structure (by supervisor, by department, and so on).

If you define a custom user list and want multiple job capability, then you must use these same application root package ID and application class path values. PeopleSoft Enterprise HRMS supports multiple job capability *only* in the predefined user lists that we deliver.

Note. PeopleSoft Enterprise HRMS *does not* support multiple job capability for these custom user lists.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

Pages Used to Define Users for Approvals

Page Name	Definition Name	Navigation	Usage
User Profiles - Roles	USER_ROLES	PeopleTools, Security, User Profiles, User Profiles, Roles	Attach workflow roles to users. A role is a class of users who perform the same type of work, such as clerks, buyers, or managers. A role describes how people fit into workflow. Role user IDs determine how to route Worklist items to users and how to track the roles that users play in the workflow.
User Profiles - Workflow	USER_WORKFLOW	PeopleTool, Security, User Profiles, User Profiles, Workflow	Define workflow for user profiles. Use this page to define alternate users who are part of the workflow process. You can define alternate users to handle approvals during the absence of the primary approver and supervisor. Note. Refer to the <i>Setting Up and Working With Delegation</i> chapter if you are using the Delegation functionality and want to use the alternate user ID.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
User List Definition	EOAW_USER_LIST	Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Maintain User Lists, User List Definition	Create and maintain user-list definitions used for routing transactions for approval. Also, define user sources for use with steps in the approval process. Note. If you are using the Query option to define the user list for approval workflow, then, when you are creating the query in the Query Manager component, you must set the Query Type value of the query to <i>Process</i>. Setting the Query Type value to <i>User</i> can cause an error.

Setting Up the Notification and Escalation Manager

To set up notification and escalation, use the Define Event Types (EOAW_NEM_EVENTS), Define Events (EOAW_NEM), Event Status (EOAW_NEM_STATUS), and Schedule JobSet Definition (SCHDLDEFN) components.

This section provides an overview of notification and escalation, list the pages used to set up the Notification and Escalation manager, and discusses how to view event statuses.

Understanding Notification and Escalation

Notification and Escalation Manager (NEM) is a mechanism used to process notifications and escalations on a specified interval.

For example, escalations are used when an approver has not responded within a specified time period to a transaction that is pending approval. You can specify the time period (timeout) and you can specify alternate approvers to whom to notify and escalate the approval for further action. Timeout options are defined on the Approval Path Definition page.

Pages Used to Set Up the Notification and Escalation Manager

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Event Types	EOAW_NEM_EVENTS	Set Up HRMS, Common Definitions, Approvals, Notification and Escalation, Define Event Types, Define Event Types	Associate events to a server. See <i>Approval Framework</i> , "Using the Notification and Escalation Manager," Associating Events to a Server.
Define Events	EOAW_NEM_SETUP	Set Up HRMS, Common Definitions, Approvals, Notification and Escalation, Define Events, Define Events	Set up an escalation event and define the evaluation and action details. See <i>Approval Framework</i> , "Using the Notification and Escalation Manager," Setting Up an Escalation Event.
Event Status	EOAW_NEM_STATUS	Set Up HRMS, Common Definitions, Approvals, Notification and Escalation, Event Status, Event Status	View the status of an event.
Schedule JobSet Definition	SCHDLDEFN	PeopleTools, Process Scheduler, Schedule JobSet Definitions, Schedule JobSet Definition	Set up a NEM to define the job to run, and how often you want it to run. See <i>Approval Framework</i> , "Using the Notification and Escalation Manager," Setting Up a NEM.

Viewing Event Statuses

Access the Event Status page (Set Up HRMS, Common Definitions, Approvals, Notification and Escalation, Event Status, Event Status).

Event ID: ESCALATIONS		Log Delete Options	
Event Type: APPROVAL ACTIVITY EMAIL		This Event	All Events
Notification Manager			
		View All First 1-16 of 16 Last	
	DateTime Stamp	Matches	Detail
1	06/21/06 3:13:34PM	0	Invalid parameter 1 for function CreateRowset. (2,116) PTAF_NEM.Evaluator.OnExecute Name:EventEvaluation PCPC:871 Statement:15 Called from:PTAF_NEM_PRC.MAIN.GBL.default.1900-01-01.Step02.OnExecute Statement:27
2	06/21/06 3:19:48PM	0	Invalid parameter 1 for function CreateRowset. (2,116) PTAF_NEM.Evaluator.OnExecute Name:EventEvaluation PCPC:871 Statement:15 Called from:PTAF_NEM_PRC.MAIN.GBL.default.1900-01-01.Step02.OnExecute Statement:27
3	06/21/06 3:25:05PM	0	Invalid parameter 1 for function CreateRowset. (2,116) PTAF_NEM.Evaluator.OnExecute Name:EventEvaluation PCPC:871 Statement:15 Called from:PTAF_NEM_PRC.MAIN.GBL.default.1900-01-01.Step02.OnExecute Statement:27

Event Status page

Log Delete Options

- This EventClick to delete all notification event logs for the event ID that you selected.
- All EventsClick to delete all notification event logs for all events.

Notification Manager

- DateTime StampUsed in the Status record to track the results of each instance run.
- MatchesDisplays the number of rows that are returned from a row set.
- DetailDisplays detailed status messages for each notification event.

Setting Up Security for Approvals

After you define all necessary objects in PeopleTools Application Designer and complete the required setup in the application components, you must ensure the proper setup of the applicable permissions lists, roles, and web libraries.

This table describes the delivered permission lists for the approval framework:

Permission List Name	Description	Roles Attached To
HCCPSCAW1010	This is the approvals administrator permissions list. It grants permissions for Approval Framework administration and configuration objects. These objects include all components under the menu path Set Up HRMS, Common Definitions, Approvals. PeopleSoft delivers this list already attached to the Approval Framework administrator role. You should also attach this permission list to any existing, application-specific administrator roles in your organization for which you want the administrators to inherit this permission list.	Approval Framework administrator
HCCPSCAW1020	This is the manager permissions list. It grants permissions for Approval Framework manager objects. These objects include several manger-specific self-service pages. PeopleSoft delivers this list already attached to the manager role. Any of your application-specific users who are considered managers and have the manager role assigned to them will automatically inherit this permission list.	Manager
HCCPSCAW1030	This is the employee permissions list. It grants permissions for Approval Framework employee objects. These objects include several employee-specific self-service pages. PeopleSoft delivers this list already attached to the employee role. Any of your application-specific users who are considered employees and have the employee role assigned to them will automatically inherit this permission list.	Employee

PeopleSoft Enterprise HRMS delivers the AWE Administrator role. This role already has the HCCPSCAW1010 permission list assigned to it. However, this role is not attached to any users as delivered. If you *do not* have an application-specific administrator role, then you can use this role by attaching it to any application-specific administrator users that you have. If you *do* have an application-specific administrator roles within your organization, then PeopleSoft recommends that you simply attach the HCCPSCAW1010 permission list to that role.

To enable users to view additional information about Approval Framework participants through the approvals status monitor, you must assign users the correct permissions. Because of the manner in which the system displays the approvals status monitor, you must also grant access to the WEBLIB_PTAF web library for the appropriate product permission lists. Also, for users to be able to use the EMC functionality that is part of the Approval Framework, you must grant permission lists full access to the WEBLIB_EOAW web library. PeopleSoft Enterprise HRMS delivers these two web libraries as part of the delivered Approval Framework permission lists.

To grant permission lists access to web libraries:

1. Navigate to PeopleTools, Security, Permissions & Roles. Permission Lists.
2. Select the permission list for which you want to grant access to web libraries.
3. On the Web Libraries page, insert a new row for the web libraries WEBLIB_PTAF and WEBLIB_EOAW.
4. For each web library, click the Edit link.

The system displays the Weblib Permissions page.

5. Click the Full Access (All) button to grant access to all functions, or complete the Access Permissions field to grant access to specific script functions.
6. Click OK.
7. Save the permission list.

Note. The Approval Framework assumes each person in the system has one valid operator ID. If you are using the approval process and allow your employees to have more than one operator ID, make sure they have the same roles and permission lists.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Administering Approvals

The approval monitor gives administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

This section provides overviews of approvals administration and discusses how to administer approvals.

See Also

Chapter 34, "Setting Up and Working with Self-Service Transactions," (USF) Reviewing Federal Self-Service Transactions, page 841

Understanding Approvals Administration

The Administer Approvals component gives approvals administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

Actions available for the approvals administrator are:

Reassignment	Allows the approvals administrator to reassign pending approvals to a new approver based on search criteria.
Approve	Allows the approvals administrator to act on behalf of the assigned approver. The approval is initiated for a specific user, wherever that user may be pending within a specific transaction. Once the administrator takes action, the approval resumes the approval process.
Denial	Allows the approvals administrator to act on behalf of the assigned approver. The denial is initiated for a specific user, wherever that user may be pending within a specific transaction.
Ad Hoc	Allows the approvals administrator to add a reviewer or approver to a specific transaction in serial or parallel with existing approvers. For serial approvals, each approval in the process is sequential. Users can add approvers and reviewers only after the current pending step or later. For parallel approvals, the sequence does not matter. Users can insert an ad hoc step in an ad hoc path in any currently pending or subsequent stage. The approvals administrator can add or remove ad hoc approvers once the transaction is submitted. The Approval Framework launches the previewed approval process instance if requested by the application developer's code. If you have an ad hoc approver user list defined on the Configure Transactions page, only the users within that list can be added as an ad hoc approver or reviewer.

Source End Actions

When a request is approved, the engine notifies the application, which then takes source end actions:

- End actions.

An approval of one transaction often leads to the creation of another transaction, or triggers another business process. The Approval Framework supports this trigger by providing a call-back mechanism for event notification. For example, when a promotion is approved, it can be sourced—an action follows final approval, which is the end action.

- Line-level versus header-level end actions.

Use line-level approvals to make it possible for an action to be taken on different line items upon their approval, without waiting for the approval of other line items in the transaction. You can source line items as soon as they are approved.

This action is possible only if line-level approval routings are at the end of the process and require no further review. In this case, the application can act on the individual lines as they get approved. The Approval Framework notifies the application of significant approval-related events.

Header actions allow the transaction lines to be grouped together and processed as one unit.

Approval Reassignment

You can reassign pending tasks to another approver, or an administrator can reassign all tasks that belong to a specific approver to another approver. Use reassignment in the following situations:

- The approver chooses to redirect the task to another approver, thus delegating a specific task (step) to another approver.
- The approvals administrator decides to reassign all pending tasks within a step that belong to an approver to another approver.

This reassignment usually occurs when an approver is unexpectedly absent and the approvals administrator reassigns all pending tasks to another.

When you redirect a workflow task to another approver, you can modify the approval process map.

Note. The Approval Framework is set up for administrative reassignment and escalations only.

Pages Used to Administer Approvals

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Monitor Approvals	EOAW_ADM_MON_SRC	Workforce Administration, Self Service Transactions, Approvals and Delegation, Administer Approvals, Monitor Approvals	Approvals administrators can search on approval processes and perform mass reassignments.
Monitor Approvals	EOAW_ADM_MON_ACT	Click the link for the approval step in the Modified column on the Monitor Approvals page.	Approvals administrators can perform an action on a specific approval process.

See Also

Approval Framework, "Using the Approval Monitor"

Administering Approvals

Access the Monitor Approvals page for a view of the approval process (Workforce Administration, Self-Service Transactions, Approvals and Delegation, Administer Approvals, Monitor Approvals).

Monitor Approvals

▼ Search Criteria

Approval Process:

Definition ID:

Header Status:

Approved

▼

Last Modified:

Approver:

Approver Status:

▼

Originator:

Requester:

Search

▼ Administrative Actions

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Approver's Oper ID:

☐ Allow Auto Approval

Reassign To:

☐ Allow Self-Approval

Comment:

Reassign Selected

Approve Selected

Deny Selected

Monitor Approvals page (1 of 2)

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Search Results

[Select All](#)
[Deselect All](#)

Approval Process: Delegation

Delegator Emplid:

Delegator Record Number:

Transaction Name:

Transaction Type:

From Date:

		Modified	Status	Delegator Emplid	Delegator Record Number	Transaction Name	Transaction Type	From Date
1	☐	2009-05-15	Approved	HXCMPDEL06	0	WCSCompSubmitter	!	2009-05-15
2	☐	2009-05-21	Approved	HXCMPDEL06	0	WCSCompConfirmer	!	2009-05-21
3	☐	2009-05-21	Approved	HXCMPDEL06	0	WCSCompReviewer	!	2009-05-21
4	☐	2009-05-21	Approved	HXCMPDEL04	0	WCSCompReviewer	!	2009-05-21
5	☐	2009-05-20	Approved	N30017	0	JobOpening	A	2009-05-20
6	☐	2009-05-20	Approved	N30017	0	JobOffer	A	2009-05-20
7	☐	2009-05-20	Approved	N30002	0	JobOffer	A	2009-05-20
8	☐	2009-05-15	Approved	HXCMPDEL06	0	WCSCompSubmitter	!	2009-05-15
9	☐	2009-05-15	Approved	HXCMPDEL07	0	WCSCompSubmitter	!	2009-05-15
10	☐	2009-05-15	Approved	HXCMPDEL04	0	WCSCompReviewer	!	2009-05-15

Monitor Approvals page (2 of 2)

For a complete description of this page, see *PeopleSoft Enterprise Human Resources PeopleBook: Approval Framework*, "Using the Approval Monitor."

See *Approval Framework*, "Using the Approval Monitor," Using the Approval Monitor Search Page.

Administrative Actions

Approver's Oper ID (approver's operator ID) Select the operator ID of the approval to whom the approval transaction is assigned.

Reassign To Select the operator ID of the person to whom you want to reassign approval transactions for the specified approver in the Approver's Oper ID field.

Allow Auto Approval	Select to allow auto approval of approval transactions that are assigned to the specified approver.
Allow Self-Approval	Select to allow the specified approver to approve transactions on their own behalf.
Comment	Enter a comment to describe the mass reassignment. The comment becomes part of the transaction itself.
Reassign Selected	Click to reassign the approval transactions from approver in the Approver's Oper ID field to the person specified in the Reassign To field. The system reassigns only the approval transactions that you have selected in the search results.

Search Results

The system displays a unique section for each approval process that has approval transactions meeting your search criteria. Each section contains key fields that are unique to the specific approval process. You can filter your search results within a section by specifying key values and clicking the Filter button.

Select All	Click to select all approval transactions that are listed in your search results.
Deselect All	Click to clear the selection of all transactions in your search results.
Filter	Specify key values and then click the Filter button to narrow your search results within an approval process section.
Modified	The system displays the date when the approval transaction was last modified. If the approval transaction has never been modified, the system displays <i>Never</i> .
Status	The system displays the status of the approval transaction: <i>Pending</i> , <i>Denied</i> , <i>Terminated</i> , or <i>Approved</i> .
<Key Values>	The system displays key values for each of the approval transactions that meet your search criteria. Key values vary depending on the approval process.

Generating an Approvals Audit Report

This section provides an overview of the Approvals audit report, lists the page used to run the Approvals Audit Report, and discusses how to generate an approvals audit report.

Understanding the Approvals Audit Report

The Approval Framework produces an audit trail for each approval transaction as the transaction passes through the approval process. This audit trail includes tracking the distinction between the actions of the original approver and his or her proxy. The Approvals Audit Report Application Engine process (HCSC_AWE_ADT) creates an audit report based on this audit trail and the run criteria that you enter on the Approvals Audit Report page.

The Approvals Audit Report (AWEAUDIT) report includes the following data regarding approval transaction requests as applicable:

- Transaction number, which the Approval Framework automatically assigns to each approval transaction request.
- Approval process ID, which is defined during setup of the approval process.
- Approval definition ID, which is defined during the setup of the approval process.
- Current approver's name, if the request is still pending.
- Current request status.
- Requestor's or originator's name.
- Proxy and delegator's names, if applicable.
- Requestor's or originator's employee ID.
- Each approver's name.
- Transaction submit date.
- Transaction completion date.

Enter data into one or more of the fields to filter your report results. If you leave a field blank, the report process includes results for all possible values pertaining to that criterion. For example, if you specify the range of dates for which requests were submitted as January 1, 2009 to December 31, 2009, and a specific originating requester, then the system generates a report that includes all transactions requested by that person for 2009, regardless of approval process ID and approval definition ID.

You can view the report online in PDF format, print the report, save it, or rerun the report using different filtering criteria. You can also download the report to your local machine as a TXT, XLS, or CSV file. The top of the report displays the date and time stamp of when it was generated and a summary of the filter data selected. The report sorts the data by request submit date.

Page Used to Run the Approvals Audit Report

Page Name	Definition Name	Navigation	Usage
Approvals Audit Report	HCSCAWE_RUN_CNTL	Workforce Administration, Self-Service Transactions, Approvals and Delegation, Approvals Audit Report, Approvals Audit Report	Generate an approvals audit report that provides a complete list of approval transactions that have passed through the Approval Framework based on your run criteria.

Generating an Approvals Audit Report

Access the Approvals Audit Report page (Workforce Administration, Self-Service Transactions, Approvals and Delegation, Approvals Audit Report, Approvals Audit Report).

Approvals Audit Report

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Filters

Submitted After :

Submitted Before :

Approval Process ID :

Approval Definition ID :

Requested By :

Transaction Status :

Approvals Audit Report page

Submitted After and Submitted Before Enter a date range for which you want to include approval transaction requests in the audit report.

Approval Process ID Select an approval processes ID to filter your report results to a specific type of approval transaction.

Approval Definition ID Select a specific approval process definition for which you want to filter your report results.

Requested By Select a requester to filter your report results to approval transaction requests submitted by a specific person.

Transaction Status Select a status to filter your report results to approval transaction requests that currently have the selected status.

Sample Approvals Audit Report

The following is a sample of the Approvals Audit Report:

ORACLE®				
Approval Workflow Transactions Audit Report				
Process ID: AbsenceManagement Definition ID: SHARE Thread ID: 2				
Transaction Originator	HCQAMAM0001			
Transaction Requestor	HCQAMAM0001			
Overall Transaction Status	P - Pending			
Parent Thread Number	2			
Last Updated On	2006-05-11T10:57:10.000000-0700			
Stage Number: 1 Path Number: 1 Step Number: 1.00				
Step Type	N - Normal			
Step Status	A - Approved			
Ad Hoc Step Inserted By				
Participants				
Approver	Approved by	User Type	Step Stat	Completed On
HCQAMAM0002	HCQAMAM0002	A - Approver	A - Approved	2006-05-11T10:57:10
Stage Number: 1 Path Number: 1 Step Number: 2.00				
Step Type	N - Normal			
Step Status	P - Pending			
Ad Hoc Step Inserted By				
Participants				
Approver	Approved by	User Type	Step Stat	Completed On
HCQAMAM0003	HCQAMAM0003	A - Approver	P - Pending	2006-05-11T10:57:10
Comments				

Approvals Audit Report (1 of 2)

User	Comment Date	Comments
HCQAMAM000	2006-05-11T10:57:10.000000-0700	have an all day appointment
HCQAMAM0002	2006-05-11T10:57:10	approve this request

Approvals Audit Report (2 of 2)

Note. You can configure this report through the PeopleTools XML Publisher functionality.

Working with Self-Service Approval Transactions

This section lists the pages used to work with self-service approval transactions and discusses how to:

- Review approval transaction requests.
- Select a job for approval transaction requests.

Important! This section lists only the self-services pages for approval transactions that are common across multiple applications within the HRMS product line. For details about self-service pages that are specific to business processes within an application, refer to application-specific PeopleBooks.

Pages Used to Work with Self-Service Approval Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Review Transactions	HCM_APPR_STATUS	• Manager Self Service, Review Transactions, Review Transactions • Self Service, Review Transactions, Review Transactions	Manager and employees can view the status and details of approval transactions requests that are associated with them.
Select Job	HCM_JOB_SELECT	The system displays this page when a user submits or approves an request and the user has multiple jobs.	Users with multiple jobs can select the job for which they want to submit or approve an approval requests.

See Also

Chapter 28, "Setting Up and Working with Delegation," Working with Self-Service Delegation, page 733

Reviewing Approval Transaction Requests

Access the Review Transactions page (Manager Self Service, Review Transactions, Review Transactions or Self Service, Review Transactions, Review Transactions).

Review Transactions

Betty Locherty

This page allows you to view the status and relevant information for any transaction you either submitted for approval or have reviewed yourself. For each request you can get detailed information by selecting the hyperlink.

Transactions:

Approval Transactions					Find	First	1-2 of 2	Last
Transaction Name	Submitted By	Submitted For	Submitted On	Thread Status				
Person profile	Cynthia Adams	Cynthia Adams	6/16/2009 - 4:41 PM	Pending	Approve/Deny			
Transaction Details								
JPM_JP_TRAN_NUM	HR_TM_PROFILE_ID							
279	100850							
Transaction Name	Submitted By	Submitted For	Submitted On	Thread Status				
Delegation	Betty Locherty	Antonio Santos	6/16/2009 - 4:44 PM	Pending	View Details			
Transaction Details								
DELEGATOR_ID	DELEGATOR_RCD	FROM_DATE	TRANSACTION_NAME	HCDL_TNS_TYPE				
KU0010	0	2009-09-21	HR_PROMOTION	A				

Review Transactions page

Users can view the status and details of approval transaction requests that are pending their approval, approved, denied, or terminated. The system displays the results in the grid. For each transaction in the grid, users can click the View Details link or the Approve/Deny link to access pages where they can review details of the transactions and take further action in the approval process.

Note. For archiving transactions that are stored in the Approval Framework, PeopleSoft recommends using the PeopleTools Archive manager component.

Selecting a Job for Approval Transaction Requests

Access the Select Job page (the system displays this page when a user submits or approves an request and the user has multiple jobs).

Create Delegation Request

Select Job Title

Danilo Travantti

Please select the job title below for which you wish to review or create delegation requests.

Job Information			
Job Title	Department	Supervisor Name	Company
☒ Sales Manager	Sales Administration	Antonio Smith	Global Business Institute 9999
☐ Bus Person	Business Services	Paul Harvest	Global Business Institute 9999

Continue

Cancel

Example of a Select Job Title page

If a user submits or approves a transaction and the user has multiple jobs, the user can select the job for which to submit or approve the transaction so that the system can route the request to the appropriate people.

Chapter 28

Setting Up and Working with Delegation

This chapter provides an overview of delegation and discusses how to:

- Navigate delegation components.
- Register workflow transactions.
- Set up permission lists and roles for delegation.
- Define delegation installation settings.
- Configure delegation transactions.
- Add delegation requests.
- Administer delegations.
- Process batch delegation requests.
- Work with self-service delegation.
- Review delivered notification templates for delegation.

Understanding Delegation

Delegation is when a person authorizes another to serve as a his or her representative for a particular task of responsibility. With the Delegation feature, users can authorize other users to perform managerial tasks on their behalf by delegating authority to initiate or approve managerial transactions.

Delegation of authority to perform managerial transactions is usually prompted by one of these scenarios:

- A manager takes leave and wants to delegate authority of managerial transactions to another person while away from the office.
- A senior executive does not have the time to process transactions and wants to delegate this authority to another person, such as an assistant.

Delegation Terminology

The following terms are important to the understanding of Delegation feature and are used throughout the chapter:

Delegation	The act a delegating one's authority to another user.

Delegator	A person that delegates authority to another user.
Proxy	A person granted authority to act on behalf of another user.
Delegate Initiation	The Delegation Framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf.
Delegate Approvals	The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.
Delegated Authority	The rights and privileges that are delegated from the delegator to the proxy.
Delegation Request	A request from the delegator to the proxy to take on delegated authority.
Delegation Period	The time range in which the delegated authority is in effect.
Delegation Administrator	The system administrator who is responsible for configuring, managing, and maintaining delegated authorities.
Revoke	When a delegator or delegation administrator withdraws delegated authority.

Delegation Framework

The core of the Delegation feature is the Delegation framework. The Delegation framework manages a proxy's authority over a delegated transaction. When a proxy has delegated authority, the Delegation framework temporarily assigns the proxy a unique role that is specific to the delegated transaction. The role enables the proxy to access the components and pages associated with the delegated transaction. When the proxy no longer has delegated authority, the Delegation framework removes that role and thus prevents the proxy from performing the transaction.

The Delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct report or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy

Integration with the Approval Framework

The Delegation framework integrates with the Approval Framework. This integration provides several benefits. First, the integration between the Delegation framework and Approval Framework makes the Approval Framework aware of delegated authorities in the system. Second, the Delegation framework uses the Approval Framework to manage the acceptance and rejection of delegation requests.

Delegation Request Creation Through Self-Service

The Delegation framework is a component of the PeopleSoft Enterprise HRMS self-service solution. Users can create delegation requests for selected transactions through HCM self-services pages.

When creating a delegation request, the delegator can:

- Delegate only the transactions to which they have access.
For example, an employee who is not a manager does not have access to manager self-service transactions and, therefore, cannot delegate manager-specific transactions.
- Delegate to only one proxy per delegation period per transaction.
- Delegate all transactions to a single proxy, or delegate different transactions to different proxies.

Delegation Administration

Delegation administrators can use the administrative components for delegation to perform several useful tasks. They can:

- Create delegation requests on behalf of delegators through the Add Delegation Request component (HCDL_ADMIN_ADD_DLG).
- Review delegation requests and, if necessary, revoke them on behalf of delegators through the Administer Delegation component (HCDL_ADMIN_DLG).
- Process all delegation transactions in batch daily through the Maintain Delegated Authorities component (HCDL_BATCH).

Notifications

The system uses email and worklist notifications to notify managers and proxies of new delegation requests and transactions pending approval. The system creates a worklist item only on the proxy's worklist, not on the delegator's worklist (provided that you have set up worklist items as a preference for receiving notifications). The system sends email notifications for approval to the proxy and, if approval framework is configured correctly, the system also sends the delegator a courtesy email notification. Delegation administrators can use the Generic Templates component to configure different email templates for the proxy and delegator.

See [Chapter 28, "Setting Up and Working with Delegation," Reviewing Delivered Notification Templates for Delegation, page 749.](#)

Requests Statuses and Delegation Statuses

The Delegation framework manages delegation requests through request statuses and delegation statuses. A request status defines the status of the delegation request. A delegation status defines whether a proxy's delegation authority is active or inactive. The combination of these two statuses determines how the Delegation framework handles delegations.

This table lists request statuses for delegation and describes how the Delegation framework handles a delegation depending on the delegation status associated with each request status:

<i>Request Status</i>	<i>Delegation Status</i>	<i>Description</i>
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to <i>Submitted</i> and delegation status to <i>Inactive</i> .
Accepted	Active	When a proxy accepts a delegation request, the system sets the request status to <i>Accepted</i>. The delegation status becomes <i>Active</i> only when the following two conditions occur: • The proxy accepts the delegation request. • The system date is greater than or equal to the From Date and less than or equal to the To Date of the delegation period. Once the delegation status becomes <i>Active</i>, the system reassigns all pending transactions from the delegator to the proxy. The system also assigns the proxy a temporary permission list and role for the transaction, which grants the proxy navigation access to the online transaction. If the To Date of the delegation request is blank, the request status remains <i>Active</i> until revoked by delegator or administrator.
Accepted	Inactive	If the proxy accepts the delegation request but the delegation request is future-dated, the delegation status remains <i>Inactive</i> until the system date is greater than or equal to the From Date.
Rejected	Inactive	When a proxy rejects a delegation request, the system sets the request status to <i>Rejected</i> . The delegation status remains <i>Inactive</i> .

<i>Request Status</i>	<i>Delegation Status</i>	<i>Description</i>
Ended	Inactive	When the delegation authority period for the proxy expires, the system sets the request status to <i>Ended</i> and changes the delegation status to <i>Inactive</i>. This change occurs when the system date is greater than the To Date of the delegation authority period. The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.
Revoked	Inactive	When the delegator revokes a delegation request or the delegation administrator revokes the delegation request on behalf of the delegator, the system sets the request status to <i>Revoked</i> and changes the delegation status to <i>Inactive</i>. The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.

Implementation Considerations for Delegation

When implementing Delegation functionality, you should consider the following:

The important considerations are:

- Should you enable delegation functionality?
- What transactions should you enable for delegation?
- What hierarchy should you enable for delegation?

You should also analyze the following security needs and create a plan that covers these needs:

- Analyze delivered permission lists and roles for delegation components to decide if the implementation will use the delivered objects or create new objects.
- Decide how to define a standard user profile for the delegation administrator that contains the relevant roles.
- Decide how to define a standard user profile for the delegator that contains the relevant roles.
- Decide how to define a standard user profile for the proxy that contains the relevant roles.

- Decide if the delegator and proxy should have the same or different profiles.

Steps to Set Up Delegation

To implement transactions in the delegation framework:

1. Register delegation transactions for workflow on the Register Workflow Transactions page.
2. Set up delegation permission lists and roles through PeopleTools Security components.
3. Define installation settings for delegation on the Delegation Installation Settings page.
4. Configure transactions for delegation on the Configure Delegation Transactions page.

Navigating Delegation Components

The PeopleSoft Enterprise HRMS application provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the PeopleSoft Enterprise HRMS custom navigation pages, the PeopleSoft system provides menu navigation and standard navigation pages.

This section lists the pages used to navigate delegation components.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate Delegation Components

This table lists the custom navigation pages that are used to navigate in the setup and administrative components for delegation functionality:

Page Name	Navigation	Usage
Delegation Setup Center	Set up HRMS, Common Definitions, Delegation, Delegation Setup Center	Administrators can use the component links on this page to access the pages necessary to set up the Delegation framework for PeopleSoft Enterprise HRMS.
Approvals and Delegation	Workforce Administration, Self Service Transactions, Approvals and Delegation	Administrators can use the component links on this page to access the pages necessary to maintain delegation and to monitor approval transactions for PeopleSoft Enterprise HRMS.

Registering Workflow Transactions

This section discusses how to register workflow transactions.

Page Used to Register Workflow Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workflow Transactions	HCM_EO_TXN	- Set Up HRMS, Common Definitions, Approvals, Approvals Setup Center, Workflow Transactions, Workflow Transactions - Set Up HRMS, Common Definitions, Approvals, Workflow Transactions, Workflow Transactions	Register workflow transactions for self-service transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category. For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval.

See Also

[Chapter 27, "Setting Up and Working with Approvals," Linking Workflow Transactions, page 669](#)

Registering Workflow Transactions

Access the Workflow Transactions page (Set Up HRMS, Common Definitions, Delegation, Delegation Setup Center, Workflow Transactions, Workflow Transactions).

Workflow Transactions					
Workflow Transactions					
*Transaction Name	*Category	Description	Delegate Initiation		
EP_CREATE	HR_TRANSACTIONS	Appraisals by Dflt Access Type	☐	+	-
EP_CREATE_GRP	HR_TRANSACTIONS	Appraisals by Group ID	☐	+	-
GPCH_ABSENCE	HR_TRANSACTIONS	Absence	☐	+	-
GPCH_ABSENCE_MGR	HR_TRANSACTIONS	Absence by Manager	☐	+	-
GPCH_OVERTIME	HR_TRANSACTIONS	Overtime	☐	+	-
GPCH_OVERTIME_MGR	HR_TRANSACTIONS	Overtime by Manager	☐	+	-
GP_ABS_EESS_BAL	HR_TRANSACTIONS	Employee Absence Balance	☒	+	-
GP_ABS_EESS_HIST	HR_TRANSACTIONS	Employee Absence History	☒	+	-
GP_ABS_EESS_REQ	HR_TRANSACTIONS	Employee Absence Request	☒	+	-
GP_ABS_MGRSS_BAL	HR_TRANSACTIONS	Manager Absence Balance	☒	+	-

Workflow Transactions page (1 of 3)

In the grid below, insert a row for each transaction that will use the Approval Workflow Engine (AWE) and the Delegation Framework. Transactions can not be registered in both the Workflow Transactions and the AWE and Delegation Transactions grids.

Approval Workflow Engine (AWE) and Delegation Transactions				
Details1 Details2				
*Transaction Name	*Category	Description		
EP_APPRAISAL	HR_TRANSACTIONS	Performance Document	+	-
GP_SS_ABS_APPR_L	HR_TRANSACTIONS	Manager Absence Approve	+	-
HR_MIL_RANK_CHG	HR_TRANSACTIONS	Military Rank Change	+	-
HR_PROMOTION	HR_TRANSACTIONS	Promotion	+	-
HR_REPORT_CHG	HR_TRANSACTIONS	Reporting Change	+	-
HR_TRANSFER	HR_TRANSACTIONS	Transfer	+	-
JPMNonpersonProfiles	HR_TRANSACTIONS	Nonperson Profiles	+	-
JPMPersonProfiles	HR_TRANSACTIONS	Person Profiles	+	-
JobOffer	HR_TRANSACTIONS	Job Offers	+	-
JobOpening	HR_TRANSACTIONS	Job Openings	+	-
TL_MSS_EE_SRCH_PRD	HR_TRANSACTIONS	Manage Reported Time	+	-
TL_SRCH_APPRV_GRP	HR_TRANSACTIONS	Manage Payable Time	+	-
WCS_ECM_AWE_HOME	HR_TRANSACTIONS	Compensation Approvals	+	-

Workflow Transactions page: Details1 tab (2 of 3)

Approval Workflow Engine (AWE) and Delegation Transactions					
Details1		Details2			
*Transaction Name	*Approval Process ID	Delegate Initiation	Delegate Approvals		
EP_APPRAISAL	PerformanceManagement	☐	☒	+	-
GP_SS_ABS_APPR_L	Absence_Mgmt_BySuperv	☐	☒	+	-
HR_MIL_RANK_CHG	MilitaryRankChange	☐	☒	+	-
HR_PROMOTION	PromoteEmployee	☒	☒	+	-
HR_REPORT_CHG	ReportingChgEmployee	☒	☒	+	-
HR_TRANSFER	TransferEmployee	☒	☒	+	-
JPMNonpersonProfiles	JPMNonpersonProfiles	☐	☐	+	-
JMPPersonProfiles	JMPPersonProfiles	☐	☐	+	-
JobOffer	JobOffer	☐	☒	+	-
JobOpening	JobOpening	☐	☒	+	-
TL_MSS_EE_SRCH_PRD	TLReportedTime	☒	☒	+	-
TL_SRCH_APPRV_GRP	TLPayableTime	☐	☒	+	-
WCS_ECM_AWE_HOME	ApproveCompensationProc	☒	☒	+	-

Workflow Transactions page: Details2 tab (3 of 3)

Note. When implementing the Delegation framework, you must register all self-service transactions. Only the registered workflow transactions that you enable for delegation initiation or approval are available for subsequent delegation transaction setup.

See [Chapter 27, "Setting Up and Working with Approvals," Linking Workflow Transactions, page 669.](#)

Setting Up Permission Lists and Roles for Delegation

This section provides an overview of permission lists and roles for delegation and discusses how to set up permission lists and roles.

Understanding Permission Lists and Roles for Delegation

Before configuring delegation transactions, you must set up permission list and role security for your delegation transactions. The PeopleSoft Enterprise HRMS application delivers as system data several permission lists that are required for use of the Delegation framework. You can attach these permission lists to roles where needed to enable users access to delegation functionality.

This table describes the delivered permission lists for the Delegation framework:

Permission List Name	Description	Roles Assigned to Permission List
HCCPDL1000	Enables users to access the delegation setup components that are part of the Delegation Setup Center page and the delegation administrative components that are part of the Approvals and Delegation page.	HCM Delegation Admin (administrator)
HCCPDL1100	Enables users to access the Manage Delegation page, which is the home page for self-service transactions.	Manager Employee

In addition to permission lists, you need to define the delegation administrator role and assign the HCCPDL1000 permission list to it. Once assigned to a user, this role enables that designated delegation administrator access to the delegation setup and administrative components. The PeopleSoft Enterprise HRMS system delivers the HCM Delegation Admin role as system data for this purpose. This role already has the HCCPDL1000 permission list assigned to it.

PeopleSoft Enterprise HRMS applications that use delegation functionality deliver many transactions that are preconfigured for the Delegation framework. These transactions are preconfigured with a unique permission list and role for each component where the proxy can perform the delivered delegated transaction. When a proxy status becomes active, the system inserts the unique role for that delegation transaction into the proxy's user profile. The role contains the permission list that enables the proxy access to the component for performing the delegated transaction. When the proxy status becomes inactive, the system removes that role from the proxy's user profile. To configure delegation transactions, use the Configure Delegation Transaction page to associate to the transaction the unique role and the component where the transaction is performed. The unique permission list is associated with the role in PeopleTools security.

See [Chapter 28, "Setting Up and Working with Delegation," Configuring Delegation Transactions, page 722.](#)

When configuring transactions for delegation you must use a unique role and permission list for each component that you associate with a delegated transaction. You must attach the permission list to portal security for the component and associate the unique role with the unique permission list. You might also need to run the Portal Security Sync process (PeopleTools, Portal, Portal Security Sync) to ensure that the permission list is associated with the portal navigation.

Warning! Do not use an existing role to configure a delegation transaction because the delegation framework grants and revokes the role from the proxy's security profile according to the proxy's delegated authority over a transaction. This will cause a proxy who already has access to the specified component to lose access to that component entirely when the delegation framework revokes the delegated authority.

See Also

[Chapter 28, "Setting Up and Working with Delegation," Configuring Delegation Transactions, page 722](#)

Setting Up Permission Lists and Roles

Set up permission list and role security for your delegation transactions.

See *Enterprise PeopleTools PeopleBook: Security Administration*

Defining Delegation Installation Settings

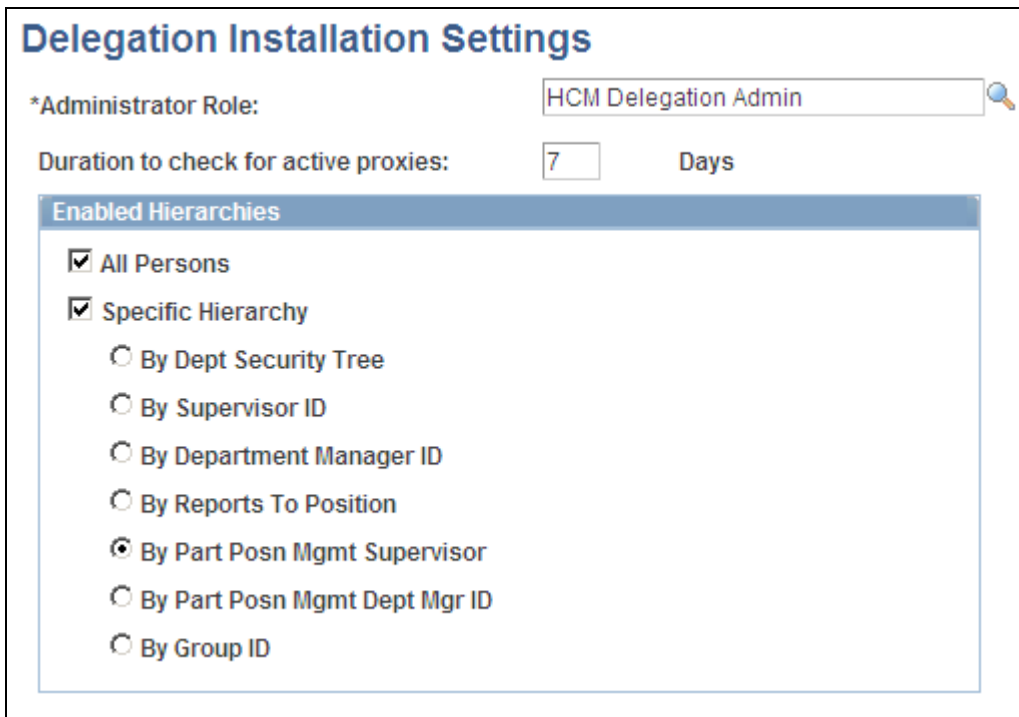
This section discusses how to define delegation installation settings.

Page Used to Define Delegation Installation Settings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Delegation Installation Settings	HCDL_SYS_SETUP	- Set Up HRMS, Common Definitions, Delegation, Delegation Setup Center, Installation Settings, Delegation Installation Settings - Set Up HRMS, Common Definitions, Delegation, Installation Settings, Delegation Installation Settings	Define delegation installation settings. This task is typically performed by the delegation administrator after someone has set up permission lists and roles for delegation.

Defining Delegation Installation Settings

Access the Delegation Installation Settings page (Set Up HRMS, Common Definitions, Delegation, Delegation Setup Center, Installation Settings, Delegation Installation Settings).



Delegation Installation Settings

*Administrator Role: HCM Delegation Admin

Duration to check for active proxies: 7 Days

Enabled Hierarchies

- ☒ All Persons
- ☒ Specific Hierarchy
 - ☐ By Dept Security Tree
 - ☐ By Supervisor ID
 - ☐ By Department Manager ID
 - ☐ By Reports To Position
 - ☒ By Part Posn Mgmt Supervisor
 - ☐ By Part Posn Mgmt Dept Mgr ID
 - ☐ By Group ID

Delegation Installation Settings page

Administrator Role

Select the role that you want to designate as the delegation administrator. The delegation framework routes errors to this role. The PeopleSoft system delivers the HCM Delegation Admin role as system data for this purpose. You can select that role or any other role.

Duration to check for active proxies and Days

Enter the number of days that you want the Maintain Delegated Authority Application Engine process to add to the system date when checking whether a proxy is active in the job data record or equivalent record for persons of interest. Delegation administrators can run this process from the Maintain Delegated Authority page.

Checking for proxy availability is particularly important when using open-ended delegations. An open-ended delegation is when the delegator leaves the To Date field blank on the Enter Dates page when creating a delegation request through self-service.

By default, the system uses 7 days. If you leave the field blank or enter 0, then upon saving the component the system automatically sets the value to 7. In this example, when delegation administrators run the batch job, the process adds seven days to the system data and checks for proxy availability on that date.

Enable Hierarchies

Use this group box to define options for how self-service users can select a proxy when delegating a transaction. Your selections here determine the available proxies that the system displays on the Select Proxy By Hierarchy page when users create delegation requests. These settings apply to all transactions that are using the Delegation framework. For example, you cannot specify that the system display available proxies for time-off requests by supervisor ID and available proxies for promotions by Reports To Position.

All Persons

Select this check box to enable open selection of the proxy when users are creating a delegation request. The system displays the Search by Name link on the Select Proxy By Hierarchy page. When users click this link, the system displays the Select Proxy By Name page, where users can search for and select as proxy any active person in the system. By default, the system selects this check box.

Specific Hierarchies

Click this check box to require delegators to select a proxy based on a specific hierarchy. You can only select one hierarchy. The hierarchy that you select applies to all delegation requests across the system regardless of the transaction type. When self-service users search for a proxy by hierarchy, they can search up the hierarchy as well as down the hierarchy.

Your choices are:

- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.
- *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page (DEPARTMENT_TBL_GBL). For users who are department managers, the system displays a list of the workers who are in the user's department.
- *By Reports To Position:* Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position.

This option is available only if you have enabled the Manage Positions business process on the Installation Table - HRMS Options page.

- *By Part Posn Mgmt Supervisor:* Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial position management. The system searches for reporting relationship based on Report To values first, and then for Supervisor ID values.

This option is available only if you have enabled the Manage Positions business process on the Installation Table - HRMS Options page.

- *By Part Posn Mgmt Dept Mgr ID:* Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use partial position management. The system searches for reporting relationship based on Report To values first, and then for Department Manager ID values.
- *By Group ID:* Determines data access using the group ID set up in the Group Build feature.

If you select this option, you must select a valid group ID in the field that the system displays to the right. You define group IDs using the Group Build - Group Definition component.

These hierarchies relate to direct reports functionality and are the same as those found in the Access Type field on the Target Information page of the Direct Reports Setup component.

If you select the Specific Hierarchies check box and the All Persons check box, then this hierarchical selection of proxy becomes a preference rather than a requirement because the delegator has the option to either select from the list or search for any active proxy in the system.

Configuring Delegation Transactions

This section provides an overview of delivered delegation transactions and discusses how to configure delegation transactions.

Understanding Delivered Delegation Transactions

The PeopleSoft application delivers many transactions that are preconfigured for the Delegation framework and accessible through the Configure Transaction component. This table lists the delivered delegation transactions and their configuration:

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
EP_APPRAISAL	Delegate_PerformancDoc_Approve	EP_APPRAISAL_APPR	Delegate the approval of performance documents.
GP_ABS_EESS_BAL	Delegate Employee Absence Bal	GP_ABS_EESS_BAL	Delegate the initiation of employee absence balance inquiries.
GP_ABS_EESS_HIST	Delegate Employee Absence Hist	GP_ABS_EESS_HIST	Delegate the initiation of employee absence history inquiries.
GP_ABS_EESS_REQ	Delegate Employee Absence Rqst	GP_ABS_EESS_REQ	Delegate the initiation of employee absence requests.
GP_ABS_MGRSS_BAL	Delegate Manager Absence Bal	GP_ABS_MGRSS_BAL	Delegate the initiation of manager absence balance inquiries.
GP_ABS_MGRSS_HIST	Delegate Manager Absence Hist	GP_ABS_MGRSS_HIST	Delegate the initiation of manager absence history inquiries.
GP_ABS_MGRSS_REQ	Delegate Manager Absence Rqst	GP_ABS_MGRSS_REQ	Delegate the initiation of manager absence requests.
GP_SS_ABS_APPR_L	Delegate Manager Absence Appr	GP_SS_ABS_APPR_L	Delegate the approval of absence requests.

Transaction Name	Unique Role / Permission List	Component Name	Delegation Transaction Description
HR_EE_INF_MGR	Delegate_View_Employee_Info	HR_EE_INF_MGR	Delegate the initiation of employee information inquiries.
HR_FULL_PART_CHG	Delegate_FullPartStat_Initiate	HR_MGR_FULL_PART	Delegate the initiation of changes in full-time and part-time status.
HR_LOCATION_CHG	Delegate_LocChange_Initiate	HR_MGR_LOCATION	Delegate the initiation of location changes.
HR_PROMOTION (Approve)	Delegate_Promotion_Approve	HR_PROMOTE_APPR	Delegate the approval of promotions.
HR_PROMOTION (Initiate)	Delegate_Promotion_Initiate	HR_PROMOTE_MGR	Delegate the initiation of promotions.
HR_REPORT_CHG (Approve)	Delegate_ReportingChg_Approve	HR_MGR_REPORT_APPR	Delegate the approval of reporting changes.
HR_REPORT_CHG (Initiate)	Delegate_ReportingChg_Initiate	HR_MGR_REPORT_CHNG	Delegate the initiation of reporting changes.
HR_RETIRE	Delegate_Retire_Initiate	HR_RETIRE_EE	Delegate the initiation of employee retirements.
HR_TERM	Delegate_Terminate_Initiate	HR_EE_TERMINATE	Delegate the initiation of employee terminations.
HR_TRANSFER (Approve)	Delegate_Transfer_Approve	HR_TRANSFER_APPR	Delegate the approval of transfers.
HR_TRANSFER (Initiate)	Delegate_Transfer_Initiate	HR_TRANSFER_MGR	Delegate the initiation of transfers.
JobOffer	Delegate_JobOffer_Approve	HRS_RECRUIT_CONSOL	Delegate the approval of job offers.
JobOpening	Delegate_JobOpening_Approve	HRS_RECRUIT_CONSOL	Delegate the approval of job openings.
TL_MSS_EE_SECH_PRD (Approve)	Delegate Manage AppRpt Time	TL_MSS_EE_SRCH_PRD	Delegate the approval of managing reported time.
TL_MSS_EE_SECH_PRD (Initiate)	Delegate Manage Report Time	TL_MSS_EE_SRCH_PRD	Delegate the initiation of managing reported time.
TL_SRCH_APPRV_GRP	Delegate Manage App Pay Time	TL_SRCH_APPRV_GRP	Delegate the approval of payable time.

<i>Transaction Name</i>	<i>Unique Role / Permission List</i>	<i>Component Name</i>	<i>Delegation Transaction Description</i>
WCSCompConfirmer	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of confirming compensation proposals.
WCSCompReviewer	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of reviewing compensation proposals.
WCSCompSubmitter	Delegate Update Compensation	WCS_ECM_MSS_HOME	Delegate the initiation of submitting compensation proposals.
WCS_ECM_AWE_HOME	Delegate Approve Compensation	WCS_ECM_AWE_HOME	Delegate the approval of compensation.

Note. For more information about application-specific delegation transactions, refer to the application-specific PeopleBook.

Page Used To Configure Delegation Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Configure Delegation Transaction	HCDL_TXN_SETUP	- Set Up HRMS, Common Definitions, Delegation, Delegation Setup Center, Configure Transactions, Configure Delegation Transaction - Set Up HRMS, Common Definitions, Delegation, Configure Transactions, Configure Delegation Transaction	Configure transactions for delegation. This task is performed by delegation administrators after setting up delegation installation settings so that the transaction becomes available for delegation configuration.

Configuring Delegation Transactions

Access the Configure Delegation Transaction page (Set Up HRMS, Common Definitions, Delegation, Delegation Setup Center, Configure Transactions, Configure Delegation Transaction).

Configure Delegation Transaction

Transaction Name: Manager Absence Approve

Transaction Type: Approve

*Description: Manager Absence Approve

Configure Delegation Transaction

Find | View All First 1 of 1 Last

*Effective Date: 01/01/2005  *Status: Active   

Security

*Role: Delegate Manager Absence Appr 

*Component Name: GP_SS_ABS_APPR_L 

Optional Parameters

Display Link Label

Message Set Number:

Message Number:

Delegation Event Handler Class

Root Package ID: 

Path: 

Configure Delegation Transaction page

Transaction Name Displays the name of the transaction. If you are adding a new value, the system prompts you to select a value from the list of transactions that have been configured for workflow *and* selected for delegation initiation or approval on the Workflow Transactions page. Transactions that do not meet these criteria are not available for delegation configuration.

Transaction Type Displays whether the configuration of the transaction is for delegation initiation or approval. The Delegation framework allows you to separate the task of initiating a transaction from approving the same transaction on someone's behalf. If you are adding a new value, the system prompts you to select either:

- *Initiate*: Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf.
- *Approve*: Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.

Although both options are available for the selected transaction, the value that you select is valid only if you have selected the corresponding Delegate Initiation or Delegate Approvals check box on the Workflow Transactions page.

Description Enter the description of the delegation transaction configuration. The system uses this description throughout the delegation pages when displaying related transactions. As a default, the system uses the concatenation of the transaction type and transaction name. We strongly recommend that you always assign a meaningful description.

Effective Date and Status Enter the effective date of the transaction and whether it is active or inactive within the Delegation framework. By entering new effective-dated rows, you can enable or disable the transaction, as necessary. When entering a new row, the system uses the system date for the effective date by default.

Security

Use this group box to establish security access for proxies that are delegated authority to the given transaction. While a delegation transaction is active, the Delegation framework temporarily assigns the specified role to the proxy and grants the proxy access to the specified component.

Role Select the role that contains the permission list for the relevant component where one processes the given transaction. Each transaction that you enable for delegation must have a unique role and associated permission list that are solely for delegation purposes.

When a proxy's delegated authority becomes active, the system temporarily assigns this role to the proxy's user profile so that the proxy can access the transaction component while having delegation authority. When the proxy's delegation authority ends, the system deletes this role from the proxy's user profile. Thus, the proxy no longer has access to the transaction component.

If an approval transaction requires that the approver be in a particular role, then the proxy who is delegated authority over that transaction must have the same role to approve the transaction. For example, if promotion approval requires that the approver be a manager, then the proxy who is delegated authority to approve promotions must also be a manager to successfully approve a promotion request.

This field prompts from roles set up in the Roles component.

Warning! You must use a unique role for each component that you associate with a delegated transaction.

See [Chapter 28, "Setting Up and Working with Delegation," Understanding Permission Lists and Roles for Delegation, page 716.](#)

Component Name Select the object name of the component where users can process requests for the given transaction. When a user creates a delegation request, the system checks the delegator's user profile to determine if the delegator has the authority to access this component. The system permits the creation of a delegation request for the transaction only if the delegator has security access.

Optional Parameters

Use this group box when you need to create a link on the Delegation pages that will take the user to a product specific page to complete the delegation process.

Use the Display Link Label fields for retrieving the link labels from the message catalog.

Message Set Number and Message Number Enter the number that will identify the label that should be used for the link that will appear on the Delegation Detail page. This label is maintained at the product specific

Note. For more information about application-specific message numbers, refer to the application-specific PeopleBook.

Use Delegation Event Handler Class fields to identify the product specific application classes.

Root Package ID Select the application package that owns the component to which the person will be directed when he or she clicks the link in the Delegation pages.

Path Enter the class that will take the user to the product specific component to finished the delegation process.

Adding Delegation Requests by Administrator

This section discusses how to add delegation requests by administrator.

Page Used to Add Delegation Requests by Administrator

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Add Delegation Request	HCDL_ADMIN_ADD_DLG	Workforce Administration, Self Service Transactions, Approvals and Delegation, Add Delegation Request, Add Delegation Request	Add delegation requests that administrators create on behalf of delegators.

Adding Delegation Requests by Administrator

Access the Add Delegation Request page (Workforce Administration, Self-Service Transactions, Approvals and Delegation, Add Delegation Request, Add Delegation Request).

Add Delegation Request

Antonio Smith

Employee

Emplid: K0W001

Empl Record: 0

From Date	To Date	Trans Type	Transaction Name	Proxy	Name	Notify Delegator		
12/21/2009	01/01/2010	Approve	GP_SS_ABS_APPR_L	K0W006	Paul Harvest	☒	+	-

Maintain Delegated Authorities

Administer Delegation

Add Delegation Request page

Note. To prevent situations of cascading or circular delegation chains, after the Delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The Delegation framework only passes authority over transactions from initial delegator to initial proxy.

Note. When a user adds a delegation request, the system checks for an Alternate User ID field value on the User Profile - Workflow page. The delegation request overrides the alternate user ID for transactions in the delegation request. If an alternate user ID exists and the dates of the delegation and alternate ID overlap, the system issues a warning message.

- From Date and To Date

Enter the date range for which you want the delegation to be active. The From Date value must be greater than today's date. The To Date value must be greater than the From Date value. If you want to make the delegation open-ended, leave the To Date field blank.
- Trans Type (transaction type) and Transaction Name

Select the transaction that is being delegated. The system prompts you to select from only the transactions for which the delegator has access. The transactions must be active for the specified date range of the delegation, as defined on the Configure Delegation Transaction page.

The system displays whether the selected transaction is for delegation initiation or approval.
- Proxy and Name

Select the proxy to whom the delegator wants to delegate the transaction.
- Notify Delegator

Select this check box to have the system send a courtesy email notification to the delegator when the proxy approves or initiates this transaction on the delegator's behalf.
- Maintain Delegated Authorities

Click this link to access the Maintain Delegated Authority page, where you can run a batch job to process delegation transactions.
- Administer Delegation

Click this link to access the Administer Delegation page, where you can search for and manage individual delegation requests in the system.

Product specific link

Select the product specific link for a transaction to have the system open the product specific component to complete the delegation request.

The product specific component will have a check box to indicate that it is OK to submit the delegation request or not. If it is OK, then the delegation request will be submitted. If it is not OK, then the delegation request will not be submitted.

This link is available when the Optional Parameters section of the Configure Delegation Transaction page for the transaction is configured to have further product specific delegation requirements. The label of the link comes from message catalog as specified on Configure Delegation Transaction page. When no information is entered in the Optional Parameters section of the Configure Delegation Transaction page, the link is not available.

Administering Delegations

This section discusses how to administer delegations.

Pages Used to Administer Delegations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Administer Delegation	HCDL_ADMIN_DLG	Workforce Administration, Self Service Transactions, Approvals and Delegation, Administer Delegation, Administer Delegation	Administer delegation requests. Administrators can review delegation requests and, if necessary, revoke them on behalf of delegators.
Administer Delegation - Request Details	HCDL_ADMIN_RQT_DTL	Click the link for a delegation request in the Request Status column on the Administer Delegation page: Request Details tab.	Delegation administrators can review details of a selected delegation request.

Administering Delegations

Access the Administer Delegation page (Workforce Administration, Self-Service Transactions, Approvals and Delegation, Administer Delegation, Administer Delegation).

Administer Delegation

[Maintain Delegated Authorities](#)
[Add Delegation Request](#)

Selection Criteria

Delegator:

Proxy:

Transaction Name:

From Date: 02/06/2009

To Date:

Request Status:

Delegation Status: Active

Search

Clear

Search Results

Delegation Request
Request Details

Description	Delegator	Name	Proxy	Name
☐ Approve Job Offer	N30002	Michael Campbell	E30051	Thomas Amari
☐ Approve Job Offer	N30016	James Casey	E30048	Isaac Devin
☐ Approve Job Opening	N30002	Michael Campbell	E30051	Thomas Amari
☐ Approve Job Opening	N30018	Tyler Cameron	E30050	Jayden Kasey
☐ Approve Job Offer	N30018	Tyler Cameron	E30050	Jayden Kasey

Select All
Deselect All
Revoke

Administer Delegation page: Delegation Request tab

Search Results				
Delegation Request Request Details				
From Date	To Date	Request Status	Delegation Status	Notify Delegator
☐ 02/06/2009	02/13/2009	Accepted	Active	☐
☐ 02/06/2009	02/06/2013	Accepted	Active	☐
☐ 02/06/2009	02/07/2013	Accepted	Active	☐
☐ 02/06/2009	02/13/2013	Accepted	Active	☐
☐ 02/06/2009	02/07/2018	Accepted	Active	☐

Administer Delegation page: Request Details tab

Note. If the delegator and proxy initiate duplicate transactions, then either the proxy, delegator, or delegation administrator can cancel the duplicate transaction or approvers can deny the duplicate transaction while approving the original transaction.

Maintain Delegated Authorities

Click this link to access the Maintain Delegated Authority page, where you can run a batch job to process delegation transactions.

Add Delegation Request

Click this link to access the Add Delegation Request page, where you can create delegation requests on behalf on delegators.

Selection Criteria

Use this group box to specify criteria for the delegation requests that you want to retrieve. To retrieve all delegation requests, click the Search button without specifying criteria. To narrow your search results, enter one or more criteria.

Delegator	Enter the delegator for whom you want to retrieve delegation requests. The system prompts you to select from delegators with existing requests.
Proxy	Enter the proxy for whom you want to retrieve delegation requests. The system prompts you to select from proxies with existing requests.
Transaction Name	Enter the transaction for which you want to retrieve delegation requests. The system prompts you to select from transactions that are part of existing requests.
From Date and To Date	Specify the specific from or to date for which you want to review delegation requests.
Request Status	Select the status of the requests that you want to retrieve. Request statuses are <i>Accepted</i> , <i>Ended</i> , <i>Rejected</i> , <i>Revoked</i> , and <i>Submitted</i> . See Chapter 28, "Setting Up and Working with Delegation," Understanding Delegation, page 707.
Delegation Status	Select the delegation status of the requests that you want to retrieve, either <i>Active</i> or <i>Inactive</i> . See Chapter 28, "Setting Up and Working with Delegation," Understanding Delegation, page 707.
Search	Click this button to retrieve delegation requests based on your selection criteria.
Clear	Click this button to deselect all selection criteria fields.

Search Results

The system displays delegation requests and details based on your search criteria.

Request Status	The system displays the status of the request on the Request Details tab: <i>Accepted</i> , <i>Ended</i> , <i>Rejected</i> , <i>Revoked</i> , and <i>Submitted</i> . Click this link to review further details of a delegation request. The system displays the Administer Delegation - Request Details page.
Select All	Click this button to select the check boxes for all delegation requests in the search results.
Deselect All	Click this button to deselect all check boxes for the selected delegation requests in the search results.

Revoke

Click this button to revoke a delegation request on behalf of the delegator. The system revokes delegations for all requests that are selected in the search results. The system sends a notification to the proxy who is affected by the change and automatically reassigns all pending transactions back to the delegator.

Processing Batch Delegation Requests

This section discusses how to process batch delegation requests.

Page Used to Process Batch Delegation Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Maintain Delegated Authority	HCDL_BATCH	Workforce Administration, Self Service Transactions, Approvals and Delegation, Maintain Delegated Authorities, Maintain Delegated Authority	Process batch delegation requests in a daily batch.

Processing Batch Delegation Requests

Access the Maintain Delegated Authority page (Workforce Administration, Self-Service Transactions, Approvals and Delegation, Maintain Delegated Authorities, Maintain Delegated Authority).

Maintain Delegation Authority

User ID: PS

[Report List](#)
[Process Monitor](#)

Run Control ID: PS

As Of Date: 04/29/2009

Maintain Delegated Authority page

Click the Process Request button to run the Maintain Delegated Authority (HCDL_BATCH) Application Engine process. This batch program processes all delegation transactions as of the system date that appears on the run control page. The process activates all delegation transactions that were future-dated to become active on today's date, revokes all delegation requests that have expired as of today's date, and searches for inactive proxies. For all affected delegation transactions, the process updates the request status and delegation status as appropriate. The process also updates proxy navigation security, as needed.

Important! Run this process daily to maintain delegations and update invalid rows.

Working with Self-Service Delegation

This section discuss how to:

- View delegation activity.
- View help for delegation.
- Select the job for a delegation request.
- Select a proxy by reporting hierarchy.
- Select a proxy by name.
- Submit a delegation request.
- View confirmation of delegation request submission.
- Manage proxies for delegation.
- View delegation request details.
- Manage delegated authorities.
- View confirmation of delegation request acceptance.
- View confirmation of delegation request rejection.
- View details for multiple transactions.

Pages Used to Work with Self-Service Delegation

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage Delegation	HCDL_MGR_DLG_HOME	- Self Service, Manage Delegation, Manage Delegation - Click the Cancel button while creating a delegation request. - Click the View Details link or the Approve/Deny link for a delegation transaction in the Self Service, Review Transactions component. - Click the View Details link for a delegation transaction in the Manager Self Service, Review Transactions component.	View delegation activity associated with a user.
Manage Delegation - Learn More about Delegation	HCDL_DLG_INSTR	Click the Learn More about Delegation link on the Manage Delegation page.	View help for delegation. Users can view an instructive description of delegation functionality.
Create Delegation Request - Select Job Title	HCDL_JOB_SELECTION	Click the Create Delegation Request link or the Review My Proxies link on the Manage Delegation page when you hold multiple jobs.	Select the job for a delegation request. Users with multiple jobs can select the job for which they want to create the delegation request or review their proxies.
Create Delegation Request - Enter Dates	HCDL_ADD_DLG_DATES	Click the Create Delegation Request link on the Manage Delegation page.	Enter delegation dates by specifying the From Date and To Date, which defines the delegation authority period for a transaction. By not specifying a To Date, users specify an open-ended delegation.
Create Delegation Request - Select Transactions	HCDL_ADD_DLG_TXNS	Click the Next button on the Enter Dates page.	Select transactions for delegation. Users can select one or more transactions to delegate.

Page Name	Definition Name	Navigation	Usage
Create Delegation Request - Select Proxy by Hierarchy	HCDL_ADD_DLG_SRCH	Click the Next button on the Select Transactions page.	Select a proxy by reporting hierarchy. Users can select a proxy for the transactions being delegated based on their reporting hierarchy.
Create Delegation Request - Select Proxy by Name	HCDL_ADD_DLG_SRCH	- Click the Search by Name link on the Select Proxy by Hierarchy page. - Click the Search by Hierarchy link on the Select Proxy by Name page.	Select a proxy by name. Users can search for and select a proxy for the transactions being delegated based on name.
Create Delegation Request - Delegation Detail	HCDL_ADD_DLG_DTL	Click the Next button on the Select Proxy by Hierarchy page or the Select Proxy by Name page.	Submit a delegation request. Users can review the details of a delegation request and then submit the delegation request.
Confirmation, Accept Delegation Request, Reject Delegation Request	HCDL_DLG_CONFIRM	- Click the Submit button on the Delegation Detail page when adding a delegation request. - Click the Accept button or the Reject button on the My Delegated Authorities page.	View the confirmation of the delegation request submission, the acceptance of a delegation request, or the rejection of a delegation request.
My Proxies	HCDL_MGR_DLGT	- Click the Review My Proxies link on the Manage Delegation page. - Click the OK button on the Confirmation page after successfully completing a delegation request.	Manage proxies for delegation. Users can manage their proxies by search for and updating the status of their delegation requests.
Delegation Request Details	HCDL_REQUEST_DTL	Click the Details button for the delegation transaction on the My Proxies page.	Viewing delegation Request Details. Users can review the details of a submitted delegation request.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My Delegated Authorities	HCDL_MGR_DLGT	Click the Review My Delegated Authorities link on the Manage Delegation page.	Manage delegated authorities. Users can accept or reject the delegation requests for which they have been selected to serve as proxy. Note. In some cases, there may be manager self-service pages that you do not typically have permission to access. In these cases, after accepting a delegation request, log off the system and back in to access the manager self-service pages.
Multiple Transactions	HCDL_MULTI_TXNS	Click the Multiple Transactions link on the My Delegated Authorities page.	Users can view details of the multiple transactions for which they have delegated authority.

Viewing Delegation Activity

Access the Manage Delegation page (Self Service, Manage Delegation, Manage Delegation).

Manage Delegation

Jean Parsons

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

 [Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

Select *Review My Delegated Authorities* to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

[Review My Delegated Authorities](#)

Manage Delegation page

Users can view all delegation activity associated with themselves. They can create a delegation request, revoke delegation requests for which they have delegated transaction initiation or approval to a proxy, and accept or reject the delegation requests for which they are selected to serve as proxy. The system displays only the content and associated links that are applicable to the user at the time that user accesses the page. Specifically, the system displays:

- The *Learn More about Delegation* link and associated content for learning more about delegation, which is accessible to all users at all times provided that the system is using the Delegation framework.
- The *Create Delegation Request* link and associated content for creating delegation requests only if the user has navigation security access to transactions that are enabled for delegation through the delegation setup pages.
- The *Review My Proxies* link and associated content for reviewing proxies only if the user has active or inactive delegation requests.
- The *Review My Delegated Authorities* link and associated content for reviewing delegated authorities only if the user has been delegated authority to serve as a proxy.

Viewing Help For Delegation

Access the Manage Delegation - Learn More about Delegation page (click the Learn More about Delegation link on the Manage Delegation page).

Manage Delegation

Return

Jean Parsons

What is Delegation?

Depending upon how your System Administrator has setup your system, you may be able to delegate some or all of your Employee and/or Manager Self Service transactions to one or more people. When delegating transactions, you can specify whether you're delegating the authority to initiate a transaction, or approve a transaction.

For example, you may choose to delegate some or all of your transactions for the following reasons:

- You know that you will be away from the office for an extended period of time, and thus will not be able to manage transactions for you or your employees. You can delegate your transactions to someone else for a specific period of time.
- You prefer to have an assistant process all of your transactions. You can delegate all of your transactions to someone else for an indefinite period of time.

There are three links on Delegation Home Page - one for each way of managing delegation:

- **Create Delegation Request** - To create a delegation request so that your transaction(s) can be taken care of by a proxy.
- **Review My Proxies** - To view a list of transactions that you have delegated to proxies and to revoke the delegated authority of proxies.
- **Review My Delegated Authorities** - To view a list of transactions that have been delegated to you. You can either accept the request or reject the request.

FAQ

Who can I delegate transactions to?
Just about anyone. The other person does not have to be a manager, and they don't have to report to you.

Manage Delegation - Learn More about Delegation page

You can configure this page by accessing it through PeopleTools Application Designer.

Selecting the Job for a Delegation Request

Access the Create Delegation Request - Select Job Title page (click the Create Delegation Request link or the Review My Proxies link on the Manage Delegation page when you have multiple jobs).

Create Delegation Request

Select Job Title

Antonio Santos

Please select the job title below for which you wish to review or create delegation requests.

Job Information			
Job Title	Department	Supervisor Name	Company
☒ Assistant-Administrative	Human Resources	Tina Palisco	Global Business Institute 9999
☐ Consultant-Junior	Customer Service	Marc Kessler	Global Business Institute 9999

Continue Cancel

Select Job Title page

If users creating the delegation request or reviewing their proxies have multiple jobs, the system prompts the user to select the job for which they want to create the delegation request or review proxies. This page displays only when the employee has multiple jobs.

Entering Delegation Dates

Access the Create Delegation Request - Enter Dates page (click the Create Delegation Request link on the Manage Delegation page).

Create Delegation Request

Enter Dates

Jean Parsons

Senior Vice President Finance

Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates	
From Date:	06/29/2009 
To Date:	07/10/2009 

Next Cancel

Create Delegation Request - Enter Dates page

Creating a Delegation Request

Access the Create Delegation Request - Select Transactions page (click the Next button on the Enter Dates page).

Select Transactions

Jean Parsons

Senior Vice President Finance

Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Delegate Transactions	
Transaction	
☐ Employee Absence Balance	
☐ Employee Absence History	
☐ Employee Absence Request	
☐ Initiate Promotion	
☐ Initiate Terminate Employee	
☐ Initiate Transfer	
☒ Manage Approve Payable Time	
☒ Manage Approve Reported Time	
☒ Manage Reported Time	
☒ Manager Absence Approve	
☒ Manager Absence Balance	
☒ Manager Absence History	
☒ Manager Absence Request	
☐ Review Compensation Proposals	
☐ Submit Compensation Proposals	

[Select All](#) [Deselect All](#)

[Previous Item](#) [Next](#) [Cancel](#)

Create Delegation Request - Select Transactions page

The system displays only the transactions that are configured for delegation initiation or approval on the Configure Delegation Transactions page and for which the delegator has component access.

Users can delegate one or multiple transactions to another person in a single delegation request. When a proxy receives a delegation request for multiple transactions, he or she must accept or reject the entire request. The delegator, however, can revoke single transactions from a multiple transaction request. When a delegator revokes one or more transactions from a multiple transaction request, the system pulls the revoked transactions out of the multiple transaction request and creates individual revoked entries in the Approval Framework. The remaining transactions stay in the multiple transaction request. If only one transaction remains after revoking, the system disbands the group and displays an individual rather than multiple delegation request. This functionality preserves the accuracy of the multiple transaction status.

Selecting a Proxy by Reporting Hierarchy

Access the Create Delegation Request - Select Proxy by Hierarchy page (click the Next button on the Select Transactions page).

Create Delegation Request

Select Proxy by Hierarchy

Jean Parsons

Senior Vice President Finance

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the [Search by Name](#) hyperlink to search for proxies outside your hierarchy.

[Search by Name](#)

Choose Delegate					
Name	EmpID	Org Relation	Job Title	Department	Supervisor Name
☒ Betty Locherty	KU0007	Employee	Director-Finance	Corporate Finance	Jean Parsons
☐ Calvin Roth	KU0008	Employee	Director-Information Systems	Information Systems	Jean Parsons
☐ Douglas Lewis	KU0001	Employee	President & CEO	President	
☐ Kathy Wise	KU0206	Employee	Vice President-Admin	Administration	Jean Parsons
☐ May Gee	KU0025	Employee	Assistant-Administrative	Administration	Jean Parsons
☐ Patrick Seto	KU0011	Employee	Vice President-Corp Legal	Corporate Legal	Jean Parsons
☐ Tom Newman	K0MTX001	Employee	Director-Finance	Financial Services	Jean Parsons

Create Delegation Request - Select Proxy by Hierarchy page

Users can select a proxy for transactions they are delegating. If the delegation administrator selects a specific hierarchy for the transaction on the Delegation Installation Settings page, the system displays valid proxies based on that selection, and users can select from this list. Valid proxies include persons who report directly or indirectly to the delegator, as well as all persons in the upward hierarchy—starting with the delegator's manager. If the delegation administrator selects the All Persons check box on the installation page, then the system displays the Search by Name link so that users can search for and select from any person in the system.

Selecting a Proxy by Name

Access the Create Delegation Request - Select Proxy By Name page (click the Search by Name link on the Select Proxy by Hierarchy page).

Create Delegation Request

Select Proxy by Name

Jean Parsons

Senior Vice President Finance

Search for a proxy using their name. You can also select the [Search By Hierarchy](#) hyperlink to search for your proxy.

[Search by Hierarchy](#)

Last Name: 

First Name: 

Choose Delegate					
Name	EmplID	Org Relation	Job Title	Department	Supervisor Name
☐ Brevin Baron	KULO11	Employee	Manager-Compensation/Benefits	Benefits	Eduardo Campos
☐ Chris Baron	KULH11	Employee	Engineer-Quality Assurance	Quality Assurance	
☐ John Baron	KULA11	Employee	Consultant-Junior	Sales and Services	Kenneth Grafton
☐ Kim Baron	KULD11	Employee	Engineer-Quality Assurance	Quality Assurance	
☐ Macke Baron	FAPK0571	Person of Interest			
☐ Martina Baron	KCLA11	Employee	Secretary-Senior	Human Resources	Marcel Saint-Amand
☐ Patrick Baron	KULM11	Employee	Specialist-Employment	Human Resources	Reza Aliverdi
☐ Reggie Baron	KUL611	Employee	Analyst-Business	Business Services	

Create Delegation Request - Select Proxy by Name page

Users can search for a proxy by name and select from the list of valid values in the search results. This page is available only if the delegation administrator selects the All Persons check box on the Delegation Installation Settings page.

Submitting a Delegation Request

Access the Create Delegation Request - Delegation Detail page (click the Next button on the Select Proxy by Hierarchy page or the Select Proxy by Name page).

Create Delegation Request

Delegation Detail

Jean Parsons

Senior Vice President Finance

Groupbox

Select the *Notify Delegator* checkbox to receive all the notifications that your proxy receives when acting on your behalf.

Proxy: Betty Locherty

From Date: 06/29/2009

To Date: 07/10/2009

Transactions
Manage Approve Payable Time
Manage Approve Reported Time
Manage Reported Time
Manager Absence Approve
Manager Absence Balance
Manager Absence History
Manager Absence Request

☒ **Notify Delegator**

Create Delegation Request - Delegation Detail page

The system displays the delegation period, the selected proxy, and the selected transactions. When a transaction is set up with product specific delegation requirements on the Configure Delegation Transaction page, a link will appear after the transaction. When no information is entered in the Optional Parameters section of the Configure Delegation Transaction page, the link is not available. Select the product specific link for a transaction to have the system open the product specific component to continue the delegation request.

When users click the Submit button, the system automatically sends an email notification to the proxy to either accept or reject the delegation request if Approval Framework is set up.

To prevent situations of cascading or circular delegation chains, after the Delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The Delegation framework only passes authority over transactions from initial delegator to initial proxy.

Note. When a user adds a delegation request, the system checks for an Alternate User ID field value on the User Profile - Workflow page. The delegation request overrides the alternate user ID for transactions in the delegation request. If an alternate user ID exists and the dates of the delegation and alternate ID overlap, the system issues a warning message.

Viewing Confirmation of Delegation Request Submission

Access the Create Delegation Request - Confirmation page (click the Submit button on the Delegation Detail page).



Create Delegation Request - Confirmation page

Note. If the delegator and proxy initiate duplicate transactions, then either the proxy, delegator, or delegation administrator can cancel the duplicate transaction or approvers can deny the duplicate transaction while approving the original transaction.

Managing Proxies for Delegation

Access the My Proxies page (click the Review My Proxies link on the Manage Delegation page).

My Proxies

Jean Parsons

Senior Vice President Finance

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and select *Refresh* to show the matching requests. Select the information icon to view request details. To revoke requests, select the request, then select *Revoke*.

Show Requests by Status:

Choose Delegate							
Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
☐ Manager Absence Balance	Betty Locherty	Director-Finance	06/29/2009	07/10/2009	Submitted	Inactive	
☐ Manager Absence History	Betty Locherty	Director-Finance	06/29/2009	07/10/2009	Submitted	Inactive	
☐ Manager Absence Request	Betty Locherty	Director-Finance	06/29/2009	07/10/2009	Submitted	Inactive	
☐ Manager Absence Approve	Betty Locherty	Director-Finance	06/29/2009	07/10/2009	Submitted	Inactive	
☐ Manage Approve Reported Time	Betty Locherty	Director-Finance	06/29/2009	07/10/2009	Submitted	Inactive	
☐ Manage Reported Time	Betty Locherty	Director-Finance	06/29/2009	07/10/2009	Submitted	Inactive	
☐ Manage Approve Payable Time	Betty Locherty	Director-Finance	06/29/2009	07/10/2009	Submitted	Inactive	

[Select All](#) [Deselect All](#)

[Return to Manage Delegation](#)

My Proxies page

Users can change their mind by revoking delegation requests for which they have delegated transaction initiation or approval to a proxy. To revoke the delegation request, users must select the check box for the delegation request and then click the *Revoke* button. The system changes the request status to *Revoked* and automatically sends an email notification to the proxy about the status of the delegation request.

Viewing Delegation Request Details

Access the Delegation Request Details page (click the Details button for the delegation transaction on the My Proxies page).

Delegation Request Details

Jean Parsons

Senior Vice President Finance

Request Details	
Transaction:	Manager Absence Balance
Proxy:	Betty Locherty
On Behalf Of:	Jean Parsons
Job Title:	Senior Vice President Finance
From:	06/29/2009
To:	07/10/2009
Notify Delegator of All Transactions for Proxy:	Yes

Request Status	
Request Status:	Submitted
Delegation Status:	Inactive

Request History					
Customize Find First 1-7 of 7 Last					
	Transaction Name	Transaction Type	Request Status	Name	DateTime Stamp
1	TL_SRCH_APPRV_GRP	Approve	Submitted	Jean Parsons	04/29/09 2:29PM
2	TL_MSS_EE_SRCH_PRD	Initiate	Submitted	Jean Parsons	04/29/09 2:29PM
3	TL_MSS_EE_SRCH_PRD	Approve	Submitted	Jean Parsons	04/29/09 2:29PM
4	GP_SS_ABS_APPR_L	Approve	Submitted	Jean Parsons	04/29/09 2:29PM
5	GP_ABS_MGRSS_REQ	Initiate	Submitted	Jean Parsons	04/29/09 2:29PM
6	GP_ABS_MGRSS_HIST	Initiate	Submitted	Jean Parsons	04/29/09 2:29PM
7	GP_ABS_MGRSS_BAL	Initiate	Submitted	Jean Parsons	04/29/09 2:29PM

[Return to My Proxies](#)

Delegation Request Details page

Users can click the Return button to return to the My Proxies page.

Managing Delegated Authorities

Access the My Delegated Authorities page (click the Submit button on the Delegation Detail page when adding a delegation request).

