PeopleSoft 8.00.01 Application Fundamentals for HRMS PeopleBook

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About This PeopleBook

PeopleSoft Application Fundamentals for HRMS consists of important topics that apply to all PeopleSoft HRMS applications across the HRMS application line. Whether you are implementing only PeopleSoft Human Resources, some combination of applications within our HRMS line (for example, HR, Benefits Administration, and Payroll), or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

We've included common information pertinent to all applications in the HRMS application suite, including information about working with Business Units and SetIDs, regulatory regions, multiple currencies, languages, and pay components. If you're upgrading from a previous PeopleSoft HRMS release, you may notice that we've pulled out some topics from the individual application PeopleBooks and consolidated them in this single reference book. This makes the documentation as a whole less redundant; and throughout this book, we provide cross-references to other PeopleBooks, as necessary.

The PeopleSoft Application Fundamentals for HRMS consists of the following chapters:

Regulating HRMS System Data reviews the Business Unit/SetID feature which allows you to organize your businesses by dividing them into logical units other than Companies and Departments, and also allows you to control how your organizational data is shared among those organizational units.

Processing Transactions Using Regulatory Regions discusses the Regulatory Region concept, how Regulatory Regions are set up in your PeopleSoft HRMS, and how to set up additional Regulatory Regions, if necessary.

Working with Currencies explains how to track personnel salaries and reimbursement amounts in multiple currencies, or in 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.

Working With Languages discusses PeopleSoft's language support features.

Setting Up Control Tables discusses the different ways you can run PeopleSoft Human Resources and helps you decide which way it should be used. Setting Up Controls Tables also instructs how to set up data that serves as the foundation of your organization's human resource system. These tables are the basis not only for Human Resources, but all your PeopleSoft HRMS applications.

E&G Setting Up Service Parameters and Service Accrual Control Tables is a section for Education and Government users that discusses how you set up methods to handle time duration for measuring accrued service for employees in public sector organizations.

USF Setting Up Your Work-in-Progress Management System is a section for U.S. Federal Government users that explains how to set up the system to automatically route a wide variety of requests directly to reviewing officials, and on to human resources, in the specific path that your organization chooses.

Administering Security reviews how to set up and maintain security for employee data by using a security tree. This allows you to view and update the reporting relationships among units and use this information to grant and deny user access to employee data. You can also choose to set up employee data security in other ways, if that is what you need.

Using Mass Change describes how you can select a particular set of employee records from the database, define the alteration you would like to perform on those records, and make those changes in the background, using scheduled processing.

Using Workflow explains how you can use workflow to streamline processes, save time, improve efficiency, and increase your reporting options, using workflow tools to tie together individual business process steps so that the system can help coordinate the activities.

Working with Multiple Components of Pay discusses how you use the system to tailor unique compensation packages for each of your employees or create default pay component packages that are consistent for jobs and salary steps throughout your organization.

Working with Multiple Jobs explains how several PeopleSoft HRMS applications enable you to process information for employees who hold multiple, concurrent jobs within an organization.

Working With Groups shows you how to use the Group Build functionality in HRMS, which gives you a standardized way to create groups of employees and non-employees. Once you've created a group using this feature, you can use it across several HRMS applications for a variety of purposes.

Generating Form Letters explains how to can create form letters in your word processor by directly accessing the data you need from your database, using Microsoft Word for Windows as the word processor and sample form letters delivered with your system.

Application Fundamentals Reports describes the standard reports provided by PeopleSoft Human Resources 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.

About This PeopleBook

The book provides you with the information you will need for implementing and using PeopleSoft Application Fundamentals for HRMS. You can order the online version by requesting SKU HRB8SP1R0, or the hard-copy version by requesting SKU MAHFr8SP1B 1200.

This section describes information you should know before you begin working with PeopleSoft applications and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS application line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft menus and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate around the PeopleSoft system, much of the information in this book isn't procedural. That is, it doesn't typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.00.01 HRMS* and *PeopleTools 8.12 Peoplebooks,* SKU CD HRB8SP1R0.

Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

- PeopleSoft *8.00.01* Application Fundamentals for HRMS
- PeopleSoft *8.00.01* Base Benefits
- PeopleSoft *8.00.01* Benefits Administration
- PeopleSoft *8.00.01* eBenefits
- PeopleSoft *8.00.01* eCompensation
- PeopleSoft *8.00.01* eDevelopment
- PeopleSoft *8.00.01* eEquity
- PeopleSoft *8.00.01* ePay
- PeopleSoft *8.00.01* eProfile
- PeopleSoft *8.00.01* eRecruit
- PeopleSoft *8.00.01* eTime
- PeopleSoft *8.00.01* FSA Administration
- PeopleSoft *8.00.01* Global Payroll
- PeopleSoft *8.00.01* Human Resources
- PeopleSoft *8.00.01* Payroll for North America
- PeopleSoft *8.00.01* Payroll Interface
- PeopleSoft *8.00.01* Pension Administration
- PeopleSoft *8.00.01* Stock Administration

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft Internet site: http://www.peoplesoft.com/.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Email CPI at callcenter@conpub.com.

PeopleBooks Standard Page Element Definitions

Throughout our application documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions.

Field	***Definition***
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 Payroll for North America or PeopleSoft 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.

Field	*Definition*
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Description	Freeflow text up to 36 characters that describes what you are defining.
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 and batch processes that use the information use the current row. For more information about effective dates, see Using PeopleSoft Applications, "Working With Browser-Based Applications"
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one 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/applicant/non-employee.

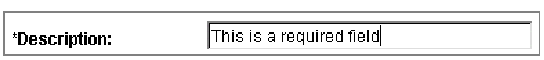
Field	*Definition*
Language or **Language Code**	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a 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 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)

Field	***Definition***
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	Identifies a report.
Report Manager	This button takes you to 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	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Manager, “Process Scheduler Basics”
Run Control ID	Identifies specific run control settings for a page.
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.

Field	*Definition*
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 ***Active*** or ***Inactive.***
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.
User ID	Identifies the individual that generated the transaction.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can't save a page without entering data into all of the required fields on a page.



Example of a required field label

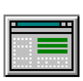
In some unique instances, a field may be required although there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Jump links	Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section.
Cross-references	The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:
•	For more information, see Documentation on CD-ROM in *About These PeopleBooks:* Additional Resources.
Topic list	Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents window.
 Name of Page	Opens a pop-up window that contains the named page. Click the button to display the page. Some screen shots may also appear inline (directly in the text).

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page Introductory Table

In the documentation, each page description in the application will include an introductory table with pertinent information about the page. Not all of the information will be available for all pages.

Usage	Describes how you would use the page or process.
Object Name	GIVES THE SYSTEM NAME OF THE PAGE OR PROCESS AS SPECIFIED IN THE PEOPLETOOLS APPLICATION DESIGNER. FOR EXAMPLE, THE OBJECT NAME OF THE DETAIL CALENDAR PAGE IS DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page or process.
Prerequisites	Specifies which objects must have been defined before you use the page or process.
Access Requirements	Specifies the keys and other information necessary to access the page. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a Note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

mailto:DOC@PEOPLESOFT.COM

While we can't guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our application communications for you.

CHAPTER 1

Regulating HRMS System Data

As companies grow larger and more complex, either through domestic growth or through expansion into the global marketplace, they often discover a need to collect the same type of data over many locations. The Business Unit/SetID feature enables you to organize your businesses by dividing them into logical units other than Companies and Departments–a necessary feature for companies operating in the global market. This feature also enables you to control how you share your organizational data among those organizational units. Business Units and SetIDs provide you with a mechanism that enables the flexible grouping of your people assets and minimizes the administrative burden of maintaining organization attributes.

Overview of Regulating HRMS System Data

Business Units

Business Units are logical units created within your organization for reporting purposes and don't have any predetermined restrictions or requirements. This flexible structuring device enables you to actually define a higher level of reporting for your employees and group them according to functional or administrative tasks or for your business purposes. You can define Business Units that reflect the specific functional needs of your internal human resources departments, or reflect the actual business structure of your enterprise. Your Business Units may be, for example, companies, agencies, subsidiaries, divisions, departments, or branch offices within your organization. Or, you may choose to have a single Business Unit represent your entire organization. It's up to you and your unique business needs.

TableSets and SetIDs

Once you've established Business Units, you can define TableSets, or groups of tables, for your system-wide control tables, so that you can share the same code values among multiple Business Units within your enterprise. Conversely, the TableSet feature also enables you to limit access to specific data to only those users who need it, while maintaining all of your data on the same tables. The flexibility to share TableSets among Business Units enables you to centralize redundant information while you keep other information, such as Department and Job Codes, decentralized. You can use Business Units and TableSets to associate a Business Unit with employees in your enterprise and to specify how default values for currencies and country codes will behave throughout the HRMS system, based on either the user's Permission List or the Business Unit that the system is referencing during a particular business process or activity.

Where a Business Unit organizes your company or your organization, SetIDs help you organize your data within the system. The HRMS system uses tables (Control Tables or Prompt Tables) that use a high-level key that enables you to identify and retrieve data from the system. A secondary high-level key, referred to as a SetID, has also been added on various tables. SetIDs are simply the labels used to identify a TableSet. Business Unit and SetID functionality in PeopleSoft HRMS also provides you with a higher business level for reporting purposes and other business data roll-up.

Enterprise Integration Points Related to the Business Unit Table

When you add, delete, or change information in the PeopleSoft HRMS Business Unit records, the system automatically publishes the Business Unit Table HR EIP message to any other PeopleSoft or third-party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message.

For more information regarding the subscribers and technical details of the Business Unit Table HR EIP, see Business Unit Table HR. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

Before You Begin

Before you implement PeopleSoft HRMS for your organization, you should take a close look at how your business operates. To make the most of the flexible design of PeopleSoft HRMS, you must first analyze how you want to map your organization's business structures, practices, and procedures into PeopleSoft HRMS.

Once you've developed your Business Unit map, use the following tables to set up Business Units and SetIDs and to define system defaulting based on Permission Lists or Business Units:

Feature	***Location***
TableSetID	**PeopleTools, Utilities, Use, TableSetID.**
Business Unit	**Define Business Rules, Manage Human Resources, Setup, Business Unit.**
Permission List Preference Defaults/Settings	**Define Business Rules, Define General Options, Setup, Permission List Preferences.**
Business Unit HR Defaults	**Define Business Rules, Define General Options, Setup, Business Unit HR Defaults.**
Record Groups	**PeopleTools, Utilities, Use, Record Group.**
TableSet Control	**PeopleTools, Utilities, Use, TableSet Control.**

The procedures for accessing and entering information in these tables are the same as those for updating any PeopleSoft table or page.

For more information and a quick refresher course, see the general tutorial in Using PeopleSoft 8 Applications.

Determining Your Business Unit Structure

Because PeopleSoft HRMS doesn't offer any predetermined definition for a Business Unit (as it does for Department and Company), you have a great deal of flexibility in deciding how 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 HRMS, Financials, Manufacturing, and Distribution applications, or define them within just one PeopleSoft application.

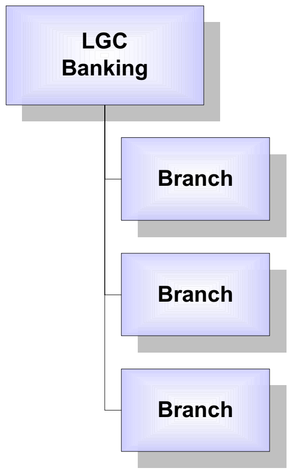
Your entire organization may have only one Business Unit, if every department uses the same processing rules. But multinational or otherwise diversified companies, such as those that separate multiple cost centers, divisions, or subsidiaries, will most likely have multiple Business Units.

Each Business Unit's HRMS control table data, such as Department Codes, Locations, Job Codes, Positions, Salary Plans and so forth, are stored on the TableSet Record Group Control Table, which is keyed by Business Unit. That way, the data from one Business Unit, although it exists in the same physical database table, is always segregated from that of other Business Units in the organization.

SetID segregates the data in the control tables. Therefore, many Business Units may be sharing the same set of data on the physical table in your human resources system.

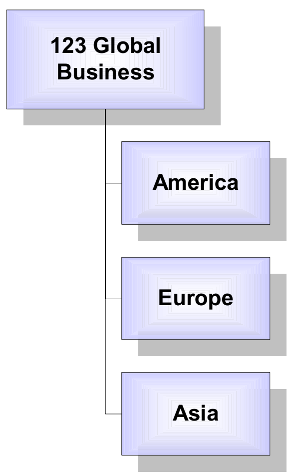
Defining a Business Unit

How you define a Business Unit depends on your industry, statutory requirements, regulatory reporting demands, or how you've organized operating responsibilities. For example, a bank might treat each branch as a Business Unit, which would mean that they could do reporting for their people within each group, by a branch or an office.



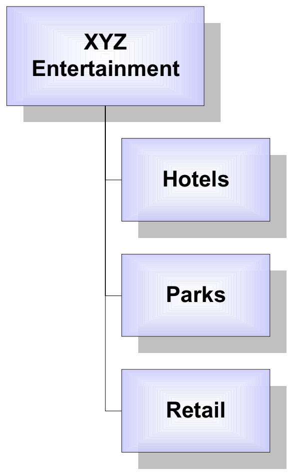
Identifying Business Units for a Bank

Another example might be an organization that's more global. Multinational companies might separate their 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 markets? They are then able to track their business requirements and needs accordingly.



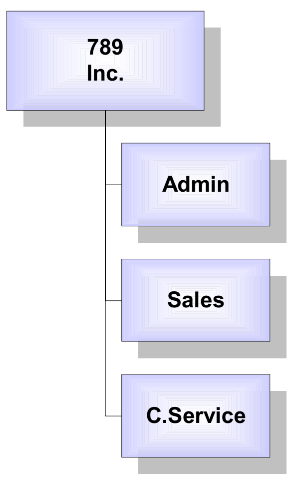
Identifying Business Units for a Global Organization

There are also organizations that may have some subsidiary companies. Highly diversified organizations might choose to define each subsidiary company or cost center as a Business Unit. They may have a hotel business as well as a retail business and want to keep this information separate, yet still be able to roll everything up into one database and maintain it in a single location.



Identifying Business Units for an Organization With Subsidiary Companies

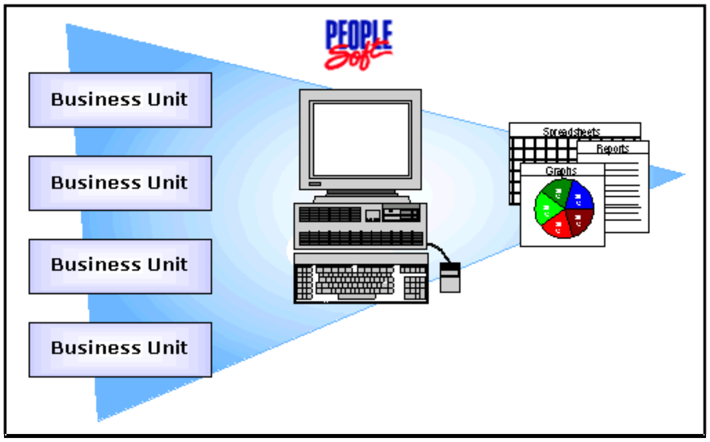
There may be organizations that want to organize information by functionality or purposes, such as what's going on in Sales versus in Customer Service. You may choose to create Business Units that reflect the administrative needs of your human resources, benefits, and payroll departments.



Identifying Business Units According to Functionality

You can also use a combination of all of these methods. Business Units don't necessarily have a restriction, 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. 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, which will interface with and manage each Business Unit's information, employees, and processes. Alternatively, you could set up one Business Unit for each company, location, or branch office in your enterprise, enabling them to manage their 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 still maintain a single, centralized database, reducing the effort of maintaining redundant information for each Business Unit. More importantly, you can produce reports across Business Units, enabling you to see the big picture and to compare and contrast the finest details.



Centralized Data Enables Analysis and Reporting Across Business Units

Deciding on a PeopleSoft HRMS 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 Business Units to best reflect your organizational structure, and to best use the exceptional power and capabilities of PeopleSoft HRMS.

To decide where to draw the lines between Business Units in your organization, you may have to balance a number of variables. It's a good idea to explore alternative possibilities. First, you might consider the question from one perspective, saying, "If I use these criteria, my business divides into these logical units." Then you might reconsider from another perspective, asking, "Is this structure going to hold up for other types of business decisions we often make?"

As you work toward the optimal Business Unit structure for your organization, keep in mind that in some circumstances you must set up multiple Business Units to use certain options. On the other hand, there are circumstances in which you may choose to have multiple Business Units, even though you don't need to: Setting up multiple Business Units in this situation is optional.

Establishing Business Units - Points to Consider

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 an employee to your company's organizational scheme.

- Business Units are always associated with an employee's Job and/or Position record.
- There is no predetermined definition for a Business Unit, as there are for Department and Company. You can implement this new organizational level as you determine its usefulness to your enterprise.
- A Business Unit isn't a legal entity, but a way of tracking specific business information for reporting and other roll-up data collection.

For more information about the systematic process for creating a Business Unit in PeopleSoft HRMS, see Business Units and TableSet Sharing.

Why Implement Multiple Business Units?

While you have the option to build only one blanket Business Unit for your entire organization, establishing multiple Business Units for your organization can offer you important reporting and data control options:

- Maintain a tree structure to facilitate organization-specific roll-up reporting.
- Distribute and administer certain Control Tables, such as the Department Table or the Location Table. For large or multinational companies, this feature of Business Unit functionality in PeopleSoft HRMS is extremely useful for controlling data flow across different parts of the enterprise.

If you implement PeopleSoft Benefits Administration, you can define eligibility rules that determine employees' benefits eligibility based on their Business Unit affiliation.

Questions to Ask Before You Implement

Every organization has different requirements, and it would be impossible to cover all the variables you might encounter as you define your Business Unit structures. But once you've mulled over the ideas we've outlined here, and after you've examined your organization's existing structures, make a tentative decision about how many Business Units you'll need. Then take a step back and ask the following questions:

- Is there any reason this wouldn't work?
- Will this preclude me from taking advantage of some functionality I might want to use?
- Will this restrict my reporting options?
- Will this cause me to process more than I want to on any given night?
- Is this just right?

You want to work closely with your PeopleSoft implementation partner early in your design to determine how best to define Business Units for your PeopleSoft HRMS system.

Understanding TableSets

TableSets enable you to share control table information and processing options among Business Units. For example, with TableSets, you can define a group of common job codes for several Business Units. The goal is to minimize redundant data and system maintenance tasks.

You need to define at least one complete set of these tables (TableSet) for your PeopleSoft HRMS system to function.

As you start to set up your control tables in the system, you'll notice that the SetID, or additional primary key, is what enables the sharing of control table information to take place across Business Units.

If you prefer, you can create a unique set of tables for each new Business Unit. Either way, TableSets form the building blocks of your system. You populate the individual tables in the TableSet according to your particular business rules.

You can also mix and match TableSets, by updating TableSet assignments for a Business Unit in the Utilities, TableSet Controls component.

For more information about using the TableSet Controls page in the context of setting up Business Unit/SetID functionality in PeopleSoft HRMS, see TableSet Control - Record Group Page, or, for a more general discussion, see Establishing Table Set Controls.

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 Controls pages in the Utilities menu to identify for each Business Unit which data should be shared and how it should be shared.

Understanding the Relationship between SetIDs and TableSets

SetIDs are simply the labels used to identify a TableSet. For example, with a SetID you could define departments 1, 2, and 3 in the Department Table and have another key that separates the data by saying that this is a US department 1 and a Canadian department. This enables us to have different high-level keys.

Dept ID	***Description***
00001	Branch Administration

00002	Canadian Sales
00002	U.S. Sales
00003	Customer Service
00004	Distribution
00005	Operations

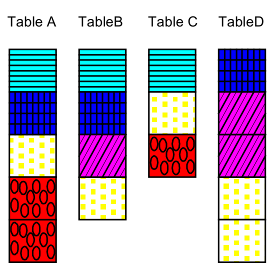
Multi-Part Key Includes the SetID

You may have as many SetIDs as you like, but the more you create, the more complex TableSet sharing becomes.

You need to create at least one SetID, even if you aren't taking advantage of TableSet sharing. Some organizations need only one SetID.

A TableSet is a group of rows across your control tables identified by the same SetID. In other words, all rows of data in your control tables keyed by the same SetID comprise a TableSet. When you want to look up U.S. information, key in the highest level key or SetID for the U.S. to automatically retrieve all the rows identified by that SetID.

For example, in the following diagram, each pattern represents a SetID, and all rows with the same pattern represent a TableSet. There are five TableSets in this diagram:



TableSet Diagram

The terms SetID and TableSet are sometimes used interchangeably. In many cases, this is correct, but it can cause some confusion. Remember that a SetID is the label for a TableSet, and a TableSet is a group of rows identified by the same SetID. You will always have the same number of SetIDs as you have TableSets.

Exploring the Purpose of TableSets

TableSets enable you to define multiple processing control structures, so that each of your companies or operating entities works in a way that truly reflects the way it does business. However, the greatest advantage of TableSets is that they enable you to share data among different Business Units.

To free you from entering redundant information, PeopleSoft HRMS enable you to share data among Business Units, while keeping this data separate and inviolable. Whether you're setting up PeopleSoft HRMS for a single location center or a multinational corporation, you'll find ways to increase flexibility and efficiency by sharing tables among Business Units. TableSets also helps you ensure consistency across Business Units.

When you add a Business Unit, you have two choices:

- Specify an existing TableSet to be used as a default.
- Create a completely new, unique TableSet for your new Business Unit. You would typically do this if you have only one Business Unit, or if you don't plan to share data.

For more information about how to associate a default TableSet with a Business Unit, see Business Unit - Business Unit Page.

How TableSet Sharing Affects Control Tables

The Business Unit/SetID feature enables businesses to administer their control table code values in PeopleSoft HRMS in either a decentralized or centralized manner. Organizations can point their Business Units to different sets of code values for each of the control tables in the PeopleSoft HRMS system, though the code values all reside on the same control table.

For example, if you're looking on the Job Code Table for an employee who is assigned to your CANADA Business Unit, you see Job Codes that are different from the ones you'd see if you'd assigned that employee to a company in the US Business Unit, even though all of the US and CANADA Job Codes reside on a single Job Code Table.

All searching for control table values in relation to a worker with Job Data is in the context of the Business Unit to which the worker is assigned in your HRMS system. When you hire an employee, you assign a Business Unit in the PeopleSoft Human Resources on the Hire, Work Location page.

For more information about hiring workers in PeopleSoft Human Resources, see Recruiting Your Workforce.

Sharing Centrally Maintained Data Across Your Enterprise

To free you from entering redundant information and to ease information maintenance, PeopleSoft HRMS applications enable you to share Control Table data among Business Units using TableSet Sharing. With TableSet sharing, you can specify the Control Table data that the system should use for each Business Unit.