My Delegated Authorities

Jean Parsons

Senior Vice President Finance

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status: Submitted Refresh

Choose Delegate							
Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
☐ Multiple Transactions	Betty Locherty	Director-Finance	04/29/2009	04/30/2009	Submitted	Inactive	i

[Select All](#)
[Deselect All](#)
Accept
Reject

[Return to Manage Delegation](#)

My Delegated Authorities page

A proxy can hold more than one delegated authority from different delegators. The proxy must select the check box for delegation request and then click either the Accept button or the Reject button. The system automatically sends an email notification to the delegator about the status of the delegation request.

Note. When you are delegating to a proxy who has multiple job records (as defined in the Job Data component), the system uses the proxy's job record number 0 by default.

Multiple Transactions

Delegators can delegate one or multiple transactions to another person in a single delegation request on the Create Delegation Request - Select Transactions page. If the delegation request contains multiple transactions, the proxy can click the Multiple Transactions link to access the Multiple Transactions page and view details about each transaction in the delegation request. For a delegation request with multiple transactions, the proxy must accept or reject the entire request.

The delegator can revoke single transactions from a multiple transaction request on the My Proxies page. When a delegator revokes one or more transactions from a multiple transaction request, the system pulls the revoked transactions out of the multiple transaction request and creates individual revoked entries in the Approval Framework. The remaining transactions stay in the multiple transaction request. If only one transaction remains after revoking, the system disbands the group and displays the delegation request as an individual transaction rather than a multiple transaction. This functionality preserves the accuracy of the multiple transaction status.

Viewing Confirmation of Delegation Request Acceptance

Access the Accept Delegation Request page (click the Accept button on the My Delegated Authorities page).



Accept Delegation Request

Jean Parsons

Senior Vice President Finance

You have successfully accepted a delegation request. Refer to the [My Delegated Authorities](#) page to view accepted delegation requests.

OK

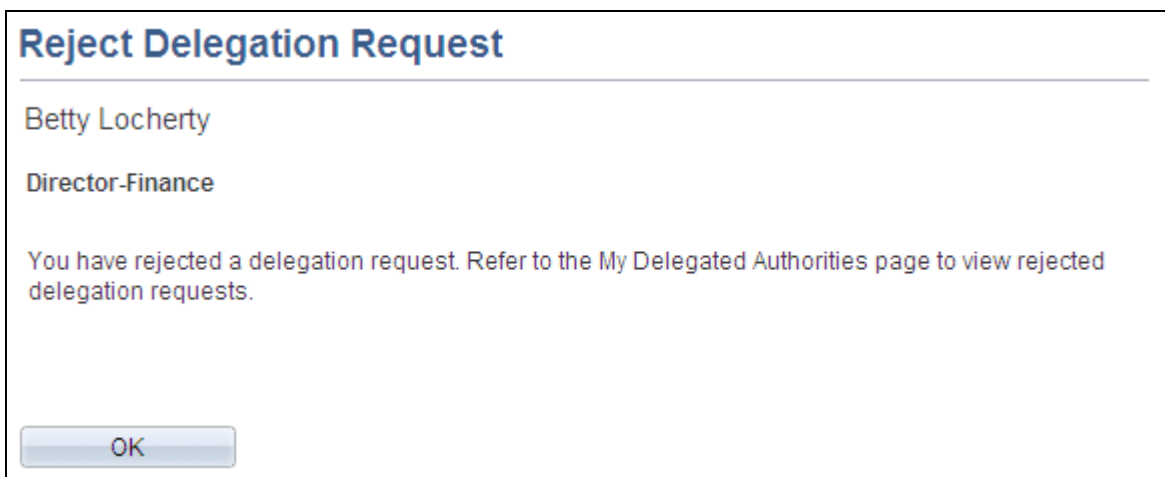
Accept Delegation Request page

Users can click the OK button to return to the My Delegated Authorities page.

Note. In some cases, there may be manager self-service pages that you do not typically have permission to access. In these cases, after accepting a delegation request, log off the system and back in to access the manager self-service pages.

Viewing Confirmation of Delegation Request Rejection

Access the Reject Delegation Request page (click the Reject button on the My Delegated Authorities page).



Reject Delegation Request

Betty Locherty

Director-Finance

You have rejected a delegation request. Refer to the [My Delegated Authorities](#) page to view rejected delegation requests.

OK

Reject Delegation Request page

Users can click the OK button to return to the My Delegated Authorities page.

Viewing Details for Multiple Transactions

Access the Multiple Transactions page (click the Multiple Transactions link on the My Delegated Authorities page).

Multiple Transactions					
Transaction	Name	From Date	To Date	Request Status	Delegation Status
Manage Approve Payable Time	Jean Parsons	06/29/2009	07/10/2009	Rejected	Inactive
Manage Reported Time	Jean Parsons	06/29/2009	07/10/2009	Rejected	Inactive
Manage Approve Reported Time	Jean Parsons	06/29/2009	07/10/2009	Rejected	Inactive
Manager Absence Approve	Jean Parsons	06/29/2009	07/10/2009	Rejected	Inactive
Manager Absence Request	Jean Parsons	06/29/2009	07/10/2009	Rejected	Inactive
Manager Absence History	Jean Parsons	06/29/2009	07/10/2009	Rejected	Inactive
Manager Absence Balance	Jean Parsons	06/29/2009	07/10/2009	Rejected	Inactive

[Return](#)

Multiple Transactions page

The system provides access to this page only if the delegator selected the user to server as proxy for multiple transactions within the same delegation request.

Reviewing Delivered Notification Templates for Delegation

This table lists the delivered delegation notifications, describes each notification, describes the trigger for each notification, and lists the recipients:

Template Name	Notification Description	Trigger	Recipients
DelegationAccept	States that the proxy has accepted the delegation request submitted by the delegator.	Proxy accepts delegation request.	To: Delegator CC: Proxy
DelegationAdminAdd	States that the administrator, on behalf of delegator, has submitted a delegation request to the proxy.	Delegation administrator adds and submits delegation request.	To: Proxy CC: Delegator

Template Name	Notification Description	Trigger	Recipients
DelegationAdminRevoke	States that the administrator, on behalf of delegator, has revoked a delegation request that was assigned to the proxy.	Delegation administrator revokes delegation request.	To: Proxy CC: Delegator
DelegationBatch	States that delegation authority has been made active or inactive for the delegator and transactions listed. Also states that security has been updated to allow the proxy access to the transactions.	Delegation administrator runs the Maintain Delegated Authorities batch process.	To: Proxy CC: Delegator
DelegationError	States that a submitted delegation request has encountered an error.	Delegator submits a delegation request but an error occurs.	To: Delegator
DelegationNotifyAdmin	States that the system has identified that a proxy is inactive for at least one day for a delegation request that has been accepted.	Delegation administrator runs the Maintain Delegated Authorities batch process.	To: Delegator CC: Delegation Administrator
DelegationReject	States that a proxy has rejected a delegation request submitted by a delegator.	Proxy rejects delegation request.	To: Delegator CC: Proxy
DelegationRequest	States that a delegator or an administrator on behalf of the delegator has submitted a delegation request to the proxy.	Delegator creates and submits a delegation request.	To: Proxy CC: Delegator
DelegationRevoke	States that a delegator or an administrator on behalf of the delegator has revoked a delegation request that was assigned to the proxy.	Delegator revokes a delegation request.	To: Proxy CC: Delegator

See Also

Chapter 27, "Setting Up and Working with Approvals," Defining Notification Templates for Approvals, page 686

Chapter 29

Working with Metadata and Query Builder

This chapter discusses how to:

- Manage the HCM metadata repository.
- Use Query Builder.

Managing the HCM Metadata Repository

To manage the HCM metadata repository, use the Base Class Definition (HCMD_BASE_CATALOG), Object Class Definition (HCMD_OBJ_CATALOG), Export (HCMD_EXPORT_OBJS), and Import (HCMD_IMPORT_OBJS) components.

This section provides an overview of the HCM metadata repository and discusses how to:

- Define base classes.
- Define object classes.
- Enter class attribute details.
- Enter class relationship details.
- Export metadata.
- Import metadata.

Understanding the HCM Metadata Repository

Metadata is data about the data in your system. It defines every object, object attribute, and relationship between objects. Metadata enables you to define and manipulate the records in your PeopleSoft HRMS database as objects.

The HCM metadata object model consists of the following two elements:

- PeopleTools-level metadata

Provides information about fields, field labels, and database records and views.

- HCM-level metadata

Establishes relationships between objects at the object level, defines objects's services, and alternative labels.

HCM metadata object definitions are registered in the metadata repository as classes and these classes are grouped in the following two catalogs according to general behavior, processing, and attribute needs:

- Base catalog.

Object classes:

- Define the general behavior and attributes for a class.
- Group objects for better processing and querying.
- Provide a single layer of inheritance for derived classes.

- Object catalog.

Object classes:

- Can be the child object of a parent base class, inheriting all of the attributes of the base class.

Note. Object class catalogs do not need to have a parent class object.

Note. Any metadata class definitions that are not obviously a parent class object, should be defined in the object catalog.

- Are defined with unique attributes in addition to any inherited attributes.

For example, the base class object, Person Base, is the parent to the derived object class, Person.

Common Elements Used in this Section

Basic Information	Define the class's basic characteristics by entering information into the following fields: • Class Name • Display Label • Object Owner ID • Active Flag

Class Use

Define how the class object is used by:

- Selecting one of the following options:
 - *Production*: a standard production object.
 - *Staging*: a specialized staging object used to load data into the HCM system.
 - *Reporting*: a specialized reporting object.
 - *System*: an HCM system object not usually visible to users.
 - *Configuration*: a specialized object used in HCM system configuration.
 - *Source View* (object class only)
 - *Attribute Map* (object class only)
 - *Key Map* (object class only)
 - *Temporary* (object class only)
- Selecting Use in UI? to display the class in a dynamic user interface.
- Selecting Use in Queries? to display the class in Query Builder.

The system selects the System Data check box if the class object is delivered as HCM system data.

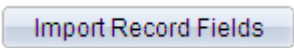
Persistence Mapping

Enter the name of the PeopleTools record to which this class maps. The PeopleTools record is the sole source for the class object. Each class definition maps to one PeopleTools record

Class Attributes (Record Field)

Review or enter the class attributes.

Click the View Attribute Details button to review details or enter a details for a new class attribute on the Class Attribute Details page.


 A rectangular button with a light blue gradient and a thin border. The text "Import Record Fields" is centered in a dark blue font.

Click to populate the Class Attributes grid with all the fields associated with the PeopleTools record you selected in the persistence mapping Record Name field.

The button does not overwrite valid fields.

Note. PeopleSoft recommends that you keep the attributes in sync with the PeopleTools record fields by using this button after you make a modification to the PeopleTools record.

Relationships

Define the relationships this class definition has with other class definitions. For example the Person class that maps to the PeopleTools Person record could be have relationships with the:

- Name class.
People in the system could have one or more names.
- Address class.
People in the system could have one or more address.
- Job class.
People in the system could have zero or more jobs.

Click the View Relationship Details button to review details or enter a details for a new class attribute on the Class Relationship Details page.

Class Extensions

Class extensions enable you to define any additional attributes that you can access through APIs (you cannot use these properties with Query Builder). For example, you could create a Java type class extension called MyJava and with a value of the Java file name that programmers can access as required.

Define the class extensions by entering values into the following fields:

- Type
- Name
- Value

Pages Used to Manage the HCM Metadata Repository

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Base Class Definition	HCMD_BASE_PG	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Base Class Definition, Base Class Definition	Define base classes by setting up and reviewing definitions for base classes.
Object Class Definition	HCMD_OBJS_PG	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Object Class Definition, Object Class Definition	Define object classes by setting up and reviewing definitions for derived classes.

Page Name	Definition Name	Navigation	Usage
Class Attribute Details	HCMD_OATT_SPG	- Click the View Attribute Details icon for a class attribute on the Base Class Definition page. - Click the View Attribute Details icon for a class attribute on the Object Class Definition page.	Enter or review class attribute details
Class Relationship Details	HCMD_OREL_SPG	- Click the View Relationship Details icon for a relationship on the Base Class Definition page. - Click the View Relationship Details icon for a relationship on the Object Class Definition page.	Enter or review class relationship details.
Export Metadata Definitions	HCMD_EXPORT_OBJS	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Export, Export Metadata Definitions	Export metadata definitions from the catalog to XML.
Export Metadata Definitions	HCMD_FILENAME	Click the Export All Class Definitions button on the Export Metadata Definitions page.	Enter the path and filename of the export file to be created.
Import Metadata Definitions	HCMD_IMPORT_OBJS	Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Import, Import Metadata Definitions	Import metadata definitions.

Defining Base Classes

Access the Base Class Definition page (Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Base Class Definition, Base Class Definition).

Base Class Definition

Class ID: PERSON_BASE

by: PS

Last Update Date/Time: 05/18/2004 9:25:32PM

Basic Information

*Class Name: PersonBase

*Description: Person Base Class

Display Label: Person

*Object Owner ID: HR Core Objects

*Active Flag: Active

Class Use

☐ Use in UI

☒ Use in Queries

☒ System Data

Object use

☒ Production

☐ Staging

☐ Reporting

☐ System

☐ Configuration

Persistence Mapping

*Record Name: HCMD_PERS_BASE

Record Description: Organization Person Base Obj.

Class Attributes (Record Field)

Active	*Attribute Name	Field Name	Description	Details	
☒	EMPLID	EMPLID	Employee ID		

Import Record Fields

Base Class Definition page (1 of 2)

Relationships

Active	*Relationship Name	*Relationship Type	*Target Class ID	Details		
☒		One-to-Many (Child)				+ -

Class Extensions

Type	Name	*Value		
			+ -	

Base Class Definition page (2 of 2)

Defining Object Classes

Access the Object Class Definition page (Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Object Class Definition, Object Class Definition).

Object Class Definition

Class ID: EMAIL

by: PS

Last Update Date/Time: 05/30/2004 9:21:18PM

Basic Information

*Class Name: EmailAddresses

*Description: Email Addresses

Display Label: Email Addresses

*Object Owner ID: HR Core Objects

*Active Flag: Active

Class Use

☐ Use in UI

☒ Use in Queries

☒ System Data

Object use

☒ Production

☐ Staging

☐ Reporting

☐ Source View

☐ Attribute Map

☐ Key Map

☐ System

☐ Temporary

☐ Configuration

Persistence Mapping

*Record Name: EMAIL_ADDRESSES

Record Description: Email Addresses

Class Attributes

Parent Class:

Search Component:

Component Interface Name:

Edit Component

Menu Name:

Menu Bar Name:

Item Name:

Page Name:

Object Class Definition page (1 of 2)

Class Attributes (Record Field)

Active	*Attribute Name	Field Name	Description	View Attribute Details	
☒	EMAIL_ADDR	EMAIL_ADDR	Email Address		-
☒	EMPLID	EMPLID	EmplID		-
☒	E_ADDR_TYPE	E_ADDR_TYPE	Email Type		-
☒	PREF_EMAIL_FLAG	PREF_EMAIL_FLAG	Preferred		-

Import Record Fields

Relationships

Active	*Relationship Name	*Relationship Type	*Target Class ID	View Relationship Details		
☒		One-to-Many (Child)			+	-

Class Extensions

Type	Name	*Value		
			+	-

Object Class Definition page (2 of 2)

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Class Attributes

Parent Class	If this class object is built upon a parent class object, select it here. The class object will inherit all of the parent's attributes. Leave this field blank if the object class has no parent.
Search Component	Select the search component to search for instances for this derived class object. The system uses the Query Builder search component as a default if you do not enter a value here.
Component Interface Name	Select the PeopleTools component interface used to save data for the class. You can use the component interface in Query Builder to perform bulk updates. For example, you can create a query for all the people at Location A and then update the location information on the Job Data component for that group of people to Location B.

Edit Component

When you enter a component in this group box for a class, the system enables you to link to the component or page from a hyperlink in the query results when you query the class in Query Builder. This enables you to make updates to the component while you are reviewing the query results

Enter the component's Menu Name, Menu Bar Name, Item Name, and Page Name.

Entering Class Attribute Details

Access the Class Attribute Details page (Click the View Attribute Details icon for a class attribute on the Base Class Definition page or Object Class Definition page).

Class Attribute Details

Class Attributes

*Attribute Name:

EMPLID

Description:

EmpIID

*Active Flag:

Active

*Alias:

EMPLID

Field Name:

EMPLID

Configuration Controls

☒ Allow Modifications?

☒ Allow Deletion?

Use Options

☒ Use in Queries

☐ Use in User Interface

Key Settings

☐ Business key?

Class Attribute Extensions

	*Type	Extension Name	*Extension Value		
1	(Invalid Value)			+	-

Class Attribute Details page

- Attribute Name

Enter the attribute name. It can be different from the corresponding field.
- Alias

Enter an alias for the attribute.
- Field Name

Each attribute must have a corresponding field in the PeopleTools record.

Configuration Controls

- Allow Modifications?

Select if the users can modify the attribute in dynamic user interfaces.
- Allow Deletion?

Select if the users can delete the attribute in dynamic user interfaces.

Use Options

- Use in Queries

Select to display the class in Query Builder.
- Use in User Interface

Select to display the attribute in a dynamic user interface.

Key Settings

- Business key?

Select if the business logic indicates that this attribute (field) is a key. You do not need to define the attribute as a key field at the record level.

Class Attribute Extensions

Class attribute extensions enable you to define any additional attributes that you can access through APIs (you cannot use these properties with Query Builder). For example, you could create a Java type class attribute extension called MyJava and with a value of the Java file name that programmers can access as required.

Define the class extensions by entering values into the following fields:

- Type
- Extension Name
- Extension Value

Entering Class Relationship Details

Access the Class Relationship Details page (click the View Relationship Details icon for a relationship on the Base Class Definition page or Object Class Definition page).

Class Relationship Details

Class Relationships

*Relationship Name:

Establishment Company

*Active Flag:

Active

Description:

Company Establishments

Use Options

☒ Use in User Interface

☒ Use in Queries

Source Cardinality

☐ 0..1

☐ 0..n

☐ 1..1

☒ 1..n

Target Cardinality

☐ 0..1

☐ 0..n

☒ 1..1

☐ 1..n

*Relationship Target

COMPANY

☒ Relationship is Bidirectional?

☐ Bypass Indirection

Relationship Attribute Mapping

Customize

First

1 of 1

Last

	*Source Attribute Name	*Target Attribute Name		
1	COMPANY	COMPANY	+	-

Class Relationship Details page

- Relationship Name

Enter the name of the relationship.
- Use in User Interface

Select to display the relationship in a dynamic user interface.
- Use in Queries

Select to display the relationship in Query Builder.

Source Cardinality	Select the cardinality setting of the source class object from the following options: • zero to 1 (0.. 1) • zero to many (0.. n) • one to one (1.. 1) • one to many (1.. n)
Target Cardinality	Select the cardinality setting of the target class object from the following options: • zero to 1 (0.. 1) • zero to many (0.. n) • one to one (1.. 1) • one to many (1.. n)
Relationship Target	Select the relationship's target class object.
Relationship is Bidirectional?	Select to make the reverse relationship (with the source and target object classes reversed) automatically available.
Bypass Indirection	Select to bypass automatic setID indirection for those relationships that include setID indirection fields. Query Build automatically adds the required SetID logic as required. If you select this option, you must define the logic in the relationship attribute mapping. For example, SETID_Location maps directly to the SetID field on the Locations table (LOCATION_TABLE) to improve performance.

Relationship Attribute Mapping

Enter the names of the attributes that you are mapping. You can map any number of attributes and the attributes do not have to have the same name to be mapped.

Exporting Metadata Definitions

Access the Export Metadata Definitions page (Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Export, Export Metadata Definitions).

Export Metadata Definitions

To export all classes in the Metadata Repository, select 'Export All Class Definitions' button or use the criteria filters to view and select the definitions you wish to export.

[Export All Class Definitions](#)

Criteria Filter

Class ID:

Class Type:

Object Owner ID:

Active Flag:

[Apply Criteria](#)
[Reset Criteria](#)

Search Results

[Customize](#) | [Find](#) | |

First 1 of 1 Last

Select	Class ID	Class Name	Description	Active Flag
☒	ADDRESSES	Addresses	Addresses	Active

[Select All](#)
[Deselect All](#)

[Export Selected Definitions](#)

Export Metadata Definitions page

[Export All Class Definitions](#)

Click to export all the metadata definitions in the catalog to an XML file. The system will display the Export Metadata Definitions page where you enter the export path and file name to be created.

Criteria Filter

To limit the classes, enter filter criteria in the Class ID, Class Type, Object Owner ID, or Active Flag fields.

Note. You can select more than one class ID in this field by separating the values with commas.

[Apply Criteria](#)

Click to apply the criteria you entered. The system populates the Search Results grid with the class objects that meet the criteria.

[Reset Criteria](#)

Click to clear the search criteria fields.

Search Results

The system populates this grid with the class objects that meet your search criteria and automatically selects all of them. Deselect the check boxes next to those class objects that you do not want to export.

[Export Selected Definitions](#)

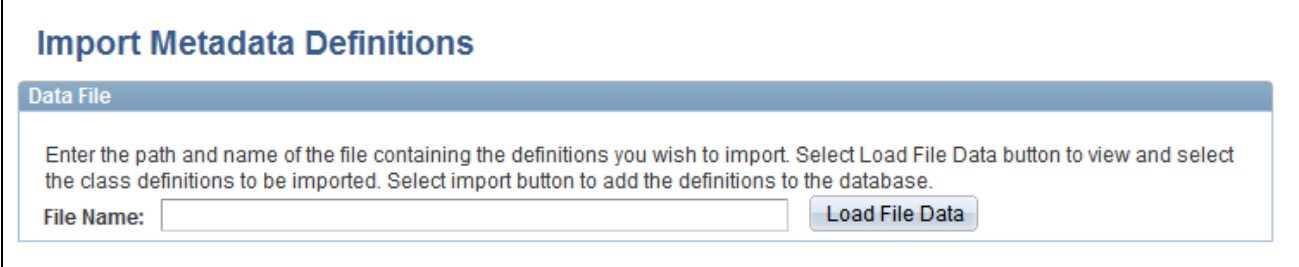
Click to export the selected class objects to an XML file.

Export Metadata Definitions Page

The system displays the Export Metadata Definitions page when you click the Export All Class Definitions button or Export Selected Definitions button. Enter the full path to the application server and the file name. If you do not specify a file name, the process will create the file in the default directory.

Importing Metadata Definitions

Access the Import Metadata Definitions page (Set Up HRMS, Product Related, Compensation, HCM Metadata Repository, Import, Import Metadata Definitions).



Import Metadata Definitions page

Enter the file path and name to load the data from the XML file. The system will display a list of classes that exist in the exported file and an icon indicates if the class already exists. Select which classes should be imported and if the system should overwrite existing class definitions.

Building SQL Queries with Query Builder

To build SQL queries with Query Builder, use the Query Builder component (EQRY_SAMP_HTML_CMP) and the Pre-defined Queries component (EQRY_VIEWER_CMP).

This section provides an overview of Query Builder and discusses how to:

- Specify, save, and load result attributes.
- Define query criteria.
- Save query definitions.
- View query results.
- Reuse queries predefined in Query Builder.

Understanding Query Builder

Query Builder is a flexible tool that is used to query class objects that are defined in the PeopleSoft HCM metadata repository.

Query Builder lets you:

- Create queries of unlimited length and complexity without the need to know the underlying database model.

Query builder automatically generates the most efficient SQL based on the metadata class definitions, generates all SQL joins automatically based on the relationships defined in metadata, and includes SetID and effective-dated logic.

- Select any number of available output fields to display results from both the underlying class and the class relationships.
- Modify current queries to include different output and criteria.
- Run previously defined queries.
- Navigate to objects that are returned as query results.
- Group the output with counts, sums, and averages and include minimums and maximums for the grouped output.

Query Builder automatically generates the appropriate SQL for aggregations.

- Preview the Structured Query Language (SQL) query generated by Query Builder.

Whereas PeopleSoft Query uses records and fields in queries, Query Builder queries objects and attributes. This approach has two benefits:

- You are more likely to recognize an object name than record and field names, and hence find it easier to query objects that are in the system.
- Underlying record and field definitions of system objects can change without affecting existing query definitions, resulting in more robust queries.

Pages Used to Build Queries

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Result Attributes	EQRY_OUTPUT_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Result Attributes	Select the object attributes that you want to use as result attributes in the query results. Select as many attributes as needed.
Save Attributes	EQRY_OUT_S_PG	Click the Save Attributes button on the Result Attributes page.	Save the result attributes of the query. Enter a name and description for the query. The query is available to all users who have access to Query Builder. If you don't want the query generally available, select Private Query.

Page Name	Definition Name	Navigation	Usage
Load Attributes	EQRY_OUT_L_PG	Click the Load Attributes button on the Result Attributes page.	Load or append predefined result attributes selection for use in the current query. The attributes that are available depend on the target object that is selected when Query Builder is invoked.
Criteria	EQRY_ISCRIPT	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria	Specify the attributes for which you want to query, and define expressions by using operators and values.
Criteria Attribute Tree	EQRY_ATT_TREE_PG	Click the Select Attribute lookup button next to the Attribute Name field on the Criteria page.	Using the object selection tree, navigate to the attribute that you want to use as query criteria and select it.
Select Value	EQRY_VBUILD_PG	Click the Value lookup button on the Criteria page.	Select the attribute value to use as query criteria
Save Criteria	EQRY_PROP_PG	Click the Save Criteria button on the Criteria page.	Save the current criteria selection by name for use in later queries. The system saves the query criteria selection for the target object that is selected when Query Builder is invoked.
Load Criteria	EQRY_LOAD_PG	Click the Load Criteria button on the Criteria page.	Load an existing criteria selection.
Results	EQRY_RESULT_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Results	Review the results of your query.
Save/Load Query	EQRY_COMBO_SAVE_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Save/Load Query	Save the current query or load a predefined query.
Pre-defined Queries	EQRY_VIEWER_PG	Set Up HRMS, Product Related, Compensation, HCM Query Builder, Pre-defined Queries	Run a query that you've predefined on the Query Builder component. The page looks like the Query Builder - Results page.

Selecting Query Attributes

Access the Result Attributes page (Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Result Attributes).

Result AttributesCriteriaResultsSave/Load Query

Class ID to Query:Effective Date

Email Addresses07/30/2009

Select Attributes

Hide More...Expand AllCollapse All

LeftRight

Email Addresses

Email Address

Email Type

EmplID

Preferred

Person Core Objects

Birth Country

Birth Location

Birth State

Date of Birth

Date of Death

EmplID

Last Update to Assignment Data

Person Data Model

Attribute Grid

Selected Attributes	Sort	Group By	Count	Sum	Avg	Min	Max
Email Addresses - Email Type		☐	☐				
Email Addresses - EmplID		☐	☐				

☒ Attribute Grid☒ Enable Outer Joins☐ Aggregations

View Results

Clear Attributes

Save As Default

Save Attributes

Load Attributes

Result Attributes page

Use the Result Attributes page to select the object attributes that you want to search against. You can select any combination of the defined attributes for the object.

At any point while defining result attributes, you can run the query and view the results. You can then return to the Result Attributes page to modify the query result attributes, go to the Criteria page to refine the query selection, or save the definitions.

Class ID to Query Displays the class ID you selected for querying on the search page.

Select Attributes

The system displays folders for the target class ID object and any other objects that have a relationship (as entered on the Object Class Definition page) with the selected class ID. In this example, you can see that both the Person Core Objects and Person Data Model objects have a relationship with the Email Addresses object.

Click the folder to view the attributes of each object. Click an attribute to add it to the attribute grid.

Select Attributes	You can rearrange the order of the selected attributes to determine the order in which they appear on the Results page. You can also determine the sort order of the data that is in each results column.
Hide	Hides the attribute tree.
More...	When Query Builder first opens, the Select Attributes tree displays the system objects that are closely related to the target object through direct association. These relationships are defined in HCM metadata and represent the objects that you most often use in queries. If you can't find the objects that you want, click the More link to access other objects .
Expand All	Click to reveal the contents of all attribute tree folders.
Collapse All	Click to collapse all attribute tree folders.
Attribute Grid	Select this check box to display the results columns as defined in the Attribute Grid.
Aggregations	Select this check box to display the results based on the groupings that are selected in the Aggregations grid.
Enable Outer Joins	Select this check box to enable the query to use outer joins to gather additional data in the query.
View Results	Click to run the query. The system opens the Results page, showing the results of the query.
Clear Attributes	(Optional) Click to remove the attributes that appear in the Selected Attributes list.
Set As Default	(Optional) Click to set the attributes that you select as the default attributes that appear each time that you use the target object.
Save Attributes	(Optional) Click to save current attribute selections as a query.
Load Attributes	(Optional) Click to load predefined attribute selections.

Attribute Grid

Selected Attributes The system populates the Selected Attributes list with the target object's list box items as they're defined in the Tools Record definition. You can add or delete attributes as necessary for your query.



Use the arrows to rearrange the attributes to determine the column display order in query results. For example, the attribute at the top of the Selected Attributes list appears as the left-most column in the query results.

Sort

(Optional) Indicate a sort order for the attribute in the column results: *Blank*, *Asc* (ascending), and *Desc* (descending). You can sort one or multiple columns. Specifying multiple sorts causes column results to sort from left to right. Column results that are sorted have a link that appears in the column header in the query results.

Aggregations

Use the check boxes in this grid to indicate how you want the results to appear on the Results page. For example, you can tell the system to group the results by order number, and within each group, sum the order amounts as well as show the minimum and maximum amounts.

Group

Select this check box to group the results by the attribute.

Count, Sum, Avg
(average), **Min**
(minimum), and **Max**
(maximum)

Select these options to have the system count the different groups. For attributes that are related to transaction amounts, the system can also sum, average, and indicate the minimum or maximum amounts.

Loading Result Attributes

Access the Load Attributes page (click the Load Attributes button on the Result Attributes page).

Select stored output column set to Load or Append to current selections					
Load	Append	Name of column selections	Description	User ID	Private Query
Load	Append	BUSINESSEMAIL	Preferred Business Emails		☐
Load	Append	JOB CODE GBI	Job Codes GBI excl SHARE&NERCT		☐

Load Attributes page

Use the Load Attributes page to add saved results columns to the query. The page displays all of the attribute sets that are saved by all users as well as the attribute sets that you save and mark as private.

Load

Replaces the result attributes in the query.

Append

Adds the result attributes onto the query.

User ID

The user who creates and saves the result attributes.

Private Query

Indicates the private queries.

Selecting Query Criteria

Access the Criteria page (Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Criteria).

Attribute Name	Operator	Value
Email Addresses - Email Type	=	BUSN
<> And Email Addresses - Preferred	=	Y

Criteria page

After you load or define the query result attributes, you can optionally add criteria to filter the query results on the Criteria page. You can only select attributes from the objects that are selected on the Results Attribute page. Specify as many criteria rows as needed, or save a criteria selection for later use to use as a predefined query selection in the current query.

By using indentation in expressions, you can create queries that are as complex as you need. Query Builder intelligently parenthesizes the expressions to ensure that the query is evaluated correctly.

Attribute Name Select the attributes from the objects connected to the class ID you're querying. Click the Select an Attribute button to view a list of all defined attributes for the object on the Select Criteria page. Select an attribute to return to the Criteria page.

Operator Select an operator to define the condition for the criteria.

Value Enter a value for the selected attribute to use as query criteria.

Selecting a Value

Access the Select Value page to select the values that you want to use to filter the query. The fields on the page differ depending on the operator that you select on the Criteria page.

If you use the between or not between operators, you select a From and To value.

If you used the like, not like, equal to, not equal, greater than, less than or equal to, less than, or greater than or equal to, you select a value for the system to compare the result to.

If you use the in or not in operator, you can select one or more check boxes for the values within which you want the system to return the results.

At any point while defining the criteria, you can click the View Results button to run the query, and then return to the Criteria or Results Columns page to modify or (optionally) save the definitions.

Working with Criteria

View Results Click to view the results of the query on the Results page.

Clear Criteria Click to remove all current attribute names and value selections and start over.

Save Criteria

(Optional) Click to save current attribute name and value selections.

After selecting the criteria, you can save the query definition for future use. On the Save Criteria page, enter a name and description for the query and indicate whether or not you want it to be a private query.

Load Criteria

(Optional) Click to load predefined attribute name and value selection.

This page works just like the Load Columns page, and displays all of the query criteria sets that are saved by all users as well as the sets that you save and mark as private.

Viewing Query Results

Access the Results page (Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Results).

	Email Type	EmplID
1	BUSN	HXSPPEE39
2	BUSN	HXSPPEE4
3	BUSN	HXSPCEE31
4	BUSN	TNALT603
5	BUSN	TYDPALC0120

Results page

Use the Results page to view the results of the query. You can click any of the links that are in the results columns to go to the application page where the attribute is defined.

Select to view the query SQL, download the query results into Excel, add new criteria, or rerun the query.

Note. When you select to download the current query results to a Microsoft Excel spreadsheet, only the results currently displayed on the page are downloaded to the spreadsheet. To download all query results, click the View All link, and then click the Download to Excel link.

Aggregations Grid

Shows the results sorted and totaled based on the check boxes that you select on the Results Columns page. This grid is only visible if you select the Aggregations check box on the Results Columns page.

Saving and Loading the Query

Access the Save/Load Query page (Set Up HRMS, Product Related, Compensation, HCM Query Builder, Query Builder, Save/Load Query).

Save/Load Query page

While defining a query, you can save the result attributes and criteria as separate definitions. This allows you the flexibility to mix and match various result attributes and criteria. You can also save a query definition, which is a combination of an output (result attributes) selection and a criteria selection.

Query Name	Enter a name under which to save the query. When you save a Query Builder query, both the result attributes and the criteria selection are saved.
Private Query	Select to make the query private and available only to the user who created it.
Load	Click load to load a predefined query.

Running Predefined Queries

Access the Pre-defined Queries page (Set Up HRMS, Product Related, Compensation, HCM Query Builder, Pre-defined Queries).

Select a query by searching on output and criteria combination, description, original class ID, or a combination of these. Then click the query result that you want to run. Click the View Definition link to access the Query Builder component, where you can change the results columns, attributes, or criteria of the query and rerun the query.

Note. Predefined queries are also available by loading existing query definitions from within Query Builder.

Chapter 30

Working with HCM Transformation Framework

This section provides an overview of HCM Transformation Framework and discusses how to set up and manage HCM transformation maps.

Understanding the Transformation Framework

When an application sending a service operation uses a message structure different than the application receiving it, the message must be transformed in order to be accepted by the target application. HCM Transformation Framework uses definitional logic to transform messages. Using information you set up, the transformation framework applies the correct transformation logic to produce a message that complies with the target application requirements.

HCM Transformation Framework enables seamless integration among PeopleSoft applications as well as with third-party applications such as Oracle, SAP, and Siebel. Transformation schemas are associated with transformation maps, enabling you to quickly locate and modify a schema to respond to external changes.

The transformation map registry is made up of transformation maps. The transformation map defines the message properties of the message for both the target and source application. For each transformation map, create a transformation schema, an XML document that defines the message structure mapping between two applications.

When a message needs to be transformed in order to be successfully received by an application, you need to assign a transformation program with the message on the Integration Broker Relationships component (IB_RELATIONSHIP).

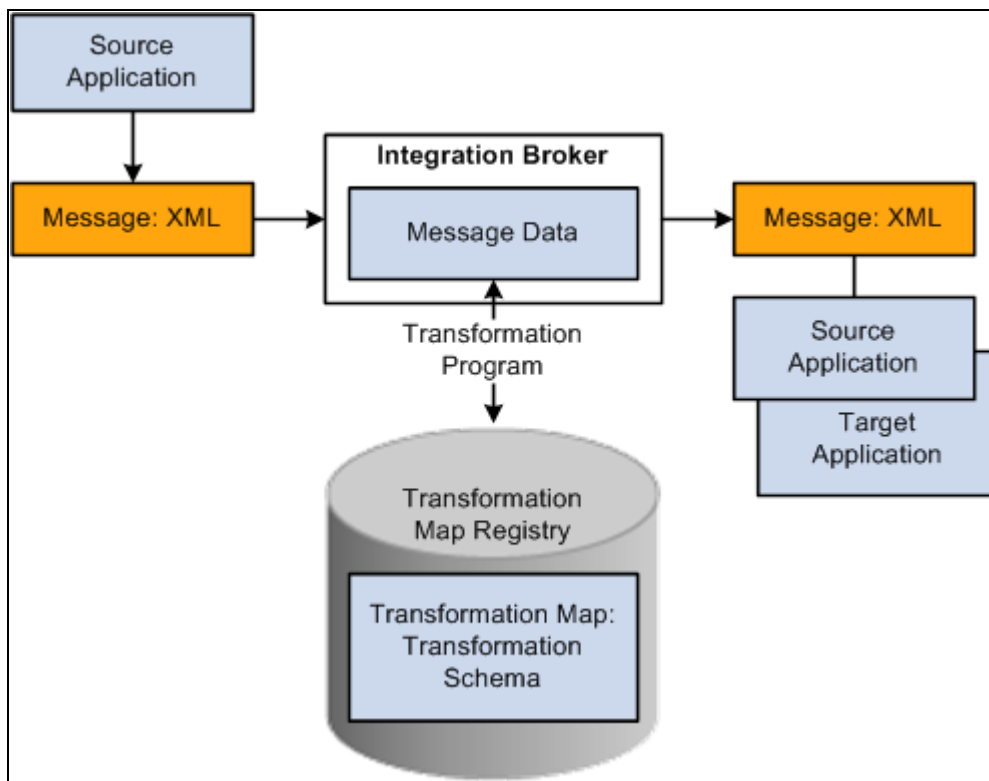
There are six transformation programs supported by the transformation framework:

- HTMF_TR_IA, for inbound asynchronous communications.
- HTMF_TR_IS, for inbound synchronous communications.
- HMTF_TR_ISR: for the inbound synchronous response.
- HTMF_TR_OA, for outbound asynchronous communications.
- HTMF_TR_OS, for outbound synchronous communications.
- HMTF_TR_OSR for outbound synchronous responses.

Based on the type of transaction, choose the appropriate transformation program to associate with your message.

When an application publishes a message that requires transforming, PeopleSoft Integration Broker invokes the transformation program associated with the message. The transformation program determines which transformation map corresponds to the target message and applies the transformation schema to the message data using XSLT, an XML translation language. The transformation schema can modify the metadata or the message data itself to comply with the target application requirements. PeopleSoft Integration Broker repackages the transformed message data into an XML document that is structurally compliant with the target application. The Integration Broker can then deliver the message to the receiving application.

This diagram illustrates the flow of information from one application to another using HCM Transformation Framework:



Transforming data using the transformation framework

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker, "Applying Filtering, Transformation and Translation"

Base Message Format in PeopleSoft Integration Broker

Before you create a transformation schema, it helps to understand the base XML document format used by PeopleSoft Integration Broker to package application data:

```

<?xml version="1.0"?>
<PeopleSoftMessageName>
  <FieldTypes>
    <RecordName1 class="R">
      <fieldname1 type="CHAR"/>
      <fieldname2 type="NUMBER"/>
      ...
    </RecordName1>
    <RecordName2 class="R">
      <fieldname1 type="CHAR"/>
      <fieldname2 type="NUMBER"/>
      ...
    </RecordName2>
    ...
  </FieldTypes>
  <MsgData>
    <Transaction>
      <RecordName1 class="R">
        <fieldname1>Fieldvalue</fieldname1>
        <fieldname2>Fieldvalue</fieldname2>
        ...
      <RecordName2 class="R">
        <fieldname1 type="CHAR"/>
        <fieldname2 type="NUMBER"/>
        ...
      </RecordName2>
    <PSCAMA class="R">
      <AUDIT_ACTN>ActionCode</AUDIT_ACTN>
    </PSCAMA>
    ...
  </Transaction>
  ...
</MsgData>
</PeopleSoftMessageName>

```

This format is then packaged into an XML document for transmission to the target application. If you have attached one of the supported framework transformation programs to the message, the transformation program identifies the appropriate transformation map and applies the transformation schema to the message, modifying its structure. The message is then repackaged into an XML document in its altered form and delivered.

Note. The transformation message must be supported by the transformation framework. Only supported programs can work with the transformation maps. You can also add configured Application Engine or XSLT transformation programs as part of the relationship definition independent of the transformation framework.

The transformation program can modify the following elements of the standard message structure:

PeopleSoftMessageName The name of the message as it is defined in PeopleSoft using Application Designer.

The transformation program can change the message name.

FieldTypes The metadata for the records and their fields.

The transformation program can select the fields required by the target applications and can change their names.

Transaction

Contains the data for the records and their fields and organizes them into a hierarchy. The record tags at each level contain the fields for that record.

The transformation program can select one or more record subsets and their fields or just a subset of fields required by the target service operation and can change their names.

PSCAM (PeopleSoft Common Application Message Attributes)

The last record within a transaction that provides information about the entire transaction. The PSCAMA record contains fields that are common to all messages. The <PSCAMA> tag repeats for each row in each level of the transaction section of the message. The sender can set PSCAMA fields to provide basic information about the message, for example, to indicate the message language or the type of transaction a row represents.

The transformation program copies this structure to the target message structure.

Setting Up and Managing HCM Transformation Maps

To set up and manage HCM transformation maps, use the Register Transformation Map component (HMTF_WZ_STEP1) and the Transformation Registry component (HMTF_TRF_REGISTRY).

This section discusses how to:

- Set up transformation maps.
- Use the HCM transformation registry.

Pages Used to Set Up and Manage HCM Transformation Maps

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Register Transformation Map	HMTF_WZ_STEP1	Set Up HRMS, System Administration, HCM Registry, Register Transformation Map, Register Transformation Map	Define or modify transformation maps (transformation XML schemas).
Transformation Registry	HMTF_TRF_REGISTRY	Set Up HRMS, System Administration, HCM Registry, Transformation Registry, Transformation Registry	Organizes the transformation maps by message name, message version, application version, and transaction type. Click a transformation map URL to modify the transformation map

Setting Up HCM Transformation Maps

Access the Register Transformation Map page (Set Up HRMS, System Administration, HCM Registry, Register Transformation Map, Register Transformation Map).

Register Transformation Map

From
Message Name
PERSON_BASIC_SYNC
Message Version
INTERNAL

To
Message Name
PERSON_BASIC_SYNC
Message Version
VERSION_3

***Application Release**
Default

Transaction Type
Outbound Asynchronous

Object owner identifier
HR Core Objects

UUID
HC_UUID_99714441030072009

Transformation Definition

Cancel

Update

Register Transformation Map page

The system stores the map as an HTML template in the portal registry (HC_REGISTRY) in the HCM Transformation Maps component.

- Message Name and Message Version**

Select the message name and version for both the source (From) and target (To) application.
- Application Release**

Select the release of the source application.
- Transaction Type**

Indicate if the type of transaction is *Inbound Synchronous*, *Inbound Asynchronous*, *Outbound Synchronous*, *Outbound Asynchronous*, *Inbound Synchronous Response*, or *Outbound Synchronous Response*.
- Object owner identifier**

Select the owner of the object.

Transformation Definition	Define the mapping information (schema) to map the source service operation structure to the target service operation structure.

Defining the Transformation Schema

The transformation definition contains the following code:

```
<?xml version="1.0"?>
<transformation type="IA" application_release="Application Name and?
Release" default_node="Default Node Name">
  <structure>
    <message message_name="Original Message Name" new_message_name="New Message?
Name">
      <TargetMessageRecord class="R" source_record="SourceMessageRecord ">
        < TargetMessageRecordField1 type="CHAR" value="DefaultValue"/>
        < TargetMessageRecordField2 type="CHAR" source_field="SourceMessageRecord?
Field" [source_record="SourceMessageRecord"/>
        ...
      </TargetMessageRecord>
    </message>
  </structure>
</transformation>
```

Enter values in the following elements:

XML Tag	Elements	Values
transformation	type	Enter a transformation type. Supported values are: - Inbound Asynchronous. - Inbound Synchronous. - Outbound Asynchronous. - Outbound Synchronous.
	application_release	(Optional) Enter the Category.AppRelease property of the relationship defined in PeopleSoft Integration Broker.
	default_node	(Optional) Enter the default node to be used.
message	message_name	Enter the name of the source service operation.
	new_message_name	(Optional) Enter the name of the message in the transformed structure.
[TargetMessageRecord] Note. Edit this tag so that it is the name of the target message record.	class	Enter the element class. The value is R for PeopleSoft record based message structure.
	source_record	(Optional) Enter the name of the source record. You should enter a value if the names of the source and target records are different.

XML Tag	Elements	Values
[TargetMessageRecordField] Note. Edit this tag so that it is the field name in the target message record.	type	Select the data type of the field of the transformed message for the target application. Valid values are: - CHAR - DATE - NUMBER
	source_field or value	Enter the name of the source record field name whose values should be copied in the transformed message structure for the target application <i>or</i> enter the default value that should be copied in the transformed message structure for the target application. Note. Enter a value in source_field or value, but not both.

Using the HCM Transformation Registry

Access the Transformation Registry page (Set Up HRMS, System Administration, HCM Registry, Transformation Registry, Transformation Registry).

Transformation Registry

Left | Right

-  HCM Transformation Maps
 -  JPM_JP_FULLSYNC
 -  JPM_JP_SYNC
 -  JPM_JP_TYPE_FULLSYNC
 -  JPM_JP_TYPE_SYNC
 -  PERSON_BASIC_SYNC
 -  INTERNAL
 -  [OA] Outbound Asynchronous
 -  PERSON_BASIC_SYNC
 -  VERSION_3
 -  [\[\[0000\] Default - \]](#)
 -  PERSON_OWS_FULLSYNC
 -  PERSON_OWS_SYNC
 -  SCHEDULED_TIME_FULLSYNC
 -  SCHEDULED_TIME_SYNC
 -  STUDENT_COST_SYNC
 -  TRAINING_HOUR_SYNC

Transformation Registry page

Drill down to the transformation map by message name, message version, application version, and transaction type. Click the template URL to access the Transformation Map page for the transformation map.

Chapter 31

Setting Up and Generating Form Letters

This chapter provides an overview of HRMS form letters and discusses how to:

- Generate form letters for PeopleSoft Enterprise Human Resources.
- Set up standard letter codes.
- Generate form letters for other PeopleSoft HRMS applications.
- Review sample form letters.

Understanding PeopleSoft HRMS Form Letters

This section lists prerequisites and discusses using PeopleSoft HRMS form letters.

Prerequisites

Use PeopleSoft Process Scheduler in PeopleSoft Human Resources to generate the sample form letters that are delivered with PeopleSoft HRMS. The PeopleSoft Process Scheduler runs a job that:

1. Executes a Structured Query Report (SQR), with SQRibe Technology's Structured Query Report Writer to extract data from the database.
2. Merges the data into a document template, with Word as the word processor.
3. Posts the resulting letters on the web server.

If you currently use a report writer other than SQRibe Technology's Structured Query Report Writer or a word processor other than Word, review the information in this chapter to understand the steps that are involved in generating form letters. Then, consult your report writer or word processor documentation to modify the procedures to fit the sample letters.

Once you are familiar with the sample form letters, you can modify the letters or create new ones for other tasks.

Note. To generate letters, you should be familiar with the Word mail merge functions.

See Also

Chapter 31, "Setting Up and Generating Form Letters," Adapting Form Letters, page 790

Using PeopleSoft HRMS Form Letters

PeopleSoft HRMS delivers a set of sample form letters for use with PeopleSoft HRMS applications. There are two methods for generating form letters; one for PeopleSoft Human Resources and one for applications other than PeopleSoft Human Resources (referred to as other PeopleSoft HRMS applications).

Please follow the appropriate method to create your form letters successfully.

Many human resource management activities involve sending out routine letters and memos on a regular basis. For example:

- (PeopleSoft Human Resources) Letters announcing course session enrollments, cancellations, and rescheduling.
- (PeopleSoft Enterprise Global Payroll, Pension Administration, Benefits Administration) Letters, notification forms, and plan updates.

The wording of such letters doesn't change much from mailing to mailing; what does change is information such as addresses and dates. In PeopleSoft HRMS, you can create form letters in your word processor by accessing the data that you need from your human resources database.

You can generate several types of letters and print them all at the same time, or you can generate letters now and print them later, if you prefer to review them first. Three sample form letters are provided at the end of this chapter.

See Also

Microsoft Word Legal User's Guide.

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Training, "Enrolling and Wait-Listing Students"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration, "Setting Up Labor Administration Data," Setting Up Labor Administration Disciplinary, Grievance, and Resolution Classifications

PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook, "Defining Installation Options for Recruiting"

PeopleSoft Enterprise Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway"

Generating Form Letters for PeopleSoft Human Resources

This section provides an overview of form letters for PeopleSoft Human Resources and discusses how to:

- Generate form letters with PeopleSoft Process Scheduler.
- Use naming conventions in form letter files.
- Set up form letters.

- Prepare to print form letters.
- Adapt form letters.
- Troubleshoot form letters.

Note. These instructions show you how to use templates to create form letters for PeopleSoft Human Resources. To create form letters for other PeopleSoft HRMS applications, you follow a different method. Please follow the appropriate instructions to create your form letters.

See Also

Chapter 31, "Setting Up and Generating Form Letters," Generating Form Letters for Other PeopleSoft HRMS Applications, page 799

Understanding Form Letters for PeopleSoft Human Resources

PeopleSoft delivers a set of sample letters for use with the following:

- PeopleSoft Human Resources: Administer Training
- PeopleSoft Human Resources: Manage Labor Administration

The form letter processes search the database for records that have been tagged with specific letter codes. For example, when you enroll an employee in a training course using the Administer Training business process, you can add a letter code to the employee record that identifies the type of letter required. When you later run the training letter report, the system searches for records with the letter codes for training letters.

The form letter processes use Word to generate the letters based on data extracted from the PeopleSoft database.

To generate form letters for PeopleSoft Human Resources:

1. Create letter codes by using the Standard Letter Table page (STANDARD_LTR_TABLE).

Letter codes represent form letters and are used to link a record to the required letter.

2. Tag people's records with the appropriate letter code in the PeopleSoft Human Resources database.

Enter a letter code into the records of applicants, employees, contingent workers, or people of interest to flag the record when it's time to generate a form letter.

For example, when you enroll or add students to waiting lists for training courses, the system inserts letter codes into employee, contingent worker, and person of interest records.

3. Generate form letters by running a report that runs the following processes:

- a. An SQR data extract process.
- b. A WinWord WORDINIT process.
- c. The PSMERGE Application Engine process.

The final step is completed by the Distribution Agent that moves the letter files to the Report Repository.

4. Send training letters by email.

This step is for the training letters only. The system also emails training letters to students if their email addresses are in their person records.

Note. You must configure SMTP and activate Workflow to automatically send training letters by email.

See *Enterprise PeopleTools PeopleBook: System and Server Administration*

5. Print the letters by using Microsoft Word.

The system creates the form letters in a temporary directory on the web server, putting all letters of the same type in one file.

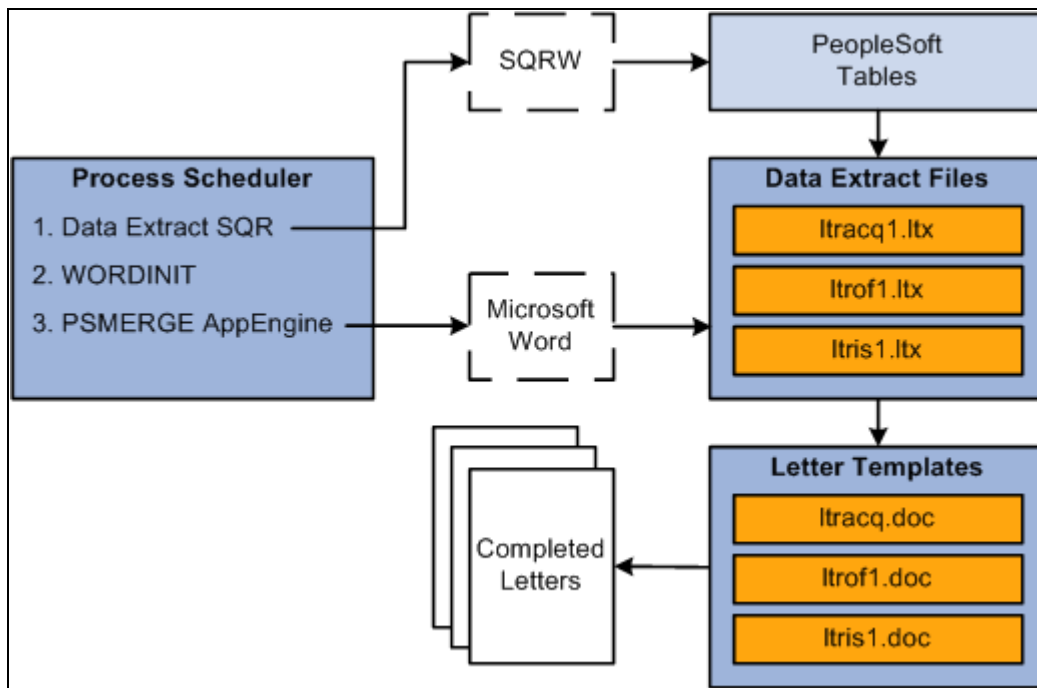
The distributed architecture of the PeopleSoft Human Resources system enables you to access the application server far from local machines therefore the system doesn't print letters to a default printer. Instead, you select where you want to print the letters by using standard Microsoft Word print options.

See Also

Chapter 31, "Setting Up and Generating Form Letters," Setting Up Standard Letter Codes, page 797

Generating Form Letters

This diagram and the steps below illustrate how PeopleSoft Process Scheduler generates form letters for PeopleSoft Human Resources:



Generating form letters for PeopleSoft Human Resources with PeopleSoft Process Scheduler

Step 1: SQR Data Extract Process

The SQR data extract process:

- Identifies records in the database with the appropriate letter codes (and no print date).
- Extracts data from these tagged records.
- Updates the Print Date field in the tagged records.
- Creates a data extract file (with an .ltr extension) that contains the data for each letter.

For example, the file containing data for offer letters is ltrof1.ltr, where of1 represents offer letter, and .ltr represents letter.

The SQR process sends its output to the log/output directory defined for SQR reports. Define the log/output directory in the Process Scheduler configuration file.

Step 2: WORDINIT WinWord Process

The WORDINIT WinWord process is an initialization process. Its purpose is to ensure that the PSMERGE application engine process can retrieve the location of:

- The executable file for Microsoft Word, winword.exe.
- The PS_HOME directory that contains the letter templates.

The WORDINIT process runs winword.exe and a dummy macro called PSINIT which opens and closes the psmerge.doc file without creating any output. By including the WORDINIT WinWord process in the job definition, the Process Scheduler ensures that it has loaded the location of the winword.exe file into PSPRCSPARMS.

The PSMERGE application engine process uses this information to call Microsoft Word.

Step 3: PSMERGE Application Engine Process

The PSMERGE Application Engine process completes the merge of the data extract files and the Word templates. It:

- Retrieves the locations of the data extract files, winword.exe and the PS_HOME Winword directory.
- Creates a file called param.txt in the log/output directory.

This file contains the locations of the files and a list of files to be merged.

- Calls Microsoft Word to carry out the merge.

Microsoft Word:

- Opens the form letter templates that correspond to the data extract files.
- Merges the appropriate extract file data into the field codes for each template.

For example, the offer letters template is ltrf1.doc and it includes field codes for names, addresses, and offer amounts.

- Inserts the data from the appropriate .ltr file into the template field codes.

For example, it inserts the data from the ltrf1.ltr extract file into the ltrf1.doc template.

- Places the resulting letters in the log/output directory.

Using Naming Conventions in Form Letter Files

Before you adapt existing form letters or create new ones, you should be familiar with the naming conventions for each element of the process. Use the same naming conventions for the new form letter components that you create.

This section discusses how to:

- Use letter codes.
- Use data extract files and corresponding Word letter templates.

Using Letter Codes

You create letter codes in the Standard Letter Table component. Use letter codes to indicate what kind of letter is required for a particular record. The standard letter codes that are delivered by PeopleSoft for use with the sample letters are listed below.

Using Data Extract Files and Corresponding Word Letter Templates

The extension .ltr represents form letters and the extension .doc is the normal templates extension. Every letter code for which you generate form letters must have a corresponding data extract file and a template with the same name of the data extract file:

<i>Object</i>	<i>Example</i>
New letter code	xyz
Data extract file name	aaaxyz.ltr
Template name	aaaxyz.doc

The letter codes and their associated data extract files and Word templates include:

- Training letters

<i>Purpose of Letter</i>	<i>Letter Code</i>	<i>Data Extract File</i>	<i>Word Letter Template</i>
Confirmation of session enrollment	CON	ltrcon.ltr	ltrcon.doc
Rescheduling of course session	RSC	ltrrsc.ltr	ltrrsc.doc
Cancellation of course session	CAN	ltrcan.ltr	ltrcan.doc

Note. The Standard Letter Table also contains two codes, WTC and WTS, that are used in Administer Training for students on waiting lists. However, these codes don't have macros or sample letters associated with them.

- Labor Administration letters

<i>Purpose of Letter</i>	<i>Letter Code</i>	<i>Data Extract File</i>	<i>Word Letter Template</i>
Confirmation of Disciplinary Action Filed	DAF	ltrdaf.ltr	ltrdaf.doc
Confirmation of Disciplinary Action Resolution	DAR	ltrdar.ltr	ltrdar.doc
Confirmation of Grievance Filed	GRF	ltrgrf.ltr	ltrgrf.doc
Confirmation of Grievance Resolution	GRR	ltrgrr.ltr	ltrgrr.doc

Setting Up Form Letters

This section discusses how to:

- Set up the Process Scheduler.
- Set up WinWord security.
- Set up document templates.
- Run the WORDSAMP process.

- Specify the output type and format of the SQR process.

Setting Up the Process Scheduler

To set up your Process Scheduler to generate form letters:

1. Install the Microsoft Word on the same machine that runs the Process Scheduler.
2. Define the WINWORD parameter in the Process Scheduler configuration file.

The WINWORD parameter defines the location of the Microsoft Word executable file, winword.exe on the server. Make sure that there are no spaces in the path and the path does not end with a slash (/).

3. Use the Process Scheduler Manager to define a server specifically for running the form letter processes.

Select PeopleTools, Process Scheduler Manager, Use, Server Definitions to define the server. On the Distribution page, leave the Transfer Log Files to Report Repository check box deselected.

If you run the Process Scheduler as a service, modify the service to interact with the desktop:

1. From the Windows Control Panel, open Administrative Tools, Services.
2. Open the Process Scheduler service and access the log on tab.
3. For the Log on as field, select Local System account and select the Allow service to interact with desktop check box.

This enables Microsoft Word to run in the foreground of the server. You cannot run Microsoft Word macros as a background service.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Appendix: Using the PSADMIN Utility"*

Setting Up Winword Security

To run the macro that completes the merge, you must set the macro virus protection to Low. To do this:

1. Run Microsoft Word and select Tools from the menu bar.
2. Configure security according to the version of Word you are running.

See *Microsoft Word Legal User's Guide*

Setting Up Document Templates

To generate form letters, the document templates and the macros must be located in the directory %PSHOME%\winword.

Check that the files psmerge.doc and psmerge.dot, and all the document templates in this directory are read-only.

Running the WORDSAMP Process

Before running any of the form letters processes, test your environment by running the WORDSAMP process. If this process runs successfully, this demonstrates that the environment is correctly configured to run Microsoft Word processes.

Note. To verify that the WORDSAMP process has successfully completed verify that it has created a document called wordsamp.doc.

To run the WORDSAMP process:

1. Select PeopleTools, Process Scheduler, System Process Requests. Select a Run Control ID and click Run.
2. The Process Request Dialog page (PRCSSAMPLEPNL1) appears.
3. Select your server in the Server Name field and select the Win Word Sample Process check box.
4. Click OK.
5. Click the Process Monitor link to check that the process runs successfully (Run Status is *Success*).
6. Check that a document wordsamp.doc is created. This document is posted to the Report Repository as a normal report.

If the process doesn't run successfully or the process doesn't create wordsamp.doc, then your environment is not set up correctly to run WinWord processes.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling a Process Request"

Specifying the Output Type and Format of the SQR Process

When you run the form letter report to generate letters, make sure that the Type and Format fields are set up correctly for the SQR data extract process. The SQR process must be set up with Type set to *File* and Format set to *LP*.

For example, if you are creating a training letter, check the output type and format as follows:

1. Select Enterprise Learning, Student Enrollment, Create Training Letters, Training Letters page (RUNCTL_TRN001).
2. Enter run parameters and click Run.
3. On the Process Scheduler Request page, click *Training Letters* to access the Job Detail page.
4. In the Process List group box, which lists the three processes run to generate letters, locate the SQR process TRN001 and select *File* in the Type field and *LP* in the Format field.

For information about running the form letter reports, refer to the appropriate PeopleSoft Human Resources PeopleBook.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Labor Administration*, "Tracking Disciplinary Actions and Grievances."

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Training*, "Enrolling and Wait-Listing Students," Generating Student Form Letters.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook*, "Managing Applicants," Generating Batch Recruitment Letters.

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file.

Depending on your configuration, you may need to make these changes to the standard Microsoft Word macros that are supplied by PeopleSoft:

- Default path to the empty.doc file that contains all the macros.
- Location of the letters produced.

The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Microsoft Word, you print them to your local printers.

To set up the system to print form letters:

1. On the Servers - Distribution page, create a new dedicated Process Scheduler leaving the Transfer System Files to Report Repository check box deselected to run form letters.
2. Define the WINWORD variable in the process scheduler configuration file.

WINWORD defines the location of the Microsoft Word executable file that the process scheduler runs to produce the form letters. For example, if Microsoft Word is run on the application server, you might have this line in the process scheduler configuration file:

```
WINWORD=C:\APPS\OFFICE97\OFFICE
```

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Adapting Form Letters

Form letters are useful for many administrative tasks besides those for which we deliver sample letters. You can modify the sample form letters in several ways, from simple changes to text in the templates to adding the Letter Code field to other pages in PeopleSoft Human Resources.

This section discusses how to:

- Modify the text in sample letter templates.
- Add fields to sample letters.
- Create new form letters.
- Add letter code fields to pages.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft Human Resources contain sample text for different types of tasks that you can change to suit your needs. For example, you'll probably want to change the sender names in the letters to the names of the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, use the following procedure.

To modify the text in a form letter:

1. Find the Word letter template to update.

Templates are located in the directory \PS\WINWORD.

2. In Microsoft Word, open the document that you want to modify.

If you see " " in the document, select Tools, Options; then select the Field codes check box.

3. Make changes to the text as you would in any other document and save the file.

Warning! Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that are extracted from PeopleSoft Human Resources.

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft Human Resources.

Note. To make this change, you should be familiar with Microsoft Word fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all of the fields that you want to use and writes them to the appropriate data extract files.

For example, to include title in the Training Enrollment Confirmation letter ltrcon.doc, add a title field code to the form letter template. Also add a variable for title in TRN001.sqr so that the SQR retrieves the title value and writes it to the data extract file.

Here's what the data extract file looks like before the change:

```
systemdate, Name, . . . ,
"August 10, 2001", "Barry Robert Campbell"
```

Here's what it looks like after the change:

```
systemdate, Name, Title....
"August 10, 2001", "Barry Robert Campbell", "Director". . .
```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to create a form letter notifying students they are on the waiting list for a course session.

To create a new form letter:

1. Create a new letter code in the Standard Letter table.
2. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

The file name of the template must match the data extract (.ltr) file name. For example, if the data extract file is app004.ltr, the Word template file must be called app004.doc.

You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.

For example, create a form letter for interview schedules (INT) by adapting the offer letter template. In the directory \PS\WINWORD, open ltr0f1.doc. Modify the text as needed and add any new field codes that you want to use in the letter. Save the new template under a different name, ltrint.doc.

end-procedure

If you create an Application Engine process, the file created by the process must have an .ltr extension.

See *Enterprise PeopleTools PeopleBook: SQR for PeopleSoft Developers*

4. Copy the new letter template to the Process Scheduler %PS_HOME%\winword directory.
5. Create a PSJOB to ensure that the SQR, WORDINIT, and PSMERGE processes are run in the correct order.

Define the job to include these steps in the following order:

- a. SQR process or Application Engine data extract process.
- b. WORDINIT Winword process.
- c. PSMERGE application engine.

Note. PeopleSoft recommends that you do not modify any of the delivered Winword macros or templates.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see the references below.

Adding Letter Code Fields to Pages

We deliver PeopleSoft Human Resources with Letter Code fields in several pages in Administer Training, Administer Workforce, and Manage Labor Relations.

You can add the Letter Code field to any other pages (and their underlying tables) in PeopleSoft Human Resources. For example, if you routinely send letters to employees, notifying them of career planning sessions, you can add the Letter Code field to one of the pages from the Plan Careers menu.

Note. To make this change, you should be familiar with PeopleSoft Application Designer; Microsoft Word field codes, macros, and data statements; and the SQRs that are used to extract data values from your PeopleSoft Human Resources database.

When you add the Letter Code field to another page and its underlying table or tables in the system, also create:

- A letter code that represents the particular application.
- A form letter template with the appropriate text, field codes, and data statements.
- An SQR that extracts data from the correct tables in PeopleSoft Human Resources and creates new data extract files.
- A job containing the SQR, WinWord process WORDINIT, and the Application Engine PSMERGE.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications, "Working With Processes and Reports"

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Microsoft Word Legal User's Guide

Troubleshooting Form Letters

This section discusses:

- Troubleshooting the SQR process.
- Troubleshooting the WORDINIT process.
- Troubleshooting the PSMERGE Application Engine process.
- Troubleshooting the Process Scheduler.
- Troubleshooting the Winword Directory.
- Troubleshooting Winword processes.
- Troubleshooting the PSMERGE process.

Troubleshooting the SQR Process

For the SQR data extract process check that:

- The process is run with the output Type set to *File* and Format set to *LP*. If you have run the SQR with any other output type or format, make sure that you delete these data extract files.
- The data extract file has been produced in the format xxx.ltr in the Process Scheduler log/output directory.
- Use the Process Monitor to delete all failed Process Requests.

Troubleshooting the WORDINIT Process

If the WORDINIT process fails and the environment is correctly configured, the most likely cause is macro security. Switching off the macro security works for some Microsoft NT networks. You may also need to consult your Systems Administrator.

In some networks, Microsoft Word automatically switches the security level back to "high" when running the process. For example, if Winword macro security is defined at the NT User Profile level then you need to set macro security to "low" for the NT ID that starts the Peoplesoft Process Scheduler service.

Note. Windows locks and caches the macro virus protection settings for Winword and this may cause difficulties when turning off the macro virus protection.

Try hard-coding the path to PS_HOME in the Process Definition for WORDINIT:

1. Navigate to PeopleTools, Process Scheduler, Processes.
2. Select Process Name in the Search By field and enter WORDINIT.
3. Select the Override Options page.
4. In the Parameters field replace %%PS_HOME%% with the hard-coded path to the directory.

Troubleshooting the PSMERGE Application Engine Process

If the PSMERGE Application Engine process does not complete and you have added extra fields to the SQR data extract process, check that the fields have also been included in the document template and that the fields occur in the same order.

Troubleshooting the Process Scheduler

Check that the Process Scheduler is configured correctly:

- You must define a separate Process Scheduler server at Process Scheduler Definition level with the Transfer Log Files to Report Repository check box deselected.
- Confirm that the WINWORD parameter is correctly specified in the prcs.cfg file.

Check that all failed attempts at running the form letters have been deleted using the Process Monitor. Delete any Process Requests that have failed.

Use the Windows Task Manager to check that there are no Winword processes still running. Delete these before rerunning the form letter report.

Once Microsoft Word is interacting with the desktop it may try to reinstall itself. To avoid this, disable the Windows Installer.

Troubleshooting the Winword Directory

Check that the template files are in the correct directory with the correct access:

- The Winword templates and the macros must be located in the %PS_HOME%\winword directory.
- The files psmerge.doc and psmerge.dot and the document templates in the %PSHOME%\winword directory must be read-only.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

Troubleshooting Winword Processes

To display errors and debug the Winword Processes, modify your Process Scheduler configuration file, psprcs.cfg, by adding the following line to the Process Scheduler section of the file (after the line for the Allow Dynamic Changes parameter):

Allow To Interact With Desktop=1

Save the changes, clear the cache and re-start the application server.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, "Using the PSADMIN Utility"*

Troubleshooting the PSMERGE Process

If the PSMERGE Application Engine process is failing or the status remains as *Processing*, take the trace file, AE_PSMERGE_<PI>.trc (where <PI> is the process instance number), and extract the arguments from the file, combine them and run them from a command line. This tests the process outside the Process Scheduler.

For example if AE_PSMERGE_<PI>.trc is set up as follows:

```
cmd = D:\PSHR88\WINWORD\run.bat
cwd = (null)
argc = 5
argv[0] = D:\PSHR88\WINWORD\run.bat
argv[1] = C:\PROGRA~1\MICROS~4\OFFICE\WINWORD.EXE
argv[2] = D:\PSHR88\appserv\prcs\HCUPG3WD\log_output\AE_PSMERGE_387\387_PARAM.TXT
argv[3] = D:\PSHR88\WINWORD\PSMERGE.DOC
argv[4] = /mPSMERGE
```

You run them from the DOS command line as follows:

```
D:\PSHR88\WINWORD\run.bat C:\PROGRA~1\MICROS~4\OFFICE\WINWORD.EXE
D:\PSHR88\appserv\prcs\HCUPG3WD\log_output\AE_PSMERGE_387\387_PARAM.TXT
D:\PSHR88\WINWORD\PSMERGE.DOC /mPSMERGE
```

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine, "Tracing Application Engine Programs"*

Setting Up Standard Letter Codes

To set up standard letter codes, use the Standard Letter Table component (STANDARD_LTR_TABLE).

This section discusses how to set up standard letter codes.

Note. You set up letter codes only for PeopleSoft HRMS form letters used with PeopleSoft Human Resources. You do not set up letter codes for PeopleSoft HRMS form letters used with other PeopleSoft HRMS applications.

Pages Used to Set Up and List Standard Letter Codes

Page Name	Definition Name	Navigation	Usage
Standard Letter Table page	STANDARD_LTR_TABLE	Set Up HRMS, Common Definitions, Standard Letter Table, Standard Letter Table	Define your letter codes.
Standard Letter Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Letters and Documents, Standard Letter Report, Run Control	Run the Standard Letter Table report (PER711) that lists the codes in your Standard Letter table.

Setting Up Standard Letter Codes

Access the Standard Letter Table page (Set Up HRMS, Common Definitions, Standard Letter Table, Standard Letter Table).



Standard Letter Table

Letter Code: DAF

*Set Letter Code: Manage Labor Relation

*Description: Disciplinary Action Filing

Short Description: Filing

Standard Letter Table page

PeopleSoft delivers letter codes for the sample letters that are supplied as standard. You can add your own codes to generate other form letters.

Note. PeopleSoft delivers a letter code for each template, but not all letter codes have a template. Before you use a letter code, confirm that there is a corresponding template.

Set Letter Code

Select a code from the available options. This code is used to group similar letter codes, making it easy for you to find the code that you want. Options are:

- *COBRA Letter:* Select for COBRA letters
- *Customer Letters:* Select if you have created letters for your organization that don't fit into any other category.
- *Employee Review Letters:* Select for employee review letters.
- *HIPPA Certificate:* Select for HIPPA letters.
- *Manage Labor Relation:* Select for labor relations letters. Standard disciplinary and grievance letters.
- *Recruitment Letters:* Select for applicant letters.
- *Training Letters:* Select for training letters.

The system uses the Set Letter Code field to determine which letter codes to list for the Set Letter Code fields.

Generating Form Letters for Other PeopleSoft HRMS Applications

This section provides an overview of form letters for other PeopleSoft HRMS applications and discusses how to:

- Generate form letters with PeopleSoft Process Scheduler.
- Use naming conventions in form letter files.
- Prepare to print form letters.
- Adapt form letters.

Note. These instructions show you how to use templates to create form letters for other PeopleSoft HRMS applications. To create form letters for PeopleSoft Human Resources, you follow a different method. Please follow the appropriate instructions to create your form letters.

See Also

Chapter 31, "Setting Up and Generating Form Letters," Generating Form Letters for PeopleSoft Human Resources, page 782

Understanding Form Letters for Other PeopleSoft HRMS Applications

Before you generate any form letters or modify any of the sample form letters that are delivered with PeopleSoft HRMS, you need to understand how the process works for PeopleSoft HRMS applications other than PeopleSoft Human Resources.

To generate form letters for other PeopleSoft HRMS applications:

1. Use the report writer to run SQRs.

The SQRs search your PeopleSoft HRMS database, retrieve data, and create data extract files containing one line of data for each letter.

2. Use Microsoft Word to run the macros that merge the data extract files into form letter templates, one for each type of letter.

To generate form letters by using PeopleSoft Process Scheduler, PeopleSoft delivers two files (stdltr.dot and stdltr.95 located in the \PS\WINWORD directory on your application CD) containing the Word macros. You must use the file that is appropriate for your system.

- The macros in stdltr.dot are for use with Word 97 (in Microsoft Office 97) and are written in Visual Basic.
- The macros in stdltr.p5 are for use with Word 7.0 (used in Microsoft Windows 95) and are written in Word Basic.

If you need to use stdltr.95, copy it to your system and rename it stdltr.dot.

3. Print the letters by using Microsoft Word.

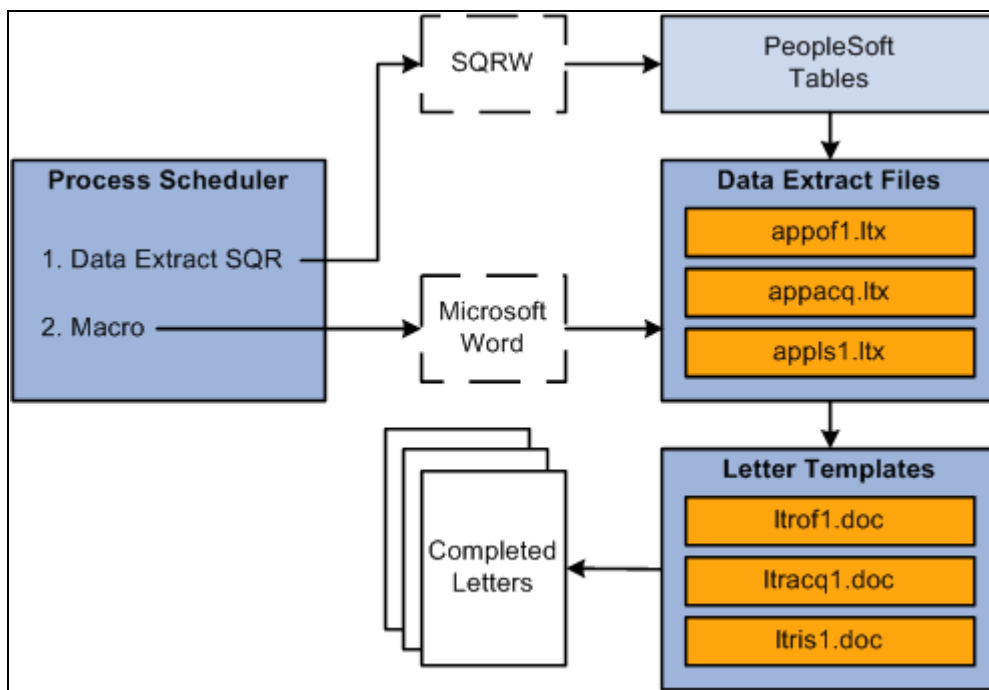
The system creates the form letters in a temporary directory on the application server, putting all letters of the same type in one file.

The distributed architecture of your PeopleSoft HRMS system means that your application server can be located far from your machine, so the system doesn't print letters to a default printer. Instead, you select where you want to print the letters by using standard Microsoft Word print options.

Generating Form Letters with PeopleSoft Process Scheduler

PeopleSoft Process Scheduler uses Microsoft Word to run the macros that merge the data extract files into form letter templates and prints the letters. You can run a job that performs each step in sequence or you can manually run each process in turn. If you manually run each process, you must perform the steps sequentially (first the SQR and then its corresponding macro) because PeopleSoft Process Scheduler can't call up the report writer and the word processor simultaneously. Also, the data extract file that is created by the SQR must exist before the Word macro starts.

This diagram and the steps below illustrate how PeopleSoft Process Scheduler generates form letters for other PeopleSoft HRMS applications:



Generating form letters for other PeopleSoft HRMS applications with PeopleSoft Process Scheduler

PeopleSoft Process Scheduler follows these steps to generate form letters for other PeopleSoft HRMS applications:

1. SQR PAWRL01:
 - a. Scans the personal data record of each employee.
 - b. Retrieves the information from the record.
 - c. Creates data extract files `pastdext.dat` in the TEMP directory that is defined in the macro.
2. The macro PAWRL01:
 - a. Opens the form letter templates that correspond to the data extract files.
 - b. Merges the appropriate extract file data into the template `rollover.doc`.
 - c. Inserts the data from `pastdext.dat` into the template field codes.

Using Naming Conventions in Form Letter Files

Microsoft Word assigns the extension `.doc` to all documents. No other naming convention is required for these types of letters.

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file.

Depending on your configuration, you may need to make these changes to the standard Microsoft Word macros that are supplied by PeopleSoft:

- Default path to the `empty.doc` file that contains all the macros.
- Location of the letters produced.

The macros create letters in the directory `C:\TEMP` on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Microsoft Word, you print them to your local printers.

To set up the system to print form letters:

1. Set up a shared directory on your machine for the letters.

This enables the application server to add the letters to the directory. For example, if you're the training administrator, you may share the `C:\TEMP` directory on your machine as `TRNTEMP`.

For the multilingual letters, set up subdirectories for each language in which you run the letters. For example, if you run letters with the Language field set to *English*, you create the directory `C:\TEMP\ENG`. See your system administrator if you don't know how to set up shared directories.

2. Update the macros with the location of your empty.doc file and the location of your shared directory.

In that macro, you replace this line:

```
WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDTEXT.DAT", "C:\HR800=>
\WINWORD", "ROLLOVER.DOC", ""
```

With this line:

```
WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDTEXT.DAT", "C:\<path>=>
\WINWORD", "ROLLOVER.DOC", "\\<machine_name>\TRNTEMP"
```

Where:

<path> is the path to the directory that contains empty.doc.

<machine_name> is the machine name that is assigned to your computer.

3. Define the WINWORD variable in the process scheduler configuration file.

WINWORD defines the location of the Microsoft Word executable file that the process scheduler runs to produce the form letters. For example, if Microsoft Word is run on the application server, you might have this line in the process scheduler configuration file:

```
WINWORD=C:\APPS\OFFICE97\OFFICE
```

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Adapting Form Letters

This section discusses how to:

- Modify the Word macros for the sample letters.
- Modify the text in sample letter templates.
- Add fields to sample letters.
- Create new form letters.

Modifying the Word Macros for the Sample Letters

You specify several environment variables in each Microsoft Word macro so that it can find the Word templates and data extract files during the form letter process. For example, your network or workstation configuration may have some of the files in different locations than those specified in the macros, so you need to modify the PATH to reflect the correct locations.

Before you edit the existing macros (or create new ones), we recommend that you print copies of the Microsoft Word documents and macros and the report writer SQRs and study them carefully.

Note. To make this change, you should be familiar with Microsoft Word templates and macros and with your report writer.

All of the macros are attached to a file in the \PS\WINWORD directory. (Your path may differ, depending on your installation, but you can always find the file in a WINWORD subdirectory.) They are attached to an empty Microsoft Word file called empty.doc.

To modify a macro:

1. In Microsoft Word, open the empty.doc file.
2. Select Tools, Macro.
3. In the Macros in field, select *Stdltr* (template).
4. Highlight the macro that you want to modify and click Edit.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft HRMS contain sample text for different types of tasks, which you can change to suit your needs. For example, you'll probably want to change the sender names in the letters to the names of the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, use the following procedure.

To modify the text in a form letter:

1. Find the Word letter template to update.

Templates are located in the directory \PS\WINWORD.

2. In Microsoft Word, open the document that you want to modify.

If you see " " in the document, select Tools, Options; then select the Field codes check box.

3. Make changes to the text as you would in any other document, and save the file.

Warning! Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that are extracted from PeopleSoft Human Resources.

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft HRMS.

Note. To make this change, you should be familiar with Microsoft Word fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.

2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all of the fields that you want to use and writes them to the appropriate data extract files.

For example, to include currencies in the notification letter rollover.doc, add a Currency field code to the form letter template. Also add a variable for currency in pastdext.sqr so that the SQR retrieves the currency value and writes it to the data extract file.

Here's what the data extract file looks like before the change:

```
LANG, NAME, PLAN, ADDR1, ADDR2, ADDR3, NATIONAL_ID, CURDATE
USA", "Mr. John Matson", "BEN01", . . . , "May 15, 1993"
```

Here's what it looks like after the change:

```
LANG, NAME, PLAN, ADDR1, ADDR2, ADDR3, NATIONAL_ID, CURDATE, Currency
USA", "Mr. John Matson", "BEN01", . . . , "May 15, 1993", "US Dollars"
```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to send out form letters about their benefit plans to be signed by employees.

To create a new form letter:

1. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.
2. Create the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.
3. Create a new macro that is able to read the extracted data and merge it with the Word letter template.

You might find it easier to copy an existing macro and adapt it.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see the references below.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Microsoft Word Legal User's Guide

Reviewing Sample Form Letters

This section presents three PeopleSoft HRMS sample form letters:

- Training Letter Sample — A confirmation of enrollment letter that is used in training (PeopleSoft Human Resources Administer Training business process).
- Pension Form Sample — A Direct Rollover Election Form that the employee must complete for pension (PeopleSoft Enterprise Pension Administration).

Training Letter Sample

August 10, 2009

Barry Robert Campbell 4928 Wildwood Place Toronto, ON

Dear Barry:

I am pleased to confirm your enrollment in training course K018 titled PeopleTools 1 beginning 09/11/2009 and ending 09/15/2009. Course hours are 9:00 AM to 6:00 PM daily, unless otherwise advised. The course will commence at: Corporation Headquarters Bldg 2000 Floor 2 Room Training Room 2

500 George Washington Pkway

New York, NY

Directions:

From the Airport, take the shuttle bus to George Washington Parkway.

Sincerely,

Barbara Smith Training Coordinator

Pension Form Sample

DIRECT ROLLOVER ELECTION FORM «PLAN» (Sample Form)

«NAME»

Date: «CURDATE»

«ADDR1»

«ADDR2»

Social Security No: «NATIONAL_ID»

«ADDR3»

I. Distribution Information:

Amount of distribution: _____ (If distribution is for the entire account balance enter "account balance")

II. Information About Plan or IRA to Receive Direct Rollover:

Name of Plan: _____

Name of Plan Administrator: _____

Address of Plan: _____

OR

Name of Plan Trustee or Custodian of IRA : _____

Address of Plan Trustee or Custodian: _____

Account Number of IRA: _____

Check which Applies to the Plan to Receive Your Rollover:

☐ The plan is a qualified plan under Internal Revenue Code Section 401(a).

☐ The plan accepts direct rollover contributions.

☐ The plan accepts noncash contributions (optional).

I hereby certify that the information I have entered on this form is true, correct, and complete.

Date _____

Signature of Participant

Chapter 32

(USF) Setting Up the Work-in-Progress Management System

PeopleSoft Enterprise Human Resources provides a work-in-progress (WIP) management system that works together with Workflow to automate the tracking and processing of personnel action requests (PAR) and Federal eApps for Self Service.

This chapter provides an overview of the work-in-progress (WIP) management system setup and discusses how to:

- Set up WIP status.
- Define WIP activity processing.

Understanding WIP Management System Setup

This section discusses:

- Delivered setup.
- Configuration steps.

Delivered Setup

Human Resources delivers definitions for the *USFED* WIP management transaction for personnel action requests (PAR) and definitions for these self service transactions:

- Employee self-service transactions:
 - Address Change (FE_ADDRESS)
 - Marital Status Change (FE_MARITAL)
 - Name Change (FE_NAME)

- Manager Self Service transactions:
 - Full-Time / Part-time Status (FE_FTPT)
 - Location Change (FE_LOCATION)
 - Reporting Change (FE_REPORTING)
 - Promotion (FE_PROMOTION)
 - Reassignment (FE_REASSIGN)
 - Retirement (FE_RETIRE)
 - Separation (FE_SEPARATE)

WIP set up tables are delivered as system data. You can modify the delivered setup to suit your agency's WIP processing needs. Setting up WIP control parameters is usually a one-time-only process that you do when you first configure your PeopleSoft Human Resources system. The setup information in this chapter is for your agency's system administrator who will perform the setup and is not for managers or system users.

Note. All discussions assume that you understand the processes that are being described.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "(USF) Administering Personnel Action Requests"

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "(USF) Processing Personnel Action Requests"

PeopleSoft Enterprise eProfile 9.1 PeopleBook, "(USF) Setting Up Approvals"

PeopleSoft Enterprise eProfile Manager Desktop 9.1 PeopleBook, "(USF) Managing Direct Reports"

Configuration Steps

These are the WIP system configuration steps:

1. Plan and design your WIP process.
2. Set up WIP status codes and associate them with status types and batch processes for reporting.
3. Set up WIP activities and component processing.

Designing Your Agency's WIP Process

Follow these steps to plan your WIP process setup:

1. Review the delivered sample USFED WIP system parameters as an example of WIP setup.

See [Chapter 32, "\(USF\) Setting Up the Work-in-Progress Management System," Understanding Delivered Sample WIP System Parameters, page 809.](#)

2. Analyze your agency's review process and determine the levels of review that you need for PARs and recruiting processes.
3. Design your system based on your agency's requirements for routing requests and other data through approval processes.

Use the charts of sample parameters presented in this chapter as a starting point. You can use the charts as is, change them, or use them as templates to set up your own charts in similar formats.

Defining WIP Status Codes and Associating Status Types

To configure your WIP status controls:

- On the Transaction Setup page, define the WIP status codes that you want to use.

Defining WIP status codes classifies the WIP process into steps. You use those steps to define routing and tracking in PeopleSoft Workflow.

The WIP status code tells PeopleSoft Workflow when and where to send data to the next step of the request/approval cycle or other type of cycle. When reviewers change the WIP status of a request, the PeopleSoft Workflow process that you link to a status ensures that the action goes through all of your agency's review levels and keeps it going until it is completed as an actual event.

- Associate a status type with the status code.

The status type tracks the requests and tells related processes when to add data rows.

- On the Batch Programs page, specify the WIP status and type for related processes.

During processing, the identified process creates a new database row for the specified status type and enters the associated WIP status.

Setting Up Activities and Component Processing

In the Approval Flow component, associate components with WIP activities and further specify the WIP status processing, workflow routing, and other component-level processing controls for each WIP activity.

See Also

[Appendix C, "Delivered Workflows for PeopleSoft HRMS," page 1023](#)

Understanding Delivered Sample WIP System Parameters

The tables in this section contain the delivered USFED sample system WIP parameters for the PeopleSoft Human Resources Administer Workforce business process.

This section discusses:

- Sample WIP status codes.
- Sample WIP status types and related status codes.

- Sample WIP parameters setup.

Sample WIP Status Codes

The USFED sample system is set up to display the WIP status code as the PAR status when entered on system pages.

This table lists and describes the WIP status codes and the users who assign them in the sample system.

<i>WIP/PAR Status Code</i>	<i>WIP/PAR Status Description</i>	<i>Who Can Assign This Status</i>
INI	Initiated	Employee, Supervisor, Human Resources
REQ	Requested	Employee, Supervisor, Human Resources
1ST	1st Authorized	1st Level Reviewer: Supervisor or Manager
2ND	2nd Authorized	1st Level Reviewer: Supervisor or Manager
SIG	Approved/Signed	2nd Level Reviewer: Supervisor or Manager
APP	Approved	Human Resources
AUT	Authorized	1st Level Reviewer: Supervisor or Manager
REV	Reviewed	2nd Level Reviewer: Supervisor or Manager
PRO	Processed by Human Resources	Human Resources
RET	Return for More Information	Supervisor, Manager, Human Resources
WTH	Withdrawn	Employee or Supervisor requesting the action

WIP/PAR Status Code	WIP/PAR Status Description	Who Can Assign This Status
DIS	Disapproved	Supervisor, Manager, Human Resources
COR	Corrected	Human Resources
CAN	Canceled	Human Resources
IRR	IRR Reported (individual retirement record reported)	Human Resources

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "(USF) Administering Personnel Action Requests," Adding and Updating Data

Sample WIP Status Types and Related Status Codes

This table describes how the WIP status types are linked to the various WIP statuses in the sample USFED system:

Status Type	WIP Status Code
Work-in-progress	INI (initiated)
Work-in-progress	REQ (requested)
Work-in-progress	1ST (first authorization)
Work-in-progress	2ND (second authorization)
Work-in-progress	APP (approved)
Work-in-progress	AUT (authorized)
Work-in-progress	REV (reviewed)
Work-in-progress	SIG (approved/signed)

Status Type	WIP Status Code
Work-in-progress	RET (returned for more information)
Work-in-progress	WTH (withdrawn)
Work-in-progress	DIS (disapproved)
Corrected	COR (corrected)
Canceled	CAN (canceled)
Completed	PRO (processed by Human Resources)
IRR Reported (individual retirement record reported)	IRR (IRR reported)

Sample WIP Parameters Setup

This table describes how the sample WIP parameters are set up in the Approval Flow component for USFED to drive Federal PAR component processing:

WIP Activity	Description	Allow Row Delete/Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Activate
1st AUTH	1st Authorization		1ST	EE_1ST_AUTH	1ST, REQ	1ST, Request - Both Status Field Only
2nd AUTH	2nd Authorization		2ND	EE_2ND_AUTH	1ST, 2ND	1ST, 2ND - Both Status Field Only
APP/SGN	Approval/Signature			EE_APPROVAL	2ND, SIG	2ND - Status Field Only; SIG
APPL HIRE	Applicant Hire		PRO	EE_APPLICANT_HIRE	PRO	PRO, INI

WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Activate
CANCEL	Cancellation			EE_CANCELLATION	CAN,PRO	COR,PRO - Both Status Field Only
CONC_HIR	Concurrent Hire		PRO	EE_CONC_HIRE		PRO, INI
CORRECTION	Correction	Insert, Delete	COR	EE_CORRECTION	COR, PRO	COR, PRO
EMPL REQST	Employee Request	Insert	REQ	EE_EMPL_REQ	1ST, 2ND, COR, DIS, PRO, INI, REQ, RET, SIG	INI, REQ
HIRE	Hire		PRO	EE_HIRE		PRO, INI, REQ
HR PROC	Process by HR	Insert, Delete	PRO	EE_HR_PROC	1ST, 2ND, CAN, COR, DIS, PRO, REQ, RET, SIG, WTH	1ST, 2ND, CAN, COR, DIS, PRO, INI, REQ, RET, SIG, WTH
IRR CORR	Correction IRR	Insert	PRO	EE_IRR_CORR	IRR	PRO
IRR SUPP	Supplemental IRR	Insert	PRO	EE_IRR_SUPP	IRR	PRO
LEAVE REQ	Request Leave Without Pay		REQ	FG_EE_LEAVE_REQ		REQ
SUP REQST	Supervisor Request	Insert	REQ	EE_SUP_REQ	PRO, INI, REQ	INI, REQ
TERMINATN	Termination Request	Insert	REQ	FG_EE_TERMINATION		REQ

WIP Activity	Description	Allow Row Delete/Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Activate
W3_PERS_DT	Web Personal Data		PRO	W3_GVT_PERS_DATA	PRO	PRO, REQ

Setting Up WIP Status

To set up WIP status, use the Approval Transactions component (GVT_WIP_RECORD).

This section discusses how to:

- Define WIP statuses and associate status types.
- Specify WIP status and type for related batch processes.

Understanding WIP Status Codes and Status Types

After you review the sample setup, analyze the request process, and determine the process that your agency will use, define your WIP statuses and link each one to a status type.

You can use all or some of the statuses that are delivered with the system, and you can use some of them more than once in a process. For example, your agency might require two levels of authorization and two levels of approval for processing a PAR. Or, as shown in the sample system, you might want two levels of authorization and one level of approval.

Assign the appropriate WIP status type to each status. As a PAR travels along the path of approvals, it retains the status type *Work-in-progress* until it is approved, at which time the status type would be *Completed*.

This table lists the available WIP status types with definitions indicating when you would use each:

WIP Status Type	Definition
Work-in-progress	The request hasn't reached the final level of approval. The personnel action information resides only in the Federal PAR component and is not applied (pushed) to core records and components.
Completed	A request has successfully completed all review levels and is approved by HR. The personnel action will be applied (pushed) to core records and components.
Canceled	A completed request is canceled by HR. The personnel action will be retained on the Federal PAR components, but is deleted from core records and components.

<i>WIP Status Type</i>	<i>Definition</i>
Corrected	A completed request is corrected by HR. The personnel action will be retained on the Federal PAR components, but is updated on core records and components.
IRR Reported	The request will be reported on an Individual Retirement Record (IRR).

See Also

Chapter 32, "(USF) Setting Up the Work-in-Progress Management System," Sample WIP Status Codes, page 810

Chapter 32, "(USF) Setting Up the Work-in-Progress Management System," Sample WIP Status Types and Related Status Codes, page 811

Chapter 32, "(USF) Setting Up the Work-in-Progress Management System," Defining WIP Status Codes and Associating Status Types, page 809

Pages Used to Set Up WIP Status

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transaction Setup	GVT_WIP_RECORD1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup Select <i>USFED</i> as the Transaction value in the search page. Select any other value starting with <i>FE_</i> for Federal eApps for Self Service transactions.	Define WIP statuses and associate status types for the USFED or Federal eApps transactions.
Batch Programs	GVT_WIP_RECORD2	Set Up HRMS, Product Related, Workforce Data USF, Approval Transactions, Batch Programs Select <i>USFED</i> as the Transaction value in the search page.	Specify WIP status and type for related batch processes. Note. This page appears only for the USFED transaction.

Defining WIP Statuses and Associating Status Types

Access the Transaction Setup page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup where you've selected *USFED* as the Transaction value in the search page).

Transaction Setup

Batch Programs

Transaction:

USFED

*Description:

Federal WIP Transactions

*Short Description:

Federal WI

WIP Status Label:

Par Status:

☐ Avail to Manager Self-Service

☒ Effective Dated Record

Valid WIP Statuses

Find | View All | First 1 of 15 Last

*WIP Status:

1ST

*Description:

1st Authorized

*Short Description:

1st Auth

☐ Allow Row Insert

Status Type

☒ Work-in-progress

☐ Completed

☐ Cancelled

☐ Corrected

☐ IRR Reported

Personnel Action Processing

SF-52 Print Area:

Part A - Box 6: Authorized By

☐ Allow SF-50 Print

Transaction Setup page

Because the WIP setup is delivered with your system, we describe the page controls that appear on this page as they apply to our sample database. You can change the values in the *USFED* transaction to correspond to the setup that you require for your agency.

- WIP Status Label

Enter a WIP status label. This label is for referencing the WIP status on various human resources pages. For example, for referencing the WIP status on the Administer Workforce request pages, the label in our sample system is *Par Status* (personnel action request status).
- Avail to Manager Self-Service(available to manager self-service)

Select this option only when setting up approvals for self-service transactions.
- Effective Dated Record

Select if the record is to be effective-dated. This must be selected for the *USFED* transaction.

Valid WIP Statuses

WIP Status (work-in-progress status)	Add or modify the three-character status codes as necessary. Each WIP status represents a step in the approval process.
Description and Short Description	The system displays the description or short description on HRMS pages when you select the three-character PAR Status that corresponds to the WIP status.
Allow Row Insert	Select this option if you want users to be allowed to insert a new row from a personnel transaction with the selected status. For example, the Data Control page in Administer Workforce enables users to enter new effective-dated rows and add new data, creating a history of the changes. These types of pages are part of the WIP processing pages and depend on the WIP control configuration to designate the WIP status in which a user can enter a new row.
Status Type	Select the status type to be linked to the WIP status. Valid status types are: • Work-in-progress. • Completed. • Canceled. • Corrected. • IRR Reported (individual retirement record reported). These status codes are defined in the overview to this section. See Chapter 32, "(USF) Setting Up the Work-in-Progress Management System," Understanding WIP Status Codes and Status Types, page 814.

Personnel Action Processing

In this group box, enter details related to printing forms from a page with the selected status.

SF-52 Print Area	Select the area where the name is to appear on the actual form; for example, <i>Part A - Box 6: Authorized By</i> .
Allow SF-50 Print	Select if you want the SF-50 button to be enabled. This allows the SF50 form to be printed for a personnel transaction with this status.

Reviewing all Data Rows

Continue reviewing and modifying data in the delivered data rows on the page. Add additional data rows if required.

Specifying Batch Process Insertion Parameters

Access the Batch Programs page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Batch Programs where you've selected *USFED* as the Transaction value in the search page).

The screenshot shows the 'Batch Programs' page with a tabbed interface. The 'Transaction Setup' tab is active, and the 'WIP Record' is set to 'USFED'. Below this is a table titled 'WIP Record Program Information' with 4 rows. Each row contains fields for '*Program:', '*WIP Status:', and '*Status Type:'. The first two rows have a status type of 'Completed', and the last two have a status type of 'WIP'. The first two rows also have a 'WIP Status' of 'PRO' (Processed by Human Resources), and the last two have a 'WIP Status' of 'SIG' (Approved / Signed). The table has a 'Find' button and a 'View All' button. The table is paginated, showing '1-4 of 7' records.

WIP Record Program Information		
*Program:	FGHR002B	*Status Type: Completed
*WIP Status:	PRO	Processed by Human Resources
*Program:	FGHR002B	*Status Type: WIP
*WIP Status:	SIG	Approved / Signed
*Program:	FGHR004B	*Status Type: Completed
*WIP Status:	PRO	Processed by Human Resources
*Program:	FGHR004B	*Status Type: WIP
*WIP Status:	SIG	Approved / Signed

Batch Programs page

Program

Enter the name of the SQR, COBOL, or Application Engine process that inserts a new row. The row that the system inserts is the highest effective-dated row with the status type that is specified in the *Status Type* field on this page.

Add rows as necessary to add programs.

Status Type

Specify the status type for which a new row is to be inserted by the program. Options are as follows:

- *Completed*: The system searches for both *Completed* and *Corrected*.
- *WIP*: The system searches for *Work-in-progress*, *Completed*, and *Corrected*.

WIP Status

Select the WIP status to be inserted on the new row.

Example

For example, based on the exhibit above, the *FGHR002B* process inserts the highest effective-dated row with the status type *Completed* and displays *PRO* (*Processed by Human Resources*) in the WIP Status field.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "(USF) Processing Automatic Actions for Probation, Tenure, and WGs"

Defining WIP Activity Processing

To define WIP activity processing, use the Approval Flow component (GVT_WIP_ACTVTY).

This section discusses how to:

- Associate WIP activities with components.
- Set default action and reason for components.
- Specify valid WIP status values and workflow routing.
- Specify data entry availability.
- Define WIP statuses for approval steps for federal self-service transactions.

Pages Used to Define WIP Activity Processes

Page Name	Definition Name	Navigation	Usage
WIP Activity 1	GVT_WIP_ACTVTY1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 1 Select <i>USFED</i> as the Transaction value in the search page.	Associate WIP activities with the components in which the action can be processed and specify other processing controls.
Component Defaults page	GVT_WIP_PGRP_SEC	Click the Component Defaults button on the WIP Activity 1 page for the <i>USFED</i> transaction.	Select component defaults for action, reason, NOA, and legal authority.
WIP Activity 2	GVT_WIP_ACTVTY2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 2 Select <i>USFED</i> as the Transaction value in the search page.	Specify valid WIP status values, workflow routing, and PAR tracking for each combination of WIP activity and component.

Page Name	Definition Name	Navigation	Usage
WIP Activity 3	GVT_WIP_ACTVTY3	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 3 Select <i>USFED</i> as the Transaction value in the search page.	Specify data entry availability for each combination of WIP activity and component.
Define Steps	GVT_WIP_ACTVTY4	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, Define Steps Select a transaction beginning with <i>FE</i> as the Transaction value in the search page.	Associate WIP statuses with steps in the approval process for federal self-service transactions. Note. You cannot associate WIP statuses with approval steps for federal self-service transactions until your approval process has been defined. Use the Approval Workflow Engine (AWE) to define the approval process.

Associating WIP Activities with Components

Access the WIP Activity 1 page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 1 where you've selected *USFED* as the Transaction value in the search page).

Transaction: USFED Federal WIP Transactions

WIP Activity Information Find | View All First 1 of 15 Last

*WIP Activity: 1ST AUTH WIP Status: 1ST 1st Auth + -

*Description: 1st Authorization ☐ Allow Row Insert? ☐ Allow Row Delete?

*Short Description: 1st Auth Insert Status: COM/COR

WIP Status in Search Find | View All First 1-2 of 2 Last

1ST	1st Authorized	+ -
REQ	Requested	+ -

Components Performing Action Find | View All First 1 of 1 Last

EE_1ST_AUTH ☐ Self Service ☒ All Job Actions Valid? Component Defaults + -

WIP Activity 1 page

WIP Activity Information

- WIP Activity** Enter the activity for which you are defining controls.
- WIP Status** Select the default WIP status that appears on the respective component's Data Control page when you insert a new effective-dated transaction row, or when you are in Add mode.
- Allow Row Insert?** For effective-dated records only. Select to permit users to insert rows using this WIP activity.
- Allow Row Delete?** For effective-dated records only. Select to permit users to delete rows using this WIP activity.
- Insert Status** Specify the status types from which row insert is permitted.

WIP Status in Search

Select the WIP status codes to include in search records. The search records for the components that are linked to this activity retrieve only employees with rows that contain a WIP status that matches what is in this table.

Components Performing Action

Select the components that the WIP activity uses to perform the actions. An activity (for example, a request) can have more than one component associated with it. For example, the components for Employee Request (EE_EMPL_REQ) and Supervisor Request (EE_SUP_REQ) are request-like activities and can be included under the Request activity.

- Self Service**

Select if the component is a self-service component. When this option is selected, the component automatically inserts a row when it is initialized. This is like adding a new row.
- All Job Actions Valid?**

Select if all job actions are valid for this component.
- Component Defaults**

Click this button to access the Component Defaults page, where you enter the valid job action, reason, NOA code, and legal authorities.

Set Default Action and Reason for Components

Access the Component Defaults page (click the Component Defaults button on the WIP Activity 1 page).

Component Defaults

Action:	Posn Chg	Position Change
Reason Code:	JSH	Job Sharing
Nature of Action Code:	721	Reassignment
Legal Authority (1):	P5M	Reg 352.507. Reempl under
Legal Authority (2):		

Components Defaults page

Select the values that the system enters by default in the component for this WIP activity.

Specify Valid WIP Status Values and Workflow Routing

Access the WIP Activity 2 page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 2 where you've selected *USFED* as the Transaction value in the search page).

WIP Activity 1WIP Activity 2WIP Activity 3

Transaction: USFEDFederal WIP Transactions

WIP Activity InformationFind | View AllFirst1 of 15Last

WIP Activity: 1ST AUTH1st Authorization+ -

Components Performing ActionFind | View AllFirst1 of 1Last

Component Name: EE_1ST_AUTH+ -

Available WIP Status to ChangeView AllFirst1 of 3Last

1ST1st Authorized+ -

Bus Proc: Administer PARs

Activity: 1st Authorization

Event Name: Route to 2nd Authorization

☒ Prompt for Route to Next?Using: GVT_POI_RT_VW

Routing Text: Route for POI Signature

WIP Status in PAR TrackingView AllFirst1 of 1Last

Default Sequence *WIP Status

☐☐☐ Required☒ Preload

WIP Activity 2 page

Components Performing Action

This scroll area contains a row for each component listed for the WIP activity on the WIP Activity 1 page.

Available WIP Status to Change

The statuses that you specify in this group box are the only statuses available for selection in the WIP Status field on the PAR (personnel action request) pages in the component.

- Bus Proc** (business process), **Activity**, and **Event Name**

The Bus Proc, Activity, and Event Name fields are signals for PeopleSoft Workflow. These entries govern the routing of the action through the various PeopleSoft Human Resources business processes.

To modify the routings, you create a new business process activity and event in PeopleSoft Application Designer. On this page, you insert the name of the new process and define its routing. The system retrieves the name of the process from this table and triggers that event when the user saves the activity with the WIP status that you have designated.
- Prompt for Route to Next?**

Select to specify the routing prompt list views that are to be used on the prompt page.

When you select this option, the Using and Routing Text fields appear, where you enter the parameters for the routing process.
- Using**

A prompt page appears when the user saves the component if you have set up the activity with Prompt for Route to Next? selected for the component. On the prompt page, the user selects from the list of employees who are in the result set of the view that you select in the Using field on the WIP Activity 2 page. The user selects an employee from the results set to whom to route the request for the next level of approval.

Routing Text.

Specify the verbiage your users will see when prompted with the option of routing this personnel action.

WIP Status in PAR Tracking

- Default Sequence**
- Select the default sequence of a WIP status in PAR tracking.
- WIP Status**
- Select the WIP status for the sequence you are defining.
- Required**
- Select if the sequence is required.
- Preload**
- Preload is the default sequence.

Specify Data Entry Availability

Access the WIP Activity 3 page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, WIP Activity 3 where you've selected *USFED* as the Transaction value in the search page).

WIP Activity 1WIP Activity 2WIP Activity 3

WIP Record: USFEDFederal WIP Transactions

WIP Activity InformationFind | View AllFirst1 of 15Last

WIP Activity: 1ST AUTH1st Authorization+ -

Components Performing ActionFind | View AllFirst2 of 2Last

Component Name:

Action ReasonFind | View AllFirst1 of 1Last

*ActionReason Code+ -

HireNPS

WIP Status to UngrayFind | View AllFirst1 of 1Last

*WIP Status+ -

☐ Status Field Only?

WIP Activity 3 page

Action Reason

The Action Reason group box appears only if the All Job Actions Valid? option is deselected on the WIP Activity 1 page for the combination of activity and component. The Action and Reason Code values you select here control what values are available from the Action/Action Reason prompts when administering the PAR using the component and activity.

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Action	Enter the action for the selected activity and component.
Reason Code	Select a valid reason code for the selected activity and component. Only reason codes appropriate to the selected action are available.

WIP Status to Ungray

All fields on the page are unavailable for data entry if the WIP status is not one of the values selected here for the activity the user is in.

WIP Status	Select the WIP statuses that enable data input in the component.
Status Field Only?	Select if only the status field is available for entry. Use this option when a reviewer is allowed to change the WIP status but is not allowed to change the underlying data in the action.

Defining WIP Statuses for Approval Steps for Federal Self-Service Transactions

Access the Define Steps page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow, Define Steps for transactions beginning with *FE* as the Transaction value in the search page).

The screenshot displays the 'Define Steps' page for the transaction 'FE_MARITAL' (Marital Status Change). It shows the 'Approval Process Steps' section with a table of steps. The first step is selected, showing details: Step Number 1, Step Name REQUEST, Description Request, and Short Description Request. Below this is the 'Actions For Step' section, which shows a table of actions. The first action is selected, showing details: On Action Of Request, Set Status To REQ, and Requested.

Define Steps page

When you search for transactions that begin with FE, the system accesses the Define Steps page rather than the WIP Activity pages for approval setup. The *PeopleSoft Enterprise eProfile PeopleBook* documents this page in detail.

See Also

PeopleSoft Enterprise eProfile 9.1 PeopleBook, "(USF) Setting Up Approvals," Associating WIP Statuses With Approval Steps and Actions.

PeopleSoft Enterprise eProfile Manager Desktop 9.1 PeopleBook, "(USF) Managing Direct Reports"

Chapter 33

Setting Up PeopleSoft HelpDesk for HR – 360° View

This chapter provides an overview of PeopleSoft Enterprise HelpDesk for HR and discusses how to:

- Extract and display HRMS information.
- Set up security for PeopleSoft HelpDesk for HR.
- Set up direct reports for PeopleSoft HelpDesk for HR.

Understanding PeopleSoft HelpDesk for HR

PeopleSoft HelpDesk for HR – 360° View provides a complete view of a person's HRMS data. This PeopleSoft Enterprise CRM application is set up and operated from CRM but extracts and displays data stored in PeopleSoft HRMS.

As part of the PeopleSoft HelpDesk for HR setup, you must:

- Set up HRMS security giving HelpDesk agents access to the data of the people they will be serving.
- Set up the direct report structure for the managers in your organization.

See Also

PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components

Extracting and Displaying PeopleSoft HRMS Information

PeopleSoft HelpDesk for HR extracts and displays the following information from PeopleSoft HRMS:

- Personal
- Job
- Position summary
- Payroll summary

- Benefits summary
- Dependent and benefits
- Direct reports

You cannot modify the information from the HelpDesk pages.

Setting Up Security for PeopleSoft HelpDesk for HR

Data permission security for PeopleSoft HelpDesk for HR works the same way as it does for all of HRMS. The HelpDesk agents using PeopleSoft HelpDesk for HR must have access to data in order to view it on the 360 Degree View page.

Agent Levels and Permissions

There are three levels of HR HelpDesk Agents in the CRM database – Level 1, Level 2 and Level 3. Level 1 and Level 2 Agents cannot access certain HRMS pages through the Action Links. Besides, the Level 1 Agent can only view the HRMS pages but cannot make changes. The following table shows the pages that each agent can access in HRMS database.

<i>Action Links</i>	<i>Level 1 Agent</i>	<i>Level 2 Agent</i>	<i>Level 3 Agent</i>
HRMS – Personal Information	No	Yes	Yes
HRMS – Emergency Contact	Yes	Yes	Yes
HRMS – Job Summary	Yes	Yes	Yes
HRMS – Job Data Information	Yes	Yes	Yes
Benefits – Benefits Summary	Yes	Yes	Yes
Benefits – Dependent Benefits	No	Yes	Yes
Benefits – Disability Plans	Yes	Yes	Yes
Benefits – Enroll In Benefits	No	Yes	Yes
Benefits – FSA Plans	Yes	Yes	Yes
Benefits – Health Plans	Yes	Yes	Yes
Benefits – Leave Plans	Yes	Yes	Yes
Benefits – Life/ADD Plans	Yes	Yes	Yes

Action Links	Level 1 Agent	Level 2 Agent	Level 3 Agent
Benefits – Pension Plans	Yes	Yes	Yes
Benefits – Retirement Plans	Yes	Yes	Yes
Benefits – Savings Plans	Yes	Yes	Yes
Benefits – Vacation Plans	Yes	Yes	Yes
Payroll – Direct Deposit – US	No	Yes	Yes
Payroll – Direct Deposit – USF	No	Yes	Yes
Payroll – General Deduct - US	No	No	Yes
Payroll – General Deduct – USF	No	No	Yes
Payroll – Paycheck – US	Yes	Yes	Yes
Payroll – Paycheck – USF	Yes	Yes	Yes
Payroll – Paysheet – US	No	No	Yes
Payroll – Paysheet – USF	No	No	Yes
Payroll – Savings Bond – US	Yes	Yes	Yes
Payroll – Tax Data – US	No	No	Yes
Payroll – Tax Data – USF	No	No	Yes
Stock – Stock Activity	No	Yes	Yes
Stock – Stock Exercise	No	Yes	Yes
Training – Course Enrollment	No	Yes	Yes
Training – Training Summary	Yes	Yes	Yes

See Also

[Chapter 5, "Setting Up and Administering HRMS Security," page 39](#)

Setting Up Direct Reports for PeopleSoft HelpDesk for HR

To set up Direct Reports for PeopleSoft HelpDesk for HR, use the Direct Reports Setup component (SS_LINK_TBL).

PeopleSoft HelpDesk for HR can only retrieve the appropriate reporting structure for a person if you have set up the access type on the Direct Reports Setup page.

Page Used to Set Up Direct Reports for PeopleSoft HelpDesk for HR

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Target Information	SS_LINK_TBL	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Target Information	Set up the access type for the HD_360_COMPONENT.

Setting Up Direct Reports Access Type

To set up the access type:

1. Access the Direct Reports Setup component (Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup) and select the component HD_360_COMPONENT.
2. On the Target Information page choose the Access Type *By Supervisor Id*.
3. Save the page.

Chapter 34

Setting Up and Working with Self-Service Transactions

Self-service transactions serve as extensions of a core PeopleSoft application. They enable workers to update their personal information or to perform some basic task required by their job.

This chapter discusses how to:

- Configure self-service transactions.
- Review transactions.
- (USF) Review federal self-service transactions
- Set up access to direct reports data.
- Use workflow with self-service transactions.

Note. PeopleSoft delivers two different workflow technologies for self-service transactions. Delivered self-service transactions with workflow are preconfigured for either the Approval Framework or the technology described in this chapter.

See Also

Chapter 27, "Setting Up and Working with Approvals," page 659

Configuring Self-Service Transactions

To configure self-service transactions, use the Self Service Workflow Configurations component (WF_CO_CONFIG).

This section provides an overview of rules for self-service transactions and discusses how to:

- Set up approvals and database updates.
- Set up administrator notification rules.
- Set up component interface rules.

Note. If the self-service transaction uses the Approval Framework for approval processing, you must also set up the transaction for use with that engine and its framework.

See [Chapter 27, "Setting Up and Working with Approvals,"](#) page 659.

Understanding Rules for Self-Service Transactions

You can set rules that define whether the transaction:

- Goes through an approval process.
- Updates the database or sends a notice to the administrator to complete the transaction manually.
- Notifies a specific person when problems occur during the processing of the transaction or when a transaction successfully completes.

Which Transactions Can Be Configured

This table lists the configurable transactions and indicates the approval and delegation features that are delivered active for each:

Configurable Transaction Description	Approval Framework Delivered Active	Delegation Initiation Delivered Active	Delegation Approval Delivered Active
Performance Document	Yes (Approval Framework)		Yes (Approval Framework)
Address Change			
Change Full/Part Time Status		Yes	
Change Location		Yes	
Marital Status			
Name Change			
Promotion	Yes (Approval Framework)	Yes (Approval Framework)	Yes (Approval Framework)
Reporting Change	Yes (Approval Framework)		
Retire Employee		Yes	
Ad Hoc Salary Change	Yes		
Terminate Employee		Yes	
Training Enrollment			
Training Enrollment by Manager	Yes		
Transfer	Yes (Approval Framework)	Yes (Approval Framework)	Yes (Approval Framework)

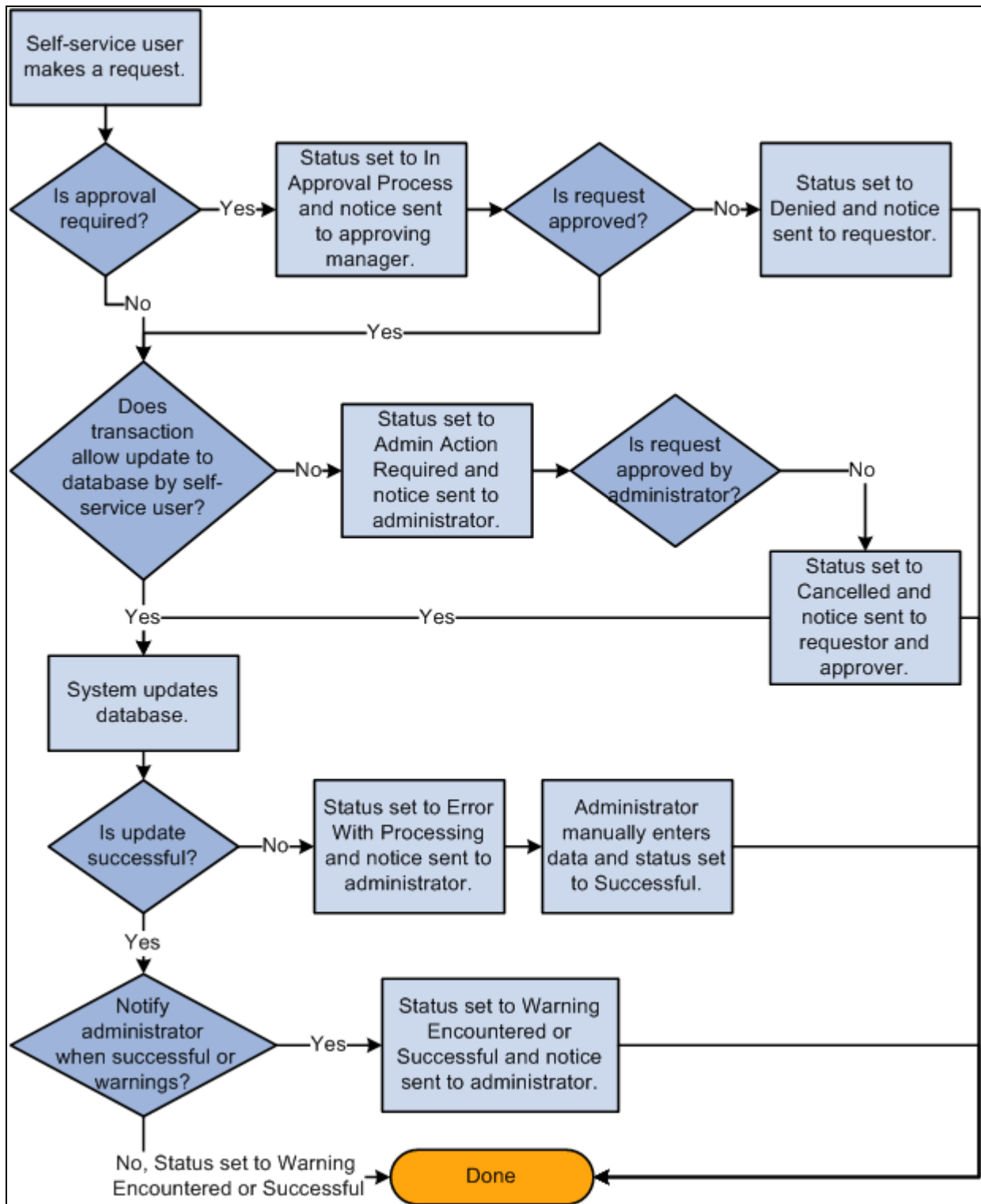
You can change the delegation setting for any transaction on the Workflow Transactions page. For workflow that does not use the Approval Framework, you can enable transactions for delegation initiation, but not for delegation approval.

See [Chapter 28, "Setting Up and Working with Delegation," page 707](#).

Transactions that use the Approval Framework functionality and the delegation functionality require additional configuration. PeopleSoft delivers these transactions preconfigured for using these functionalities.

Overview of the Self-Service Processing

This diagram maps out the process a self-service transaction takes when the transaction is set up to follow the configuration rules:



Process flow for transactions using Process Configuration

Note. If the transaction uses the Approval Framework and an appropriate user is not found, the system automatically routes the transaction to the Approval Framework administrator for review and approval. If an appropriate user is not found for a transaction that does not use Approval Framework for workflow, the system sends an error notification to the administrator who can view the error using the Self-Service Inquiry page. If you enter an alternate user on the General Profile Information page, make sure the User ID entered has permission to access the necessary pages.

Exceptions to the Rules

Some transactions update the worker's job data. These self-service rules cannot override information controlled by Position Management.

<i>Position Management Setting</i>	<i>Worker's Job</i>	<i>Auto-Update of Database</i>
None	Not Applicable	Is allowed.
Partial	In a position	Not allowed. Exception to this rule is when a manager is requesting a reporting change for a worker. If the worker is in a position and an ID was entered in the Supervisor ID field automatic update is allowed. Note. If you select Partial Position Management on the Installation page, the system automatically updates position data if you also select the Position Override check box on the Workforce Administration - Job page. If you select Full Position Management on the Installation page the system automatically updates all position data.
Full	In a position	Not allowed. Exception to this rule is transferring and promoting a worker. This is because managers promote or transfer workers by selecting a new position number, not changing the existing one. So, automatic updates will insert the new position number and update all the related fields; position data is not touched.

See Also

[Chapter 27, "Setting Up and Working with Approvals," page 659](#)

[Chapter 28, "Setting Up and Working with Delegation," page 707](#)

Pages Used to Set Up Rules for Self Service Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workflow Configurations	WF_CO_CONFIG	Set Up HRMS, Common Definitions, Self-Service, Workflow Configurations, Workflow Configurations	Determines whether transaction should follow an approval process, update the database automatically, and identify who handles errors and manual updates to database.
Admin Notification Setup	WF_HR_TRANS_NOT	Click the Notification Setup link on the Workflow Configurations page.	Defines if an administrator should receive email notification when automatic update was successful or there were warning messages issued during the update.
SS Component Interface Setup	SS_TRANS_CIDTL_SEC	Click the Component Interface Setup link on the Workflow Configurations page.	Defines the name of the component interface used by the transaction and location of error and warning messages.

Setting Up Approvals and Database Updates

Access the Workflow Configurations page (Set Up HRMS, Common Definitions, Self-Service, Workflow Configurations, Workflow Configurations).

Workflow Configurations					
Description	Approval Process?	Allow DB Update	*Administrator Role	Notification Setup	Component Interface Setup
Performance Document	☒		Personnel Administrator 	Not Applicable	Not Applicable
Address Change	☐	☒	Personnel Administrator 	Notification Setup	Component Interface Setup
Change Full/PT Status	☐	☐	Personnel Administrator 	Notification Setup	Component Interface Setup
Change Location	☐	☐	Personnel Administrator 	Notification Setup	Component Interface Setup
Marital Status	☐	☐	Personnel Administrator 	Notification Setup	Component Interface Setup
Name Change	☐	☐	Personnel Administrator 	Notification Setup	Component Interface Setup
Promotion	☒	☐	Personnel Administrator 	Notification Setup	Component Interface Setup
Reporting Change	☒	☐	Personnel Administrator 	Notification Setup	Component Interface Setup
Retire Employee	☐	☒	Personnel Administrator 	Notification Setup	Component Interface Setup
Ad Hoc Salary Change	☒	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Terminate Employee	☐	☐	Personnel Administrator 	Notification Setup	Component Interface Setup
Training Enrollment	☐	☐	Training Administrator	Notification Setup	Component Interface Setup
Training Enrollment by Manager	☒	☒	Training Administrator	Notification Setup	Component Interface Setup
Transfer	☒	☐	Personnel Administrator 	Notification Setup	Component Interface Setup

Workflow Configurations page

Note. (USF) This page is not used for U.S. federal self-service transactions, which never update the HR tables directly. Instead, federal transactions go through intermediate Personnel Action Request (PAR) tables, where an HR administrator completes a final approval outside of the standard approval process.

Description

Lists the self-service transaction delivered with the system that is designed to work with the Process Configuration process.

Approval Process?

This check box is only available to those transactions designed to use an approval process. If selected, the system requires Manager level approval. If not selected, manager level approval is not required.

Note. Transactions that use the Approval Framework require additional approval configuration.

See [Chapter 27, "Setting Up and Working with Approvals,"](#) page 659.

Allow DB Update (allow database updates) If selected, this check box allows the transaction to update the database. If not selected, an administrator will be notified of the change and need to complete the process request. Administrators can complete the request on the Workflow Inquiry page or in the Self-Service transaction pages.

Administrator Role Identifies the role of the person who is responsible for reviewing the results of the transaction if errors occur.

If Notify on Success or Notify on Warnings is selected on the Admin Notification Setup page, this role receives notifications when processing is successful or warnings are encountered.

Notification Setup Click this link to access the Admin Notification Setup page.

Component Interface Setup Click this link to access the SS Component Interface Setup page.

See Also

Enterprise PeopleTools PeopleBooks: Security Administration

Setting Up Administrator Notification Rules

Access the Admin Notification Setup page (click the Notification Setup link on the Workflow Configurations page).

Admin Notification Setup

Address Change

Notification Setup					
*Component	Notify on Success	Notify on Warnings	Business Process Name	Activity Name	Event Name
HR_HOME_MAILING	☐	☐	HR_SS_WORK_EVENTS	HR_SS_CI_ADMIN_ORIG	Address Change CI Notify
WF_HOME_MAIL_CHG	☐	☐	HR_SS_WORK_EVENTS	HR_SS_CI_ADMIN_ADMN	Address Change CI Notify

Admin Notification Setup page

Component The name of the transaction.

Notify on Success Applicable only if Allow DB Update is selected on the Workflow Configuration page. Select to have the role selected on the Workflow Configuration page receive an email when automatic updates are successful.

Notify on Warnings Select to have the role selected on the Workflow Configuration page receive an email when warning messages are generated during a successful HR database update.

Business Process Name, This is predefined system data that can be changed if you want to use a different
Activity Name, and business process.
Event Name

Setting Up Component Interface Rules

Access the SS Component Interface Setup page (click the Component Interface Setup link on the Workflow Configurations page).

SS Component Interface Setup

Interface Setup

Sequence Number	*Component Interface Name	*BC Item Logical Name	*Table Name	*Exception Table		
1	CI_PERSONAL_DATA	COLL_ADDRESSES	ADDRESSES	WF_PER_ERR_WRN	+	-

SS Component Interface Setup page

Note. You do not need to modify this page unless you use component interfaces or exception tables that you have created or modified. This is predefined system data that can be changed if you want to use a different component interface.

Reviewing Transactions

This section discusses how to review transaction activity.

Note. Use the Approval Monitor to review transactions that use the Approval Framework.

See Also

[Chapter 27, "Setting Up and Working with Approvals," Administering Approvals, page 694](#)

Page Used to Review Transactions

Page Name	Definition Name	Navigation	Usage
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry, Workflow Inquiry	Administrators review activity for self-service transactions that do not use the Approval Framework.

Reviewing Transaction Activity

Access the Workflow Inquiry page (Workforce Administration, Self Service Transactions, Workflow Inquiry, Workflow Inquiry).

Workflow Inquiry

Required Search Fields

Employee ID or Transaction Name is required.

Empl ID:

Transaction Name:

Reporting Change

Optional Search Fields

Date:

Narrow your search results by choosing one or more of the following statuses:

☐ Error with Processing

☐ Warnings Encountered

☐ In Approval Process

☐ Successful Updates

☐ Administrator Action Required

☐ Denied/Cancelled

Search

Clear All

Reporting Changes

Details

Transaction Data1

Update Information

Status	Name	Empl ID	Empl Record	Effective Date	Transaction Number	Reports To Position Number	Supervisor ID	Go To Job	Update Status
1 Cancelled	Carolina Cardenaz	KUZ102	0	10/01/2002	1		KUZ013	Go To Job	Update Status
2 Cancelled	Hether Hawthorne	KUZ107	0	10/01/2002	1		KUZ013	Go To Job	Update Status

Workflow Inquiry page

- Required Search Fields**

To see the activity for a specific worker enter the ID in the Empl ID field. Make sure to tab out of the field.

To see the transaction activity, select the transaction name in the Transaction Name field.
- Optional Search Field**

To see the activity for transaction that occurred on a specific date, enter the date in the Date field.

To select activity with a specific status, select the check box next to the name of the status. You can select one or more statuses.
- Search**

Click this button to find transactions that match the search criteria. Results display below the Search button.
- Clear All**

Click this button to clear all search criteria or search results on the page and start a new inquiry.
- Search Results**

Information about the transaction appears below the search area. Click the various tabs to display information relevant to the transaction:

- Click the Errors or Warnings links to display error and warning messages.
- Click the Go To link to display the component page relevant to the transaction.
- Click the Update Status link to view or update the status.

(USF) Reviewing Federal Self-Service Transactions

This section provides an overview of federal self-service transactions and discusses how to:

- Review activity for federal self-service transactions.
- Review transaction detail.

Note. The Approval Workflow Engine (AWE) provides its own approval monitor that you can use to review and, if necessary, perform certain administrative actions for approval transactions. The pages described in this section provide additional administrative capabilities, including the option to review transactions that predate the use of AWE processing for federal self-service transactions.

See Also

[Chapter 27, "Setting Up and Working with Approvals," Administering Approvals, page 694](#)

Pages Used to Review Federal Self-Service Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workflow Inquiry (USF)	FE_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry (USF), Workflow Inquiry	(USF) Administrators review activity for self-service transactions that do not use the Approval Framework.
<Transaction Name>	<Various>	Click the View Detail link for a transaction on the Workflow Inquiry (USF) page.	Review detailed transaction information, and take administrative action for certain transactions.

Reviewing Activity for Federal Self-Service Transactions

Access the Workflow Inquiry (USF) page (Workforce Administration, Self Service Transactions, Workflow Inquiry (USF)).

Workflow Inquiry

Search Criteria
Enter search criteria. Remove check boxes for unwanted status. All statuses will be returned if all check boxes are selected.

Transaction Name:

Request Date:

Workflow Status:

☒ Error with Processing
☒ Error with Approval Routing
☒ Warnings Encountered
☒ In SS Approval Process
☒ Denied

☒ Manually Entered into PAR
☒ Automatically Sent to PAR
☒ Administrator Action Required
☒ Cancelled

Employee ID:

Promotions

Details

Transaction Data | Last Update |

	Status	Name	Empl ID	Empl Record	Effective Date	Eff Seq	Job Title	PAR Result	Go To HR Processing	View Detail
1	In Approval Process	Susan Hart	LE0008	0	10/31/2010	1	Planner II	Not Applicable	Go To HR Processing	View Detail
2	Automatically Sent to PAR	Marcy Wilson	LE0012	0	09/01/2004	1	Analyst	In Process	Go To HR Processing	View Detail
3	Denied	Marcus Stevens	LE0013	0	10/01/2004	1	Analyst	Not Applicable	Go To HR Processing	View Detail
4	In Approval Process	Hank Bellows	LE0014	0	10/25/2010	1	Administrative Assistant	Not Applicable	Go To HR Processing	View Detail
5	In Approval Process	Hank Bellows	LE0014	0	10/25/2010	2	Administrative Assistant	Not Applicable	Go To HR Processing	View Detail

Workflow Inquiry (USF) page

Search Criteria

Transaction Name, Request Date, and Employee ID

To see the activity for a specific transaction type, request date, or employee, enter the appropriate search criteria in these fields.

Workflow Status

To get search results, you must select at least one of these check boxes; only transactions with selected statuses are included in your search results.

Error With Processing

An approved AWE transaction encountered an error with the component interface that pushes the transaction data to the U.S. federal PAR tables.

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "(USF) Administering Personnel Action Requests."

Error With Approval Routing

An AWE transaction encountered a routing error. To review and address the error, you must use the AWE approval monitor (the Monitor Approvals page).

Warnings Encountered

The transaction generated warnings.

In SS Approval Process (in self-service approval process)	The transaction is currently awaiting approval.
Denied	Transaction approval was denied.
Manually Entered into PAR	The transaction was approved and an administrator manually entered the transaction into the PAR tables. This occurs for the full-time/part-time change, location change, and reporting change transactions. These transactions cannot be automatically pushed to the PAR system because they are position-controlled: changes are made to the position and then propagated out to the persons in the positions
Automatically sent to PAR	The transaction was approved and the system automatically pushed the data into the PAR tables using a component interface.
Administrator Action Required	A transaction requires an administrator to make a decision in order to continue.
Cancelled	The transaction was cancelled.

Search

Search	Click this button to access a list of self-service approval transactions that meet the specified criteria.

Search Results

Search results are grouped into transaction-specific grids. The grids display basic transaction information such as the employee name and ID and the date of the transaction. The grids also display the following approval processing columns:

Status	Displays the status of the transaction. The statuses are the same as the status check boxes in the Search Criteria group box.

PAR Result

Indicates whether the transaction has been sent to the PAR tables.

- *Not Applicable:* The transaction is still in the approval process and, until it is approved, it cannot be sent to the PAR tables.

This value is used only for transactions that are normally sent to the PAR tables automatically.

- *Not Available:* The transaction cannot be automatically sent to the PAR tables.

This value is used for the three position-based transactions that require a user to manually enter data into the PAR tables: location change, reporting change, and full time/part time change.

- *In Process:* The transaction has been sent to the PAR tables and is awaiting HR action.
- *Complete:* The transaction has been sent to the PAR tables, and HR personnel have finalized the transaction.
- *Denied:* The transaction was sent to the PAR tables, and HR personnel have denied PAR approval.

Go to HR Processing

Click this link to access the HR Processing USF component where the HR Personnelist reviews and finalizes the approved transaction.

View Detail

Click this link to access a detail page that displays more information about the transaction, including:

- The specific data change that the user requested (for example, the previous and new marital status).
- Information about the approval process, including the status of each approval step.

Reviewing Transaction Detail

Access the <transaction name> page (click the View Detail link for a transaction on the Workflow Inquiry (USF) page).

Note. The page name and certain field vary depending on the transaction type.

Marital Status Change

Abigail Zenith

*Date change takes effect: 10/25/2010

New Marital Status: Married

Previous Marital Status: Unknown

PAR Values

Action:	Data Change	DTA
Reason Code:	Status Change	STC
Nature of Action Code:	Chg in Data Element	800
Legal Authority (1):	5 U.S.C. 552a(e)(5). Accu	CGM
Legal Authority (2):		
PAR Remarks:		

<Transaction Detail> page (1 of 2)

Fed Mar Change Approval Chain



PAR Result: Not yet available to Human Resources

Administrator Actions

Current Transaction Status In Approval Process

[Go To HR Processing](#)

<Transaction Detail> page (2 of 2)

At the top of the page, you can see the previous and new values for the requested data change. The specific fields that appear depend on the type of transaction.

PAR Values

This group box displays data that will be written to the PAR tables for this transaction. This data is not provided by the self-service user; instead, you use the Defaults/Admin setup page to provide transaction-specific default values for each field.

See *PeopleSoft Enterprise eProfile 9.1 PeopleBook*, "(USF) Setting Up Approvals," Defining PAR Tracking Data.

Approval Details for AWE Transactions

When transaction approvals are processed using AWE, the transaction details page includes a graphical representation of the approval flow.

The approval chain diagram includes a box for each approver. The box title shows the approver's status, while the box contents include the approver's name, the approver's role in the approval process (for example, First Authorizer), and the date, if any, when the approver took action on the approval request.

Approval Details for Non-AWE Transactions

When the transaction predates the use of AWE to manage approvals for federal self-service transactions, the approval steps appear in a grid rather than as a graphical representation of the approval flow.

This grid lists each approver by role and by name and displays the action (if any) taken by the approver, the date the action was taken, and any comments entered by the approver at the time the action was taken.

PAR Result

PAR Result (Personnel Action Request Result)	Displays a message that corresponds to the PAR Result field on the Workflow Inquiry (USF) summary page.

Administrator Actions

Current Transaction Status	Displays a message that corresponds to the Status field on the Workflow Inquiry (USF) summary page.

Select this option as the request cannot be completed via Self-Service. You will be required to manually enter the request into PAR	This check box and the Save button appear only if the current transaction status is <i>Error with CI</i> . Select the check box to acknowledge that you know you must manually enter the request into PAR, then click the Save button.

Go to HR Processing

Click this link to access the HR Processing USF component where the HR Personnelist reviews and finalizes the approved transaction (and where you manually enter the transaction data if necessary).

This link is not available if the current transaction status is *Error With Approval Routing* because such errors must be addressed in the AWE approval monitor (the Monitor Approval page).

Setting Up Access to Direct Reports Data

To set up access to direct reports data, use the Direct Reports Setup component (SS_LINK_TBL).

This section discusses how to:

- Determine access to manager self-service.
- Set up direct reports.
- Set up transaction instructional messages.

Note. If you are setting up direct reports data for ePerformance or eProfile, use the pages documented in the "Working With Common Components" chapter.

See [Chapter 35, "Working with Common Components," Configuring Direct Reports Functionality, page 858.](#)

Pages Used to Set Up Direct Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Target Information	SS_LINK_TBL	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Target Information	Set up worker data access for the Manager self-service option.
Instructional Text	SS_LINK_TBL2	Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Instructional Text	Add instructional messages to the Select Employee page (OPRROWS) for this transaction component.service.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Configure Direct Reports UI	HR_DR_UI_CFG_1	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI	Select the ePerformance or eProfile transaction that you want to configure for direct reports or user interface behavior. See Chapter 35, "Working with Common Components," Configuring Direct Reports Functionality, page 858.
Configure Direct Reports UI	HR_DR_UI_CFG_2	Click the Configure button for the selected transaction on the Configure Direct Reports UI component page.	Configure direct reports or user interface behavior for ePerformance or eProfile self-service transactions. See Chapter 35, "Working with Common Components," Configuring Direct Reports Functionality, page 858.

Determining Access to Manager Self-Service

The system determines who can access the manager self-service components and data by determining the answers to these questions:

- Is this user a manager?
- Who reports to this manager?

You determine a user's access to some or all of the manager self-service components when you define their component access on the Permission List page. In the Direct Reports Setup component, you specify whose data a user can see for a particular manager self-service transaction.

The system determines what kind of reporting relationship exists between managers and their staff. Reporting relationships are determined on two pages: the Work Location page (JOB_DATA1) and the Department Profile page (DEPARTMENT_TBL_GBL). On the Work Location page, you indicate who a worker's manager is. On the Department Profile page, you indicate who manages a department and the staff who report to that department.

Note. This section does not apply to the manager role in PeopleSoft Enterprise Talent Acquisition Manager.

See Also

[Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 312](#)

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Entering Employee Job Location and Position Information

[Chapter 11, "Setting Up Organization Foundation Tables," Defining Basic Information About a Department, page 300](#)

Setting Up Direct Reports

Access the Target Information page (Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Target Information).

Target Information		Instructional Text	
Component Name:	CO_PE_MGRRPTS_COMP	Market:	GBL
Menu Name:	ROLE_MANAGER		
Menu Bar Name:	INQUIRE		
Item Name:	HR_EE_INF_MGR		
Page Name:	HR_EE_INF_HOME		
Access Mode:	Update/Display		
Record (Table) Name:	HR_SS_EMPL_SRCH		
Access Type:	By Department Manager ID		
	☐ Update Own Info		

Target Information page

Note. If you are setting up direct reports data for ePerformance or eProfile, use the pages documented in the "Working With Common Components" chapter.

See [Chapter 35, "Working with Common Components," Configuring Direct Reports Functionality, page 858.](#)

Note. To determine technical names of the system objects, use PeopleSoft Application Designer.

Component Name	Enter the component name as defined on the menu in PeopleSoft Application Designer. The component name is the name of the Select Employee page that the system displays when the user selects a Manager self-service transaction. It isn't the name of the transaction component.
Menu Name	Select <i>ROLE_MANAGER</i>. All Manager self-service transactions are delivered on this menu. To grant manager access to components on other menus, select the name of the menu that the component is on.
Menu Bar Name	Select the name of the menu bar that the transaction component is under.
Item Name	Enter the component's item name. The item name is the system name of the transaction component, not the component name of the Select Employee page. The transaction component contains pages that the manager uses to view or manipulate staff data.
Page Name	Enter the object name of the transaction component's page. The object name for each Manager self-service transaction is listed in the introduction table of the page discussion. If a transaction component has more than one page, enter the name of the transaction page that the system displays first (usually the first page in the component) when a user selects a person name.
Access Mode	Select which action the user performs in the transaction. Options are <i>Add</i>, <i>Update/Display</i>, <i>Update/Display All</i>, and <i>Correction</i>.
Record (Table) Name	Enter the object name of the record that makes up the page of the transaction component.

Access Type

This field defines the reporting relationship used by the Select Employee page for this transaction component. Available options are:

- *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page. For users who are department managers, the system displays a list of the workers who are in the user's department.
- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Group ID:* Determines data access using the Group ID set up in the group build feature.
- *By Part Posn Mgmt Dept Mgr ID:* Defines the reporting relationship by the Reports To field on the Work Location page and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID.
- *By Part Posn Mgmt Supervisor:* Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Supervisor ID.
- *By Reports To Position:* Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position.
- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.

Update Own Info

(update own information)

Not applicable to self service. Select to allow managers to update their own information in this transaction component.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Chapter 5, "Setting Up and Administering HRMS Security," Creating and Modifying Security Trees, page 85

Setting Up Transaction Instructional Messages

Access the Instructional Text page (Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup, Instructional Text).

Target Information		Instructional Text	
Component Name:	CO_PE_MGRRPTS_COMP	Market:	GBL
Direct Reports - Page Instructional Text			
Title Message Set:	18032	Title Message Number:	378
Message Text:	Employee Information		
Instructions Message Set:	18032	Instructions Message Number:	693
Explain:	Select an employee to display her/his information by selecting the employee name. To find a specific direct report, select the 'Search for an employee' button. To drill down into the direct reports of one of your employees select the org chart icon.		

Instructional Text page

Direct Reports - Page Instructional Text

Title Message Set and Title Message Number Enter the title message set and number of the transaction instructions title that the system displays on this component's Select Employees page.

Message Text Displays the text of the transaction instruction title that is associated with the Title Message Number. The system displays this text on this component's Select Employees page.

Instructions Message Set and Instructions Message Number Enter the number of the instructions message set and number for the instruction message that the system displays on this component's Select Employees page.

Explain Displays the text of the instruction message that is associated with the Instructions Message Number. The system displays this text on this component's Select Employees page.

Tells the user how to select the employees whose data they want to view or manipulate.

Using Workflow with Self-Service Transactions

To use workflow with self-service transactions, use the Set Workflow Defaults component (WF_SYSTEM_DEFAULTS), Transaction Categories component (EO_TRAN_CATS), Workflow Transactions component (EO_TRANSACTIONS), System Workflow Rules component (EO_SYS_WF_RULES), Workflow Status component (HR_WF_STATUS), and Workflow User Preferences component (HR_SS_WF_EE_PREF).

This section discusses how to:

- Activate workflow message defaults.

- Set user notification preferences.
- Define rules for workflow notifications.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Pages Used to Activate Workflow

Page Name	Definition Name	Navigation	Usage
Worklist System Defaults	WF_SYS_DEFAULTS	PeopleTools, Workflow, Defaults & Messages, Set Workflow Defaults, Worklist System Defaults	Set default parameters for workflow messages.
Workflow Transaction Categories	EO_TRAN_CATS	Set Up HRMS, Common Definitions, Self Service, Transaction Categories, Workflow Transaction Categories	Defines the category for self-service transactions. Generally, all self-service transactions are assigned to HR_TRANSACTIONS. This data is supplied by PeopleSoft and it is recommended that you not change this information.

Page Name	Definition Name	Navigation	Usage
Workflow Transactions	EO_TRANSACTIONS	Set Up HRMS, Common Definitions, Self Service, Workflow Transactions	Register self-service transactions as workflow transactions by associating them with the appropriate workflow functionality and assigning a workflow transaction category. For transactions that do not use the Approval Framework, the a category is supplied by PeopleSoft and we recommend that you not change this information. For transactions that use the Approval Framework, you must additionally specify the approval process ID associated with the transaction. You can also enable delegation of transaction initiation and approval. See Chapter 27, "Setting Up and Working with Approvals," Linking Workflow Transactions, page 669.
System Workflow Rules	EO_SYS_WF_RULES	Set Up HRMS, Common Definitions, Self Service, System Workflow Rules, System Workflow Rules	For every SetID where you plan to use workflow, set the rules for workflow notification.
Workflow Status	HR_WF_STATUS	Set Up HRMS, Common Definitions, Self Service, Workflow Status, Workflow Status	For each self-service transaction, specify what workflow is triggered. Changes to the approval path can be made, but is not recommended.
Workflow User Preferences	HR_SS_WF_EE_PREF	Self Service, Workflow User Preferences, Workflow User Preferences	Set up a user's notification method for workflow messages.

Activating Workflow Message Defaults

Access the Worklist System Defaults page (PeopleTools, Workflow, Defaults & Messages, Set Workflow Defaults, Worklist System Defaults).

Worklist System Defaults

System Default User

*User ID:

HCR_WFADMIN

System Wide Route Processing

☒ Worklists Active

☐ Delete Pooled WL When Select

☒ Email Active

☒ HR Installed

Resubmit VA worklist

☒ Not allowed

☐ Admin/Role User only

☐ Yes for everyone

Worklist System Defaults page

Make sure the Worklist Active,Email Active, and HR Installed check boxes are selected.

Defining Rules for Workflow Notifications

Access the System Workflow Rules page (Set Up HRMS, Common Definitions, Self Service, System Workflow Rules, System Workflow Rules).

System Workflow Rules

Set ID: SHARE Table Set shared across Corp

Category Workflow Rules				
*Transaction Category	*Workflow Rule	Notify User - Entry	Notify - All	Notify - Final Disposition
All HRMS Transactions	Both	☒	☒	☒

System Workflow Rules page

For different rules to exist for different business units, specify these rules at the SetID level.

Note. You must specify this information when you implement PeopleSoft HRMS.

Transaction Category Select a transaction category.

- Workflow Rule** Define how the system notifies users when they're required to perform a function. Values include:
- *Email*: Notify the user via email.
 - *Worklist*: Notify the user by placing an entry in the user's worklist.
 - *Both*: Notify the user by both email and worklist.
 - *None*: No notification.
 - *User*: Enable the user to define a preference. The user specifies preferences on the Workflow User Preferences page.
- Notify User - Entry** Select if users are to receive confirmation when initiating transactions.
- Notify All** Select if users are to be notified each time someone processes one of their transactions.
- Notify - Final disposition** Select if users are to be notified when the final disposition has been made for the request.

See Also

[Appendix C, "Delivered Workflows for PeopleSoft HRMS," page 1023](#)

Setting User Notification Preferences

Access the Workflow User Preferences page (Self Service, Workflow User Preferences, Workflow User Preferences).

Category Workflow Rules	
Transaction Category	*Notification Method
HR_TRANSACTIONS	Both

Save

Workflow User Preferences page

Select the method of workflow notifications.

Chapter 35

Working with Common Components

This chapter provides an overview of PeopleSoft HRMS common components and discusses how to:

- Configure Direct Reports functionality.
- Configure person search.
- Set up employee mouse over popup pages.
- Configure and work the HR Notepad.
- Set up the Text Catalog.
- Configure attachments.

Note. PeopleSoft Human Resources also delivers as common components the approval workflow, delegation, and XML publishing functionality. These features are discussed in their respective chapters.

See Also

[Chapter 27, "Setting Up and Working with Approvals," page 659](#)

[Chapter 28, "Setting Up and Working with Delegation," page 707](#)

[Chapter 30, "Working with HCM Transformation Framework," page 773](#)

Understanding PeopleSoft HRMS Common Components

This section lists common elements and discusses common component pages.

Common Elements Used in this Chapter

Object Owner ID	Identifies the application in which a common component is used. This is delivered functionality.
Sub ID (sub application ID)	Used to further partition component entries by function. . For example, the Sub ID of <i>M</i> (Manager) allows component entries different from those of a Sub ID of <i>E</i> (Employee).

Common Component Pages

PeopleSoft provides common pages to perform functionality across multiple Human Capital Management (HCM) applications. These pages are implemented as plug-in applications that you can easily configure and embed into an application via provided application program interface (APIs).

These applications are typically used to capture, store and present information for a particular generic function within the context of a calling application (for example, an application such as eRecruit, ePerformance or Benefits Administration).

Data Structures

Each common component manages its own data source. These common components have keys. All applications that embed the plug-in share the same data structure that uses a configurable key structure to accommodate the different requirements that each application has for organizing this data. Each application defines, or registers, the actual keys that are used when the plug-in runs within the context of the application that has embedded it. You register the keys by making an entry for the application in the plug-in's configuration page, which is keyed by the object owner ID of the embedding application.

User Interface

The use of plug-ins enables all applications that embed a plug-in to present the data consistently. For example, the same format is used to capture and present context-sensitive notes, whether the user is in eRecruit, ePerformance, Payroll for North America, or Benefits. To provide context-sensitive instructional text, labels, and so forth, each of the plug-in applications uses the text catalog to provide context sensitivity while maintaining a consistent style across all of HCM.

Configurable Behavior

Some embedding applications need the ability to enable, disable, or modify the plug-in functionality. Applications manipulate these configuration options inside the plug-in's configuration page—the same place it registers its keys.

HCM plug-ins, except for the text catalog, are embedded in an application by placing a graphic button on a page, and a simple API call on the button's FieldChange PeopleCode. The Text Catalog is generally invoked via an API in component-build, and/or PageActivate code.

Warning! Be careful when modifying configurations. PeopleSoft does not support some modifications, for example changing key values, that might cause other functionality in the application to not work as intended.

Configuring Direct Reports Functionality

To configure direct reports functionality, use the Configure Direct Reports UI (HR_DR_UI_CFG) and component.

This section provides an overview of direct reports and discusses how to:

- Configure components and transactions for direct reports functionality.

- Select the actions and fields that appear on the direct reports UI.
- Test the direct reports API.
- View exceptions and data returned by a method.
- View the trace log of method executions.
- Test the direct reports user interface.

See Also

PeopleSoft Enterprise ePerformance 9.1 PeopleBook, "Generating Documents," Generating Documents as a Manager

Understanding Direct Reports Functionality

Direct reports information is used throughout HCM applications, especially in the manager self-service applications. Typically, direct reports information is used in a way that involves navigating an organizational hierarchy. For example, a manager uses Direct Reports to promote or give a raise to an employee. You may use direct report information in:

- Drill-down mode, enabling managers to select workers for processing in a self-service application.
- Chain of command mode, which determines workflow for approvals and notifications.

There are two major components for implementing direct reports functionality:

- Data service.

The data service navigates an organization structure and returns a list of workers that report to a particular manager or a management hierarchy for a particular worker. The data service is completely unaware of its context, which enables to service both online and batch requests.

- User Interface.

This is a common, configurable user interface (UI) that is de-coupled from data service. It receives information from the data service and presents it in a streamlined, consistent, reusable UI that enables users to visually navigate an organizational structure and select one or more workers for processing.

Direct Reports for Self Service Applications

There are two methods of setting up direct reports functionality. If you are setting up direct reports for the following applications, use the Direct Reports Setup (SS_LINK_TBL) component:

- PeopleSoft Enterprise eDevelopment
- PeopleSoft Enterprise eCompensation
- HRMS Portal Pack
- PeopleSoft Enterprise ePay
- PeopleSoft Enterprise Stock Administration

Note. Otherwise, use the Configure Direct Reports UI component described in this section.

See Also

Chapter 34, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data, page 847

Pages Used to Configure Direct Reports Functionality

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manager Desktop Transactions	HR_DR_UI_CFG_1	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI, Manager Desktop Transactions	Configure the components and transactions that include the direct reports data functionality.
Manager Desktop Transactions - Configure	HR_DR_UI_CFG_2	Click the Configure button for an application on the Manager Desktop Transactions page.	Select the actions and fields that appear on the direct reports UI for a transaction.
Invoke Direct Reports API - Set / Execute	HR_DRPT_API_EXEC	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set / Execute	Test the direct reports API.
Invoke Direct Reports API - Execution Results	HR_DRPT_API_RSLTS	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set/Execute Select the Execution Results tab on the Invoke Direct Reports API - Set/Execute page.	View the exceptions and data returned by a method.
Invoke Direct Reports API - Trace Results	HR_DRPT_API_TRACE	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set/Execute Select the Trace Results tab on the Invoke Direct Reports API - Set/Execute page.	View the trace log of a method execution.
Invoke Direct Reports UI API	HR_DRPT_API_UITEST	Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports UI API, Invoke Direct Reports UI API.	Test the direct reports user interface.

Page Name	Definition Name	Navigation	Usage
<application context>	HR_DR_ADDDL_INFO	Select a value from the Component Name field and click Execute API on the Invoke Direct Reports UI API page.	Enter a date to use to generate a list of direct reports to invoke the specified application context.
<application context> - Select <context>	HR_DR_SELECT_EMPS	Click Continue on the <application context> (HR_DR_ADDDL_INFO) page.	View a list of direct reports and select employees to add to the API Results list on the Invoke Direct Reports UI API page.

Configuring Components and Transactions for Direct Reports Data Functionality

Access the Manager Desktop Transactions page (Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI, Manager Desktop Transactions).

Manager Desktop Transactions				
		Customize Find 	First 1-35 of 35 Last	
*Component Name	Transaction Name	*Description		
EP_APPR_SELECT	EP_CREATE 	View-Only Documents	Configure	-
EP_CREATE_MY_DVL	EP_CREATE 	Create Documents: Development	Configure	-
EP_CREATE_MY_DVL_G	EP_CREATE_GRP 	Create Documents by Group: Dev	Configure	-
EP_CREATE_MY_PRF	EP_CREATE 	Create Documents: Performance	Configure	-
EP_CREATE_MY_PRF_G	EP_CREATE_GRP 	Create Documents by Group: Prf	Configure	-
FE_MGR_FTPT_CHNG	FE_MGR_FTPT_CHNG 	Full/Part Time Change	Configure	-
FE_MGR_LOC_CHG	FE_MGR_LOC_CHG 	Location Change	Configure	-
FE_MGR_PROMOTE	FE_MGR_PROMOTE 	Promotion	Configure	-
FE_MGR_REASSIGN	FE_MGR_REASSIGN 	Reassignment	Configure	-
FE_MGR_REPORT_CHNG	FE_MGR_REPORT_CHNG 	Reporting Change	Configure	-
FE_MGR_RETIRE	FE_MGR_RETIRE 	Retirement	Configure	-
FE_MGR_SEPARATE	FE_MGR_SEPARATE 	Separation	Configure	-
GP_ABS_MGRSS_BAL	GP_ABSENCE 	Absence	Configure	-
GP_ABS_MGRSS_HIST	GP_ABSENCE 	Absence	Configure	-
GP_ABS_MGRSS_REQ	GP_ABSENCE 	Absence	Configure	-
+				

Manager Desktop Transactions page

Displays a list of components and transactions for which direct reports functionality is enabled. You can add a new component and transaction or click the Configure button to specify how the direct reports API and UI function within the context of the component and transaction.

Selecting the Actions and Fields that Appear on the Direct Reports UI

Access the Manager Desktop Transactions - Configure page (Click the Configure button for an application on the Manager Desktop Transactions page).

Data

Find | View All | First | 1 of 35 | Last

Component Name: EP_APPR_SELECT

Transaction Name: EP_CREATEView-Only Documents

Processing Rules

Access Type:By Department Manager ID

☐ Update Own Info

☒ Allow Indirect Reports

☐ Force Group Refresh

☐ Allow Empty Position

☐ Select Multiple Employees

Displayed Fields

☒ Employee ID

☐ Empl Record

☐ Position Number

☐ Employee Status

☐ Full/Part Time

☐ Location Name

☐ Job Code

☒ Job Title

☐ Department ID

☒ Department Name

☐ Location Code

Return

Manager Desktop Transactions - Configure page

Processing Rules

Access Type

Select the reporting relationship to use for determining who reports to whom. This field defines the reporting relationship used by the Select Employee page for this transaction component and determines which method is used to identify who approves the transaction. Available options are:

- *By Department Manager ID:* Defines the reporting relationship based on information in the Manager ID field on the Department Profile page (DEPARTMENT_TBL_GBL). For users who are department managers, the system displays a list of the workers who are in the user's department.
- *By Dept Security Tree:* Determines person data access using information from the security tree. The system presents the user with a list of people whose data the user has access to, based on the security tree.
- *By Group ID:* Determines data access using the Group ID set up in the group build feature.
- *By Part Posn Mgmt Dept Mgr ID:* Defines the reporting relationship by the Reports To field on the Work Location page (JOB_DATA1) and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID.
- *By Part Posn Mgmt Supervisor:* Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use partial Position Management. The system searches for reporting relationship based on Report To first, and then for Supervisor ID.
- *By Reports To Position:* Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of people whose job record indicates that they report to that user's position.
- *By Supervisor ID:* Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of people whose job records indicate that they are supervised by the user.

Update Own Info

Select to indicate that the user can update their own records. When you select this check box, the manager's information is returned in the direct reports results list along with their direct reports or management hierarchy.

Allow Indirect Reports

Select to return indirect reports of the user. This navigates down the organizational hierarchy and returns direct reports of direct reports and so forth until the lowest reporting level is reached.

Force Group Refresh	Select to run the Group Build process (GBP002) to refresh the group membership prior to displaying direct reports. If you do not select this check box, the group members as of the last scheduled run of the process appear on the page. The system only makes this check box available if you select the access type <i>By Group ID</i> .
Allow Empty Position	Select to return unfilled position reports. This check box is available when you select one of the position-related options as an access type.
Select Multiple Employees	Select to enable the user to select more than one worker from the search results. If this field is selected, a check box appears next to the names in the results list, otherwise a radio button appears.