If much of your Control Table data is the same from Business Unit to Business Unit, TableSet sharing enables you to share that information, instead of having to enter the same data multiple times.

Example: Using Business Unit/SetID to Control Information Flow

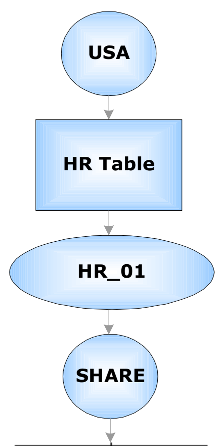
For example, your organization has ten Business Units with the same Job Codes. Simply enter the Job Code once and set up TableSet sharing.

TableSet sharing also enables you to deal with exceptions within your organization. For example, let's say that nine of your ten Business Units use the same Job Codes, but the tenth Business Unit uses entirely different Job Codes. You can still use TableSet sharing.

So how does this all happen? When a user selects the down arrow on a drop-down list box field, the list that appears contains all of the possible, valid entries that can be entered in that field.

The following series of questions outlines the online process that occurs in order for this to happen:

1. What business unit are we working in?
2. What table controls data for this field?
3. What record group is that table in?
4. What SetID is assigned to that record group for this business unit?
5. What rows in the control table are keyed by that SetID?



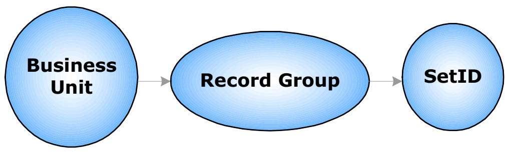
SetID	Dept.
SHARE	00001
SHARE	00002
USA	00002
SHARE	00003
USA	00003
SHARE	00004

TableSet Sharing Process

The rows identified by question 5 contain the data that is provided to the user as valid options in the drop-down list.

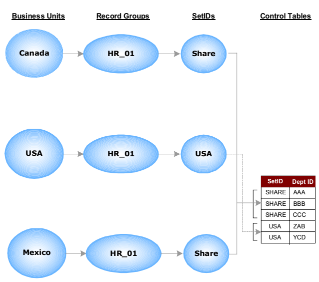
TableSet sharing is simply a time-saver, a way to share redundant information among Business Units. The key to sharing that information is defining what data is available under specific circumstances. To do this, you use SetIDs. TableSet sharing simply consists of assigning specific SetIDs to specific record groups for individual Business Units. A record group is simply a set of logically and functionally related control tables and views.

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 using the Record Group Table.



Assigning Specific SetIDs to Specific Record Groups

In questions 4 and 5 of our example, the data from the control tables that is valid in any given situation depends on the SetID that has been assigned to a specific record group for the Business Unit in which the user is currently working. Therefore, you can share information across Business Units by assigning the same SetID to the same record group for each individual Business Unit.



TableSet Sharing

As a result of its design, TableSet sharing can be extremely easy for an organization to design. In fact, it is almost entirely set up by the time you've finished creating your Business Units. Most of the setup happens behind the scenes and isn't obvious to the user. When you create a Business Unit, that Business Unit and a default SetID are automatically linked to each record group in the system you are using.

When TableSet Sharing Doesn't Help

There might be times when you want to share a limited amount of data among Business Units, while the rest of your data remains unique for each Business Unit. For example, three of your Job Codes might be the same for each Business Unit in your enterprise, but the rest of your Job Codes might be unique to each Business Unit. In this case, TableSet sharing won't be useful. It will be more time effective if you enter each Job Code into the Job Codes Table for each SetID.

Understanding Defaulting in Records Referencing Multiple SetIDs

Occasionally, some pages will have references to two different 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 different scenarios exist in PeopleSoft HRMS where a table keyed by one SetID also has fields prompting onto another SetID table:

Scenario 1: A Control Table with multiple SetIDs, but no defaulting based on those SetIDs.

For example, let's look at DEPT_TBL that has SETID in the key, along with the DEPTID (Department). It also contains a field called Location, which prompts from the LOCATION_TBL, another SetID table.

Department Table - Department Profile page

In a situation where there are two SetIDs for a prompt, which SetID should the system use when it displays prompt values for the Location field? The system can be set to display all SetIDs for the Location Table, or you can limit the choices. Showing all SetIDs (and hence all Location values) will often create situations where the Location that the user filling in the page selects won't be correct for a certain Business Unit when it is defaulted in at run-time. Consider the following example:

Business Unit	*Record Group*	*SetID*
PDEV	DEPT	USA
	LOCATION	USA
EURO	DEPT	EURO
	LOCATION	EURO
ASIA	DEPT	USA
	LOCATION	ASIA
RUSS	DEPT	EURO

Business Unit	Record Group	SetID
	LOCATION	RUSS

In this example, when a Department is part of SetID USA, there are two different SetID options for Location: USA and ASIA. If you allow the Locations in the DEPT_TBL field to be selected from any SetID, regardless of Department ID SetID, then Business Units, the Location that the system defaults into the page is invalid.

Because you can't predict what the Business Unit on the transaction table will be, you need to establish the group of SetIDs with which the Business Unit can be associated. The system won't default in invalid SetIDs on transaction tables. If the SetID is invalid, then no value is defaulted into the table.

Scenario 2: A Transaction Table, like the Job Data Record in the Administer Workforce, Use, Hire component, with multiple SetIDs controlling defaulting across the transaction record.

Let's look at the JOB_DATA Table that has a default Business Unit/SetID associated with the employee on the Work Location page. The default Business Unit here controls the prompt values that display when you select a Department on the Work Location page based on the SetIDs associated with that Business Unit on the TableSet Record Control page. The Department that you choose may or may not default in the Location, depending on whether the Location SetID is a valid SETID value for that Business Unit. In turn, the Salary Plan default on the Compensation page is controlled by the Location that you chose on the Work Location page. To understand how the defaulting across these different prompt tables in the Job Data record works, consider the following scenario.

First, you've defined the TableSet Record Control for these Business Units:

Business Unit	Record Group	SetID
PDEV	DEPT	USA
	LOCATION	USA
	SALARY	USA
EURO	DEPT	EURO
	LOCATION	EURO
	SALARY	CAN
ASIA	DEPT	USA
	LOCATION	ASIA
	SALARY	CAN
RUSS	DEPT	EURO
	LOCATION	RUSS
	SALARY	CAN

Next, you've set up the Department and Location Tables:

Department Table and Location Table With Default SetIDs

Given these TableSet Record Group Controls, Department Table, and Location Table definitions, when you hire an employee into PeopleSoft Human Resources using the Hire component, defaulting on the employee's Job Data record occurs according to the following scenario:

When you open the Hire, Work Location page, the employee's Business Unit defaults to PDEV based on your Primary Permission List Preferences. If you accept the Business Unit Default, when you select a Department, the system displays only those departments associated with SetID USA as defined on the TableSet Record Control Table.

You select Department 10100 USA (Department selected out of departments with SetID USA). When you move out of the Department field, one of two things can happen. The system first looks at the Department Table and finds the default location for Department 10100. It sees that the default Location SetID for the Department is USA. The system then references the TableSet Record Group Controls table.

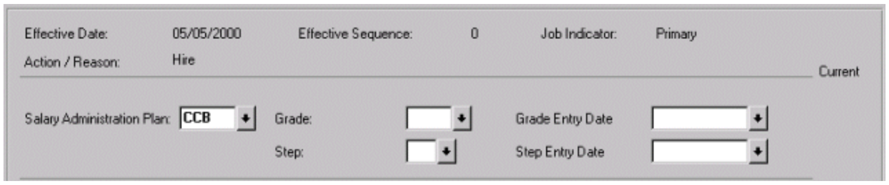
If USA isn't a valid SetID for the PDEV Location Record Group, then the system doesn't insert any default into the Location field on the Work Location page. When you prompt for valid Locations on the Location field, the system displays only those Locations that are associated with valid SetIDs for the PDEV Location Record Group on the TableSet Record Group Control table.

However, because USA is a valid SetID for the PDEV Location Record Group, the system inserts the default Location for Department 10100 USA as defined on the Location Table–in this case, Location 001, Corp (Corporate) HQ.

Department and Location Defaults Based on TableSet Record Group definition for PDEV

When you select a Location with a PDEV SetID and move out of the Location field or accept the Location default, the system finds the default Salary Plan SetID that you specified on the Location Table and defaults in the proper Salary Plan information on the Job Data, Compensation page. In this case, you've defined the default Salary Plan SetID as USA and the default Salary Plan as CCB on the Location Table, so the default Salary Plan on the Compensation page is CCB.

If USA isn't a valid SetID for the PDEV Salary Plan Record Group, then the system won't insert any default into the Salary Plan field on the Work Location page. When you prompt for valid Salary Plans on the Salary Plan field, the system displays only those Salary Plans that are associated with valid SetIDs for the PDEV Salary Plan Record Group on the TableSet Record Group Control table.

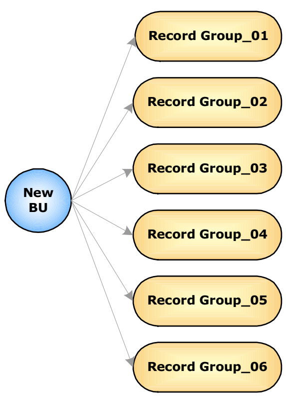


Default Salary Plan on Compensation Page Based on Location on Job Location Page

Business Units and TableSet Sharing

TableSet sharing is easy to design and is almost entirely set up by the time you've finished creating your Business Units. Most of this setup happens behind the scenes and isn't always obvious.

When you create a Business Unit, it is automatically linked to each record group in the system you are using. This is the beginning of TableSet sharing.



The Beginning of TableSet Sharing

For more information about the concepts and components involved in TableSet sharing, see TableSet Sharing and Record Groups.

TableSet Sharing and Record Groups

For the purpose of TableSet Sharing, the Control Tables used by PeopleSoft applications are divided into Record Groups, which serve two basic purposes:

- **Save you time.** With record groups, you can accomplish TableSet sharing without an enormous amount of redundant data entry.

- **Act as a Safety Net.** Record groups ensure that the TableSet sharing is applied consistently across all related tables and views in your system.

Implementing TableSet Sharing

Once you‘ve determined how many Business Units you need and how you want to organize them, you can create them for your PeopleSoft HRMS system and then implement TableSet sharing. To define TableSet Sharing for your organization, you’ll perform the following procedures:

To establish TableSet Sharing:

1. Define SetIDs for your organization.
2. Define Record Groups (you’ll add new record groups if necessary).
3. Set up Business Units to reflect your organization’s structure.
4. Update all of your TableSet Record Group Controls.

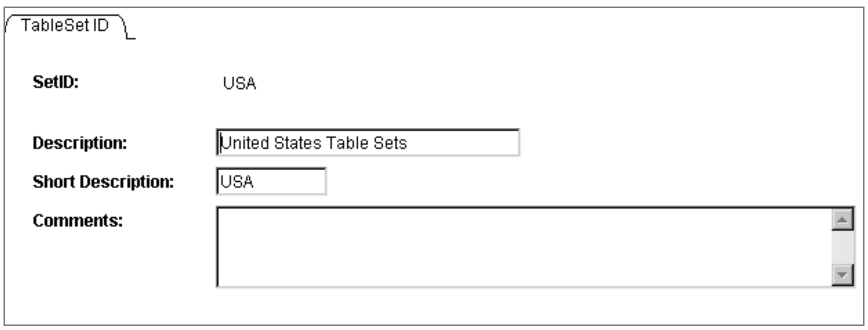
To link TableSet Sharing and System Defaults to Permission Lists and/or Business Units:

1. Set up Primary Permission List Preference Defaulting options (Required).
2. Set up all Business Unit HR Defaulting options (Optional).

TableSet ID Page

Usage	Use the TableSet ID Page to add or update SetIDs in your PeopleSoft HRMS system. You define SetIDs for the purpose of administering certain control tables, like the Department Table, in a decentralized way. When you define a SetID, think of how you’d want to categorize a subset of your control table data. If you want to use multiple SetIDs to set up TableSet sharing for the first Business Unit you create (before you’ve created any additional Business Units), create SetIDs in the TableSetID page prior to defining your Business Unit.
Object Name	SETID_TABLE
Navigation	• **PeopleSoft, nVision, nVision, Define Layout, Define Layout** • **PeopleSoft, nVision, nVision, Delete Report, Delete Report** • **PeopleSoft, nVision, nVision, Delete Scope, Delete Scope** • **PeopleSoft, nVision, nVision, Edit Report, Edit Report** • **PeopleSoft, nVision, nVision, Edit Scope, Edit Scope** • **PeopleSoft, nVision, nVision, Open Report, Open Report** • **PeopleSoft, nVision, nVision, Open Scope, Open Scope**

	• **PeopleSoft, nVision, nVision, Performance Options, SetID Table** • **PeopleSoft, nVision, nVision, Run Report, Run Report** • **PeopleSoft, nVision, nVision, Save Report, Save Report** • **PeopleSoft, nVision, nVision, Save Scope, Save Scope** • **PeopleSoft, Utilities, Use, TableSet ID, TableSet ID**
Prerequisites	None
Access Requirements	Enter a SetID.



TableSet ID page

Description — Enter a **Description** for this **SetID** to clearly identify the purpose of the table set. The **Descriptions** that you enter here appear throughout the system wherever you reference this **SetID**.

Short Description — Enter a **Short Description** for this **SetID**. The **Short Descriptions** that you enter here appear throughout the system wherever you reference this **SetID**.

Comments — You can also record **Comments** regarding this **SetID**. These could be explanatory remarks, any **Comments** concerning its purpose, who created it, and so forth. These **Comments** are for informational purposes only.

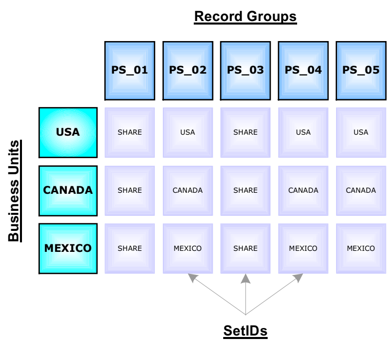
Creating Your SetIDs

You can create SetIDs independently, or as part of the Business Unit creation process using the TableSet ID page. When you add a new Business Unit to the system, the system automatically specifies a Default SetID on the Business Unit page that matches the name of the new Business Unit that you just added. If this Default SetID (with a name matching that of your new Business Unit) doesn't already exist, the system automatically creates a new SetID with a name that corresponds to your new Business Unit.

The system automatically creates a SetID with the same name as the Business Unit when you add a new Business Unit to the system, regardless of whether you choose to use the Business Unit name as your Default SetID.

If you want to use multiple SetIDs to set up TableSet sharing for the first Business Unit you create (before you've created any additional Business Units), you need to create SetIDs in the TableSetID page prior to defining your Business Unit.

We suggest that you create one SetID that doesn't match any of your Business Units to use to key information that is generic throughout your system. In our examples in this topic, we use the SetID SHARE to identify shared information. We suggest that the rest of your SetIDs match the Business Unit with which they will be used. This method helps eliminate confusion.



TableSet Sharing matrix

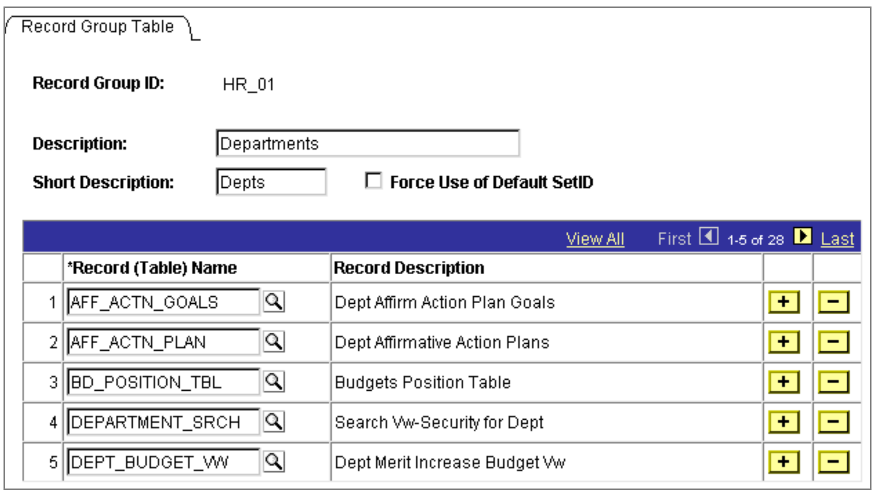
For more information about creating SetIDs, see PeopleTools Utilities. For more information about the use and purpose of SetIDs in PeopleSoft HRMS, see Understanding the Relationship between SetIDs and TableSets.

In order to optimize system performance, your SetIDs must be five characters. You will experience serious performance degradation if your SetIDs or Business Units have fewer than five characters.

Record Group Table Page

Usage	Record Groups are pre-defined for your PeopleSoft Human Resources system. All of the predefined Human Resources Record Groups have an HR prefix attached to their names. Predefined Record Groups for your PeopleSoft Payroll for North America system have a PY prefix attached to their names. Use the Record Group Table page to see which tables and views are included in each record group in your HRMS system. In the record group table, group together the record definitions for the

	tables you want to share, as well as any dependent record definitions. If you're adding a table to a PeopleSoft application, an appropriate record group may already be defined. But, if you're adding new functionality, you may need to add a new record group for the tables you're defining.
Object Name	REC_GROUP_TABLE
Navigation	**PeopleSoft, Utilities, Use, Record Group, Record Group Table**
Prerequisites	You must first define the Record (Table) Names of all of the records that will form part of the Record Group ID on the Record Group page. You must have also indicated whether you want to use a default SetID by selecting the **Force Use of Default SetID** check box on the TableSet Record Group Controls page.
Access Requirements	Enter a Record Group ID.



Record Group Table page

Record Group ID Enter a **Record Group ID** descriptive enough to encompass a category of related tables, not just the table you are specifically sharing.

Description Enter the **Description** for this record group. The **Descriptions** that you enter here display in pages and reports throughout your human resources system where you reference this **Record Group ID.**

Short Description Enter a **Short Description** for this record group. The **Short Descriptions** that you enter here display in pages and reports throughout your human resources system where you reference this **Record Group ID.**

Force Use of Default SetID Indicate if you want to **Force Use of Default SetID** by selecting this check box. Indicate the **Default SetID** on the TableSet Record Group Controls page.

For more information about how Force Use of Default SetID works, see TableSet Control - Record Group Page.

Record (Table) Name The system displays the **Record (Table) Name** of all of the records that are part of the **Record Group ID** you specified on the Record Group page.

Record Description The system displays the description of the associated **Record (Table) Name.**

When you add a new Record Group ID, the system automatically adds the new Record Group ID to all current Set Control Values (Business Units) defined on the TableSet Record Group Controls page. The default SetID for the new Record Group ID is based on the Default SetID for each Set Control Value as defined for that Set Control Value on the TableSet Record Group Controls page.

To add a Record Name:

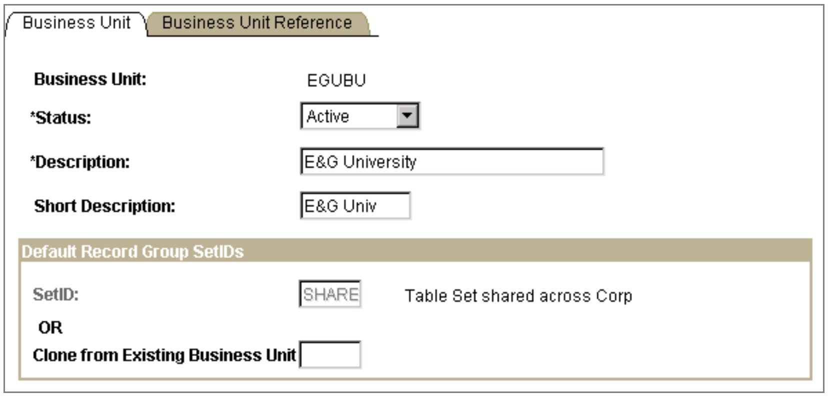
1. Add a new data row to the page.
2. Select a valid Record Name from the list of valid values.

A record group can contain a single table or many tables and views. Tables are most often identified by a _TBL extension and views by a _VW extension. We created Record Groups and assigned individual tables and views to specific groups to ensure accurate TableSet sharing within each functional area in PeopleSoft HRMS.

Business Unit - Business Unit Page

Usage	Use the Business Unit Table Page to add or update Business Units.
Object Name	BUS_UNIT_TBL_HR
Navigation	• **Define Business Rules, HRMS Tree Panels, Setup, HR Business Unit, Business Unit** • **Define Business Rules, Manage Human Resources (GBL), Setup, Business Unit, Business Unit** • **Define Business Rules, Manage Human Resources (USF), Setup, Business Unit, Business Unit**
Prerequisites	None

Access Requirements	Enter a Business Unit.



Business Unit - Business Unit page

In order to optimize system performance, your Business Units must be five characters. You will experience serious performance degradation if your SetIDs or Business Units have fewer than five characters.

Status

Indicate whether the **Business Unit** has an ***Active*** or ***Inactive*** **Status.** If you indicate that the Business Unit **Status** is ***Inactive,*** it won't appear in any Business Unit lists in PeopleSoft HRMS.

Note. Business Units aren't effective-dated, so use the Business Unit **Status** to implement or retire Business Units.

Description

Enter the **Description** for this **Business Unit.** The **Descriptions** that you enter here appear on pages and reports that reference this **Business Unit** throughout the system.

Short Description

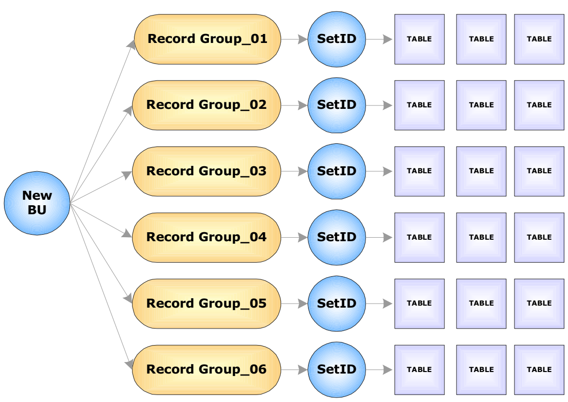
Enter the **Short Description** for this **Business Unit**. The **Short Descriptions** that you enter here appear on pages and reports that reference this Business Unit throughout the system.

Understanding Your TableSet Sharing Options

Default Record Group SetIDs

When you define a new Business Unit on the Business Unit Table, you can specify that the system establish default record group **SetIDs** for the new Business Unit using the **Default Record Group SetIDs** options. The **SetID** or the **Clone from Existing Business Unit** value that you enter determines your preliminary TableSet sharing setup for the new Business Unit by determining the SetIDs assigned to each record group for the new Business Unit. The **SetID** assigned to a record group determines which TableSet is used as valid values for that specific Business Unit.

Default Record Group SetID Options on the Business Unit Table



TableSet Sharing

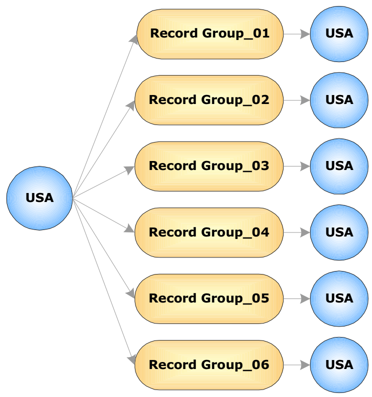
Establishing a TableSet Sharing Setup Using One Default SetID

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 Record Group Control page, simply enter the default SetID that you want to use.

When you're adding a new Business Unit to the system, the system will automatically populate the SetID 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 will default to USA. You can override the default SetID as necessary.

You can associate only one default SetID with a Business Unit.

When you save the Business Unit, the system creates a new SetID with the same name as the Business Unit, and the default SetID that you specified on the Business Unit page is assigned to each record group for the new Business Unit.



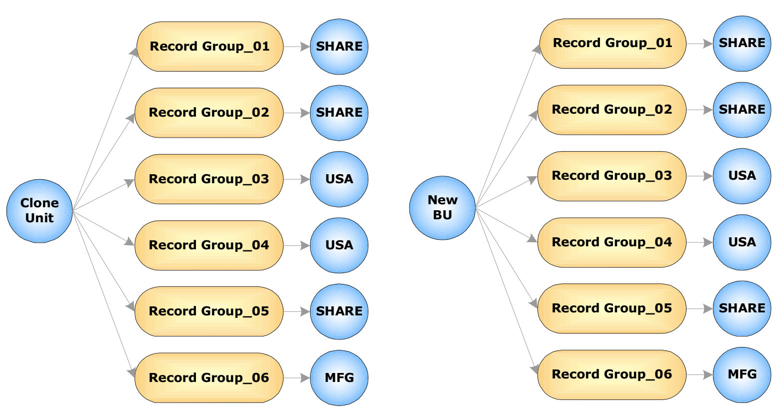
TableSet Sharing Using a Default SetID

Cloning TableSet Setup From Existing Business Units

With the **Clone from Existing Business Unit** feature, you can clone the TableSet sharing setup of an existing Business Unit.

When you first enter the Business Unit page, the Clone from Existing Business Unit option is clear. To activate the option, clear any SetID values from the SetID field, and move out of the field.

If you want the TableSet sharing for the new Business Unit 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, simply enter the Business Unit that you want to mirror as the Clone Unit. When the record groups are linked to the new Business Unit, the system assigns (defaults in) each record group the same SetID that is used for the record group by the Business Unit you selected as the Clone Unit.



Cloning the TableSet Sharing Setup From an Existing Business Unit

Whichever method you select, when you save the new Business Unit for the first time, the system makes the default SetID or Clone Unit unavailable for entry. You can't change the Default Record Group SetID information 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.

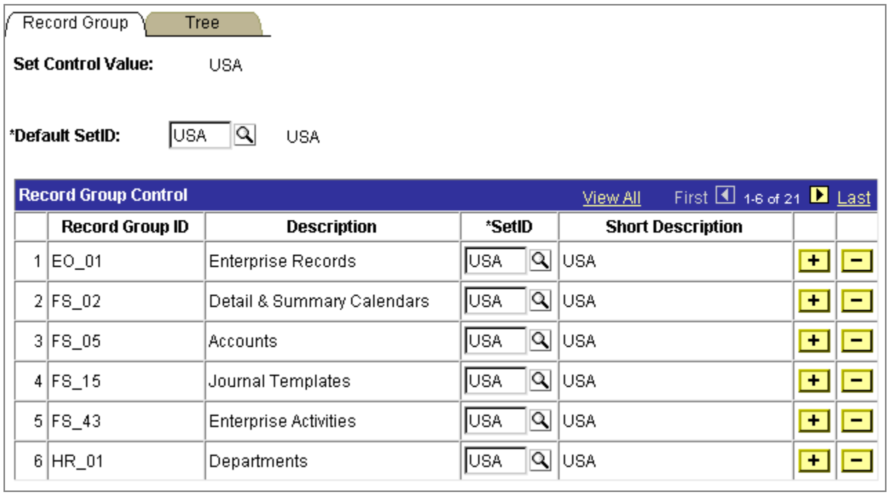
When you add a new Business Unit and save the page, the system creates all of the appropriate table values provided by PeopleTools that connect the Business Unit ID, the Record Group ID, and the SetID.

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 Record Group Controls page. The default SetID on the TableSet Record Group Control page is used by the system when you add in any additional record groups.

For more information on reviewing or modifying your TableSet Sharing Setup, see TableSet Control - Record Group Page.

TableSet Control - Record Group Page

Usage	Use the Record Group page to fine-tune your TableSet sharing.
Object Name	SET_CNTRL_TABLE1
Navigation	**PeopleSoft, Utilities, Use, TableSet Control, Record Group**
Prerequisites	You associate record groups with SetIDs using the Record Group Table page. To update or modify the list of Record Group IDs displayed on this page, you must update the record groups linked to a SetID on the Record Group Table page. The system displays all of the Record Group IDs and their descriptions in the **Default Record Group Controls** group box for the Business Unit or SetID that you selected as the Set Control Value when you opened the TableSet Record Group Controls page.
Access Requirements	Enter the Set Control Value (Business Unit or SetID) for which you want to adjust TableSet sharing.



TableSet Control - Record Group page

Default SetID Select the **Default SetID** for this **Set Control**. This is the **Set ID** the system will use as you add additional record definition groups to be shared within this table set. If you've indicated that the system should **Force Use of Default SetID** for one of the Record Groups in the list for this **Set Control** on the Record Group Table page, then you won't be able to override the default **SetID** for the record group with a **SetID** that is different from the **Default Set ID** you indicate here. The **SetID** for that **Record Group ID** will be unavailable for entry.

Remember that most record groups contain a number of tables and views. The SetID that you assign to that record group *must* represent the information that you want to use from each of the Control Tables contained in that Record Group.

Record Group Controls

Record Group ID The system displays all of the **Record Group IDs** and their descriptions in the **Default Record Group Controls** group box for the Business Unit or SetID that you selected as the Set Control Value when you opened the TableSet Record Group Controls page.

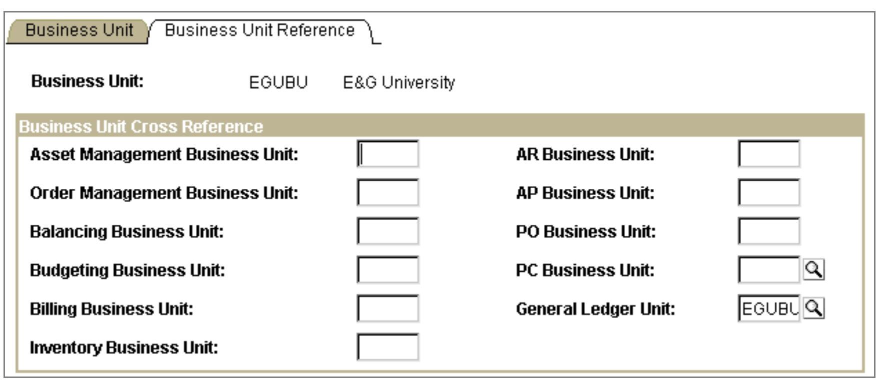
SetID For each **Record Group**, enter the **Set ID** you want to use. You may have multiple record groups that you assign default **Set ID** or unique **Set IDs**.

You associate record groups with SetIDs using the Record Group Table page. To update or modify the list of Record Group IDs displayed on this page, update the record groups linked to a SetID on the Record Group Table page.

Otherwise, make any changes necessary to the **SetID** for each record group displayed here.

Business Unit - Business Unit Reference Page

Usage	Use the Business Unit Reference Page to identify Business Units in other PeopleSoft applications that relate to a Business Unit.
Object Name	BUS_UNIT_TBL_HR2
Navigation	• **Define Business Rules, HRMS Tree Panels, Setup, HR Business Unit, Business Unit Reference** • **Define Business Rules, Manage Human Resources (GBL), Setup, Business Unit, Business Unit Reference** • **Define Business Rules, Manage Human Resources (USF), Setup, Business Unit, Business Unit Reference**
Prerequisites	None
Access Requirements	Enter a Business Unit.



Business Unit - Business Unit Reference page

Business Unit Cross Reference

Indicate the **Business Unit Cross Reference,** if applicable, for any of the PeopleSoft applications listed on the page. You identify other Business Units in other PeopleSoft applications that relate to your Business Unit.

Asset Management Business Unit Enter the **Asset Management Business Unit** that is associated with this HRMS **Business Unit**, if applicable.

Order Management Business Unit	Enter the **Order Management Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
Balancing Business Unit	Enter the **Balancing Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
Budgeting Business Unit	Enter the **Budgeting Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
Billing Business Unit	Enter the **Billing Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
Inventory Business Unit	Enter the **Inventory Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
AR Business Unit	Enter the **AR Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
AP Business Unit	Enter the **AP Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
PO Business Unit	Enter the **PO Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
PC Business Unit	Enter the **PC Business Unit** that is associated with this HRMS **Business Unit**, if applicable.
General Ledger Unit	Enter the **General Ledger Unit** that is associated with this HRMS **Business Unit**, if applicable. You can review which **General Ledger Units** are associated with HRMS **Business Units** on the GLBusUnit/HRBusUnit Mapping page. The HR Commitment Accounting feature uses business unit mapping information when processing actuals and encumbrances transactions.

Linking System Defaults to Business Units

Once you've defined Business Units and established your TableSet Sharing structure, you can associate them with Business Units and Permission Lists in your PeopleSoft HRMS system. When a user signs on to the system, defaults and control values throughout PeopleSoft HRMS will be based on the defaults that you establish for that user's Permission List on the Primary Permission Lists Table. You can do the following:

- Specify unique default SetID and Business Unit information, along with other fields, such as Company, Country, Standard Hours, and so forth, for each Permission List.
- Easily control which default values will be placed automatically into the defined fields throughout PeopleSoft HRMS, based on the Permission List that users are associated with (at the User ID level).

- Share default values among your organization's Business Units. The table is keyed by Permission List to enable this kind of sharing.

You can also link specific defaults to a Business Unit SetID, so that when a user selects a Business Unit on tables and pages throughout PeopleSoft Human Resources, defaults for country and currency, to name just a couple of options, fill into the pages automatically, based on the defaults that you establish on the Business Unit HR Defaults table.

Important! While you must set up the Primary Permission List Preferences table for your Primary Permission Lists in PeopleSoft Human Resources, setting up the Business Unit HR Defaults table is optional.

For more information on how these tables control defaulting in PeopleSoft Human Resources, see Understanding How the System Determines Default Values.

Before you can link default values to specific Permission Lists, you need to define Permission Lists in PeopleSoft HRMS.

For more information and general knowledge about setting up and using permission lists for PeopleSoft applications, see Working with Permission Lists. For more information about setting up and using permission lists specifically for PeopleSoft HRMS applications, see Administering Security.

Why Define Business Unit HR Defaults?

The first time you go into a system page, with or without a Business Unit associated with it, field level defaults on the page are loaded from the defaults that you set up for Company, Country, To Currency, and so forth, on the Primary Permission Lists Table. They are based on the Permission List to which the user belongs (at the User ID level). The only time that the default settings on the Business Unit Options Default page come into play in determining field level defaults (if you've set up Business Unit HR Defaults at all) occurs when you enter a Business Unit on a page and move out of the field. When you do so, the system finds the Business Unit (Set Control Value) on the TableSet Record Group Controls table, checks what controlling SETID is described for the Business Unit Defaults Record Group (HR_06), goes to the default SetID on the Business Unit HR Defaults table, finds any defaults that you specified there, and populates the system page accordingly.

Setting up Business Unit defaulting on the Business Unit HR Defaults table makes sense when you have multiple Business Units that share the same kind of defaulting; but this shared defaulting isn't readily organized by Permission List. If this is the case, you can predetermine system defaulting for the fields for which you can specify defaults on the Business Unit HR Default table.

Understanding the Difference Between Permission List and Business Unit Defaulting

The majority of page-level defaulting in the PeopleSoft HRMS system is based on Permission List as opposed to Business Unit. Business Unit-based defaulting in PeopleSoft HRMS works as follows:

1. The system retrieves the SetID for that Business Unit as defined in the HR_06 record group.
2. Once the system has the SetID for a Business Unit, because the Business Unit HR Defaults table is keyed by SetID, the system can retrieve the correct data row of default values for that Business Unit.

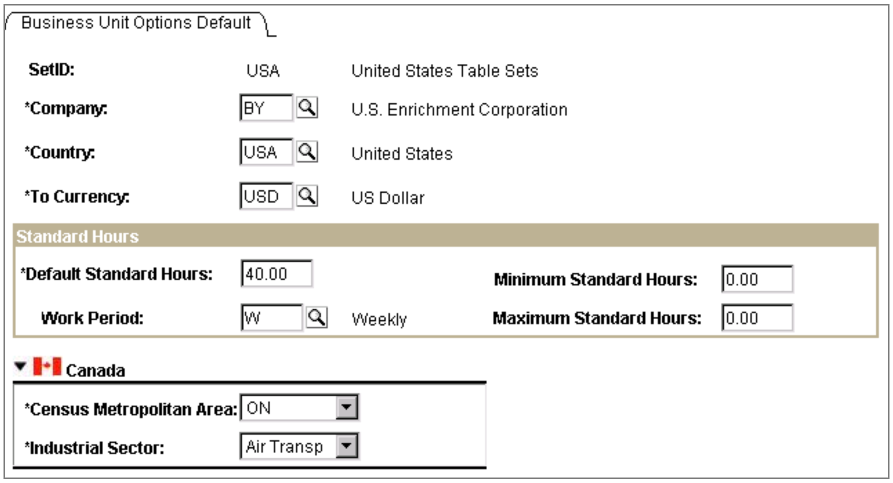
In this way, many Business Units can share the same default values.

Permission List-based defaulting, on the other hand, has one set of defaults for one Permission List. The Default SetID and Business Unit for a Permission List are normally used to default in values into the relevant fields–Business Unit and SetID, for example–on pages and dialog boxes throughout your system.

Not associating system users with Permission Lists can result in serious data errors in PeopleSoft Human Resources.

Business Unit Options Default Page

Usage	Use the Business Unit Options Default page, which works much like the Installation Table, to set system defaults such as Company, Country, and Currency for a specific SetID. By setting up default values for a SetID, you can specify the values that default into these fields in your human resources system. Because the SetID keys the Business Unit HR Default Table, you can share these defaults among multiple Business Units.
Object Name	BUS_UNIT_OPT_HR
Navigation	**Define Business Rules, Define General Options, Setup, Business Unit HR Defaults, Business Unit Options Default**
Prerequisites	None
Access Requirements	Enter a SetID.



Business Unit Options Default page

The values that you indicate here affect defaulting throughout your PeopleSoft HRMS system.

For more information about how Business Units and SetIDs affect the HRMS system, see Understanding TableSets.

Company Enter the default **Company** for this SetID. This field is required.

Country Enter the default **Country** for this SetID. This field is required.

For more information on how Country Code defaults affect your human resources system, see PeopleSoft 8 Application Fundamentals for HRMS, “Setting Up Control Tables”

To Currency Select a **To Currency** that will act as the default value for this SetID in PeopleSoft HRMS. **To Currency** is a required field.

For more information on how Currency defaults affect your HRMS system, see Installation Table - HRMS Options Page.

For more information about currency capabilities and options in PeopleSoft HRMS, see Working with Currencies.

Standard Hours

Default Standard Hours

The **Default Standard Hours** is ***40*** hours. The values you enter here affect how the human resources system calculates FTE (Full Time Equivalency) for workers, and affects compensation processing.

Work Period

Select a standard work period. The standard Work Period is the time period in which employees must complete the Standard Hours. Valid 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 (full-time equivalency).

For more information about how Standard Hours effect your Human Resources system and affect FTE calculations for workers, see PeopleSoft 8 Application Fundamentals for HRMS, "Setting Up Control Tables" For more information about Standard **Work Period** defaulting, see PeopleSoft 8 Application Fundamentals for HRMS, "Setting Up Control Tables"

Minimum Standard Hours

Enter the default **Minimum Standard Hours** value for this SetID. The value you enter here affects how the human resources system calculates FTE (Full Time Equivalency) for workers, and affects compensation processing.

Maximum Standard Hours

Enter the default **Maximum Standard Hours** values for this SetID. The **Standard Hours Default** is ***40*** hours. The values you enter here affect how the human resources system calculates FTE (Full Time Equivalency) for workers, and affects compensation processing.

Canada

Census Metropolitan Area

Select a Canadian **Census Metropolitan Area** from among the Metropolitan areas defined on the Translate Table.

Industrial Sector	Select the **Industrial Sector** from the list of valid values stored on the Translate Table. These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

For more information about regulatory reporting options for Canada in PeopleSoft Human Resources, see Meeting Regulatory Requirements, "Meeting Canadian Reporting Requirements"

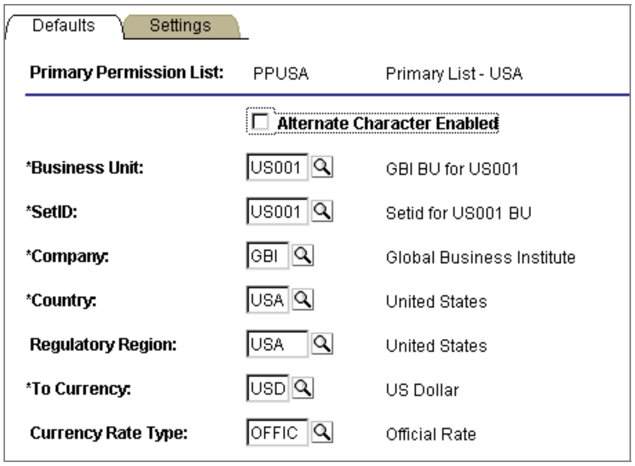
Setting Up Primary Permission List Preferences

You use the Primary Permission List Table to set predefined TableSet Sharing and system-wide defaults and settings for each of your primary permission lists. The system will default in the values you indicate for a particular permission list on the Primary Permission List Preferences Table, such as Business Unit, SetID, Currency, Country, and/or Company Code when a user associated with that permission list logs in to PeopleSoft HRMS.

For more information about setting up and using permission lists for PeopleSoft applications, see Working with Permission Lists. For more information about using permission lists with PeopleSoft HRMS applications, see Administering Security.

Primary Permission List Preferences - Defaults Page

Usage	Use the Primary Permission List Preferences – Defaults page to set predefined TableSet Sharing and system-wide defaults for each of your primary permission lists. You can tailor your PeopleSoft HRMS system for each of your users, controlling the default values that users see on pages in the system.
Object Name	OPR_DEF_TBL_HR
Navigation	**Define Business Rules, Define General Options, Setup, Primary PrmList Preferences, Defaults**
Prerequisites	None
Access Requirements	Enter a Primary Permission List.



Primary Permission List Preferences –Defaults page

The TableSet Record Group Control table regulates what users see on prompt tables in PeopleSoft HRMS.

These defaults override the defaults you set for these options on the Installation Table for this Permission List.

For more information about working with Permission Lists in PeopleSoft applications, see Understanding PeopleSoft Security.

Alternate Character Enabled

Select the **Alternate Character Enabled** check box to indicate if you want **Alternate Character** searching **Enabled** for this Permission List.

For more information on setting up and using Alternate Character searching in PeopleSoft Human Resources, see PeopleSoft 8 Application Fundamentals for HRMS, “Working With Languages”

Business Unit

Indicate the default **Business Unit** for this Permission List from among the list of valid Business Units stored on the Business Unit Table.

For more information about how Business Units affect the HRMS system, see Understanding TableSets.

SetID

Indicate the default **SetID** for this Permission List from among the list of valid SetIDs stored on the TableSetID Table.

Warning! The values that you indicate here affect Business Unit and SetID defaults for this Permission List throughout your PeopleSoft HRMS system.

For more information about how SetIDs affect the HRMS system, see Understanding TableSets.

Company

Enter the default **Company** for this Permission List.

Country

Enter the default **Country** for this Permission List.

For more information on how Country Code defaults affect your human resources system, see PeopleSoft 8 Application Fundamentals for HRMS, “Setting Up Control Tables”

Regulatory Region

Select a valid **Regulatory Region** from among the Regulatory Regions on the Regulatory Region Table.

For more information on the uses and purpose of Regulatory Regions in PeopleSoft HRMS, and for information on setting up and defining Regulatory Regions, see PeopleSoft 8 Application Fundamentals for HRMS, “Processing Transactions Using Regulatory Regions”.

To Currency

Select a **To Currency** to act as default values for this Permission List in PeopleSoft HRMS.

Currency Rate Type

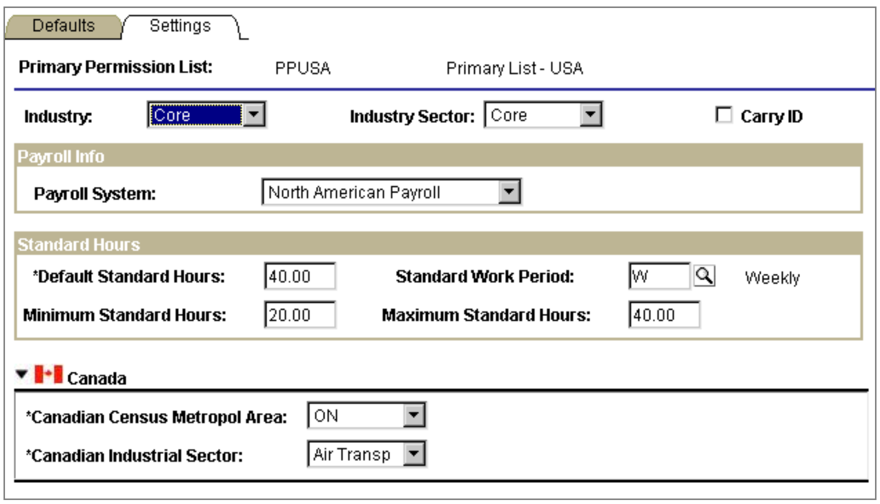
Select a **Currency Rate Type** to act as default values for this Permission List in PeopleSoft HRMS.