Note. You should not modify this value on delivered transactions, as they are built for selection of single or multiple values and if you change the setting, the transaction as delivered might not work.

Displayed Fields

Select one or more fields to appear within the direct reports list when rendered by the application.

See Also

Chapter 34, "Setting Up and Working with Self-Service Transactions," page 831

Testing the Direct Reports API

Access the Invoke Direct Reports API - Set / Execute page (Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Set / Execute).

Set / Execute		Execution Results		Trace Results	
*Class Method: DrillDown()		Time: 1.63		Execute Method New Instance	
Class Properties					
*Navigation Method: 3 - Department Manager ID					
Target Employee ID:	KU0007	Target Empl Record:	0		
Position:		As Of:	06/11/2009		
Group ID:					
*Show Name:	True	*Show Empty Positions:	False		
*Show Indirect Indicator:	False	*Include Target Employee:	False		
*LimitDrillUp:	True	*Combine Partials:	True		
*Rebuild Group:	False	*Buffer:	False		
*Trace:	True	*Debug Mode:	False		
Has Errors:	False	Has Warnings:	False		

Invoke Direct Reports API - Set / Execute page

Class Method

Select a method from the available options:

- *DrillDown()*

Logically navigates down one level in the reporting structure to expose all of the direct reports for the worker . This is the most common use of the application class — this method returns the direct reports for a worker/job.

- *DrillUp()*

Logically navigates up one level in the reporting structure to expose the worker's supervisor and all the supervisor's direct reports.

- *GetPeers()*

Invokes the GetSupervisor() method for the target worker, and then invokes DrillUp() to expose all of the direct reports for this supervisor (which is the same as returning all the peers for a particular person).

- *GetSupervisor()*

Gets the supervisor for the target worker. This method is useful if the application needs to determine the target worker's supervisor, but not the supervisor's direct reports. For example, to send a notification to an worker's supervisor, the application must determine the identity of the supervisor.

Execute Method

Click to execute the method using the class properties you set.

Class Properties

The properties and their default values, if any, of the selected class appear in this page region. You can change any of these before executing the method.

Navigation Method	Select the method to use when determining reporting relationships. The options are: 1 - <i>Department Security Tree</i> , 2 - <i>Supervisor ID</i> , 3 - <i>Department Manager ID</i> , 4 - <i>Reports To Position</i> , 5 - <i>Position / Supervisor ID</i> , 6 - <i>Position / Dept Manager</i> , and 7 - <i>Group ID</i> .
Target Employee ID	Enter the employee ID of the target employee.
Target Empl Record	Enter the employee record number of the target employee.
Position	Enter the position of the target employee.
As Of	Enter the as of date to use when determining reporting relationships.
Group ID	Enter a group ID when Navigation Method is <i>Group ID</i> .
Show Name	Indicate if the system should include employee names in the Direct Reports Rowset grid. The default value is <i>True</i> .
Show Empty Positions	Identify whether unfilled positions should be returned in the Direct Reports Rowset grid when the navigation method is position-based. The default value is <i>False</i> .
Show Indirect Indicator	Identify whether the Direct Reports Rowset grid should indicate whether an employee has direct reports. The default value is <i>False</i> .
Note. Not applicable when Navigation Method = <i>Department Security</i> or <i>Group ID</i> .	
Include Target Employee	Should the target employee be filtered out of the returned Direct Reports Rowset and Supervisor Rowsets grids. When <i>True</i> , the target employee is not filtered out. When <i>False</i> (which is the default), circular reporting relationships are not shown.
LimitDrillUp	Indicate if the user be allowed to DrillUp to a level higher than the target employee/job that was first specified. For example, when used in a manager self-service transaction, should I be able to drill down 2 levels, and then up 3 levels to expose and select my peers? On the other hand, when used in a notification process, drilling up beyond the initial target employee/job is essential. When <i>True</i> (which is the default), DrillUp is limited.
Combine Partial	Indicate, when using one of the partial position management navigation methods, whether the secondary method be applied even if the primary method returns valid data. The default value is <i>True</i> .
Rebuild Group	Specify, when the Navigation Method is <i>Group ID</i> , if the system should force the group to be rebuilt, even if group results for this effective date already exist.

Buffer	Indicate if the service should buffer the next level up and down to increase performance. The default value is <i>False</i> .
Trace	Indicate if the service should generate a trace of processing when executing class method. The default value is <i>False</i> .
Debug Mode	Specify, when Debug Mode = <i>True</i> , if any exceptions encountered during execution should be displayed prior to the results set being displayed.

Viewing Exceptions and Data Returned by a Method

Access the Invoke Direct Reports API - Execution Results page (Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Execution Results).

Set / Execute Execution Results Trace Results

Class Method: DrillDown()

Time: 1.63

Exceptions Rowset

Severity	Set	Msg	Description

Supervisor Rowset

Customize | Find | First 1 of 1 Last

Empl ID	Empl Record	Pay Status	Name	Job Code	Dept ID	Location Code	Position	Proxy For Emplid	Proxy EmplRcd	Proxy For Position
	0									

Direct Reports Rowset

Customize | Find | View All | First 1-3 of 3 Last

Empl ID	Empl Record	Pay Status	Name	Job Code	Dept ID	Location Code	Position	Indirect Reports
K0MTX005	0	A	Diane Palmer	170005	13100	KUNY00		N
KU0065	0	A	Adland Chu	290080	13100	KUNY00	19000026	N
KU0119	0	A	Susan Hoinck	140040	13100	KUNY00		N

Invoke Direct Reports API - Execution Results page

This page enables you to view results of the method execution.

Viewing the Trace Log of Method Executions

Access the Invoke Direct Reports API - Trace Results page (Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports API, Trace Results).

Set / Execute Execution Results Trace Results		
Execution Trace Results		
Customize Find  First 1-19 of 19 Last		
	Sub-Method Name	Trace Information
1	DrillDown()	AppClass Method Invoked.
2	iDrillDown()	private method invoked.
3	iDrillDown()	class property NavigationMethod= 3
4	iDrillDown()	class property TargetEmplId= KU0007
5	iDrillDown()	class property TargetERN= 0
6	iDrillDown()	class property AsOfDate= 2009-06-11
7	iDrillDown()	class property ShowName= True
8	iDrillDown()	class property ShowIndirectIndicator= False
9	iDrillDown()	class property ShowEmptyPositions= False
10	iDrillDown()	class property CombinePartials= True
11	iDrillDown()	class property LimitDrillUp= True
12	iDrillDown()	class property RebuildGroup= False
13	iDrillDown()	class property BufferNextLevel= False
14	FetchReportsMethod3()	Method returns 4 rows.
15	RemoveTargetEmployee()	Searching for Target Employee in rowset.

Invoke Direct Reports API - Trace Results page

Data appears on this page only if you select *True* for the Trace class property.

Testing the Direct Reports User Interface

Access the Invoke Direct Reports UI API page (Set Up HRMS, Common Definitions, Direct Reports for Managers, Invoke Direct Reports UI API, Invoke Direct Reports UI API).

Invoke Direct Reports UI API

Set Application Context

Component Name: FE_MGR_LOC_CHG

Execute API

API Results

Data	
Empl ID	Display Name
KU0101	Cynthia Adams

Invoke Direct Reports UI API page

The testing of this API shows the results set that the you will see based on the current configuration. To populate the API Results grid, select a component name and click Execute API. The system will present you with two additional <application context> pages where you will enter an as of date and then select employees as of that date.

The example here shows the API Results values that were made by selecting *Cynthia Adams* from within the application context Location Change component pages.

Access the <application content> page (HR_DR_ADDL_INFO) (select a Component Name and click Execute API on the Invoke Direct Reports UI API page).

Location Change

Initiate a location change for one or more of your employees.

Instructions

Follow this 3-step process to view documents for one of your employees:

1. Enter the date this Location change takes effect. You will be able to process only those employees that report to you as of this date.
2. Select one or more employees to update.
3. Review the information and/or select any of the additional information links listed on the page. Submit the change.

Enter the as of date

Enter the date this change is effective. This is the first day that the employee(s) will be assigned to the new location.

06/12/2009

Continue

Example of Location Change page

Access the <application content> - select page (HR_DR_SELECT_EMPS) [enter an as of date and click Continue on the <application content> page (HR_DR_ADDL_INFO)].

Location Change

Select the employee(s) and new location.

Instructions

On this page, you'll select the employee(s) for whom you'd like to initiate a Location Change. You can initiate transactions only for employees who reported to you as of the date you entered on the first page.

The  'Org Chart' icon that optionally appears in the list of employees below indicates that other employees report to this employee. You may drill-down into the organization to select employees who indirectly report to you by selecting on these 'Org Chart' icons. You may also navigate back up the organization after drilling-down by selecting on the  'Drill-Up' icon above the list of employees.

After you've selected the employee(s) you'd like to process, select the *Continue* button to enter the details about the transaction and finish the process.

[Return to Previous Page](#) [View Selected Employees](#)

Select Employees

Reports To: **Betty Locherty** As Of: 06/12/2009

[Continue](#)

Select Employees [Customize](#) | [Find](#) |  First **1 of 1** Last

Select	Name	Empl ID	Job	HR Status	Position	Job Code	Job Code Description	+
☐	Cynthia Adams	KU0101	0	Active	19000074	600165	Corporate Controller	

[Select All](#) [Deselect All](#)

[Continue](#)

Example of Location Change page

Use this page to select the direct reports. The direct reports plug-in executes within the context of the component and returns the results to the API Results grid on the Invoke Direct Reports UI API page.

Configuring Person Search

To configure the person search, use the Configure Person Search (HR_PSS_CONFIG) component

This section provides an overview of simple person search and discusses how to:

- Configure components for simple person search.
- Test simple person search.

Understanding Simple Person Search

This page enables users of an application to search for and select a person to process. Using this component, an application can easily render a UI that prompts the user for partial names and displays a list of candidates from which the user can select. Additional features include optional drill-down to additional non-sensitive data.

Pages Used to Configure Simple Person Search

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Configure Simple Person Search	HR_PSS_CONFIG	Set Up HRMS, Common Definitions, Person Search Match, Configure Simple Person Search, Configure Simple Person Search	Configure components for simple person search.
Invoke Person Search API	HR_PSS_TEST_API	Set Up HRMS, Common Definitions, Person Search Match, Invoke Person Search API, Invoke Person Search API	Test simple person search within the context of an application.
Person Search - Simple	HR_PSS_SEARCH	Select an Object Owner ID value and click the Execute API button on the Invoke Person Search API page.	Search for and select a person. This page is invoked from several calling applications.

Configuring Components for Simple Person Search

Access the Configure Simple Person Search page (Set Up HRMS, Common Definitions, Person Search Match, Configure Simple Person Search, Configure Simple Person Search).

Configure Simple Person Search

Object Owner ID: ePerformance Management

Sub Application: NOM

Max Rows: 300

☒ Select Multiple Employees

☒ Alternate Character Names

☐ Expose Employee IDs

HR Status Checkboxes

*HR Status: Hidden

☒ HR Status Active

☐ HR Status Inactive

Per Org Checkboxes

*PerOrg: Hidden

☒ Employees

☒ Contingent Workers

☐ Persons of Interest

Configure Simple Person Search page

You select the options that govern how an application searches for and returns person information on the Simple Person Search page within an application.

Max Rows (maximum rows)	Enter the maximum results rows to return to the calling application. Any rows that meet the search criteria are returned and appear in the results list. If a search returns more than the maximum number of rows, the user is prompted with a message that the search returns more than the maximum number of people and asks them to narrow the search.
Select Multiple Employees	Select to enable the user to select more than one person from the search results. If you select this field, a check box appears next to the names in the results list, otherwise a radio button appears.
Alternate Character Names	Select to enable the user to search for names by entering the search string in alternate character format. If you configured the system to enable the entry of names in alternate character format, this check box is selected by default.
Expose Employee IDs	Select to have the person's ID appear in the results details. This field is deselected by default.

HR Status

Select one of these values:

- *Hidden*

HR status values for the persons found by the search do not appear in the results list.

- *Display Only*

HR status values for the persons found by the search appear in the results list.

- *Enterable*

Enables the user to search by HR status values. These appear as check boxes on the Person Search page.

HR Status Active

Select to return rows for active workers only. This check box is selected by default.

HR Status Inactive

Select to return rows for inactive workers only.

PerOrg(person organizational relationship)

Select one of these values to control how the person's relationship to the organization is used on the Person Search page:

- *Hidden*

The organization relationship does not appear in the results list.

- *Display Only*

The organization relationship appears in the results list.

- *Enterable*

Enables the user to select the person organization relationships to include in the search. These appear as check boxes on the Person Search page.

Employees

Select to return employees in the search results. This field is selected by default.

Contingent Workers

Select to return contingent workers, for example, temps or contractors, in the search results.

Persons of Interest

Select to return other persons of interest, for example, retirees or job applicants, in the search results.

Testing Simple Person Search

Access the Invoke Person Search API page (Set Up HRMS, Common Definitions, Person Search Match, Invoke Person Search API, Invoke Person Search API).

Data	
Empl ID	Display Name
KU0101	Cynthia Adams

Invoke Person Search API page

This page enables you to test the configuration of the Simple Person Search page within the context of an application and sub application that you select. When you click **Execute API** the search page is rendered as you configured it for the application. You can enter any search criteria to view how the results appear.

Searching for and Selecting a Person from the Simple Person Search Results

Access the Person Search - Simple page (select an Object Owner ID value and click the **Execute API** button on the Invoke Person Search API page).

Person Search - Simple

Search Criteria and Results

▶ Instructions

Search Criteria

Name:
 Last Name:
 First Name:
 ACName:

☒ Employees
☐ Contingent Workers
☐ Other
☒ Active ☐ Inactive

Search Results

☐	Annabelle Adams	i
☐	Anne Adams	i
☐	Archibald Adams	i
☐	Billy Adams	i
☐	Brian Adams	i
☐	Brooke Adams	i
☐	Bryan Adams	i
☐	Bryan Adams	i
☐	Christine Adams	i
☐	Clifford Adams	i
☒	Cynthia Adams	i

Person Search - Simple page

Setting Up Mouse Over Popup Pages

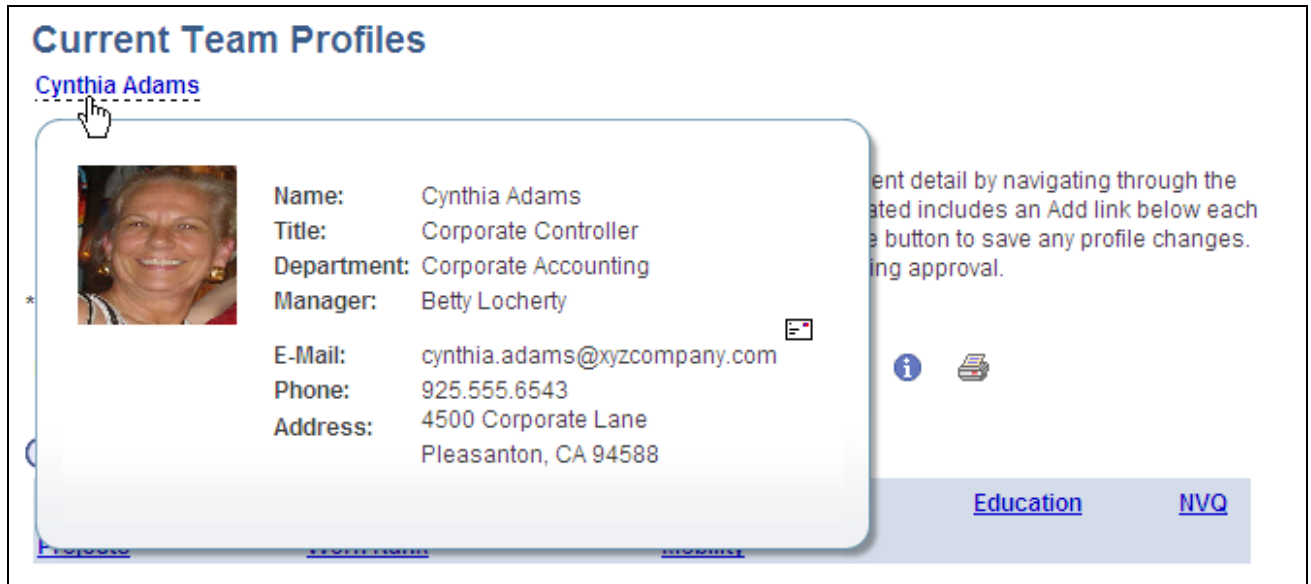
To set up the employee mouse over pop up page, use the MouseOver Field Definition (HR_MO_FLDNM_TBL), MouseOver Page Design (HR_MO_TBL), and MouseOver Component Setup (HR_MO_COMPONENTS) components.

This section provides an overview of the mouse over popup page and discusses how to:

- Define mouse over popup fields.
- Create mouse over popup page designs.
- Enable the mouse over popup page for a component.
- Indicate the ID field to retrieve the mouse over page.

Understanding the Mouse Over Popup Page

The MouseOver Popup feature enables you to quickly see additional employee or applicant information by pausing on a person's name or ID that has a dotted line under it, as shown in this example.



Example of a mouse over popup page showing additional employee data

The PeopleSoft HCM application provides you with the flexibility to configure this mouse over popup page in a way that is useful to you or other groups within your organization. You may want to set up a popup page that includes employee information such as a picture, job title, department, supervisor's name, and work location. Or, when performing certain business processes, you may find it beneficial to have a popup page that includes contact information, such as an email for an employee or applicant. You can even associate this email contact information with an icon that, by clicking, will initiate an email notification.

Create different mouse over popup page designs to associate with a specific product, feature, or user role; or share the same design across multiple products. For example, you may want to view information regarding an employee's benefit selections on one page while on another page you may find it more beneficial to view the employee's holiday schedule.

Mouse Over Popup Page Layout and Design

Use the MouseOver Page Design component to identify mouse over IDs, which define the fields and number of columns that should appear on a given mouse over popup page. The system delivers these three layout designs that enable you to display pages differently:

- One column of data (HR_MO_DSP_1_POP)
- Two columns of data (HR_MO_DSP_1_2_POP)
- An employee picture in one column and a second column of data (HR_MO_DSP_P_2_POP)

Each column can include up to seven fields. However, when you include an employee's picture on the mouse over popup page, the image will display in column 1 and no other fields will appear in that column.

The PeopleSoft application delivers these mouse over IDs:

<i>Mouse Over ID</i>	<i>Description</i>
APPLICNT_INFO_1	Applicant Information – Column 1 and Column 2 of data
APPLICNT_INFO_2	Applicant Information – One column of data
EMPLOYEE_INFO_1	Employee Information – Employee Picture and one column of data
EMPLOYEE_INFO_2	Employee Information – Column 1 and Column 2 of data
EMPLOYEE_INFO_3	Applicant Information – One column of data

Note. PeopleSoft recommends that if you want to use a variation of one of these delivered mouse over IDs that you insert a row in the MouseOver Page Design for the ID and use the Owner ID and Sub ID fields. Do not modify the delivered value other than by inserting a row and using the owner field, since other applications may be using the delivered value. Changes to the delivered ID can affect other application currently using the mouse over ID.

Prior to creating your mouse over popup page designs, you must identify the fields that can be included on the page in the MouseOver Field Definition component. The PeopleSoft application delivers these predefined fields:

<i>Applicant Data</i>	<i>Person and Job Data</i>
• APPLID (Applicant ID) • APP_ADDRESS (Applicant Address) • APP_EMAIL (Applicant E-Mail) • APP_EMAIL_PRF (Applicant E-Mail Preferred) • APP_EMPLID (Applicant Employee ID) • APP_NAME (Applicant Name) • APP_PERSON_ID (Applicant Person ID) • APP_PER_STATUS (Applicant Type) • APP_PHONE (Applicant Phone) • APP_PHONE_PRF (Applicant Phone Preferred) • APP_POI_TYPE (Applicant POI Type) • APP_PERF_CONT (Applicant Preference Contact) • APP_STATUS_CODE (Applicant Status Code) • APP_STATUS_REASON (Applicant Status Reason)	• ADDRESS (Address) • BUSINESS_UNIT (Business Unit) • COMPANY (Company) • DEPTID (Department) • EMAIL (E-Mail) • EMPLID (Person ID) • EMPL_STATUS (Payroll Status) • ESTABID (Establishment ID) • GRADE (Grade) • HR_STATUS (HR Status) • JOBTITLE (Job Title) • LOCATION (Location) • MANAGER_ID (Manager) • NAME (Employee Name) • PHONE (Phone) • REG_REGION (Regulatory Region) • SAL_ADMIN_PLAN (Salary Plan)

Warning! Adding other fields is considered a customization and requires modifications to the Application Package/Class (HR_MO_COMMON: SET_UP_COMMON) PeopleCode that is used to retrieve the data associated with any new fields.

PeopleTools Application Designer Setup

The majority of the setup for the mouse over popup page is done through delivered PIA setup pages in the HRMS system. However, the Mouse Over Popup properties must also be set within the page field properties within Application Designer by enabling the page popup and selecting the page layout, which is identified in the MouseOver Page Design component, Suggested Popup Page field. When mouse over popup is set up, the system places the mouse over indicator of a dotted underline under the field, which will initiate the popup.

Note. The Mouse Over Popup feature can be applied to many different pages within HCM as long as the employee or applicant ID is located at level 0 in the record structure.

Important! When you have set up a page field property for use with the mouse over popup, and this page is used in a component, the mouse over indicator will be present on the page. If this page exists in multiple components and each of those components has not been properly setup then the user will receive a message indicating so.

For more information about page levels and enabling mouse over popup pages, see *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*.

Pages Used to Configure the Employee Mouse Over Page

Page Name	Definition Name	Navigation	Usage
MouseOver Field Definition	HR_MO_FLDNM_TBL	Set Up HRMS, Common Definitions, Mouse Over Popup, MouseOver Field Definition, MouseOver Field Definition	Define mouse over popup fields and supporting fields that will be available in the MouseOver Page Design component and can be used with the mouse over popup page. Note. Only the fields delivered as system data will be retrieved by the mouseover popup application class.
Mouse Over Column 1	HR_MO_CL1_TBL	Set Up HRMS, Common Definitions, Mouse Over Popup, MouseOver Page Design, Mouse Over Column 1	Create mouse over page designs by defining the fields for the first column of the mouse over popup page.
Mouse Over Column 2	HR_MO_CL2_TBL	Set Up HRMS, Common Definitions, Mouse Over Popup, MouseOver Page Design, Mouse Over Column 2	Create mouse over page designs by defining the fields for the second column of the mouse over popup page.
MouseOver Component Setup	HR_MO_COMP_SETUP_1	Set Up HRMS, Common Definitions, Mouse Over Popup, MouseOver Component Setup, MouseOver Component Setup	Enable the mouse over popup page for a component. Define the components which will utilize the Mouse Over Popup feature. This setup will define the popup type, the mouse over ID to be used with the component, and the owner and sub owner ID, if needed.
Person Detail	HR_MO_COMP_SETUP_2	Click Person Detail on the MouseOver Component Setup page.	Indicate the ID field to retrieve the mouse over page.

Defining Mouse Over Popup Fields

Access the MouseOver Field Definition page (Set Up HRMS, Common Definitions, Mouse Over Popup, MouseOver Field Definition, MouseOver Field Definition).

MouseOver Field Definition

Field Name: JOBTITLE

Field Name Data

Find | View All | Field Name Data 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Job Title

Short Description: Job Title

Label: Title

Supporting Fields for Setup

☒ Show Display Field

☒ Show Type Field

☐ Show Icon Field

MouseOver Field Definition page

Define the fields that are configured for use with the mouse over popup page. There are 31 fields that we are delivering with this feature. Adding any other fields would be considered a customization and will require peoplecode modifications to the Application Package/Class (HR_MO_COMMON: SET_UP_COMMON) that is used to retrieve the data associated with any new fields.

Note. Only the fields delivered as system data will be retrieved by the mouseover popup application class. Any new fields added to the component require modifications to HR_MO_COMMON application package in order to retrieve the data.

- Field Name

Define a field name that should be available for entry on the MouseOver Page Design pages when creating the design of the mouse over popup page for the user. The PeopleSoft application delivers several predefined fields for the mouse over popup page.

See Chapter 35, "Working with Common Components," Mouse Over Popup Page Layout and Design, page 876.
- Label

Define the default label name that will appear on the mouse over popup page. The value you enter here will supply the default value for the Label field on the Mouse Over Column 1 and 2 page but can be overwritten on that page.

Supporting Fields for Setup

Show Display Field	Select this check box to have the Display field appear on the Mouse Over Page Design pages for this field. You use the Display field to specify whether the field value on the mouse over popup page should display the code, the description, or both the code and description for the user. For example, you can determine whether to have the Department field display the department code of <i>11000</i> , the department description of <i>Accounting</i> , or both the code and description <i>11000 Accounting</i> .
Show Type Field	Select this check box to have the Field Type field appear on the Mouse Over Page Design pages for this field. You use the Field Type field when the field can have different types of the same data. For example, you may have a phone type of <i>Home,Business</i> , or <i>Other</i> for a person.
Show Icon Field	Select this check box to have the Icon ID field appear on the Mouse Over Page Design pages for this field. You use the Icon ID field when the field can have an image associated with a field. For example, you may want to have an email field with an icon image that when selected will take the user to another window and bring up their email software.

Note. The PeopleSoft application is set up to support email field icons. You will need to make modifications to PeopleCode to use other types of software.

Creating Mouse Over Popup Page Designs

Access the Mouse Over Column 1 page (Set Up HRMS, Common Definitions, Mouse Over Popup, MouseOver Page Design, Mouse Over Column 1) or the Mouse Over Column 2 page (Set Up HRMS, Common Definitions, Mouse Over Popup, MouseOver Page Design, Mouse Over Column 2).

Mouse Over Column 1

Mouse Over Column 2

Mouse Over ID:

EMPLOYEE_INFO_3

Mouse Over Data

Find

View All

First

1 of 1

Last

*Effective Date:

04/09/2009

*Description:

Employee Info Popup Page - One Column

Owner ID / Sub ID Data

Find

View All

First

1 of 1

Last

Owner ID:

Sub ID:

☐ Include Employee Picture

+

-

Suggested

Popup Page:

HR_MO_DSP_1_POP

Field Hazard is empty

Customize

Find

First

1-7 of 7

Last

*Ord Seq	*Field Name	*Fieldname	Field Type	*Display	Label	Icon ID	Icon	Icon Text
1	1	NAME	Employee Name		Name			
2	2	JOBTITLE	Job Title	DESC	Title			
3	3	DEPTID	Department	DESC	Department			
4	4	MANAGER_ID	Manager	Position then Supervisor	Manager			
5	5	EMAIL	E-Mail	Business	E-Mail	IM_ICON_EMAIL		Work Email
6	6	PHONE	Phone	Business	Phone			
7	99	ADDRESS	Address descr	Business	Address			

Mouse Over Column 1 page

Note. Set up the Mouse Over Column 2 page the same way you set up the Mouse Over Column 1 page with the exception of the Owner ID / Sub ID Data fields. The Include Employee Picture check box and the Popup Page field are available on the Mouse Over Column 1 page only. The Owner ID and Sub ID fields are display only on the Mouse Over Column 2 page.

When creating a mouse over popup page, you can define fields to display in column 1 only, column 2 only, or both columns 1 and 2.

Mouse Over ID

Enter a mouse over ID that defines this unique mouse over popup page layout. You will associate this code with each component that should use this mouse over popup layout.

Owner ID / Sub ID Data

This level enables the system to display different items on the mouse over popup page for owners and sub owners. You can have several different owner IDs and page structures associated with the same mouse over ID.

Owner ID

Enter an owner ID when there are different views of the same popup page for different owners. For example, use this field when a group or applications want to use the same mouse over ID but would like to change the data details of an existing ID.

If you do not specify an owner id, the system uses the most recently effective mouse over ID for the display of the page. When you associate the mouse over ID with a component on the MouseOver Component Setup page, you can also enter the owner ID to specify the unique mouse over popup page design for this owner.

Include Employee Picture

Select this check box to have the popup page display the employee picture, if available. When this check box is selected, the Column 1 fields are unavailable for entry and the system displays a message that no other data will display in column 1 other than the picture.

Note. This field is only available on the Mouse Over Column 1 page and will display employee pictures only and should not be used for applicant mouse over popup pages.

Sub ID

Enter a sub owner ID in order for the system to display different views of the same pop up page for the different sub owners.

If you do not specify an owner or sub owner id, the system uses the most recently effective mouse over ID for the display of the page. When you associate the mouse over ID with a component on the MouseOver Component Setup page, you can also enter the owner ID and sub owner ID to specify the unique mouse over popup page design for this owner or sub owner.

Suggested Popup Page

Displays the name of the page layout upon saving the page and determines which popup/layout to apply to the page in application designer when using the selected mouse over ID. The page layouts identify a page with one column of data (HR_MO_DSP_1_POP), a page with two columns of data (HR_MO_DSP_1_2_POP), or a page that displays an employee's picture and one column of data (HR_-MO_DSP_P_2_POP).

Column 1 and Column 2

The fields in this grid box depend upon the Fieldname values you select and the supporting fields that you selected for this field name on the MouseOver Field Definition page. The fields and field detail data you enter on these pages determine how the system will display the mouse over popup page for the user.

Note. The system enables you to select up to seven field items per column.

Ord Seq (order sequence) Enter a sequence number up to 98 for any field name except for address fields, which the system automatically assigns with the sequence number of 99. The layout of the mouse over page puts address fields at the bottom of the column because the system displays the address as two rows.

Fieldname and Field Name

Select the fields that should appear on the mouse over popup page. Values are defined on the MouseOver Field Definition page. When you enter a value in the Fieldname field, the Field Name value displays. The grid displays additional fields based upon the supporting fields that were selected on the MouseOver Field Definition page.

Field Type

Select a specific type of field value that should display when there may be more than one option available. For example, select whether to show the business phone number or the home phone number for the Phone field.

This field is available when the Show Type Field check box is selected on the MouseOver Field Definition page for the field name.

Display	Identity how the system should display the field value to the user. You can choose to show the field value code (<i>CODE</i>), the description of the field (<i>DESC</i>), or display both the code and description in the field <i>BOTH</i>. For example, you can have the system display the job code <i>290000</i>, the description of the job <i>Clerk</i>, or have the system display both <i>290000 Clerk</i>. This field is available when the Show Display Field check box is selected on the MouseOver Field Definition page for the field name.
Label	Enter the label name that should appear for the user. The field value is provided by default from the MouseOver Field Definition page but can be overwritten on this page.
Icon ID	Specify the icon that should display for the user that will enable him or her to click and initiate contact with the person. For example, the user can click an email icon to have the system launch the email software. The PeopleSoft application supports this functionality for contacting a person through email. This field is available when the Show Icon Field check box is selected on the MouseOver Field Definition page for the field name.
Icon	Displays the icon selected in the Icon ID field.
Icon Text	Specify text that should appear when the user places the mouse over the icon. The default value comes from the icon ID description but can be overwritten here. This field is available for entry after selecting a value in the Icon ID field.

Enabling the Mouse Over Popup Page for a Component

Access the MouseOver Component Setup page (Set Up HRMS, Common Definitions, Mouse Over Popup, MouseOver Component Setup, MouseOver Component Setup).

MouseOver Component Setup									
Setup Components for Use of MouseOver Popup									
Customize Find View 100 First 16-30 of 909 Last									
	*Component Name	*Market	MouseOver Popup Type	Include Job	*Mouse Over ID	Owner ID	Sub ID	Person Detail	
16	ADDITIONAL_PAY	NLD	Employee	☒	EMPLOYEE_INFO_1			Person Detail	+ -
17	ADDITIONAL_PAY	USA	Employee	☒	EMPLOYEE_INFO_1			Person Detail	+ -
18	ADDL_HRS_INC_NL	NLD	Employee	☒	EMPLOYEE_INFO_1			Person Detail	+ -
19	ADDL_INFO_ARG	GBL	Employee	☒	EMPLOYEE_INFO_1			Person Detail	+ -
20	ADDL_INFO_BRA	GBL	Employee	☒	EMPLOYEE_INFO_1			Person Detail	+ -
21	ADD_HOST_ASSIGN	GBL	Employee	☐	EMPLOYEE_INFO_1			Person Detail	+ -
22	ADD_PER_ORG_ASGN	GBL	Employee	☐	EMPLOYEE_INFO_1			Person Detail	+ -
23	ADJUST_1042_BALANC	USA	Employee	☐	EMPLOYEE_INFO_1			Person Detail	+ -

MouseOver Component Setup page

- Component Name** Identify the component that will utilize the Mouse Over Popup functionality.
- Market** Indicate the markets for the component. The mouseover popup key structure is by component, however, when different markets exist with the same component name you can differentiate them by market. For example, you differentiate between the Canada and United States balance arrears components by entering the market code of *CAN* in one row of the component name and *USA* in another row of the component name.
- MouseOver Popup Type** Select the mouse over type that should be used within this component. Values are *Employee* and *Applicant*.
- Include Job** Select this check box to enable the user to specify the employment record number if the data retrieved through the popup should be based on a particular employee record number. When you deselect this check box, the system uses the employee's current effective job data.
- Mouse Over ID** Enter the mouse over ID that should be used in relation to this component. The mouse over ID determines the look of the mouse over popup page, which is defined in the MouseOver Page Design component.
- Owner ID and Sub ID** Enter an owner or sub owner ID when there are different views of the same popup page for different owners. If you do not specify an owner or sub owner id, the system uses the most recently effective mouse over ID for the display of the page.
- Person Detail** Click this link to access the Person Detail page and enter the record name and field name that will initiate the mouse over popup page.

Note. The field properties for a page must be setup to use a mouse over popup page in the Application Designer. When this is done the system displays the dotted lines under the ID, indicating that the Mouse Over Popup functionality has been enable for the field. The system will display an error message if the component that contains the page has not been properly setup in the MouseOver Component Setup component.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

Indicating the ID Field to Retrieve the Mouse Over Page

Access the MouseOver Component Setup - Person Detail page (click Person Detail on the MouseOver Component Setup page).

MouseOver Component Setup - Person Detail page

Employee or Applicant Record and Field

If the Include Job check box is not selected on the MouseOver Component Setup page, the system will only these fields for entry.

Employee Record Name or Applicant Record Name Enter the record in the selected component that the system will use to retrieve the employee or applicant information.

Employee Fieldname or Applicant Fieldname Specify the field from the record identified in the Employee/Applicant Record Name field that will invoke the mouse over popup page and retrieve the employee or applicant information.

Important! The field that will be used to retrieve the applicant or employee information must be at level 0 in the component and the Mouse Over Popup properties must also be set within the page field properties within the Application Designer.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*

Employment Record and Field

These fields appear when the Include Job check box is selected for the component on the MouseOver Component Setup page when the mouse over popup type is *Employee*.

Job Record Name	Enter the name of the record of the selected component that the system will use to retrieve job related information specific to an employment record number.
Job Fieldname	Enter the name of the field in the job record which the system will use to retrieve job related information specific to an employment record number.

Note. The record and field must be at level 0 of the component.

Configuring and Working with the HR Notepad

To configure the HR Notepad, use the HR Notepad Configuration (HR_NP_CONFIG) component.

This section provides an overview of the HR Notepad and discusses how to:

- Configure HR Notepad for application use.
- Set up keys for storing notes.
- Configure application note page links.
- Test the notepad configuration.
- Access the notepad page.
- Enter or update a note.

Understanding the HR Notepad

A notepad is a logical grouping of text-based notes, or a collection of notes that a user has entered within the context of an application. For example, an employee might have a performance notepad within the context of ePerformance, and a manager might have a recruiting notepad within the context of eRecruit.

You can integrate the plug-in application that maintains the HR Notepad into any HCM application. This application enables the user to record logical notes that are relevant to a row of application data. A common data structure, partitioned by application, is used to store notes.

The notepad provides a consistent user interface (UI) that enables users to create, edit, view, and delete text-based notes. The Notepad UI is a single component that contains two pages for selecting and maintaining notes, a secondary page for displaying warnings and errors, and a tertiary page for viewing note history. In most cases, you can access the notepad pages when an application page displays the Maintain/View Notes icon.



The Maintain/View Notes icon enables users to access the notepad pages to enter and view notes.

Although the Notepad UI is consistent across all applications, detailed notepad presentation and behavior specific to a given application are defined in a configuration table entry for the application. This entry defines the behavior of the Notepad UI and the keys that are used for the particular application. You can use this configuration table to integrate the notepad pages into applications for which PeopleSoft does not currently deliver Notepad functionality, add Notepad functionality to applications that you build with PeopleTools, or modify the appearance of notepad pages.

Pages Used to Configure and Work with the HR Notepad

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
HR Notepad Configuration - Select Application	HR_NP_CONFIG_HDR	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration	Configure the HR Notepad for use by an application.
HR Notepad Configuration - Configure Keys	HR_NP_CONFIG2	Click the Configure link for an application on the HR Notepad Configuration - Select Application page.	Set up the keys for storing notes.
HR Notepad Configuration - Configure Links	HR_NP_CONFIG3	Click the Configure Links link on the bottom of the HR Notepad Configuration - Configure Keys page.	Configure the links that appear on application note pages.
Note Pad Tester	HR_NP_TEST_API	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Invoke HR Notepad API, Note Pad Tester	Test the notepad configuration.
<application page> Notepad	HR_NP_NOTE_SRCH	Click the Maintain/View Notes icon on an application page.	Access the notepad page to search for and enter notes.
Selected Note	HR_NP_NOTE	Click the Add a New Note button or select the View or Edit this Note link for an existing note on the <application page> Notepad page.	Enter or update a note.
Confirm Delete	HR_NP_MESSAGE	Click the Delete button on the <application page> Notepad page.	Confirm the deletion of a note.

Page Name	Definition Name	Navigation	Usage
Person Search - Simple	HR_PSS_SEARCH	Click the Transfer button on the <application page> Notepad page.	Transfer ownership of the selected note to another person.

Configuring the HR Notepad for Application Use

Access the HR Notepad Configuration - Applications page (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure HR Notepad, HR Notepad Configuration).

HR Notepad Configuration								
Applications								
Object Owner ID	Description	Sub-Id	*Privacy	Allow Deletions	Allow Transfers	Audit	Configure	
HEP	ePerformance Management	E	Private	☒	☒	☐	Configure	
HEP	ePerformance Management	M	Private	☒	☒	☐	Configure	
HHR	Human Resources	JOB	Others can View	☒	☒	☐	Configure	
HHR	Human Resources	MIL	Others can View	☒	☒	☐	Configure	
HHR	Human Resources	SP	Others can View	☒	☒	☐	Configure	
HHR	Human Resources	TPOO	Others can View	☒	☒	☐	Configure	
HHR	Human Resources	WAGE	Others can Edit	☒	☐	☐	Configure	
HWC	Workforce Comp Solutions	MSS	Others can View	☒	☒	☐	Configure	

HR Notepad Configuration - Applications page

Object Owner ID and Description

Select an object owner. The system will display the description of the object owner.

Privacy

Select from these options:

- *Private*: Only the owner of the note can access the note.
- *Others can View*: Anyone can view existing notes in this partition, but only the note owner can update an existing note.
- *Others can Edit*: Anyone can view and edit existing notes in this partition.

Allow Deletions

Select to permit users to delete notes.

- Allow Transfers

Select to permit users who entered and therefore are the owner of a note to transfer ownership of a note to another individual.
- Audit

When selected, this check box enables the Audit Changes feature for the partition. The system will automatically retain a history of all changes made to existing notes, including transfers and deletions.
- Configure

Click to access to the Configure Keys page.

Setting Up Keys for Storing Notes

Access the HR Notepad Configuration - Configure Keys page (click the Configure link for an application on the HR Notepad Configuration page).

HR Notepad Configuration

Owner ID: Human Resources

Sub-Id: JOB

Data

Find | View All | First 1-6 of 6 Last

	Prompt Table	Prompt Field	Key Field Label	Related Display Field	Hide Key	Required	Enterable	Required for Query	Display on Grid
☐	1 PERSON_NAME	EMPLID	Employee ID	NAME_DISPLAY	☐	☒	☐	☒	☒
☐	2 JOB	EMPL_RCD	Empl Rcd Nbr		☐	☒	☐	☒	☒
☐	3 JOB	EFFDT	Effective Date		☐	☒	☐	☒	☒
☐	4 JOB	EFFSEQ	Effective Sequence		☐	☒	☐	☒	☒
☐	5				☐	☐	☐	☐	☒
☐	6				☐	☐	☐	☐	☒

Clear Checked Rows

Select Application

Configure Keys

Configure Links

HR Notepad Configuration - Configure Keys page

This page is for note pad key configuration and consists of six context key rows. Each row in the grid supports one key configuration requirement.

- Prompt Table

Select the table that is used to provide a prompt list and validate the entry when a user enters a value into the key search field in the UI.
- Prompt Field

Select the field within the prompt table that is used to provide the values in the prompt list. You must enter a value in this field if you enter a value in the Prompt Table field.
- Key Field Label

Select the configurable label that will display on the page for this field.
- Related Display Field

Enter the field name for the prompt table that appears in the UI as a related field for the value. This field is optional. If not specified, then there is no related-display field for the context key. For example, you do not usually specify a display field for a date or number context key.

Hide Key	Select to indicate whether this key field is exposed on the UI pages. This field is selected by default.
Required	Select to indicate that this key field is required when adding a note. This field is deselected by default.
Enterable	Select to indicate that the user is permitted to enter a value into this key field in the UI search criteria. This field is selected by default. You might deselect this field in cases which the key is automatically populated by the API and exposed on the UI, but you do not want the user to change it.
Required for Query	Select to indicate that the user must populate the key in the UI search criteria to see the list of notes that meet the search criteria, or to add a new note. This field is deselected by default.
Display on Grid	Select to display the context key value in the list of notes that meet the search criteria. You usually select this check box for any context key that has Required for Query deselected.
Clear Checked Rows	Click this button after you have selected any context key rows for which you want to clear from this configuration. The page will still display the row but the prompt table and field information will be cleared.

Configuring Application Note Page Links

Access the HR Notepad Configuration - Configure Links page (click the Configure Links link on the HR Notepad Configuration - Configure Keys page).

HR Notepad Configuration

Owner ID: Human Resources Sub-Id: JOB

Navigation Link Destinations [Customize](#) | [Find](#) | [1 of 1](#) | [First](#) | [Last](#)

Menu/Bar | **Item/Page** | [Add](#)

*Link Field Name	*Menu Name	*Menu Bar Name

[+](#)

[Select Application](#) | [Configure Keys](#) | [Configure Links](#)

HR Notepad - Configure Links: Menu/Bar tab

Use this page to define the navigation that takes place when the user clicks one of the navigation links at the bottom of the Notepad UI.

- Link Field Name

Select the name of the navigational link. The prompt table for this field is a view of the four navigational fields that are provided on the Note Detail UI. If you do not add a row for a link in the prompt table, the link does not appear on the UI for the application.
- Menu Name

Select the name of the menu to which the user is transferred when they click the link. The prompt table for this field is a view of all menus in the database.
- Menu Bar Name

Select the name of the menu bar to which the user is transferred when they click the link. The prompt table for this field is a view of all menu bars for the menu specified in the Menu Name field.

Access the Item/Page tab on the HR Notepad Configuration - Configure Links page.

HR Notepad Configuration

Owner ID:Human Resources

Sub-Id:JOB

Navigation Link Destinations

Customize | Find | First 1 of 1 Last

Menu/Bar

Item/Page

*Link Field Name	*Menu Name	*Menu Bar Name	
			-
+			

Select Application

Configure Keys

Configure Links

HR Notepad - Configure Links: Item/Page tab

- Link Field Name

Select the name of the navigational link. The prompt table for this field is a view of the four navigational fields that are provided on the Note Detail UI. If you do not add a row for a link in the prompt table, the link does not appear on the UI for the application.
- Bar Item Name

Select the name of the menu bar item to which the user is transferred when they click the link. The prompt table for this field is a view of all items for the menu bar specified in the Bar Name field.
- Panel Item Name

Select the name of the page to which the user is transferred when they click the link. The prompt table for this field is a view of all pages for the bar item specified in the Bar Item Name field.
- Mode

Select the operation mode for the page from the values *Add,Update/Display*, and *Correction*.

Testing the Notepad Configuration

Access the Note Pad Tester page (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Invoke HR Notepad API, Note Pad Tester).

Note Pad Tester

Set Application Context

Object Owner ID:

Sub-Id:

Application Keys

Employee ID:		PERSON_NAME
Empl Rcd Nbr:		JOB
Effective Date:		JOB
Effective Sequence:		JOB

API Method:

Note Pad Tester page

Use this page to test the Notepad configuration for an application and sub-ID, if applicable.

The application keys that appear on this page are the ones that are defined for the Object Owner ID and Sub-Id. When you first access this page, only the Object Owner ID field is enterable. After you enter the Object Owner ID, the Sub-Id field is populated with any valid sub ids for the application. The application keys that appear correspond to the application keys (up to six) that you configure on the HR Notepad Configuration - Configure Keys page.

API Method Select the method to test.

- *Add()*
- *Edit()*
- *InvokeNotepad()*
- *View()*

Execute API Click to execute the API method with the keys you entered.

Accessing the Notepad Page

Access the <application page> Notepad page (click the Maintain/View Notes icon on an application page).



Job Data Notepad

Instructions

Listed below are the notes that have been recorded for the selected Employee ID, Empl Record, Job Effective Date and Job Effective Sequence. New notes can be added, and existing notes can be viewed and/or updated.

Selection Criteria

*Employee ID:

KU0004

Kenneth Grafton

*Empl Rcd Nbr:

0

*Effective Date:

2008-11-10

*Effective Sequence:

0

Notes From:

31

Through:

31

Search

Add a New Note

[Job Data Page](#)

There are no existing notes for the specified search criteria.

[Select All](#)

[Deselect All](#)

Delete

Transfer

[Job Data Page](#)

Example of the Notepad page you access through the Job Data pages

Note. The fields that appear on the notepad page are determined by the notepad configuration.

Selection Criteria

Depending upon the configuration of a page, you may need to select a person to add or view notes. Optionally, enter a Notes From and Through date.

Search Click to view a list of notes that meet the search criteria.

Add New Note Click to access the Selected Note page, where you can create a new note.

Existing Notes

This section displays if there are any notes that meet the search criteria. Click the link in the Subject column to open the Selected Note page and view or edit an existing note.

- Delete

Select one or more listed notes and click this button to remove them from the system.
- Transfer

Select one or more listed notes and click this button to access the Person Search - Simple page to transfer them to another person.

Entering or Updating a Note

Access the Selected Note page (click the Add a New Note button or select the View or Edit this Note link in the Subject column for an existing note on the <application page> Notepad page.

 **Selected Note**

Instructions

You have chosen to enter a new note, or view/update an existing note.

Add Performance Note

Applications

Employee ID:

KU0005

Reza Aliverdi

Created:

07/24/2009 1:49PM

Empl Rcd Nbr:

0

Creator:

Betty Locherty

Effective Date:

2008-11-10

Updated:

Effective Sequence:

0

by:

Subject:

Note Text:

Save

[Return to Note Selection Page](#)

[Job Data Page](#)

Selected Notepad page

Effective Date

The note date for new notes is the effective date that appears on the page. You cannot change the date.

Note. Changing the effective date of the record that is associated with the note does *not* change the note effective date. As a result, the note becomes inaccessible. For example, if you create a note for a job data row with a January 1, 2009 effective date, the note effective date is also January 1, 2009. If you use correction mode to change the effective date of the job data row to January 20, 2009, the note effective date remains unchanged. When you view the notes for the January 20 row of data, you will see only January 20 notes. Without a January 1 row of data, the original note is inaccessible, and users will not see any indication that the original note ever existed.

Subject

Enter the note subject. This entry appears as the link in the Subject column of the notepad page.

Configuring the Text Catalog

To set up the text catalog, use the Configure Text Catalog (HR_SSTEXT_CFG) and Translate Text Catalog (HR_SSTEXT_TEXT) components.

This section provides an overview of the text catalog, lists common elements, and discusses how to:

- Configure the text catalog.
- Designate keys for text catalog entries.
- Define text catalog entries.
- View text catalog entries as HTML.
- Define translation for text catalog entries.
- Test text retrieval.
- View effective dates and context keys for a text ID.

Understanding the Text Catalog

The Text Catalog feature stores standard text that appears on the self-service pages within HRMS applications, including field labels, button names, links, page instructions, and warnings. It also includes the text and subject lines of automated email notifications. HRMS provides predefined text entries, but you can modify them by using the Text Catalog feature.

Entries in the Text Catalog feature are context-sensitive, meaning that a particular piece of text on a page can vary depending upon the page's usage or context. In this way, For example, instructional messages that appear for managers can differ from the messages that appear for workers.

Text Catalog Keys

Context-sensitivity is accomplished through the use of keys that enable the application to retrieve applicable text catalog entries. The keys for each application differ to meet the needs of the application.

Although you can have multiple versions of the same text, you do not have to set up a separate entry for every possible scenario. You can create one generic entry where all key values are blank, and then add entries for the situations that vary from the norm. Blank key values function as wildcards.

Warning! When the system looks for a match, it stops searching if the search keys narrow the possible choices to a single row—the lower-order search keys are ignored. If you do not set things up correctly, the system may return the wrong results. Plan ahead before making changes, particularly for complex scenarios. Random changes can lead to errors that are difficult to debug later.

You can test changes by using the Test Text Catalog page. To test an entry, enter the text ID that is associated with the text, plus any combination of key values, and click the Test button to view the text that the system retrieves for the keys values you entered.

Text IDs

To update a text entry, you need its ID. Use the Display Text ID option on the Configure page to find this information. When you activate this option, the text IDs appear in place of the corresponding text on self-service pages, warnings, and emails.

To view the correct text IDs, you need to create the conditions that cause the page, warning, or email to appear. For example, you might need to sign in using a particular role.

Note. You may want to activate this option, print a copy of the self-service pages, and then deactivate it. This provides a hardcopy reference of all the text IDs used on each self-service page.

Common Elements Used in this Section

Text ID	The unique identifier that you entered to access entries in the text catalog.
Usage	The place where the entry is used: <i>Email Body, Email Subject, Error/Warning, Field Label, Grid/Scroll Heading, Groupbox Title, Hyperlink/Button, Page Instructions, or Page Title</i> . The only text entries that you cannot modify are translate values and error messages that appear in Windows error boxes. You can use this field to search the Maintain Text Catalog page when you don't have the text ID, but you do have the specific text.
Effective Date	The date on which a particular text catalog entry becomes active. Delivered text is defined as system data in the PeopleSoft HRMS database and has an effective date of January 1, 1900.
	Important! To prevent future updates to PeopleSoft ePerformance from overwriting any text entries that you add or modify, use a later effective date when you add new text entries, and insert a new effective date when you modify delivered text.

Pages Used to Work with the Text Catalog

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Configure Text Catalog: General	HR_SSTEXT_CFG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog, General	Configure the text catalog for an application.
Configure Text Catalog: Key 1 Configure Text Catalog: Key 2 Configure Text Catalog: Key 3 Configure Text Catalog: Key 4 Configure Text Catalog: Key 5 Configure Text Catalog: Key 6	HR_SSTEXT_CFG	Select the Key 1,Key 2,Key 3,Key 4,Key 5, or Key 6 tab on the Configure Text Catalog page.	Designate keys that are used to store and retrieve text catalog entries.
Maintain Text Catalog	HR_SSTEXT_TEXT	- Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog - Set Up HRMS, Product Related, ePerformance, Text Catalog, Maintain Text Catalog, Maintain Text Catalog	Define text catalog entries, and define the values for context-sensitive keys.
Maintain Text Catalog - HTML View	HR_SSTEXT_HTML	Click the View/Edit as HTML link on the Maintain Text Catalog page.	View text catalog entries as HTML.
Text Catalog - View All Keys	HR_SSTEXT_ALLKEYS	Click the View all effective dates and context keys for this Text ID link on the Maintain Text Catalog page or the Test Text Catalog page.	View versions and context-key entries for a particular text ID and effective date combination by clicking the view keys link for the desired effective date.
Translate Text Catalog - Descriptions	HR_SSTEXT_LANG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Translate Text Catalog, Descriptions	Select and describe the languages into which a text catalog entry is translated.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Translate Text Catalog - Catalog Text	HR_SSTEXT_LANG2	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Translate Text Catalog, Catalog Text	Enter translations for text catalog entries
Test Text Catalog	HR_SSTEXT_TEST	Set Up HRMS, Product Related, ePerformance, Text Catalog, Test Text Catalog, Test Text Catalog	Test the text retrieval for a text ID, using any combination of key values.

Configuring the Text Catalog

Access the Configure Text Catalog page: General tab (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog, General).

Configure Text Catalog

Applications

General
Key 1
Key 2
Key 3
Key 4
Key 5
Key 6
[...]

Object Owner Identifier	Description	Sub ID	Description	Display Text Id	
HBN	Base Benefits	ELCT	BN_ELECT Application	☐	
HCSC	HCM Shared Component	AWE	Approval Workflow Eng	☐	
HCSC	HCM Shared Component	HCDL	Delegation	☐	
HCSC	HCM Shared Component	PH	Page Help	☐	
HEB	eBenefits			☐	
HEP	ePerformance Management		Performance	☐	
HEP	ePerformance Management	D	Developmental	☐	
HEP	ePerformance Management	O	Objectives	☐	
HGA	Absence Management		Absence Management	☐	
HGA	Absence Management	AMEA	Extended Absence	☐	
HGA	Absence Management	LVDN	Leave Donation	☐	
HHR	Human Resources	ATT	Attachments	☐	
HHR	Human Resources	CP	Career Planning	☐	
HHR	Human Resources	DRPT	Direct Reports	☐	
HHR	Human Resources	I9	I9 Module	☐	

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Configure Text Catalog page: General tab

Use this page to add or remove applications from the text catalog and to configure options that affect the operation of the text catalog within an application. The page shot above shows the PeopleSoft HCM applications that are delivered with the text catalog feature enabled.

Object Owner Identifier and Description Select an object owner. The system will display the description of the object owner.

Display Text Id Select to have the system identifiers of the text entry appear instead of the corresponding text. You can use this option to find out which text ID corresponds to a particular piece of text that you want to modify.

Designating Keys for Text Catalog Entries

Access any of the Key 1-6 tabs on the Configure Text Catalog page.

Note. The Key 2, Key 3, Key 4, Key 5, and Key 6 tabs are identical in appearance and usage to the Key 1 page (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog and access the appropriate key tab).

Configure Text Catalog

Applications

General Key 1 Key 2 Key 3 Key 4 Key 5 Key 6

Object Owner Identifier	Description	Sub ID	Key 1 Prompt Table	Key 1 Field Name	
HBN	Base Benefits	ELCT	PLN_CATEGORY_VW	DESCR	-
HCSC	HCM Shared Component	AWE			-
HCSC	HCM Shared Component	HCDL	HR_DR_PNLGRP_VW	PNLGRPNAME	-
HCSC	HCM Shared Component	PH	HR_PH_FIELD_VW	FIELDNAME	-
HEB	eBenefits		BEN_DEFN_PGM	BENEFIT_PROGRAM	-
HEP	ePerformance Management		EP_SECTION_DEFN	EP_SECTION_TYPE	-
HEP	ePerformance Management	D	EP_SECTION_DEFN	EP_SECTION_TYPE	-
HEP	ePerformance Management	O	EPO_HIER_MTH_VW	EPO_HIERARCHY_MT	-
HGA	Absence Management		GP_COUNTRY	COUNTRY	-
HGA	Absence Management	AMEA	GP_COUNTRY	COUNTRY	-
HGA	Absence Management	LVDN	GP_COUNTRY	COUNTRY	-
HHR	Human Resources	ATT	HR_ATT_00_VW	OBJECTOWNERID	-
HHR	Human Resources	CP	HR_CP_PNLGRP_VW	PNLGRPNAME	-
HHR	Human Resources	DRPT	HR_DR_PNLGRP_VW	PNLGRPNAME	-
HHR	Human Resources	I9			-

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Configure Text Catalog page: Key 1 tab

**Key 1 (2, 3, 4, 5, or 6)
Prompt Table**

Select the object name of the prompt table that defines the values by which the text catalog is partitioned for an application.

The values in this prompt table appear when a text catalog entry is defined and modified. You select the value that pertains to the context in which the entry appears on self-service pages or notifications.

**Key 1 (2, 3, 4, 5, or 6)
Field Name**

Select the field in the prompt table that contains the value that appears in the prompt list for this key.

Note. If you enter a value for the prompt table, you must also enter a value for the field name in the same row.

Defining Text Catalog Entries

Access the Maintain Text Catalog page (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog).

The screenshot displays the 'Maintain Text Catalog' page. At the top, it shows 'ePerformance Management' and 'Sub ID:'. Below this, the 'Text ID' is 'APPR_MAIN1_CMPPB' and the 'Usage' is 'Hyperlink/Button'. The 'Description' field contains 'Maintain Performance Review Page 01 - Complete for Employee push button text'. A 'Text Entries' section is visible, showing 'Effective Date: 01/01/1900'. Below this, the 'Context Keys and Text' section includes fields for 'Section Type', 'Author Type' (set to 'E'), 'User Role', and 'Document Status' (set to 'IP'). A large text box contains the word 'Complete'. At the bottom, there is a link 'View/Edit as HTML' and a footer link 'View all effective dates and context keys for this Text ID'.

Maintain Text Catalog page

Context Keys and Text

The context keys that appear on this page are determined by the text catalog configuration for the application, which will display up to six keys. Use the context keys to target the message or text to a particular audience or specify the conditions under which the text is appropriate.

Note. A blank value for any key is a wildcard and means that the entry appears in all contexts of the key.

For example, the page shot above shows a configuration of a button for the ePerformance application. The button text that is defined in the text box applies only to the author type of employees (*E*) and only when the document status is in progress (*IP*).

For each text ID and effective date combination, define a complete wildcard entry in which you leave all key fields blank. This entry, known as the root entry, is the default text entry that's used when no section type, author type, user role, or document status is specified.

View/Edit as HTML Click to view and edit the HTML tags if the text will appear in an HTML area on the page.

Text Substitution

The text strings that are substituted for specific tokens, such as %1 and %2, are different for each application that uses substitution in the text catalog. They are delivered with the application.

Token substitution in the text catalog works in the same way as in the PeopleTools Message Catalog. You supply the values for the tokens in a PeopleCode function call at runtime. The values are replaced by parameters in the PeopleCode when the text is rendered on performance documents. To use this feature, you must know PeopleCode.

If you want to update the delivered text IDs such that the substitution tokens take on a different meaning or are resequenced, you also need to make corresponding changes to the PeopleCode that calls the text catalog feature retrieval functions, since this copies supplier values to use in place of the tokens.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

Viewing HTML for Text Catalog Entries

Access the Maintain Text Catalog - HTML View page (click the View/Edit as HTML link on the Maintain Text Catalog page).

Maintain Text Catalog

Text

Complete

Keep Changes Cancel Changes Refresh HTML View

Text Style: [dropdown]

HTML View

Complete

Maintain Text Catalog - HTML View page

Text Style

Select the style to apply to the text. After you apply a style (for example, *Bold* or *Error* to a text entry, the HTML View page region shows how the text will appear on self-service pages.

Viewing Effective Dates and Context Keys for a Text ID

Access the Text Catalog - View All Keys page (click the View all effective dates and context keys for this Text ID link on the Maintain Text Catalog page or the Test Text Catalog page).

Text Catalog - View All Keys

ePerformance Management Sub ID:

Text ID: APPR_MAIN1_CMPPB

Versions		Keys					
Effective Date	view keys	Key 1	Key 2	Key 3	Key 4	Key 5	Key 6
01/01/1900	view keys	<blank>	E	<blank>	<blank>	<blank>	<blank>
		<blank>	M	<blank>	<blank>	<blank>	<blank>

[Return](#)

An entry with all keys set to blank (wildcard) defines the default entry that will be used if no match can be found for the context keys. Text IDs with a missing "wildcard" entry may cause unwanted results when text is retrieved from the Text Catalog.

Text

Text Catalog - View All Keys page

The Versions group box lists all effective-dated versions of the selected text ID.

Click the view keys link to list each set of context keys that is associated with the selected version. Click the language link to view the text that is associated with the context keys for the indicated language.

Translating Text Catalog Entries

Access the Translate Text Catalog - Descriptions page (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Translate Text Catalog, Descriptions).

DescriptionsCatalog Text

Object Owner ID: ePerformance ManagementSub ID:

Effective Date: 01/01/1900

Text ID: ADHOC-NOM-BDYUsage: Email Body

Description: Email body for adhoc notification for nominations

[Add New Language](#)[Collapse all Languages](#)[Expand All Languages](#)

Text ID Descriptions

▼ French

Language Code: French

Description:

Translate Text Catalog - Descriptions page

Use this page to view a text catalog entry and the languages into which it is translated. The Collapse all Languages and Expand All Languages enable you to control the way the list of languages appears. You can add and remove languages on this page, but you cannot enter translation text.

Catalog Text

Access the Translate Text Catalog - Catalog Text page Set Up HRMS, Common Definitions, Text Catalog and Notepad, Translate Text Catalog, Catalog Text).

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Descriptions

Catalog Text

Object Owner ID:

ePerformance Management

Sub ID:

Effective Date:

01/01/1900

Text ID:

ADHOC-NOM-BDY

Usage:

Email Body

Description:

Email body for adhoc notification for nominations

Text Entries

Find | View All | First 1 of 1 Last

Text:

This is an adhoc notification regarding nominations that has been sent for %1 document.
%7

Add New Language

Collapse All Languages

Expand All Languages

Translations

French

*Language Code:

French

Text:

Translate Text Catalog - Catalog Text page

Use this page to enter translations into the text catalog. The Collapse all Languages and Expand All Languages enable you to control the way the list of languages and translation entries appears. You can add and remove languages on this page and view the text you are translating.

Testing Text Retrieval

Access the Test Text Catalog page (Set Up HRMS, Product Related, ePerformance, Text Catalog, Test Text Catalog).

Test Text Catalog

Set Application Context

Object Owner ID: ePerformance Management

Sub ID:

Text ID:

Effective Date:

[View all effective dates and context keys for this Text ID](#)

Language Code:

Context Keys

Section Type:

Author Type:

☐ Use Cache

User Role:

Document Status:

Substitution Text and Style

Substitute Text 1:

Substitute Text 2:

Substitute Text 3:

Substitute Text 4:

Substitute Text 5:

Text Style:

"Best Fit" Text

Complete Performance Criteria

Test Text Catalog page

This page enables you to enter parameters for testing how the entries in the text catalog appear on self-service pages, given a set of parameters that you enter.

To test the text retrieval:

1. Enter the text ID for the text.
2. (Optional) Enter values for any key fields. The content keys that appear correspond to the application keys (up to six) that you configure on the HR Notepad Configuration - Configure Keys page.
 - If you leave all key fields blank, the system returns the root text when you click the Test button.
 - If you enter values for key fields, the system searches for the text with the best fit.
3. (Optional) Enter values in one or more of the Substitution Text fields.

When you click the Test button, the system replaces the variable (%1, %2, %3, %4, and %5) in the text entry with the value that you enter here.

4. (Optional) Select a text style to see the returned text rendered in a particular HTML style.

This features helps you visualize how the text appears on the self-service page. Values are *Add'l Inst* (additional instructions), *Bold*, *Error*, *Page Inst* (page instructions), and *Page Title*.

5. Click the Test button.

The text entry that best matches the search criteria and context keys for the selected text ID appears.

Configuring Attachments

To configure attachments, use the Define Authorization (HR_ATT_AUTH), Define Authorization Entries (HR_ATT_AUTH_ENT), Define Attachments (HR_ATT_CNFG), Configure Keys (HR_ATT_KEYS_DFN), and Maintain Definitions (HR_ATT_DEFN) components.

This section provides an overview of attachments and discusses how to:

- Define attachment authorizations
- Define authorization entries
- Define attachment configuration IDs.
- Map data fields to context keys.
- Configure context keys.
- Configure store keys.
- Maintain definitions.
- Implement the attachment framework.

Understanding Attachments

The attachment feature enables you to attach files, notes, and URLs to a PeopleSoft Enterprise application. An administrator can add URLs, common notes, and files to a component or page and enable others to view, download and edit the attachments. Attachments include notes, PDF files, spreadsheet files, document files, URLs, and so on. You can also define the types of attachments that users can add to a specific row of application data, such as medical or adoption certificates, fitness for duty forms, and so on.

Although the types of attachments you can add to a page are essentially unlimited, attachments are categorized as one of the following:

- Attachments are any previously created electronic file that the administrator wants users to be able to download.
- URLs are links to dynamic files or web sites.
- Notes are free-form text that the user can enter through the attachment page in the PeopleSoft application.

Note. Only attachments and URLs are defined on the Define Attachments page. Notes are created by the user through the attachment pages of the PeopleSoft application.

Note. The Define Attachments page enables an administrator to create document definitions, as well as attachments and URLs. Document definitions are types of files that users can upload to the system. For example various medical certificates or evidence of class completion.

Since many uploaded attachments should not be visible to all users, the system enables an administrator to restrict access to the attachments. The administrator uses roles to define who can add, modify or delete their own attachments for a specific row of application data.

Adding Attachments to Applications Process Flow

Here are the steps for defining attachments to use in PeopleSoft Enterprise applications:

1. Define attachment Authorization IDs

Specify the authorization level access required to edit or view attachments.

2. Define Authorization Entry IDs

For each attachment you plan to establish, specify the attachment object type, Attachment, Note, or URL, and the user roles that can access the attachment. Specify the access level of each user role by assigning an Authorization ID to the role.

3. Define attachment configuration IDs

Add common attachments, URLs, or document definitions and the roles that can see the attachments.

4. Configure keys

Integrate attachments into any application within any context. After defining the attachments, you can integrate them into any PeopleSoft Enterprise application and the context varies depending on the product that uses the framework. The Configure Keys page enables you to define which application data field maps to each of the required context keys.

a. Configure context keys

Context keys are populated with values corresponding to a field in the associated application. To define the contextual variations, define contextual key prompt tables or views and key prompt fields based on the application using the attachment framework. These keys can come from any number of tables and are implemented as generic character fields that are defined as record keys in the data structure at the application level to denote alternate configuration IDs that can be used under different circumstances.

b. Configure store keys

For attachment configuration IDs that are document definitions, you must create a store record to launch the document definition and store the attachments added by a user to a specific row of application data.

Define store keys for document definitions in order to differentiate the row of data to which the attachment belongs. Each application can decide the number of keys to use, from 1 to N, creating its own record plus a sub record in Application Designer to store common fields related to the attachments. Once the store record has been created, it must be associated to the Object Owner ID and Sub ID to automatically retrieve the key field definitions and select the store key labels.

After creating the store record, associate it to the Object Owner ID and Attachment Sub ID and then select the field labels. When you enter the name of the store record definition, the key fields are automatically retrieved in the correct order by the key position defined in the record.

5. Maintain definitions

The system retrieves a list of valid Configuration IDs based on the defined context keys. In addition, the system uses the Definition ID and the effective date to choose the attachment from the database.

6. Implement the attachment framework

To implement the attachment framework use the application class methods in the HR_ATTACHMENTS application package PeopleSoft delivers. There are two classes in the delivered application package. The Attachment_Data application class enables you to create an object containing entries for all of the link labels, configuration IDs and group boxes that contain the links to the defined attachments. The Attachment_UI application class enables you to manage the user interface for the attachments.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Developer's Guide

Enterprise PeopleTools PeopleBook: PeopleCode API Reference

Pages Used to Configure Attachments

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Authorization	HR_ATT_AUTH	Set Up HRMS, Common Definitions, Attachments, Define Authorization, Define Authorization	Enter and maintain attachment authorization IDs which specify the level of user access for attachments.
Define Authorization Entries	HR_ATT_AUTH_ENT	Set Up HRMS, Common Definitions, Attachments, Define Authorization Entries, Define Authorization Entries	Associate attachment authorizations with user roles.
Define Attachments	HR_ATT_CNFG	Set Up HRMS, Common Definitions, Attachments, Define Attachments, Define Attachments	Associate attachments and their authorizations and create links on the page displayed in the target application.
Configure Keys	HR_ATT_KEYS_HDR	Set Up HRMS, Common Definitions, Attachments, Configure Keys, Configure Keys	Define the prompt tables and key fields used by an application.
Attachments Context Keys	HR_ATT_KEYS_C	Click the Context Keys link on the Configure Keys page	Enter content key prompt values.
Attachments Store Keys	HR_ATT_KEYS_S	Click the Store Keys link on the Configure Keys page	Enter store key values.
Maintain Definitions	HR_ATT_DEFN	Set Up HRMS, Common Definitions, Attachments, Maintain Definitions, Maintain Definitions	Specify the attachment types available to an application. The context keys that appear on this page are determined by the Configure Keys component and are used to retrieve a list of valid Configuration IDs.

Defining Attachment Authorizations

Access the Define Authorization page (Set Up HRMS, Common Definitions, Attachments, Define Authorization, Define Authorization).

Define Authorization

Authorization ID: K0W_EDITALL

Authorization Details

*Description: K0W_EDITALL

Short Description: K0W_EDAL

Comments: Edit Attachments, Notes, URLs

Authorization Options

☒ Edit Attachments	☒ View Attachments	Delete Options ☒ Mark as deleted ☐ Delete from database
☒ Edit Notes	☒ View Notes	
☒ Edit URLs	☒ View URLs	

Define Authorization page

Authorization Options

Edit Attachments Select the check box to enable the user to create, update, or delete attachments. The system automatically selects the View Attachments check box when you select the Edit Attachments check box and save the page.

View Attachments Select to enable users to view attachments.

Edit Notes Select the check box to enable the user to create, update, or delete notes. The system automatically selects the View Notes check box when you select the Edit Notes check box and save the page.

View Notes Select to enable users to view notes.

Edit URLs Select the check box to enable the user to create, update, or delete URLs. The system automatically selects the View URLs check box when you select the Edit URLs check box and save the page.

View URLs Select to enable users to view URLs.

Delete Options

Select an option to determine the action of the system when the user deletes a existing attachment, note, or URL. Selecting Mark as Deleted, the system still lists the object as an attachment, but the object's status is *Deleted* and it cannot be selected. This option enables you to track deleted attachments. Selecting Delete from database completely removes the object from the database.

Note. The options in this group box are not available unless one or more of the editing fields, Edit Attachments, Edit Notes, or Edit URLs, are selected.

Defining Authorization Entries

Access the Define Authorization Entries page (Set Up HRMS, Common Definitions, Attachments, Define Authorization Entries, Define Authorization Entries).

Define Authorization Entries

Entry ID: K0W_BIRTH

Entry Definitions

Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1990

*Description: Birth Certificate

Short Description: Birth Cert

Comments: Birth certificate will be posted

Entry Control

☒ Attachments

☒ Notes

☐ URLs

Define Authorization

Customize | Find | View All | 1-3 of 3 Last

	*Role Name	Description	*Authorization ID	Description	
1	AM EA Administrator	AM EA Administrator	K0W_EDITALL	K0W_EDITALL	+ -
2	Employee	[WF] Employee	K0W_EDITALL	K0W_EDITALL	+ -
3	Manager	Manager	K0W_VIEWATT	K0W_VIEWATT	+ -

Define Authorization Entries page

Attachments, Notes, and URLs

Select to allow the Role Names listed in the Define Authorization area to create attachments, notes, or URLs based on the specified Authorization ID. You must select at least one of the options in the Entry Control region.

Define Authorization

Use the fields in the Define Authorization region to specify the operations a role can perform by associating a role with an attachment Authorization ID. Select the Role Name and then select a valid Authorization ID in each row. Only one Authorization ID can be assigned to each role, but multiple roles can share the same Authorization ID.

Defining Attachment Configuration IDs

Access the Define Attachments page (Set Up HRMS, Common Definitions, Attachments, Define Attachments, Define Attachments).

Define Attachments

Configuration ID: K0W_CERT_LNK

Attachment Configuration Details Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1990  *Effective Status: Active   

*Description: Certificates Short Description: Certificat

Comments: Adoption and Birth certificates will be posted here 

*Attachment Type: Document Definition 

Document Definitions		Customize Find View All  First 1-2 of 2 Last	
*Entry ID	Description		
1 K0W_ADOPTCERT 	Adopt Certificate		
2 K0W_BIRTH 	Birth Certificate		

Last Upd User: SAMPLE Updated on: 04/10/09 5:21:36AM

Define Attachments page

Description

Enter a description for the Configuration ID. This description appears in the group boxes as a label for the link to the attachment.

Attachment Type

Select the type of attachment users can attach or access. Values are: *URL*, *Attachment*, and *Document Definition*. Based on your selection, the remainder of the fields on the page change.

Select either *Attachment* or *URL* if you want to define common attachments or URLs such as policies, handbooks, FAQs, and so on. Select *Document Definition* if you want to create an entry that enables users to create their own attachments for a specific row of application data.

Attachment

Enter the file name of the attachment and then click the Add Attachment button. After uploading the file, this field displays the file name of the attachment. You can then use the View Attachment and Delete Attachment buttons to manage the content of the attachment. This field is visible only if the Attachment Type is *Attachment*.

URL

Enter the desired URL to attach as a link. This field is visible only if the Attachment Type is *URL*.

Add Attachment

Click to add the file listed in the Attachment field. This button is visible only if the Attachment Type is *Attachment* and a file has not yet been uploaded.

View Attachment and Delete Attachment

Use these buttons to manage the content of the file listed in the Attachment field. These buttons are visible only if the Attachment Type is *Attachment* and a file has been uploaded.

Authorized Roles

Enter the roles that you want to have access to the attachment or URL. If no role is selected, all of the available roles can see the link. This region is only visible if the Attachment Type is *Attachment* or *URL*.

Role Name Select the role that you want to access the specified attachment.

Document Definitions

Enter the list of defined authorization entries that the user can upload as an attachment. The Document Definitions region is visible only if the Attachment Type is *Document Definition*.

Entry ID Select the authorization entry that you want users to upload to the system. The system lists the Authorization Entry IDs defined on the Define Authorization Entries page.

Last Upd User (Last Updated User) Displays the user name that last updated the Define Attachments page.

Updated on Displays the date the Define Attachments page was last updated.

Mapping Data Fields to Context Keys

Access the Configure Keys page (Set Up HRMS, Common Definitions, Attachments, Configure Keys, Configure Keys).

Configure Keys							
Applications				Customize Find First 1-3 of 3 Last			
	*Object Owner ID	Description	*Sub Id	Description	Context Keys	Store Keys	
1	HGA	Absence Management	AMEA	Absence Management	Context Keys	Store Keys	
2	HRAM	RS Applicant Manager	JOFF	Job Offer Atchments w Setid	Context Keys	Store Keys	
3	HWCS	Workforce Comp Solutions	ALRT	Compensation Alerts	Context Keys	Store Keys	

Configure Keys page

Object Owner ID Enter the application in which a common component is used.

Sub ID (Sub application ID) Enter a sub-application ID. Use the Sub ID field to create a definition for multiple lines of features within a single product line.

Context Keys Click to open the Attachments Context Keys page.

Store Keys Click to open the Attachments Store Keys page.

Configuring Context Keys

Access the Attachments Context Keys page (click the Context Keys link on the Configure Keys page).

Attachments Context Keys

Object Owner ID: HGA

Sub Id: AMEA

Description: Absence Management

Context Keys

Customize | Find | First 1-2 of 2 Last

Prompt Fields

Related Fields

*Sequence	*Key Prompt Table	*Key Prompt Field	*Field Label Key		
10	GP_COUNTRY	COUNTRY	Country	+	-
20	GP_PIN_NM_VW	PIN_NM	Absence Element	+	-

Attachments Context Keys page

- Sequence

Specify the order of the context keys on the Maintain Definitions page.
- Key Prompt Table

Select the object name of the prompt table that defines the values by which attachments are partitioned for a an application.
- Key Prompt Field

Select the prompt table field that contains the value in the prompt list for a specified key.
- Field Label Key

Select the label in the prompt table.

Related Fields

Click the Related Fields tab to select the fields related to the key prompt table and key prompt field by row.

Configuring Store Keys

Access the Attachments Store Keys page (click the Store Keys link on the Configure Keys page).

Attachments Store Keys

Object Owner ID: HGA

Sub Id: AMEA

Description: Absence Management

Record (Table) Name: GP_ABS_ATTACH

Store Keys					
Seq Nbr	Prompt Table	Prompt Field	*Field Label	Hide Key	Display on Grid
1	GP_ABS_ATTACH	EMPLID	EmpID	☐	☒
2	GP_ABS_ATTACH	EMPL_RCD	Employee Record Number	☐	☒
3	GP_ABS_ATTACH	TRANSACTION_NBR	Transaction Number	☐	☒

Attachments Store Keys

- Hide Key

Select to indicate whether the key is displayed on the Document Definition page.
- Display on Grid

Select to indicate whether the key field is displayed on the Document Definition Header page

Maintaining Definitions

Access the Maintain Definitions page (Set Up HRMS, Common Definitions, Attachments, Maintain Definitions, Maintain Definitions).

Maintain Definitions

Object Owner ID: HGA

Sub Id: AMEA

Definition

*Effective Date: 01/01/1990

*Status: Active

Context

*Sequence Number: 1

Key Field	Key Value	Key Date	Key Number	All values
1 Country	CYM			☐
2 Absence Element				☒

Attachments

*Configuration ID	*Sequence	*Group Box
1 KOW_FAQ_LNK	1	Related

Maintain Definitions page

Key Field	Displays the list of context keys specified on the Attachments Context Keys page.
Key Value, Key Date, and Key Number	Select a valid value for the specified key field. The available field depends upon the Key Field type. For example, Cycle ID is a CHAR type field, so the Key Value field is available and the Key Date and Key Number fields do not allow you to enter data. The Budget Period Start Date is a DATE type field, which means the Key Datefield is available and the Key Value and Key Number fields do not allow you to enter data. None of these fields are available when the All Values check box is selected.
All Values	Select to specify that any value for the specified key field is valid. Selecting this field makes the Key Value field unavailable.

Attachments

Configuration ID	Select a valid configuration ID. Only active attachment configuration IDs are displayed.
Sequence	Enter a number to specify the order in which the hyperlinks to attachments are retrieved from the database.
Group Box	Select the group box where the hyperlink label is displayed. Values are: <i>Related Links</i> , <i>Other Links</i> , and <i>None</i> .