For more information about currency capabilities and options in PeopleSoft HRMS, see PeopleSoft 8 Application Fundamentals for HRMS, “Working with Currencies”

Primary Permission List Preferences - Settings Page

Usage	Use the Primary Permission List Preferences – Settings page to set the

	Payroll System and system-wide default settings for each of your Permission Lists. Using the Primary Permission List Preferences – Settings page, you can tailor your PeopleSoft HRMS system for each of your permission lists, thus controlling the default values that users see on pages in the system.
Object Name	OPR_DEF_TBL_HR2
Navigation	**Define Business Rules, Define General Options, Setup, Primary PrmList Preferences, Settings**
Prerequisites	Settings is the second page in the Primary Permission List Preferences component. You must first enter data on the Primary Permission List Preferences – Defaults page.
Access Requirements	Enter a Permission List.



Primary Permission List Preferences –Settings page

Industry Select the **Industry** for this Permission List. Select ***Government*** to indicate that this is a US Federal Government database. The default value is ***Core.***

Industry Sector Select the **Industry Sector** for this Permission List. Select ***US Federal*** to indicate that this is a US Federal Government database. The default value is ***Core.***

You must select an **Industry** of ***Government*** and an **Industry Sector** of ***US Federal*** to fully utilize US Federal Government functionality in your database. In addition, you will need to select **Federal** on the Installation Table – Products page.

For more information about the Installation Table, see Setting Up Implementation Defaults.

Specifying a Default Payroll System

Payroll System

Indicate the default **Payroll System** for this Permission List. Whenever you have to select a Payroll system on a table or page in PeopleSoft HRMS, the system defaults in ***North American, European,*** or neither, based on the choice you enter here for this Permission List. The user can override this default, as necessary.

For more information on PeopleSoft Payroll for North America or PeopleSoft Global Payroll, see the documentation appropriate to your payroll system implementation. Or, consult your account manager for more details.

Setting Default Standard Hours

Default Standard Hours

The Standard Hour **Default** is ***40*** hours. The values you enter here affect 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 employees must complete the Standard Hours. Valid 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 (full-time equivalency).

For more information about how Standard Hours effect your Human Resources system and affect FTE calculations for workers, see PeopleSoft 8 Application Fundamentals for HRMS, “Setting Up Control Tables” For more information about Standard **Work Period** defaulting, see PeopleSoft 8 Application Fundamentals for HRMS, “Setting Up Control Tables”

Minimum Standard Hours	Enter the default **Minimum Standard Hours** value for this Permission List. The Standard Hour **Default** is ***40*** hours. The values you enter here affect how the human resources system calculates FTE (Full Time Equivalency) for workers, and affects compensation processing.
Maximum Standard Hours	Enter the default **Maximum Standard Hours** value for this Permission List. The Standard Hour **Default** is ***40*** hours. The values you enter here affect how the human resources system calculates FTE (Full Time Equivalency) for workers, and affects compensation processing.

For more information on how Standard Hours effect your Human Resources system and affect FTE calculations for workers, see PeopleSoft 8 Application Fundamentals for HRMS, "Setting Up Control Tables"

Entering Canadian Default Information

Canadian Census Metropol Area	Select a **Canadian Census Metropol** (Metropolitan) **Area** from among the Metro areas defined on the Translate Table.
Canadian Industrial Sector	Select the **Canadian Industrial Sector** from the list of available options.

These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

For more information on regulatory reporting options for Canada in PeopleSoft Human Resources, see Meeting Canadian Reporting Requirements.

Understanding How the System Determines Default Values

To see generally how the system checks for default values, based on the information that you've defined on the Business Unit Options Default page and the Primary Permission List Preferences pages, refer to the following table:

Situation on the page	***How the system determines defaults:***
If a Business Unit value is on the page	When you enter a Business Unit on the page and move out of the field, the system looks at the TableSet Record Group Control table, finds HR_06 Business Unit Defaults, and takes the SetID for Business Unit HR Defaults (BUS_UNIT_OPT_HR), and defaults the values specified there.
If an EmplID value is on the page (No Business Unit)	The system determines what the EmplIDs Business Unit is by checking the employee's JOB record and then defaults values in based on the Business Unit HR Default Table (BUS_UNIT_OPT_HR).
If no Business Unit and no EmplID is on the page	Default values are based on defaults from the Primary Permission List Preferences Table (OPR_DEF_TBL_HR).
If SetID is on the page without Business Unit and EmplID values. (This is the case on most setup and control tables, such as Location and Department.)	Default values are based on defaults from the Primary Permission List Preferences Table (OPR_DEF_TBL_HR).

The above paradigm 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.

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

Human Resources Tables Affected by TableSet Sharing

The following section outlines specific control tables and business process records in PeopleSoft Human Resources that are driven by Business Unit functionality and details how Business Unit/SetID affects the Job Record for employees. This section doesn't attempt to be exhaustive, but offers a representative list of affected records in the human resources system.

Control Tables

SetID is a high-level key, and TableSet sharing is driven by the Business Unit, for the following Human Resources Control Tables:

- Department Table

- Location Table
- Job Code Table
- Job Task Table
- Job Requirements Table
- Business Unit HR Defaults
- Plan Salaries
- Absence Types
- Health & Safety
- Contract Type

Both Absence Types and Health & Safety control tables are driven by Regulatory Region, which in this instance acts as a SetID value.

For more information on Regulatory Regions in PeopleSoft Human Resources, see Processing Transactions Using Regulatory Regions.

Business Unit Process Tables

Business Unit and SetID functionality also affects these tables, among others, in the Administer Workforce, Manage Positions, Monitor Absences, Monitor Health & Safety, and Plan Salaries business processes in PeopleSoft Human Resources:

- Job
- Job Earning Distribution
- Position Data
- Absence Type
- Health & Safety Tables
- Salary Plan Tables
- Contract Data

Both Absence Types and Health & Safety control tables are driven by Regulatory Region, which in this instance acts as a SetID value.

For more information on Regulatory Regions in PeopleSoft Human Resources, see Processing Transactions Using Regulatory Regions.

Understanding How Business Unit Affects Job Records

A job record for an employee in PeopleSoft Human Resources can belong to only one Business Unit. Each Employment Record Number can belong to only one Business Unit.

Because a worker can fill more than one job in an organization, there might be multiple job records for that employee that are attached to different Business Units. For example, if you're using the Multiple Concurrent Jobs feature, an employee of a university could be both a professor (Job Code 10100 UNI) and a dean (Job Code 10100 ADMIN). Thus, the employee is simultaneously in two different job codes in two different Business Units (UNI and ADMIN). The only requirement is that the concurrent jobs be in different Employment Record Numbers.

Organizations can point their Business Units to different sets of codes for each of these control tables. All prompting for these codes in relation to a worker with Job Data is controlled by the worker's Business Unit.

C H A P T E R 2

Processing Transactions Using Regulatory Regions

In this section, we discuss the Regulatory Region concept and how to set up Regulatory Regions in your PeopleSoft Human Resources system so that your operators can quickly access the data and codes they need. We also explain how to set up additional Regulatory Regions, if necessary.

What is a Regulatory Region?

The Regulatory Region functionality in PeopleSoft Human Resources is designed 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 operator sees.

A Regulatory Region can be any region where there are specific laws and regulations addressed by functionality in PeopleSoft Human Resources. There are many country-specific transactions 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 per transaction.

When your system operators are entering data in your PeopleSoft Human Resources system, you want them to see and use the codes and data that are applicable to the specific Regulatory Region with which they are working. Using the Regulatory Region feature helps you ensure that your operators can 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 will 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 operators work with incident data and codes–body parts, dangerous occurrences, diagnosis codes, and so forth–in the system which are applicable to the country in which the incident occurred.

- Your organization has implemented PeopleSoft Benefits Administration and would like to use its automatic eligibility processing capabilities to determine benefits enrollment options for your U.S. and Canadian employees. Because benefits rules in Canada and the United States vary widely, 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 employees and another set for your U.S. employees.

For more information on using PeopleSoft Benefit Administration's Eligibility Rules Table to define eligibility rules using Regulatory Region as an eligibility requirement, see Defining Eligibility Rules.

Before You Begin

The procedures for accessing and entering information in these pages mirror those for updating any PeopleSoft table or page.

For more information and a quick refresher course, see Using PeopleSoft 8 Applications.

In order to define additional Regulatory Regions for your PeopleSoft Human Resources system and apply PeopleCode Transaction edits to Regulatory Regions, you should be familiar with both PeopleCode and the PeopleTools Application Designer.

For more information on using these PeopleSoft development tools, see PeopleCode Developer's Guide and PeopleSoft Application Designer.

Understanding Regulatory Region Table Relationships

Use these tables to review and set up Regulatory Region controls for your system:

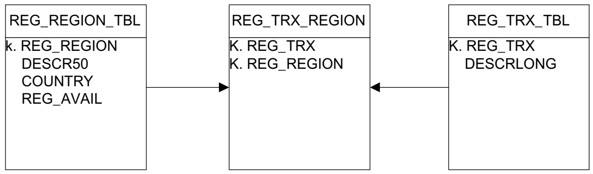
- Regulatory Region
- Transaction
- Regions in Transaction

Use the Regulatory Region page to view or modify existing Regulatory Regions and to establish additional Regulatory Regions. The Regulatory Regions you create could be based upon 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 which define existing regulatory transaction types and establish the regions that define new transaction types that you create, if you so choose.

The following diagram illustrates the relationships between the Regulatory Region Tables that you use to define and administer Regulatory Regions in PeopleSoft Human Resources:



Regulatory Region Table Relationships

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

During configuration, you must create Regulatory Regions before you can create Transactions and establish the relationship between them. A Regulatory Region may be used by many transactions.

Setting Up Regulatory Regions

We've already defined Regulatory Regions for Belgium, Canada, France, Germany, Japan, the Netherlands, the United Kingdom, the United States, and the Canadian provinces that you can use when you implement your PeopleSoft Human Resources system. Using the pages discussed in this section, you can set up additional Regulatory Regions and regulatory transaction types, if necessary. You can modify the Regulatory Regions that we've defined as templates to meet your organization's unique business process needs.

Although the scope of a Regulatory Region can be smaller than a country, we recommend that the Standard Regulatory Region be at the country level.

Enterprise Integration Point (EIP) Related to the Regulatory Region Page

The Regulatory Region Table EIP message contains the Regulatory Region Setup Table. A regulatory region can be any region where the are specific laws and regulations addressed by functionality in PeopleSoft Human Resources.

When you add, delete, or change regulatory region information in the PS_REG_REGION_TBL record (of the Regulatory Region page), the system automatically publishes the Regulatory Region Table EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the PS_REG_REGION_TBL record on the Regulatory Region page.

For more information regarding the subscribers and technical details of the Regulatory Region Table EIP, see Regulatory Region Table. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

Establishing Regulatory Regions

While we've already defined Regulatory Regions in the system, you might want to add new Regulatory Regions if there are additional countries where you have operations. Or, you might want to create additional Regulatory Regions corresponding 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 of the states within 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.

You don't have to create new Regulatory Regions. You only create new Regulatory Regions 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 only have operations in a single country, and want to limit the impact of Regulatory Region on your data entry operators, then you can assign your single region as the default region in Primary Permission List Preferences.

Regulatory Region is used as a control field in components throughout the system, such as Primary Permission List Preferences, Establishment Table, Accommodation Data, Job Data, Position Data, Applicant Hire, and Incident Details.

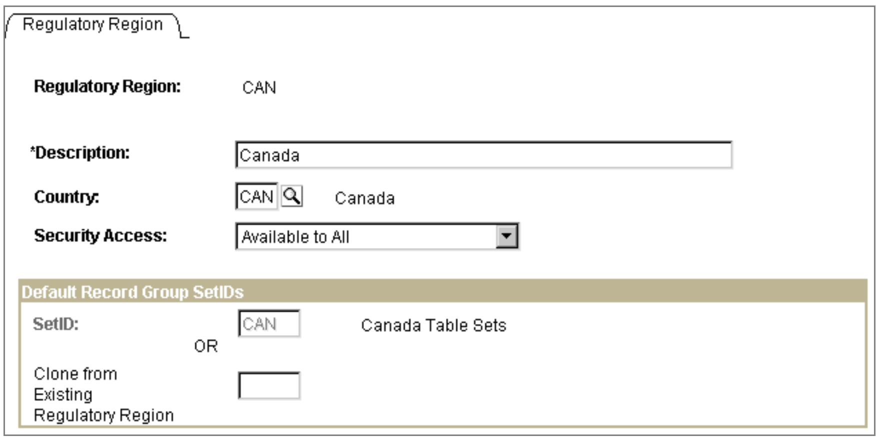
For more information and a discussion about how and where Regulatory Region is used in the system, see Associating Regulatory Region With a Transaction.

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 three-character ISO-certified Country Code found in the Country Table.
- For regions smaller than a country, use the three-character country code and concatenate a two-character unique regional identifier. For example, use "CCCSS" for state or province level regions, where CCC is the Country Code and SS is State/Province code. Using this system, the Regulatory Region code for Canada - British Columbia is CANBC.

Regulatory Region Page

Usage	Use the Regulatory Region page to set up regulatory regions.
Object Name	REG_REGION
Navigation	**Define Business Rules, Administer HR System, Setup, Regulatory Region, Regulatory Region**
Prerequisites	None.
Access Requirements	Enter a Regulatory Region.



Regulatory Region page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description** and **SetID.**

Country Select a **Country** from the list of valid values and continue through the field. When you create a Regulatory Region, you must indicate the **Country** to which the region belongs. Specifying the **Country** enables country-specific edits even when a state/provincial level region is used in a system transaction. The countries in the list are those previously set up using the Country Table.

Note. If the **Country** you want to add isn't in the list of valid values, you must first add that Country into the system using the Country Table.

Security Access

Select a **Security Access** level from the list of valid values. Because many companies have operators working with only one limited set of Regulatory Regions, this feature enables you to hide the other Regulatory Regions from the operator. 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 those regions to which the user has access.

Use the ***Available To All*** value when you want all operators to be able to select this Regulatory Region.

Use the ***Not Available To Anyone*** value when you want no operators to be able to select this Regulatory Region.

Use the ***With Global Security Only*** value when you want only operators with that Regulatory Region's **Country** established in their "Included Country" list of Data Security (**Administer HR System, Use, Maintain Data Security)** to be able to select that Regulatory Region.

Note. If you choose not to maintain the country-level data security, then you should use ***Available to All*** or ***Not Available to Anyone*** to provide universal access to Regulatory Regions. To simplify maintenance, availability is only established once for each Regulatory Region and is used for all transactions.

For more information on setting up and administering global security options in PeopleSoft Human Resources, see PeopleSoft 8 Application Fundamentals for HRMS, "Administering Security".

Default Record Group SetIDs

SetID

Use this group box to specify the SetIDs that make up this Regulatory Region. Since Regulatory Region will be 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.

Note. Before you can specify SetIDs, you must define SetIDs, Record Groups, Set Control Values, and TableSet Record Group Controls using the PeopleTools Utilities pages.

For more information on using SetIDs, TableSet Sharing options, and how SetIDs work with Business Units in PeopleSoft Human Resources, see PeopleSoft 8 Application Fundamentals for HRMS, "Regulating HRMS System Data"

When you add a Regulatory Region, the **SetID** field is turned on, and the **Clone From Existing Regulatory Region** field is turned off. The system places a default SetID in the SetID field bearing the same name as the Regulatory Region Code that you just defined. If you haven't defined a SetID that matches this code, you need to select another applicable **SetID** for your Regulatory Region from the list of valid values. The SetIDs in the list are those previously set up using the TableSetID Table. You can only choose from among SetIDs that are stored on the TableSetID Table.

Clone from Existing Regulatory Region

You also have the option to clone the SetIDs attached to this new Regulatory Region from an existing Regulatory Region. You use this option if the new Regulatory Region you're defining requires the exact same default record group SetIDs as those for another region that you've already created.

Enter the regulatory region you want to clone.

Establishing Regulatory Transaction Types

Two sets of Regulatory Transactions are already defined in the system:

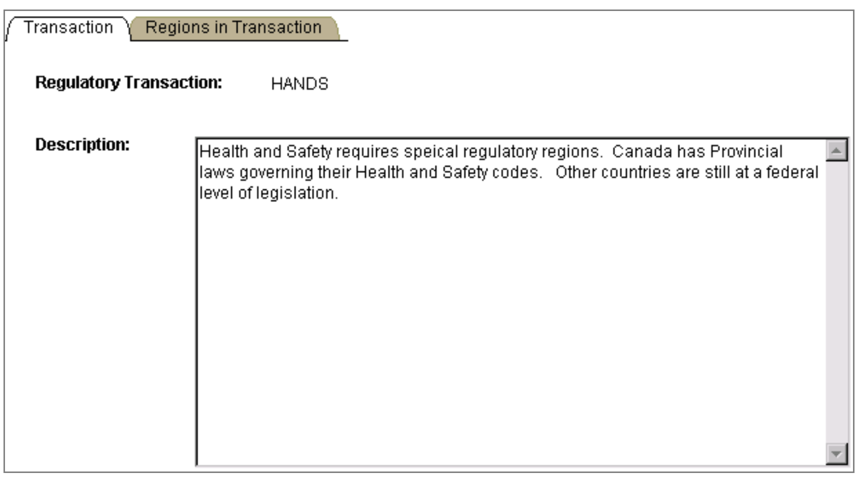
Regulatory Transaction	***Countries or Regions Included***	***Reason***
STANDARD	All countries currently supported in the system.	Most modules apply regulatory and legislative edits at the country level.
HANDS (Health and Safety)	All countries currently included in the system plus the Canadian provinces.	Most modules apply regulatory and legislative edits at the country level, but Canada has specific Provincial laws

Regulatory Transaction	***Countries or Regions Included***	***Reason***
		governing their Health and Safety reporting.

Use the two pages in the Regional Transactions component to assign new Regulatory Regions to these transaction types if there are additional countries or Regulatory Regions you have added to the system and to establish new Regulatory Transactions.

Regional Transactions - Transaction Page

Usage	Use the Transaction page to update the Regulatory Transaction description or to add new regulatory transactions.
Object Name	REG_TRX
Navigation	**Define Business Rules, Administer HR System, Setup, Regional Transactions, Transaction**
Prerequisites	None.
Access Requirements	Enter a Regulatory Transaction.



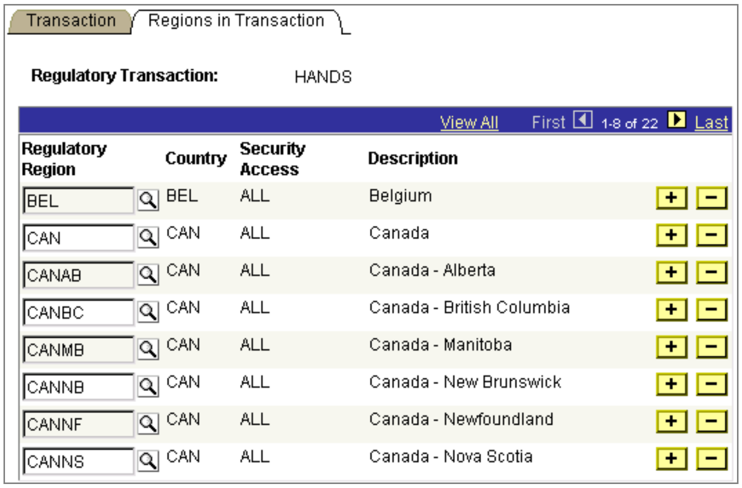
Regional Transactions - Transaction page

Enter a **Description** that explains the purpose of the transaction type. You may enter up to 250 characters to explain the transaction that you're defining. This description is informational only.

Regional Transactions - Regions in Transaction Page

Usage	Use the Regions in Transaction page to define the Regulatory Regions that make up a regulatory transaction type.
Object Name	REG_TRX_REGION

Navigation	**Define Business Rules, Administer HR System, Setup, Regional Transactions, Regions in Transaction**
Prerequisites	None.
Access Requirements	Enter a Regulatory Transaction.



Regulatory Region	Country	Security Access	Description
BEL	BEL	ALL	Belgium
CAN	CAN	ALL	Canada
CANAB	CAN	ALL	Canada - Alberta
CANBC	CAN	ALL	Canada - British Columbia
CANMB	CAN	ALL	Canada - Manitoba
CANNB	CAN	ALL	Canada - New Brunswick
CANNF	CAN	ALL	Canada - Newfoundland
CANNS	CAN	ALL	Canada - Nova Scotia

Regional Transactions –Regions in Transaction page

Regulatory Region Select a **Regulatory Region** from the list of valid values. The Regulatory Regions in the list are those previously set up using the Regulatory Region Table.

If the Regulatory Region you are trying to add isn't in the list of valid values, you must first enter it into the system using the Regulatory Region Table.

Country The system displays the **Country** associated with the **Regulatory Region**.

Security Access The system displays the **Security Access** associated with the **Regulatory Region**.

Description The system displays the **Description** associated with the **Regulatory Region**.

Associating Regulatory Region With a Transaction

Regulatory Region is used as a control field on pages throughout your PeopleSoft Human Resources system, such as Primary Permission List Preferences, Establishment Table, Accommodation Data, Job Data, Position Data, Applicant Hire, and Incident Details. It is almost always a required field.

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

A system of standard defaults assists the operator in choosing the appropriate Regulatory Region and transaction.

In most cases, you can override these 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 specific transaction or application views which only display 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 only display those countries that are available to the user (either Available to All or Global Security Access Only, joined with user Global Security). For example, the following table shows some Regulatory Regions already in the system.

Transaction Type	***Reg Region (char 10)***	***Description Descr50***	***Country Code (alt-search)***	***Security Availability Status***
Standard	BEL	Belgium	BEL	Global Security Access 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
Standard	GBR	UK	GBR	Global Security Access Only
Standard	JPN	Japan	JPN	Not Available
Standard	NLD	Netherlands	NLD	Not Available
Health and Safety	QC	Canada - Quebec	CAN	
Standard	USA	United States	USA	Available to All

You may choose to add Regulatory Regions for your own configuration. For example, you may choose to add the 50 U.S. states and to differentiate at that level for most transactions.

For more information on the security options that you can assign to Regulatory Regions, see Enterprise Integration Point (EIP) Related to the Regulatory Region Page.

Summary: Using Regulatory Region for Transaction Processing

The system identifies the general Regulatory Region for an employee (at EMPL RCD# level) by looking at the current effective Job Record.

For PeopleSoft Human Resources business process functions that need a different Regulatory Region for a transaction than is generally associated with an employee, add Regulatory Region to that transaction. You need to 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.

Be sure to use the Country Field (related display) of the region for all country specific edits. Using this method ensures that the user can go to a finer level of detail for other edits.

How the System Establishes 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.

Administer Workforce Job Data

The system sets the default JOB.REG_REGION on the Work Location page to the value from Position Management, if the system is position controlled; otherwise the default is from Primary Permission List Preferences.

Health and Safety

The system sets the default Regulatory Region on the Incident Details page to the value from Primary Permission List Preferences.