Note. The context keys are not displayed the first time you open the Maintain Definitions page. You must enter the Sequence Number and then the context keys automatically display.

Implementing the Attachment Framework

Implement the attachment framework using the application class methods in the HR_ATTACHMENTS application package PeopleSoft delivers. There are two classes in the delivered application package. The Attachment_Data application class enables you to create an object containing entries for all of the link labels, configuration IDs and group boxes that contain the links to the defined attachments. The Attachment_UI application class enables you to manage the user interface for the attachments.

Attachment_Data Application Class GetAttachmentLink Method

The GetAttachmentLink method uses the effective date and the context keys array to retrieve the configuration IDs from the database. Then these entries are loaded into a standalone rowset for further filtering by role name.

The GetAttachmentLink method accepts these parameters:

<i>Input Parameter</i>	<i>Description</i>
&EffDt	Specify the effective date as a date.

<i>Input Parameter</i>	<i>Description</i>
&Ckeys	Specify the context key values as an array of strings. The values must be in the same order as defined on the Context Key page.
%UserID	(Optional) Use the system variable to specify the current user.
%Component	(Optional) Use the system variable to specify the component invoking the attachment framework.
&Roles	(Optional) Specify the roles as an array of strings.

The method returns an array object that contains entries for all link labels, configuration IDs, and group boxes to which the current user has access.

There are two options to discover or retrieve the current user's roles, depending on the values passed of &Roles, %Component, or %UserID:

1. The system uses the %UserId and %Component variables to discover all of the valid role names for each content reference and user ID in order to perform the filtering.
2. Using the &Roles array of strings, only the role names in the array are considered for filtering.

Note. You must choose one of these options in order to perform further filtering by role name. The system automatically uses the &Roles array of strings if you pass all three parameters at the same time.

Attachment_Data Application Class SameAttachmentSetup Method

The SameAttachmentSetup method accepts these parameters:

<i>Input Parameter</i>	<i>Description</i>
&EffDt	Specify the effective date as a date.
%UserID	(Optional) Use the system variable to specify the current user.
%Component	(Optional) Use the system variable to specify the component invoking the attachment framework.
&Roles	(Optional) Specify the roles as an array of strings.
&cKeys	Specify the current context key values as an array of strings.
&oKeys	Specify the prior context key values as an array of strings. This is the value of the field the last time the component was saved.

The method returns a boolean value (True/False).

The system uses the `&EffDt` and `&cKeys` to retrieve the Configuration IDs using the current context keys values. The system uses the `&EffDt` and `&oKeys` to retrieve the Configuration IDs using the context keys values from the last time the component was saved. Using the `%UserId` and `%Component` system variables the system discovers all of the valid role names for each content reference and user ID in order to perform the filtering. Using the `&Roles` array of strings only the role names that are in the array are considered for the filtering. Then these entries are loaded into arrays for comparison. If the current Configuration IDs are the same as the prior Configuration IDs, then the method returns the value `True`. If the return is `True`, the product that intends to implement this functionality has the option to delete the invalid attachments or leave them in the database.

Attachment_UI Application Class Attachment_UI (Constructor) Method

The statements contained in this method provide the initialization of the class and instantiates new objects of the `Attachment_UI` class.

The `Attachment_UI (Constructor)` method accepts these parameters:

<i>Input Parameter</i>	<i>Description</i>
<code>&tOwrId</code>	(Optional) Specify the Text Catalog Object Owner ID.
<code>&tSubId</code>	(Optional) Specify the Text Catalog Attachment Sub ID.
<code>&OwrId</code>	Specify the Object Attachment Owner ID.
<code>&SubId</code>	Specify the Object Attachment Sub ID.

No return parameters are available.

Attachment_UI Application Class GetAttachmentType Method

The Configuration ID and the Effective Date are used to retrieve the attachment type from the Attachment Configuration Table (`HR_ATT_CNFG_TBL`.)

The `GetAttachmentType` method accepts these parameters:

<i>Input Parameter</i>	<i>Description</i>
<code>&CnfgId</code>	Specify the hyperlink Configuration ID.
<code>&EffDt</code>	Specify the Effective Date as a date.

The method returns the attachment type as one of the following string values:

- `<001>` for a URL attachment type.
- `<002>` for an ATTACHMENT attachment type.
- `<003>` for a DOCUMENT DEFINITION attachment type.

Note. Only type 003 attachment types can be edited.

Attachment_UI Application Class OpenAttachment Method

The system uses the Configuration ID value (&hCnfgID) and the Effective Date (&hEffDt) to retrieve the attachment type from PS_HR_ATT_CNFG_TBL using the GetAttachmentType method. If the attachment type is *Attachment* or *URL* then the specified attachment file or URL is opened in a new window. Otherwise, the user is transferred to the Attachment User Interface – (Component: HR_ATT_DD). To enable the user to open the component ensure that the corresponding store key record and store key field labels are defined.

The OpenAttachment method accepts these parameters:

<i>Input Parameter</i>	<i>Description</i>
&tOwrId	(Optional) Specify the Text Catalog Object Owner ID.
&tSubId	(Optional) Specify the Text Catalog Attachment Sub ID.
&OwrId	Specify the Object Owner ID.
&SubId	Specify the Object Attachment Sub ID.
&hCnfgID	Specify the hyperlink Configuration ID (use the value that the GetAttachmentLinks method returns in the array).
&hEffDt	Specify the effective date.
%UserID	Use the system variable to specify the current user.
&sKeys	Specify the Store Keys values as an array of strings.
&hRole	Specify the Role Name (use the value that the GetAttachmentLinks method returns in the array).
&dOnly	Specify <i>true</i> or <i>false</i> . <i>True</i> specifies display only mode. <i>False</i> uses the attachment setup.

The method returns a numeric value that indicates the number of successfully added attachment records.

Attachment_UI Application Class DelAttachments Method

The DelAttachments method accepts these parameters:

<i>Input Parameter</i>	<i>Description</i>
&EffDt	Specify the effective date as a date.
&Ckeys	Specify the context key values as an array of strings.
&Roles	(Optional) Specify the roles as an array of strings.
%Component	(Optional) Use the system variable to specify the component invoking the attachment framework.

<i>Input Parameter</i>	<i>Description</i>
%UserID	(Optional) Use the system variable to specify the current user.

The method returns an array that contains entries for all of the hyperlink labels, Configuration IDs and group boxes that the current user can access.

Attachment_UI Application Class ExistAttachments Method

The ExistAttachments method accepts these parameters:

<i>Input Parameter</i>	<i>Description</i>
&OwrId	Specify the Object Attachment Owner ID.
&SubId	Specify the Object Attachment Sub ID.
&hEffDt	Specify the effective date as a date.
&hkeys	Specify the Store Keys values as an array of strings.

The method returns a boolean value (True/False).

Delivered Text Catalog Entries

The steps to view delivered text catalog entries for attachments are:

1. Navigate to the Maintain Text Catalog page. (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog)
2. Enter HHR in the Object owner identifier field and ATT in the Sub ID field.
3. Click Search to view the list of text catalogs for attachments.

Chapter 36

(USF) Working With Mass Organization Changes

This chapter provides an overview of mass organization changes and discusses how to perform mass organizational changes.

Understanding Mass Organization Change

Governmental changes and mandates might require making the same organizational change to a large group of your PeopleSoft Human Resources records. For example, an agency restructuring may require that you transfer a group of employees from the Office of the Director, Budget Division to the Office of the Director, Account Standards Division. Instead of performing this transfer manually, record by record, you can make the changes all at once using the Mass Organization Change functionality.

The Mass Organizational Change processes enable you to make changes based on department and position changes. Using the Mass Organization Changes features, you can:

- Transfer employees into existing departments or positions.
- Create new departments or positions, changing the organizational structure and transfer employees into the new departments or positions.
- Merge employees from multiple departments or positions into new or existing departments and positions.

You perform mass organization changes by defining the changes, setting up any necessary information, and then executing the change. Based upon the definitions you enter, the Mass Organization Change process updates the affected records. This process creates Federal personnel action changes into the system as you defined them. This occurs in the same manner as if you had entered them directly online.

Mass changes affect a large number of rows of data in the system, which makes this a powerful tool. Therefore, you must give careful consideration to selecting the person in your organization who is allowed to perform mass organizational changes.

Note. If you are performing several mass change operations, assign each one a unique mass organization change ID to help you retain and identify all of them. You can group them when you set up your run process. We also recommend breaking down large changes into smaller changes to help reduce error and the burden on the system.

Before You Begin

To perform mass organization changes, you must be familiar with PeopleSoft Tree Manager. This section assumes that you know how to use PeopleTools Tree Manager.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Performing Mass Organizational Changes

This section discusses how to:

- Perform mass organizational changes.
- Define mass changes.
- Generate Mass Organization Changes

Performing Mass Organization Changes

To perform mass organization changes for positions:

1. (optional) Create a new department or position or make changes to an existing department or position.

Department Organizational Change	Position Organization Change
1. If you are creating a new department, add the new department to the Departments USF component (DEPARTMENT_TBL). Note. If you are using tree-based data permission security, don't forget to add the new department to the department security tree and refresh SJT_CLASS_ALL. See Chapter 11, "Setting Up Organization Foundation Tables," (USF) Setting Up Federal Departments, page 309. 2. If you use tree-based security and are modifying the department security hierarchy, make the changes in PeopleSoft Tree Manager. See Chapter 5, "Setting Up and Administering HRMS Security," Setting Up and Assigning Tree-Based Data Permission, page 81.	1. If you are creating a new position, add the new position to the Add/Update Position Info component (POSITION_DATA). See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions</i>, "Setting Up Positions," Creating Positions. 2. If you are modifying the position hierarchy, make the changes in PeopleSoft Tree Manager or the organizational structure in the Add/Update Position Info component. Note. You can access the Add/Update Position Info component from the HR: Position tree by adding a new node, (to add a new position) or double clicking on an existing node (to update an existing position). See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions</i>, "Maximizing Position Data," Maintaining Your Organizational Structure.

2. (optional) Recreate the hierarchy.

Department Organizational Change	Position Organization Change
If you made changes to the department hierarchy, re-create it by running the Refresh Department Table (FGHR006) process from the Build Department Organization page (RUNCTL_FGHR006).	If you've made changes to the reporting hierarchy, rebuild the position tree or position structure by running the SQR Build Position Structure (POS006A) process from the Build Position Structure page.

3. Define the mass organization change on the Define Changes page (GVT_MOC_DATA).

Enter the effective date of the change, the action and reason, the nature of action (NOA) and legal authority code or codes and descriptions, and the old and new department or position.

4. Generate mass organization change data.

Use the Apply Changes page (RUNCTL_GVT_MASSORG) to generate mass organization changes based on the Mass Organization Change data setup. This determines which employees in the departments or positions you identified are affected and inserts new rows of Federal personnel action data.

5. Generate the Mass Org Exception report (FGHR034 SQR) to identify who was in an affected department or position.

If an employee wasn't processed, modify their records manually.

6. (position change only) Print the descriptions and/or notices.

Print the necessary position descriptions using the SQR Process FGOF8. Run a few random reports from this process to test and verify the changes that were performed.

Pages Used to Perform Mass Organizational Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Changes	GVT_MOC_DATA	Workforce Administration, Collective Processes, Mass Organization Changes USF, Define Changes, Define Changes	Define mass changes.
Build Position Structure	RUNCTL_ASOFFDATE	Workforce Administration, Collective Processes, Mass Organization Changes USF, Build Position Structure, Build Position Structure	Run the Build Position Structure SQR (POS006A) to link the positions in the system and create the reporting hierarchy represented in the Indented Position Report. See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions</i>, "Maximizing Position Data," Running the Organizational Structure Reports. See Appendix D, "PeopleSoft Application Fundamentals for HRMS Reports," POS006A - Build Position Structure – Manage Positions, page 1186.
Build Department Organization	RUNCTL_FGHR006	Workforce Administration, Collective Processes, Mass Organization Changes USF, Build Department Organization, Build Department Organization	Re-create the departmental hierarchy information for the Departments component, if you made changes to the security tree.
Apply Changes	RUNCTL_GVT_MASSORG	Workforce Administration, Collective Processes, Mass Organization Changes USF, Apply Changes, Apply Changes	Run the Application Engine process GVT_MASSORG to generate mass organization changes to your system data, based on the information that you entered on the Define Changes page.

Page Name	Definition Name	Navigation	Usage
Mass Org Exception Report (mass organization exception report)	RUNCTL_FGHR034	Workforce Administration, Collective Processes, Mass Organization Changes USF, Mass Org Exception Report, Mass Org Exception Report	Run this report to identify those employees that were in a position or department identified in the processed Mass Organization Change ID but who the system did not process. Modify the records of these employees manually.
OF8 Report	RUNCTL_FGOF8	Workforce Administration, Collective Processes, Mass Organization Changes USF, OF8 Report, OF8 Report	Run this report to track position history and to verify a mass position change.

Defining Mass Changes

Access the Define Changes page (Workforce Administration, Collective Processes, Mass Organization Changes USF, Define Changes, Define Changes).

Define Changes

Mass Organization Change ID: 01 Set ID: LTELE *Description: Dept. L1210 change to L1101

Change

☒ Department
 ☐ Position

Defaults

Date of Change: 07/08/1998

Action: XFR

*Reason Code: ROR

WIP Status: PRO

*NOA Code: 790

*Legal Authority (1): UNM

Descr (1): Cite Agcy Dir. or Order

Descr (2):

Department Change

Find | View All | First 1 of 1 Last

Old Department: L1210

New Department:

Position Change

Find | View All | First 1 of 1 Last

Old Position:

New Position:

Reports To:

Define Changes page

Change

Indicate if the change is a department or position change. When you select Department, the system makes the fields in the Position Change group box unavailable. When you select Position, the system makes the fields in the Department Change group box unavailable.

Defaults

The system inserts the values you enter here into the new job data rows it creates for the employees affected by this mass organization change.

Date of Change Enter the date the change takes effect. The system uses this date as the effective date on the new Job Data row.

Action and Reason Code Select the action and reason for the change.

Note. Remember that some actions will set payroll or HR status and/or update employee dates. Review the processing or defaulting that action triggers in the system on the Actions component (ACTION_TBL).

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Defining or Reviewing Personnel Actions.

NOA Code (nature of action code), **WIP Status** (work-in-progress status), and **Legal Authority (1)** Select the NOA code, WIP status, and legal authority (the WIP Status and Legal Authority (1) fields are required).

See [Chapter 14, "\(USF\) Setting Up Human Resources Management Tables," Setting Up Nature of Action Codes, page 377.](#)

See [Chapter 32, "\(USF\) Setting Up the Work-in-Progress Management System," Setting Up WIP Status, page 814.](#)

See [Chapter 14, "\(USF\) Setting Up Human Resources Management Tables," Setting Up Legal Authority Codes, page 376.](#)

Department Change

You can add more than one row to accommodate changes to a number of departments. If you are merging two departments into one, for example, enter two rows and select one old department in one row and the other old department in the other and select the new department they are merging into in the New Department field in each row.

Old Department Enter the name of the department that is being changed.

New Department Enter the new department name.

Position Change

You can add more than one row to accommodate changes to a number of positions.

Old Position Enter the old position name.

New Position Enter the new position name.

Reports To

Enter the position that the new position reports to.

Generating Mass Organization Changes

Access the Apply Changes page (Workforce Administration, Collective Processes, Mass Organization Changes USF, Apply Changes, Apply Changes).

Apply Changes

User ID: HFG

Run Control ID: PS

Set ID: LC

Mass Organization Change ID: 01

[Report List](#)

[Process Monitor](#)

Process Request

Apply Changes page

Mass Organization Change ID

Select the ID of the mass organization change that you want to process. You set up mass organization change IDs on the Define Changes page.

This process:

- Determines the affected employees in the departments or positions identified in the mass organization change ID.
- Inserts a new row of Federal personnel action data for each affected employee with the default information selected for the mass change ID.
- Generates a PDF file that records the action for each employee. You can access the file using through the Process Monitor link.

Review the file to see if there are discrepancies for any rows of data for any of the employees that were updated by the process. You can correct the discrepancies by entering them directly into the Federal HR Processing USF component.

Chapter 37

Working with PeopleSoft Directory Interface for PeopleSoft HRMS

This chapter provides an overview of PeopleSoft Directory Interface for HRMS customers. This chapter discusses how to:

- Load data for HRMS.
- Use PeopleSoft Directory Interface with HRMS.

Note. If you have also licensed PeopleSoft Enterprise Campus Solutions, please refer to the *PeopleSoft Enterprise Campus Solutions Application Fundamentals PeopleBook*, "Working with PeopleSoft Directory Interface for PeopleSoft Campus Solutions"

Understanding PeopleSoft Directory Interface

PeopleSoft Directory Interface enables you to share data that's maintained in your PeopleSoft HRMS database with your Lightweight Directory Access Protocol (LDAP) directory, simplifying directory setup and maintenance.

See Also

PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components

Loading Directory Data Using the DSMAPINPUT FullSync Load Process

This section provides an overview of the directory load processes and discusses how to:

- Clean the temporary tables.
- Run the full data publish.
- Review transactions using the services operations monitor.
- Run the entry membership process.

Understanding the Directory Load Process

Once you have set up PeopleSoft Directory Interface you can load the data into the directory using the Directory Load process or the DSMAPINPUT FullSync Load process.

Use the DSMAPINPUT FullSync Load process to load only people and their job data. Use the Directory Load process when you are loading location and department entries in addition to person and job data.

Note. The Directory Load process sometimes experiences performance issues when loading a large volume of person data. To avoid these issues, use the DSMAPINPUT FullSync Load process.

Note. Both the DSMAPINPUT FullSync Load and the Directory Load processes overwrite any existing data in the directory.

Pages Used to Load the Directory Using the DSMAPINPUT FullSync Load Process

Page Name	Definition Name	Navigation	Usage
Directory Load	EO_RUNCTL_DS_LOAD	Enterprise Components, Directory Interface, Load Directory, Directory Load	- Clean the temporary files. - Run the Entry Membership process.
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish, Full Data Publish	Use to load person and job data into the directory.
Monitor Overview	IB_MONITOR_OVRVIEW	PeopleTools, Integration Broker, Services Operations Monitor, Monitoring, Asynchronous Services, Monitor Overview	Use to review the status of the DSMAPINPUT_FULLSYN C service operation.

Cleaning the Temporary Tables

Run the Clean Temp Tables (DSMAPINPUT) process from the Directory Load page.

1. Specify the appropriate map name and click Run.
2. Select the DS_CLEANTEMP process from the list and click OK.

Note. Do not run the Directory Load (EO_DS_AUDIT) process at this time.

Running the Full Data Publish

The DSMAPINPUT service operation combines information from a person's job and personal data into one service operation. The DSMAPINPUT_FULLSYNC service operation is based on the DSMAPINPUT service operation structure and is defined within the DSMANCHNL service operation queue. The Full Data Publish utility uses the DSMAPINPUT_FULLSYNC service operation and loads multiple streams of emplID data into the directory.

The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you activate the service operation for only the message that you want *before* running this process.

1. Access the Full Data Publish page.
2. Select a Process Frequency of *Once*.
3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC*.
4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Full Table Data Publish (EOP_PUBLISHT) process and click OK.

Review Transactions Using Service Operations Monitor

Monitor the message queue to determine the status of the DSMAPINPUT_FULLSYNC service operation within the DSMANCHNL service operation queue.

1. Access the Monitor Overview page of the Asynchronous Services component.
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Run the Entry Membership Process

After verifying on the Monitor Overview page that all message subscriptions are complete, run the Entry Membership (DSMAPINPUT) process to load members into directory groups based on the Entry Membership Rules.

1. Access the Directory Load page.
2. Specify the appropriate map and click Run.
3. Choose the DS_ENTRY process and click OK.

Note. Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

Auditing Directory Data Using the DSMAPINPUT FullSync Process

This section provides an overview of the directory auditing processes and discusses how to:

- Clean and load the temporary tables.
- Run full data publish for DSMAPINPUT_FULLSYNC_A.
- Review transactions using the Service Operations Monitor.
- Load directory group members and merge LDIF files.

Understanding the Directory Audit Process

Once you have loaded data into the directory and started processing transactions, you can regularly run the Directory Audit process or DSMAPINPUT FullSync Audit process to compare the data in the database to that in the directory.

Use the DSMAPINPUT FullSync Audit process to audit only people and their job data. Use the Directory Load process when you are auditing data that includes location and department entries in addition to person and job data.

Note. The Directory Audit process sometimes experiences performance issues when loading a auditing volume of person data. To avoid these issues, use the DSMAPINPUT FullSync Audit process.

Pages Used to Audit the Directory Using the DSMAPINPUT FullSync Audit Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Directory Audit	EO_RUNCTL_DS_AUDIT	Enterprise Components, Directory Interface, Run Directory Audit, Directory Audit	• Use to clean and load the temporary files. • Load members into directory groups using entry membership rules and merge contents of multiple LDIF files into a single file.
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish	Use a set of rules to publish the DSMAPINPUT_FULLSYN C_A service operation.

Page Name	Definition Name	Navigation	Usage
Monitor Overview	IB_MONITOR_OVRVIEW	PeopleTools, Integration Broker, Services Operations Monitor, Monitoring, Asynchronous Services, Monitor Overview	Use to review the status of the DSMAPINPUT_FULLSYNC_A service operation.

Cleaning and Loading the Temporary Tables

Run the Clean Temp and Load from Dir (EODS_CLEANLD) process from the Directory Audit page.

1. Specify the appropriate map name and click Run.
2. Select the EODS_CLEANLD process from the list and click OK.

Note. Do not run the Directory Load (EO_DS_AUDIT) process.

Running Full Data Publish for DSMAPINPUT_FULLSYNC_A

The DSMAPINPUT service operation combines information from a person's job and personal data into one service operation. The DSMAPINPUT_FULLSYNC_A is a FullSync service operation that is based on the DSMAPINPUT service operation structure and is defined within the DSMANCHNL service operation queue. The queue is partitioned on the emplID field to enable parallel processing. The Full Data Publish utility publishes the service operation. The subscription utility processes multiple streams of emplID data simultaneously. Each subscription produces a unique LDIF file containing LDAP commands for a range of people.

The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you activate the service operation for only the message that you want *before* running this process.

1. Access the Full Data Publish page.
2. Select a Process Frequency of *Once*.
3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC_A*.
4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Full Table Data Publish (EOP_PUBLISHT) process and click OK.

Note. You can choose to use your own service operation instead of DSMAPINPUT_FULLSYNC_A but you must add FULLSYNC_A to the name of the service operation from the directory map. For example, if PERSMSG is a configured service operation specified on the map for person entries, name the service operation PERSMSG_FULLSYNC_A.

Review Transactions Using Service Operations Monitor

Monitor the service operation queue to determine the status of the DSMAPINPUT_FULLSYNC_A message within the DSMANCHNL service operation queue.

1. Access the Monitor Overview page.
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Loading Directory Group Members and Merge LDIF Files

After verifying on the Monitor Overview page that all service operation subscriptions are complete, run the Entry Membership and LDIF Merge (EODS_LDIFMRG) process to load members into directory groups based on the Entry Membership Rules and to merge the contents of all the LDIF files that were generated during the full table publish. You can review the merged file later, modify the contents, and import them into the directory later.

To run the Entry Membership and LDIF Merge process:

1. Access the Directory Audit page.
2. Specify the appropriate map and click Run.
3. Choose the EODS_LDIFMRG process and click OK.

Note. Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

Using PeopleSoft Directory Interface with HRMS

This section discusses how to:

- Access sample mappings and delivered service operations.
- Use sample mappings.
- Review delivered service operations.

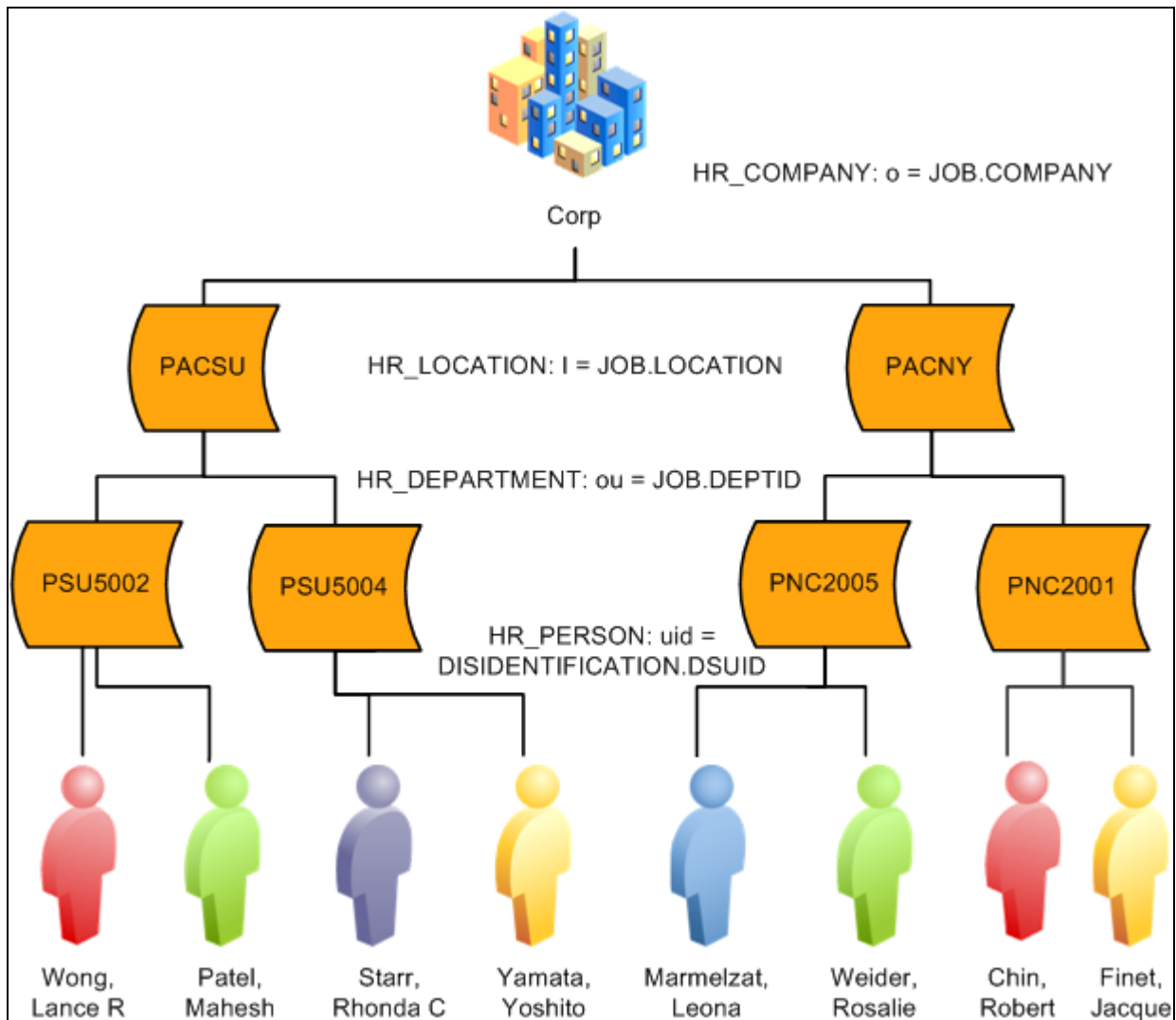
Accessing Sample Mappings and Delivered Service Operations

If you have licensed PeopleSoft Directory Interface for HRMS, PeopleSoft provides you with sample mappings and service operations for HRMS.

Using Sample Mappings

To use sample mappings that PeopleSoft delivers, establish directory IDs in the Directory Configurations component (PSDSSETUP) and add a directory ID to the mappings. The sample mappings use schema objects from a standard Novell eDirectory.

We developed the sample mappings assuming that you are using the tree structure illustrated below, which is HR_PERSONs reporting to HR_DEPARTMENT, the departments are associated to the HR_LOCATION, which report to the corporate level, or HR_COMPANY:



Sample Directory Interface tree

Note. PeopleSoft delivers HR_LOCATION, HR_DEPARTMENT, and HR_PERSON as sample mappings

Reviewing Delivered Service Operations

The following sections describe the delivered sample service operations and PeopleCode functions that are related to your directory mappings.

Directory Interface Service Operations

PeopleSoft Directory Interface delivers the following sample messages for mapping PeopleSoft data to the directory.

Service Operation Name	Directory Entry
DSLOCATION_SYNC	Location Entry (syncs entire record)
DSLOCATION_SYNC_EFF	Location Entry (syncs current row)
DSDEPT_SYNC	Department Entry (syncs entire record)
DSDEPT_SYNC_EFF	Department Entry (syncs current row)
DSWORKFORCE_SYNC	Job Entry (syncs entire record)
DSWORKFORCE_SYNC_EFF	Job Entry (syncs current row)
DSPERSON_BASIC_SYNC	Person Entry (syncs entire record)
DSPERSON_BASIC_SYNC_EFF	Person Entry (syncs current row)

Note. The Directory Interface engine, using the message level HCIDI_SERVICES:HCIDIUtilities.runPOIandIdentifictn, populates the DSIDENTIFICTN table with HRMS values that you can use for creating directory interface maps. For example, it generates a Universal Unique Identifier string and stores it in DSIDENTIFICTN.DSUUID and a default Unique Identifier, stored in DSIDENTIFICTN.DSUID. The default unique identifier defaults to the current person's email address, or, if blank, to the First Name + Last Name.

The UID field is limited to fifty characters. The system truncates the person's name if it exceeds fifty characters.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

DSMAPINPUT Message

The DSMAPINPUT service operation, which corresponds to Directory Input, is a sample service operation that combines a person's job and personal data into one service operation. The DSWORKFORCE_SYNC service operation publishes person's job information. The DSPERSON_BASIC_SYNC service operation publishes a person's personal information.

In the subscription of DSWROKFORCE_SYNC and DSPERSON_BASIC_SYNC, the service operation is passed as input into the BuildMappingMessage, which populates the DSMAPINPUT service operation with the employee's job and personal data. This enables you to map job and personal data for one service operation to one directory entry.

BuildMappingMessage Syntax

The BuildMappingMessage function populates a service operation with data that is stored in another service operation and with data from the local database. After populating the service operation from the two data sources, it calls the mapping function. When all the data required for directory mapping isn't in the original published service operation, BuildMappingMessage uses this function instead of directly calling the mapping function:

BuildMappingMessage (input message, output message, on-line flag, [, map name])

The function performs the following tasks:

- Copies data in the same record from the input service operation into the output service operation.
- Searches for empty records in the output service operation.
- Examines data in the service operation for key values for empty records.
- If it finds key values for empty records, populates empty records in the output service operation by retrieving its current rows in the database.
- If a map name is provided, calls the mapping function for the specified name. Otherwise, calls the mapping function for each map referencing the output service operation.

The BuildMappingMessage is found in the application package and class that is associated with handler of the _EFF service operation. For example, you can find the BuildMappingMessage for the DSLOCATION_SYNC_EFF service operation in theDSMappingSub application class, which is part of DSLOCATION_SYNC_EFF application package. The BuildMappingMessage code is in the FUNCLIB_EO_DS derived record, DSMAPMESSAGE field, FieldFormula event.

Parameters

<i>Name</i>	<i>Type</i>	<i>Description</i>
input service operation	Message	Pass the message containing the originally published data.
output service operation	String	Specify the name of the message to be created, populated, and passed to the mapping function.

<i>Name</i>	<i>Type</i>	<i>Description</i>
online flag	Boolean	Set to <i>true</i> if the function is called after an online message publication. This flag isn't used by the BuildMappingMessage function, but it is passed to the mapping function.
map name	String	Specify the name of the map to be used if the function shouldn't call every map associated with the output message.

An example:

```
Local Message &MsgIn;
```

```
BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```

Chapter 38

Working with Integration Points in Enterprise HRMS

This chapter discusses how to:

- Identify integrations for your implementation.
- Activate service operations and queues.
- Work with HRMS local integrations.
- Work with other HRMS integrations.

Identifying Integrations for Your Implementation

PeopleSoft uses PeopleSoft Integration Broker to integrate HRMS applications with:

- Other PeopleSoft Enterprise HRMS applications inside of the database (local integrations).
- PeopleSoft applications outside of Enterprise HRMS.
- Third-party applications.

Use the Interactive Services Repository (ISR) on My Oracle Support to identify the integrations that you need for your implementation. Documentation provided with the ISR application on My Oracle Support provides instructions for using search pages to query the repository using a variety of criteria:

- By integration point name.
- By product.
- Integrations between products.
- By business process.
- By integration technology.
- Using an advanced search page.

The advanced search page enables you to combine the individual search criteria into a single search.

Click an integration point in the search results to see its details.

See Also

My Oracle Support, Implementation Guide, Implementation Documentation and Software, Interactive Services Repository

The "Interactive Services Repository" PDF instructions on My Oracle Support, Implementation Guide, Implementation Documentation and Software, Interactive Services Repository.

Activating Service Operations and Queues

Integration messages are connected to service operations, which are delivered inactive. You must activate the service operations that your organization uses.

In the PeopleTools, Integration Broker, Integration Setup, Service Operations component:

- Verify or select the Active status for the service operation on the General page.
- Verify or select the correct routing status on the General page.
- Activate the appropriate handlers and associated application classes on the Handlers page.
- Activate the correct routing on the Routings page.

In the PeopleTools, Integration Broker, Integration Setup, Queues component, set the status of the corresponding service operation queue to *Run*.

Note. You must also configure Integration Broker.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

PeopleSoft Enterprise Human Resources PeopleBook: Enterprise Components

Working with HRMS Local Integrations

The system uses a local to local integration when the database that does the publish also has a handler and associated application class on the service operation that triggers other processing within that database.

Setup Requirements

When using local integrations, you must configure only the local node, but the application server must be running both the publish and subscribe servers. The local gateway and node must be properly configured. For local to local integrations, you must activate the asynchronous routing within the local node (local to local).

This table lists the local to local service operations in alphabetical order:

Service Operation	Service Operation	Service Operation
ACCOUNT_CHARTFIELD_FULLSYNC	EP_REVW_RATING	PSXP_CLEANATTR
ACTUAL_TIME_ADD	EP_SUB_COMP	PSXP_RATTR
ACTUAL_TIME_BATCH_ADD	EP_SUB_DEV	PTAF_MASS_APPROVALS
AWARD_GRANT_ISSUE	EP_SUB_PROF	PUNCHED_TIME_ADD
BUDGET_POSITION_FULLSYNC	EP_SUB_WRT	QAS_CRASH_MSG
BUS_UNIT_FS_FULLSYNC	ESTIMATED_TIME_BATCH_ADD	ROLE_MAINT
BUS_UNIT_FS_SYNC	FUND_LOAD	TIME_DEVICE_EMPL_ATT_FULLSYNC
BUS_UNIT_GL_FULLSYNC	GP_POST_GL	TIME_DEVICE_EMPL_ATT_SYNC
BUS_UNIT_GL_SYNC	GRANT_AWARD_UPDATE	TIME_DEVICE_PER_HRS_FULLSYNC
COUNTRY_FULLSYNC	HCR_EM_EVENT	TIME_DEVICE_PROFILES_FULLSYNC
COUNTRY_SYNC	HCR_EM_EVENT_QUEUE_1	TIME_DEVICE_RESTRICT_FULLSYNC
DEPBEN_SYNC	HCR_EM_EVENT_QUEUE_2	TIME_DEVICE_RPTG_CODE_FULLSYNC
DEPT_FULLSYNC	HCR_EM_EVENT_QUEUE_3	TIME_DEVICE_RPT_ELMNT_FULLSYNC
DEPT_FULLSYNC_EFF	HIRE_REQUEST	TIME_DEVICE_SCHEDULE_FULLSYNC
DEPT_SYNC	HR_ACCT_CD_LOAD	TIME_DEVICE_SUPERVSOR_FULLSYNC
DEPT_SYNC_EFF	HR_CHARTFLD_COMBO_SYNC	TIME_DEVICE_TASK_VALS_FULLSYNC
DETAIL_CALENDAR_FULLSYNC	JOURNAL_GEN_APPL_ID_FULLSYNC	TIME_DEVICE_TEMPLATES_FULLSYNC
ELAPSED_TIME_ADD	LOCATION_SYNC	TIME_REPORTING_CODE_FULLSYNC
EP_CHK_SUG	PAYMENT_ERECRUIT_ACKNOWLEDGE	TREE_CHANGE

Service Operation	Service Operation	Service Operation
EP_CHK_WRD	PAYMENT_ERECRUIT_ISSUED	UOM_FULLSYNC
EP_COMPETENCY	PAYMENT_ERECRUIT_REQUEST	UOM_SYNC
EP_COMP_DEV	PERSON_ERN_DELETE	USER_PROFILE
EP_COMP_PROF	POST_HIRE_REQUEST	VAR_COMP_PAYMENT_ACKNOWLEDGE
EP_DEV_TIP	PRODUCT_CHARTFIELD_FULLSYNC	WORKFORCE_FULLSYNC
EP_JPM_CAT_ITEMS	PRODUCT_CHARTFIELD_SYNC	WORKFORCE_SYNC
EP_JPM_CAT_ITEM_RD	PROJECT_ACTIVITY_FULLSYNC	WP_PSHARING_MSG
EP_JPM_CAT_I_RLAT	PROJECT_FULLSYNC	
EP_RATING_MDL	PSXP_ARCHATTR	

See *Enterprise PeopleTools PeopleBook: Integration Broker*

Working with Other HRMS Integrations

Integrations that support particular business processes are documented throughout PeopleSoft HRMS PeopleBooks.

This table provides references to integration information in HRMS PeopleBooks:

PeopleBook	Reference
PeopleSoft Enterprise Global Payroll PeopleBook	See <i>PeopleSoft Enterprise Global Payroll 9.1 PeopleBook</i> , "Integrating with PeopleSoft Enterprise General Ledger."
PeopleSoft Enterprise Global Payroll PeopleBook	See <i>PeopleSoft Enterprise Global Payroll 9.1 PeopleBook</i> , "Integrating with Variable Compensation Functionality."
PeopleSoft Enterprise Human Resources PeopleBook: Manage Professional Compliance	See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Professional Compliance</i> , "Setting Up Manage Professional Compliance."
PeopleSoft Enterprise Human Resources PeopleBook: Manage Variable Compensation	See <i>PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Variable Compensation</i> , "Managing Awards Approval and Payout."
PeopleSoft Enterprise Payroll for North America PeopleBook	See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i> , "Integrating with PeopleSoft Enterprise Time and Labor."

PeopleBook	Reference
PeopleSoft Enterprise Payroll for North America PeopleBook	See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i> , "Integrating with PeopleSoft HRMS and Enterprise Expenses."
PeopleSoft Enterprise Payroll for North America PeopleBook	See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i> , "Integrating with Enterprise General Ledger."
PeopleSoft Enterprise Payroll for North America PeopleBook	See <i>PeopleSoft Enterprise Payroll for North America 9.1 PeopleBook</i> , "Integrating with PeopleSoft Payables."
PeopleSoft Enterprise Stock Administration PeopleBook	See <i>PeopleSoft Enterprise Stock Administration 9.1 PeopleBook</i> , "Administering Variable Compensation Grants," Variable Compensation Integration.
PeopleSoft Enterprise Talent Acquisition Manager PeopleBook	See <i>PeopleSoft Enterprise Talent Acquisition Manager 9.1 PeopleBook</i> , "Managing Employee Referral Programs."
PeopleSoft Enterprise Time and Labor PeopleBook	See <i>PeopleSoft Enterprise Time and Labor 9.1 PeopleBook</i> , "Using Time Collection Devices," Receiving Time from a TCD.
PeopleSoft Enterprise Time and Labor PeopleBook	See <i>PeopleSoft Enterprise Time and Labor 9.1 PeopleBook</i> , "Integrating with PeopleSoft Financials and Enterprise Performance Management."
PeopleSoft Enterprise Time and Labor PeopleBook	See <i>PeopleSoft Enterprise Time and Labor 9.1 PeopleBook</i> , "TCD Interface."
PeopleSoft Enterprise Time and Labor PeopleBook	See <i>PeopleSoft Enterprise Time and Labor 9.1 PeopleBook</i> , "TCD Interface."

Note. To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository in the Implementation Guide section of My Oracle Support.

Chapter 39

Integrating with Oracle Workforce Scheduling

This chapter provides an overview of the integration with Oracle Workforce Scheduling (OWS) and discusses how to:

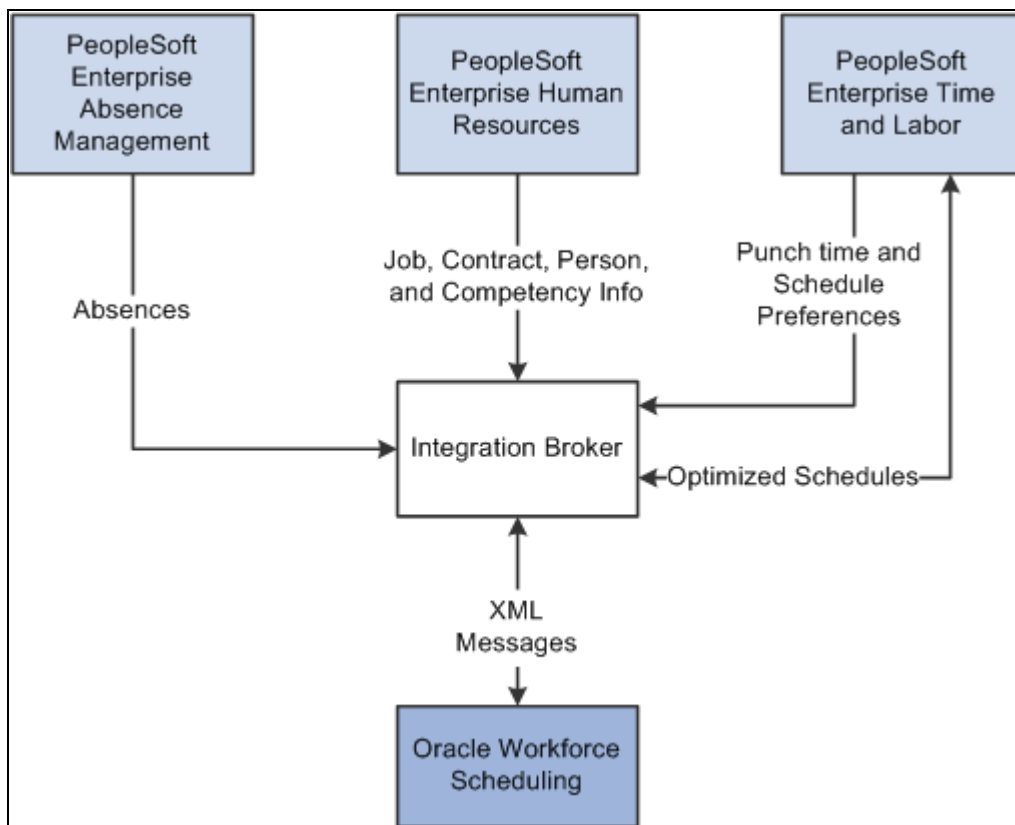
- Set up PeopleSoft integration with OWS.
- Administer Human Resources integration with OWS.
- Administer Absence Management integration with OWS.
- Administer Time and Labor integration with OWS.

Understanding Integration with Oracle Workforce Scheduling

Oracle Workforce Scheduling offers companies a comprehensive solution to forecasting the demand for labor and scheduling to meet customer service and cost objectives. OWS is a simple to use system that can reduce overstaffing and understaffing, increase customer service, and reduce payroll costs. The powerful optimization routines take into account factors such as: demand, employee preferences, skills, availability, labor laws, payroll budgets, workplace rules, best practice, and seasonality. OWS is a standalone product that does not require data from another system in order to function. Integrating OWS with PeopleSoft Human Resources, Absence Management, and Time and Labor eliminates duplicate data entry.

PeopleSoft HRMS integrates with OWS through the PeopleSoft Integration Broker (IB), which is a messaging system that enables you to synchronize data from one application or system with another. PeopleSoft Integration Broker facilitates synchronous and asynchronous messaging among internal systems and trading partners, while managing message structure, message format, and transport disparities.

The following diagram illustrates the HRMS integration with OWS process flow:



OWS Integration with PeopleSoft Enterprise flow

When PeopleSoft HRMS products and OWS are integrated, the following information is exchanged asynchronously between the applications:

- PeopleSoft Human Resources sends employee's personal, job, contract and profile information to OWS.
- PeopleSoft Absence Management sends absence data to OWS.
- PeopleSoft Time and Labor sends employee schedule preferences, updates to schedule preferences and approved or submitted reported time to OWS.
- OWS sends employee optimized punch schedules back to Time and Labor.

The system sends batches of Human Resources messages to OWS when multiple events occur. Such as when an employee has a change to Job Data and Person Data. The system saves event information in a hold file rather than sending the information from each event in separate messages. This enables you to use the Publish OWS Messages process (Workforce Administration, Collective Processes, Publish OWS Messages) to schedule OWS messages.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Setting Up PeopleSoft Integration with OWS

In order to share PeopleSoft Human Resources information with OWS, you must specify that OWS is installed and that an employee and employee record combination are enrolled in OWS. Time and Labor requires that you specify whether a manager can override OWS schedules and select default values.

This section discusses how to:

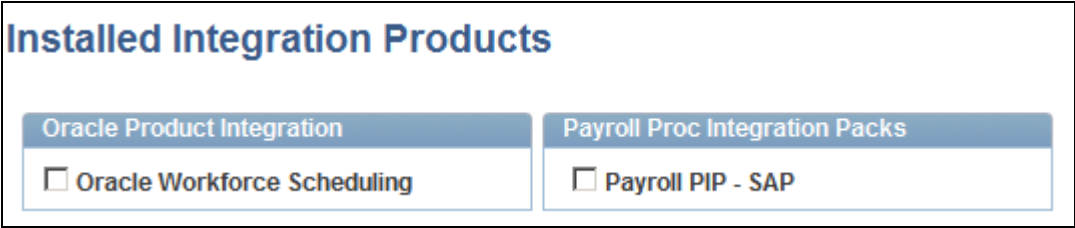
- Set up installed integrations.
- Update job data.
- Add options and default values for OWS.

Pages Used to Set Up PeopleSoft Integration with OWS

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Installed Integration Products	INSTALL_PIP_SEC	Set Up HRMS, Install, Installation Table, Installed Integration Products	Specify that OWS is installed.
Schedule Settings	TL_INSTL_PUNCH	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Settings	Allow overrides to OWS schedules.
Employment Information	EMPLOYMENT_DTA1	Click the Employment Data link at the bottom of any page in the Job Data or Current Job Data component. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update optional employment information.
Configurations	TL_INSTL_PUNCH	Set Up HRMS, Install, Product and Country Specific, Time and Labor Installation, Configurations	Set up schedule total options, schedule resolution options, and punch pattern defaults for your Time and Labor application.

Setting Up Installed Integrations

Access the Installed Integration Products page (Set Up HRMS, Install, Installation Table, Installed Integration Products).



Installed Integration Products page

Oracle Workforce Scheduling

Select to indicate that OWS has been installed and that the system sends the following information through Integration Broker:

- PeopleSoft Human Resources sends employee's personal, job, contract and profile information to OWS.
- PeopleSoft Absence Management sends absence data to OWS.
- PeopleSoft Time and Labor sends employee schedule preferences, updates to schedule preferences and approved or submitted reported time to OWS.
- OWS sends employee optimized punch schedules back to Time and Labor.

Updating Job Data

Access the Employment Information page (Click the Employment Data link at the bottom of any page in the Job Data or Current Job Data component).

Employment Information									
Danilo Travantti			EmplID:		K0W002				
Employee			Empl Record:		0				
Organizational Instance									
Organizational Instance Rcd:		0		Original Start Date:		01/01/2000		☐ Override	
Last Start Date:		01/01/2000		First Start Date:		01/01/2000			
Termination Date:									
Org Instance Service Date:		01/01/2000		☐ Override				Years	Months
								9	4
								7	Days
Organizational Assignment Data									
Instance Record									
Last Assignment Start Date:		01/01/2000		First Assignment Start:		01/01/2000			
Assignment End Date:									
Home/Host Classification:		Home						Years	Months
								9	4
Company Seniority Date:		01/01/2000		☐ Override				7	Days
Benefits Service Date:		01/01/2000		☐ Override				9	4
								7	Days
Seniority Pay Calc Date:		01/01/2000		☐ Override				9	4
								7	Days
Probation Date:									
Professional Experience Date:									
Business Title:				Last Verification Date:					
				Position Phone:					
Oracle Product Integration									
☐ Oracle Workforce Scheduling									

Employment Information page

Oracle Workforce Scheduling

Select to indicate enrollment in OWS for this employee and employee record combination.

Adding Options and Default Values for OWS

Access the Configurations page (Set Up HRMS, Install, Product and Country Specific, Time and Labor Installation, Configurations).

Time and Labor Installation
Configurations
Manager Search Defaults
e-Mail Notifications

[Load Dates](#)
Select Load Dates to enter years to populate a range of dates used for daily processing.
The existing range of dates covers 06/19/1998 through 06/14/2018.

*Schedule Total Option: Include Breaks
Schedule Resolution Option: Take Last Schedule Update

Default Punch Pattern

*Punch Type	*Grid Column Heading		
In	In	+	-
Break	Break	+	-
In	In	+	-
Meal	Lunch	+	-
In	In	+	-
Out	Out	+	-

Oracle Workforce Scheduling
☐ Allow Override to OWS Schedule

Configurations page

Allow Override to OWS Schedule Select to enable a manager to change or override a punch schedule inserted from OWS for the employee and employee record combination on the Manage Schedules page.

Administering HRMS Integration with OWS

PeopleSoft Human Resources publishes an employee's personal, job, contract and profile information to OWS. The system uses the Event Manager to publish the information to OWS via the PeopleSoft Integration Broker messaging. When any of the fields required by OWS in the Personal, Job, Contract, and Profile contributing components are updated, the PERSON_OWS_SYNC message is published to OWS.

The following table describes the Event Manager trigger points for sending information to OWS:

Event Name	Trigger Point	Comments
PersonUpdated	Updating an employee's personal data.	This event is triggered when any of the Personal Data fields are updated.

Event Name	Trigger Point	Comments
JobUpdated	Adding or updating an employee's job data.	In Add or Update mode, this event is triggered if any of the Job Data fields are updated.
JobOWSFlagTurnedOff	Updating an employee's job data.	In Update mode, this event is triggered only if the OWS flag is turned off.
ContractDetailsUpdated	Adding or updating an employee's contract data.	In Add or Update mode, this event is triggered if any of the Contract Data fields are updated.
JobProfileDataUpdated	Adding or updating an employee's job profile data.	In Add or Update mode, this event is triggered if any of the Job Profile Data fields are updated.

The following table describes the OWS fields and the corresponding Human Resources field data that is sent to OWS:

Category	OWS Field	HRMS Field	Human Resources Record
Scope	HRID	EMPLID	JOB_OWS
	StartDate	EFFDT	JOB_OWS
	EndDate	To be calculated	
Person Identification	FirstName	FIRST_NAME	NAMES
	LastName	LAST_NAME	NAMES
	Title	NAME_PREFIX	NAMES
	SSN	NATIONAL_ID	PERS_NID
	HRID	EMPLID	PERS_DATA_EFFDT
	Badge	BADGE_NBR	BADGE_TBL
	BirthDate	BIRTHDATE	PERSON
Contact	Date	EFFDT	PERS_DATA_EFFDT
	HomePhone	PHONE (Type: HOME)	PERSONAL_PHONE
	CellPhone	PHONE (Type: CELL)	PERSONAL_PHONE
	OfficePhone	PHONE (Type: BUSN)	PERSONAL_PHONE
	EmergencyPhone	PHONE	EMERGENCY_CNTCT

Category	OWS Field	HRMS Field	Human Resources Record
	EmergencyContact	CONTACT_NAME	EMERGENCY_CNTCT
	OfficeEMail	EMAIL_ADDRESSES (Type: BUSN)	EMAIL_ADDRESSES
Address	Date	EFFDT	ADDRESSES
	Street	ADDRESS1	ADDRESSES
	City	CITY	ADDRESSES
	State	STATE	ADDRESSES
	Country	COUNTRY	ADDRESSES
	PostalCode	POSTAL	ADDRESSES
Contract	Date		
	PayType	FULL_PART_TIME	JOB
	PayRate	HOURLY_RT	JOB
	MinWeeklyDuration	CNT_MIN_HRS	CONTRACT_DATA
	MaxWeeklyDuration	CNT_MAX_HRS	CONTRACT_DATA
Job Data	Date	EFFDT	JOB
	Hire Date	HIRE_DT	JOB
	Note. These OWS fields are mapped using OWSDesigner.	COMPANY DEPTID LOCATION REG_REGION ESTABID JOBCODE POSITION_NBR	JOB
Skill	Date	JPM_CAT_ITEM_ID	JPM_JP_ITEMS
Skill Efficiency	Date	JPM_RATING1	JPM_JP_ITEMS
Assignment	Date	EFFDT	JOB
	PartyID	DEPTID, LOCATION	

Batch Processing

The system sends batches of Human Resources messages to OWS when multiple events occur. Such as when an employee has a change to Job Data and Person Data. The system saves event information in a hold file rather than sending the information from each event in separate messages. This enables you to use the Publish OWS Messages process (Workforce Administration, Collective Processes, Publish OWS Messages) to schedule OWS messages.

Important! You must use the Publish OWS process to send PeopleSoft Human Resources information to OWS. This only applies to messages created by PeopleSoft Human Resources for OWS and does not effect the way PeopleSoft Absence Management or PeopleSoft Time and Labor sends or receives information from OWS.

Administering Absence Management Integration with OWS

This section provides an overview of Absence Management Integration with OWS and discusses how to publish absence data to OWS.

Understanding Absence Management Integration with OWS

In order to meet customer service and cost objectives, OWS uses employee absence information to forecast the demand for labor and to schedule the right people to the right activities at the right time. PeopleSoft Absence Management uses Integration Broker to send asynchronous, one-way messages to OWS with employee data, absence dates and times.

Publishing All Absence Data to OWS

Initially, you must send all of the active and approved absences to OWS using the Absence Full Sync (GP_ABS_FSYNC) Application Engine process. Absence Management sends absence event data to OWS when all of the following conditions are met:

- The system has OWS installed.
- The employee's HR status is active
- The employee is enrolled in OWS.
- The absence is approved and active.

Cancelled and void absence information is not sent to OWS.

- The absence start date or end date falls on or after the date specified in the Process As Of Date field on the Publish Absence Data to OWS page.

Initially, Absence Management publishes the following fields to OWS:

- EMPLID
- EMPL_RCD

- BGN_DT
- PIN_CODE
- END_DT
- ORIG_BEGIN_DT
- PRC_EVT_ACTN_OPTN
- BEGIN_DAY_HRS
- BEGIN_DAY_HALF_IND
- END_DAY_HRS
- END_DAY_HALF_IND
- ALL_DAYS_IND
- START_TIME
- DURATION_ABS
- START_TIME2
- END_TIME
- END_TIME2

Ongoing Synchronization with OWS

Once the Absence Management and OWS systems have been synchronized using the GP_ABS_FSYNC process, Absence Management continues to publish absence events for active employees that are enrolled in the installed OWS system. The following changes or additions to absence events for enrolled employees are published:

- Add a new, approved, absence event.
- Delete an existing, approved absence event.
- Change an approved event to *Not Approved*.
- Change an absence event to *Approved*.
- The absence event takes place from the process date onward.

- Modify any of the following fields in an approved absence event:
 - BGN DT
 - END DT
 - PRC_EVT_ACTN_OPTN
 - MANAGER APPR IND
 - WF_STATUS
 - BEGIN_DAY_HRS
 - BEGIN_DAY_HALF_IND
 - END_DAY_HRS
 - END_DAY_HALF_IND
 - ALL_DAYS_IND
 - START_TIME
 - END_TIME
 - START_TIME2
 - END_TIME2
 - ORIG BEGIN DT

Use Cases

The following table lists the various actions a user might take in Absence Management and lists the message used to convey the changed information to OWS, the audit action value of the changed data, the information received by OWS, and the actions OWS takes in response to the received data.

Use Case Description	Message	Audit Action	Information Received by OWS	OWS Action
Initially, all approved absences must be sent to OWS.	GP_ABS_FSYNC	A	OWS receives multiple absence event records.	Update the OWS schedule with the new data.
The user approves an absence event. Note. An event may be approved when a manager or employee submits an event, a manager approves an event or an administrator saves an event in the Event Entry component.	GP_ABS_EVENT_SYNC	A	OWS receives an approved absence event record where the field MANAGER_APPR_IND = Y and "IsChanged".	Update the OWS schedule with the new data.

Use Case Description	Message	Audit Action	Information Received by OWS	OWS Action
The user changes an absence event from Approved to Not Approved	GP_ABS_EVENT_S YNC	C	OWS receives an unapproved absence event record where the field MANAGER_APPR_IND = N and "IsChanged."	Remove the absence event from the OWS schedule using the record provided.
The user changes a non-key field in the absence event. For example, START_TIME	GP_ABS_EVENT_S YNC	C	OWS receives the approved absence event record where the changed field has the attribute "IsChanged." For example, if the user changes the START_TIME, then START_TIME is "ISChanged."	Update the OWS schedule with the new data.
The user changes a key field in the absence event. For example, EMPLID, EMPL_RCD, PIN_TAKE_NUM, BGN_DT and END_DT.	GP_ABS_EVENT_S YNC	N (old key) K (new key)	OWS receives two records: • The AUDIT_ACTN = N for the old record • AUDIT_ACTN = K for the new record. The changed field has the attribute "IsChanged."	Use the old record key field to access the old employee schedule and remove the old absence time, then use the new record to update the OWS schedule with the new data. For example, if the user changes the BGN_DT then OWS changes or removes the absence from the schedule using the old BGN_DT and update the schedule with the new BGN_DT.

Use Case Description	Message	Audit Action	Information Received by OWS	OWS Action
The user changes key fields and non-key fields in the absence event. For example, the user changes the BGN_DT and the START_TIME.	GP_ABS_EVENT_SYNC	N (old key) K (new key)	OWS receives two records: - The AUDIT_ACTN = N for the old record - AUDIT_ACTN = K for the new record. The changed fields have the attribute "IsChanged."	Use the old record key field to access the old employee schedule and use the new record to update the OWS schedule with the new data. For example, if the user changes the BGN_DT then OWS removes the absence using the old BGN_DT from the schedule and updates the schedule with the new BGN_DT.
The user deletes an absence event.	GP_ABS_EVENT_SYNC	D	OWS receives the deleted absence event record	Remove the related delete absence data from the OWS schedule.

Page Used to Publish Absence Data to OWS

Page Name	Definition Name	Navigation	Usage
Publish Absence Data to OWS	GP_ABS_FULLSYNC_RC	Global Payroll & Absence Mgmt, Absence and Payroll Processing Publish Absence Data to OWS	Publish absence event data to OWS.

Publishing Absence Data to OWS

Access the Publish Absence Data to OWS page (Global Payroll & Absence Mgmt, Absence and Payroll Processing, Publish Absence Data to OWS).

Publish Absence Data to OWS

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

Run Control Parameters

☒ **Publish Absences for All Employees** *Process As Of Date: 05/08/2009

Employees to Process					Customize Find First Last
	EmplID	Empl Record	Name	Include/Exclude	
1				Exclude	+ -

Publish Absence Data to OWS page

Publish Absences for All Employees Select to publish all absence events. When this field is selected, the system excludes the absence events for any employee and record number combinations listed in the Employees to Process area from the data published to OWS. Deselect the check box to publish only the absence events for the employee and record number combinations listed in the Employees to Process area.

Process As Of Date Enter the date for which you want to publish absence data. Active and approved absences with a start date or end date that falls on or after the Process As Of Date are published to OWS.

Include/Exclude This column indicates whether the absence events for specified employees are included or excluded from the information published to OWS. When the Publish Absences for All Employees check box is selected, the Include/Exclude field for all of the entries in the Employees to Process region are set to *Exclude*. This means that these employees will not have any absence event data sent to OWS.

When the Publish Absences for All Employees check box is deselected, the Include/Exclude field is set to *Include*. This means that only the employee ID's listed in the Employees to Process region will have absence event information published to OWS.

Initially, you must send all of the active and approved absences to OWS using the Absence Full Sync (GP_ABS_FSYNC) Application Engine process.

This process can be used after the initial synchronization between Absence Management and OWS as a way to update data with OWS. For example, if absence data for some employees becomes corrupted, update the information for just the affected employees by entering the EmplID and Empl Rcd Nbr for each affected employee and then deselecting the Publish Absences for All Employees field. This changes the Include/Exclude field to *Include*. When you run the GP_ABS_FSYNC process, the absence events for the listed employees are updated in OWS.

Administering Time and Labor Integration with OWS

The integration between PeopleSoft Enterprise Time and Labor and Oracle Workforce Scheduling is a bi-directional, near real-time integration through Integration Broker. Time and Labor sends employee schedule preferences and reported punch time to OWS and optimized punch schedules are returned from OWS to Time and Labor.

Time and Labor sends and receives information from OWS for employees that meet the following criteria:

- The system has OWS, Human Resources, and Time and Labor installed.
- The employee is enrolled in OWS.
- The employee's HR status is active.
- The employee has a schedule with either a punch or a flex shift type, regardless of the rotating schedule status on the Defining Schedules page.

Pages Used to Administer Time and Labor Integration with OWS

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Publish Reported Time	TL_RPTD_OWS	Time and Labor, Process Time, Publish Reported Time	Send reported punch and approved time to OWS.
Schedule Preferences	SCH_EE_PREF	Self Service, Time Reporting, User Preferences, Schedule Preferences	Enables employees to view and update their schedule related preferences.
Publish Schedule Preference	SCH_PREF_OWS	• Set Up HRMS, Product Related, Time and Labor, Schedules, Publish Schedule Preference • Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Schedules, Publish Schedule Preference	Send all of the applicable schedule preferences to OWS.

Publishing Reported Punch and Approved Time to OWS

Access the Publish Reported Time page (Time and Labor, Process Time, Publish Reported Time).

Publish Reported Time page

Start Date and End Date Enter the start and end date for the schedule information you want to publish to OWS. You must enter both a start and end date.

Select All Employees Select to publish the reported time for all active employees that are enrolled in OWS. Deselect this check box to enter specific time reporter groups in the Employees to Process area.

Use the Employees To Process area to select one or more employees to process or exclude from the reported time that is published to OWS.

EmplID Enter the Employee ID of an active employee enrolled in OWS. When you enter an Employee ID the Time Reporter Group field is not displayed for that row.

Time Reporter Group Enter the Time and Labor employee group ID for which you want to send schedule data to OWS. When you enter a time reporter group, the EmplID, Employee Record, and Include or Exclude Selection fields are not displayed for that row.

Include or Exclude Selection Specify whether to include or exclude a specified employee's schedule data when publishing schedule data to OWS. Values are *Include* and *Exclude*.

Time and Labor publishes any reported punch time with a status of SB or AP. If there is no reported punch time with the correct status, the TL_RPTD_PUB process makes the following entry in the message log: "No employees selected to send to OWS."

Publishing Schedule Preferences to OWS

Time and Labor sends employee schedule preference data, such as start time and end time, to OWS. This enables OWS to forecast the demand for labor and to schedule the right people to the right activities at the right time in order to meet customer service and cost objectives.

Use the Schedule Preferences page (Self Service, Time Reporting, User Preferences, Schedule Preferences) to publish employee preference schedules to OWS. When the user saves his or her schedule preferences, the system uses the SCH_PREFERENCE_SYNC message to publish the information to OWS.

Note. Time and Labor only publishes to OWS for each day that the user enters a Shift ID or a Start Time and End Time. Some employees may not establish preference for every day. Time and Labor does not publish time for days where the Shift ID is set to *Off*.

The system enables you to select a Shift ID or enter the start and end times for each work day. On the Schedule Preferences page, when you select a Shift ID, the Start Time and End Time fields are not available for input. When you choose to enter a start and end time, the system verifies that you have entered values in both the Start Time and the End Time fields.

Time and Labor publishes the *first in* and the *last out* punch times associate with a Shift ID. For example, an employee has the following punch times:

1. 8:00 AM, punch in.
2. 10:00 AM, punch out for morning break.
3. 10:15 AM, punch in.
4. 12:00 PM, punch out for midday meal.
5. 1:00 PM, punch in.
6. 3:00 PM, punch out for afternoon break.
7. 3:15 PM, punch in.
8. 5:00 PM, punch out for end of shift.

The system publishes the 8:00 AM punch in and the 5:00 PM punch out to OWS.

See *PeopleSoft Enterprise Time and Labor 9.1 PeopleBook*, "Using Self-Service Components," Setting Up User Preferences.

Initiating a Full Synchronization of Schedule Preferences

When first integrating Time and Labor and OWS, you must send all of the applicable schedule preferences to OWS using the Publish Schedule Preference process (SCH_PREF_PUB.) Access the Publish Schedule Preference page (Set Up HRMS, Product Related, Time and Labor, Schedules, Publish Schedule Preference).

Receiving Optimized Punch Schedules from OWS

Time and Labor receives optimized employee schedules from OWS through Integration Broker web services. The SCH_OWS_SCHEDULE application messages contain the optimized punch schedules from OWS. Time and Labor inserts the received data into the SCH_EXT_STG staging table. Use the SCH_EXTVALID validation process to perform basic schedule validation.

Chapter 40

Integrating with Clairvia

Clairvia automates staffing deployment based on specific care and workload demands to attain the best clinical and financial result. Clairvia capabilities include web-based employee self service dashboard, productivity measurement, scheduling and staffing, and real-time decision for complete control over staffing resources for an organization.

PeopleSoft Time and Labor facilitates the management of time reporting and time approval, as well as the creation and use of schedules. The scheduling module enables customers to create and maintain schedules and to communicate work expectations, track adherence, and reconcile the actual work completed.

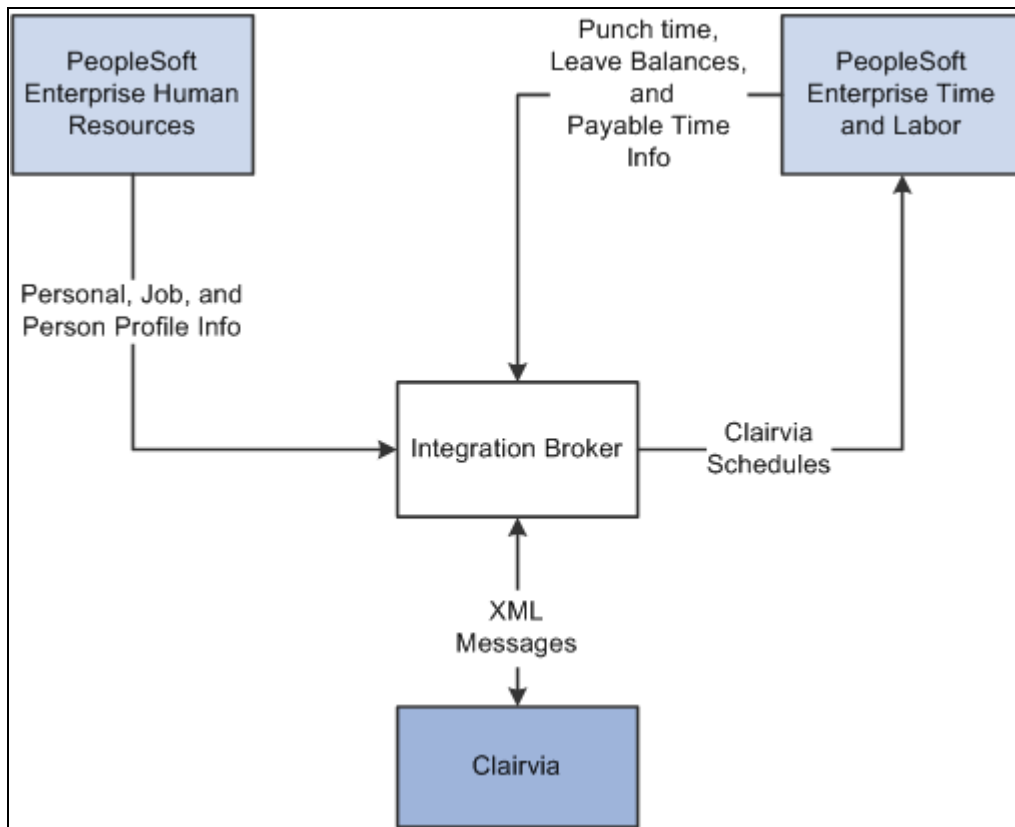
This chapter provides an overview of the integration with Clairvia and discusses how to:

- Administer Integration Broker and Enterprise Components with Clairvia.
- Set up PeopleSoft integration with Clairvia.
- Administer PeopleSoft Human Resources integration with Clairvia.
- Administer Time and Labor integration with Clairvia.

Understanding Integration with Clairvia

PeopleSoft HRMS integrates with Clairvia through the PeopleSoft Integration Broker (IB), which is a messaging system that enables you to synchronize data from one application or system with another. PeopleSoft Integration Broker facilitates synchronous and asynchronous messaging among internal systems and trading partners, while managing message structure, message format, and transport disparities.

The following diagram illustrates the flow of information between PeopleSoft HCM applications and Clairvia:



Information flow between PeopleSoft HRMS, Time and Labor, and Clairvia

When PeopleSoft HRMS products and Clairvia are integrated, the following information is exchanged asynchronously between the applications:

- PeopleSoft Human Resources sends employee personal, job, and person profile information to Clairvia.
- PeopleSoft Time and Labor sends employee reported punch time, leave balances, and payable time to Clairvia.
- Clairvia sends employee work schedule and scheduled leave information back to Time and Labor.

Note. The reported leave time and leave balance information is obtained from Time and Labor through integration with HR Base Benefits. Absence Management is not required for this integration.

The system publishes PeopleSoft Human Resources messages in real-time to Clairvia when any of the following transactions occur:

- Add a person and job (New Hire).
- Add an employment instance to an existing person.
- Add an employment instance to an existing employee (multiple jobs).
- Add or update a person profile for competencies, licenses, etc.
- End an employment instance for an existing Person (Termination).
- Update an employment instance for an existing Person (Transfer).

Important! The PeopleSoft system supports scheduling integration with Clairvia and Oracle Workforce Scheduling. However, the system supports the integration with only one external scheduling application at a time. You cannot integrate your PeopleSoft system with Clairvia and Oracle Workforce Scheduling simultaneously.

Administering Integration Broker and Enterprise Components with Clairvia

PeopleSoft Integration Broker facilitates integrations with PeopleSoft and third-party systems. It features a services-oriented architecture that enables you to expose PeopleSoft business logic to PeopleSoft and third-party systems as services. It also allows you to consume and invoke services from other PeopleSoft and third-party systems. The PeopleSoft Integration Broker manages message structure, message content, and transport disparities between systems.

This section only discusses the configuration necessary to enable Integration Broker to send messages between the PeopleSoft applications and Clairvia.

See *Enterprise PeopleTools PeopleBook: Integration Broker Administration*

This section discusses how to:

- Activate full table publish rules.
- Run the full data publish process.

Pages Used to Administer Integration Broker and Enterprise Components with Clairvia

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Full Table Publish Rules	EOIU_SOPUBFULL	Enterprise Components, Integration Definitions, Full Data Publish Rules	Associate a rule to a message and characterize the rule.
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish	Create the run control for the Full Data Publish utility.

Activating Full Table Publish Rules in Enterprise Components

Access the Full Table Publish Rules page (Enterprise Components, Integration Definitions, Full Data Publish Rules.)

Full Table Publish Rules page

All PeopleSoft applications use common, centralized tables and pages to define how to publish full table messages. The Publish utility uses full table publish rules to process the data. For integration with Clairvia, you must set the Publish Rule Definition Status to Active for the following messages:

- PERSON_BASIC_CV_FULLSYNC_EFF
- JPM_JP_CV_FULLSYNC_EFF
- WORKFORCE_CV_FULLSYNC

See Also

"Portal Solutions PeopleBook: Integration Interfaces", Using the Publish Utility

Running the Full Data Publish Process

Access the Full Data Publish page (Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.)

Full Data Publish

Run Control ID: JPM_JP_CV_FULLSYNC_EFF [Report Manager](#) [Process Monitor](#) [Run](#)

Process Request Find | View All First 1 of 1 Last

*Request ID: CLAIRVIA

Description: JPM_JP_CV_FULLSYNC_EFF

Process Frequency

☐ Once ☒ Always ☐ Don't Run

Parameters

*Service Operation: JPM_JP_CV_FULLSYNC_EFF ClairVia JPM Items FullSync

Full Data Publish page

You must run the Full Data Publish process two times when you initially integrate with Clairvia:

1. Run this process for the DEPT_FULLSYNC, JOBCODE_FULLSYNC, JPM_CAT_FULLSYNC, and POSITION_FULLSYNC messages.
2. After you enter employee data and indicate which employees are integrated with Clairvia, run this process again for the PERSON_BASIC_CV_FULLSYNC_EFF, WORKFORCE_CV_FULLSYNC, and JPM_JP_CV_FULLSYNC_EFF messages.

See [Chapter 40, "Integrating with Clairvia," Administering PeopleSoft Human Resources Integration with Clairvia, page 974.](#)

Setting Up PeopleSoft Integration with Clairvia

In order to share PeopleSoft Human Resources information with Clairvia, you must specify that Clairvia is installed and that an employee and employee record combination are enrolled in Clairvia. Time and Labor requires that you specify whether a manager can override Clairvia schedules and select default values.

This section discusses how to:

- Set up installed integrations.
- Define the published content types.
- Update job data.
- Add options and default values for Clairvia.

Pages Used to Set Up PeopleSoft Integration with Clairvia

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Installed Integration Products	INSTALL_PIP_SEC	Set Up HRMS, Install, Installation Table, Installed Integration Products	Specify that Clairvia is installed.
JPM Catalog Details	INSTALL_CATTYP_SEC	Click the JPM Content Catalog Details link on the Installed Integration Products page.	Defines which content types to publish to Clairvia
Employment Information	EMPLOYMENT_DTA1	Click the Employment Data link at the bottom of any page in the Job Data or Current Job Data component: Workforce Administration, Job Information, Job Data Workforce Administration, Job Information, Current Job	Enroll the selected employee in Clairvia.
Configurations	TL_INSTL_PUNCH	Set Up HRMS, Install, Product and Country Specific, Time and Labor Installation, Configurations	Set up schedule total options, schedule resolution options, and punch pattern defaults for your Time and Labor application.

Setting Up Installed Integrations

Access the Installed Integration Products page (Set Up HRMS, Install, Installation Table, Installed Integration Products).

Installed Integration Products

Oracle Product Integration
☐ Oracle Workforce Scheduling

Payroll Proc Integration Packs
☐ Payroll PIP - SAP

Talent Links
☒ Talent Links

Product Integration Information				
	Application Type	*Product	Installed	JPM Content Catalog Details
1	Scheduling ▼	Clairvia ▼	☒	Edit JPM Content Catalog Details

Installed Integration Products page

- Application Type** Select the type of application that is being integrated. *Scheduling* is the default value.
- Product** Select the product you want to use for integration. *Clairvia* is the default value.
- Installed** Select to indicate the installation of an application type and product combination. The default value is deselected.

Defining the Published Content Types

The system enables you to control the content types published to Clairvia, based on the primary person profile type defined on the Assign Profile Type Defaults page. Use the JPM Catalog Details page to select the content types published to Clairvia.

Access the JPM Catalog Details page (Click the JPM Content Catalog Details link on the Installed Integration Products page).

JPM Content Catalog Details

Catalog Details					
		Find	First	1-8 of 8	Last
	Product	Content Type	Description		
1	Clairvia	AREA STUDY 	Areas of Study		
2	Clairvia	COMPETENC 	Competencies		
3	Clairvia	DEG 	Degrees		
4	Clairvia	HON 	Honors and Awards		
5	Clairvia	LNG 	Language Skills		
6	Clairvia	MEM 	Memberships		
7	Clairvia	RANK 	Military Rank		
8	Clairvia	TRAVEL 	Travel Preferences		

JPM Content Catalog Details page

Content Type

Select the Profile Management content type to publish to Clairvia.

Updating Job Data

In order to send information to Clairvia, you must select the Clairvia field in the Product Integration Information region of the Job Data component for each Clairvia employee.

Access the Employment Information page (Click the Employment Data link at the bottom of any page in the Job Data or Current Job Data component).

Employment Information							
<u>Antonio Santos</u> Employee		Empl ID:	KU0010				
		Empl Record:	0				
Organizational Instance							
Organizational Instance Rcd:	0	Original Start Date:	09/12/1997	☐ Override			
Last Start Date:	09/12/1997	First Start Date:	09/12/1997				
Termination Date:				Years	Months	Days	
Org Instance Service Date:	09/12/1997	☐ Override		13	0	10	
Organizational Assignment Data							
Instance Record							
Last Assignment Start Date:	09/12/1997	First Assignment Start:	09/12/1997				
Assignment End Date:							
Home/Host Classification:	Home			Years	Months	Days	Time Reporter Data
Company Seniority Date:	09/12/1997	☐ Override		13	0	10	
Benefits Service Date:	09/12/1997	☐ Override		13	0	10	
Seniority Pay Calc Date:	09/12/1997	☐ Override		13	0	10	
Probation Date:	31						
Professional Experience Date:	31	Last Verification Date:	31				
Business Title:	Payroll Clerk		Position Phone:				
Product Integration Information							
☒ Clairvia							

Employment Information page, showing the Product Integration Information group box

Clairvia Select to enroll the employee in Clairvia.

Since basic HRMS data flows only from PeopleSoft to Clairvia, you must add new employees to PeopleSoft before adding them to Clairvia.

Adding Options and Default Values for Clairvia

You can specify whether a manager can override the schedules sent from Clairvia. Enabling schedule overrides allows a manager to make ad hoc changes to schedules and create personal schedules for specific employees.

Access the Configurations page (Set Up HRMS, Install, Product and Country Specific, Time and Labor Installation, Configurations).

Time and Labor InstallationConfigurationsManager Search Defaultse-Mail Notifications

Load Dates

Select Load Dates to enter years to populate a range of dates used for daily processing.
The existing range of dates covers 06/19/1998 through 06/14/2018.

*Schedule Total Option:

Include Breaks

Schedule Resolution Option:

Take Last Schedule Update

Default Punch Pattern

*Punch Type	*Grid Column Heading		
In	In	+	-
Break	Break	+	-
In	In	+	-
Meal	Lunch	+	-
In	In	+	-
Out	Out	+	-

Product Integration

☒ Allow Override To Schedule

Configurations page, showing the Product Integration group box

Allow Override to Schedule

Select to enable a manager to change or override a Clairvia schedule for the employee and employee record combination on the Manage Schedules page. Deselect this field to prevent manager overrides of Clairvia schedules on the Manage Schedules page.

Administering PeopleSoft Human Resources Integration with Clairvia

PeopleSoft Human Resources publishes an employee's personal, job, and person profile information to Clairvia. The system uses application messaging to publish the information to Clairvia via PeopleSoft Integration Broker messaging.

Initial Set Up Synchronization

When you establish the integration between your PeopleSoft system and Clairvia, Oracle recommends that you perform the following steps:

1. Run the Full Data Publish process for the following messages:
 - DEPT_FULLSYNC
 - JOBCODE_FULLSYNC
 - JPM_CAT_FULLSYNC
 - POSITION_FULLSYNC
2. Enroll the existing employees in your PeopleSoft system into Clairvia via the Job Data page or using the ADD_CLAIRVIA_EMPLOYEES DataMover script provided by Oracle.

The ADD_CLAIRVIA_EMPLOYEES PeopleTools DataMover script enables you to add the initial employee and employee record instances that you want to integrate with Clairvia at one time. You modify the DataMover script to include the employee information for the desired employees, and then initiate the DataMover process to insert the employee information into the PS_PER_ORG_ASG_INT integration table.

For example, assume your hospital has 3,000 nurses that you wish to enroll in Clairvia. Rather than manually updating the Job Data for each of those employees, use the ADD_CLAIRVIA_EMPLOYEES DataMover script to complete a mass enrollment of the employees.

3. Run the Full Data Publish process again, to send any enrolled employee data from your PeopleSoft system to Clairvia.

Run the process for the following messages:

- PERSON_BASIC_CV_FULLSYNC_EFF
- WORKFORCE_CV_FULLSYNC
- JPM_JP_CV_FULLSYNC_EFF

Data Published to Clairvia

When any of the fields required by Clairvia in the Personal, Job, and Profile contributing components are updated, the following messages are published to Clairvia:

- PERSON_BASIC_CV_SYNC_EFF
- WORKFORCE_CV_SYNC
- JPM_JP_CV_SYNC_EFF

The system publishes the messages to the Clairvia node after removing any future-dated and history rows using the Enterprise Components method Process Effdt Msg, for Person and HR Manage Profiles data. Clairvia only accepts current effective-dated information for these messages. Future-dated rows are published using the Enterprise Components Effective Dated Publish utility.

Clairvia accepts all historic, current and future dated messages for job related information

Clairvia does not integrate with organizational-related setup tables such as Business Unit, and Location, as well as other setup tables for Job Profile Management such as Rating Model, School, School Type and Major. If no integration point exists between PeopleSoft and Clairvia, you must manually map any desired setup table data. For subsequent change to a PeopleSoft table value, you must manually update the information in the Clairvia system. For example: adding a new location.

The following table describes the Clairvia fields and the corresponding Human Resources field data that is sent to Clairvia:

<i>Clairvia Field Name</i>	<i>Clairvia Description</i>	<i>PeopleSoft Field Name</i>
ProfileID/CostCenter	Links Employee to a Profile	DEPTID (External Dept ID)
EmployeeID	Employee's ID	EmplID
FirstName	Employee's first name	First Name
LastName	Employee's last name	Last Name
Initial/MI	Employee's middle initial	Middle Name
Email	Employee's email address	Email_Addr
HireDate	The date on which the employee was hired. For example: 19960702 for July 2, 1996	Orig Start Date, Last Start Date
BirthDate	The date on which the employee was born. For example: 19730202 for February 2, 1973	Birth Date
Street/Address	Employee's street address	Address Line 1
Apt	Employee's apartment address	Address Line 2
City	City in which the employee lives	City
State/Province/Region	State in which the employee lives	State
ZIP/Postal Code	Employee's ZIP code	Postal Code
Country	Country in which the employee lives	Country
Period*	The type of period for employee hours, shifts, point and pay limits 0 - None, 1 - Day, 2 - Week, 3 - Month, 4 - Years, 5 - Bi Weekly	Work Period
HoursPerPeriod	The max. no. of hours to be worked per period	Standard Hours

Clairvia Field Name	Clairvia Description	PeopleSoft Field Name
MinPeriod	Type of period for Employee minimum limit. 0 - None, 1 - Day, 2 - Week, 3 - Month, 4 - Years, 5 - Bi Weekly	Work Period
Skill/JobCode	Maps Job code to skill code	Job Code
HourRate	Rate per hour	Hourly Rate
DeptID	Employee Department ID	DEPTID (External Dept ID)
FTE	Employee FTE status	FTE
EmpAction	Employee action: 1-Transfer; 2 - Terminate; 3 - Change in Job	Action Action_Descr
ActionStartDate	The date on which the employee action starts. For example: 19730202 for February 2, 1973	Effective Date Termination Date
PhoneType	Employee phone type: 1-HomeNum, 2-WorkNum, 3-PageNum, 4-OtherNum	Phone Type
PhoneNumber	Employee phone number. Uses format: 1234567890	Phone
CompetencyName	Competency name	Content Type
CompetencyValue	Competency value	Content Items
CompetencyExpDate	Date on which the competency expires	Expiration Date
Years of Experience		Years of Exp
Seniority Date		Company Seniority Date or Union Seniority Date
Start Date		Start Date LST_ASGN_START_DT
Job Type	Primary, Secondary	Job Indicator

Human Resources Messages Design Overview

This section provides an overview of the message design for many of the sync and fullsync Integration Broker messages generated for Human Resources.

PERSON_BASIC_CV_FULLSYNC_EFF Message Design

For the Person Basic Clairvia FullSync Current Effective dated message (PERSON_BASIC_CV_FULLSYNC_EFF) the system uses the Enterprise Components Full Data Publish Utility. The system uses the mapping views on the Full Publish Rule to override the actual message records with views that extract only current effective dated rows for Clairvia employees.

The standard PERSON_BASIC_FULLSYNC message publishes information for all employees, regardless of their enrollment in Clairvia, as well as all past, present and future dated rows of information that is not relevant to Clairvia. Using the mapping views publishes only the current effective-dated information needed by Clairvia to the PERSON_BASIC_CV_FULLSYNC_EFF message immediately. The Full Data Publish Utility ignores historical data and writes future-dated rows to the EO_EFFDELAY delay record. The Enterprise Components Effective Date Publish utility picks up any records from the delay table that are now current and generates PERSON_BASIC_CV_SYNC_EFF messages.

The full data publish utility publishes a data message with all of the PERSON_DATA information for all Clairvia integrated employees.

WORKFORCE_CV_FULLSYNC Message Design

For the Workforce Clairvia FullSync message (WORKFORCE_CV_FULLSYNC) the system uses the Enterprise Components Full Data Publish Utility. The system uses the mapping views on the Full Publish Rule to override the actual message records with views that extract all historical, current and future dated rows for Clairvia employees.

Using the mapping views publishes only the information needed by Clairvia to the WORKFORCE_CV_FULLSYNC message immediately. This message does not use '_EFF' in the message name, so it does not use current effective dating logic and passes all rows over to the new Clairvia message.

The full data publish utility publishes a data message with the workforce information for all Clairvia integrated employees.

JPM_JP_CV_FULLSYNC_EFF Message Design

For the HR Manage Profiles JP Clairvia FullSync Current Effective dated message (JPM_JP_CV_FULLSYNC_EFF), the system uses the Enterprise Components Full Data Publish Utility. The system uses the mapping views on the Full Publish Rule to override the actual message records with views that extract only current effective dated rows for Clairvia employees for the desired HR Manage Profiles content type, using the highest ranking qualifier instance content items.

The standard JPM_JP_FULLSYNC message publishes information for all employees, regardless of their enrollment in Clairvia, as well as all qualifier instances and all past, present and future dated rows of information that is not relevant to Clairvia. Using the mapping views publishes only the current effective-dated information needed by Clairvia to the JPM_JP_CV_FULLSYNC_EFF message immediately. The Full Data Publish Utility ignores historical data and writes future dated rows to the EO_EFFDELAY Delay record. The Enterprise Components Effective Date Publish utility picks up any records from the delay table that are now current and generates JPM_JP_CV_SYNC_EFF messages.

The full data publish utility publishes a data message with all of the Profile information for all Clairvia integrated employees.

PERSON_BASIC_CV_SYNC_EFF Message Design

For the Person Basic Clairvia Sync Current Effective-dated message (PERSON_BASIC_CV_SYNC_EFF), the system makes two passes to place the generic data into a format that Clairvia can use. A handler was added to PERSON_BASIC_SYNC for the first pass and a handler added to PERSON_BASIC_CV_SYNC for the second pass.

In the first pass, the data in the PERSON_BASIC_SYNC message is copied to an interim PERSON_BASIC_CV_SYNC message that contains all data except for the PERS_ORG_REL_WK work record, which is not required by Clairvia.

In the second pass, an Enterprise Components routine reads the PERSON_BASIC_CV_SYNC message and determines if the message contains the current effective-dated row. Current effective-dated rows are copied to the PERSON_BASIC_CV_SYNC_EFF message for publishing. Future-dated rows are copied to the EO_EFFDELAY Delay record. The EC Effective Dating utility compares the future dated row to the date on the utility and if the date is now current, generates the PERSON_BASIC_CV_SYNC_EFF message. Historical rows are ignored and not copied to PERSON_BASIC_CV_SYNC_EFF. The Effective Dating utility creates three messages: a header message where PSCAMA. MSG_SEQ_FLG = H, a data message containing the actual data needed by Clairvia and a trailer message where PSCAMA. MSG_SEQ_FLG = T.

JPM_JP_CV_SYNC_EFF Message Design

For the HR Manage Profiles Profile Clairvia Sync Current Effective-dated message (JPM_JP_CV_SYNC_EFF), the system makes two passes to place the generic data into a format that Clairvia can use. A handler was added to JPM_JP_SYNC for the first pass and a handler added to JPM_JP_CV_SYNC for the second pass.

In the first pass, the data in the JPM_JP_SYNC message is copied to an interim JPM_JP_CV_SYNC message after the system removes any content types that are not one of the Clairvia installation table content types.

In the second pass, an Enterprise Components routine reads the JPM_JP_CV_SYNC message and determines if the message contains the current effective-dated row. Current effective-dated rows are copied to the JPM_JP_CV_SYNC_EFF message for publishing. Future-dated rows are copied to the EO_EFFDELAY Delay record. The Effective Dating utility compares the future dated row to the date on the utility and if the date is now current, generates the JPM_JP_CV_SYNC_EFF messages. Historical rows are ignored and not copied to JPM_JP_CV_SYNC_EFF. The Effective Dating utility creates three messages: a header message where PSCAMA. MSG_SEQ_FLG = H, a data message containing the actual data needed by Clairvia and a trailer message where PSCAMA. MSG_SEQ_FLG = T.

WORKFORCE_CV_SYNC Message Design

For the Workforce Sync Clairvia message (WORKFORCE_CV_SYNC), a handler for the message reads the generic WORKFORCE_SYNC message and copies all rows over to WORKFORCE_CV_SYNC that are for Clairvia Employees. All past, present and future data is copied to the WORKFORCE_CV_SYNC message.

Administering Time and Labor Integration with Clairvia

This section provides an overview of the Time and Labor integration with Clairvia, and discusses how to:

- Publish reported punch time and reported leave time to Clairvia.

- Publish leave balances to Clairvia.
- Receive schedule and leave information from Clairvia.

Understanding Time and Labor Integration with Clairvia

In order for Time and Labor to send and receive information from Clairvia, your system must meet the following criteria:

- PeopleSoft Human Resources and PeopleSoft Time and Labor are installed.
- Clairvia is installed.
- Time reporting codes and leave plans are manually entered in Clairvia.

In addition, employees must meet the following criteria:

- The employee must be enrolled in Clairvia.
- The PeopleSoft employee must exist in Clairvia – using the messages from PeopleSoft HR.
- The employee must be enrolled in Time and Labor.

Pages Used to Administer Time and Labor Integration with Clairvia

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Publish Time and Labor Data	TL_TIME_DATA	Time and Labor, Process Time, Publish Time and Labor Data	Send reported punch and approved time to Clairvia. Run the TL_PUB_TLDAT process.
Publish Leave Balances	TL_TIME_DATA	Time and Labor, Process Time, Publish Leave Balances	Send the Base Benefits leave balances for subscribed employees to Clairvia.

Publishing Time and Labor Data to Clairvia

Access the Publish Time and Labor Data page (Time and Labor, Process Time, Publish Time and Labor Data).

Publish Time and Labor Data

Run Control ID: CV2

[Report Manager](#) [Process Monitor](#)

Run

Run Control Parameters

Select Timeframe

Time Option:

Current Date

Prior Date Grace Days:

Future Date Grace Days:

Select Data

☐ Verify Presence

☒ Reported Time

☐ Payable Time

TRC List:

☐ Select All Employees

Employees To Process

Customize | Find | First 1 of 1 Last

Empl ID	Name	Empl Record	*Include or Exclude		
ALWYN	angel dsouza	0	Include	+	-

Publish Time and Labor Data page (showing Current Date time option)

Publish Time and Labor Data

Run Control ID: CV2 [Report Manager](#) [Process Monitor](#) Run

Run Control Parameters

Select Timeframe

Time Option: Start Date and End Date ▼

Start Date: 01/01/2010 31

End Date: 08/06/2010 31

Select Data

☐ Verify Presence

☒ Reported Time

☐ Payable Time

TRC List:

☐ Select All Employees

Customize Find First 1 of 1 Last				
Empl ID	Name	Empl Record	*Include or Exclude	
ALWYN	angel dsouza	0	Include ▼	+ -

Publish Time and Labor Data page (showing Start Date and End Date time option)

- Time Option** Select the time frame for the published data. The values are: *Current Date* and *Start Date and End Date*. Select *Current Date* to use the system date as the reporting period to collect the data for publishing. Select *Start Date and End Date* to specify a reporting period.
- Start Date and End Date** Enter the range of dates to process. These fields are available if you select *Start Date and End Date* in the Time Option field.
- Prior Date Grace Days** Enter the number of days before the current date you want to include in the data published to Clairvia. The system uses a reporting period start date equal to the system date minus the value in this field. This field is only available if you select *Current Date* in the Time Option field.
- Future Date Grace Days** Enter the number of days in the future you want to include in the data published to Clairvia. The system uses a reporting period end date equal to the system date plus the value in this field. This field is only available if you select *Current Date* in the Time Option field.

Verify Presence	Select to publish the punch time for all employees, or any employees specified in the Employees to Process grid. For employees that have punch time when the process initiates, the system publishes the punch time so that Clairvia can track employees that are present at work. The system publishes any punch times that are available at publishing time, with a status of SV- Saved, NA - Needs Approval, AP – Approved, and SB – Submitted. Leave data is not included when you select this option.
Reported Time	Select to publish reported punch time, reported leave, and leave balances to Clairvia. Only reported time with a status of SB-Submitted, or AP-Approved, is published.
Payable Time	Select to publish employee payable time to Clairvia. The system publishes payable time with any status other than DN, CL, IG, OE, NP, PB, and RV. In addition, payable time with a negative quantity that is not offset, is published to Clairvia. If you specify a TRC List, the system only publishes payable time with those TRC's in the TRC List to Clairvia. Note. Payable Offsets are not published to Clairvia. The system identifies offset rows where the ORIG_SEQ_NBR is not zero.
TRC List	Select which TRCs the system uses when publishing payable time within the reported period to Clairvia. Leave this field empty to publish all payable time within the reported period. This field is only available when you select the Payable Time option.
Select All Employees	Select to publish the leave balance for all enrolled employees for the selected date range. Deselect this field to specify employees to include or exclude from processing.

Publishing Payable Time Scenarios

The following examples illustrate the payable time published to Clairvia by Time and Labor in different situations:

1. Scenario 1: For EMPLID KU0015, EMPL_RCD=0, the original and offset rows of payable time result in a zero quantity for the DUR.

<i>DUR</i>	<i>SEQ_NBR</i>	<i>TRC</i>	<i>TL_QUANTIT Y</i>	<i>PAYABLE_S TATUS</i>	<i>RECORD_ON LY_ADJ</i>	<i>ORIG_SEQ_ NBR</i>
10/10/2010 0:00	543210001	KUREG	7.5	RP	N	543210001
10/10/2010 0:00	543210002	KUREG	-7.5	RP	N	543210001

Time and Labor publishes the following information to Clairvia:

<i>DUR</i>	<i>SEQ_NBR</i>	<i>TRC</i>	<i>TL_QUANTIT Y</i>	<i>PAYABLE_S TATUS</i>	<i>RECORD_ON LY_ADJ</i>	<i>ORIG_SEQ_ NBR</i>
10/10/2010 0:00	543210001	KUREG	0	RP	N	543210001

2. Scenario 2: For EMPLID KU0015, EMPL_RCD=0, the original, offset, and new rows of payable time result in a positive quantity for the DUR.

<i>DUR</i>	<i>SEQ_NBR</i>	<i>TRC</i>	<i>TL_QUANTIT Y</i>	<i>PAYABLE_S TATUS</i>	<i>RECORD_ON LY_ADJ</i>	<i>ORIG_SEQ_ NBR</i>
10/10/2010 0:00	543210001	KUREG	6	TP	N	543210001
10/10/2010 0:00	543210002	KUREG	2	TP	N	543210002
10/10/2010 0:00	543210011	KUREG	-6	ES	N	543210001
10/10/2010 0:00	543210012	KUREG	-2	ES	N	543210002
10/10/2010 0:00	543210013	KUREG	3	ES	N	0
10/10/2010 0:00	543210014	KUREG	1	ES	N	0

Note. There are two KUREG for the same DUR in this scenario because there is a split in the task. For example, the system allocates 80% to Department A and 20% to Department B.

Time and Labor publishes the following information to Clairvia:

<i>DUR</i>	<i>SEQ_NBR</i>	<i>TRC</i>	<i>TL_QUANTIT Y</i>	<i>PAYABLE_S TATUS</i>	<i>RECORD_ON LY_ADJ</i>	<i>ORIG_SEQ_ NBR</i>
10/10/2010 0:00	543210013	KUREG	3	ES	N	0
10/10/2010 0:00	543210014	KUREG	1	ES	N	0

3. Scenario 3: For EMPLID KU0015, EMPL_RCD=0, the user reports a negative quantity for regular time (KUREG).

<i>DUR</i>	<i>SEQ_NBR</i>	<i>TRC</i>	<i>TL_QUANTIT Y</i>	<i>PAYABLE_S TATUS</i>	<i>RECORD_ON LY_ADJ</i>	<i>ORIG_SEQ_ NBR</i>
10/10/2010 0:00	543210001	KUREG	–3.75	ES	N	0
10/10/2010 0:00	543210002	KUREG	–1.25	ES	N	0

Time and Labor publishes the following information to Clairvia:

<i>DUR</i>	<i>SEQ_NBR</i>	<i>TRC</i>	<i>TL_QUANTIT Y</i>	<i>PAYABLE_S TATUS</i>	<i>RECORD_ON LY_ADJ</i>	<i>ORIG_SEQ_ NBR</i>
10/10/2010 0:00	543210001	KUREG	–3.75	ES	N	0
10/10/2010 0:00	543210002	KUREG	–1.25	ES	N	0

4. Scenario 4: For EMPLID KU0015, EMPL_RCD=0, the original row has a status of *Ignored*. The payable time row never made it to payroll. This can be because the time reporting code is not mapped to an earning or the time rejected by payroll is intentionally closed out and is never paid.

DUR	SEQ_NBR	TRC	TL_QUANTIT Y	PAYABLE_S TATUS	TL_PYBL_ REASON_CD	ORIG_SEQ_ NBR
10/10/2010 0:00	543210001	KUREG	6	IG	MRJ	0
10/10/2010 0:00	543210002	KUREG	2	RP	PNP	543210002
10/10/2010 0:00	543210011	KUREG	-2	ES		543210002
10/10/2010 0:00	543210012	KUREG	6	ES		0
10/10/2010 0:00	543210013	KUREG	2	ES		0
10/10/2010 0:00	543210014	KUOVT	1.9125	ES		0
10/10/2010 0:00	543210015	KUOVT	.6375	ES		0

For this scenario, SEQ_NBR 543210001 is rejected by payroll, and then closed by the user. The user intentionally did not want this row paid. SEQ_NBR 5643210002 (TL_QUANTITY=2) is in rejected status, but this row could still be picked up for payroll. Then there is a change in reported time that causes the system to create offsets. The offset row is SEQ_NBR 543210011, and new time is generated for 543210012 through 543210015.

Time and Labor publishes the following information to Clairvia:

DUR	SEQ_NBR	TRC	TL_QUANTIT Y	PAYABLE_S TATUS	TL_PYBL_ REASON_CD	ORIG_SEQ_ NBR
10/10/2010 0:00	543210012	KUREG	6	ES		0
10/10/2010 0:00	543210013	KUREG	2	ES		0
10/10/2010 0:00	543210014	KUOVT	1.9125	ES		0
10/10/2010 0:00	543210015	KUOVT	.6375	ES		0

5. Scenario 5: For EMPLID KU0015, EMPL_RCD=0, Adjust Paid Time added a row (SEQ_NBR starts with '99999' and RECORD_ONLY_ADJ = Y).

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	RECORD_ONLY_ADJ	ORIG_SEQ_NBR
10/10/2010 0:00	999990001	KUMLO	1.5	CL	Y	0
10/10/2010 0:00	999990002	KDSAD	-1.75	CL	Y	0

For this scenario, Time and Labor does not publish any information to Clairvia.

6. Scenario 6: For EMPLID KU0015, EMPL_RCD=0, the employee has been paid and a check reversal has been created.

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	ORIG_SEQ_NBR	TL_PYBL_REASON_CD	INITIAL_SEQ_NBR
10/10/2010 0:00	543210001	KUREG	8	DL	0		543210001
10/10/2010 0:00	543210002	KUOVT	2	DL	0		543210002
10/10/2010 0:00	543210011	KUREG	-8	RV	543210001	CRV	543210001
10/10/2010 0:00	543210012	KUOVT	-2	RV	543210002	CRV	543210002

For this scenario, Time and Labor publishes the following information to Clairvia:

DUR	SEQ_NBR	TRC	TL_QUANTITY	PAYABLE_STATUS	ORIG_SEQ_NBR	TL_PYBL_REASON_CD	ORIG_SEQ_NBR
10/10/2010 0:00	543210011	KUREG	0	RV	543210001	CRV	543210001
10/10/2010 0:00	543210012	KUOVT	0	RV	543210002	CRV	543210002

7. Scenario 7: For EMPLID KU0015, EMPL_RCD=0, the employee has been paid and a check reversal has been created. However, the user wants the new estimated rows to be generated for future payment.

<i>DUR</i>	<i>SEQ_NBR</i>	<i>TRC</i>	<i>TL_QUANTITY</i>	<i>PAYABLE_STATUS</i>	<i>ORIG_SEQ_NBR</i>	<i>TL_PYBL_REASON_CD</i>	<i>INITIAL_SEQ_NBR</i>
10/10/2010 0:00	543210001	KUREG	8.5	RV	543210001	CRV	543210001
10/10/2010 0:00	543210010	KUREG	-8.5	RV	543210001	CRV	543210001
10/10/2010 0:00	543210011	KUREG	8.5	ES	0		543210001

For this scenario, Time and Labor publishes the following information to Clairvia:

<i>DUR</i>	<i>SEQ_NBR</i>	<i>TRC</i>	<i>TL_QUANTITY</i>	<i>PAYABLE_STATUS</i>	<i>ORIG_SEQ_NBR</i>	<i>TL_PYBL_REASON_CD</i>	<i>INITIAL_SEQ_NBR</i>
10/10/2010 0:00	543210011	KUREG	8.5	ES	0		543210001

Message Definition

When you run the TL_PUB_TLDAT process from the Publish Time and Labor Data page, the system publishes the TL_TIME_DATA Integration Broker message to Clairvia.

Message Definition

Schema

Status: Message cannot be changed. Message referenced in runtime tables.

Message: TL_TIME_DATA

Schema Exists: Yes

☐ Part Message

Version: VERSION_1

Alias:

Description:

Owner ID:

Comments:

Message Type

☐ Rowset-based
 ☐ Nonrowset-based
 ☒ Container

[Service Operation References](#)

Add Parts

Container Attributes

Message Name	Message Version	Sequence	Minimum Occurs	Maximum Occurs	*Unbound Maximum
TL_VP_MSG	VERSION_1	1	0	1	N
TL_RT_MSG	VERSION_1	2	0	1	N
TL_PT_MSG	VERSION_1	3	0	1	N

Message Definition page, showing the parts of the TL_TIME_DATA message

The TL_TIME_DATA message is a container with 3 parts:

- TL_VP_MSG contains punch time data only. This is the information specified by the Verify Presence option on the Publish Time and Labor Data page.
- TL_RT_MSG contains reported time data including all punch time, reported leave, and leave balances. This is the information specified by the Reported Time option on the Publish Time and Labor Data page.
- TL_PT_MSG contains the payable time data. This is the information specified by the Payable Time option on the Publish Time and Labor Data page.

Publishing Leave Balances to Clairvia

After integrating Time and Labor and Clairvia for the first time, send all of the leave balances for the subscribed employees to Clairvia using the Publish Leave Balances process (TL_PUB_LVBL.)

Access the Publish Balance page (Time and Labor, Process Time, Publish Leave Balances).

Publish Leave Balance

Run Control ID: CV2

[Report Manager](#)[Process Monitor](#)

Run

Run Control Parameters

☐ Select All Employees

Employees To Process

CustomizeFind

First1 of 1Last

Empl ID	Name	Empl Record	*Include or Exclude		
ALWYN	angel dsouza	0	Include	+	-

Publish Leave Balances page

Select All Employees

Select to publish the leave balance, as of the current date, for all enrolled employees. Deselecting this field enables you to specify employees to include or exclude from processing.

Message Definition

When you run the TL_PUB_LVBL process from the Publish Leave Balance page, the system publishes the TL_LB_MSGC Integration Broker message to Clairvia.

Message DefinitionSchema

Status: Message cannot be changed. Message referenced in runtime tables.

Message: TL_LB_MSGC

Schema Exists: Yes

☐ Part Message

Version: VERSION_1

Alias: LeaveBalanceContainer

Description: Leave Balance Container

Owner ID: TL Interfaces

Comments: This container message is used to publish Time and Labor Leave Balances

Message Type

☐ Rowset-based

☐ Nonrowset-based

☒ Container

[Service Operation References](#)

Add Parts

Container Attributes

Message Name	Message Version	Sequence	Minimum Occurs	Maximum Occurs	*Unbound Maximum
TL_LB_MSGC	VERSION_1	1	0	1	N

Message Definition page, showing the parts of the TL_LB_MSGC message

The TL_LB_MSGC message is a container with one part. The message, TL_LB_MSG, contains data from the TL_OWSSR_RUNCTL, TL_RUN_CTRL_GRP, TL_COMPLEAV_TBL, and JOB tables.

Receiving Schedule and Leave Information from Clairvia

Time and Labor uses the SCH_OWS_INTEGRATION App Class and the SCH_OWSVALID Application Engine to handle inbound messages from Clairvia.

Clairvia publishes finalized schedules and leave to Time and Labor using the SCH_OWS_SCHEDULE message. The system performs the following steps after receiving the message:

1. Time and Labor validates the schedule punch time and leave time. The system performs basic leave validations including validating the reporting code and the employee's leave balance.
2. The system inserts valid schedules into the PS_SCH_ADHOC_DTL table, and inserts a summary of schedules into the PS_SCH_MNG_SCH_TBL table.
3. Valid leave is inserted into the PS_TL_RPTD_TIME table with a REPORTED_STATUS of AP. The leave plan balance is updated in the TL_COMPLEAV_TBL table.
4. Invalid schedule and leave data is inserted into the SCH_INTEG_ERROR table.
5. The system sends a response message (SCH_OWS_MESSAGE) to Clairvia.
 - When all rows are processed successfully, the system sends a success response message to Clairvia.
 - Information in error is returned to Clairvia for correction. The message includes the employee's information a rejection reason code. You can review the error data with the SCH_INTEGRATION_ERROR query.

Rejection Reason Codes

The following table lists the rejection reason codes:

Error Code	Description
1	Invalid Employee and Employee Record Number
2	Invalid Schedule Source
3	Invalid Schedule Category
4	Invalid Punch Type
5	Invalid Activity
6	Invalid Activity Type
7	Invalid Event
8	Invalid Time Zone

Error Code	Description
9	Transaction already exists
10	Cannot add, transaction exists
11	Cannot change or delete, transaction exists
12	Employee not enrolled with Integration Product
13	Employee not enrolled in Clairvia
14	Leave balance is not sufficient
15	TRC is blank (Type=0 and TRC=blank)
16	TRC is not active

The following graphic shows an example of the results of the SCH_INTEGRATION_ERROR query in the Query Viewer:

SCH_INTEGRATION_ERROR - Integration Error Handling

From Date Under Reporting: 08/01/2010

To Date Under Reporting: 09/01/2010

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All First 1-4 of 4 Last

	Empl ID	Empl Record	Display Name	Error Code	Error Descr	DtTm Created	DUR	Seq Nbr	SeqNum	Punch Date Time	Source	Punch Type	Quantity
1	ALWYN	0	angel dsouza	17	Not Enrolled Leave Benefit	08/04/2010 12:11:47AM	08/02/2010	1	1	08/02/2010 6:30:00PM	I	0	4.000000
2	ALWYN	0	angel dsouza	17	Not Enrolled Leave Benefit	08/04/2010 12:13:33AM	08/02/2010	1	1	08/03/2010 6:30:00PM	I	0	4.000000
3	ALWYN	0	angel dsouza	17	Not Enrolled Leave Benefit	08/04/2010 12:14:34AM	08/03/2010	1	1	08/03/2010 6:30:00PM	I	0	4.000000
4	ALWYN	0	angel dsouza	16	TRC is not active	08/04/2010 12:15:50AM	08/03/2010	1	1	08/03/2010 6:30:00PM	I	0	4.000000

SCH_INTEGRATION_ERROR query results in the Query Viewer

Appendix A

Group Build Implementation for Developers

This appendix discusses how to:

- Build applications or batch programs that include group build functions.
- Work with group versions.

Building Applications or Batch Programs that Include Group Build Functions

This section discusses how to:

- Implement PeopleCode API calls.
- Implement PeopleSoft Application Engine API calls.
- Develop client-specific workflow.

Implementing PeopleCode API Calls

This section discusses what a developer must do to use Group Build in the application that he or she is building. (We refer to this application as the client application.)

Note. Please read this entire section before performing any steps.

To Implement PeopleCode API calls:

1. (Optional) Set up a Group Build results table.

Group Build provides a standard Group Results Table called GB_GRP_RES_TBL. This table contains the results of the groups that you build; its content is managed entirely by the Group Build application. This table provides a central place for storing Group Build results, so the results can be shared by all applications that use Group Build. *Do not add, delete or modify rows in this table.*

If you want a table for your application where you can add, delete, or modify rows, you must perform this optional step. Your table will be taken into account for the construction and purge processes of the Group Build application.

There are two ways to set up your own table:

- a. Log on to PeopleSoft Application Designer and clone the record GB_GRP_RES_TBL into MyClientModuleResultTable.

This record becomes your client application result table.

- b. Create a new record (MyClientModuleResultTable) into which you insert (at least) the subrecord GB_GRP_RES_SBR (the minimal structure for a modified result table). The modified results table can contain more fields than the one that is defined in the subrecord. However, you can't use the standard query «GB_DEFAULT_QUERY». You must create your modified developer query in which the additional fields appear in the «field tab». For example, if your result table is defined as DEPTID, define your modified query as follows:

- All fields from GB_QRY_LINK_VW.
- All of your additional fields.

2. (Optional) Add two fields on the client application record to store the group ID and group as of date. If you choose not to record this information, you can use a derived/work record (see step 3) or system variables (such as system date).

In PeopleSoft Application Designer, add two fields to the client application record (MyClientModuleRecord):

- The field GB_GROUP_ID for storing the Group ID.

This field should prompt on GB_GROUP_TBL.

- The field MyAsOfDate for storing the as of date of the group.

3. In PeopleSoft Application Designer, create a derived/work record to store your group generation button.

- a. Create a new record (DERIVED_MyClientModule) or use an existing derived record.
- b. Create a new field: MyClientModule_GEN_BTN.
- c. To the DERIVED_MyClientModule record, add a new field: MyClientModule_GEN_BTN.

4. In PeopleSoft Application Designer, Include the work page GB_API_WRK in the client application component.
 - a. Open the component (MyClientModuleComponent) that contains the page (MyClientModulePage) from which you'll call the Group Build API.
 - b. Insert the page named GB_API_WRK (the Group Build work page) into MyClientModuleComponent and mark it as hidden.
5. (Optional) Using PeopleSoft Query, define the query that you might want to add to for refining your group - developer query definition.
 - a. Insert the view GB_QRY_LINK_VW (required).
 - b. Insert the record(s) that are needed for joins and criteria.
 - c. Write your query according to the Group Build limitations.
See Group Build Query Limitations for Developers
 - d. Add all necessary prompts on the criteria tab.
Prompt values are bound using the GB_BIND API call.
 - e. Verify that your query is PUBLIC.
 - f. Save your query as MyDeveloperQueryName.
6. Add modified fields on the client application page.
 - a. Add the MyClientModuleRecord.GB_GROUP_ID field to MyClientModulePage.
 - b. Add the MyClientModuleRecord. MyAsOfDate field to MyClientModulePage.
 - c. Add the DERIVED_MyClientModule.MyClientModule_GEN_BTN group generation button to MyClientModulePage.
7. Add PeopleCode to implement calls to Group Build API.

Warning! All calls to Group Build API must be done from level 0 of your client application page.

- a. Make calls to Group Build API in the FieldChange PeopleCode event.
 - b. Set the PeopleCode Event Properties to Application Server.
 - c. Select Application Server on the PeopleCode Event Properties page.
See PeopleCode API Functions.
8. Implement PeopleSoft Security to see if a group can be used in the component.
 - a. GB_GROUP_ID field must be on the page, and the recordfield properties must be set to prompt table edit on Record GB_GROUP_SEC_VW.
 - b. Add DERIVED_XXX.PNLGRPNAME and DERIVED_XXX.OPRID on level 0 of the page. The fields must be display-only and hidden.

PeopleCode API Functions

This list is a funclib (DERIVED_HR_GB.GB_API FieldFormula) for PeopleCode. Specifies which API group, query name for refinement, and results table to use.

- Specifies which group, query name, results table to use.

```
&ret_bool = GB_DECLARE(group_id, AsOfDate of the group, query_name, result_table=>name)
```

- The parameter group_id is required.
- The parameter AsOfDate is required.
- The parameter query_name specifies a developer query name for refinement. It is optional. The default query name is GB_DEFAULT_QUERY (view PS_GB_QRY_LINK_VW).
- The parameter result_table_name is needed if the results table has been modified. It is optional. The default result table is PS_GB_GRP_RES_TBL. The result_table_name has to be complete; for example, « PS_MY_RESULT_TABLE ».

- Binding values.

```
&ret_bool = GB_BIND(prompt_code, value)
```

- Enables you to bind values if prompts have been defined in the modified query developer. If you're using the standard query GB_DEFAULT_QUERY, then the only value to be bound is the refinement date: use the delivered API, GB_BIND_DATE.
- The parameter prompt_code must be defined as a prompt in the developer query.
- The parameter value is required.
- Binding a date as refinement when you're using the standard query.

```
&ret_bool = GB_BIND_DATE(value)
```

- Use this function when you use the standard query GB_DEFAULT_QUERY. It enables you to bind a date (value) as a refinement.
- The parameter value is optional and specifies a refinement date. The default is %date.

- Generating and executing the SQL statement.

```
&group_version_number = GB_EXEC(refresh_flag)
```

- This API generates and executes the SQL statement.
- It returns the version number of the generated group.
- If the parameter refresh_flag is set to Y, the SQL statement is generated each time you call the function. If the refresh_flag is set to N, the function checks to see if a generated group exists and returns its version number. If the group doesn't exist, the parameter generates it. The refresh_flag is required.
- Deleting the content of the result table.

```
GB_DELETE()
```

- Disabling/enabling the generic workflow and the specific workflow.

GB_SET_JOB_WF(job_name)

- Disables/enables the generic workflow and the specific workflow according to job_name value. Specifies the job (job_name) to be scheduled in place of the default job name (used for generic workflow), if specified.
- The parameter job_name is optional.
- If the job_name is specified, then the job that is named job_name must be defined in PeopleSoft Process Scheduler, as described in the workflow section.
- Providing a non-null job_name enables the corresponding workflow. Generic workflow is disabled.
- Providing a null job_name as parameter enables the generic workflow (workflow by default).
- On FieldChange PeopleCode event of DERIVED_MyClientModule.MyClientModule_GEN_BTN, add the following code according to one of the two scenarios described below.

Scenario 1

If you implement Group Build calls using the standard Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```

Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
/* Use this instruction if you plan to use GB_GRP_RES_TBL */

GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord.MyAsOfDate, «=>
    », « ») ;

/* Bind all parameters for the default Query : The Effdt of JOB */
GB_BIND_DATE(Any Date ) ;

/* Execute the SQL and fill the group result table */

&MyVersion = GB_EXEC ( « Y » ) ;    /* <Y> Forces to rebuild the group even if one=>
    is available */

* The list of employees for the group is now available for your own usage */
/* The code presented above populates the Group Result table GB_GRP_RES_TBL */
/* You can now use this record to populate your scrolls or can be used as a join=>
    for a SQL Statement */

/* ADD YOUR CODE HERE */

/* Clear the group result table only in the case you know the group will not be=>
    used anymore*/

[GB_DELETE() ;]

```

Scenario 2

If you implement Group Build calls using your own modified Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```

Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

/* Give your result table name to GB_DECLARE (STEP 1 must have been previously⇒
   performed) and your Query Name if you created one */

GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord. MyAsOfDate,⇒
  « MyDeveloperQueryName », «MyClientModuleResultTable ») ;

/* Bind all parameters for MyDeveloperQueryName */

/* Each prompt in MyDeveloperQueryName must be binded */

GB_BIND (« :1 », MyClientModuleRecord.MyField1) ;

[...]

GB_BIND (« :n », MyClientModuleRecord.MyFieldn) ;

/* Or use local variable for binding */

GB_BIND (« :n », &MyLocalVarn) ;

/* Execute the SQL and fill the group result table */

&MyVersion = GB_EXEC ( « N » ) ; /* <N> Don't rebuild the group if it is⇒
   available */

/* Employee group is now available for your module */

/* This populates the group result table MyClientModuleResultTable */

/* You can now use this record to populate your scrolls or work on this table... */

/* ADD YOUR CODE HERE */

/* Clear the group result table only in the case you know the group will not be⇒
   used anymore*/

[GB_DELETE() ;]

```

Group Build Query Limitations for Developers

Following are some limitations to the standard use of PeopleTools Query:

- Developer queries need to be defined as PUBLIC queries.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You must include the view GB_QRY_LINK_VW in the query.

- Records that you add in QUERY must have at least one criterion.
- Prompts can be used as expressions to bind variables.

Implementing PeopleSoft Application Engine API Calls

This section discusses what a developer has to do to use Group Build in the application that he or she is building, using PeopleSoft Application Engine. (We refer to this application as the client application.)

To implement PeopleSoft Application Engine API calls:

1. In PeopleSoft Application Designer, create a Run Control page.
2. Create a new Run Control record or use an existing one.

In this record, add:

- The parameters GB_GROUP_ID, GB_EFFDT, and GB_REFINE_DATE.
- The field VERSIONGBQDM.

3. In PeopleSoft Application Engine, create a new program .

This program must contain:

- A retrieval of parameters.

Step01.SQL:

```
%Select(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, AE_GBP002_AET.GB_
REFINE_DATE) SELECT GB_GROUP_ID , GB_EFFDT , GB_REFINE_DATE FROM PS_RUN_
CNTL_HR WHERE OPRID = %Bind(OPRID) AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

- A call to Group Build PeopleCode API.

Step02.PeopleCode:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_RESET PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND_DATE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_SET_PANELGROUP PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

GB_SET_PANELGROUP("APPENGINE"); /* This is due to a tools issue and will
disappear as soon as the TPRD is closed */

GB_RESET();

&RET = GB_DECLARE(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, "", "");
&RET = GB_BIND_DATE(AE_GBP002_AET.GB_REFINE_DATE);

AE_GB_API_AET.REFRESH_SW.Value = "N"; /* You can see that the REFRESH_FLAG is
set to "N" Equivalent to GB_EXEC("N"). As we can't call a section with direct
parameters, we must use the cache record of the AE API to perform this
operation */
```

- A call to Group Build AE API GB_EXEC.

Step02.Call Section:

Call the section GB_API.GB_EXEC. You must not call GB_EXEC_LIB.GB_EXEC Directly.⇒
You will always use the GB_API AppEngine Lib.

- Version number of the group.

Step01.SQL:

```
UPDATE PS_RUN_CNTL_HR SET VERSIONGBQDM = %Bind(AE_GB_API_AET.VERSIONGBQDM) ⇒
WHERE OPRID = %Bind(OPRID) AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

Note. Perform your own Application Engine processing using this group.

4. Create reports, based on the group that you just created, by setting up a JOB.

When the system launches the SQR, you get the GB_GROUP_ID VERSIONGBQDM (version of the group) from the Run Control record. This enables you to retrieve the group from the Group Results Table and print or perform processing on it.

Differences Between PeopleCode and Application Engine APIs

Question	Answer
What are the differences between a PeopleCode API and a PeopleSoft Application Engine API?	For building a group, there are not many differences between the two APIs. • In both APIs, you use the PeopleCode function GB_DECLARE, GB_BIND, or GB_BIND_DATE. • In the PeopleCode API, you call GB_EXEC("Y") with a REFRESH_FLAG ("Y" or "N") as parameter, and the function returns the VERSION of the group. • In the PeopleSoft Application Engine API, you call a section GB_API.GB_EXEC. The refresh flag is set before this call by updating AE_GB_API_AET.REFRESH_SW, and you retrieve the version of the group in the cache record AE_GB_API_AET.VERSIONGBQDM.
Why can't we use the PeopleCode API directly in a PeopleSoft Application Engine PeopleCode step?	There is a PeopleTools limitation: The CallAppEngine() function is not intended to be inserted into an Application Engine PeopleCode step. If you need to call an Application Engine program from another Application Engine program, you must use the Call Section Action.

Developing Client-Specific Workflow

This section provides the additional steps that must be performed for implementing workflow. This specific workflow is an enhancement to the generic workflow that is provided by default by the Group Build application. Workflow must be fully implemented by the client application developer. This section discusses the main differences between the Group Build workflow and the standard way of implementing workflow.

Although the business process diagram looks like the Group Build generic workflow business process, you have to develop a business process for each client application to enhance the information that is provided by the Group Build generic workflow. The reasons for this are:

- The worklist routing to enhance user information should branch the user directly to the calling-client application page.
- The business event is triggered from the client application page.

The worklist record table has to contain key fields for accessing the client application page, so map those fields to the appropriate client application page fields (the workflow is triggered from the calling page).

The Message Agent is responsible for entering data on the client application page for triggering the specific workflow. The Database Agent executes a query that retrieves the values that are passed as Message Agent input fields. Therefore, the Database Agent query should retrieve the necessary key values, plus the condition for triggering the workflow.

You have to define a new client-specific table record (MySpecificWorkflowTable). This record stores all client application key fields, the group ID (GB_GROUP_ID) field, and the version (VERSIONGBQDM) field. Populate the MySpecificWorkflowTable after you call Group Build (to get the version number).

Summary

As a client application developer, you have to:

1. Define a new table (MySpecificWorkflowTable) for storing the page key, group ID, and version number fields.
2. Define a new worklist table record.
3. Define a derived/work field that is responsible for triggering the workflow.
4. Add this field to the client application page as a hidden field.
5. Provide PeopleCode for storing page key values before calling Group Build.
6. Define a Database Agent query for retrieving the key field values: group ID, version number, and user ID.
7. Design the business process (activities, steps, business event, worklist routing, email routing, Database Agent, and Message Agent) and define the necessary attributes and field mappings.
8. Define a new process for the modified Database Agent (MyDBAGProcess) in PeopleSoft Process Scheduler.
9. Define a new job (MySpecificJobName) that serializes PeopleSoft Application Engine, calling the section GB_EXEC in Application Engine GB_API and the modified Database Agent process (MyDBAGProcess).
10. Pass the new job name to Group Build as a parameter through a new API function, GB_SET_JOB_WF(MySpecificJobName), which passes the new job name to be scheduled, enables the specific workflow, and disables the generic workflow. The call to this function must be done before the call to GB_EXEC.
11. Add PeopleCode to save the necessary information in MySpecificWorkflowTable (see the following procedure).

To add PeopleCode to save the information in MySpecificWorkflowTable:

1. Design MySpecificWorkflowTable so that all the key fields that are necessary for accessing your client application page will be recorded.
 - a. Add two key fields, GB_GROUP_ID and VERSIONGBQDM, to your record.
 - b. Add a workflow flag, WF_FLAG.

2. Design MySpecificWorkflowDerived/Work.

- a. Add two fields: GB_TRIGGER_WF (responsible for triggering the workflow) and OPRID (important for routings).
- b. Make the fields invisible.

3. Define a worklist record, MyWorklistRecord, for routing to the calling client application page.

BUSPROCNAME, ACTIVITYNAME, EVENTNAME, WORKLISTNAME, INSTANCEID, and TRANSACTIONID are standard, required fields for a worklist record.

Add all of your page's key fields, plus the GB_GROUP_ID and VERSIONGBQDM fields.

4. Define the Database Agent (DBAG) query.

The DBAG query is responsible for calling the client application key field values: group ID, group version number, and user ID.

- a. In PeopleSoft Tree Manager, add MySpecificWorkflowTable to the HR ACCESS GROUP, as follows:
- b. Go to PeopleSoft Query.
- c. Join MySpecificWorkflowTable and GB_GENERICWF on group ID and version number to return specific key values: group ID, group version number, workflow triggering flag, and user ID.
- d. Include in your criteria prompts on group ID and version number.
- e. Save your query as a public database agent query named "_DBAG__MySpecificWorkflowQuery".

5. Design the MySpecificBusinessProcess.

- a. In PeopleSoft Application Designer, define a business process.

MySpecificBusinessProcess has two activities:

MySpecificWorkflowModule

MySpecificWorkflowModuleResult

Each activity has only one step branching to the client application page:

- b. In the MySpecificWorkflowModule activity, add a business event, a worklist routing, an email routing, a database agent, and links.
- c. Define each item and its required attributes.

The business event is triggered from the MySpecificWorkflowDerived/Work record.
- d. Add workflow PeopleCode, using the button Edit Business Rules and write the code as displayed, providing the condition for calling the TriggerBusinessEvent function. Write the correct parameters: business process, activity, and business event to trigger.
- e. On the Worklist Attributes page, select the record defined in step 4 as the worklist record. Specify the Business Process, its activity that works the worklist (MySpecificWorkflowModuleResult).
- f. On the Field Map page, specify the mapping between the worklist record fields and your client application page keys.
- g. For the OPRID field, select the role name Roleuser by Oprid Qry, binding the OPRID query variable to the MySpecificWorkflowDerived/Work.OPRID field.
- h. For the email routing, define the field map between your email fields (SUBJECT, NOTETEXT, TO, CC, and BCC) and your application fields.
- i. Define the Database Agent items:

Define the target component on the Message Attributes page and provide the path to your client application component.

In the Query Name field, enter the database agent query defined in Step 5.

Define the mapping between the query selection fields (second column) and your client application page fields (last column).

6. Go to PeopleSoft Process Scheduler and define MySpecificWorkflowDBAGProcess
 - a. Add a new process of type Database Agent on the Process Definitions page.
 - b. On the Process Definition Options page, override the parameters list in Append mode, specifying the following as parameters:


```
E100 -T -L /A MySpecificWorkflowModule /MD MyDatabaseAgentName
kbind1=:DERIVED_HR_GB.GB_GROUP_ID2 -kbind2=:DERIVED_HR_GB.VERSIONGBQDM
/A stands for Activity Name
/MD stands for Message Definition
-kbind1 and -kbind2 are bind variables from the API work page.
```
7. In PeopleSoft Process Scheduler, define MySpecificWorkflowJob.

Add a new job serializing the Group Build Application Engine process (the one that calls GB_API.GB_EXEC) and MySpecificWorkflowDBAG database agent process.
8. Add calls to Group Build API on your client application.

On the FieldChange PeopleCode event of your Group Build calling button, use Group Build API as described at Step 7 in the first section of this documentation. Don't forget to call the GB_SET_JOB_WF function to activate your specific workflow and disable the generic workflow.
9. Add PeopleCode to store the necessary information in MySpecificWorkflowTable.

Working with Group Versions

This section provides an overview of version numbers and discusses how to work with versions (for developers).

Understanding Version Numbers

Each time you build a group, the system generates a version number and stores it in the Group Result Table. The system creates a new version number and updates the result table if any of the following have changed since the last time you executed the group:

- The group definition.
- The query definition.
- Any parameters that you used to generate the group; for example, if you used effective-dated job data.

Working with Versions (for Developers)

Before reading this section, see "Building Applications or Batch Programs That Include Group Build Functions".

You can implement Group Build in an application by:

- Using the default developer query.

The default developer query works with the default Group Result Table.

- Creating your own query.

If you use your own query, you can define more parameters and/or more fields in a personal Group Results Table.

However, you can use your own Group Results Table with the default developer query or use the default Group Results Table with your own query, as long as the fields selected by the query match the default Group Results Table structure.

This means that the system regenerates the group and changes the version number if either of the following changed since the last time you executed this group:

- The query definition that was added by the developer.
- The Group Results Table.

Note. You can bypass the versioning mechanism by calling `GB_EXEC("Y")`. Then the group is generated each time it is called.

Note. When using Developer Query or User Query, keep in mind that `GB_QRY_LINK_VIEW` is based on the `JOB` record. When Group Build generates the SQL, the system replaces all references to `GB_QRY_LINK_VIEW` with `JOB`. If, after this is done, the left `REC.FIELD` is the same as the right `REC.FIELD`, Group Build will not process the line in the SQL generation.

For example, if you have the criteria `GB_QRY_LINK_VIEW.EFFDT <= JOB.EFFDT` in Query, Group Build will replace it with `JOB.EFFDT <= JOB.EFFDT`. The system will then remove the line because the left `REC.FIELD` is the same as the right `REC.FIELD`. As a result, the Query count may differ from the one returned by Group Build.

Appendix B

PeopleSoft HRMS Application Diagnostic Plug-ins

This chapter provides an overview of application diagnostics and lists the diagnostic plug-ins delivered with HRMS.

Understanding Application Diagnostics

Enterprise PeopleTools Diagnostic Framework provides an interface enabling you to execute queries designed to investigate application problems and present the data in a standardized format that you can then share with PeopleSoft's Global Support Centre.

The diagnostic framework provides:

- Dynamic prompting, enabling you to restrict queries and include transactional data.
- Output in XML, in addition to HTML.
- Send functionality, enabling you to send the output directly to the email address of the global support center analyst working with you.
- Support for rowset retrieval.

HRMS has delivered a number of diagnostic plug-ins, which are application-specific queries, with this version. We will post any plug-ins we develop post-GA on My Oracle Support.

See Also

Enterprise PeopleTools PeopleBook: Data Management, "Running Diagnostics with Diagnostic Framework"

Delivered Application Diagnostic HRMS Plug-Ins

These tables list the diagnostic plug-ins delivered by application.

Human Resources Manage Base Benefits

Manage Base Benefits delivers the one plug-in.

BA_EVENT_DIAGNOSTICS

The BA_EVENT_DIAGNOSTICS plug-in (Benefits Event Definition and Rules Setup Information):

- Uses the following additional parameters:
 - Event Rule ID
 - Effective Date
- Provides a diagnosis of the Benefit Event Setup and Coverage Code Rules associated with it.

Data is extracted from the three primary tables: BAS_EVENT_RULE, BAS_EVENT_CLASS, and BAS_CVG_CD_RULE. Use this diagnostic to view the underlying data as it is defined in the database for the processing to be used by the Benefits Administration processing.

Human Resources Manage Base Compensation and Budgeting

Manage Base Compensation and Budgeting delivers the one plug-in.

SP_DIAGNOSTICS_SALARY_STEP

The SP_DIAGNOSTICS_SALARY_STEP plug-in (Salary Step Details):

- Uses the following additional parameters:
 - SetID
 - Sal Admin Plan
 - Grade
 - Effective Date
- Provides a diagnosis of salary step details for a given plan.

ePerformance

ePerformance delivers two plug-ins:

- Document Templates

Note. This diagnostic script can also be used with Manage Employee Reviews.

- Debug/Trace Results

Document Templates

The Document Templates plug-in:

- Uses the following parameters:
 - Template ID
 - Effective Date
- Provides a diagnosis of the structure of the document template that created a particular document. This provides critical information to the support analyst for resolving an issue with a document. These tables, all keyed by template ID and effective date, are dumped:
 - Template Header (EP_TMPL_DEFN)
 - Process Participant Roles (EP_TMPL_PARTIC)
 - Document Sections (EP_TMPL_SECTION)
 - Role-Level Rules (EP_TMPL_ROLE)
 - Common Content: Items (EP_TMPL_ITEM)
 - Common Content: SubItems (EP_TMPL_SUBITEM)

Debug/Trace Results

The Debug/Trace Results plug-in:

- Uses the following parameters:
 - Document ID
 - User Role
- Provides a diagnosis of the Debug/Trace results table view (EP_DBG_DIAG_VW) that is created by the built-in Debug/Trace facility. This information is keyed by document ID and user role.

Additionally, a Send to PeopleSoft link on the Calculation Debug/Trace inquiry page enables the user to navigate to the Application Diagnostics launch page and send this data to PeopleSoft.

Global Payroll

Global Payroll provides the following plug-ins:

- GP_DIAG_000
- GP_DIAG_005
- GP_DIAG_010
- GP_DIAG_020
- GP_DIAG_030
- GP_DIAG_040
- GP_DIAG_100

- GP_DIAG_200

GP_DIAG_000

The GP_DIAG_000 plug-in (Return General Information):

- Uses the following parameters:
 - Operating System
 - 3-char ISO Country Code
- Provides a diagnosis of the following tables and information:
 - PSRELEASE: Release information.
 - PSOPTION: License information.
 - PS_INSTALLATION: HRMS installation information.
 - PS_GP_PIN: Last element number.
 - PS_GP_INSTALLATION: Global Payroll installation information.
 - PS_MAINTENANCE_LOG: Bundles and fixes applied to the database.
 - PS_GP_COUNTRY: Country information.

Note. If COUNTRY parameter is empty, the system returns country information for the calendar group. If COUNTRY parameter is equal to *ALL*, the system returns all countries.

GP_DIAG_005

The GP_DIAG_005 plug-in (Return Log File):

- Uses the full file path and file name to the location of file as a parameters.
- Provides a diagnosis of the file specified in the "Full Path + the log file name" field.

GP_DIAG_010

The GP_DIAG_010 plug-in (Return SQL Stored Statement):

- Uses the COBOL Program Name as a parameter.
- Provides a diagnosis of PSSQLSTMT_TBL, which returns all SQL statements used for the COBOL name specified in the COBOL Program Name field.

GP_DIAG_020

The GP_DIAG_020 plug-in (Return AE Program Definition):

- Uses the Application Engine Name as a parameter.

- Provides a diagnosis of the following Application Engine information:
 - PSAEAPPLDEFN
 - PSAEAPPLSTATE
 - PSAESECTDTLDEFN
 - PSAESTEPDEFN
 - PSAESTEPMSGDEFN
 - PSAESTMTDEFN
 - PSSQLTEXTDEFN

GP_DIAG_030

The GP_DIAG_030 plug-in (Return Element Definition):

- Uses Element Name 1 - 5 as a parameter.

- Provides a diagnosis of the following tables, based on the element type returned, for each of up to five element definitions:
 - Element name information: PS_GP_PIN
 - Take Element: GP_ABS_TAKE, GP_ABS_TAKE_CFG, GP_ABS_TAKE_DAY, GP_ABS_TAKE_ELM, GP_ABS_TK_FCST
 - Accumulator Element: GP_ACCUMULATOR, GP_ACM_MBR
 - Array Element: GP_ARRAY, GP_ARRAY_FLD, GP_ARRAY_KEY, GP_ARRAY_PRC
 - Bracket Element: GP_BRACKET
 - Count Element: GP_COUNT
 - Date Element: GP_DATE
 - Duration Element: GP_DURATION, GP_DUR_GNRN
 - Earning - Deduction Element: GP_ERN_DED, GP_ELM_DFN_SOVR, GP_PIN_CMPNT, GP_RCP_DED
 - Element Group Name: GP_ELEM_GRP, GP_ELEM_GRP_MBR
 - Fictitious Calculation Element: GP_FC_IN, GP_FC_OUT, GP_FC_OUT_DTL, GP_FC_SEG, GP_FC_TBL
 - Formula Element: GP_FORMULA, GP_FORMULA_CLUE, GP_FORMULA_DTL, GP_FORMULA_VAR
 - Generation Control Element: GP_GCTL, GP_GCTL_DTL
 - Historical Rule Element: GP_HIST_ELEM, GP_HIST_RULE
 - Process Element: GP_PROCESS, GP_PROCESS_DTL
 - Proration Element: GP_PRORATION
 - Rate Code Element: GP_RATE_CODE
 - Section Element: GP_SECTION, GP_SECTION_DTL
 - System Element: GP_SYSTEM_PIN
 - Variable Element: GP_VARIABLE
 - Write Array Element: GP_WA_ARRAY, GP_WA_FLD

GP_DIAG_040

The GP_DIAG_040 plug-in (Return Array/WA Audit):

- Uses the 3 char ISO Country Code as a parameter.

- Provides a diagnosis of the following tables and information:
 - PS_GP_DIAG_ARRAY_D: All arrays of a country not synchronized with the record definition.
 - PS_GP_DIAG_WA_D: All write arrays of a country not synchronized with the record definition.

GP_DIAG_100

The GP_DIAG_100 plug-in (Return Organizations Setup Data):

- Uses the Calendar Group ID parameter.
- Provides a diagnosis of the following tables and information:
 - PS_GP_PYENT: Pay entity information.
 - PS_GP_PYENT_DTL: Pay entity detail information.
 - PS_GP_CAL_RUN: Calendar group information.
 - PS_GP_CAL_RUN_DTL: Calendar group detail information.
 - PS_GP_CALENDAR: Calendar information.
 - PS_GP_RUN_TYPE: Run type information.

GP_DIAG_200

The GP_DIAG_200 plug-in (Return Employee Information):

- Uses the following parameters:
 - EmplID
 - Employee Record Number
 - Calendar Group ID
 - Calendar ID

- Provides a diagnosis of the following tables and information:
 - PS_GP_DIAG_JOB_D: Payroll information (but no compensation data).
 - PS_GP_DIAG_EMPL_D: Dates.
 - PS_GP_DIAG_CTR1_D: Contract information.
 - PS_WKFCNT_TYPE: Related contract information.
 - PS_GP_DIAG_CTR2_D: Related contract information.
 - PS_GP_PAYEE_DATA: Payee information.
 - PS_GP_DIAG_PI_D: Positive input (but no amount data).
 - PS_GP_NET_DIST_DTL: Banking and payment information.
 - PS_GP_RTO_TRGR: Trigger information.
 - PS_GP_SEG_TRGR: Related trigger information.
 - PS_GP_DIAG_P_SEG_D: Payroll result headers (but no gross and net data).
 - PS_GP_DIAG_MSG_D: Payroll error messages.

Time and Labor

Time and Labor provides the following plug-ins:

- TL_DIAGNOSTICS_TA_EMPL_PAY
- TL_DIAGNOSTICS_TA_EMPL_GRP
- TL_DIAGNOSTICS_TA_TACODE
- TL_DIAGNOSTICS_TA_RPTD_TIME
- TL_DIAGNOSTICS_PT_INV_PAYTIME
- TL_DIAGNOSTICS_PT_DUP_SEQ
- TL_DIAGNOSTICS_PT_INV_OFFSET
- TL_DIAGNOSTICS_SETUP_TIMEPRD
- TL_DIAGNOSTICS_SETUP_TIMEZONE
- TL_DIAGNOSTICS_SETUP_RULEPGM
- TL_DIAGNOSTICS_SETUP_EXWRKGRP
- TL_DIAGNOSTICS_SETUP_TCD

TL_DIAGNOSTICS_TA_EMPL_PAY

Payable time for employees are displayed for the given date range. The exceptions created (if any) for that date range are also displayed.

The TL_DIAGNOSTICS_TA_EMPL_PAY plug-in:

- Uses the following parameters:
 - EmplID
 - Employee Record
 - Start Date
 - End Date
- Provides a diagnosis of:
 - SQL for the View: TL_DU_TA_PT_VW


```
SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TRC, A.TL_QUANTITY, A.PAYABLE_STATUS
FROM PS_TL_PAYABLE_TIME A
```
 - SQL for the View: TL_DU_TA_EX_VW


```
SELECT A.EXCEPTION_ID, A.EMPLID, A.EMPL_RCD, A.DUR, A.EXCEPTION_SOURCE,
A.MSG_DATA1 FROM PS_TL_EXCEPTION A
```
 - Create SQL:


```
SELECT %DateOut(EARLIEST_CHGDT), TA_STATUS FROM PS_TL_TR_STATUS WHERE
EMPLID= :1 AND EMPL_RCD = :2
```

TL_DIAGNOSTICS_TA_EMPL_GRP

If the Run Control ID has a dynamic group included, the list of employees in the group is resolved. These employees are checked if they are Active between the Process Through Date and Process Through Date – 31 days.

The TL_DIAGNOSTICS_TA_EMPL_GRP plug-in:

- Uses the Run Control ID as a parameter.

- Provides a diagnosis of:

- SQL for the View: TL_DU_TA_GRP_VW

```
SELECT A.EMPLID, A.EMPL_RCD, A.EFFDT, A.EMPL_STATUS FROM PS_JOB A
```

- SQLExec:

```
SELECT %DATEOUT(A.THRUDATE) FROM PS_TL_TA_RUNCTL A WHERE  
A.RUN_CNTL_ID=:1 AND A.OPRID=:2
```

- CreateSQL:

```
SELECT DISTINCT A.EMPLID, A.EMPL_RCD FROM PS_JOB A WHERE (EXISTS (SELECT  
'X' FROM PS_TL_RUN_CTRL_GRP B WHERE B.RUN_CNTL_ID=:1 AND B.GROUP_ID='Z'  
AND B.INCLUD_EXCLUDE_IND='+' AND A.EMPLID=B.EMPLID AND  
A.EMPL_RCD=B.EMPL_RCD ) OR EXISTS(SELECT 'X' FROM PS_TL_GROUP_DTL B1  
WHERE B1.GROUP_ID IN (SELECT B.GROUP_ID FROM PS_TL_RUN_CTRL_GRP B WHERE  
B.RUN_CNTL_ID=:1 AND B.GROUP_ID <> 'Z') AND A.EMPLID=B1.EMPLID AND  
A.EMPL_RCD=B1.EMPL_RCD)) AND NOT EXISTS(SELECT 'X' FROM  
PS_TL_RUN_CTRL_GRP B2 WHERE B2.RUN_CNTL_ID=:1 AND B2.GROUP_ID='Z' AND  
B2.INCLUD_EXCLUDE_IND='-' AND A.EMPLID=B2.EMPLID AND  
A.EMPL_RCD=B2.EMPL_RCD) AND EMPL_STATUS='A' AND (A.EFFDT =(SELECT  
MAX(EFFDT) FROM PS_JOB J1 WHERE A.EMPLID=J1.EMPLID AND A.EMPL_RCD=  
J1.EMPL_RCD AND J1.EFFDT <=%DATEIN(:2) ) OR A.EFFDT =(SELECT MAX(EFFDT)  
FROM PS_JOB J2 WHERE A.EMPLID=J2.EMPLID AND A.EMPL_RCD=J2.EMPL_RCD AND  
J2.EFFDT >%DATEIN(:2) AND J2.EFFDT <=%DATEIN(:3) AND J2.EMPL_STATUS='A'))
```

TL_DIAGNOSTICS_TA_TACODE

The TL_DIAGNOSTICS_TA_TACODE plug-in (listing of SQL Object IDs and SQL statements used in the time administration process):

- Uses the SQL Object ID as parameter.
- Provides a diagnosis of the SQL for the View: TL_DU_TA_SQL_VW.

```
SELECT A.SQLID, A.SQLTEXT FROM PSSQLTEXTDEFN A
```

TL_DIAGNOSTICS_TA_RPTD_TIME

This lists the reported time details of an employee in a give date range based on the reported status (input parameter). If the EmplID is not given as input this lists all the employees with the specific reported status in the given date range.

The TL_DIAGNOSTICS_TA_RPTD_TIME plug-in:

- Uses the following parameters:
 - EmplID
 - Reported Time Status
 - Start Date
 - End Date

- Provides a diagnosis of:

- SQL for the View: TL_DU_TA_RPT_VW

```
SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.PUNCH_TYPE, A.PUNCH_DTTM,
A.TASKGROUP, A.TASK_PROFILE_ID, A.TRC, A.TL_QUANTITY, B.XLATLONGNAME
FROM PS_TL_RPTD_TIME A, XLATTABLE_VW B WHERE B.FIELDNAME =
'REPORTED_STATUS' AND B.FIELDVALUE = A.REPORTED_STATUS
```

- SQL for the View: TL_DU_TA_RPL_VW

```
SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.PUNCH_TYPE, A.PUNCH_DTTM,
A.TASKGROUP, A.TASK_PROFILE_ID, A.TRC, A.TL_QUANTITY, B.XLATLONGNAME
FROM PS_TL_RPTD_TIME A, XLATTABLE_LNG B WHERE B.FIELDNAME =
'REPORTED_STATUS' AND B.FIELDVALUE = A.REPORTED_STATUS
```

- SQLExec:

```
SELECT A.XLATLONGNAME FROM XLATTABLE_VW A WHERE
A.FIELDNAME='REPORTED_STATUS' AND %Upper(A.XLATLONGNAME) = :1
```

- SQLExec:

```
SELECT A.XLATLONGNAME FROM XLATTABLE_LNG A WHERE
A.FIELDNAME='REPORTED_STATUS' AND %Upper(A.XLATLONGNAME) = :1
```

- Create SQL:

```
SELECT A.XLATLONGNAME FROM XLATTABLE_VW A WHERE
A.FIELDNAME='REPORTED_STATUS'
```

- Create SQL:

```
SELECT A.XLATLONGNAME FROM XLATTABLE_LNG A WHERE
A.FIELDNAME='REPORTED_STATUS'
```

TL_DIAGNOSTICS_PT_INV_PAYTIME

The TL_DIAGNOSTICS_PT_INV_PAYTIME plug-in (lists payable time where payable status is rejected by payroll for a date range):

- Uses the following parameters:
 - Start Date
 - End Date

- Provides a diagnosis of:

- SQL for the View: TL_DU_PT_PT_VW

```
SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TL_QUANTITY, B.XLATSHORTNAME FROM
PS_TL_PAYABLE_TIME A, XLATTABLE_VW B WHERE ((A.PAYABLE_STATUS='RP' AND
A.PAYROLL_REQ_NUM=0) OR (A.PAYABLE_STATUS='CL' AND A.PAYROLL_REQ_NUM
=0) OR (A.PAYABLE_STATUS='TP' AND A.PAYROLL_REQ_NUM=0) OR
(A.PAYABLE_STATUS='SP' AND A.PAYROLL_REQ_NUM <>0) ) AND
B.FIELDNAME='PAYABLE_STATUS' AND B.FIELDVALUE = A.PAYABLE_STATUS
```

- SQL for the View: TL_DU_PT_PTL_VW

```
SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.TL_QUANTITY, B.XLATSHORTNAME FROM
PS_TL_PAYABLE_TIME A, XLATTABLE_LNG B WHERE ((A.PAYABLE_STATUS='RP'
AND A.PAYROLL_REQ_NUM=0) OR (A.PAYABLE_STATUS='CL' AND
A.PAYROLL_REQ_NUM=0) OR (A.PAYABLE_STATUS='TP' AND A.PAYROLL_REQ_NUM
=0) OR (A.PAYABLE_STATUS='SP' AND A.PAYROLL_REQ_NUM <>0) ) AND
B.FIELDNAME = 'PAYABLE_STATUS' AND B.FIELDVALUE = A.PAYABLE_STATUS
```

TL_DIAGNOSTICS_PT_DUP_SEQ

The TL_DIAGNOSTICS_PT_DUP_SEQ plug-in (lists duplicate sequence numbers for the offsets) provides a diagnosis of SQL for the View: TL_DU_PT_SEQ_VW:

```
SELECT A.SEQ_NBR, COUNT(*) FROM PS_TL_PAYABLE_TIME A GROUP BY A.SEQ_NBR
HAVING COUNT(*) > 1
```

TL_DIAGNOSTICS_PT_INV_OFFSET

The TL_DIAGNOSTICS_PT_INV_OFFSET plug-in (lists the Payable time offsets rejected by Payroll) provides a diagnosis of SQL for the View: TL_DU_PT_OFF_VW:

```
SELECT A.EMPLID, A.EMPL_RCD, A.DUR, A.SEQ_NBR, A.TL_QUANTITY, A.PAYABLE_STATUS,
A.RECORD_ONLY_ADJ, A.ORIG_SEQ_NBR FROM PS_TL_PAYABLE_TIME A WHERE EXISTS
(SELECT 'X' FROM PS_TL_PAYABLE_TIME C WHERE A.EMPLID=C.EMPLID AND A.EMPL_RCD
=C.EMPL_RCD AND A.DUR=C.DUR AND A.ORIG_SEQ_NBR=C.SEQ_NBR AND C.ORIG_SEQ_NBR
<> 0 AND C.RECORD_ONLY_ADJ = 'N' AND C.PAYABLE_STATUS NOT IN ('ES','NA') AND
C.TL_QUANTITY > 0 AND NOT EXISTS (SELECT 'X' FROM PS_TL_PAYABLE_TIME A2 WHERE
A2.EMPLID=C.EMPLID AND A2.EMPL_RCD=C.EMPL_RCD AND A2.DUR=C.DUR AND
A2.ORIG_SEQ_NBR=C.SEQ_NBR AND A2.TL_QUANTITY < 0)) OR EXISTS (SELECT 'X' FROM
PS_TL_PAYABLE_TIME C1 WHERE A.EMPLID=C1.EMPLID AND A.EMPL_RCD=C1.EMPL_RCD
AND A.DUR=C1.DUR AND A.ORIG_SEQ_NBR=C1.SEQ_NBR AND C1.ORIG_SEQ_NBR=0 AND
C1.RECORD_ONLY_ADJ = 'N' AND C1.PAYABLE_STATUS NOT IN ('ES','NA') AND EXISTS
(SELECT 'X' FROM PS_TL_PAYABLE_TIME A1 WHERE A1.EMPLID=C1.EMPLID AND
A1.EMPL_RCD=C1.EMPL_RCD AND A1.DUR=C1.DUR AND A1.TL_QUANTITY < 0 AND
A1.ORIG_SEQ_NBR=C1.SEQ_NBR))
```

TL_DIAGNOSTICS_SETUP_TIMEPRD

The plug-in displays the Period IDs that are not built over the given date range, along with the workgroup from PS_TL_WRKGRP_TBL.

The TL_DIAGNOSTICS_SETUP_TIMEPRD plug-in:

- Uses the following parameters:
 - Start Date
 - End Date
- Provides a diagnosis of SQL for the View: TL_DU_ST_TP_VW:

```
SELECT PERIOD_ID, WORKGROUP FROM PS_TL_WRKGRP_TBL
CreateSQL:SELECT
DISTINCT A.PERIOD_ID FROM PS_TL_TIME_PERIODS A WHERE A.PERIOD_ID NOT IN
(SELECT DISTINCT B.PERIOD_ID FROM PS_TL_CALENDAR B WHERE
((%DateIn(:1)>B.START_DT AND %DateIn(:2)<B.END_DT) OR (%DateIn(:1)<B.END_DT AND
%DateIn(:2) >B.START_DT)))
```

TL_DIAGNOSTICS_SETUP_TIMEZONE

The Plug-in obtains the time zone of the employee using the input EmplID and displays the time zone offsets within the given date range.

The TL_DIAGNOSTICS_SETUP_TIMEZONE plug-in:

- Uses the following parameters:
 - EmplID
 - Start Date
 - End Date
- Provides a diagnosis of SQLExec:


```
SELECT B.TIMEZONE FROM PS_TL_EMPL_DATA B WHERE B.EMPLID= :1 AND
B.EFFDT=(SELECT MAX(EFFDT) FROM PS_TL_EMPL_DATA A WHERE A.EMPLID=:1 AND
A.EFFDT<=%DateIn(:2) AND A.TIME_RPTG_STATUS='A')
```

TL_DIAGNOSTICS_SETUP_RULEPGM

The plug-in is used to display the list of workgroups that do not have Rule Programs associated to them.

The TL_DIAGNOSTICS_SETUP_RULEPGM plug-in provides a diagnosis of SQL for the View: TL_DU_ST_RUL_VW.

```
SELECT A.WORKGROUP FROM PS_TL_WRKGRP_TBL A WHERE A.RULE_PGM_ID = ''
```

TL_DIAGNOSTICS_SETUP_EXWRKGRP

The plug-in displays the list of all exception time reporter type workgroups with missing Schedule ID. Workgroups of exception time reporter type are displayed if a Schedule ID is not attached to them.

The TL_DIAGNOSTICS_SETUP_EXWRKGRP plug-in provides a diagnosis of SQL for the View: TL_DU_ST_SCH_VW.

```
SELECT A.WORKGROUP FROM PS_TL_WRKGRP_TBL A WHERE A.TIME_RPTG_TYPE = 'E' AND
A.SCHEDULE_ID=' '
```

TL_DIAGNOSTICS_SETUP_TCD

The plug-in verifies the TCD setup data. For the given TCD ID input, the plug-in traces the TCD (message node name), message name, message status, transaction status and type of transaction. It also verifies checks for the Integration type. Displays whether the Inbound, outbound directories are specified for Flat file type of integration.

The TL_DIAGNOSTICS_SETUP_TCD plug-in:

- Uses the TCD ID as a parameter.
- Provides a diagnosis of:
 - SQL for the View: TL_DU_ST_TCD_VW

```
SELECT A.RQSTMSGNAME, A.MSGNODENAME, B.MSGSTATUS, C.XLATSHORTNAME,
A.EFF_STATUS FROM PSNODETRX A, PMSGDEFN B, XLATTABLE_VW C WHERE
A.RQSTMSGNAME=B.MSGNAME AND C.FIELDNAME='TRXTYPE' AND
C.FIELDVALUE=A.TRXTYPE
```

- CreateSQL:

```
SELECT A.XLATSHORTNAME, A.FIELDVALUE FROM XLATTABLE_VW A WHERE
A.FIELDNAME = 'INTEGRATION_TYPE' AND A.FIELDVALUE=(SELECT
B.INTEGRATION_TYPE FROM PS_TL_TCDDEF_TBL B WHERE B.TCD_TYPE_ID=:1 AND
B.EFFDT = (SELECT MAX(B1.EFFDT) FROM PS_TL_TCDDEF_TBL B1 WHERE
B1.TCD_TYPE_ID=:1))
```

- CreateSQL:

```
SELECT A.XLATSHORTNAME, A.FIELDVALUE FROM XLATTABLE_LNG A WHERE
A.FIELDNAME = 'INTEGRATION_TYPE' AND A.FIELDVALUE=(SELECT
B.INTEGRATION_TYPE FROM PS_TL_TCDDEF_TBL B WHERE B.TCD_TYPE_ID =:1 AND
B.EFFDT=(SELECT MAX(B1.EFFDT) FROM PS_TL_TCDDEF_TBL B1 WHERE
B1.TCD_TYPE_ID=:1))CreateSQL:SELECT FILE_OUTPUT_DIR, FILE_ARCHIVE_DIR FROM
PS_TL_INSTALLATION
```

Appendix C

Delivered Workflows for PeopleSoft HRMS

This appendix provides general workflow information and discusses the delivered workflows for the following PeopleSoft Enterprise Human Resources applications:

- Administer Training
- Administer Workforce
- Manage Base Compensation and Budgeting
- Manage Employee Reviews
- Manage French Profit Sharing
- Manage French Public Sector
- Manage Professional Compliance
- Manage Variable Compensation
- Plan Careers

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

General Workflow Information

Many tasks that you perform are parts of larger tasks that involve several steps and people working together. For example, when you hire an employee using PeopleSoft Human Resources, you start a process that involves several individuals:

- One who signs up the employee for benefits.
- One who reviews and approves equipment requisitions.
- One who enters tax information for payroll.

PeopleSoft Workflow automates this entire process as well as other processes.

Note. While several workflow business processes are delivered with your HRMS system, the system is delivered with all workflow turned off. You must activate PeopleSoft Workflow to use it.

Note. You must set up workflow for PeopleSoft self service applications using pages on the Set Up HRMS, Common Definitions, Self Service menu.

See [Chapter 34, "Setting Up and Working with Self-Service Transactions," Using Workflow with Self-Service Transactions, page 852.](#)

Creating Role Users Using a Message Agent

PeopleSoft HRMS includes a message agent that enters all of people with an active job record as role users automatically.

While you could manually assign each employee to a role on the User Profile component, this process is tedious if you're designating many employees as users. Some workflow processes could involve every individual in your organization at one time or another. Using the message agent is a faster way to transform your employees into workflow role users.

Using the Dynamic Role User Queries

Use one of the three dynamic Structured Query Reports (SQRs) that query your live human resources database when a workflow involving a Supervisor role is triggered. You select and assign a role user query to the Supervisor routings based on whether you're driving your PeopleSoft Human Resources system by full, partial, or no Position Management. The following table lists the role queries from which you can select. Select the one that is appropriate for your human resources implementation.

<i>Functionality</i>	<i>Query</i>
Full Position Management	[ROLE] Supervisor-Full Posn Mgt (supervisor - full position management)
Position Management turned off	[ROLE] Supervisor-No Posn Mgt
Partial Position Management	[ROLE] Supervisor-Part Posn Mgt

Using the dynamic role user query method ensures that the Supervisor role user assignment is as accurate as your live human resources data. The dynamic query also frees you from maintaining two sets of human resources supervisor data, one in your human resources system and the other in the Role User Table.

The default query is [ROLE] Supervisor-Part Posn Mgt Role User Query. All generic PeopleTools workflows use that query. The query does not run against your live human resources database, but against the Role User Table.

To use one of the other Supervisor role user queries in PeopleSoft Workflow, you must modify all routings involving supervisors.

Delivered Workflows for Administer Training

This section discusses PeopleSoft Human Resources Administer Training workflows. The workflows are listed alphabetically by workflow name.

Approve Training Request Event

This section discusses the approve training request event workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to HR Technical/Administrator notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	HR Technical/Admin
Email Template	Approve Training WL
Business Process	Approve Training Request
Business Activity	APPROVE_TRAINING_REQ_USF
Business Event	Approve Training Request Event

Authorize Training Event

This section discusses the authorize training event workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to Training Administrator for authorization.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic
Role	Training Administrator
Email Template	Authorize Training Request WL
Business Process	Authorize Training Request
Business Activity	AUTHORIZE_TRAINING_REQ_USF
Business Event	Authorize Training Event

Request Training Event (CSE)

This section discusses the request training event (cse) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	COURSE_ENROLLMENT1
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (CSE)
Business Process	Course Session Enrollment
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (CSE)

Request Training Event (SCE)

This section discusses the request training event (sce) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	CRSE_ENRL_WL
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (SCE)
Business Process	Student Course Enrollment
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (SCE)

Request Training Event (ST)

This section discusses the request training event (st) workflow.

Description

Event Description	Upon enrolling a student for a course, a worklist item is sent to the supervisor (part position management) notifying them of the training request for review and approval.
Notification Method	Worklist

Workflow Objects

Event	TRN_STUDNT_CRS_DT2
Workflow Action	Automatic

Role	Supervisor-Part Posn Mgt
Email Template	Request Training WL (ST)
Business Process	Student Training
Business Activity	REQUEST_TRAINING_USF
Business Event	Request Training Event (ST)

Send Confirmation

This section discusses the send confirmation workflow.

Description

Event Description	Upon a student being enrolled in a class, the student will receive an email with the details of the course in which he/she is enrolled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Confirmation
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Confirmation

Send Cancellation

This section discusses the send cancellation workflow.

Description

Event Description	When a course has been cancelled, the enrolled students will receive email with the details of the course in which he/she is enrolled and that has been cancelled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Cancellation
Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Cancellation

Send Rescheduling

This section discusses the send rescheduling workflow.

Description

Event Description	When a course has been rescheduled, the enrolled students will receive email with the new schedule of the course in which he/she is enrolled.
Notification Method	Email

Workflow Objects

Event	RUNCTL_TRN001
Workflow Action	Automatic
Role	Training Administrator
Email Template	Student Rescheduling

Business Process	Training Letters
Business Activity	Report Training Data
Business Event	Send Rescheduling

Delivered Workflows for Administer Workforce

This section discusses Administer Workforce workflows. The workflows are listed alphabetically by workflow name.

(USF) 60 Day Review

This section discusses the 60 Day Review workflow.

Description

Action Description	Upon the '60 Day Tenure Notices' process being run to identify Tenure Conversions, a worklist item is sent to the supervisor(s) of all employees who will reach their Tenure Conversion dates within the next 60 days. Upon the '60 Day Probation Term Notices' process being run to identify Probation Terms, a worklist item is sent to the supervisor(s) of all employees who will reach their Probation Termination dates within the next 60 days. Upon the '60 Day WGI Notices' process being run to identify WGI's (Within Grade Increases), a worklist item is sent to supervisor(s) of all employee for whom WGI's are due within the next 60 days.
Notification Method	Worklist

Workflow Objects

Event	GVT_60_DAY_REV
Workflow Action	Manual
Role	Supervisor-Part Posn Mgt
Email Template	Ten Conv WL Notice PT WL Notice WGI WL
Business Process	60 Day Notice Select

Business Activity	ROUTE_TO_WORKLIST
Business Event	Notice Ten Conv Event Notice Prob Term Event Notice WGI Event

(USF) Generic

This section discusses the Generic workflow.

Description

Event Description	This is a common email and workflow event for administrator self-service notifications.
Notification Method	Email, Worklist

Workflow Objects

Event	EE_HR_PROC
Workflow Action	Manual
Role	Roleuser By EMPLID
Email Template	Email Notification FE_HR_ADMIN_WL
Business Process	FE_NOTIFY_HR_ADMIN
Business Activity	FE_NOTIFY_HR_ADMIN
Business Event	Email Notification Notify HR Admin

Hire Employees

This section discusses the Hire Employee workflow.

Description

Event Description	The business event, Hire Employee, is triggered whenever a new employee is hired. The entire Hire Employee business process takes place within this one event. The system utilizes workflow to send notification about the new hire to various roles within the organization required to take action. Upon hiring an employee in France, the system also routes email/worklist items to the Personal Administrator for various events.
Action Description	Benefits Administrator - The system directs an email to the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire. Facilities Manager - The system directs an email to the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire. (USF) MIS Administrator - Sends an email to the MIS Administrator to let him/her know about the new hire. Login ID's and/or PC equipment can be set up appropriately. Payroll Administrator - The system directs an email to the Payroll Administrator to the Update Deduction Data activity for the new hire. Training Administrator - The system directs an email to the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes. Variable Compensation Administrator - The system routes an email to the Variable Compensation Administrator to let him/her know about the new hire and determine if this new hire can be included into a compensation plan. Benefits Administrator - The system directs a worklist item to the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire. Facilities Manager - The system directs a worklist item to the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire. Payroll Administrator - The system directs a worklist item to the Payroll Administrator to the Update Deduction Data activity for the new hire. Training Administrator - The system directs a worklist item to the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes. An email is sent to the Personal Administrator (FRA) to remind them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date. A worklist item is sent to the HR Administrator (FRA) to remind them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date.
Action Description (continued)	An email is sent to the HR Administrator (FRA) when an employee is hired into the system with a start date in the future. This reminder warns them that the Single Hiring Statement should be sent with a minimum set of mandatory information prior the hire date. A worklist item is sent to the HR Administrator (FRA) when an employee is hired into the system and additional information regarding the employee is needed.
Notification Method	Email, Worklist

Workflow Objects

Event	JOB_DATA_EMP EE_HIRE
Workflow Action	Automatic
Role	Benefits Administrator Facilities Administrator MIS Administrator Payroll Administrator Training Administrator Variable Compensation Administrator HR Administrator FRA Worklist Administrator
Email Template	Benefits Administrator Facilities Administrator MIS Administrator Payroll Administrator Training Administrator VC_HIRE_EMAIL Single Hiring Statement SHS_EMAIL_DELAY Complete Employee Info
Business Process	Administer Workforce Recruit Employees ADMINISTER_WORKFORCE_USF REPORT_REGULATIONS
Business Activity	Hire Workforce Hire Workforce (USF) HIRE_WORKFORCE_FRA
Business Event	Hire Employee VC_HIRE_EVENT SHS_HIRE_EVENT SHS_HIRE_DELAY SHS_HIRE_INFO

Maintain Job Data

This section discusses the Maintain Job Data workflow.

Description

Action Description	Upon a change to an employee's service date in the system, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. When a job action change has been performed on an employee with multiple jobs, a worklist item is sent to the Benefits Administrator notifying them to review the Primary Job indicators and Flags. An email is sent to notify the Variable Compensation Administrator to review the changes and take appropriate action if necessary. Upon a change to an employee's Benefits System, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. When a change is made to an employee's Job record, if the action added or changed matches the Stock Action list (defined in Stock Action Reasons), then a worklist item is sent to the Stock Administrator to take appropriate action. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the Works Council for review. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email is sent to notify the employee. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the new manager informing them of the decision. Works Council Specific - Upon the HR Administrator making a decision on a job change request, an email and worklist item is sent to the current manager informing them of the decision. Works Council Specific - When the HR Administrator requests a job change for an employee, the request is routed via email and worklist item to the Works council for review and approval.
Notification Method	Email, Worklist

Workflow Objects

Event	JOB_DATA WC_JOB_CHG_REQ_HR EE_HR_PROC
Workflow Action	Automatic

Role	Benefits Administrator VC Administrator Stock Administrator Roleuser By EMPLID Works Council Representative
Email Template	Benefits Administrator Benefits Administrator1 Benefits Administrator2 Benefits Administrator3 Variable Comp Administrator Stock Admin Works Council Employee New Manager Current Manager Works Council
Business Process	Administer Workforce ADMINISTER_WORKFORCE_USF WORKS_COUNCIL_NOTIFICATION ADMINISTER_STOCK
Business Activity	Maintain Job Data Maintain Job Data (USF) WC_HR_DECISION WC_RJC_HR STOCK_ACTION
Business Event	Change in Service Date MultiJob Change Job Change Primary Jobs Audit Change in Benefits System Stock_Action_List Notify WC Notify EE Notify New Manager Notify Current Manager

Maintain Personal Data

This section discusses the Maintain Personal Data workflow

Description

Action Description	Upon a change to an employee's birth date in the system, an email and worklist item are sent to the Benefits Administrator so any further processing on the Benefits side can occur. (CAN) Upon a change to an employee's Province of residence, an email and worklist item are sent to the Payroll Administrator so any further processing on the Payroll side can occur. Upon a change to an employee's state of residence, an email and worklist item are sent to the Payroll Administrator so any further processing on the Payroll side can occur.
Notification Method	Email, Worklist

Workflow Objects

Event	PERSONAL_DATA EE_HR_PROC
Workflow Action	Automatic
Role	Benefits Administrator Payroll Administrator
Email Template	Benefits Administrator Payroll Administrator Payroll Administrator1
Business Process	Administer Workforce ADMINISTER_WORKFORCE_USF
Business Activity	Maintain Personal Data Maintain Personal Data (USF)
Business Event	Change in Birth Date Change Province in Canada Change State in U.S.

(USF) PAR Processing

This section discusses the PAR Processing workflow

Description

Action Description	Upon the First Authorizer approving a PAR, a worklist item is sent to the Second Authorizer for review/approval as the next step in the process. When a request is routed to the First Authorizer for approval and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to the First Authorizer for approval and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. Upon the Second Authorizer approving a PAR, a worklist item is sent to the final approver in the process for Approval and Signature. When a request is routed to the Second Authorizer for approval and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to the Second Authorizer for approval and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. When a request is routed to HR for final approval and signature, a worklist item is sent to the HR Administrator notifying them of the transaction to be processed. When a request is disapproved or returned by the final approver, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is disapproved or returned by the final approver, an email is sent to the employee with requested information or notifying them of the disapproved request. Upon an employee submitting a PAR request, a worklist item is sent to the employee's manager for first level approval. When a request is routed to HR for approval and final processing and is disapproved or returned, a worklist item is sent to the employee's manager with requested information or notifying them of the disapproved request. When a request is routed to HR for approval and final processing and is disapproved or returned, an email is sent to the employee with requested information or notifying them of the disapproved request. When a manager-submitted request is disapproved, a worklist item is sent to the employee's manager notifying them of the disapproval. When a manager-submitted request is disapproved, an email is sent to the employee notifying them of the disapproval. When an employee's manager submits a PAR request for an employee, a worklist item is sent to the first level approver (First Authorizer) for review and approval.

Action Description (continued)	Once the Retro WGI request has passed the authorization and approval processes, it goes directly to the Human Resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the Retro WGI for that employee. Once the Manual WGI request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the Manual WGI for that employee. Once the Probation Termination request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the appropriate manager once HR has completed processing. Once the Tenure Conversion request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the appropriate manager once HR has completed processing. Once a WGI request has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A worklist item is sent to the employee's manager once HR has completed processing of the WGI for that employee.
Notification Method	Email, Worklist

Workflow Objects

Event	EE_1ST_AUTH EE_2ND_AUTH EE_APPROVAL EE_EMPL_REQ EE_HR_PROC EE_SUP_REQ GVT_COMP_ACTN
Workflow Action	Automatic
Role	PAR Authorizer Supervisor-Part Posn Mgt Roleuser by EmplID Personnel Administrator PAR Supervisor

Email Template	2nd Authorizers Worklist Supervisor Worklist EMail Employee Approval Signature Worklist HR Worklist 1st Authorizers Worklist Retro WGI WL Manual WGI WL Except TC WL PT Comp WL TC Comp WL WGI Comp WL
Business Process	Perform 1st Authorization 1st Auth Disapprove/Return Perform 2nd Authorization 2nd Auth Disapprove/Return Perform Approval/Signature Approver Disapproval/Return Enter Employee Request HR Process Disapprove/Return Supervisor Disapproval/Return Enter Supervisor Request Processed Action
Business Activity	1st Authorization Disapprove/Return 2nd Authorization Approval/Signature Employee Request Supervisor Request PERFORM_AUTO_ACTION

Business Event	Route to 2nd Authorization Route Disapproval/Return Route for Approval Signature Route to HR Route Request to Supervisor Route for 1st Authorization Retro WGI Event Manual WGI Event Except TC Review Notice PT Complete Notice TC Complete Notice WGI Complete

Terminate Employee

This section discusses the Terminate Employee workflow.

Description

Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.

Action Description	This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the designated person notifying them that the employee has been terminated so appropriate action can be taken to review profit sharing for the employee. This event sends a worklist item to the designated person notifying them that the employee has been terminated so appropriate action can be taken to review profit sharing for the employee. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the terminating employee if that employee has profit-sharing rights notifying them to choose how they want to manage their account going forward. This event sends a worklist item to the terminating employee if that employee has profit-sharing rights notifying them to choose how they want to manage their account going forward.
Notification Method	Email, Worklist

Workflow Objects

Event	JOB_DATA
Workflow Action	Automatic

Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Roleuser by EmplID Benefits Administrator Payroll Administrator Facilities Administrator
Email Template	MIS Administrator Supervisor Training Administrator Profit Sharing to be reviewed Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Administer Workforce
Business Activity	Terminate Workforce
Business Event	Notification Crse Enrollment Cancellation Profit Sharing Benefit Cancellation Payroll Termination Company Property Retrieval

(USF) Terminate Workforce

This section discusses the (USF) Terminate Workforce workflow

Description

Event Description	Upon termination of an employee, various notifications are sent to roles within the organization to take action.

Action Description	This event sends an email to the MIS Administrator notifying them that the employee has been terminated so appropriate action can be taken to disable system accounts. This event sends an email to the employee's manager notifying them that the employee has been terminated. This event sends an email to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends a worklist item to the Training Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel any outstanding course enrollments. This event sends an email to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends a worklist item to the Benefits Administrator notifying them that the employee has been terminated so appropriate action can be taken to cancel benefits for the employee. This event sends an email to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends a worklist item to the Payroll Administrator notifying them that the employee has been terminated so appropriate action can be taken to process final pay for the employee. This event sends an email to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving. This event sends a worklist item to the Facilities Administrator notifying them that the employee has been terminated so appropriate action can be taken to collect any outstanding company property from the employee prior to leaving.
Notification Method	Email, Worklist

Workflow Objects

Event	EE_HR_PROC
Workflow Action	Automatic
Role	MIS Administrator Supervisor-Part Posn Mgt Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator

Email Template	MIS Administrator Supervisor Training Administrator Benefits Administrator Payroll Administrator Facilities Administrator
Business Process	Terminate Employee
Business Activity	Terminate Workforce (USF)
Business Event	Notification Crse Enrollment Cancellation Benefit Cancellation Payroll Termination Company Property Retrieval

Delivered Workflows for Manage Base Compensation and Budgeting

This section discusses PeopleSoft Human Resources Manage Base Compensation and Budgeting workflows. The workflows are listed alphabetically by workflow name.

Approve or Deny Ad Hoc Salary Changes

This section discusses the Approve or Deny Ad Hoc Salary Changes workflow.

Description

This section discusses the Approve or Deny Ad Hoc Salary Changes workflow.

Event Description	An administrator or manager approves or rejects an ad hoc salary change request.
Action Description	Employees receive an email when the administrator approves or rejects the ad hoc salary change request.
Notification Method	Email, Worklist

Workflow Objects

Event	Process Salary Change

Workflow Action	Process Salary Change
Role	Personnel Administrator

Approve or Deny Budgeted Salary Changes

This section discusses the Approve or Deny Budgeted Salary Changes workflow.

Description

Event Description	An administrator or manager approves or rejects a budgeted salary request for a group of employees.
Action Description	Manager receives an email when the administrator or approving manager approves or rejects the budgeted salary request for a group of employees.
Notification Method	Email, Worklist

Workflow Objects

Event	Process Salary Change
Workflow Action	Process Salary Change
Role	Personnel Administrator

Process Salary Change

This section discusses the Process Salary Change workflow.

Description

Event Description	Manager requests system to calculate group salary budget.
Action Description	System calculates group salary budget.
Notification Method	Email, Worklist

Workflow Objects

Event	Process Salary Change

Workflow Action	Process Salary Change
Role	Personnel Administrator

Request Salary Change

This section discusses the Calculate Budgets workflow.

Description

Event Description	Manager requests system to calculate group salary budget.
Action Description	System calculates changes to group salary budget.
Notification Method	Email, Worklist

Workflow Objects

Event	Request Salary Change
Workflow Action	Request Salary Change
Role	Roleuser by Roleuser Query

Delivered Workflow for Manage Employee Reviews

This section discusses Employee Review workflows.

Manage Employee Reviews Notification Events

This section discusses the Employee Review notification workflow.

Description

Event Description	When employees and managers use Employee Reviews to create evaluations, this generic notification event is used to support email notifications that are sent to the appropriate participant.
Action Description	Email notifications are sent to inform the appropriate persons of: the availability of documents for viewing and updating; a change in the status of documents; and the transfer of documents to a new manager.

Notification Method	email

Delivered Workflows for Manage French Profit Sharing

This section discusses PeopleSoft Human Resources Manage French Profit Sharing workflows. The workflows are listed alphabetically by workflow name.

Approve Fund Release Request

This section discusses the Approve Fund Release Request workflow.

Description

Event Description	Workflow is generated when an administrator approves an employee's request for release of profit-sharing funds.
Action Description	The email notifies employees that their fund release request is approved.
Notification Method	Email

Workflow Objects

Event	WP_PROFIT_SHARING
Workflow Action	Manual
Role	Employee
Email Template	APP_REL_REQ_MAIL
Business Process	MAN_REL_REQ
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	APP_REL_REQ_EVENT

Error in Fund

This section discusses the Error in Fund workflow.

Description

Event Description	When the Process Interest and Payment process encounters an error an employee's fund, an email is sent to the administrator to notify them to review.
Action Description	The email notifies the administrator of an error in an employee's fund.
Notification Method	Email

Workflow Objects

Event	WP_FUND_STATUS
Workflow Action	Automatic
Role	HR Administrator FRA
Email Template	FUN_STA_ERR_MAIL
Business Process	MAN_FUN_STA_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	FUN_STA_ERR_EVENT

Modify Financial Organization

This section discusses the Modify Financial Organization workflow.

Description

Event Description	When employees change the financial organization on the Investment page of the Agreement Personalization component (WP_AGREEMENT_CUST), workflow is generated to notify the administrator of the change.
Action Description	Worklist and an email notify the administrator of the change in financial organization.
Notification Method	Email, worklist.

Workflow Objects

Event	WP_AGREEMENT_CUST
Workflow Action	Manual

Role	HR Administrator FRA
Email Template	MOD_FIN_ORG_MAIL
Business Process	MOD_FIN_ORG_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	MOD_FIN_ORG_EVENT

Modify Fund Status

This section discusses the Modify Fund Status workflow.

Description

Event Description	When the fund status for a fund is modified by the Process Interest and Payment process, an email is sent to inform the member of the change.
Action Description	The email notifies employees of the change of fund status.
Notification Method	Email

Workflow Objects

Event	WP_FUND_STATUS
Workflow Action	Automatic
Role	Employee
Email Template	FUN_STA_MOD_MAIL
Business Process	MAN_FUN_STA_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	FUN_STA_MOD_EVENT

Reject Fund Release Request

This section discusses the Reject Fund Release Request workflow.

Description

Event Description	Workflow is generated when an administrator rejects an employee's request for release of profit-sharing funds.
Action Description	The email notifies employees that their fund release request was rejected.
Notification Method	Email

Workflow Objects

Event	WP_PROFIT_SHARING
Workflow Action	Manual
Role	Employee
Email Template	REJ_REL_REQ_MAIL
Business Process	MAN_REL_REQ
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	REJ_REL_REQ_EVENT

Request Fund Release

This section discusses the Request Fund Release workflow.

Description

Event Description	Employee submits a request for release of profit-sharing funds from the Personal Entitlements component (WP_FUND_RELEASE). Workflow is generated to notify the administrator of the request.
Action Description	From the email or worklist, the system transfers the administrator to the Employee Release Detail page where he or she can view and approve or reject the fund release request.
Notification Method	Email, worklist.

Workflow Objects

Event	WP_FUND_RELEASE

Workflow Action	Manual
Role	HR Administrator FRA
Email Template	REQ_FUN_REL_MAIL
Business Process	REQ_FUN_REL_STEP
Business Activity	WP_PROFIT_SHARING_FRA
Business Event	REQ_FUN_REL_EVENT

Delivered Workflows for Manage French Public Sector

This section discusses PeopleSoft Human Resources Manage French Public Sector workflows. The workflows are grouped by activity.

CAE Request (Hiring)

This section discusses the CAE Request workflow in the Hiring Activity.

Description

Event Description	When a hiring is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	HIRE
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_HIRE

Business Event	FP_CA_REQUIRE_E

Stamp Request (Hiring)

This section discusses the Stamp Request workflow in the CAE Allocation (hire process) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_CREATION
Business Activity	FP_CA_CREATE1
Business Event	FP_CA_STMPREQ_E

CAE Denied (Hiring)

This section discusses the CAE Denied workflow in the CAE Allocation (hire process) Activity.

Description

Event Description	If the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the hiring.

Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_CA_CREATE1
Business Event	FP_CA_DENY_E

Stamp Denied (Hiring)

This section discusses the Stamp Denied workflow in the Stamp Assignment (hiring) Activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_CREATION
Business Activity	FP_VISA

Business Event	FP_CA_STMPDENY_E

Stamp Granted (Hiring)

This section discusses the Stamp Granted workflow in the Stamp Assignment (hiring) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the hiring.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STMPGRANTED_E

Stamp Postponed (Hiring)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (hiring) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email to the manager.
Action Description	The email informs the manager that the hiring is postponed
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_CREATION
Business Activity	FP_VISA
Business Event	FP_CA_STBY_E

Delete Confirmed (Hiring)

This section discusses the Delete Confirmed workflow in the CAE Delete (hiring denied) activity.

Description

Event Description	When the headcount manager deletes the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the hiring.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_CREATION
Business Activity	FP_HIRE_REFUSE
Business Event	FP_CA_DELETE_E

Grade Change

This section discusses the Grade Change workflow in the Grade Change activity.

Description

Event Description	When a grade change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEECAREER_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CHGT_RANK
Business Event	FP_CA_RKCHNG_C

Stamp Request (Grade and CAE Change)

This section discusses the Stamp Request workflow in the Grade and CAE Change activity.

Description

Event Description	When the headcount manager allocates the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CA_CREATE
Business Event	FP_CA_STMPREQ_C

CAE Denied (Grade and CAE Change)

This section discusses the CAE Denied workflow in the Grade and CAE Change activity.

Description

Event Description	If the headcount manager denies the allocation of the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the request for grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_CA_CREATE
Business Event	FP_CA_DENY_C

Stamp Denied (New Grade)

This section discusses the Stamp Denied workflow in the Stamp Assignment (new grade) activity.

Description

Event Description	If the headcount manager denies the allocation of the CAE for the grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the request for grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STMPDENY_C

Stamp Granted (New Grade)

This section discusses the Stamp Granted workflow in the Stamp Assignment (new grade) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STMPGRANTED_C

Stamp Postponed (New Grade)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (new grade) activity.

Description

Event Description	If the finance controller holds or postpones the CAE for the grade change, this workflow generates an email.
Action Description	An email informs the manager that the grade change process is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_PROMOTION
Business Activity	FP_VISA_CH
Business Event	FP_CA_STBY_C

Delete Confirmed (New Grade)

This section discusses the Delete Confirmed workflow in the CAE Delete (new grade) activity.

Description

Event Description	When the headcount manager deletes the CAE request for grade change, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROMOTION
Business Activity	FP_RK_CHNG_DENIED
Business Event	FP_CA_DELETE_C

Work Time Percentage Change

This section discusses the Work Time Percentage Change workflow in the Work Time Percentage Change activity.

Description

Event Description	When a Work Time Percentage (WTP) Change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE for WTP.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CHGT_TPS_WORK
Business Event	FP_CA_WKRT_F

Stamp Request (WTP and CAE Change)

This section discusses the Stamp Request workflow in the Work Time Percentage and CAE Change activity.

Description

Event Description	When the headcount manager allocates the CAE for WTP, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CA_CREATE3
Business Event	FP_CA_STMPREQ_F

CAE Denied (WTP and CAE Change)

This section discusses the CAE Denied workflow in the Work Time Percentage and CAE Change activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers the control to the manager who deletes the Work Time Percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_CA_CREATE3
Business Event	FP_CA_DENY_F

Stamp Denied (New WTP)

This section discusses the Stamp Denied workflow in the Stamp Assignment (New WTP) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE for work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STMPDENY_F

Stamp Granted (New WTP)

This section discusses the Stamp Granted workflow in the Stamp Assignment (New WTP) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STMPGRANTED_F

Stamp Postponed (New WTP)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (New WTP) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates a worklist entry.
Action Description	The email informs the manager that the approval for the Work time Percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_WRKRT
Business Activity	FP_VISA_CH2
Business Event	FP_CA_STBY_F

Delete Confirmed (New WTP)

This section discusses the Delete Confirmed workflow in the CAE Delete (New WTP) activity.

Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_WRKRT
Business Activity	FP_PT_CHNG_DENIED
Business Event	FP_CA_DELETE_F

Double Change

This section discusses the Double Change workflow in the CAE and Grade and Work Time Percentage Change activity.

Description

Event Description	When a grade and work time percentage change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers the control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CHGT_RK_TPS
Business Event	FP_CA_WKRT_K

Stamp Request (Grade, WTP, and CAE Change)

This section discusses the Stamp Request workflow in the Grade and Work Time Percentage and CAE Change activity.

Description

Event Description	Once the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the Finance Controller who stamps the CAE allocation for the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CA_CREATE4
Business Event	FP_CA_STMPREQ_K

CAE Denied (Grade, WTP and CAE Change)

This section discusses the CAE Denied workflow in the Grade and Work Time Percentage and CAE Change activity.

Description

Event Description	Once the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the Grade and work time percentage change.

Notification Method	Worklist

Workflow Objects

Event	FPA_CA_CHNG_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_CA_CREATE4
Business Event	FP_CA_DENY_K

Stamp Denied (New Grade and WTP)

This section discusses the Stamp Denied workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager so that he deletes the CAE for grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_PROM_WRKRT

Business Activity	FP_VISA_CH3
Business Event	FP_CA_STMPDENY_K

Stamp Granted (New Grade and WTP)

This section discusses the Stamp Granted workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who validates the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STMPGRANTED_K

Stamp Postponed (New Grade and WTP)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (New Grade and Work Time Percentage) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.

Action Description	An email informs the manager that the grade / work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CACH_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_VISA_CH3
Business Event	FP_CA_STBY_K

Delete Confirmed (New Grade and WTP)

This section discusses the Delete Confirmed workflow in the CAE Delete (New Grade and Work Time Percentage) activity.

Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL

Business Process	FP_CA_PROM_WRKRT
Business Activity	FP_PT_CHNG_DENIED2
Business Event	FP_CA_DELETE_K

CAE De-allocation Request

This section discusses the CAE De-allocation Request workflow in the Termination activity.

Description

Event Description	When a termination is in progress, once the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who de-allocates the CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEELEGAL_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_CA_DISCHG
Business Event	FP_CA_DISCH_D

Stamp Request (CAE De-allocation)

This section discusses the Stamp Request workflow in the CAE De-allocation activity.

Description

Event Description	When the headcount manager de-allocates the CAE, this workflow generates a worklist entry.

Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE de-allocation.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DISCH_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_LIB_CA
Business Event	FP_CA_STMPREQ_D

De-allocation Denied (CAE De-allocation)

This section discusses the De-allocation Denied workflow in the CAE De-allocation activity.

Description

Event Description	Once the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who deletes the termination.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DISCH_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL

Business Process	FP_CA_DISCHG
Business Activity	FP_LIB_CA
Business Event	FP_CA_DENY_D

De-allocation Denied (Stamp)

This section discusses the De-allocation Denied workflow in the CAE De-allocation Stamp activity.

Description

Event Description	If the finance controller denies stamping of the CAE for de-allocation, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who restores the CAE.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STMPDENY_D

Stamp Granted (CAE De-allocation)

This section discusses the Stamp Granted workflow in the CAE De-allocation Stamp activity.

Description

Event Description	If the finance controller approves the de-allocation of the CAE, this workflow generates a worklist entry.

Action Description	When this worklist is selected, the system transfers control to the manager who validates the termination.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB
Business Event	FP_CA_STMPGRANTED_D

De-allocation Postponed

This section discusses the De-allocation Postponed workflow in the CAE De-allocation Stamp activity.

Description

Event Description	If the finance controller holds or postpones the CAE for de-allocation, this workflow generates an email.
Action Description	An email informs the manager that the termination is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_DSCH
Workflow Action	Manual
Email Template	FP_CA_NOTIF
Business Process	FP_CA_DISCHG
Business Activity	FP_VISA_LIB

Business Event	FP_CA_STBY_D

CAE Request

This section discusses the CAE Request workflow in the Return activity.

Description

Event Description	When a return is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE for the return
Notification Method	Worklist

Workflow Objects

Event	FPAEELEGAL_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_RETURN
Business Event	FP_CA_REINST_R

Stamp Request (Return)

This section discusses the Stamp Request workflow in the CAE allocation (simple return) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for return.

Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_CA_CREATE2
Business Event	FP_CA_STMPREQ_R

CAE Denied (Return)

This section discusses the CAE Denied workflow in the CAE allocation (simple return) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_CA_CREATE2

Business Event	FP_CA_DENY_R

Stamp Denied (Return)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who deletes the CAE allocation for the return.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STMPDENY_R

Stamp Granted (Return)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return.

Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STMPGRANTED_R

Stamp Postponed (Return)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return is postponed
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_VISA_CR2
Business Event	FP_CA_STBY_R

Delete Confirmed (Return)

This section discusses the Delete Confirmed workflow in the CAE Delete (return) activity.

Description

Event Description	Once the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINSTATEMENT
Business Activity	FP_HIRE_REFUSE2
Business Event	FP_CA_DELETE_R

Double Change (Return)

This section discusses the Double Change workflow in the Return and Grade Change activity.

Description

Event Description	When a return and grade change activity is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEECAREER_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_RKRETURN_H
Business Event	FP_CA_RKCHNG_H

Stamp Request (Return and Grade Change)

This section discusses the Stamp Request workflow in the CAE allocation (return and grade change) activity.

Description

Event Description	Once the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_CREATE_H
Business Event	FP_CA_STMPREQ_H

CAE Denied (Return and Grade Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and grade change) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_CREATE_H
Business Event	FP_CA_DENY_H

Stamp Denied (Return and Grade Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and grade change) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STMPDENY_H

Stamp Granted (Return and Grade Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and grade change) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE for the return and grade change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STMPGRANTED_H

Stamp Postponed (Return and Grade Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and grade change) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and grade change process is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_STMPCREATE_H
Business Event	FP_CA_STBY_H

Delete Confirmed (Return and Grade Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return and grade change) activity.

Description

Event Description	When the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and grade change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_PROM
Business Activity	FP_CA_REFUSE_H
Business Event	FP_CA_DELETE_H

Double Change (Return and WTP Change)

This section discusses the Double Change workflow in the Return and Work Time Percentage Change activity.

Description

Event Description	When a return and work time percentage change process is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAEEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_WKRTRETURN_B
Business Event	FP_CA_WKRTCHNG_B

Stamp Request (Return and WTP Change)

This section discusses the Stamp Request workflow in the CAE allocation (return and work time percentage change) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_CREATE_B
Business Event	FP_CA_STMPREQ_B

CAE Denied (Return and WTP Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and work time percentage change) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_CREATE_B
Business Event	FP_CA_DENY_B

Stamp Denied (Return and WTP Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and work time percentage) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the CAE corresponding to the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STMPDENY_B

Stamp Granted (Return and WTP Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and work time percentage) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE for the Return and work time percentage change, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STMPGRANTED_B

Stamp Postponed (Return and WTP Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and work time percentage change) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_STMPCREATE_B
Business Event	FP_CA_STBY_B

Delete Confirmed (Return and WTP Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return and work time percentage change denied) activity.

Description

Event Description	When the headcount manager has deleted the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_WRKRT
Business Activity	FP_CA_REFUSE_B
Business Event	FP_CA_DELETE_B

Triple Change (Return, Grade, and WTP Change)

This section discusses the Triple Change workflow in the Return, Grade, and Work Time Percentage Change activity.

Description

Event Description	When a return and grade and work time percentage change is in progress and the employee record is updated, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the headcount manager who allocates a new CAE.
Notification Method	Worklist

Workflow Objects

Event	FPAAEWORKRT_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_RKWKRTRETURN_Z
Business Event	FP_CA_RKWKRTCHNG_Z

Stamp Request (Return, Grade, and WTP Change)

This section discusses the Stamp Request workflow in the CAE allocation (return, grade, and work time percentage) activity.

Description

Event Description	When the headcount manager allocates the CAE, this workflow generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the finance controller who stamps the CAE allocation for the Return and Grade and Work Time Percentage Change.

Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_FULLL
Business Activity	FP_CA_CREATE_Z
Business Event	FP_CA_STMPREQ_Z

CAE Denied (Return, Grade, and WTP Change)

This section discusses the CAE Denied workflow in the CAE allocation (return and grade and work time percentage) activity.

Description

Event Description	When the headcount manager denies the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the Return and Grade and Work Time Percentage Change.
Notification Method	Worklist

Workflow Objects

Event	FP_CA_CR_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULLL

Business Activity	FP_CA_CREATE_Z
Business Event	FP_CA_DENY_Z

Stamp Denied (Return, Grade, and WTP Change)

This section discusses the Stamp Denied workflow in the Stamp Assignment (return and grade and work time percentage) activity.

Description

Event Description	If the finance controller denies stamping of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the headcount manager who cancels the CAE corresponding to the return and grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA2_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STMPDENY_Z

Stamp Granted (Return, Grade, and WTP Change)

This section discusses the Stamp Granted workflow in the Stamp Assignment (return and grade and work time percentage change) activity.

Description

Event Description	If the finance controller approves the allocation of the CAE, this workflow generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who finalizes the return and grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STMPGRANTED_Z

Stamp Postponed (Return, Grade, and WTP Change)

This section discusses the Stamp Postponed workflow in the Stamp Assignment (return and grade and work time percentage change) activity.

Description

Event Description	If the finance controller holds or postpones the CAE, this workflow generates an email.
Action Description	An email informs the manager that the return and grade and work time percentage change is postponed.
Notification Method	Email

Workflow Objects

Event	FPA_CA_STMP_GRP
Workflow Action	Manual

Role	FP_GEST_EFFECTIFS
Email Template	FP_CA_STBY_NOTIF
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_STMPCREATE_Z
Business Event	FP_CA_STBY_Z

Delete Confirmed (Return, Grade, and WTP Change)

This section discusses the Delete Confirmed workflow in the CAE Delete (return with grade and work time percentage change denied) activity.

Description

Event Description	When the headcount manager deletes the CAE, the system generates a worklist entry.
Action Description	When this worklist is selected, the system transfers control to the manager who cancels the return with grade and work time percentage change.
Notification Method	Worklist

Workflow Objects

Event	FPA_CA_DENI_GRP
Workflow Action	Manual
Role	Worklist administrator
Email Template	WF_FP_CA1_WL
Business Process	FP_CA_REINST_FULL
Business Activity	FP_CA_REFUSE_Z
Business Event	FP_CA_DELETE_Z

Accept Tenure

This section discusses the Accept Tenure workflow in the Tenure Probation Period Validation activity.

Description

Event Description	When a Tenure Probation Period is in progress and the manager approves the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who grants tenure.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_ACCEPT_TENURE

Renew Tenure Probation Period

This section discusses the Renew Tenure Probation Period workflow in the Tenure Probation Period Validation activity.

Description

Event Description	When a Tenure Probation Period is in progress and the manager renews the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who renews the probation period.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL

Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_RENEW_TEN_PPD

Refuse Tenure

This section discusses the Refuse Tenure workflow in the Tenure Probation Period Validation activity.

Description

Event Description	When a tenure probation period is in progress and the manager refuses the tenure, the system generates a worklist entry.
Action Description	When the worklist entry is selected, the system transfers control to the HR manager who issues the termination order.
Notification Method	Worklist

Workflow Objects

Event	FPATEN_VALID_PNL
Workflow Action	Manual
Role	Worklist administrator
Email Template	HR_WL_FP
Business Process	FP_TENURE
Business Activity	FP_VALIDATE_TENPPD
Business Event	FP_REFUSE_TENURE

Delivered Workflows for Manage Professional Compliance

This section discusses the Manage Professional Compliance workflows. The workflows are listed alphabetically by workflow name.

Professional Compliance Hire

This section discusses the Professional Compliance Hire workflow in the Professional Compliance Hire activity.

Description

Event Description	A person is hired and is subsequently added to the Professional Compliance business process. Note. This occurs only when a default Professional Compliance Type is associated with the job code of the person being hired.
Action Description	The PCMP_BUS_PROC business process: Adds the hire notification to the new hire's general supervisor's worklist. Sends an email notification to the new hire's general supervisor.
Notification Method	Email and worklist.

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Hire

Professional Compliance Add

This section discusses the Manage Professional Compliance add workflow.

Description

Event Description	A person is manually added to the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the general supervisor of the person informing them that the person has been added within the Professional Compliance business process and that further action is required.

Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Add

Professional Compliance Classification Change

This section discusses the Manage Professional Compliance classification change workflow.

Description

Event Description	There is a change in classification level for a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends an email notification to the compliance supervisor of the person informing them that there has been a change of classification within the Professional Compliance business process and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Classification Change

Professional Compliance Job Change

This section discusses the Manage Professional Compliance job change workflow.

Description

Event Description	There is a job change for a person that is part of the Professional Compliance business process.

Action Description	The PCMP_BUS_PROC business process sends an email notification to the compliance supervisor of the person informing them that there has been a change of job and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Job Change

Professional Compliance Recertification

This section discusses the Manage Professional Compliance recertification workflow.

Description

Event Description	The recertification Application Engine program runs for persons in the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process sends a notification to the compliance supervisor informing them of lapsed or upcoming license and certification expiration dates. If the certification information is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Re-Certification

Professional Compliance Termination

This section discusses the Manage Professional Compliance termination workflow.

Description

Event Description	There is a termination of a person that is part of the Professional Compliance business process.
Action Description	The PCMP_BUS_PROC business process: Add the hire notification to the worklist. Sends an email notification to the compliance supervisor of the person informing them that the employee has been terminated and that further action is required. If the change in classification is for a supervisor, their compliance manager should be notified.
Notification Method	Email

Workflow Objects

Business Process	PCMP_BUS_PROC
Activity	Professional Compliance Job Change

Delivered Workflows for Manage Variable Compensation

This section discusses PeopleSoft Human Resources Manage Variable Compensation workflows. The workflows are listed alphabetically by workflow name.

Allocate Awards by Plan (Approval)

This section discusses the Allocate Awards by Plan workflow.

Description

Event Description	User changes the awards calculated or the award status of individual variable compensation plans.
Action Description	Manager approves changes that have been made to the calculated amounts or status of individual variable compensation plans.
Notification Method	Email

Workflow Objects

Role	Roleuser by Emplid Qry

Allocate Awards by Plan (Denial)

This section discusses the Allocate Awards by Plan workflow.

Description

Event Description	User changes the awards calculated or the award status of individual variable compensation plans.
Action Description	Manager denies changes that have been made to the calculated amounts or status of individual variable compensation plans.
Notification Method	Email, Worklist

Workflow Objects

Event	Email for Denial
Workflow Action	Email for Denial
Role	Roleuser by Emplid Qry

Allocate Awards by Group (Approval)

This section discusses the Allocate Awards by Group workflow.

Description

Event Description	User changes the awards calculated for group members or the award status of individual variable compensation plans.
Action Description	Manager approves changes that have been made to the calculated amounts for group members or the award status of individual variable compensation plans.
Notification Method	Email

Workflow Objects

Role	Roleuser by Emplid Qry

Allocate Awards by Group (Denial)

This section discusses the Allocate Awards by Group workflow.

Description

Event Description	User changes the awards calculated for group members or the award status of individual variable compensation plans.
Action Description	Manager denies changes that have been made to the calculated amounts for group members or the status of individual variable compensation plans.
Notification Method	Email, Worklist

Workflow Objects

Event	Email for Denial
Workflow Action	Email for Denial
Role	Roleuser by Emplid Qry

Allocate Group Funding

This section discusses the Allocate Group Funding workflow.

Description

Event Description	Manager or approver makes changes to the variable compensation award for a group.
Action Description	Approving manager approves or denies changes to the variable compensation award for a group.
Notification Method	Email, Worklist

Workflow Objects

Event	Funds Change Event
Workflow Action	Funds Change Event
Role	Roleuser by Emplid Qry

VC Tree Changes

This section discusses the VC Tree Changes workflow.

Description

Event Description	Manager or approver makes changes to a variable compensation tree.
Action Description	Approving manager approves or denies changes to the variable compensation tree.
Notification Method	Email, Worklist

Workflow Objects

Event	VC Tree Change Event
Workflow Action	VC Tree Change Event
Role	VC Administrator, HR Administrator

VC Tree Delete

This section discusses the VC Tree Delete workflow.

Description

Event Description	Manager or approver makes deletions to a variable compensation tree.
Action Description	Approving manager approves or denies the deletions to the variable compensation tree.
Notification Method	Email, Worklist

Workflow Objects

Event	VC Tree Delete Event
Workflow Action	VC Tree Delete
Role	VC Administrator

VC Tree Rename

This section discusses the VC Tree Rename workflow.

Description

Event Description	Manager or approver renames a variable compensation tree.
Action Description	Approving manager approves or denies the renaming of the variable compensation tree.
Notification Method	Email

Workflow Objects

Event	VC Tree Rename Event
Workflow Action	VC Tree Rename Event
Role	VC Administrator

Delivered Workflows for Plan Careers

This section discusses the Plan Careers workflow.

(USF) Career Plan

This section discusses the career plan workflow.

Description

Event Description	When a career plan is created or updated for an employee, a worklist entry is sent to the Supervisor.
Action Description	When a manager approves a career plan for an employee, a worklist entry is sent to the HR Developmental Staff role. When a manager disapproves a career plan for an employee, a worklist entry is sent back to the Supervisor. When HR disapproves a career plan for an employee, a worklist entry is sent back to the Supervisor.
Notification Method	Worklist

Workflow Objects

Event	CAREER_PLAN
Workflow Action	Automatic
Role	Supervisor-Part Posn Mgt
Email Template	Manager Worklist
Business Process	Career Plan
Business Activity	Develop Career Plan (USF) Review Career Plan (USF)
Business Event	Submit Plan to Manager; Manager Approves Plan; Manager Disapproves Plan; HR Disapproves Plan.

Appendix D

PeopleSoft Application Fundamentals for HRMS Reports

PeopleSoft Enterprise Human Resources supplies a group of standard reports to help you review the entries in the various tables you use to set up controls for your Human Resources system, including departments, companies, locations, and job codes. For international purposes, you can review the currency codes and exchange rates to see if you need to update the data.

To offer our customers more robust and complete reporting solutions, Oracle's PeopleSoft Enterprise development teams are converting some of the existing Crystal reports into XML Publisher (XMLP) format.

Oracle provides a standalone Java-based reporting technology named Oracle Business Intelligence Publisher (BI Publisher) that streamlines report and form generation. XMLP uses select features from BI Publisher that have been integrated into PeopleTools. XML Publisher for PeopleSoft Enterprise provides native XMLP technology for PeopleSoft Query and Connected Query, as well as any PeopleSoft application.

XMLP separates the data extraction process from the report layout. XMLP provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, you can generate reports in many formats (PDF, RTF, Excel, HTML, and so on) and in many languages.

This appendix provides summary tables of basic HRMS reports and Human Resources reports.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools PeopleBook: Process Scheduler

Basic PeopleSoft HRMS Reports: A to Z

These tables list basic PeopleSoft HRMS reports as well as reports for specific PeopleSoft Human Resources business processes sorted by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Basic HRMS Reports

Report ID and Report Name	Description	Navigation	Run Control Page
AWEAUDIT Approvals Audit Report	Report includes data regarding approval transaction requests associated with the Approval Framework.	Workforce Administration, Self-Service Transactions, Approvals and Delegation, Approvals Audit Report, Approvals Audit Report	HCSCAWE_RUN_CNTL
FGHR005 Salary Grade Table USF report	Print the contents of the Federal Salary Grade tables in various formats.	Setup HRMS, Product related, Compensation, Salary Grade Table Rpt USF, Pay Table	RUN_FGHR005
FGPER802 Geographic Location report	Produces a detailing of the Geographic Location Table. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Geographic Location	PRCSRUNCNTL
FGPER803 Agency report	Prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date. (XMLP, Crystal)	Set Up HRMS, Foundation Tables, Organization, Agency Report Table USF	PRCSRUNCNTL
FGPER804 Sub-Agency Table report	Prints all sub-agencies in the Sub-Agency Table and their associated agencies. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Sub-Agency Table	PRCSRUNCNTL
FGPER805 Personnel Office ID Table report	Prints information about all Personnel Offices in your agency. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Personnel Office ID Table	PRCSRUNCNTL
FGPER807 Locality Pay Area Table report	Prints information for every Locality Pay Area. (XMLP, Crystal)	Set Up HRMS, Product Related, Compensation, Locality Pay Area Rpt USF	PRCSRUNCNTL
FGPER808 LEO Pay Area Table report	Lists each LEO Special Pay Area and associated percentage. (XMLP, Crystal)	Set Up HRMS, Product Related, Compensation, LEO Pay Area Rpt USF	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FGPER811 Handicap Table report	Prints all disabilities and their associated codes. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Handicap Table	PRCSRUNCNTL
FGPER812 Legal Authority Table report	Prints the information about the legal authorities you set up in the Legal Authority table. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Legal Authority	PRCSRUNCNTL
FGPER813 Nature of Action Table report	Generates a detailing of the Nature of Action Table. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Nature of Action Table	PRCSRUNCNTL
FGPER814 NOA Authority 1 report	Generates a detailing of the Nature of Action/Authority 1 Table. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, NOA / Authority 1	PRCSRUNCNTL
FGPER816 Priority Placement Table report	Generates a detailing of the Priority Placement Table. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Priority Placement Table	PRCSRUNCNTL
FGPER817 Work Location Table report	Prints a detailing of the Work Location Table. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Work Location Table	PRCSRUNCNTL
FGPER823 USF Job Code Table report	Prints a list of all job codes and the date on which they become effective. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Job Code Table	PRCSRUNCNTL
GBP001 Group Member Overlapping	Shows when members belong to more than one group.	Set Up HRMS, Common Definitions, Group Build, Group Overlapping	RUNCTL_GBP001
GBP002 Group Membership report	Lists all the members in a particular group.	Set Up HRMS, Common Definitions, Group Build, Group Membership	RUNCTL_GBP002

Report ID and Report Name	Description	Navigation	Run Control Page
PAY701 Bank/Branch	Lists banks/branches entered in the Bank/Branch table.	Set Up HRMS, Common Definitions, Banking, Bank/Branch Report	PRCSRUNCNTL
PAY710 ChartField Transaction Report	Lists ChartField codes used in transactions.	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Transaction Report	PRCSRUNCNTL
PAY711 Pay Group report	Prints each pay group and its effective date along with the processing characteristics that apply to that group.	Set Up HRMS, Product Related, Payroll Interface, Payroll Reports, Pay Group Table	PRCSRUNCNTL
PAY717 Earnings Program Table	Prints a detailing of your pay plan definitions.	Set Up HRMS, Product Related, Payroll Interface, Payroll Reports, Earnings Program	PRCSRUNCNTL
PAY760 Combination Code Report	Lists account codes set up in the Combination Code Table.	Set Up HRMS, Common Definitions, ChartField Configuration, Combination Code Report	PRCSRUNCNTL
PER506 Security Tree Audit	Lists discrepancies between entries in the Departments component and departments on department security trees.	Set Up HRMS, Security, Core Row Level Security, Security Tree Audit Report	PRCSRUNCNTL
PER701 Department Table report	Lists all departments by Department ID. (XMLP, Crystal)	Set Up HRMS, Foundation Tables, Organization, Department Table Report	PRCSRUNCNTL
PER702 Installation Table report	Lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number. (XMLP, Crystal)	Set Up HRMS, Install, Installation Table Report	PRCSRUNCNTL
PER705 Location Table report	Lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future). (XMLP, Crystal)	Set Up HRMS, Foundation Tables, Organization, Location Table Report	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER707 Company Table report	Prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table. (XMLP, Crystal)	Set Up HRMS, Foundation Tables, Organization, Company Table Report	PRCSRUNCNTL
PER708 Country Table report	Prints a list all countries – character codes. (XMLP, Crystal)	Set Up HRMS, Install, Country Table Report	PRCSRUNCNTL
PER709A US Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for U.S.-based companies. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Jobcode Rpt USA	PRCSRUNCNTL
PER709B Can Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for Canada-based companies. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Jobcode Table Report CAN	PRCSRUNCNTL
PER709C Job Code Table report	Prints a list of all job codes and the date on which they become effective. (XMLP, Crystal)	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table Report	PRCSRUNCNTL
PER711 Standard Letter Table report	The Standard Letter Table report lists the codes in your Standard Letter Table. (XMLP, Crystal)	Set Up HRMS, Common Definitions, Letters and Documents, Standard Letter Report	PRCSRUNCNTL
PER713 Currency Code Table report	Prints information about each currency. (XMLP, Crystal)	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Code Table	PRCSRUNCNTL
PER714 Currency Rate Table report	Prints information about exchange rates. (XMLP, Crystal)	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Rate Report	PRCSRUNCNTL

Administer Company Cars Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CAR002 Print P11D Section A	Print the results from the CAR001 process in a format similar to the UK government form P11D. Before using this page, you must have run the CAR001 report process.	Benefits, Provide Company Cars, Print P11D Information	RUNCTL_COMPCAR001
CAR003 Car List	Produce a list of cars in the company's fleet and list basic information.	Benefits, Provide Company Cars, Create List of Cars	PRCSRUNCNTL

Administer Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP013 Update Seniority Pay Reporting	Lists workers and all their seniority changes. Run this report after you've run the Update Seniority Pay process (HR_CMP013) and before you run the Upd Seniority Pay – Load Data process (HR_CMP013_CI) to load the changes to Job.	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Pay	RUNCTL_SENPAY2
CMP014S Update Seniority Eligibility Reporting	Lists workers and all their seniority changes. Run this report after you've run the Update Seniority Eligibility process (HR_CMP014) and before you run the Upd Seniority Elig – Load Data process (HR_CMP014_CI) to load the changes to Job.	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Eligibility	RUNCTL_SENPAY
CMP015 Refresh Employee Compensation	Reports on all the changes performed by the General Compensation Update Process. Run this report after you've run the General Compensation Update process (HR_CMP015).	Workforce Administration, Collective Processes, Refresh Compensation	RUNCTL_CMP015

Report ID and Report Name	Description	Navigation	Run Control Page
CMP016 Defaulting Rules Eligibility	Lists the workers eligible for the selected defaulting rules as of selected date.	Set Up HRMS, Foundation Tables, Compensation Rules, Defaulting Rules Eligibility Rpt	RUNCTL_CMP016

Administer Salaries for the Netherlands Reports

Report ID and Report Name	Description	Navigation	Run Control Page
INT003NL Pay Groups	Provides an overview of the pay groups entered in the system.	Set Up HRMS, Product Related, Benefits NLD, Reports, Pay Groups	PRCSRUNCNTL
INT004NL Earnings Table (NLD)	Reviews all the valid earnings codes that you entered into the system, along with the payroll calculation characteristics that you assign to each.	Set Up HRMS, Product Related, Benefits NLD, Reports, Earnings	PRCSRUNCNTL
INT005NL Deductions / Frequency (NLD)	Reviews all the valid deduction codes that are entered into the system. The SQR is sorted by plan type, deduction code, and effective date.	Set Up HRMS, Product Related, Benefits NLD, Reports, Deductions	PRCSRUNCNTL
INT006NL General Deduction/Frequency (NLD)	Shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the worker pay frequency, and any additional flat deduction amounts.	Set Up HRMS, Product Related, Benefits NLD, General Deduction/Frequency	PRCSRUNCNTL

Administer Salary Packaging Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PKG003 Packages Due for Review	Displays all workers with packages ready for review.	Compensation, Salary Packaging AUS, Create Packaging Reports, Packages Due For Review	RUNCTL_PKG003

Report ID and Report Name	Description	Navigation	Run Control Page
PKG004 Package Model	Enables you to report on an applicant or a worker's salary package. The information contained in the report displays the details from the worker / applicant salary package pages. Both annual and package period amounts for components, additional components, salary, tax and TPV and TEC are displayed.	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Models	RUNCTL_PKG004
PKG006 FBT Reconciliation	Assists in the reporting of benefits and liabilities to the Australian Taxation Office at the end of the Fringe Benefits Tax Year— March 31. The Australian Taxation Office has identified different categories of fringe benefits and each category has its own specific rules for calculating the taxable value.	Compensation, Salary Packaging AUS, Create Packaging Reports, FBT Reconciliation	RUNCTL_PKG006
PKG007 Package Details	Reports on the amounts budgeted for each component of a package in each pay period. The report, run on a worker only basis, requires a start and end date of the period of time you want to report on.	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Details	RUNCTL_PKG007

Administer Training Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF182 (USF) SF182	Provides a standardized mechanism for generating SF182 reports to request, authorize, and detail estimates costs and billing as well as certify training programs for workers. (SQR)	Enterprise Learning, Training Reports, SF182	RUNCTL_SF182

Report ID and Report Name	Description	Navigation	Run Control Page
MXSTP001 (Format) (MEX) DC-1 Training Mixed Committee Constitution	Provides details about the formation of a training mixed committee and the establishment associated with the mixed committee.	Enterprise Learning, Training Reports, STPS DC-1 Format MEX	RUNCTL_STP001
MXSTP002 MXSTP002 (Reverse)	See above.	Enterprise Learning, Training Reports, STPS DC-1 Format MEX	RUNCTL_STP001
MXSTP003 (Format) (MEX) DC-2 Training and Development Plans	Provides training and development plan information, including training objective priorities. Also provides the establishment associated with the mixed committee.	Enterprise Learning, Training Reports, STPS DC-2 Format MEX	RUNCTL_STP003
MXSTP004 MXSTP004 (Reverse)	See above.	Enterprise Learning, Training Reports, STPS DC-2 Format MEX	RUNCTL_STP003
MXSTP005 (MEX) DC-2B Training and Development Registration Application	Generates a Training and Development Registration Application report.	Enterprise Learning, Training Reports, STPS DC-2B Format MEX	RUNCTL_STP005
MXSTP006 (MEX) DC-3 Courses/Events Certificates	Creates a Courses/Events Certificate.	Enterprise Learning, Training Reports, STPS DC-3 Format MEX	RUNCTL_STP006
MXSTP007 (MEX) DC-4 Courses/Events Certificates List	Creates a Courses/Events Certificates list.	Enterprise Learning, Training Reports, MEX STPS DC-4 Format	RUNCTL_STP007
MXSTP008 (Format) (MEX) DC-5 Training and Development External Registration Application	Generates a Training and Development External Registration application and an instructor list.	Enterprise Learning, Training Reports, STPS DC-5 Format MEX	RUNCTL_STP008
MXSTP009 MXSTP009 (Reverse)	See above	Enterprise Learning, Training Reports, STPS DC-5 Format MEX	RUNCTL_STP008

Report ID and Report Name	Description	Navigation	Run Control Page
PER107GR (GER) Int. Prof. Education Status (internal professional education status)	Details the current status of workers who are enrolled in an internal education training plan. Includes only workers who selected the Intern check box and didn't select <i>Graduated</i> on the Professional Education page. (Crystal)	Enterprise Learning, Training Reports, Int Prof Education Status DEU	PRCSRUNCNTL
PER703 Course Table	Lists available courses, including course descriptions, type codes, locations, durations, and schools. You can use it to track internal courses and courses offered by outside vendors. (XMLP, Crystal)	Enterprise Learning, Course Reports, Courses	PRCSRUNCNTL
TRN001 Training Letters	Creates training letters. (SQR, Word)	Enterprise Learning, Student Enrollment, Create Training Letters	RUNCTL_TRN001
TRN002 Course Session Roster	Lists the course name, session number, session start date, and all students who are enrolled in a course. (XMLP, Crystal)	Enterprise Learning, Course Reports, Course Session Roster	RUNCTL_TRN002
TRN003 Course Waiting List	Lists all students who are on the course or session wait list for a course. (XMLP, Crystal)	Enterprise Learning, Course Reports, Course Waiting List	RUNCTL_TRN003
TRN004 Training Schedule	Lists all course sessions that are scheduled within a given period. (XMLP, Crystal)	Enterprise Learning, Training Reports, Training Schedules	RUNCTL_TRN004
TRN005 Training Facility Schedule	Lists all course sessions scheduled at a training facility during a given period. All sessions are listed by course start date. (XMLP, Crystal)	Enterprise Learning, Training Reports, Training Facility Schedules	RUNCTL_TRN005
TRN010 Active Scenario Summary	Summarizes approved training demands and budget information for a business unit. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Active Scenario Summary	RUNCTL_TRN010

Report ID and Report Name	Description	Navigation	Run Control Page
TRN011 Global Scenario Summary	Provides a summary of approved training demands and budget information for the department or business unit retrieving the information from the selected global scenario. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Global Scenario Summary	RUNCTL_TRN011
TRN016 Target Course Certifications	Lists the license/certifications that students receive on successful completion of a course. (XMLP, Crystal)	Enterprise Learning, Course Reports, Target Course Certifications	RUNCTL_TRN016
TRN017 Course Rating	Details ratings for sessions of a course. (XMLP, Crystal)	Enterprise Learning, Course Reports, Course Rating	RUNCTL_TRN017
TRN018 Course Attendance Status	Lists the attendance status of the students in a course. (SQR)	Enterprise Learning, Course Reports, Attendance Status	RUNCTL_TRN018
TRN019 Course Rating Templates	Serves as the evaluation template to be completed by students enrolled in a course session. (XMLP, Crystal)	Enterprise Learning, Course Reports, Course Rating Templates	RUNCTL_TRN019
TRN020 Student Training History	Lists the courses and sessions completed by a student. (XMLP, Crystal)	Enterprise Learning, Training Reports, Student Training History	RUNCTL_TRN020
TRN021 Training Program	Lists the training program for a worker. (SQR)	Enterprise Learning, Training Reports, Training Programs, Course Attend. School Program	RUNCTL_TRN021
TRN022 Statistics of EEs Enrolled (statistics of workers enrolled)	Lists the workers who are enrolled in courses and lists course statistics by company, location, and department. (SQR)	Enterprise Learning, Training Reports, Statistics of EEs Enrolled, Course Statistics	RUNCTL_TRN022
TRN023 Course Description	Lists a course description. (XMLP, Crystal)	Enterprise Learning, Course Reports, Course Description	RUNCTL_TRN023
TRN024 Course Category	Lists training catalog course categories. (XMLP, Crystal)	Enterprise Learning, Course Reports, Course Category	RUNCTL_TRN024
TRN025 Course Equipment	Lists equipment needed for a course. (XMLP, Crystal)	Enterprise Learning, Course Reports, Course Equipment	RUNCTL_TRN025

Report ID and Report Name	Description	Navigation	Run Control Page
TRN026 Course Vendors	Lists vendors that are associated with a course on the Course Table. (XMLP, Crystal)	Enterprise Learning, Course Reports, Course Vendors	RUNCTL_TRN026
TRN027 Prerequisite Courses	Lists prerequisite courses for a course. (XMLP, Crystal)	Enterprise Learning, Course Reports, Prerequisite Courses	RUNCTL_TRN027
TRN028 Target Qualifications	Lists competencies that the course aims to develop or improve. (XMLP, Crystal)	Enterprise Learning, Course Reports, Target Qualifications	RUNCTL_TRN028
TRN029 (FRA) Report Training 2483	Compiles results of calculation of the 2483 indicators for declaring vocational training of workers in French organizations. Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page. (XMLP, Crystal)	Enterprise Learning, Training Reports, 2483 Tax Declaration FRA	RUNCTL_TRN029
TRN030 Training Plan Summary	Lists all courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost; the number of people approved; and the total number of hours of training, which is calculated by multiplying the number of approved workers by the course duration. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Training Plan Summary	RUNCTL_TRN030
TRN032 EE Sessn Cost Summary (employee session cost summary)	Lists the costs that are associated with a worker who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, worker expense, and session expense. (SQR)	Enterprise Learning, Training Reports, EE Session Cost Summary	RUNCTL_TRN032

Report ID and Report Name	Description	Navigation	Run Control Page
TRN033 Training Instructor Schedule	Lists the courses that an instructor is scheduled to teach during a given period. (XMLP, Crystal)	Enterprise Learning, Training Reports, Training Instructor Schedules	RUNCTL_TRN033
TRN034 Equipment Checklist	Lists equipment that is required for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period. (SQR) Before running this report, set up the course session in the Course Session Table.	Enterprise Learning, Training Reports, Equipment Checklist	RUNCTL_TRN034
TRN035 (FRA) Training Plan: Distribution	Details how a French organization's training demands are distributed by gender and professional category, such as executive, manager, office worker, qualified worker, and nonqualified worker. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Training Plan Distribution FRA	RUNCTL_TRN035
TRN036 (FRA) Training Plan: Cost Details	Lists a French organization's training costs that are associated with each course. Details these cost types: facility, instructor, vendor, equipment, salary costs, and expenses. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Training Plan Cost Details FRA	RUNCTL_TRN036

Administer Workforce Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CNT001 Contract Information	Lists the contract history for a selected worker or all workers. You can specify a date range for the report for include all contract history.	Workforce Administration, Job Information, Contract Administration, Contract Information Report	RUNCTL_CNT001
ES931 Print Wage and Separation	Prints an ES-931 Request for Wage and Separation Information report.	Workforce Administration, Job Information, Reports, Print Wage/Separation USF	GVT_PRINT_ES931

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR017 Personnel Actions History	Lists all workers affected by each of the job actions you enter. It prints the following information: name, department, effective date, and reason for the action. For each worker the report lists original hire date, total years of service, worker type, regular/temporary, full/part-time, job code and title, salary grade, compensation rate associated with the action, and supervisor's name.	Workforce Administration, Job Information, Reports, Personnel Actions History USF	RUNCTL_FGHR017
FGPER810 Award Type Table	Generates an award type table report. (XMLP, Crystal)	Workforce Administration, Job Information, Reports, Award Action USF	PRCSRUNCNTL
FGSF61 Appointment Affidavits	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.	Workforce Administration, Job Information, Reports, Appointment Affidavits USF	RUNCTL_FGSF61
FGSF75 Request for Preliminary Employment Data	Produces a Request for Preliminary Employment Data form.	Workforce Administration, Job Information, Reports, Request Prelim Empl Data USF	RUN_CNTL_FGSF75
FGSF50 and FGSF52 Request for Personnel Action/Notice of Personnel Action	Prints the official Notification of Personnel Action form used to notify worker and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.	- Workforce Administration, Job Information, Reports, Request Personnel Action USF - Workforce Administration, Job Information, Reports, Notice of Personnel Action USF	RUNCTL_PAR
HR_EDM_NLD First Day Notification NLD	The First Day Notification (<i>Eerste Dag Melding</i>) notifies the tax authority of new employees prior to their start date.	Workforce Administration, Workforce Reports, First Day Notification NLD	RUNCTL_EDM_NLD
MILRNKNOT Generate Rank Change Notices	Generate military rank change notices for one or several service members.	Workforce Administration, Job Information, Reports, Generate Rank Change Notices	MIL_NOTICE_RUN_CTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER001 Department Action Notices	Lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. Run the Refresh Employees Table process before running this report.	Workforce Administration, Workforce Reports, Department Action Notices	PRCSRUNCNTL
PER001CH CHE Company Statistics	This report provides information on worker wages, occupations, and other data necessary for the Company Statistics Report (Betriebszaehlung). The Swiss Federal Department of Statistics requires all Swiss companies to create this report every ten years.	Workforce Monitoring, Company Statistics CHE	RUNCTL_PER001_CHE
PER002 Employee Birthdays	Lists workers, their birthdays, and other identifying information. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Biographical, Birthdays Report	RUNCTL_PER002
PER003 Years of Service	Lists workers who have completed the number of years of service you specify, as of the point in time you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards.	Workforce Administration, Job Information, Reports, Years of Service	RUNCTL_PER003
PER004 Emergency Contacts	Lists all contacts entered on the Emergency Contact table for each worker in the system. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Personal Relationships, Emergency Contacts Report	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER005 Employees on Leave of Absence	Lists all workers on leave and their expected return dates. Use this report to compare the return date you've already entered in PeopleSoft Human Resources with the worker's expected return date or as a reminder for you to enter the return from leave information in the system. Run the Refresh Employees Table process before running this report.	Workforce Administration, Job Information, Reports, Employees on Leave of Absence	PRCSRUNCNTL
PER006 Mailing Labels	Produces a three-across set of mailing labels for all workers in your PeopleSoft Human Resources database. (XMLP, Crystal) Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Biographical, Mailing Labels Report	PRCSRUNCNTL
PER007 Temporary Employees	Provides an alphabetical list of all workers marked as temporary, along with length of service and other details of employment.	Workforce Administration, Job Information, Reports, Temporary Employees	RUNCTL_ASOFDATE
PER010 Employee Turnover Analysis	This time-slice report lists each department ID and provides the worker counts as of the date you specify.	Workforce Administration, Workforce Reports, Employee Turnover Analysis	RUNCTL_FROMTHRU
PER015 Personnel Actions History	Lists all workers affected by each of the job actions you enter.	Workforce Administration, Job Information, Reports, Personnel Actions History	RUNCTL_PER015
PER020 Employee Home Address Listing	Contains a complete listing of all workers with addresses and home phone numbers.	Workforce Administration, Biographical, Home Address Report	PRCSRUNCNTL
PER021 Pending Future Actions	Lists all workers with job action notices scheduled for a future date.	Workforce Administration, Workforce Reports, Pending Future Actions	RUNCTL_ASOFDT_COM P
PER029 Database Audit	Monitors changes, additions, or deletions made to sensitive fields such as salary amounts.	Workforce Administration, Workforce Reports, Database Audit	RUNCTL_FROMTHRU

Report ID and Report Name	Description	Navigation	Run Control Page
PER032 Passport/Visa Expiration	Lists workers and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.	Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	PRCSRUNCNTL
PER033 Citizenship/Country/Visa Audit	Lists discrepancies between worker citizenship country/status and visa data. Displays various discrepancies found for the worker citizenship status in the Personal Data table. Looks for the country specified in the Installation table and uses it as the local country.	Workforce Administration, Personal Information, Citizenship, Citizenship/Country/Visa Audit	PRCSRUNCNTL
PER038NL DIVERSITEIT RAPPORT	Produces the required diversity statistics information related to the number of people in the workforce born in a so-called target country, or of whom one of the parents has been born in one such country.	Workforce Administration, Personal Information, Diversity Compliance NLD, Diversity Reporting	RUNCTL_PER038_NL
PER039GR GER Heavily Disabled	Prints a list of heavily disabled workers and additional information about their disabilities.	Workforce Administration, Personal Information, Disability, Heavily Disabled GER	DSB_RUNCTL_GER
PER054 ESP Official List	Compiles the information you need for Matricula book reporting.	Workforce Administration, Workforce Reports, Official List ESP	RUNCTL_PER054_ESP

Report ID and Report Name	Description	Navigation	Run Control Page
PER058 Primary Job Audit	Lists all people whose job records show potential problems.	Workforce Administration, Workforce Reports, Primary Job Audit	RUNCTL_PER058
PER060 ITA Disability	Runs the Annual, Name List, or Disability Statistics reports.	Workforce Administration, Personal Information, Disability, Disability Report ITA	RUNCTL_PER060
PER063JP Appointment Notification JPN	Runs appointment notifications. Depending on the Action/Reason combination you use in the run control, this report prints individual worker notifications of hire, rehire, retirement, transfer, and promotion.	Workforce Administration, Job Information, Reports, Appointment Notification JPN	RUNCTL_NTF_JPN
PER064JP Appointment List JPN	Runs appointment list reports.	Workforce Administration, Job Information, Reports, Appointment List JPN	RUNCTL_NTF2_JPN
PER065JP Completion of IC Transfer JPN	Lists workers on temporary intercompany transfer.	Workforce Administration, Job Information, Reports, Completion of IC Transfer JPN	RUNCTL_PER065_JPN
PER066BE Termination Notification	Provides details of the contractual and compensation implications for a Belgian employer in case of a termination, based on the notification period according to the Claeys formula.	Workforce Administration, Collective Processes, Administration BEL, Create Notification	RUNCTL_PER066_BEL
PER066IT ITA Hiring Letters	Produces the hiring letter which is printed at hiring time and is signed by worker and employer. It gives details of the terms of the job, including probation period and duration.	Workforce Administration, Job Information, Reports, Hire Letter ITA	RUNCTL_PER066_ITA
PER066JP Employee Assignment List JPN	Lists workers by department, including Additional Appointment workers.	Workforce Administration, Job Information, Reports, Employee Assignment List JPN	RUNCTL_EMPLIST_JPN

Report ID and Report Name	Description	Navigation	Run Control Page
PER067BEL Social Report	Reports a variety of employer/worker information required by the government.	Workforce Administration, Workforce Reports, Social Report BEL	RUNCTL_PER067_BEL
PER100CN CAN Hire List	Produces a hire list that provides information on social insurance numbers, effective dates, and badge/payroll numbers within the date range provided.	Workforce Administration, Job Information, Reports, Hire Report CAN	RUNCTL_FROMTHRU
PER103CN OEE Groups by OCC Group	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The report lists the totals of active workers within each defined area code(s) employed within the date range.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report	RUNCTL_FTCANAC
PER104CN OEE Groups by Employment Type	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Emplmt Type Rpt	RUNCTL_FTCANAC
PER105CN OEE Work Force Survey Stats	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats	RUNCTL_PER105CN

Report ID and Report Name	Description	Navigation	Run Control Page
PER106CN OEE Groups/Jobs Filled/Vacated	While the Ontario Employment Equity Commission (OEEC) no longer requires workers in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Groups/Jobs Filled/Vacated report lists the totals of active workers within the defined area code(s) employed within the date range.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups/Jobs Filled/Vacated	RUNCTL_FTCANAC
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the minimum, maximum, and midpoint rates for each grade. (XMLP, Crystal)	Compensation, Base Compensation, Salary Plan Reports, Salary Grade	PRCSRUNCNTL
PER706B Salary Grade/Step Table	Combines the information in the Salary Grade table and the Salary Step Components table into a list showing all grades for each salary plan that exists in your company and the hourly, monthly, and annual rate amount for any steps you set up. You can select to show the components in each step.	Compensation, Base Compensation, Salary Plan Reports, Salary Grade/Step	RUNCTL_PER706B
PER710 Action Reason Table	Lists the reason codes for each personnel action code and arranges them alphabetically by action. (XMLP, Crystal)	Set Up HRMS, Product Related, Workforce Administration, Action Reason Report	PRCSRUNCNTL
PER801SG Employee Listing	Provides worker information based on the run control selections of Department, Name, or EmplID.	Workforce Administration, Job Information, Reports, Employee Listing SGP	RUNCTL_EMP_LIST

Report ID and Report Name	Description	Navigation	Run Control Page
SOCS_AFI_ESP AFI Report	The AFI process generates a flat file that lists changes in workforce, such as hiring, terminations, personal or job data changes, for a given period. This file is submitted to the social security authorities.	Workforce Administration, Workforce Reports, AFI Report ESP	RC_SOCS_AFI_ESP
TAS001 Temp Assignment w/out End Date	Lists workers currently on temporary assignment where end dates have not been defined.	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date	RUNCTL_TAS001
TAS002 Temp Assignment due to Complete	Lists workers due to complete temporary assignments within user specified date range.	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete	RUNCTL_TAS002

Manage Base Benefit Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BEN001 Health Plan Participants Rpt	Lists active health plan participants as of a specified date. Useful for determining the number of workers in plan types offered by specific providers.	Benefits, Reports, Participation, Health Plan Participants	RUNCTL_ASODATE_BEN
BEN002 Life Insurance Participants Rpt	Lists active life plan participants as of a specified date. Useful for determining the number of workers in plan types offered by specific providers.	Benefits, Reports, Participation, Life Insurance Participants	RUNCTL_ASODATE_BEN
BEN003 Benefit Contributions	Summarizes benefit contributions by worker and employer.	Benefits, Reports, Contributions and Deductions, Benefit Contribution Register	RUNCTL_BEN003
BEN003CN Benefit Contributions Can.	Summarizes benefit contributions by worker and employer for Canadian companies. This report is the same as BEN003.	Benefits, Reports, Contributions and Deductions, CAN-Contribution Register	RUNCTL_BEN003CN

Report ID and Report Name	Description	Navigation	Run Control Page
BEN004 Savings Investment Distribution	Lists total deductions and company contributions for workers participating in savings plans with investment allocations. This program also creates an interface file for use by third-party administrators.	Benefits, Reports, Participation, Savings Investment Distributn	RUNCTL_BEN004
BEN007 Leave Accruals	This report displays leave accrual information by leave plan and worker. It includes information such as plan year eligibility hours, carryover hours earned year-to-date, hours taken year-to-date, and remaining leave balances.	Benefits, Reports, Participation, Leave Accrual	RUNCTL_BEN_LANG
BEN008 Section 415 Compliance Rpt	The report lists worker amounts either over or under the Section 415 limit. It includes: Company, EmplID, Effective Date, Special Accumulator, Benefit Program, Percent Of Salary, Maximum Benefit Base, and Gross Amount YTD. It also lists the plans that are excluded from and included in the 415 limit, as well as those plans that are limited.	Benefits, Reports, Regulatory and Compliance, Section 415 Compliance	RUNCTL_ASODATE_BEN
BEN009 Section 415 Non-Compliance Rpt	BEN009 reports on workers who have exceeded the Section 415 limits. It includes: Company, EmplID, Calendar Year and Month, Gross Amount YTD, Effective Date, Earnings Code, Benefit Program, Percent of Salary, and Maximum Benefit Base.	Benefits, Reports, Regulatory and Compliance, Section 415 Noncompliance	RUNCTL_ASODATE_BEN

Report ID and Report Name	Description	Navigation	Run Control Page
BEN020 FMLA Status Report	Displays summary information for requests in the following classes: approaching leave requests, current FMLA leave requests, recently completed FMLA leaves and denied FMLA leave requests. You can use this report to manage the FMLA leave process from beginning to end. A review of this report reveals those workers who will soon be going out on leave; what follow-up is needed to support the leaves; those workers who will soon exhaust their leave entitlement.	Benefits, Track FMLA (Family Medical Lv), Status Report	RUNCTL_BEN020
BEN021 FMLA Payroll Audit	For workers on FMLA leave or who have recently completed leaves, displays EmplID, name, FMLA request number, begin/return dates, job status, payroll earnings during leave period, FMLA hours taken (paid and unpaid), and the total difference between the hours reported as paid by Payroll and those marked as paid in the FMLA system.	Benefits, Track FMLA (Family Medical Lv), Payroll Audit Report	RUNCTL_BEN021
BEN022 BEN023 HIPAA Medical Certificates	BEN022 prints a eighteen-month history of a former worker's group health coverage for specified plan types, as specified by the Health Insurance Portability and Accountability Act (HIPAA) of 1996. BEN023 prints a history for a selected dependent. Only plan types with the HIPAA Plan check box selected on the Benefit/Deduction Program Table have HIPAA history displayed on these reports.	Benefits, Reports, Regulatory and Compliance, HIPAA	RUN_CNTL_HIPAA

Report ID and Report Name	Description	Navigation	Run Control Page
BEN040 Billing Statement	Prints a bill for all workers with outstanding balances who are actively enrolled in the Benefits Billing system. Statements report activity from/to dates; activity type, plan type, benefit plan, coverage, amount and due dates. Also included is the total due and total overdue information, with any comments entered on the billing calendar.	Benefits, Benefits Billing, Create Statements, Print Billing Statement	RUNCTL_BEN040
BEN041 Delinquent Acctnt	Displays charge and payment activity for workers who have failed to keep their payments current in accordance with the terms established on the Benefits Billing Plan Table. You can use this report to determine what participants are delinquent, the number of days past due and the total amount due. You can also use this report to learn what the total number of participants past due, time overdue and the total amount due.	Benefits, Benefits Billing, Reports, Delinquent Accounts	RUNCTL_BEN041
BEN042 Receivable Report	Displays all payment activity, include the amounts paid and how the amounts were applied. You can use this report to verify the dollar amount of payments received from workers. It can also be used to determine how the moneys received were applied. You can also use this report for general ledger reconciliation and auditing.	Benefits, Benefits Billing, Reports, Accounts Receivable	RUNCTL_BEN042

Report ID and Report Name	Description	Navigation	Run Control Page
BEN043 Billing History	Displays all billing account activity for a specific period of time, by worker. Use this report to answer questions from workers regarding their billing accounts. This report can also be used as a tool in troubleshooting and auditing billing activity. System prompts you to specify from and through dates.	Benefits, Benefits Billing, Reports, History Activity	RUNCTL_BEN043
BEN044 Billing Calculation Errors	Lists billing calculation errors.	Benefits, Benefits Billing, Review Processing Results, Calculation Error Report	RUNCTL_BILL_CAL
BEN045 Benefits Billing Audit	Displays workers with open charges and open credits; active enrollments audit; inactive enrollments audit; workers with holds longer than three months; and enrollment holds longer than three months. Use this report to audit billing enrollments that may require follow-up activity. For example, data will only be displayed for workers with open charges and credits when an error condition exists.	Benefits, Benefits Billing, Reports, Billing Audit	RUNCTL_BEN_LANG
BEN050 Primary Jobs Audit	Identifies workers without a record in the Primary Jobs table, workers without a job in the Primary Jobs table, workers without a primary job flag turned on, workers without a primary job indicated for a specific benefit record, and, workers with more than one primary job designated for a specific benefit record number.	Benefits, Maintain Primary Jobs, Create Audit Report	RUNCTL_BEN050

Report ID and Report Name	Description	Navigation	Run Control Page
BEN110 Snapshot Premium Reporting	Using the results from the Benefits Enrollment Snapshot, calculates the full premium due to a benefit provider and reports the coverage and premium amount for each covered employee, sorted by Vendor and Plan Type. You can run this report three ways: (1) Run just the "Snapshot Premium - Calculation" process, which is an Application Engine which calculates and stores the individual premiums; (2) Run just the "Snapshot Premium - Report" which is an SQR report that uses the previously calculated premiums to report by Vendor and Plan Type; or (3) Run the combined "Snapshot Premium Reporting" job, which links both the calculation process and the reporting process together into a single run using the same run control criteria.	Benefits, Interface with Providers, Snapshot Premium	RUNCTL_BEN110
BEN140 Ben Billing Payment Interface	This program reads payment information from a third-party interface file and posts those payments against open accounts. Lists information about Benefits Billing payments processed by the batch interface process. Can be used as an alternate to entering payments through the Payment Entry page. The system applies the payments to the charges by plan type within due date, oldest due date first. The payments are posted as of the posting date on the transaction.	Benefits, Benefits Billing, Billing Interface, Post Payments from File	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN141 A/R Interface	The A/R Interface report extracts all charges for a selected billing period and any charge adjustments with posting dates that fall within the billing period. The system will produce a file called BILLAR. The output file BILLAR holds 2 types of records. One holds worker information, the other holds the accounting information for the Benefits Billing charges and charge adjustments. Use this report to report to interface billing charges to an accounts receivable system.	Benefits, Benefits Billing, Billing Interface, Provide Billing to AR	RUNCTL_BILL_CAL
BEN701 FSA Benefit Table Listing	Lists information in the Flexible Spending Account Table. Use this report to verify that you have correctly updated and made changes to the table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Flexible Spending Account	RUNCTL_BEN_LANG
BEN702 Flat Rate Table	Prints information from the Flat Rate Table, where you define rates to be charged per selected frequency for a particular benefit program/plan.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Flat Rate	RUNCTL_ASODATE_BEN
BEN703 Disability Plan Table Listing	Prints information from the Disability Plan Table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Disability Plan	RUNCTL_BEN_LANG
BEN704 Age-Graded Rate Table Listing	The Age Coverage Table report lists the effective dates of the rates and rating factors such as age ranges, sex, and smoker/non-smoker by employer and worker for each set of your age-graded rates.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Age Coverage Rate	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN705 Life AD/D Table Listing	Prints information from the Life AD/D Plan Table, including plan type, plan name, benefit plan ID and name, effective date, coverage, flat amount, rating factor, and group code.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Life AD/D Plan Table	RUNCTL_BEN_LANG
BEN707 Savings Plan/ Investment Table	Prints information from the Savings Plan Table, including savings plan type, benefit plan, effective date, employer investment matching option, and the terms of the worker deductions and employer contributions and investment options.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Savings Plan	RUNCTL_BEN_LANG
BEN708 Calculation Rules Tbl Listing	Lists calculation rules information by calculation rule ID.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Calculation Rules	RUNCTL_BEN_LANG
BEN709 Benefit Plan Table Listing	Prints information from the Benefit Plan Table, including effective date, description, provider ID and name, default deduction code and name, and the indicator for non-discrimination testing.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Benefit Plan	RUNCTL_BEN_LANG
BEN710 Leave Plan Table Listing	Prints information from Leave Plan Table page 1, including plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Leave Plan- Basic Attributes	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN710A Leave Plan Table (Svc Rates)	Prints information from Leave Plan Table pages 2 and 3, including each plan type and its name and ID, effective date, service interval, separate service rate values and bonus values, pay versus time, pay at term, term pay percent, negative balances allowed, and individual first year rate values.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Leave Plan-Accrual and Bonus	RUNCTL_BEN_LANG
BEN711 Retirement Plan Table Listing	Lists information from the Retirement Plan Table, where you define retirement plans for the California Public Employees Retirement System (PERS).	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Retirement Plan	RUNCTL_BEN_LANG
BEN713 Benefit Program	Prints information from the Benefit Program Table, including associations between benefit programs and plans, rates, calculation rules, dependent rules, and payroll rules. This report serves as an audit trail for the information defined on the Benefit Program table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Benefit Program	RUNCTL_BEN713
BEN714 Service Rate Table Listing	Prints information about each service rate ID, including effective date, pay frequency, rate per unit, service intervals, total rate, employer portion, and worker portion. This report serves as an audit trail for the information defined on the Service Rate table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Service Rate	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN715 Vacation Buy/Sell Plan Listing	Prints each vacation buy/sell plan type name and ID and its effective date, buy/sell description, earnings type, pay frequency, vacation hours (increments, minimum, and maximum), and the percent of salary and maximum vacation amounts. This report serves as an audit trail for the information defined on the Vacation Buy/Sell table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Vacation Buy/Sell	RUNCTL_BEN_LANG
BEN716CN Pension Plan Table Listing 1	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, special accumulator code, pension plan type, voluntary contributions indicator, credit CPP indicator, RCT registration number, contribution percentage, and the worker and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan–Canada- Basic	RUNCTL_BEN_LANG
BEN717CN Pension Plan Table Listing 2	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, contribution rate type, the pension rate earnings limit, and the worker and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan–Canada-Rates	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN718CN Pension Plan Table Listing 3	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan name and ID, effective date, special accumulator, pension plan type, if voluntary contribution is allowed, pension administration percentage under and over the YMPE, pension administration earnings that are excluded, benefit entitlement ceiling, and the pension administration annual base hours. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan-Canada-Limits	RUNCTL_BEN_LANG
BEN720 FMLA Plan Table Listing	Prints information from the FMLA Plan Table, including FMLA calendar type, eligibility criteria, and the annual leave entitlement. This report serves as an audit trail for the information defined on the FMLA Plan table.	Set Up HRMS, Product Related, Base Benefits, FMLA (Family Medical LV), FMLA Plan Table Report	RUNCTL_BEN_LANG
BEN721 Limit Table List.	Prints information from the Limit Table, where you define government regulations that limit the amount that a participant can contribute or receive from a qualified plan. This report serves as an audit trail for the information defined on the Limit table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Limit Table	RUNCTL_ASODATE_BE N

Report ID and Report Name	Description	Navigation	Run Control Page
BEN731 Salary Rate Table	Lists information from the Salary Rate Table, where you define a percentage of salary for flexible credit options and deduction calculations. Includes effective dates of the salary percentages for a rate ID. This report serves as an audit trail for the information defined on the Salary Rate table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Salary Rate	RUNCTL_ASODATE_BE N
BEN733 Base Benefit Audit Report	Summarizes potential worker data error conditions as related to Base Benefits business process. Includes workers without Employment records, workers without Job records, workers under 16 years old, workers with unusual dependents signed up for coverage, workers with spouses (or other dependents) both electing health benefits, workers with overage dependent coverage, and workers with incorrect health plans set up on the Benefit Program Table.	Benefits, Reports, Audits, Base Benefits Consistency Audit	RUNCTL_BEN_LANG
BEN734 Court Orders Audit Report	Lists workers not compliant with court-ordered dependent benefit coverage or minimum spousal coverage.	Benefits, Reports, Audits, Court Ordered Coverage Audit	RUNCTL_BEN734
BEN740 Billing Calendar Table Listing	Use this report to list of generated billing periods. It is also a quick reference for payment due information by billing period. Displays the following information for each billing period: billing period identifier, begin/end dates, payment due date, COBRA payment due date, calculation run (y/n) and statements printed (y/n).	Set Up HRMS, Product Related, Base Benefits, Billing, Calendar Report	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
CBR001 COBRA Qualify Ltr	Generates letters that display a qualified COBRA participant's terminating health coverage, qualified COBRA coverage, and the response dates by which he or she must return the election or waive request. It also includes an enrollment form.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Initial Letter	RUNCTL_CBR001
CBR002 COBRA Secondary Notification Letter	Generates letters that display information about the extension of COBRA continuation coverage for COBRA participants who have experienced secondary qualifying events.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Secondary Letter	RUNCTL_CBR002
CBR003 COBRA Termination Letter	Generates letters that inform COBRA participants that their COBRA coverage is about to expire.	Benefits, Administer COBRA Benefits, Terminate COBRA Coverage, Create Termination Letter	RUNCTL_CBR003
CBR004 COBRA Open Enrollment Letter	Provides Open Enrollment forms for COBRA participants.	Benefits, Administer COBRA Benefits, Create Open Enrollment Letter	RUNCTL_CBR004
CBR005 COBRA Event Summary	Lists all workers for whom a COBRA event occurred, along with the event status.	Benefits, Administer COBRA Benefits, Review Processing Results, Event Summary Report	RUNCTL_CBR005
CBR006 COBRA Enrollment	Lists all COBRA participants and their current elections, including coverage begin dates.	Benefits, Administer COBRA Benefits, Review Processing Results, Enrollment Report	RUNCTL_CBR006
CBR007 COBRA Audit	Displays active workers enrolled in COBRA health coverage; workers and spouses (or other dependents) electing health benefits for the same dependent ID; and workers who have overage dependents.	Benefits, Administer COBRA Benefits, Review Processing Results, Audit Report	RUNCTL_ASODATE_BE N

Report ID and Report Name	Description	Navigation	Run Control Page
CBR008 COBRA Administration Error	Displays errors in the COBRA process, including COBRA event conflicts, lack of eligible benefit program or multiple eligible benefit programs, or duplicate COBRA events.	Benefits, Administer COBRA Benefits, Review Processing Results, Error Report	RUNCTL_CBR008
FGPY017 (USF) FEHB Reconciliation	Federal agencies are required to send quarterly reports to major FEHB providers. These reports allow the provider to compare their enrollment records with that of the federal agency. They also provide total headcount and premium amounts.	Benefits, Interface with Providers, FEHB Reconciliation Report	GVT_RUN_FGPY017
NDT004 401 Nondiscrimination Testing	Lists output from the 401(k) Nondiscrimination Testing SQR (NDT002) and from the 401(m) Nondiscrimination Testing SQR (NDT003).	Benefit, Conduct Nondiscrimination Tsts, Section 401 Testing, 401 Testing Report	RUNCTL_NDT004
NDT008 129 Nondiscrimination Testing	Lists the results of three Section 129 Nondiscrimination Testing SQRs: <i>NDT005</i> : Eligible Cross Section Test (eligible employees test) <i>NDT006</i> : 55% Average Benefits Test <i>NDT007</i> : Concentration Test (5% Owner Test)	Benefit, Conduct Nondiscrimination Tsts, Section 129 Testing, 129 Testing Report	PRCSRUNCTL
PAY031 Deductions and Benefits Register	Reports deductions taken, sorted by deduction code	Benefits, Reports, Contributions and Deductions, PI Benefit Deductions Register	RUNCTL_PAYINIT2
PAYVNDR Provider/Vendor	Lists information from the Provider/Vendor table, including provider name and ID, provider effective date, provider address, and a separate address line for premium payment, where applicable.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Provider/Vendor Listing	RUNCTL_PAYVNDR

Report ID and Report Name	Description	Navigation	Run Control Page
RDED001 Retroactive Deductions Requested - 'Not Processed Status'	Lists retroactive deduction requests that have not been processed.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Ben/Ded Pending Request Summary	RUNCTL_RTRODED1
RDED002 Retroactive Deductions in Progress - 'Calculate Status'	Lists retroactive deduction requests that have been processed.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Ben/Ded Calculations	RUNCTL_RTRODED1
RDED002B Retro Ben/Ded Summary	Summarizes retroactive deduction request information by emplID. Includes deduction type, deduction amount (old and new), and recalculated deduction amounts with the total due to or due by the worker.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Ben/Ded Load Summary	RUNCTL_BEN_LANG
RDED003 Retroactive Deductions Audit Rpt - 'Loaded to Paysheet' Status	Summarizes retroactive deduction information for requests loaded to the payroll system. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the worker.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Benefit/Ded Load Audit	RUNCTL_RTRODED3
RDED004 Retroactive Ben/Ded Terms Calculated (Terminated Employees Loaded)	Summarizes retroactive deduction information for requests loaded to the payroll system for terminated workers. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the worker.	Payroll for North America, Retroactive Payroll, Reports, Retro Benefit/Deduction Rpts, Retro Benefit/Ded Terminations	RUNCTL_RTRODED3

Manage Commitment Accounting Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BUD001 Department FTE	Run a Department FTE (department full time equivalent) report, which captures the difference between full time equivalent caps and FTE actuals for each department.	Set Up HRMS, Product Related, Commitment Accounting, Reports, Department FTE	RUNCTL_FRMTHRU_DP T
BUD004 Fiscal Year Budget	Produces a report that displays budget level definition for taxes, deductions, and earnings. Also reports the actuals to-date for the budget level, and the FTE (full-time equivalency) cap and maximum for the department. <i>See PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Commitment Accounting, "Defining Fiscal Year Budgets."</i>	- Payroll for North America, Payroll Distribution, Commitment Accounting USA, Fiscal Year Budget Report, Fiscal Year Budget Report - Payroll for North America, Payroll Distribution, Commitment Accounting CAN, Fiscal Year Budget Report, Fiscal Year Budget Report	RUNCTL_BUD004
BUD009 Encumbrance Messages	Run an Encumbrance Message report, which provides information on encumbrance processing error messages. Before using this page, you must have run the encumbrance processes	Set Up HRMS, Product Related, Commitment Accounting, Reports, Encumbrance Messages	RUNCTL_BUD009

Report ID and Report Name	Description	Navigation	Run Control Page
BUD011 Funding Summary	Run a Funding Summary Report page, which lists a summary of funding information for positions or workers within a department. This report can also print information about a specific position or worker when you enter worker or position information as a run control. Before using this page, you must have set up funding information for the departments on which you are reporting.	- Set Up HRMS, Product Related, Commitment Accounting, Reports, Funding Summary Report CAN - Set Up HRMS, Product Related, Commitment Accounting, Reports, Funding Summary Report USA	RUNCTL_BUD011C RUNCTL_BUD011
BUD012 FTE Rollup	Run an FTE Rollup report, which provides a detailed listing of total filled and vacant FTE (full time equivalent) counts by department.	Set Up HRMS, Product Related, Commitment Accounting, Reports, Full-Time Equivalent Rollup Report	RUNCTL_BUD012
BUD020 Retro Distribution	Report on the paychecks that have been modified using retroactive distribution. The report displays the old and the modified check data.	- Payroll for North America, Payroll Distribution, Commitment Accounting CAN, Retro Distribution Audit Rpt - Payroll for North America, Payroll Distribution, Commitment Accounting USA, Retro Distribution Audit Rpt	RUNCNTL_BUD020
HPCA010 Predistribution Audit	The Predistribution Audit report audits payroll and configuration data and identifies any errors that could be encountered when you run the Actuals Distribution or Actuals GL Interface processes. Run the Predistribution Audit report after you've run the Paysheet Create process, but before running the Actuals Distribution process.	- Payroll for North America, Payroll Distribution, Commitment Accounting CAN, Predistribution Audit Report - Payroll for North America, Payroll Distribution, Commitment Accounting USA, Predistribution Audit Report	HP_RUNCTL_PDAUDIT

Report ID and Report Name	Description	Navigation	Run Control Page
HPCA012 Fringe and Gross Report	Reports on the Pay Check Distribution records. Run after you've completed the Pay Check distribution process. You must set up column definitions and run the Fringe Gross Load process before running the Fringe and Gross report.	Payroll for North America, Payroll Distribution, GL Interface Reports, Gross and Fringe	HP_RCTL_GRSFR_RPT
PAY059 Encumbrance Accounting Line	Print details of encumbrance transactions that interface with PeopleSoft Enterprise General Ledger or Commitment Control.	Payroll, Payroll Distribution, GL Interface Reports, Encumbrance Accounting Line, Encumbrance Accounting Line Report	RUN_PAY059
PAY061 Employee Budget Check Log	Print details of employee budget check logs.	Payroll, Payroll Distribution, GL Interface Reports, Employee Budget Check Log, Employee Budget Check Log	RUN_PAY061
PAY062 Position Budget Check Log	Print details of position budget check logs.	Payroll, Payroll Distribution, GL Interface Reports, Position Budget Check Log, Position Budget Check Log	RUN_PAY062
PAY063 Budget Check Error	Create a report listing Document IDs that do not have a valid budget check status.	Payroll, Payroll Distribution, GL Interface Reports, Budget Check Error, Budget Check Error	RUN_PAY063

Manage French Profit Sharing Reports

Report ID and Report Name	Description	Navigation	Run Control Page
WP0001FR Individual Report	Provides workers with details of their profit sharing amount when these are calculated, or when a worker leaves the organization. This report can be delivered with the worker's payslip.	Compensation, Profit-Sharing FRA, Manage Profit Sharing, Individual Report	RUNCTL_WP_IND_RPT

Report ID and Report Name	Description	Navigation	Run Control Page
WP0002FR Agreement Report	This report is for administrators and lists all the workers that are eligible for a selected agreement and includes the status of the workers' funds, gross and net profit sharing amount, deductions, and investment method.	Compensation, Profit-Sharing FRA, Manage Profit Sharing, Agreement Report	RUNCTL_WP_AGRT_RPT

Manage French Public Sector Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FP_PROM Promotable Employees	Lists the workers promotable by a given date. To be launched after the FPA800 SQR. (XMLP, Crystal)	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Promotable Employees Report	RUNCTL_FPAPROM
FPA_CARB Career Simulation	Lists the simulated career data after reclassification or simulation of step increment.	Workforce Administration, Collective Processes, Manage Advancement FPS, Career Simulation Report	RUNCTL_FPACRYSTAL3
FPA025 Rating	Lists workers that have been evaluated and those who have not.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Evaluation Status FPS	RUNCTL_FPA025
FPA030 Adjustment Constant	Calculates and reports the adjustment constant per reviewer in a given corps	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Calc Adjustment Constant FPS	RUNCTL_FPA030
FPA110 Edit Individual Orders	Edits all individual orders for a period, status and action code.	Workforce Administration, Workforce Reports, Individual Orders Edit FPS	RUNCTL_FPA110J
FPA110 Edit Collective Orders	Edits all collective orders for a period, status and action code.	Workforce Administration, Workforce Reports, Collective Orders FPS	RUNCTL_FPA110C
FPA115 Collective Order Number Updating	Attributes a number to collective orders.	Workforce Administration, Workforce Reports, Collective Order Updates FPS	RUNCTL_FPA115

Report ID and Report Name	Description	Navigation	Run Control Page
FPA400 Part-Time Schedule	Lists part-time workers, whose part-time will end soon	Workforce Administration, Workforce Reports, Part-Time Schedule FPS	RUNCTL_FROMTHRU
FPA405 Current PPd Schedule	Lists workers nearing the end of their probation period.	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Current Probation Schedule Rpt	RUNCTL_FROMTHRU
FPA-AFFE Assignment – Request tbc	Lists requests for assignment changes that need to be approved	Workforce Administration, Workforce Reports, Assignment – Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA-CARR Career-Request tbc	Lists requests for career changes that need to be approved	Workforce Administration, Workforce Reports, Career – Request tbc FPS	RUNCTL_FPACRYSTAL1
FPACNTR Contribution Call Letters	Contribution call letters contain the worker's address and the contribution amounts. Launch this report after FPA1100 SQR.	Workforce Administration, Collective Processes, Contribution Call Letter FPS	RUNCTL_FPA1150
FPACNTR2 Contribution Call Letters	See above.	Workforce Administration, Collective Processes, Contribution Call Letter FPS	RUNCTL_FPA1150
FPAEE_CA Employee Career/Action	Lists worker career data. (XMLP, Crystal)	Workforce Administration, Job Information, Reports, Employee Career/Action FPS	RUNCTL_FPACRYSTAL2
FPAEE_PO CSPosition/Employee	Lists worker civil service position data. (XMLP, Crystal)	Workforce Administration, Job Information, Reports, CS Position/Employee FPS	RUNCTL_FPACRYSTAL2
FPAHISTA Assignment – Request Rejected	Lists rejected assignment change requests.	Workforce Administration, Workforce Reports, Assignment – Rqst Rejected FPS	RUNCTL_FPACRYSTAL1
FPAHISTC Career – Request Rejected	Lists rejected career change requests.	Workforce Administration, Workforce Reports, Career – Request Rejected FPS	RUNCTL_FPACRYSTAL1

Report ID and Report Name	Description	Navigation	Run Control Page
FPAHISTP CSPosition – Request Rejected	Lists rejected civil service position requests.	Workforce Administration, Workforce Reports, CSPosition – Rqst Reject FPS	RUNCTL_FPACRYSTAL1
FPAHISTS Compensation – Request Rejected	Lists rejected compensation change requests.	Workforce Administration, Workforce Reports, Compensation – Rqst Reject FPS	RUNCTL_FPACRYSTAL1
FPAHISTW Work Time – Request Rejected	Lists rejected work time change requests.	Workforce Administration, Workforce Reports, Work Time – Rqst Rejected FPS	RUNCTL_FPACRYSTAL1
FPA-POSI CS Position tbc	Lists civil service change requests requiring approval.	Workforce Administration, Workforce Reports, CS Position Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA_RAT List of Employees to be Rated (employee ID)	Lists workers to be rated according to attendance time, sorted by department or grade. Launch this report after FPA1200 SQR.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	RUNCTL_FPA1210
FPARAT2 List of Employees to be Rated (employee/department list)	See above.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	RUNCTL_FPA1210
FPA-REMU Compensation – Request tbc	Lists compensation change requests requiring approval.	Workforce Administration, Workforce Reports, Compensation – Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA-TDTR Work Time – Request tbc	Lists work time change requests requiring approval.	Workforce Administration, Workforce Reports, Work Time – Request tbc FPS	RUNCTL_FPACRYSTAL1
FPMACT1 Action List – Report 1	Lists action definition part 1.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List – Report 1	PRCSRUNCNTL
FPMACT2 Action List – Report 2	Lists action definition part 2.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List – Report 2	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FPMACTLE Actions/CS Position	Lists actions authorized by civil service position.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/CS Position	PRCSRUNCNTL
FPMACTPR Retro Prcs Action Rules	Lists the retroactivity rules for action codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Retro Prcs Action Rules	PRCSRUNCNTL
FPMACTST Actions/Status	Lists actions authorized by status.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/Status	PRCSRUNCNTL
FPMBUISN Occupation	Lists occupation codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Occupation	PRCSRUNCNTL
FPMCORPS Corps	Lists corps definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Corps	PRCSRUNCNTL
FPMINDEX Index Value	Lists index/amount values.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Index Value	PRCSRUNCNTL
FPMJOB CD Job Code	Lists job code definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Job Code	PRCSRUNCNTL
FPMLEGAL Civil Service Position	Lists civil service position definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Civil Service Position	PRCSRUNCNTL
FPMPOINT Type of Point	Lists type of point definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Type of Point	PRCSRUNCNTL
FPMRANK1 Grade List – Report 1	Lists grade definition part 1.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List – Report 1	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FPMRANK2 Grade List – Report 2	List grade definition part 2.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List – Report 2	PRCSRUNCNTL
FPMSALST Sal Grade Table/Scale-Steps	Lists salary grade table – steps.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Sal Grade Table/Scale-Steps	PRCSRUNCNTL

Manage Labor Administration Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR015 (USF) Union Membership	(For U.S. federal government users) Lists each union organization and the workers who are members. Before you run this report you must run the Refresh Employees Table process.	Workforce Administration, Labor Administration, Reports, Union Membership USF	PRCSRUNCNTL
HRLAY001 Layoff Roster	Report on the setup and roster list information of a layoff roster.	Workforce Administration, Labor Administration, Reports, Layoff Roster Report	HR_RUNCTL_LAY001
HRLAY002 Bumping	This report displays worker Job Data history and job hierarchy enabling you to determine who has bumping rights in the event of a layoff.	Workforce Administration, Labor Administration, Reports, Bumping Report	HR_RUNCTL_LAY002
HRLAY003 Seniority	lists workers, their seniority dates, and the values for those dates.	Workforce Administration, Labor Administration, Reports, Seniority Report	HR_RUNCTL_LAY003
HRLAY004 Candidate List	This report lists the workers with recall rights that have not expired.	Workforce Administration, Labor Administration, Candidate List Report	HR_RUNCTL_LAY004
HRLAY005 Recall Roster	Report on the setup and roster list information of a recall roster.	Workforce Administration, Labor Administration, Recall Roster, Recall Roster Report	HR_RUNCTL_LAY005

Report ID and Report Name	Description	Navigation	Run Control Page
HRLAY006 Layoff Roster Post Processing	When you process a layoff from the Process Layoff page, the process generates this report, listing those workers laid off. Note. The layoff process does not produce this report when you select the Auto Reinstatement check box on the Layoff Process page.	Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List Click the Run Layoff Process button.	HR_RUNCTL_LAY
HRLAY007 Recall Rights Post Processing	- When you process a layoff from the Process Layoff page, the process generates this report, listing those workers who have received recall rights. Note. The layoff process does not produce this report when you select the Auto Reinstatement check box on the Layoff Process page. - When you process a recall or reinstatement from the Recall/Reinstatement page, the process generates this report, listing the recall rights of the workers who were rehired.	- Workforce Administration, Labor Administration, Layoffs and Recalls, Layoff Roster, Layoff Roster List Click the Run Layoff Process button. - Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Candidate List Click the Run Recall Process button. - Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Candidate List Click the Run Reinst Process button.	HR_RUNCTL_LAY HR_RUNCTL_REINSTAT

Report ID and Report Name	Description	Navigation	Run Control Page
HRLAY008 Recall Post Processing	When you process a recall or reinstatement from the Recall/Reinstatement page, the process generates this report, listing those workers recalled or reinstated.	- Workforce Administration, Labor Administration, Layoffs and Recalls, Recall Roster, Recall Candidate List Click the Run Recall Process button. - Workforce Administration, Labor Administration, Layoffs and Recalls, Reinstatement Roster, Reinstatement Candidate List Click the Run Reinst Process button.	HR_RUNCTL_REINSTAT
OHS002 Discipline Action Summary	Summarizes all disciplinary actions taken against workers within a specified date range. The report itemizes actions by date, by incident, and by worker. (XMLP, Crystal)	Workforce Administration, Labor Administration, Reports, Discipline Action Summary	RUNCTL_OHS_FROMTO
OHS004 Grievance Detail	Lists the detailed grievance information for a formally filed grievance against the company. (XMLP, Crystal)	Workforce Administration, Labor Administration, Reports, Grievance Detail	RUNCTL_OHS_NONE
OHS005 Employee Disciplinary Action	Lists the detailed disciplinary action information for specific workers.	Workforce Administration, Labor Administration, Reports, Employee Disciplinary Action	RUNCTL_OHS005
OHS006 Grievance Summary	Summarizes the grievances filed against the company, along with the associated actions and resolutions. (XMLP, Crystal)	Workforce Administration, Labor Administration, Reports, Grievance Summary	RUNCTL_OHS_FROMTO
PER009 Union Membership	(For users in the USA and Canada) Lists each union organization and the workers who are members. Run the Refresh Employees Table process before running this report.	Workforce Administration, Labor Administration, Reports, Union Membership	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER053 ITA Equal Opportunities	Submitted every two years and consists of eight different tables. All companies with 100 or more workers are required to submit this report.	Workforce Administration, Labor Administration, Reports, Equal Opportunities ITA	RUNCTL_PER053
PER055 Union Fees	(ESP) Shows the workers and fees per union and month.	Workforce Administration, Labor Administration, Reports, Union Fees ESP	RUNCTL_PER055_ESP
PER059 Union Report ITA	(ITA) There are two Italian union reports. You can run a union report generating a list of workers and worker information by union. You can also run a union report listing the number of workers belonging to each union, sorted by category.	Workforce Administration, Labor Administration, Reports, Union Report ITA	RUNCTL_PER059
PER061 Labor Relations Letters	Generates various labor relations letters based on data supplied and the type of letter selected.	Workforce Administration, Labor Administration, Reports, Labor Relations Letters	RUNCTL_PER061
WP001 Employees Due Advancement	Create a list of all of the workers that the Process Wage Progression process will advance.	Workforce Administration, Labor Administration, Wage Progression, Process Wage Progression, Process Wage Progression	RUN_UPD_WP_ADV
WP002 Exceptions	Lists all workers within a Wage Progression Run ID group that have unacknowledged exceptions and indicates the exception type.	Workforce Administration, Labor Administration, Wage Progression, Wage Progression Exception Rpt, Exceptions Report	RUN_WP002

Manage Positions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR025 (USF) Active/Inactive Position	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Organizational Development, Position Management, Position Reports, Active/Inactive Positions USF	RUNCTL_FGHR025

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR026 (USF) Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Organizational Development, Position Management, Position Reports, Incumbent History USF	RUNCTL_FGASOFDT
FGHR027 (USF) Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Organizational Development, Position Management, Position Reports, Active Position History USF	RUNCTL_FGASOFDT
FGHR028 (USF) Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Organizational Development, Position Management, Position Reports, Exception Override USF	RUNCTL_FGHR028
FGOCC800 (USF) Occupation Series	Provides the details of the Occupational Series table. (Crystal)	Organizational Development, Position Management, Position Reports, Occupation Series USF	PRCSRUNCNTL
FGOF8 (USF) OF8 Report	This optional form provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.	Organizational Development, Position Management, Position Reports, OF8 Report USF	RUNCTL_FGOF8
FGPER815 (USF) Position Title Table	Generates a listing of the Position Title Table records. (XMLP, Crystal)	Organizational Development, Position Management, Position Reports, Position Title Table USF	PRCSRUNCNTL
FGPER823 (USF) Job Code	Print a list of all the job codes with effective dates.	Organizational Development, Position Management, Position Reports, Job Code USF	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR010 (USF) Vacant Position	Lists all currently vacant, budgeted positions in your organization.	Organizational Development, Position Management, Position Reports, Vacant Position USF	RUNCTL_FGHR010
POS001 Position Status	Inventories the types of positions in your organization, and lists all filled and vacant positions. (SQR)	Organizational Development, Position Management, Position Reports, Position Status	RUNCTL_ASOFDATE
POS002 Active/Inactive Positions	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (XMLP, Crystal)	Organizational Development, Position Management, Position Reports, Active/Inactive Positions	RUNCTL_POS002
POS003 Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Organizational Development, Position Management, Position Reports, Incumbent History	RUNCTL_ASOFDT_COM P
POS004 Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Organizational Development, Position Management, Position Reports, Active Position History	RUNCTL_ASOFDATE
POS006 Create Organizational Report	Provides a visual representation of reporting relationships among positions by level, if any, in the organization. (SQR) Before you can run this report, you must run the utility Build Position Structure, which links the positions in the system and creates the reporting hierarchy represented in this report.	Organizational Development, Position Management, Create Organizational Structure, Create Organizational Report	RUNCTL_POS006

Report ID and Report Name	Description	Navigation	Run Control Page
POS006A Build Position Structure	Links the positions in the system and creates the reporting hierarchy represented in the Create Organizational Report. (SQR)	Organizational Development, Position Management, Create Organizational Structure, Build Position Structure	RUNCTL_ASOFDATA
POS007 Vacant Position	Lists all currently vacant, budgeted positions in your organization. (XMLP, SQR)	Organizational Development, Position Management, Position Reports, Vacant Position	PRCSRUNCNTL
POS008 Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Organizational Development, Position Management, Position Reports, Exception/Override	RUNCTL_POS008

Manage Professional Compliance Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PCMP002 Compliance Plan	Provides complete details of a company's compliance plan.	Workforce Monitoring, Professional Compliance, Reports, Company Compliance Plan	RUN_CNTL_PCMP2
PCMP003 RI Observation	Provides complete details of a regulated individual observation.	Workforce Monitoring, Professional Compliance, Reports, RI Observation	RUN_CNTL_PCMP3
PCMP004 RI Review	Provides complete details of a regulated individual review.	Workforce Monitoring, Professional Compliance, Reports, RI Review	RUN_CNTL_PCMP4

Manage Profiles Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMM007 Licenses, Certificates Renewal	Lists which workers need to renew a license or certificate.	Workforce Development, Profile Management, Reports, Licenses/Certificate Renewal	RUNCTL_CMM007

Report ID and Report Name	Description	Navigation	Run Control Page
JPM_CATI_RPT Content Catalog Listing	Lists the content items that have been set up for a selected content type or for all content types.	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Catalog Listing	JPM_CATLIST_RPT
JPM_JPNP_RPT Non-Person Profile	Generate a PDF file for each non-person profile listed in the run parameters.	Workforce Development, Profile Management, Reports, Non-Person Profile Report	JPM_NPPROF_RPT
JPM_JPPP_RPT Person Profile	Generate a PDF file for each person listed in the run parameters. Each report shows all items in the person's profile that are effective as of the date specified in run parameters.	Workforce Development, Profile Management, Reports, Person Profile Report	JPM_PPROF_RPT
NVQ001 (GBR) UK NVQ - Employee Status	Lists workers assigned to an NVQ and their status. (XMLP, Crystal)	Workforce Development, Profile Management, NVQ Reports UK, Employee Status	PRCSRUNCNTL
NVQ002 (GBR) UK NVQ - Unit Listing	Lists all defined NVQ units. (XMLP, Crystal)	Workforce Development, Profile Management, NVQ Reports UK, Unit Listing	PRCSRUNCNTL
NVQ003 (GBR) UK NVQ - NVQ Listing	Lists all defined NVQ units. (XMLP, Crystal)	Workforce Development, Profile Management, NVQ Reports UK, NVQ Listing	PRCSRUNCNTL
NVQ004 (GBR) UK NVQ - Unit/Element Listing	Lists the elements associated with NVQ units. (XMLP, Crystal)	Workforce Development, Profile Management, NVQ Reports UK, Unit/Element	PRCSRUNCNTL
NVQ006 (GBR) UK NVQ - Employee Plan	Summarizes a worker's NVQ Unit plan. First run the NVQ - Initialize Plan process to generate this report. (XMLP, Crystal)	Workforce Development, Profile Management, NVQ Reports UK, Employee Plan	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER011 Competency Inventory	Lists workers in a department and their competencies. Run the Refresh Employees Table process before running this report to include any new workers and their associated competencies. Use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report.	Workforce Development, Profile Management, Reports, Competency Inventory	RUNCTL_PER011
PER034 Internal Resume	Creates a resume-like document from the data contained in the employee's PERSON profile and other information. Sections of the report include: name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards	Workforce Development, Profile Management, Reports, Internal Resume	RUNCTL_PER034

Manage Variable Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
VC001 Actual Award Report	Run the Actual Awards report after the system publishes the awards for payout. This report shows any modifications that you made to the award on the Award Allocations page.	Compensation, Variable Compensation, Award Reports, Actual Awards	RUNCTL_VC_REP
VC002 Budget Report	Helps you calculate how much funding to allocate to a plan.	Compensation, Variable Compensation, Variable Comp Reports, Budget	RUNCTL_VC_REP

Report ID and Report Name	Description	Navigation	Run Control Page
VC003 Calculate Awards Report	View the results of the Award Calculation process.	Compensation, Variable Compensation, Award Reports, Calculate Awards	RUNCTL_VC_REP
VC004 Carryover Report	View the carryover balances. The detailed report lists all workers in a plan by group and their carryover balances. The summary report lists the total carryover balance for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Award Reports, Carryovers	RUNCTL_VC_REP
VC005 Employee History Report	For each worker, the report lists target values, award values, and units by plan and payout period. It also prints the total values and units for each plan. In addition, select to print each worker's grand total values for all plans.	Compensation, Variable Compensation, Award Reports, Employee History	RUNCTL_VC_EEHIS_RP
VC006 Funding Allocation Report	After you allocate funds to groups, use the optional Funding Allocations report to review and evaluate the distribution of funds to all of the groups in the plan. The report lists all data as summary information at the group level.	Compensation, Variable Compensation, Variable Comp Reports, Funds Allocation	RUNCTL_VC_REP
VC007 Guarantee Report	View the worker guarantees. The detailed report lists all workers in a plan by group and their guarantees. The summary report lists the total guarantees for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Variable Comp Reports, Guarantee	RUNCTL_VC_REP

Report ID and Report Name	Description	Navigation	Run Control Page
VC008 Non Monetary Report	Track the number of units awarded under a plan and the value to workers. The report lists only awards that are beyond the status of Initial Calculation. The detailed report lists all workers in a plan by group, their target values, their calculated awards, their actual award in non-monetary units, and their actual awards as a monetary value. The summary report lists the total non-monetary units for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Award Reports, Non Monetary	RUNCTL_VC_REP
VC009 Plan History Report	The report provides information about the plan definition and lists award values, proration, and approver information by payout period for the plan ID that you specify on the run control page.	Compensation, Variable Compensation, Award Reports, Plan History	RUNCTL_VC_REP
VC010 Variance Report	View the variance between the target award and the actual award that appears on the Award Allocations page. The detailed report lists all workers in a plan by group, the worker's target award value, actual award value, and variance between the target and actual award. It also indicates whether the award is either the minimum or maximum payout under the plan. In addition, this report shows the total target award value, actual award value, and variance for each group and the grand total for the plan. The summary report lists the total target award value, actual award value, and variance for each group, as well as the grand totals for the plan.	Compensation, Variable Compensation, Award Reports, Variance	RUNCTL_VC_REP

Report ID and Report Name	Description	Navigation	Run Control Page
VC011 Organization and Group Goals Report	Provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.	Compensation, Variable Compensation, Variable Comp Reports, Organization and Group Goals	RUNCTL_VC_REP
VC012 Consistency Report	Provides a list of workers who have fallen off a tree and the groups to which they belonged. The variable compensation administrator or the workers' managers can use this information to ensure that these individuals get the appropriate awards.	Compensation, Variable Compensation, Variable Comp Reports, Tree Consistency Report	RUNCTL_VC_REP
VC013 Subscription Error Report	Run the Subscription Error report after receiving workflow email notification that an erred or rejected award has been returned from PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Stock Administration.	Compensation, Variable Compensation, Award Reports, Subscription Errors	RUNCTL_VC_REP
VCP001 Tree Member Overlap Report	Identifies workers who exist multiple times on a tree. This enables you to validate or correct the group membership, as appropriate.	Compensation, Variable Compensation, Variable Comp Reports, Tree Member Overlap	RUNCTL_VCP001

Meet Regulatory Requirements Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRS001 Adverse Impact	Provides information on recruitment and hiring practices; compares hiring decisions for white males to ethnic minorities and females. This report includes only those individuals for whom the applicable job actions were recorded during the date range you specify on the Adverse Impact page.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Adverse Impact	RUN_CNTL_REG
HRS002 Job Group Movement Analysis	Provides gender and ethnic group movements in and out of an organization and tracks career progression patterns.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Movement Analysis	RUN_CNTL_REG
OHS001 OSHA-200 Log	Lists the case numbers and details of each injury and illness that occurred during a particular calendar year.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, OSHA-200 Log	RUNCTL_CALENDARYR
PER016 EEO-1 Employer Information	Provides equal employment opportunity (EEO) information on private organizations. This report is compliant with the EEOC requirements for single and multi-establishment reporting. A single-establishment employer needs to file one report, while a multi-establishment employer must file separate reports.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Employer Info	RUNCTL_PER016
PER017 EEO-1 Job Analysis	Supplies standard job category counts instead of worker counts for the private sector.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Job Analysis Report	RUNCTL_PER017

Report ID and Report Name	Description	Navigation	Run Control Page
PER019 Terminations Analysis	Analyzes terminations within your organization according to predetermined groupings of age, years of service, gender, and ethnic group. It counts workers in each group, counts terminations, and expresses both counts as a percentage of the total population of active workers. It also calculates the termination rate. This report does not include workers whose Sex or Ethnic Group has not been indicated.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Terminations Analysis	RUN_CNTL_REG
PER022 EEO-5 Job Analysis	Supplies standard job category counts for school-related categories.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-5 Job Analysis	RUNCTL_PER022
PER024 Job Group Analysis	Analyzes the makeup of your workforce by establishment, EEO job group, job title, and salary grade. For a given job title and salary grade, the report provides totals by minorities, by gender, and by ethnicity within gender. Use this information to examine job groupings in relation to your company structure and to make changes and additions as needed.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis	RUN_CNTL_REG2
PER024A Job Group Analysis Summary	Analyzes the makeup of your workforce by job groups within each establishment. These totals are further broken down by minority and gender, and then by ethnicity within each gender.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis Summary	RUN_CNTL_REG2

Report ID and Report Name	Description	Navigation	Run Control Page
PER025 Workforce Analysis	Tracks hiring practices by department based on job titles, including the salary grade assigned to the title and the total number of workers and minorities who hold the title. Use the report to analyze patterns of discrimination in hiring practices. The report shows the percentage of minorities in each department.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Workforce Analysis	RUN_CNTL_REG2
PER027 VETS-100 Process	The report details the number of special disabled veterans, Vietnam-era veterans, and other protected veterans in your workforce by job category and hiring location, as well as the total number of workers, special disabled veterans, Vietnam-era veterans, and other protected veterans hired during the reporting period.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Process	RUNCTL_PER027
PER027B VETS-100 Analysis	Reports on the VETS-100 data created by the VETS-100 process.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Analysis	RUNCTL_PER027C
PER027C Vets-100 Submit	Creates the digital file for submission to the government. You must run the VETS-100 Process before running this report.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Submit	RUNCTL_PER027C
PER030 Job Group Roster	Lists personal and job data for workers such as ethnic group, gender, date they received the title, salary grade, hourly rate, monthly rate, department name, original hire date and job title at hire. Workers are grouped by their associated job group and establishment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Roster	RUN_CNTL_REG2
PER031 EEO-4 State and Local Government	Provides employment counts in the prescribed format for state and local governments.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-4 State/Local Govt	RUNCTL_PER031

Report ID and Report Name	Description	Navigation	Run Control Page
HR_RFWPRW_AE PRWORA - New Hire Report	Provides the criteria necessary to create the electronic report, along with a standard state (or Federal) PRWORA New Hire Report. This report is generated as an Adobe (PDF) file.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA-Newhire	RUN_RFWPRW_HR
PER040 IPEDS-S	The IPEDS-S (Fall Staff Survey) report is a mandatory report for U.S. higher education institutions that receive funding from a U.S. Federal government program. The report is divided into separate parts for different types of employee: full-time faculty members, other full-time employees, part-time employees, and new hires.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, IPEDS-S	RUNCTL_PER040

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements

(AUS) Meet Regulatory Requirements Reports for Australia

Report ID and Report Name	Description	Navigation	Run Control Page
PER712AUS ANZSCO	Prints a list of the ANZSCO reporting codes.	Workforce Monitoring, Meet Regulatory Rqmts AUS, ASCO Report	PRCSRUNCNTL

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(AUS) Meeting Regulatory Requirements for Australia"

(BRA) Meeting Regulatory Requirements Reports for Brazil

Report ID and Report Name	Description	Navigation	Run Control Page
BRCGED01 CAGED Report	The CAGED (<i>Cadastro Geral de Empregados e Desempregados</i>) report generates a file containing the monthly turnover of workers by establishment. Every establishment that has had any type of turnover (hiring, dismissing, or transferring worker that have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.	Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA	CAGED_RC_BRA
BREREG01 Employee Registry	The Employee Registry report generates a file containing workers' employment data, including hire date, retirement date, length of social security contributions.	Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA	EMPL_REG_RC_BRA

(CAN) Meet Regulatory Requirements Reports for Canada

Report ID and Report Name	Description	Navigation	Run Control Page
PER101CN Employment Equity	Creates an interface file to export to Canadian Employment Equity software. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Employment Equity	RUNCTL_PER101CN
PER102CN Canadian Official Languages Data File	Creates an import file to report official languages information. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Official Language Requirements	RUNCNTL_PER102CN
PER715CN Pay Equity Table	Lists job evaluation information. (Crystal)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Pay Equity	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER716CN National Occupation Codes	Lists the NOC codes used in categorizing your job codes. (XMLP, SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, National Occupation Codes	PRCSRUNCNTL

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

(FRA) Meet Regulatory Requirements Reports for France

Report ID and Report Name	Description	Navigation	Run Control Page
DIS001 Disability	Calculate the theoretical number of disabled workers who should work for the company and list the disabled workers, excluding temporary workers, trainees, and apprentices. For companies with more than 20 workers. (SQR) Before running this report, enter the correct codes in the INSEE (National Institute for Statistic and Economic Studies) Table and the correct Disability Rate code in the External Variables Table.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Disability	RUNCTL_DIS001_FRA
ELE001 Election	Provides the results of the staff representative elections for workers and management. (Crystal)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Election Report	RUNCTL_ELE001
HRSHSFRA Single Hiring Statement	A statutory report that is filed at the time of hiring new workers. The system uses information from your worker, company, and establishment tables to generate the report. (XMLP, Crystal)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Single Hiring Statement	SHS_FRA_RUN_CTL

Report ID and Report Name	Description	Navigation	Run Control Page
REG001FR Monthly Workforce	Lists the monthly personnel changes for a given establishment of a company. This report is required for all organizations that employ 50 or more workers. (SQR) Before running this report, define which contract types to include in the report using the Contract Type Group page.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Monthly Workforce	RUNCTL_REG001_FRA
REG002FR Personal Register	Lists workers for a given establishment of a company. Run the report for a specific establishment within an organization or for all the establishments or an organization. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Personal Register	RUNCTL_REG002_FRA
REG003FR Workforce by Nationality	Provides a comprehensive analysis of the foreign workforce employed in a company. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Workforce by Nationality	RUNCTL_REG003_FRA
REG004FR BIAF report	This statutory report is for workers on fixed-term contracts and details the worker's training entitlement.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, BIAF	RUNCTL_BIAF_FRA
SOC001 Employee Survey	Gives an annual snapshot of a company based on the calculation of several indicators, such as the number of workers in the organization and their average salary. (XMLP, Crystal) Before running this report, run the process to calculate the Employee Survey indicators using the Compute Employee Survey – Employee Survey Parameters Page. Check the results of the calculation and update them on the Edit Employee Survey Page.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Employee Survey Report	RUNCTL_SOC001

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

(GBR) Meet Regulatory Requirements Reports for the UK

Report ID and Report Name	Description	Navigation	Run Control Page
HRS001UK Adverse Impact	Displays the breakdown of job offers versus applications by UK-specific ethnic groups and by gender.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Adverse Impact	RUNCTL_FROMTHRU
PER019UK Termination Analysis	Displays the current worker count and the number of terminations.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Termination Analysis	RUNCTL_FROMTHRU
PER025UK Work Force Analysis	Tracks hiring practices by department, or other organizational units, based on job titles in the department.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Workforce Analysis	RUNCTL_PER025UK
PER030UK Job Group Roster	Lists your workers in job groups.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Job Group Roster	RUNCTL_PER030UK
PER037UK Joint Staffing	Gives a breakdown of your workforce by job code, gender, and full or part-time status.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Joint Staffing	RUNCTL_ASOFDATE
UKNI001 Northern Ireland	Indicates the religious composition of the workforce, job applicants, and appointees. The report format emulates the Monitoring Return, which is required by organizations operating in Northern Ireland.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, NI Fair Employments	RUNCTL_UKNI

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

(USF) Meet Regulatory Requirements Reports for the US Federal Government

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR012A EEO Groups by PATCOB/POI	Details the distribution of equal employment opportunity (EEO) groups and comparison by PATCOB and POI.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by PATCOB/POI USF	RUNCTL_FGHR012
FGHR012B EEO Groups by PATCOB/SubAgency	Details the distribution of EEO groups and comparison by PATCOB and sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by PATCOB/SubAgcy USF	RUNCTL_FGHR012
FGHR013A VETS-100 by SubAgency	Generates a Veterans employment report by sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by SubAgency USF	RUNCTL_FGHR013
FGHR013B VETS-100 by POI	Generates a Veterans employment report by POI.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by POI USF	RUNCTL_FGHR013
FGHR014A EEO Groups by Series/POI	Details the distribution of EEO groups and comparison by occupation and POI.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by Series/POI USF	RUNCTL_FGHR014
FGHR014B EEO Groups by Series/SubAgency	Details the distribution of EEO groups and comparison by series and sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by Series/SubAgcy USF	RUNCTL_FGHR014
FGHR019B CPDF Error	Lists the CPDF edit errors found in CPDF Error Processing. Before running this report, run CPDF Edits Processing to execute the COBOL program FGPCPDFF. This program generates a table of the CPDF edit errors found in the CPDF Status and Dynamic Tables.	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Error Report	RUNCTL_FGHR019B
FGSF113A SF113-A	Generates a monthly report of federal civilian employment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-A USF	RUN_FGSF113A

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF113G SF113-G	Generates a monthly report of full-time equivalent and work-year civilian employment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-G USF	RUN_FGSF113G

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Meet Regulatory Requirements, "(USF) Performing Regulatory Processing and Reporting"

Monitor Absence Reports

Report ID and Report Name	Description	Navigation	Run Control Page
ABS001 Absence Listing	Provides information about a worker's absence history. Note. Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Absence Listing	RUNCTL_ABS001
ABS002 Absence Periods	Provides information about the number of worker absence periods.	Workforce Administration, Absence and Vacation, Absence Reports, Absence Periods	RUNCTL_FROMTHRU
ABS003 Time Lost Due to Absence	Provides worker absence information. Note. Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Time Lost Due to Absence	RUNCTL_ABS003

Report ID and Report Name	Description	Navigation	Run Control Page
ABS004UK Bradford Score	Lists worker absences for the regulatory region of GBR only. It lists department, name, emplID, worker type, job title, total number of absences, total number of days absent, and the Bradford Score. The Bradford Score column of this report is calculated based on the following information: • Total number of absences (A) • Total number of days absent (B) • $A^2 \times B$ Note. Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Bradford Score GBR	RUNCTL_ABS004UK
ABS005NL Illness Registration (1)	Calculates the illness totals, percentages, and frequencies.	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD	RUNCTL_ABS005_NL
ABS006NL Illness Registration (2)	Same as above.	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD	RUNCTL_ABS005_NL

Report ID and Report Name	Description	Navigation	Run Control Page
ABS007NL Longterm Illnesses NLD	Provides a report of workers who have longterm illnesses from which they haven't fully recovered and are subject to the Dutch law <i>Wet Poortwachter</i> . You can use a worker checklist to track the status of a worker's illness. Note. This report can be run from PeopleSoft Human Resources or Global Payroll for the Netherlands. Based on the setting of the GPNLD installation flag, the report retrieves absence data from human resources or payroll tables.	Workforce Administration, Absence and Vacation, Absence Reports, Longterm Illnesses NLD	RUNCTL_ABS007_NL
ABS702NL Create Statistics	Create absence statistics for a company in the Netherlands. Run this process before creating an Illness Registration report. Run for a certain month of the year.	Workforce Administration, Absence and Vacation, Absence Reports, Create Illness Statistics, Create Statistics	RUNCTL_ABS702_NL

Monitor Health and Safety Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BRPPP01 PPP Report BRA	Add profile information to the system by establishment ID, department ID, group ID, or worker.	Workforce Monitoring, Health and Safety, Reports, PPP Report BRA	PPP_RC_BRA
OHS001CN Workers Compensation Board Form 7	Provides some of the information required for provincial WCB Form 7s. Use this report to manually transcribe information to the printed form required by the WCB in most Canadian provinces.	Workforce Monitoring, Health and Safety, Reports, WCB Form 7 CAN	RUNCTL_OHS001CN

Report ID and Report Name	Description	Navigation	Run Control Page
OHS001FR Work Accident Report	Tracks information on the employer, the establishment, the casualty, and details of the accident such as witnesses and other third parties. Use this information to complete the official French report.	Workforce Monitoring, Health and Safety, Reports, Work Accident FRA	OHS001FR
OHS001GR Accident Report	Provides information about the person injured, body parts, physician and hospital data, injury source and nature, unsafe acts, hazards, causes, corrective or preventative actions, and witnesses for the incident that you select. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Accident DEU	RUNCTL_OHS501GR
OHS001UK Injury/Dangerous Occurrence	Provides the data about health and safety incidents needed to meet the health and safety reporting requirements in the United Kingdom. (XMLP, Crystal) Before running the United Kingdom Injury or Dangerous Occurrence report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report. Note. To prepare the injury and dangerous occurrence report, you must first have entered an incident into the system using incident details.	Workforce Monitoring, Health and Safety, Reports, Injury/Dangerous Occ. GBR	RUNCTL_OHS_UK
OHS002GR Reportable Accident/Illness	Produces a Reportable Accident /Illness report for Germany.	Workforce Monitoring, Health and Safety, Reports, Reportable Accident/Illness DEU	RUNCTL_OHS002GR

Report ID and Report Name	Description	Navigation	Run Control Page
OHS002UK Illness Report	Provides information to meet the health and safety reporting requirements in the United Kingdom. (XMLP, Crystal) Before running the UK Illness report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report. Once the data in the report is complete, sign and mail it to the HSE (Health and Safety Executive).	Workforce Monitoring, Health and Safety, Reports, Illness GBR	RUNCTL_OHS_UK
OHS003 Non-Employees In Incidents	Summarizes the non-employees involved in incidents that occurred within a specified date range. It notes whether they suffered an illness or injury. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Non-Employees In Incidents	RUNCTL_OHS_FROMTO
OHS003GR Incident Location Summary	Provides information about travel, mode of transportation, details about whether drugs were involved, and details about individuals associated with the incident. This report is available only in German. (SQR)	Workforce Monitoring, Health and Safety, Reports, Incident Location Summ DEU	RUNCTL_OHS003GR

Report ID and Report Name	Description	Navigation	Run Control Page
OHS004GR Illness Report	Includes information about the individual, including personal data, nationality, children, job, and physician. To prepare the illness report, you must first enter an illness into the system using the GER Illness Tracking page group. The details of the illness must also be properly entered into the system. Before you run the report, run the SQR process GER Collect Illness Data (OHS504GR) to load the temporary data tables. This report is only available in German. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Illness DEU	RUNCTL_OHS504GR
OHS008BC Workers Compensation Board Incident	Provides specific incident information required by the Canadian Worker's Compensation Board, such as incident occurrence information, work absence and work resumption, the person responsible, first aid provided, and other information required by the WCB. Use information from this report to manually complete WCB reporting forms. (SQR)	Workforce Monitoring, Health and Safety, Reports, WCB Incident CAN	RUNCTL_OHS_INC
OHS009 Incident Detail	In addition to the occurrence information, the report lists all causes and related corrective actions, witnesses, involved persons (including detailed injury information), OSHA information, lost work, and physician information.	Workforce Monitoring, Health and Safety, Reports, Incident Detail	RUNCTL_OHS_INC
OHS010 Incident Summary	Summarizes health and safety incidents that have occurred within a specified date range. This report lists all involved persons and indicates whether an OSHA report was filed related to a person's involvement. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Summary	RUNCTL_OHS_FROMTO

Report ID and Report Name	Description	Navigation	Run Control Page
OHS011 Location Incident Summary	Summarizes the incidents that occurred at specific locations and within the specified date range. The report lists all persons involved in the incident and indicates whether or not they received an OSHA reportable illness or injury. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Location Incident Summary	RUNCTL_OHS_FROMTO
OHS012 Claim Summary Overview	Summarizes claims that have been logged within a specified date range. The report itemizes by amounts within a Charge Type, subtotals by Charge Type, subtotals by claim, and then calculates a grand total of all charges within the reporting period. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Claim Summary Overview	RUNCTL_OHS_FROMTO
OHS013 Employees In Incidents	Summarizes workers involved in incidents that have occurred within a specified date range. It notes whether the worker has suffered an injury or illness. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Employees In Incidents	RUNCTL_OHS_FROMTO
OHS014 Incident Lost Work	Lists the lost or restricted workdays for a worker involved in a health and safety incident within a specified reporting period and totals lost and restricted days by incident. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Lost Work	RUNCTL_OHS_FROMTO
OHS014ES Incident Without Lost Work	Generates a list of accidents that didn't result in lost workdays. This report prints the Name, Gender, NSS, Accident Date, and Accident Type. This report must be printed by Work Center. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident w/o Lost Wages ESP	RUNCTL_OHS_FROMTO

Report ID and Report Name	Description	Navigation	Run Control Page
OHS015 Incident Claim Detail	Lists the claims filed for a specific incident, the worker filing the claim, provider information related to the claim, and detailed charges (by charge type) related to the claim. The report subtotals by charge type within a claim, subtotals by the claim itself, and then provides a grand total of all claim charges for the incident. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Claim Detail	RUNCTL_OHS_INC
OHS016 Vehicle Incident Summary	Summarizes information about vehicles involved in incidents within a specified date range. The report lists the vehicle and equipment information and related information about the people involved. (XMLP, Crystal)	Workforce Monitoring, Health and Safety, Reports, Vehicle Incident Summary	RUNCTL_OHS_FROMTO
PER002CH Accident Report	Provides the information required by Swiss law in a format accepted by all Swiss insurance companies. (SQR) Use this report to create an accident report to submit to your organization's insurance company following an accident.	Workforce Monitoring, Health and Safety, Reports, Accident CHE	RUNCTL_PER002_CHE

Plan Careers and Successions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CARPLAN Employee Career Plan	Lists a worker's career plan as entered by different evaluators (Crystal).	Workforce Development, Career Planning, Career Reports, Career Plan	RUNCTL_CAR001
CARTRAIN Employee Career Training Plan	Lists a worker's training plan to meet career goals (XMLP, Crystal).	Workforce Development, Career Planning, Career Reports, Career Training	RUNCTL_CAR002

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR022 (USF) Individual Development Plan	Produces an Individual Development Plan (IDP) for a worker. (SQR). An IDP includes a worker profile, worker competencies, worker training history, potential job moves, mentoring, training, other specific developmental areas, summary of estimated costs, summary of actual costs, and a section for signatures.	Workforce Development, Career Planning, Career Reports, Individual Development Plan, IDP	RUN_FGHR022

Manage Base Compensation and Budgets Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP001 Salary Structure	Lists all salary grades in descending order by grade. For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.	Compensation, Base Compensation, Salary Plan Reports, Salary Structure	RUNCTL_ASOFDATA

Report ID and Report Name	Description	Navigation	Run Control Page
CMP002 Job Grading by Evaluation Points	Lists each salary grade in the organization along with salary data for all titles within that grade ordered by the job evaluation point assignment. The report includes all titles within that grade ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in your organization and consequently a compensation value to each salary grade. The report includes salary survey information and associated point ratios and midpoints.	Compensation, Base Compensation, Salary Plan Reports, Job Grading by Evaluation Pts	RUNCTL_ASOFDATA
CMP003 Compa-Ratio Analysis	The report lists each worker in the salary grade and the midpoint amount of the salaries in that grade. For each worker, the report lists job code, title, name, and department ID. The report displays those workers whose HR Status is <i>Active</i>, <i>Leave of Absence</i>, <i>Suspended</i>, or <i>Leave with Pay</i>. The last two columns pertain to a compa-ratio calculation for each employee. This means a comparison of the worker's salary to the midpoint amount of the salary grade. If the worker's current rate is the same as the midpoint, the compa-ratio is 1.00 or one hundred percent of the midpoint.	Compensation, Base Compensation, Salary Plan Reports, Ratio Analysis	RUNCTL_ASOFDATA

Report ID and Report Name	Description	Navigation	Run Control Page
CMP004 Below Minimum Analysis	The Below Minimum Analysis report lists the salary grades containing workers under the minimum, the associated minimum amount, the worker's annual rate, and the amount below both in dollars and as a percentage. The report displays those workers whose HR Status is <i>Active</i> , <i>Leave of Absence</i> , <i>Suspended</i> , or <i>Leave with Pay</i> .	Compensation, Base Compensation, Salary Plan Reports, Below Minimum Analysis	RUNCTL_ASOFDATA
CMP005 Above Maximum Analysis	For each worker, the report shows the job code and title, name, department ID, the maximum amount, the worker's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those workers whose HR Status is <i>Active</i> , <i>Leave of Absence</i> , <i>Suspended</i> , or <i>Leave with Pay</i> .	Compensation, Base Compensation, Salary Plan Reports, Above Maximum Analysis	RUNCTL_ASOFDATA
CMP008 Salary Change Mass Update by Salary Plan and Pay Group	Generate this report after running the Update by Salary Plan and Pay Group application engine process. The report displays the workers' previous and new compensation package. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure to run the Update by Sal (salary) Plan and Paygroup process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Sal Plan and Paygroup process run control page.	Compensation, Base Compensation, Maintain Plans, Update By Plan/Paygroup	RUNCTL_CMP008

Report ID and Report Name	Description	Navigation	Run Control Page
CMP010 Salary Mass Update by Job Code	Displays changes to the Salary Administration Plan, Grade and Step that will be made to workers' job records before you run the Load Data process (HR_SP_CI) to actually insert new job records. This report displays the workers' previous and new Sal Admin Plan (salary administration plan), Grade, and Step. Generate this report after running the Update by Job Code application engine process. The report displays the workers' previous and new salary administration plan, grade, and step. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure you follow to run the Update by Job Code process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Job Code process run control page.	Compensation, Base Compensation, Maintain Plans, Update by Job Code	RUNCTL_CMP010
CMP011 Salary History by Employee	Displays each salary change for a worker during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Compensation, Base Compensation, Compensation Reports, Salary History by Employee	RUNCTL_CMP011

Report ID and Report Name	Description	Navigation	Run Control Page
CMP014 Salary History by Group	Provides the salary changes for the workers in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Compensation, Base Compensation, Compensation Reports, Salary History by Group	RUNCTL_CMP014
CMP020JP (JPN) Salary Simulation	Generates the results of the Salary Increase Simulation process.	Compensation, Base Compensation, Percentage Increase JPN, Salary Simulation Report	RUN_SALREPORT_JPN
LMS001 and LMS002 Forecasted Compensation	Analyzes the impact on the forecasted period of the events defined in the scenario and the variations of the compensation and headcount over the two periods (LMS002: Variations).	Compensation, Forecast Compensation FRA, Process Forecast, Forecasted Compensation Rpt	RUNCTL_LMS_REPORT
LMS003 Scenario Comparison	Compare two scenarios.	Compensation, Forecast Compensation FRA, Process Forecast, Scenario Comparison Rpt	RUNCTL_LMS_REPORT
LMS004 Rate Codes Without Rate Code Class	Provides rate codes that don't have a rate code class attached to them. The Salary Forecasting calculation functions properly only when the rate codes assigned to individuals have an associated class. Check that all components of pay included in the compensation package of a worker have an associated rate code class. Run this report before you run the calculation process.	Compensation, Forecast Compensation FRA, Process Forecast, Rate Codes w/out Class Rpt	RUNCTL_LMS_RATE_C L
PER008 Review Audit	Lists all worker reviews for the workers in a group.	Compensation, Base Compensation, Employee Review History, Review Audit	RUNCTL_PER008

Report ID and Report Name	Description	Navigation	Run Control Page
PER012 Departmental Salaries	This report provides an alphabetical list of workers by department, basic job data information, and a breakdown of pay rates for each.	Compensation, Base Compensation, Compensation Reports, Salary History by Department	PRCSRUNCTL_LC_HR
PER013 Employee Compensation Changes	Lists workers who have had compensation rate changes within a selected time period.	Compensation, Base Compensation, Compensation Reports, Employee Compensation Changes	RUNCTL_PER013
PER023 Salary History for Company	Displays each salary change for a worker during a specified time period.	Compensation, Base Compensation, Compensation Reports, Salary History by Company	RUNCTL_PER023
PER041 Merit Increase Report	Lists the merit increases and their approval status for the workers in a merit group.	Compensation, Base Compensation, Merit Increases, Report Merit Increases	RUNCTL_SP_MERIT
PER062JP (JPN) Grade Advance Candidate List	Lists workers who are eligible to advance from the grade you enter.	Compensation, Base Compensation, Salary Plan Reports, Grade Advance Candidates JPN	RUNCTL_PER062_JPN
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.	Compensation, Base Compensation, Salary Plan Reports, Salary Grade	PRCSRUNCNTL
PER706B Salary Grade and Step Tables	Lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.	Compensation, Base Compensation, Salary Plan Reports, Salary Grade/Step	RUNCTL_PER706B

Performance Management Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HEP001 Missing Documents	Lists missing documents for a group of workers (Group ID) and a given document type and date range.	Workforce Development, Performance Management, Reports, Missing Documents Report	RUNCTL_EP_RPT
HEP002 Late Documents	Lists manager documents whose due date has passed.	Workforce Development, Performance Management, Reports, Late Documents Report	RUNCTL_EP_RPT

Report Total Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
TC001 Total Compensation Statement (Benefits Statement)	A listing of all compensation for each individual, designed for distribution to workers.	Compensation, Total Compensation, View Total Compensation, Total Comp Statement Report	TC_BEN_RUN_CNTL
TC002 Group Summary Compensation	Aggregated information for each individual within a group that you specify.	Compensation, Total Compensation, View Total Compensation, Group Summary Compensation Rpt	TC_GRP_RUN_CNTL
TC003 Employee Compensation Report	Detailed information about each compensation type for each individual within a group that you specify.	Compensation, Total Compensation, View Total Compensation, Group Detail Compensation Rpt	TC_GRP_RUN_CNTL

Track Faculty Events Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRH905CN StatsCan FT Survey (Statistics Canada full-time survey)	Lists the results of the Statistics Canada Academic Teaching Survey created using the Create Stats-Canada Survey component.	Workforce Development, Faculty Events, Load Teaching Data CAN, FT Survey Stats CAN Rpt	RUNCTL_HPH905CN

Report ID and Report Name	Description	Navigation	Run Control Page
PER045 Faculty Events	Lists an employee's tracking events, such as activities. Use this report as a template for Curriculum Vitae reporting.	Workforce Development, Faculty Events, Track Events, Faculty Events Hist Rpt, Faculty Events Report	RUNCTL_EVENTS
PER046 Case Review	Captures the case review details and the less secure details of the case review path.	Workforce Development, Faculty Events, Manage Cases, Case Review Status Rpt, Case Review Report	RUNCTL_CASE_REVIEW
PER047 Employee Tenure Status	Lists employee tenure status and home department information.	Workforce Development, Faculty Events, Tenure Reports, Employee Tenure Status	RUNCTL_EGPP03
PER050 Tenure Calc (tenure calculation)	Lists the calculated tenure service information in the temporary calculation file created using the Tenure Calc process in Normal Run mode. Before using this report, you must run the tenure calculation process at least once. You can run this report based on calculation name, or based on the business unit, department, and service calculation group. Administer Flexible Service also uses this report.	Workforce Development, Faculty Events, Tenure Reports, Tenure Calculation, Tenure Calc	RUNCTL_EGPP05
PER051 Tenure Service List	Provides detailed tenure service information for employees, such as tenure status and track start date. With this report, you can list employees by calculation group and within tenure service accruals between specific years. You can also sort by ascending or descending service time.	Workforce Development, Faculty Events, Tenure Reports, Tenure Years of Service, Tenure Service List	RUNCTL_EGPP06

Track Flexible Service Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER048 Employee Service Listing	Lists employees by calculation group and service type and within specified time periods. Sort by ascending or descending service time.	Workforce Administration, Flexible Service EG, Employee Service Report	RUNCTL_EGPP04
PER049 Employee Service Calculation Results	Lists the results of the Normal Run background process and includes all employees who have a temporary file (resulting from a process in Normal Run mode) containing details about their accrued service credits.	Workforce Administration, Flexible Service EG, Calculated Service Report	RUNCTL_EGPP05

Track Global Assignments Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER717 Employees on Assignment	Lists employees on assignment. (XMLP, Crystal)	Workforce Administration, Global Assignments, Track Assignment, Employees on Assignment Report	RUNCTL_PER717

PeopleSoft HRMS Reports: Selected Reports

This section provides detailed information on individual reports. The reports are listed by report ID.

PER044 - Multiple Seniority Components – Basic Report

The report provides the following information regarding the origin of the seniority rate code:

- If the worker receives a seniority pay component as a result of belonging to a group associated with a seniority rate code, the report displays the corresponding group ID for the seniority rate code.
- If a worker receives the seniority pay component because the seniority rate code is associated with all workers, the report displays *All* as the origin of the seniority rate code.

- If a worker receives the seniority pay component because you manually added it, the report displays *Manually Added* as the origin for the seniority rate code.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Compensation, "Administering Seniority Pay"

PER033 - Citizenship/Country/Visa Audit – Administer Workforce

The report flags six different types of discrepancies. Specifically, it flags job records when the following pairs of data exist:

Citizenship Status	• Native or Naturalized. • Not Native or Naturalized.
Country of Citizenship	• Not the local country. • The local country.
Visa Record	• Exists for the local country. • Doesn't exist for the local country.

The report puts a page break between categories.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Managing Citizenship and Visa or Permit Information

PER058 - Primary Job Audit – Administer Workforce

One important reason to designate primary and secondary jobs is to create accurate data for regulatory reporting. By running reports for a worker's primary job only, you create an accurate worker count for affirmative action and other government reports. However, the flexibility PeopleSoft Human Resources gives you to designate primary and secondary jobs could compromise the accuracy of your reporting data. It's possible to have workers who have no job designated as a primary job, or more than one primary job, or an inactive job designated as the primary job. We recommend checking regularly to correct these kinds of discrepancies in your worker job records. Use the Primary Job Audit report to check for discrepancies in the primary job designation for workers with multiple jobs.

This report lists all workers whose job records show the following potential problems:

- Multiple primary jobs: More than one active job is currently designated as a primary job.

- Terminated primary job: The primary job was terminated and a nonprimary job is the active job.
- No primary job: None of the person's concurrent jobs has been chosen as the primary job.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Workforce, "Updating Person and Job Information," Running Job Data Reports

PER066JP - JPN Employee Assignment List Report

This report lists workers by department and supervisor level including workers with additional appointments.

To run the report, at least one Department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by Department then:

- Employees with supervisor levels registered in the Supervisor Level tree, in tree order.
- Employees with supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Workers without supervisor levels, in alphanumeric emplID order.

Note. The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL if the system is to use it. If you have not defined a Supervisor Level tree with that name, sorting will be in alphanumeric supervisor level order.

POS006A - Build Position Structure – Manage Positions

After you enter all the reporting relationships among positions in the Position Data component, run this SQR. The Build Position Structure report enters a value in the ORG_CODE field and defines the position in the hierarchy. When you run the Build Position Structure report the system updates the position structure with data valid before or on the As of Date you specify.

You should run this report when you first enter the reporting relationships, any time you add new positions, and when you change reporting relationships among existing positions. You must run this SQR before you can run the Indented Position Hierarchy report, POS006.

When you run Build Position Structure, the system may generate one or more diagnostic messages to help you understand the utility output. They are as follows:

- If the utility doesn't find a root position (a position that reports to itself), it displays an error message. If you do not have a root node, the utility can not produce a report.
- If you have circular reporting conditions, such as when position 1 reports to position 2, and position 2 reports to position 1, the utility displays a warning message and the positions will not appear in the report.

- If you do not have data in the Reports To Position field for a position, the utility displays a warning message. These positions will not appear in the report.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Maximizing Position Data," Running the Organizational Structure Reports

POS008 - Exception/Override – Manage Positions

You can print incumbent job data where you have prevented automatic cross-updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions).

The Exception/Override report lists the position name and the name of the worker assigned to the position and shows the data in the fields that match in the Position Data component and Job Data component. The report displays those workers whose HR Status is *Active*, *Leave of Absence*, *Suspended*, or *Leave with Pay*.

When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints *Match* or *No Match* in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Positions, "Managing Position Data," Verifying Position Data

PKG006 - Salary Packaging FBT Reconciliation – Administer Salary Packaging

For reporting purposes you need to identify all the different categories of fringe benefits and the taxable value of the benefits. In the FBT Reconciliation report, all FBT categories are identified, based on the component types you define on the Package Component table component. For each component type, or FBT category, you can see the workers who have received this benefit in the FBT year. You also see information on the budgeted and the actual gross taxable value of the benefits. These values are shown for each worker and as a total for each component.

You can combine the information provided in the FBT Reconciliation report with information from your other administrative systems to accurately complete your FBT return for the Australian Taxation Office.

Note. The FBT Reconciliation Report includes values calculated during the Package Expense Calculation. To ensure that you get accurate totals included in the FBT Reconciliation report, execute the Package Expense Calculation at the end of the FBT Year for which to run the FBT Reconciliation report. You must complete this before running the report.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Administer Salary Packaging, "Managing Salary Packages," Running Salary Packaging Reports

HRH905CN - StatsCan FT Survey – Track Faculty Events

After you submit your full-time and part-time Academic Teaching Survey report flat files to Statistics Canada, you receive a summary report from Statistics Canada. Use the StatsCan FT Survey report to compare your results with Statistics Canada's summary.

The report consists of four pages; each includes full-time survey salary calculations based on different selection criteria:

- Including administrative posts and medical and dental categories.
- Including administrative posts, excluding medical and dental categories.
- Excluding senior administrative duties, including medical and dental categories.
- Excluding senior administrative duties and medical and dental categories.

VC011 – Organization and Group Goals – Manage Variable Compensation

The Organization and Group Goals report is an optional report that you can run before or after the goal measurement period. This report provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.

This report provides the following information:

- The Plan Goal Weights for the variable compensation plan ID and period ID.
- A list of all organization weighted goals in the plan with their weighting percent and attainment percent.
- A list of all group weighted goals in the plan by group with their weighting percent and attainment percent.

If the group does not have goals, the report indicates that the child group's goals are the parent group's goals.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Variable Compensation, "Setting Up and Using Weighted Goals," Running the Organization and Group Goals Report

VC013 – Subscription Error – Manage Variable Compensation

This report identifies each individual who had either an erred or rejected award under the variable compensation (VC) plan ID and payout period ID. For each erred or rejected award, the report identifies the worker, award value, award status, and rejection reason (payroll only).

The following are the valid payroll rejection reason codes:

- Invalid Earning Code (Invalid EC)
- Invalid Employee ID & Record # (Invalid EE)
- Invalid Currency Code (Invalid CC)
- Transaction already exists (Tran exist)
- Amount Exceeds Payroll Maximum (Exceed Max)
- Reject All -Request by User (Reject All)

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Variable Compensation, "Managing Awards Approval and Payout," Reporting on Award Payout and Distribution

BEN004 - Savings Investment Distributions – Base Benefits

This report lists the total deductions made to date and the total company contributions for workers participating in benefit programs that contain savings plans. It prints the total amount available for investment broken down by investment distribution and expressed both as a monetary amount and as a percentage of the total.

For each plan type, it shows the total amount deducted for workers in the plan type and company contributions. The report inserts page breaks and supplies totals at the company, benefit program, plan type, and benefit plan levels.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits

BEN733 - Base Benefit Audit – Base Benefits

The Base Benefits Audit Report provides a summary of potential worker data issues as related to Base Benefits business process that would enable you to catch errors that would otherwise show up when you try to process enrollments or changes.

The audits performed are Employees without Employment records, Employees without Job records, Employees less than 16 years old, People with unusual dependents signed up for coverage, Employee and spouse (or other dependent) both electing health benefits, Employees with over-age dependent coverage, Employees with incorrect health plans set up on the Benefit Program Table, and audits for consistency of marital and dependent relationships.

Perform these audits during implementation, before you enroll participants, and periodically during the plan year.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits

CBR005 - COBRA Event Report – Base Benefits

This report provides data about COBRA beneficiaries at the Event Level. The report will list all workers to whom an event has occurred. The qualified status indicates whether the qualified beneficiary is Qualified (QL), Not Qualified (NQ), Not qualified/duplicate (ND) or QE (Qualify Error).

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits

CBR007 - COBRA Audit – Base Benefits

This report displays information on: Employees enrolled in Active and COBRA Health Coverage; Employee and Spouse (or other dependent) electing health benefits for the same Dependent ID; and workers who have overage dependents.

You can use this report to analyze whether there is an overlap in COBRA and Active coverage, whether dependents are being covered by more than one EMPLID or whether an overage dependent has not been detected.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits

CBR008 - COBRA Administration Error – Base Benefits

This report displays information about errors that result from running the COBRA process. The errors include COBRA event conflict, no eligible benefit program or more than one eligible benefit programs, or duplicate COBRA events.

You can use the COBRA Administration Error Report to identify and troubleshoot errors that surface as a result of COBRA processing. You can also identify these errors online. You might want to print the report and request that staff check off each error as they determine a resolution, thereby creating an audit trail for verifying that all errors have been analyzed.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits

NDT004 - 401(k)/401(m) Nondiscrimination Testing – Base Benefits

Specify 401(k) or 401(m) for the report output.

If this report is run mid-year and a forecast percentage is specified in the 401 NDT run control, the report also shows forecasted year end earnings, contributions, and related ADP/ACP results.

This report does not attempt to recalculate the Actual Deferral Percentage (ADP) or to determine whether the nondiscrimination tests passed. It assumes these tests were handled by the NDT002 or NDT003 SQRs. However, in cases where the Aggregate Limit Test must be used, this report serves as the only method to invoke the test; there is no separate SQR for this.

If the Aggregate Limit Test is invoked, each report includes results for both the 401(m) and 401(k) tests, as well as the Aggregate Limit Test pass/fail status. The system prevents you from initiating NDT004 if the run control has been updated and you have not initiated these SQRs:

- *NDT001*: This SQR lists plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.
- *NDT002*: You initiate this SQR after NDT001 to update the actual and forecasted amounts in the nondiscrimination testing run control table for the 401(k) NDT.
- *NDT003*: This SQR updates the actual and forecast 401(m) amounts in the nondiscrimination testing run control table for the 401(m) NDT.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage Base Benefits

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