Disability

The system sets the default Regulatory Region on the Disability pages from the effective JOB.REG_REGION.

Establishment

The Establishment REG_REGION defaults from the Primary Permission List Preferences (OPR_DEF_TBL_HR).

Recruit Workforce Job Requisitions

The JOB REQUISITION.REG_REGION defaults first from POSITION.REG_REGION, if the requisition has a position number. Otherwise, it defaults from Primary Permission List Preferences.

Position Management

The POSITION.REG_REGION on the Position Location page defaults from Primary Permission List Preferences (OPR_DEF_TBL_HR).

Impact on PeopleCode Transaction Processing

Most employee transactions involve the STANDARD Regulatory Transaction type. The system performs PeopleCode Edits against the employee's Regulatory Region on 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.

The Regulatory Region field is required on the Job Data pages. From 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 from the Primary Permission List Preferences pages defaults to 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, there are two different prompt views for those transactions. Whenever you add a Transaction to your system, you need to include a new prompt view that can be built from the views included with 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)))
```

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

Examples: Adding REG_REGION to Human Resources Transactions

Below are two examples of how to associate Regulatory Regions with human resources transactions.

Job Data

Here is an example of how you associate REG_REGION to an employee on the Job Data pages:

1. Add the Regulatory Region control field to the Work Location page (Job Data 1) early in the job transaction.

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).

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

Health and Safety

Here is another example: We associated Regulatory Region with incidents in Health and Safety. Regulatory Region is a required field controlling the values returned by all the Health & Safety setup tables having 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 page. Health and Safety incidents have REG_HANDS_VW as the prompt edit.

All of the linked setup values for an incident must belong to the same Regulatory Region. If the Regulatory Region is altered (such as when 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 have the choice of whether to proceed before the values are deleted.

In Health and Safety, the following SetIDs are mapped for each Regulatory Region as shown:

Regulatory Region	***SETID***
BEL	STD
CANAB	CAN

Regulatory Region	SETID
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 in the TableSet Control - Record Group page.

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

The other Regulatory Regions that don't map to a SetID of the same name fall into two additional categories. All the Canadian provinces except British Columbia have no specific provincial codes or values in the system at this time and map to the SetID CAN.

All the other countries supported directly in PeopleSoft Human Resources that don't have any region specific codes or values in the system map to a generic SetID value of STD. This group includes JPN, BEL, and NLD. The following example shows how the set control values for BEL are mapped in the system:

Additional Transaction Modifications for Regulatory Region

We've also added Regulatory Region to the following Human Resources Transactions:

- Position Data, with the REG_STANDARD_VW as the prompt edit
- Job Requisition, with the REG_STANDARD_VW as the prompt edit
- Establishment Table, with the REG_STANDARD_VW as the prompt edit
- Primary Permission List Preferences, with the REG_STANDARD_VW as the prompt edit

- Disabilities/Accommodation Request with the REG_STANDARD_VW as the prompt edit

CHAPTER 3

Working with Currencies

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.

PeopleSoft gives you the flexibility to optimize your corporate and computing resources to meet the challenges of the global marketplace, including the changing requirements of Economic and Monetary Union (EMU).

For more information on how to use the Currency Conversion Utility to convert business units to a new base operating currency, see PeopleSoft 8 Currency Conversion Utility PeopleBook.

Understanding Currency

Understanding currency in PeopleSoft is a two-part process. First, there are the mechanics of defining currency codes, types, exchange rates, and base currency. These are universal to PeopleSoft Human Resources. Then you need to understand how some of the PeopleSoft Human Resources applications use this information. For instance, the PeopleSoft Global Payroll application has extensive, application-specific, currency functionality. In this section, we discuss how to define your currency setup. It's the same no matter which PeopleSoft Human Resources application you use. For details of application-specific currency issues, use the application specific documentation.

Defining Your Currency Setup

In order to use multiple currencies within PeopleSoft Human Resources, you need to set up and maintain the following tables:

- Currency Code Table
- Currency Rate Type Table
- Currency Exchange Rate Table

In addition to setting up these tables, you need to set up and maintain a currency quotation method for each From currency/To currency pair, which forms the basis of your currency conversions.

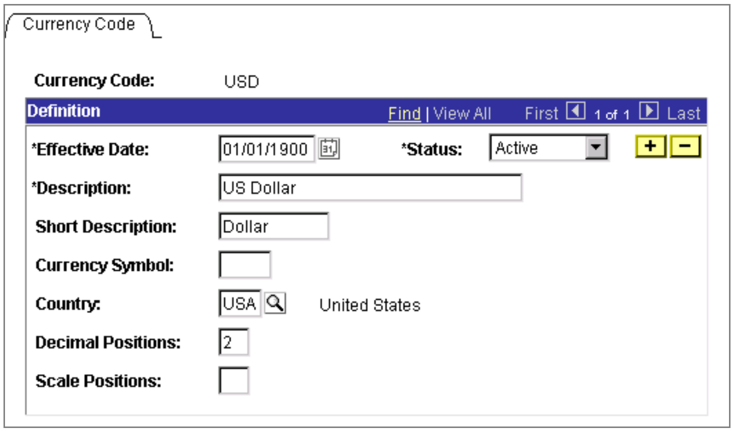
Multicurrency: Maintaining Currency Tables

Use the Currency Code pages to verify that your system contains all the currencies you need to run your operation. To meet the needs of your multi-currency business, PeopleSoft supports the Euro (the European Common Currency) and delivers the Currency Code table with many common currencies identified by the ISO (International Organization for Standardization) standard. We update the table periodically as needed. However, you should confirm that the codes you require are here. If you find that you need additional codes, it's easy to add them.

For more information, see Multicurrency: Configuring Currency Precision. The currency code table supports the ISO standard of zero, two, and three decimal positions. All currency-sensitive amount fields are 13 integers and 2 decimals (13.2), except in some working fields. To meet your international business requirements, you can expand these amount fields to a maximum of 15 integers and 3 decimals (15.3).

Currency Code Page

Usage	Use the Currency Code page to define the decimal position by currency. The values on this table are effective-dated. PeopleSoft ships the currency code table in compliance with ISO standards for decimal positions. As your specific business requirements dictate, you can increase the number of decimals.
Object Name	CURRENCY_CD_TABLE
Navigation	**Define Business Rules, Define General Options, Setup, Currency Code, Currency Code**
Prerequisites	None.
Access Requirements	Enter a Currency Code.



Currency Code page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Effective Date, Status, Description, Short Description.**

Currency Symbol

Although PeopleSoft delivers many currencies with a **Currency Symbol,** such as ***$*** for Australian dollar or ***L*** for Italian lira, you have the option to enter new symbols for various delivered currencies or for currencies you add.

Country

Choose the code for the **Country** from which the currency originates.

PeopleSoft contains fully populated country and state/province code tables. To view country codes, use the Country Table. To view state/province codes, use the State or Province Table. PeopleSoft updates these tables as national boundaries and designations change.

Decimal Positions

Enter the number of **Decimal Positions** that will appear in the notation for the currency. For example, there are two decimal positions for Australian dollars ($5.00), but no decimal positions in the Italian lira (500 L). Changing the decimal positions affects all currency values throughout the system. There is no way to change just one field. Take this into consideration, if you decide to change this value.

Note. Don't decrease the number of decimals once you have transactions for that currency. The system doesn't properly round the previous rounded amount fields with the new precision. You need to write a conversion utility to round the values the way you want and run it before you change the decimal precision.

Scale Positions	Enter the **Scale Positions** you want to round for this currency. Scale positions control numbers to the left of the decimal. For example, if you want all million-dollar amounts displayed as the number of millions without the zeros, enter ***6*** as your scale position. In this case, 24,000,000 would display as 24. Some PeopleSoft applications don't support the **Scale Positions** defined on this page; we recommend that you don't set them if they aren't supported for your application.

For more information about scaling, see Multicurrency: Defining Currency Quotations.

Enterprise Integration Points (EIP) Related to the Currency Code Table

When you add, delete, or change information in the Currency Code table, the system automatically publishes the Currency Code Table EIP message to any other PeopleSoft or third-party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the Currency Code table records.

For more information regarding the subscribers and technical details of the Currency Code Table EIP, see Currency Code Table. For more information about PeopleSoft Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

Multicurrency: Establishing Market Rates

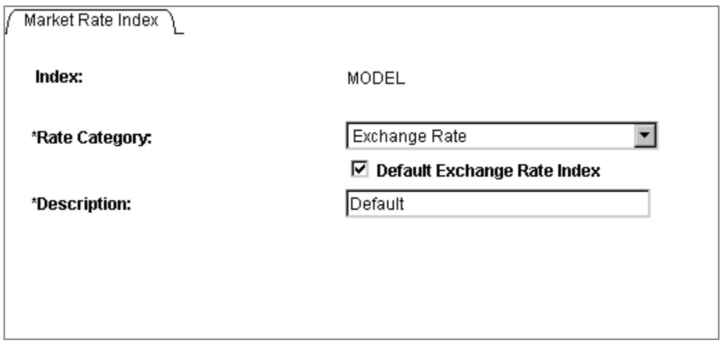
PeopleSoft's approach to market rates and currency conversion has been largely driven by the need to accommodate business practices related to the Euro. In addition to currency exchange rates, PeopleSoft supports the many different types of market rates used in your global business, such as interest rates, stock exchange indices, and economic indicators. For each type of rate, you can capture data from many different sources. For example, you can download exchange rates from Reuters, the Federal Reserve, the Wall Street Journal, and so on.

To support these enterprise-wide requirements related to currency conversion, PeopleSoft provides you with a common repository for all types of market rate data and the option to enter and maintain rates manually.

Market Rate Index Page

Usage	Use the Market Rate Index page to describe the indices for which You

	track rates. Examples of typical indices are LIBOR, Bloomberg foreign exchange, and Reuters foreign exchange. Basically, an index categorizes the various market rates you track.
Object Name	RT_INDEX_TBL
Navigation	**Define Business Rules, Define General Options, Setup, Market Rate Index, Market Rate Index**
Prerequisites	None.
Access Requirements	Enter a Market Rate Index.



Market Rate Index page

Index — The default **Index, *MODEL,*** is used for currency exchange rates.

Rate Category — Select a **Rate Category** from the list. You can choose from ***Commodity Price, Economic Indicator, Exchange Rate, Interest Rate, Other, Stock Exchange Index,*** and ***Stock Price.***

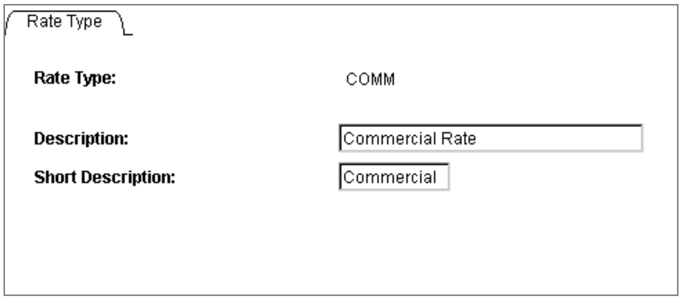
Default Exchange Rate Index — If you are entering ***Exchange Rate*** indices, you can select the **Default Exchange Rate Index** box to indicate that a particular index is used to calculate currency exchange rates. You can specify only one index code as the default.

Description — Enter a short **Description** for the index.

Currency Rate Type Page

Usage	Use the Currency Rate Type page to identify the specific rate types on which your exchange rates are based. These provide further categorization of market rates. Typical rate types are official, commercial, floating, average, historical, contract, and so on.
Object Name	RT_TYPE_TBL
Navigation	**Define Business Rules, Define General Options, Setup, Currency Rate Type, Rate Type**

Prerequisites	Complete the Currency Code Page.
Access Requirements	Enter a Rate Type.



Currency Rate Type page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Short Description.**

Rate Type When converting from one currency to another, the rate type tells the system which exchange rate to use. By using rate types, you can convert the same currency using more than one exchange rate. Depending on your requirements, you may have several different rate types.

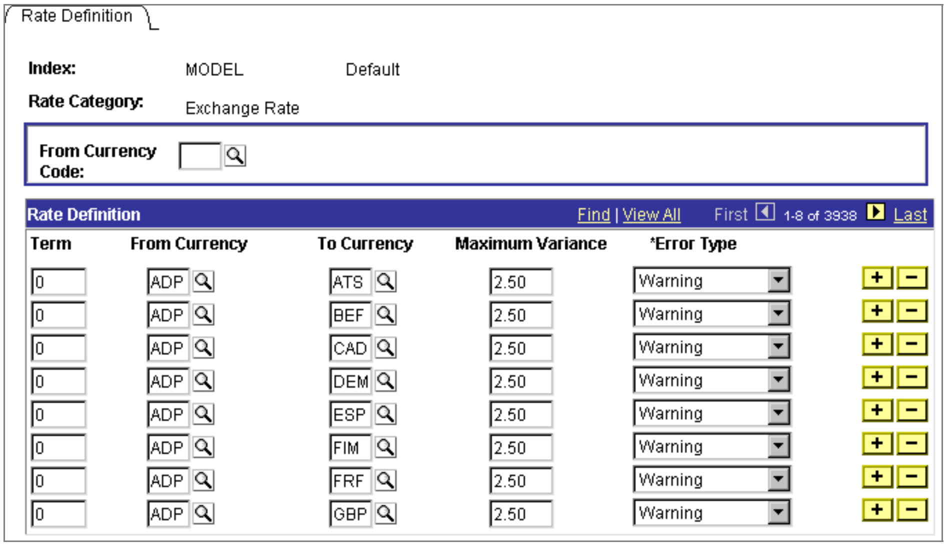
Example

You have ten employees in Germany on assignment from England. They receive their housing allowance in marks, rather than sterling. You have agreed with nine of the employees that the exchange rate used to determine the amount deposited will be the official bank rate at the time of payment. However, you've made a separate agreement with the tenth employee. He has a fixed rate for the duration of his assignment. To administer this, you need to exchange sterling to marks at two separate rates: the official bank rate and the fixed contract rate. So you would set up two currency rate types, perhaps one called Official and another called Contract.

Market Rate Definition Page

Usage	Use the Market Rate Definition page to enter a market rate definition. The Market Rate Definition page enables you to define tolerance limits for rates and to determine what action should occur if a new rate falls outside the set tolerance limit. The fields on this page differ according to the Rate Category of the Market Rate Index.
Object Name	RT_RATE_DEF_TBL
Navigation	**Define Business Rules, Define General Options, Setup, Market Rate Definition, Rate Definition**
Prerequisites	Complete the Market Rate Index Page.

Access Requirements	Enter a Market Rate Index.



Market Rate Definition page

Term

Enter the desired **Term** (expressed in days). A zero (***0***) term indicates a spot rate; only PeopleSoft Treasury uses nonzero terms.

From Currency and **To Currency**

Enter the appropriate **From Currency** and **To Currency.** These values are used for exchange rate pairs. When using triangulation, you need to include a definition for each of the currency pairs involved.

For more information about triangulation, see Currency Quotation Method Page.

Maximum Variance

In the **Maximum Variance** field, indicate the percentage of variance allowed when the user maintains the market rate. You receive an error message if the change exceeds the tolerance. The default value is ***2.5%.***

Error Type

Enter the type of error processing that occurs if the Maximum Variance is exceeded:

None: No error processing occurs; the new rate is used, even though it exceeds the limit.

Warning: A warning is displayed. You can ignore it, if desired, and save the new rate.

Stop: Processing halts; the system prevents you from saving the new rate.

Market rate definitions specify the valid term, currency, and other appropriate field combinations for market rates. For example, unless you have a market rate definition for an exchange rate with Term ***30,*** a **From Currency** of ***FRF,*** and a **To Currency** of ***USD,*** you can't enter a rate using this combination in the market rate table.

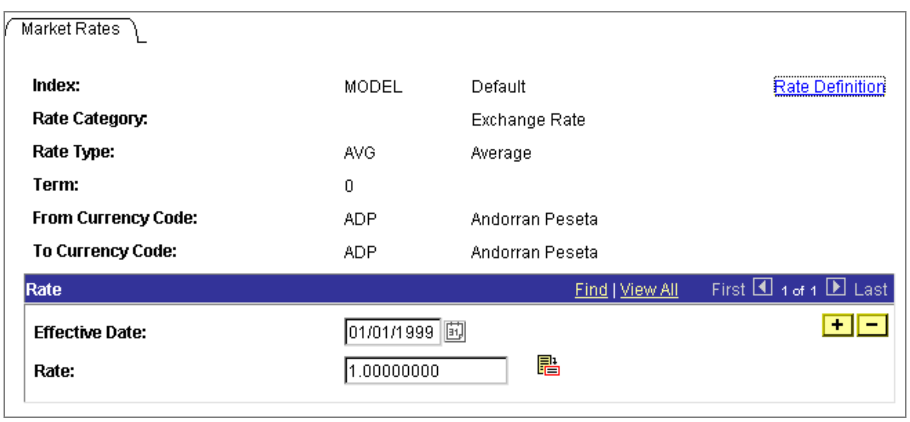
Multicurrency: Maintaining Market Rates

Once you enter currency codes into the system and determine your currency rate type requirements, enter and track the actual rates of exchange in the Currency Exchange Rate Table. Depending on your organization's needs, you may have to update the rates frequently. Various applications use these rates. If you're using exchange rates, it is your responsibility to ensure they are up-to-date and accurate for your purposes.

To generate a list of your current exchange rates, run the Currency Rate Table report (PER714).

Market Rates Page

Usage	Use the Market Rates page and associated pages to enter and maintain market rates. The rates are effective-dated, enabling you to track them as they change over time.
Object Name	RT_RATE_PNL
Navigation	**Define Business Rules, Define General Options, Setup, Market Rates, Market Rates**
Prerequisites	Complete the Currency Code and Rate definition pages.
Access Requirements	In the **Market Rates** dialog box, specify the Market Rate **Index, Term, From Currency Code,** and **Rate Type.** For exchange rates, also indicate the **To Currency Code.**

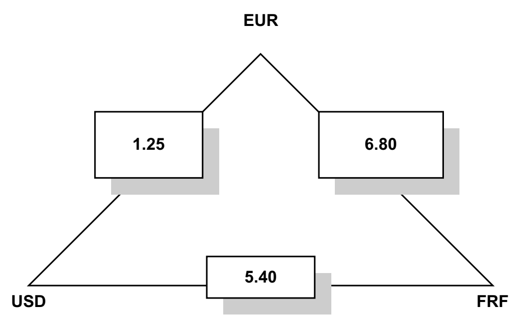


Market Rates page

Effective Date Enter the **Effective Date,** if it is other than the current date.

Rate	Enter the **Rate** as of the Effective Date. The Rate field displays the visual rate, or in the case of triangulated exchange rates, the primary visual rate, which is typically the cross rate, but which can also be one of the other component rates of the triangle. You can edit the rate for non-triangulated rates, and also for triangulated rates if a quotation method has been defined for the currency pair and the Cross-Rate Allow Override check box is selected on the Currency Quotation Method page. If override isn't allowed, users can update the exchange rate values to and from the reference currency in the Exchange Rate Detail page.

The following graphic represents the three component visual rates in an exchange rate from FRF (French francs) to USD (U.S. dollars), triangulating via the Euro. You can access all three visual rates of a triangulated exchange rate by opening the Rate Detail page.



Currency Triangulation with the Euro

You can edit the **Rate** field *unless* all of the following conditions are true:

- The rate is triangulated.
- The primary visual rate is the cross rate.
- The Allow Override check box on the Currency Quotation Method page is cleared for the exchange rate's quotation method.

Typically, you don't maintain triangulated exchange rates online. Instead, You maintain the rates of the From currency to the Reference currency and the Reference currency to the To currency, then run the Cross-Rate Reciprocal SQR (FIN9030.SQR) to define the triangulated exchange rates.

For more information on how triangulated exchange rates can be maintained, see Cross/Reciprocal Rate Calc - Parameters Page.

If a quotation method has been defined for the currency pair, and if the Auto Reciprocate check box for quotation method is selected, then creating or maintaining a rate for a currency pair automatically creates or updates the rate of the reciprocal currency pair. For example, if you change the USD to GBP (Great Britain pound) rate, the GBP to USD rate is automatically updated. You can automatically reciprocate only currency pairs for which quotation methods have been defined.

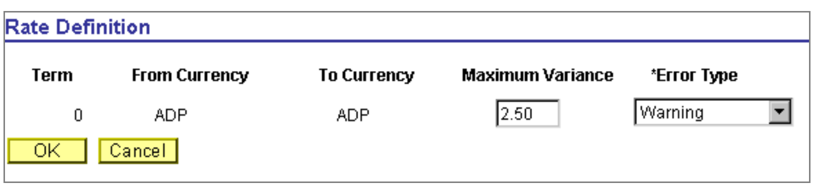
If a rate definition doesn't already exist for the currency pair, one is automatically created with the default values of 2.5% maximum variance and Warning message processing. You can use the Detail button in the upper-right corner of the page to view or change the rate definition values.

The results of changing the rate definition don't take effect until you save, close, and then reopen the Market Rates page.

Click the **Exchange Rate Detail** button to access the Exchange Rate Detail page, where you can view your currency exchange rates.

Market Rates - Rate Definition Page

Usage	Use the Rate Definition page to modify the settings for the market rate.
Object Name	RT_RATE_DEF_SEC
Navigation	Click the Rate Definition button on the Market Rates page.



Market Rates - Rate Definition page

Maximum Variance

If desired, you can modify the **Maximum Variance,** the percentage of variance allowed when users maintain the market rate. If the change exceeds the tolerance, an error results. The default value is ***2.5%.***

Error Type

You can also modify the **Error Type,** referring to the type of error that results when the tolerance defined in the Maximum Variance field is exceeded during data entry. The Error Type values are:

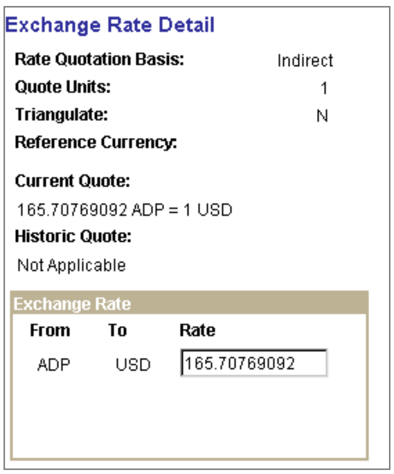
None: No error processing occurs; the new rate is used even though it exceeds the limit.

Warning: A warning is displayed. You can ignore it, and save the new rate.

Stop: Processing halts; the system prevents you from saving the new rate.

Market Rates - Exchange Rate Detail Page

Usage	Use the Exchange Rate Detail button to view currency exchange rates.
Object Name	EXCH_RT_DTL
Navigation	Click the Exchange Rate Detail button on the Market Rates page.



Market Rates - Exchange Rate Detail page

For triangulated rates, you can update all three components of the triangulated rate; whereas on the Market Rates page you can only maintain the primary visual rate (unless the Allow Override check box in the Currency Quotation Method page for the exchange rate is cleared).

When you're looking at a historic exchange rate, the rate displays according to the current quotation method, which isn't necessarily the quotation method originally used by the historic rate. This makes it convenient for you to compare how the exchange rate has changed over time, using a consistent quotation method, even if the quotation method has actually changed. When the system determines that the historic quotation method and the current quotation method are different, it lets you know by displaying a historic quote in the Historic Quote field.

Above you can see the Exchange Rate Detail page as it would appear for a triangulated currency pair. For non-triangulated currency pairs, the lower section of the page contains just the visual rate.

The Exchange Rate Detail page displays the rules by which the exchange rate is calculated. You can modify the **Rate** values if necessary.

The read-only fields include:

Rate Quotation Basis Displays the **Rate Quotation Basis** for the exchange rate as defined on the Currency Quotation Method page. If no quotation method is defined, the quotation basis is ***Direct.***

Quote Units

Displays the **Quote Units** for the exchange rate as defined in the Currency Quotation Method page. If no quotation method is defined, the quote units is ***1.***

Triangulate

Displays the **Triangulate** setting for the exchange rate as defined in the Currency Quotation Method page. If no quotation method is defined, the Triangulate setting is ***N.***

Reference Currency

Displays **Reference Currency** for triangulated exchange rates only and shows the reference currency used in the triangulated exchange.

Current Quote

Displays the **Current Quote** (exchange rate) used to convert the **From** currency to the **To** currency. A direct, non-triangulated rate shows quote units (or 1) on the left side of the equals sign and the visual rate on the right. For example:

```
1 USD = 1.40000000 CAD
```

An indirect, non-triangulated rate displays the visual rate on the left side of the equals sign and quote units (or 1) on the right. For example:

```
1.400000000 CAD = 1 USD
```

A triangulated rate displays two component rates of the triangle: the rate for converting the **From** currency to the **Reference** currency, and the rate for converting the **Reference** currency to the **To** currency. For example:

```
1.25 USD = 1 EUR = 6.8 FRF
```

Historic Quote

Displays a quote indicating the quotation method originally used by a historic exchange rate, if the system determines that the quotation method originally used by the historic rate was different from the current quotation method. For example, the **Historic Quote** field displays a quote if the historic rate converted the **From** currency to the **To** currency directly using a calculated reciprocal rate, but the current quotation method for the currency pair is now indirect. The field would also display a quote if the **Historic Quote** method was non-triangulated and the current quote method is triangulated. If the system doesn't determine that the **Historic** and **Current Quote** methods are different, the **Historic Quote** field displays ***Not Applicable.***

Exchange Rate

Displays a single visual rate for non-triangulated **Exchange Rates** or all three component visual rates for triangulated **Exchange Rates.** The cross rate for triangulated exchange rates is editable only if the Allow Override check box is selected in the **Exchange Rate's** quotation method definition.

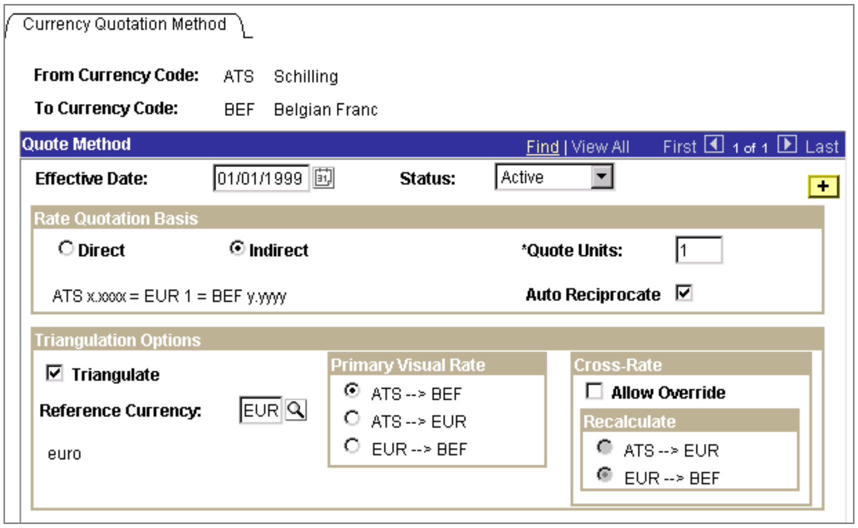
Multicurrency: Defining Currency Quotations

PeopleSoft supports direct and indirect rate quotation, quote units, and triangulation. These options provide you with flexible and accurate tools to convert and manage your multi-currency operations.

For more information on calculating rates, see Multicurrency: Calculating Currency Rates.

Currency Quotation Method Page

Usage	Use the Currency Quotation Method page to set up and maintain a currency quotation method for each From currency/To currency pair. You define conversion options after you enter the rates and the currency pairs, but before you calculate the rates. For currency pairs that triangulate, you wouldn't typically maintain rates online. Instead, the Cross Rate/Triangulation Generation SQR uses the rates between the From currency and the reference currency, and the reference currency and the To currency to determine the cross rate.
Object Name	CURR_QUOTE_PNL
Navigation	**Define Business Rules, Define General Options, Setup, Currency Quotation Method, Currency Quotation Method**
Prerequisites	Complete the Currency Code and Rate definition pages.
Access Requirements	Enter Currency Codes.



Currency Quotation Method page

Rate Quotation Basis

You begin in the **Rate Quotation Basis** group box by determining whether you want the rates for a currency pair quoted directly or indirectly.

Direct	A **Direct** quote indicates that the From Currency Code will be quoted directly against the To Currency Code. (1 From Currency Code = x.xxx To Currency Code.)
Indirect	An **Indirect** quote indicates that the To Currency Code will be quoted directly against the From Currency Code. (1 To Currency Code = x.xxx From Currency Code.)

Example

With a conversion of U.S. dollars (USD) to French francs (FRF), a **Direct** quote indicates that 1 USD = x.xxxx FRF. In this case, French francs are quoted directly against the U.S. dollar. An **Indirect** quote indicates that x.xxxx USD = 1 FRF. Currency pairs that triangulate must be classified as either direct or indirect for use in displaying the calculated cross rate. Two fields store the rate conversion factor: RATE_MULT and RATE_DIV. With these in mind, the currency conversion formula is always:

```
From currency * RATE_MULT/RATE_DIV = To currency
```

Quote Units	**Quote units,** sometimes called scaling factors, preserve decimal position. You can enter any value in this field, although quote units generally have a scale of 10 (such as 10, 100, 1000).

Example

The exchange rate between ITL and FRF may be stated as:

1000 ITL = 3.407823 FRF

instead of

1 ITL = 0.00340782 FRF

The use of quote units is common business practice in several European countries. The default value for this field is ***1.***

Auto Reciprocate When you select the **Auto Reciprocate** check box for a particular currency pair, the system automatically creates or updates the rate for the reciprocal currency pair whenever an exchange rate is added or updated. For example, when you enter a new USD to GBP rate, the GBP to USD rate is automatically updated. You can only auto reciprocate currency pairs for which quotation methods have been established. The box is selected by default.

Triangulation Options

Triangulate Select **Triangulate** to have the system convert two currencies through a third currency (the reference currency). Triangulation is used in hyperinflationary environments where all conversions to the local currency are done through a stronger, more stable currency, such as the U.S. dollar. It is also used to convert a currency participating in the European Common Currency, the Euro. With the introduction of the Euro, all participating currencies will be quoted directly against the Euro.

Example

The following examples help clarify indirect quotation, direct quotation with quote units, and triangulation:

- 100 USD to GBP (indirect) = (100 USD / 1.6) * 1 = 62.50 GBP
- 1000 CHF to DEM (direct with units) = (1000 CHF / 100) * 119.335 = 1193.35 DEM"
- 100 USD to FRF (triangulate) = (100 USD / 1.25) * 6.8 = 544 FRF

For example, to convert from USD to FRF, you do a two-step conversion: First convert the USD amount to the reference currency using the appropriate spot rate, and then convert the reference currency to FRF using the fixed exchange rate. Typically, you wouldn't maintain these rates directly; instead, you would process them and all rates through the Cross/Reciprocal Rate Calculator. The following example shows the conversion for an indirect-triangulated currency pair:

Currency Pair	*Quote Method*	*Quote Units*	*Visual Rate*	*Rate-Mult*	*Rate-Div*
USD to Euro	Indirect	1	1.25	1	1.25
Euro to FRF	Direct	1	6.8	6.8	1

USD to FRF	Triangulate/Euro	1	n/a	6.8	1.25

Reference Currency — Select the **Reference Currency,** the currency through which the From currency will be converted. For example, when converting between French francs and U.S. dollars, the reference currency would be the Euro.

Primary Visual Rate — With triangulated currency pairs, there are three exchange rates to consider: the rate between the From and reference currencies, the rate between the reference and To currencies, and the cross rate between the From and To currencies. The **Primary Visual Rate** options enable you to select which of these three rates you want to be the primary rate, the one that displays on primary pages and reports.

Cross-Rate — In the **Cross-Rate** group box, select **Allow Override** to enable users to override the cross rate for a triangulated currency pair. If you leave this option unselected, users can only change the components of the triangulated rate.

Recalculate — If you select **Allow Override,** you must specify which currency pair the system should use to **Recalculate** to keep the triangle accurate.

Automatic Reciprocation of Quote Methods

The Currency Quotation Method page automatically reciprocates itself when you set up a From currency that has already been used as a To currency. For example, if you define the conversion of USD to GBP as indirect and then define the GBP to USD record, this record is automatically created to indicate a direct quote method. If you change the quote method on the GBP to USD record, the USD to GBP record is automatically updated.

The following table shows each possible field value with its reciprocal value:

Field	***Value (such as, for USD to FRF)***	***Reciprocal Value (such as, for FRF to USD)***
Quotation Basis	***Direct***	***Indirect***
	Indirect	***Direct***
Quote Units	Any valid value	Same value
Rate Decimal Positions	***4*** (default value)	Same value
Auto Reciprocate	Yes	Yes
	No	No

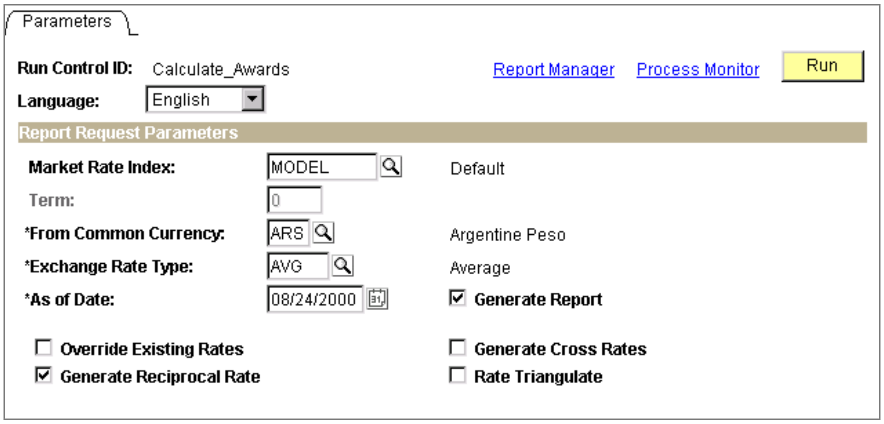
Triangulate	Yes	Yes
	No	No
Reference Currency	Any valid value	Same value
Primary Visual Rate	From → To (such as, USD → FRF)	From → To (such as, FRF → USD)
	From → Ref (such as, USD → EUR)	Ref → To (such as, EUR → USD)
	Ref → To (such as, EUR → FRF)	From → Ref (such as, FRF → EUR)
Cross-Rate Allow Override	Yes	Yes
	No	No
Cross-Rate Recalculate	From → Ref (such as, USD → EUR)	Ref → To (such as, EUR → USD)
	Ref → To (such as, EUR → FRF)	From → Ref (such as, FRF → EUR)

Multicurrency: Calculating Currency Rates

PeopleSoft provides two tools for calculating currencies: the Cross/Reciprocal Rate Calculator and the Currency Exchange Calculator. All rates are processed through Cross/Reciprocal Rates and checked against the definitions established for each currency pair on the Currency Quotation Methods page. The Currency Exchange Calculator page quickly calculates rates between currencies.

Cross/Reciprocal Rate Calc - Parameters Page

Usage	Use the Cross/Reciprocal Rate Calc - Parameters page to set up reciprocal and cross rates.
Object Name	RUN_EO9030
Navigation	**Define Business Rules, Define General Options, Process, Cross/Reciprocal Rate Calc, Parameters**
Prerequisites	Complete the Currency Code Page.
Access Requirements	Enter a Run Control ID



Cross/Reciprocal Rate Calc –Parameters page

Language Choose the language for translation.

Market Rate Index Choose the market rate index.

Term Choose the term. For non-Treasury applications, use the default index, ***MODEL,*** and a term of ***0.***

From Common Currency Choose the From Common Currency type.

Exchange Rate Type Choose the Exchange Rate Type.

As of Date Enter the date pertaining to the exchange rate that you use in this rate calculation.

Generate Report Select the **Generate Report** check box if you want to generate a report that displays the exchange rates and the reciprocal and cross-rate calculations.

Override Existing Rates If you want this calculated rate to override rates for this Exchange Rate Type currently residing on the Exchange Rate table (regardless of their As Of Date), select the **Override Existing Rates** check box.

Generate Reciprocal Rate

Select the **Generate Reciprocal Rate** check box to have the system automatically calculate reciprocal rates for you. Note that PeopleSoft doesn't directly manipulate the exchange rates; rather, the system uses numerator and denominator values such that:

```
From currency * RATE_MULT/RATE_DIV = To
currency
```

Suppose you want a reciprocal rate between U.S. dollars and French francs. You enter USD to FRF = 5; the system automatically generates the reciprocal rate FRF to USD = 1/5, or 0.2. The conversion formula in this case would be:

$$xFRF\ \frac{(RT\_MULT)\quad 1}{(RT\_DIV)\quad 5} = yUSD$$

To have the system generate reciprocal rates, select a **From Curr (Currency)** and a **To Curr (Currency)** at the bottom of the page.

Generate Cross Rates

You can choose to have the system automatically **Generate Cross Rates.** For example, for cross-currency rates between dollars, francs, and German deutsche marks, you enter USD to FRF = 5 and USD to DEM = 1.43; the system automatically generates FRF to DEM = 1.43/5 = 0.286. If you choose to generate cross rates, select a **From Curr** and a **To Curr**. The **To Curr** field is useful if you need a particular rate. You can enter a wild card of **%** in either field or both fields to indicate from all or to all currencies. Press **F7** to add more currency types for cross-rate generation.

Rate Triangulate

Select **Rate Triangulate** to have the system convert two currencies through a third currency.

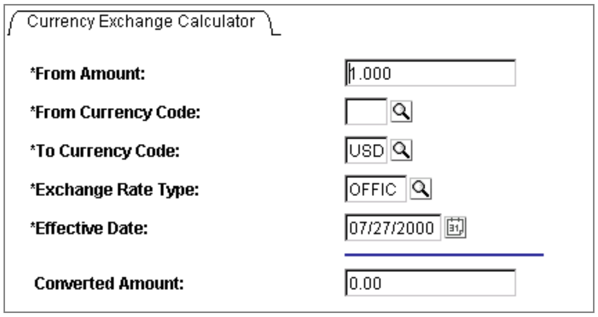
Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Currency Exchange Calculator Page

Usage	Use the Currency Exchange Calculator to calculate the currency exchange between currencies. This tool enables you to enter a rate or amount in a currency other than the base currency, or to compute an exchange using an alternative rate type.
Object Name	CURRENCY_EXCHNG_PN

Navigation	**Define Business Rules, Define General Options, Setup, Currency Exchange Calculator, Currency Exchange Calculator**
Prerequisites	Complete the Currency Code Page.
Access Requirements	None.



Currency Exchange Calculator page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Effective Date.**

From Amount	The currency exchange is based on the **From Amount** you enter and the current exchange rate set up on the Market Rates page.
From Currency Code	Enter a currency code for the currency from which you are exchanging.
To Currency Code	Enter a currency code for the currency to which you are exchanging.
Exchange Rate Type	Enter the rate type for the exchange.
Converted Amount	The system automatically calculates the amount in the **Converted Amount** field when you save the page.

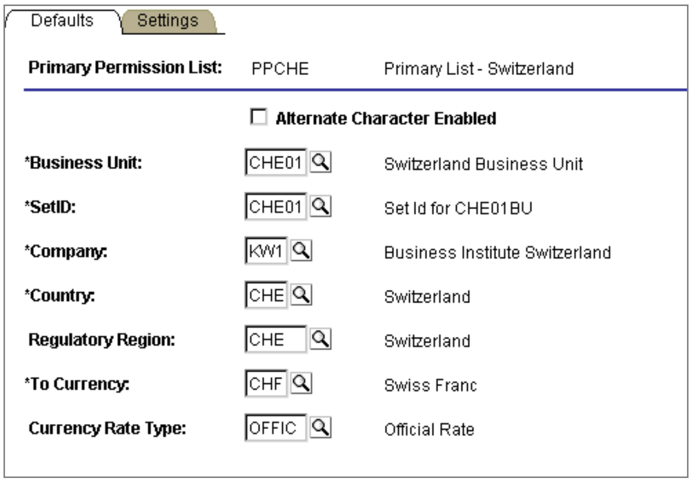
Setting Primary Permission List Preferences for Currency

In order to individualize your system, you can set primary permission list preferences for your user IDs. This enables you to specify your system defaults at the primary permission list level.

Primary Permission List Preferences - Defaults Page

Usage	Use the Primary Permission List Preferences Page to set defaults for a primary permission list.
Object Name	OPR_DEF_TBL_HR

Navigation	**Define Business Rules, Define General Options, Setup, Primary PrmList Preferences, Defaults**
Prerequisites	Complete the Currency Code Page.
Access Requirements	Enter a Primary Permission List.



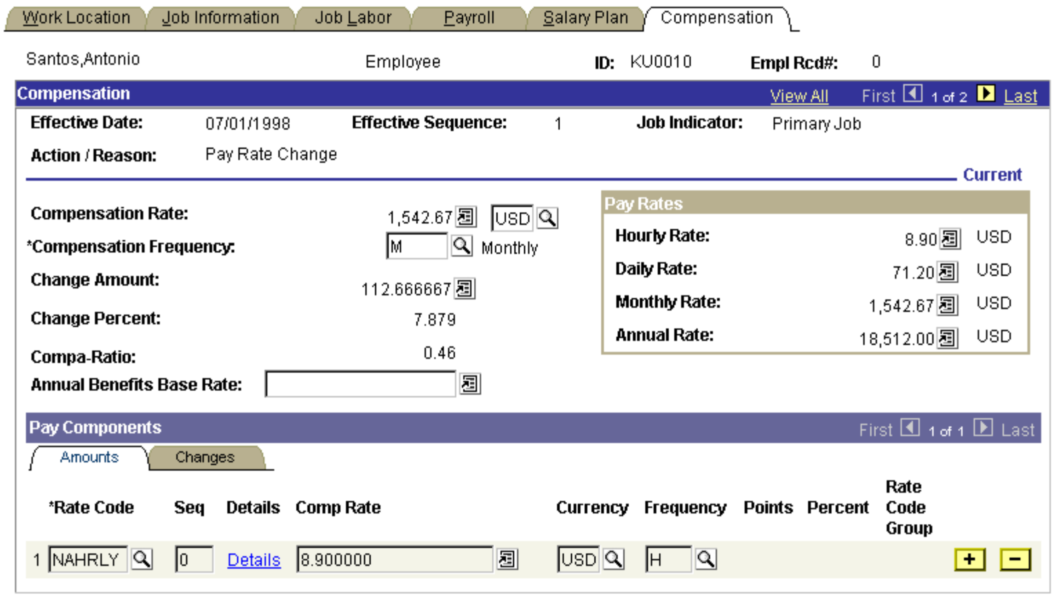
Primary Permission List Preferences - Defaults page

By entering **To Currency** and **Currency Rate Type,** you set defaults for this primary permission list. When they use pages, these values appear as defaults.

For more information on the Primary Permission List Preferences page, see Setting Up Primary Permission List Preferences.

Viewing Multiple Currencies

Many of the pages displaying earnings or amounts in one currency allow you to view these amounts in another currency. This is an integral feature of PeopleSoft's EMU support, and enables you to view conversions across all currencies supported by the system. Because this functionality is accessed in the same way on all the pages, we use one example–the Compensation page in PeopleSoft Human Resources–to illustrate this feature wherever it appears.



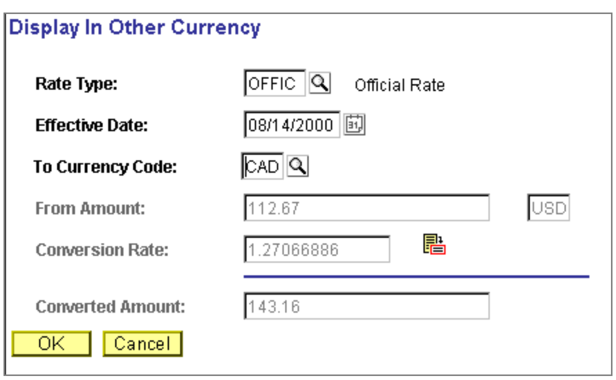
Job Data - Compensation page

On any page with the cross-currency feature, the field (or fields) that enable multi-currency display is outlined in black.

To view an amount in this field in another currency, click the **Display In Other Currency** button. The Display In Other Currency page appears.

Display in Other Currency Page

Usage	Use the Display In Other Currency page to view an amount on a field in another currency.
Object Name	CURRENCY_OTHER
Navigation	Click the Display In Other Currency button on a page featuring currency fields.



Display in Other Currency page

Rate Type

Choose a rate type to use in converting the amount displayed on the previous page to another currency.

Effective Date

Choose an effective date to use in converting the amount displayed on the previous page to another currency.

To Currency Code

Use the **To Currency Code** field to choose the currency into which you want to convert the amount displayed on the previous page.

From Amount

This is the amount from the previous page to be converted.

Conversion Rate

In the **Conversion Rate** field, enter the currency type that applies to the amount you want to convert.

Converted Amount

The converted amount in the target currency appears in the **Converted Amount** field.

Click the **Exchange Rate Detail** button to see details of the conversion process on the Exchange Rate Detail page.

OK

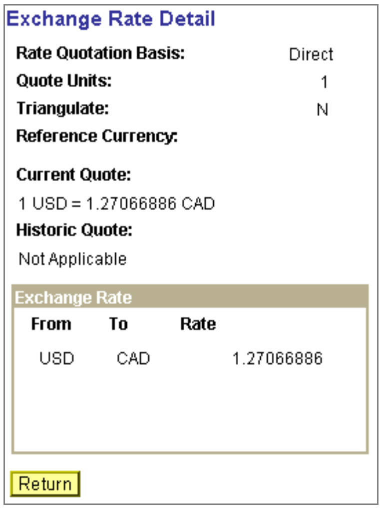
Click **OK** to save your changes and return to the last page you were on.

Cancel

Click **Cancel** to return to the last page you were on without saving your changes.

Exchange Rate Detail Page

Usage	Use the Exchange Rate Detail page to view information about current exchange rate calculations
Object Name	EXCH_RT_DTL_INQ
Navigation	Click the Exchange Rate Detail button on the Display In Other Currency page.



Exchange Rate Detail page

The Exchange Rate Detail page shows information on the current and historic exchange rates, the **From** currency, the **To** currency, and the **Rate** of exchange you used in your currency conversion. Click **Return** to return to the Display in Other Currency page.

Multicurrency: Configuring Currency Precision

According to the ISO Standard, currency precision can range from zero decimals to three decimals. For example, U.S. dollar amounts have two digits to the right of the decimal; Japanese yen have none. To support this dynamic currency precision, PeopleSoft delivers all its currency-sensitive amount fields with a standard length of 13.2, that is, 13 digits to the left of the decimal and two 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 to 123.230. The system doesn't place a nonzero 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 its features. With the option turned off, all the amount fields behave as if no controlled currency exists. In other words, the system displays amount fields as defined in Application Designer and rounds them to the number of decimals defined there.

Activate the PeopleTools multi-currency option on the PeopleTools Options page by selecting the Multi-Currency check box. Some PeopleSoft applications are shipped with the multi-currency option selected. You can change the default, if desired.

Be aware that once you turn off this option, turning it back on does *not* automatically round the existing transactions amounts. If you turn off the Multi-Currency option, PeopleSoft only supports the default amount field size of 13.2. It does *not* support the larger amount field size of 15.3.

Reporting With Currency Precision

Most PeopleSoft SQR reports display the currency-controlled amounts to the number of decimals defined by the associated currency. For example, a Japanese yen amount displays as 123 on a report and a U.S. dollar amount displays as 123.23.

For reporting with Crystal and PS/nVision (Excel), the amount displays as a two-decimal number. You have to modify the reports if you want to show three decimals on these reports.

Our third-party reporting tools don't fully support numeric fields greater than 15 digits. Excel uses an eight-byte float for numeric fields. This causes truncation after the 15th digit. Crystal displays up to 16 digits correctly; when the numbers are greater than that, it starts to insert nonsensical numbers into the decimal positions. Please be aware that this should only be a problem for 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, suppose you enter 2s into a 15.3 numeric database amount field:

# of Digits	***Crystal***	***Excel***	***SQR***
16	2,222,222,222,222.22 2	2,222,222,222,222.220	2,222,222,222,222.22 2
17	22,222,222,222,222.2 19	22,222,222,222,222.20 0	22,222,222,222,222.2 20

# of Digits	Crystal	Excel	SQR
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

Optionally, with some PeopleSoft applications you can expand your database from the original amount field size of 13.2 to 15.3 digits. For example, PeopleSoft supports the larger field size of 15.3 across the Financials, Distribution, and Manufacturing application lines.

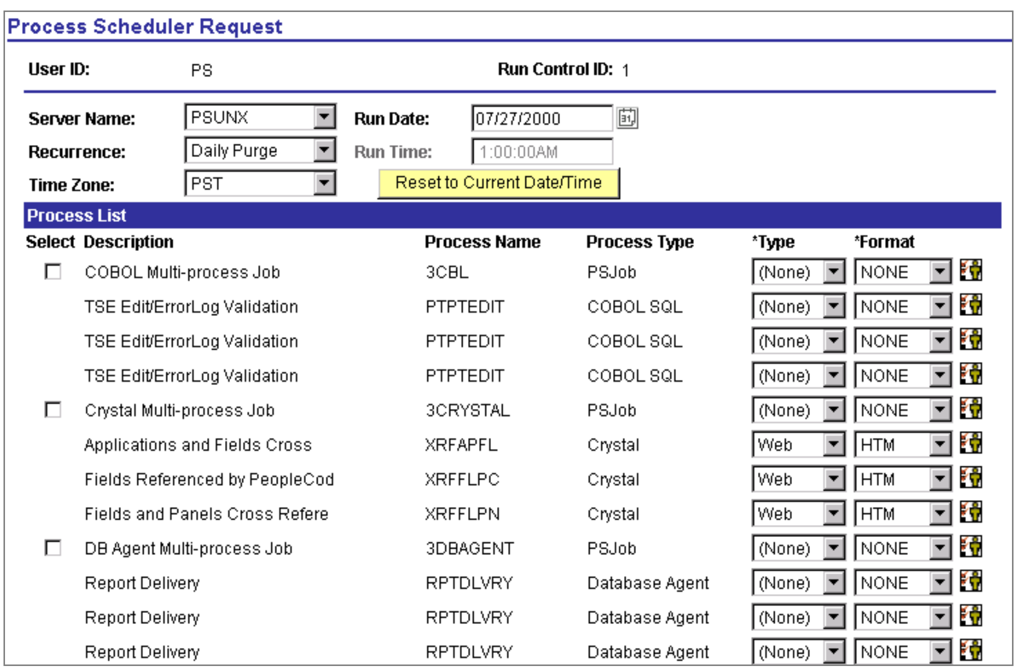
To expand your database:

1. Back up your database.

This step is optional, although we highly recommend it. This way, you can recover your database if you experience any database integrity problems during the following steps.

2. Run Audit scripts.

Run DDDAudit and SYSAudit from Process Scheduler to make sure the database is clean. Select **PeopleTools, Process Scheduler Manager, Process, Multiple Process Sample** and enter a Run Control ID. Click **Run** or choose **File, 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.



Process Scheduler Request

User ID: PS   Run Control ID: 1

Server Name: PSUNX   Run Date: 07/27/2000
Recurrence: Daily Purge   Run Time: 1:00:00AM
Time Zone: PST   Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format
☐	COBOL Multi-process Job	3CBL	PSJob	(None)	NONE
	TSE Edit/ErrorLog Validation	PTPTEDIT	COBOL SQL	(None)	NONE
	TSE Edit/ErrorLog Validation	PTPTEDIT	COBOL SQL	(None)	NONE
	TSE Edit/ErrorLog Validation	PTPTEDIT	COBOL SQL	(None)	NONE
☐	Crystal Multi-process Job	3CRYSTAL	PSJob	(None)	NONE
	Applications and Fields Cross	XRFAPFL	Crystal	Web	HTM
	Fields Referenced by PeopleCod	XRFFLPC	Crystal	Web	HTM
	Fields and Panels Cross Refere	XRFFLPN	Crystal	Web	HTM
☐	DB Agent Multi-process Job	3DBAGENT	PSJob	(None)	NONE
	Report Delivery	RPTDLVRY	Database Agent	(None)	NONE
	Report Delivery	RPTDLVRY	Database Agent	(None)	NONE
	Report Delivery	RPTDLVRY	Database Agent	(None)	NONE

Running DDAUDIT (1 of 2)

[ ]	SQR Multi-process Job	3SQR	PSJob	(None)	NONE
	Cross Reference Field Listing	XRFIELDS	SQR Report	Web	PDF
	Menu Listing Report	XRFMENU	SQR Report	Web	PDF
	Cross Reference - Records and	XRFRCFL	SQR Report	Web	PDF
[ ]	All Process Types	ALLTYPES	PSJob	(None)	NONE
	TSE Edit/ErrorLog Validation	PTPTEDIT	COBOL SQL	(None)	NONE
	Applications and Fields Cross	XRFAPFL	Crystal	Web	HTM
	Applications and Fields Cross	XRFAPFL	SQR Report	Web	PDF
	Report Delivery	RPTDLVRY	Database Agent	(None)	NONE
[ ]	Requisition Status	APP003	SQR Report	Web	PDF
[ ]	Candidate Listing	APP005	SQR Report	Web	PDF
[ ]	Requisition Cost Analysis	APP006	SQR Report	Web	PDF
[ ]	Company Car Report	CAR003	SQR Report	Web	PDF
[ ]	Contract Information	CNT001	SQR Report	Web	PDF
[x]	Data Designer/Database Audit	DDDAUDIT	SQR Report	Web	PDF
[ ]	60 Day Notifications	FGDBA001	Database Agent	(None)	NONE
[ ]	Union Membership	FGHR015	SQR Report	Web	PDF
[ ]	Interview Schedule	FGHR021	SQR Report	Web	PDF
[ ]	Batch Group and Generic WF	GBJOB	PSJob	(None)	NONE

Running DDAUDIT (2 of 2)

3. Review script output to ensure a clean database.

Locate DDDAudit and SYSAudit reports in your environment and review them to ensure 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 specified in Application Designer. The system calculates the new length by adding two digits to the left of the decimal and one digit to the right of the decimal. Before it inserts new fields to the international field size table, it deletes all existing fields from the table.

5. Verify results by reviewing the International Field Size page.

Select the International Field Size page. The Field Size - International column shows 15.3 for most of its fields. When compared with the Current Field Size, the values in the Field Size - International column should be two digits greater to the left of the decimal and one digit greater to the right of the decimal. In other words, a 13.2 Current Field Size value should correspond to a 15.3 value in the Field Size - International column.

6. Run tools script TLSINST1.SQR to change the field size on PSDBFIELD.

Using SQRW, run tools SQR TLSINST1.SQR to change the field size on the tools table PSDBFIELD. It changes the tools definition values, but not the actual database field size.

It also creates a report TLSINST1.LIS listing all the pages that use Average- or Maximum-sized page fields. As a standard of PeopleSoft Enterprise, all monetary amount fields should 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 has changed to 15.3. Verify the result by randomly checking the field size, opening up various records containing amount fields, such as JRNL_LN, JRNL_HEADER, and VCHR_ACCTG_LINE. As you perform the tasks of creating and building 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. SQL Alter all tables.

- Select PeopleTools, Application Designer, File, New, Project.
- Select File, Save Project As. Save the Project name as CURR_TBL.
- Select Insert, Objects into Project. Select Object Type: ***Record*** and Type: ***Table.***
- Click **Insert;** under **Record Name.** You see a list of all the tables being populated.
- Click **Select All** and click **Insert** again. Then **Close** the page.
- Select Build, Project.
- In the **Build Options** group box, choose Create Indexes and Alter Tables.
- Under Build Execute Options, ensure that Build script file is selected.
- Review the script file with your DBA, and execute it using your recommended SQL query tool.

9. SQL Create all views.

- Select PeopleTools, Application Designer, File, New, Project.
- Select File, Save Project As. Save the Project Name as CURR_VW.
- Select Insert, Objects into Project. Select Object Type: ***Record*** and Type: ***View/Query View.***
- Click Insert and then click Select All.
- Click Insert again, then Close the page.
- Select Build, Project.
- In the **Build Options** group box, choose Create Views.
- Under Build Execute Options, select Build script file.
  - Review the script file with your DBA, and execute it using your recommended SQL query tool.

10. Run Audit scripts again.

Run DDDAudit, Sysaudit again to make sure 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 digit of the decimals is important to you, update the SQR to 12.3 to display three decimals on the report. The following is a list of those reports requiring 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)

Crystal reports and PS/nVision (Excel) reports default to show two decimals. You must configure them to show three decimals, if the last digit of the decimals is important to you.

CHAPTER 4

Working With Languages

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, all you have to do is change the contents of one field, and the system switches 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.

Understanding Language Support in PeopleSoft

PeopleSoft uses several methods to ensure full multi-language capabilities. PeopleTools contains built-in ways of translating all the field labels, page displays, and menu items. When you log in to the system, everything appears in your language of preference, assuming it has been translated.

If you modify PeopleSoft by adding new fields, pages, or menu items, you can use the built-in tools capabilities to translate these into your supported languages.

For more information about the tools PeopleSoft has available for language support, see Overview of PeopleSoft Globalization.

When you modify your application, you need to enter translations of any new items in order to maintain full language capability. If you only use one language and you enter new items in this language, it isn't a problem. However, if you use more than one language and don't translate the new items, they appear only in your original language, even when you've switched to another language. So you may see more than one language on your page.

The translation of objects we deliver is performed once, before our distribution of the system. This includes all of the pages and menu items in the application. However, you must translate new field labels and any data–names, comments, long descriptions, and short descriptions–for each new record you create or data you add.

Setting Language Preferences

PeopleSoft has built-in language preference capabilities. Regardless of your system's base language, you can view your PeopleSoft application in any supported language. There are two ways to set your language of preference:

1. Using the Language Preference page
2. Using the International Preferences page

Using the Language Preference Page

PeopleSoft 8 enables you to view a Foreign Language sign on page for each language supported by the system. Since you are viewing PeopleSoft pages through an Internet browser, you must be sure that the browser accepts the language you want to use. Check the language preferences of your browser to select the correct options.

Once the setup is established, just click the **Language Name** button to view the sign on page in a given language. The language you select here determines the language in which the whole application is displayed in PIA. For the Windows client, the Configuration Manager defines the application language.

The Language Code used in PeopleTools, Maintain Security, Use, My Profile is only applied when running reports and producing emails.

Using the User Profiles - General Page

When you log in, the language preference set in your user ID specifies your language of preference. When the application opens, you see your pages, menus, and data in that language, assuming they're translated. You can use the User Profiles - General page to select a user language preference.

The User Profiles – General page is discussed here only as it relates to setting language preferences. For more information on the full discussion of the User Profiles – General page, see General.

Enter the user's preferred language in the Language Code field. The Language Code entered here determines the language with which you see pages whenever you log in to the system. Your selection here updates the PSOPRDEFN.LANGUAGECD. The next time you log in, you have a new language code.

Select the Multi-Language Enabled check box if you want multiple language capability.

Classes

If you use security classes, you assign language preference users when you assign them to a class. For users not assigned to a class, you set language preference when defining the user.

For more information on setting up users, see Security

Using the International Preferences Page

Once you're logged in to a PeopleSoft application, you can change your language of preference at any time during your session on the International Preferences Page. When you change your language preference, everything shows in your new language, assuming it's translated. The single step of changing language preference signals the system to fully switch to the new language. If you change your language of preference here, the language code change isn't written to the database. It is only stored in PeopleTools memory for the duration of the current logon.

The Language Code you indicate here is the language that the system uses for future pages displayed in the current session. This will be the language of the session until you either log off or change your language preference again. 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, this doesn't affect your User Profile language preference. The next time you log in, you see the language associated with your user ID or security class.

Making a change here means that everything you see–pages, menus, and field contents–all appear in your new language preference.

Your PeopleSoft language selection is independent of your Microsoft Windows language options. If you want to change your Windows language parameters select **Start, Settings, Control Page.**

For more information on the Regional Settings Properties page, see your Microsoft documentation.

Working With Double-Byte Characters

PeopleSoft HRMS uses an Alternate Character architecture and a related language table architecture to enable users to use both alphanumeric and double-byte character sets to enter data and enable users to switch between a base and related language table to view information in either alphanumeric or double-byte characters.

You can use PeopleSoft's flexible Alternate Character architecture to accommodate languages such as Japanese that require entry of proper nouns using two-character sets to support phonetic as opposed to binary proper noun sorting. Users entering data in Japanese, for example, require functionality that gives them the flexibility to enter proper nouns such as names or descriptions in both Kanji and using a phonetic double-byte character set, such as Zenkaku Katakana. To accomplish phonetic sorting in PeopleSoft HRMS, you can configure your system to enable users to enter Japanese proper nouns twice: once in double-byte Kanji, and once phonetically, using Katakana or Hiragana.

Important! For Japanese users, it is important to determine a consistent method for entering phonetic character set information. The system applies a binary sort method to double-byte characters, and different characters with the same pronunciation don't sort together in PeopleSoft HRMS. For example, a Hiragana "Ma" character would sort before a Hiragana "Mi" character, and after a Hiragana "No" character. If a Katakana "Ma" character were included in the sort, it would be sorted after a Katakana "Mi" character, and would appear only after all the Hiragana characters have been exhausted.

For more information on related language architecture in PeopleSoft applications and other information on globalization techniques and processes supported by PeopleTools, see Globalization.

Configuring Your System for Alternate Character Functionality

Before you can enter double-byte characters in PeopleSoft HRMS and implement Alternate Character functionality, you must be using a Japanese enabled database and double-byte enabled operating system. If you aren't working on a double-byte character set enabled operating system, then the PeopleSoft Human Resources system can't validate double-byte characters in the Alternate Character fields.

To set up Alternate Character functionality in PeopleSoft HRMS:

1. Link alternate character sets with Language Codes on the Alternate Character page.

   These settings affect your entire PeopleSoft HRMS installation.

2. Enable alternate character functionality for specific User IDs using the Primary Permission List Preferences page.

   When you enable Alternate Character functionality for a particular user, the system displays a button to the right of all fields in the system in the Global menus with an associated Alternate Character field.

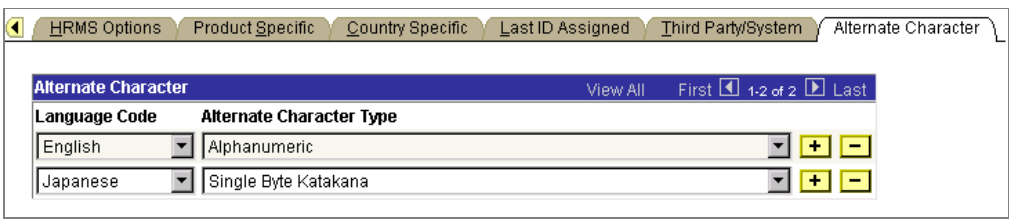
Alternate Character push button

   When you click the button, the system opens a page where you enter or display the field value in the Alternate Character set.

For more information on setting system defaults for User IDs and working with the Primary Permission List Preferences page, see Setting Up Primary Permission List Preferences.

Installation Table - Alternate Character Page

Usage	Use the Alternate Character page to define the alternate character types the system will use for a particular language code.
Object Name	ALT_CHAR_TBL
Navigation	**Define Business Rules, Define General Options, Setup, Installation Table, Alternate Character**
Prerequisites	Complete the prior pages in this component.
Access Requirements	None



Installation Table - Alternate Character page

Language Code Select the **Language Code** for each language that users would use to make an alternate character entry in an alternate character field.

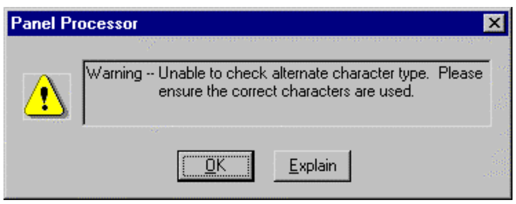
Alternate Character Type Set the **Alternate Character Type** to one of the following options:

Because you are making this setting on the Installation Table, you're affecting your entire HRMS application configuration. Make sure that you account for all Language Codes for your installation.

Alternate Character Type	***Description***
Alphanumeric	Validates entries of alphanumeric characters, like A, B, C, and I, 2, 3, as the alternate characters for a designated field.

Alphanumeric and Latin 1-ext	Validates entries of alphanumeric characters, like A, B, C, and I, 2, 3, as the alternate characters for a designated field, *including* characters with accents.
Any	Validates entries of any single or double-byte characters into the alternate character field.
DB Any Characters (Kanji)	Validates entries of any double-byte characters, but no alphanumeric characters, into the alternate character field.
Double-Byte Hiragana	Validates entries of double-byte Hiragana characters into the alternate character field.
Double-Byte Katakana	Validates entries of double-byte Katakana characters into the alternate character field.
Single Byte Katakana	Validates entries of single-byte Katakana characters into the alternate character field.

If you don't specify an Alternate Character Type for a Language Code with which a user is working, and the user attempts to enter any characters in the alternate character fields, the system issues the following warning message.



Page Processor warning message

If you've specified an Alternate Character Type for a Language Code, and a user enters any other character type in the Alternate Character fields, the system issues the following warning message:

```
The field can only contain <Alternate Character Type> characters.
```

While you can ignore the warning message and enter the data in another character set, because of the problems with sorting multiple alternate character set data, we recommend that you work with a consistent alternate character type.

For more information about using the Installation Table pages, see Installation Table - Products Page.

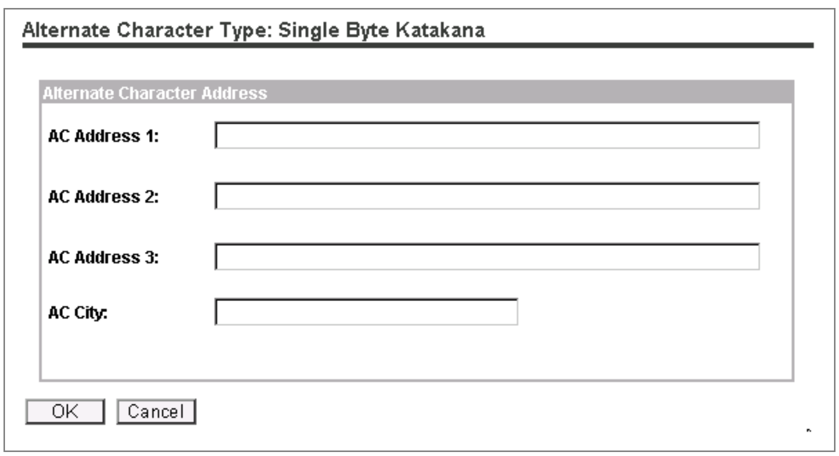
Entering Alternate Character Information

You can access the alternate character fields for proper noun fields like Name, City, or Company Description on pages in the Global menus in PeopleSoft Human Resources.

You can access the alternate character fields on the global pages by clicking the **Alternate Character** button when it displays to the right of any field with a corresponding alternate character field available.

In the Name page, when the Format for Country is JPN, the Name and the Alternate Character Name fields show up on the page, and you can enter information in both fields directly in the Name page. In the Address page, you access the alternate character format through a button. Whether the **Alternate Character** button appears on the Address page depends on the particular page and whether the Format for Country is set to JPN.

If you click the **Alternate Character Address** button in the **Personal Data--Address** group box, the system opens the alternate character Address page, where you can enter any proper noun information, such as street and city, in the designated alternate character format.



Alternate Character Address page

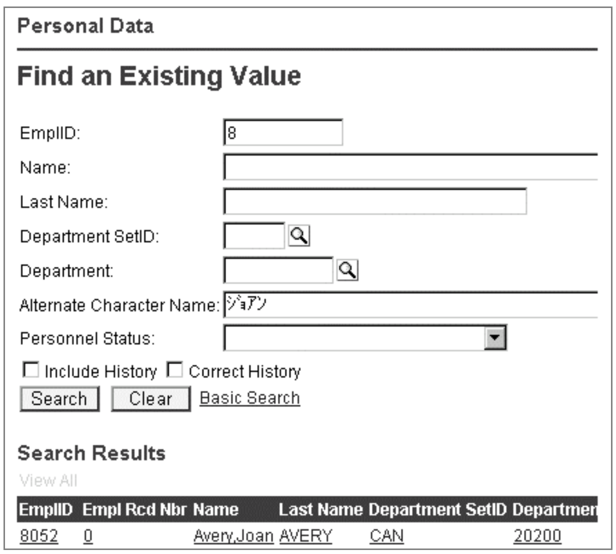
The system displays the Alternate Character Type specified for the alternate character field in the page title bar.

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 gives you several options for finding an employee and either updating or adding information to their records in the system. If you are entering names in your human resources system using phonetic alternate character sets, you can search for specific records by entering either Kanji or Katakana in a separate Alternate Character name search criteria field that is part of the search record dialog. In other words, if you are working with a Japanese enabled system, you have the option to enter a Japanese name phonetically as a search criteria.

For example, to update Japanese employee Noriko Kawamoto's Personal Data record, you would position the cursor in the Alternate Character Name field, enter the Japanese phonetic characters for "Kawamoto," and click *Enter.* The list box in the search record page displays all names beginning with "Kawamoto" in both Kanji and Kana for the Japanese names in the system, sorted phonetically.



Personal Data search page with Alternate Character Name Search

For non-Japanese users, the phonetic value is the same as the base name value.

Overview of Alternate Character System Architecture

For certain names, addresses, and description fields in the PeopleSoft Human Resources system, there is a corresponding alternate character field that is part of the record. For example, NAME and NAME_AC reside in the PERSONAL_DATA record and the related language table, PERS_DATA_LANG. This architecture allows the same field to be used differently for different language codes.

Alternate Character Pages Associated With Global Pages

The following table lists the alternate character pages and the global pages with which they are associated in PeopleSoft HRMS.

Pages	***Secondary Pages***	***Fields***	***Comments***
COMPANY_TABLE1	COMPANY_ACDESCR_SEC	DESCR_AC	
COMPANY_TABLE1	COMPANY_ACADDR_SEC	COMPANY_ACADDR_SBP	COMPANY_TBL.CITY_AC COMPANY_TBL.ADDRESS1_AC COMPANY_TBL.ADDRESS2_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 ADDR_POS_JPN_SEC

HS_NON_EMPL1	HS_NE_ACNAME_SEC	NAME_AC	
PERSONAL_DATA1 APP_PERSONAL_DATA1	PERSDTA_ACADDR_SEC	PERSDTA_ACADDR_SBP	PERS_DATA_EFFDT.CITY_AC PERS_DATA_EFFDT.ADDRESS1_AC PERS_DATA_EFFDT.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
PERSONAL_DATA1 APP_PERSONAL_DATA1	PERSDTA_ACNAME_SEC	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 Human Resources search records that have A(lternate) C(haracter) Name (NAME_AC) as an alternate search key, or subrecords that are included in search records, allow for Japanese input and display.

This list includes only human resources system records.

Records
APPLICANT_GBL
APPL_SRCH_GBL
ASGN_CMP_SCH_JP

ASGN_CMP_SRCH
CAREERPLAN_SRCH
CAREERPLN_SC_JP
CAREER_ADD_SRCH
CAREER_ADD_S_JP
CAR_PLAN_SRCH
CM_SRCH_MATCH
CNT_APPSRCH_GBL
CNT_APPSRCH_JPN
CNT_SRCH_GBL
CNT_SRCH_JPN
EMPLMT_SRCH_GBL
EMPLMT_SRCH_NLD
EMPL_COMP_SRCH
EMPL_DEPT_SRCH
HS_NE_PERS_SRCH
HS_PERS_SRCH
INTERVW_SRCH
NE_INCIDNT_SRCH
NE_PERSONAL_DTA
NE_STUDENT_SRCH
PERSONAL_DATA
PERS_SRCH_GBL
PHYSICIAN_SRCH2
SUCCESSION_SRCH
SUCCESS_EM_SRCH
SUCCESS_TR_SRCH
TRAIN_HIST_SRCH
TRAIN_HIST_S_JP
TRN_DMNDEE_SRCH
TRN_INSTRCT_VW
TRN_INSTR_SRCH

PeopleSoft Human Resources Reports That Sort on Alternate Character Name

The following reports in PeopleSoft Human Resources sort on the Name field or on the Alternate Character Name field when the system base language and report language are configured as follows:

Base Language is set to	***Report Language is set to***	***System sorts report by***
English	Japanese	RELLANG.NAME_AC
Japanese	Japanese	BASE.NAME_AC
English	English	BASE.NAME
Japanese	English	RELLANG.NAME

SQR/Crystal

These SQR/Crystal reports sort phonetically for Japanese, based on the your report and base language configuration:

Report ID	***Description***
PER001	Department Action Notices
PER002	Employee Birthdays
PER004	Emergency Contacts
PER005	Employees on Leaves of Absence
PER007	Temporary Employees
PER008	Employee Review Audit
PER009	Union Membership
PER011	Company Skills Inventory
PER012	Departmental Salaries
PER013	Employee Compensation Changes
PER020	Employee Home Address Listing
PER023	Salary History
PER030	Job Group Roster
CMP003	Compa-ratio Analysis by Grade and Job
CMP004	Below-Minimum Analysis
CMP005	Above-Maximum Analysis

This list doesn't include country-specific regulatory reports that sort by Name.

PeopleSoft Human Resources Reports Supporting Japanese Name Formatting

These reports display space-delimited Japanese names when the report is run with Japanese as either the report language or the system base language:

Report ID	***Description***
APP005	Candidate Listing
APP009	Interview Schedule
APP008	Skills Matching
APP010	Search Requirements
CMP003	Compa-ratio Analysis by Grade and Job
CMP004	Below-Minimum Analysis
CMP005	Above-Maximum Analysis
PER001	Department Action Notices
PER002	Employee Birthdays
PER003	Years of Service
PER004	Emergency Contacts
PER007	Temporary Employees
PER008	Employee Review Audit
PER009	Union Membership
PER011	Company Skills Inventory
PER012	Department Salaries
PER013	Employee Compensation Changes
PER014	Absence History
PER015	Personnel Actions History
PER020	Employee Home Address Listing
PER021	Pending Future Actions
PER023	Salary History
PER030	Job Group Roster
PER032	Passport/Visa Expiration
PER033	Citizenship Status/Country Citizenship/ Visa Audit

PER034	Internal Resumes
POS003	Incumbent Position History
POS006	Indented Position Organizational Chart

CHAPTER 5

Setting Up Control Tables

How do you enable HRMS users in your organization to get to the same basic information, at the same time, yet maintain data accuracy and integrity? With PeopleSoft Human Resources, it's easy. You maintain critical general data, such as companies, work locations, and system specifications, in a central spot in PeopleSoft Human Resources. That way, when users perform tasks for any HRMS function, they use exactly the same general information. You eliminate duplicate entries and keep the data virtually error-free. By setting up this control table data in advance, you make the data available to users of all your PeopleSoft HRMS applications. This saves users a great deal of time and prevents data entry errors.

What's more, you aren't locked into the information you set up now. Using effective dates, you can update information anytime, yet maintain a record of historical information to track changes over time. You can even enter information before it takes effect to prepare for changes in advance–no last-minute rushes.

In this section, we discuss the different ways you can run PeopleSoft Human Resources and help you decide which way you'll use them: You either focus on the employees in your company or on the positions they hold. The method you choose depends on the needs of your company and whether your organizational structure tends to be fluid or static. You also learn how to set up data that serves as the foundation of your organization's human resource system, such as identifying the different companies within your organization and different units and locations within each company. These tables are the basis not only for PeopleSoft Human Resources, but all your PeopleSoft HRMS applications.

Before You Begin

The procedures for accessing and entering information in these tables mirror those for updating any PeopleSoft table or page.

For more information and a quick refresher course, see the general tutorial in Using PeopleSoft 8 Applications.

Remember that you can access PeopleBooks Help and review online topics that describe the purpose of these tables.

Setting Up Business Unit and SetID Functionality

If your enterprise is using the Business Unit/SetID feature in PeopleSoft HRMS, regardless of your local or global functionality, you must define Business Units and set up TableSet Sharing options.

For more information on setting up Business Unit and SetID functionality in PeopleSoft HRMS, see Regulating HRMS System Data.

Understanding Effective Dates

In many of the control tables and other tables in PeopleSoft Human Resources, you must set the Effective Date to indicate when you want the data to go into effect.

This requirement serves two important purposes:

- It enables you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With all this information at your fingertips, you can roll back your system to a particular time to perform analyses for your company. Or you can roll forward and set up tables and data ahead of time: You don't need a tickler or pending file to remember to enter data in the future.
- The system uses effective dates to compare pages and tables to make sure that the prompt tables you see list only data that is valid as of the effective date of the page in which you're working. For example, let's say you create a new department code with an effective date of May 1, 1998. If in the Job Data pages you enter a new data row for an employee, or update an existing row, that has an effective date before May 1, 1998, then when you select a Department, you won't see the new code as a valid choice because it isn't in effect yet.

Driving Your System by Employee or Position

PeopleSoft Human Resources enables you to drive your system in two ways: by position or by employee. Before you begin setting up default general information, you must decide which method you are going to use. You set up some information differently in the tables because the way the system processes the information varies depending on which method you use.

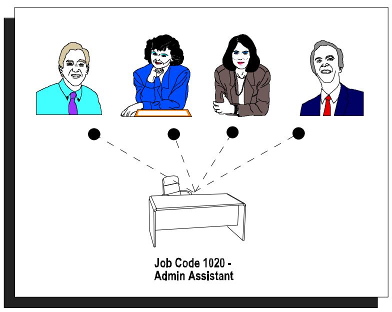
What's the Difference?

When you drive PeopleSoft Human Resources by employee, you use job codes to classify job data into groups. You then use those job codes to link employee data with job data. When you drive PeopleSoft Human Resources by position, you still use job codes to create general groupings or job classifications in your organization, such as EEO and salary survey data, but you also uniquely identify each position within a job code and link employees with those positions.

Job codes are very different from positions: Within a single job code, you can have several positions. For example, within job code 1020, Administrative Assistant, you could define different Administrative Assistant positions, with different position numbers, such as one in your Marketing Department, one in Research, and one in your Compensation group.

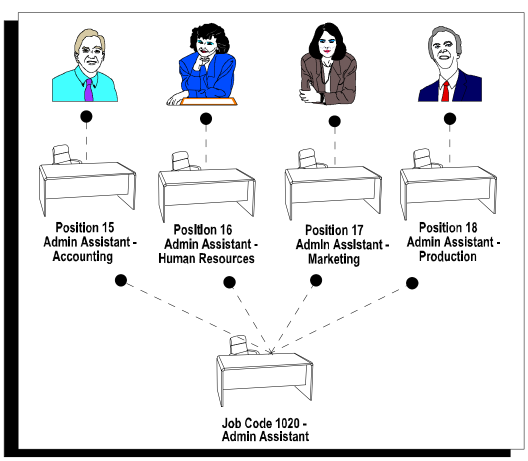
You use positions to track details of a particular job in a particular department or location. Positions usually have a one-to-one relationship with employees. In contrast, job codes primarily have a one-to-many relationship with employees. Usually several people are employed in the same job code classification.

When you drive your HR system by employee, you get broader information on jobs in your organization. You use job codes to group jobs into general classifications, so employees and job codes have a one-to-many relationship. Thus, many employees share the same job code, even though they might perform the work in different departments, locations, or companies. You identify the job an employee performs through the data you enter in the employee records.



Driving PeopleSoft Human Resources by Employee

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



Driving PeopleSoft Human Resources by Position

In a position-driven HR system, employees and positions usually have a one-to-one relationship. Each position has a set of characteristics that uniquely identify it, and employees most often fill only one position.

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 very differently according to whether you drive it by employee or position. And that affects how and where you enter and maintain data on jobs (or positions) and employees.

Which Method Should You Use?

If your organization is fluid–if you tend to look at broader groupings of employees and create new jobs often–then you'll probably find that driving the system by employee is best for you. This method is useful if your organization is ever expanding, or if you have new projects that require you to create new jobs or job types regularly.

If your organization is fairly static–if jobs and job descriptions are mostly fixed and people move in and out of them–then you'll probably find that driving the system by position is most effective for you. For example, government agencies and hospitals, which plan positions based on budgets, often well in advance of filling them, find this method very useful.

If you find that both methods serve you well in different areas of your organization, you can choose to drive PeopleSoft Human Resources both ways. For example, you might find that driving the system by position serves well for only some departments or management levels in your company, and that driving the system by employee works well for others. PeopleSoft Human Resources gives you the flexibility to use both: You can select a setting called partial position management to use both methods wherever they suit you best.

This decision doesn't affect your PeopleSoft payroll system. No matter which method you use, using PeopleSoft Payroll for North America or PeopleSoft Global Payroll isn't a problem.

For more information on positions, see Setting Up Positions. For more information about employee processing, see Hiring Your Workforce.

PeopleSoft Pension Administration, Payroll, and Benefits Considerations

If you use PeopleSoft Pension Administration, you track your pension payees–retirees, beneficiaries, and QDRO alternate payees–using the same tables you use to track your employees. You want to drive your retiree organization by employee (or in this case, by payee), rather than by position. After all, you don't want to have to establish different positions for each payee in the system. If you want to drive your employee organization by position and your payee organization by employee, use the partial position management option. This is true for organizations using PeopleSoft Global Payroll and PeopleSoft Payroll for North America. If your organization is using PeopleSoft Benefits or PeopleSoft Benefits Administration, you can set up your Position Management options using either full or partial position management.

Administering Country Codes

In many pages throughout PeopleSoft Human Resources, a country appears as part of an 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. When you encounter a country field on a page, the system displays a default Country Code, which you specify in the Installation Table and which you can change. The Country Code default on system pages can also be impacted by the Primary Permission List Preferences and the HR Business Unit Defaults page. You can define what information users should capture for addresses in specific countries using the second page in the Country Table component, Address Format.

For more information on the Primary Permission List Preferences and HR Business Unit Defaults pages, see Regulating HRMS System Data.

You need codes for all the countries where your organization does business and where your employees live. We deliver the Country Description page with an extensive list of countries and codes already defined. And, if necessary, we update the page with each release of PeopleSoft Human Resources according to the countries recognized by the International Standards Organization (ISO) at that time.

But in our rapidly changing global environment, it is sometimes difficult for us to stay on top of all the changes. As a result, you might have to add a Country Code for some reason. If you do, please notify your PeopleSoft account manager, so that we can add that code to the Country Table (COUNTRY_TBL) for the next release of PeopleSoft Human Resources.

To determine which countries are already listed in the Country Table, you can run the Country Table report (PER708).

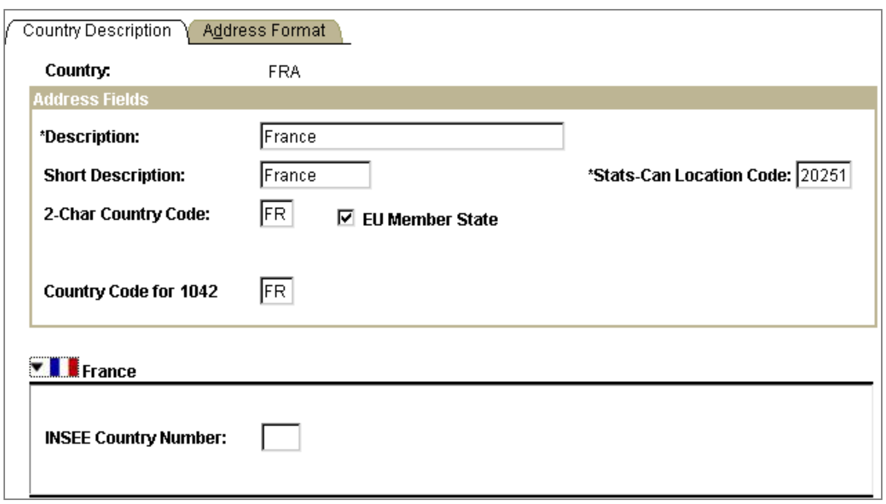
Enterprise Integration Point (EIP) Related to the Country Table

The Country Table EIP synchronizes Country Codes and address data to external systems. When you add, delete, or change country information in the PS_COUNTRY_TBL record (of the Country Table), the system automatically publishes the Country Table EIP message to any third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the PS_COUNTRY_TBL record on the Country Table.

For more information regarding the subscribers and technical details of the Country Table EIP, see Country Table. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

Country Table - Country Description Page

Usage	Use the Country Description page to view or update country information.
Object Name	COUNTRY_DEFN
Navigation	**Define Business Rules, Define General Options, Setup, Country Table, Country Description**
Prerequisites	None
Access Requirements	Country



Country Table - Country Description page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Country, Description, Short Description.**

2-Char (Character) Country Code	Enter the **2-Char Country Code** that the U.S. government assigned to the country, if applicable.

EU (European Union) Member State Indicate if this is an **EU Member State.** This field is for informational purposes only and doesn't impact system processing or reporting.

Stats-Can (statistics canada) Location Code Displays the Statistics Canada country location code, which is used on the FRA INSEE Table Page and Canada Academic Teaching Survey reports. PeopleSoft delivers this table with the Stats-Can Location Code entered. PeopleSoft won't maintain this information.

This field is intended for Canadian higher education degree-granting institutions only.

Country Code for 1042 Enter the country code for non-resident alien processing.

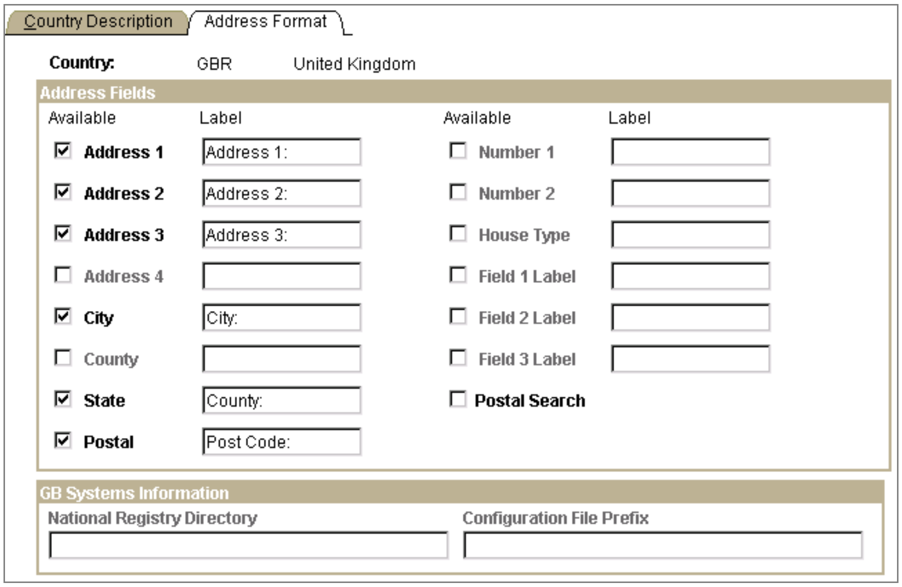
France

INSEE Country Number (national institute for statistical and economic studies) INSEE is an official statistics and economics organization in France. This organization issues a number (SIRET) used by the tax authorities, social security, the Chamber of Commerce, and others, to identify an enterprise and its entities.

INSEE values are maintained on the FRA INSEE Table Page.

Country Table - Address Format Page

Usage	Use the Address Format page to specify the address format for the country selected from the Country Table
Object Name	ADDR_FORMAT_TABLE
Navigation	**Define Business Rules, Define General Options, Setup, Country Table, Address Format**
Prerequisites	None
Access Requirements	Country



Country Table - Address Format page

Because addresses are formatted differently around the globe, the address functionality in PeopleSoft Human Resources enables you to configure the address information requirements for different countries. You can also modify the corresponding label for each piece of address information. Standardizing the address formatting for each country in your system improves the quality of your data and makes user data entry easier and faster.

Country You use the options that you choose on Address Format to specify how the system should construct address pages throughout PeopleSoft HRMS. The standardized address page that you create for a **Country** is used on transaction pages throughout the system. As a matter of convention, the Country Code is always used as the first field in the address page. When you select a country from the list of valid values, the system dynamically changes the address format to the standard format for that country.

Available To format the standard address page for this country, select the appropriate check boxes in the **Available** column. Select the **Available** check box to activate the corresponding address field and its **Label** for inclusion as part of the standard address format for this country.

Label Select the **Available** check box to activate the corresponding address field and its **Label** for inclusion as part of the standard address format for this country. The system displays the text that you enter in the **Label** field for an activated address field as the field label on the address page for this country.

Postal Search To activate Postal Searching functionality for Dutch, Japanese, or UK addresses, select the **Postal Search** check box. For the UK, when you select this check box the system makes the fields in the **GB Systems Information** group box available for entry.

GB Systems Information

The system only displays the **GB Systems Information** group box for UK addresses (**Country** is GBR). Complete these fields if you have the Information Management Toolkit (IMTK) installed and configured. With this GB Information Management application installed, you can look up UK addresses by entering a postcode and, optionally, a house name or number.

National Registry Directory Enter the location of the data files containing the postcode information.

Configuration File Prefix Enter the location of the PeopleSoft supplied configuration file (PS_GBSYS.INI) in this field.

For more information about installing and configuring IMTK with PeopleSoft Human Resources, see the HRMS Installation Guide and the *Information Management Toolkit User Guide*.

Enterprise Integration Points (EIP) Related to the State or Province Table

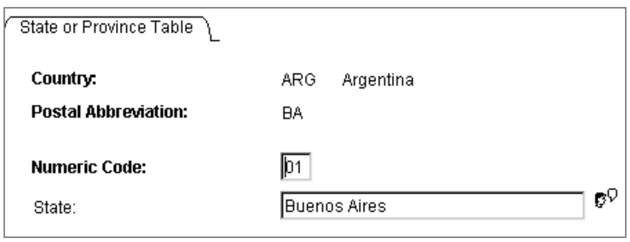
When you add, delete, or change information in the State or Province Table records, the system automatically publishes the State Table EIP message to any other PeopleSoft or third-party application that subscribes to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the State table records.

For more information regarding the subscribers and technical details of the State Table EIP, see State Table. For more information about PeopleSoft Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

State or Province Table Page

Usage	PeopleSoft delivers the State or 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. We update the State or Province table for our supported countries with each release of the system. If you need to add a State, province, or equivalent code, use the State or Province Table page to enter the code you need.
Object Name	STATE_NAMES_TABLE
Navigation	**Define Business Rules, Define General Options, Setup, State or Province Table, State or Province Table**
Prerequisites	None
Access Requirements	Enter a Country and State.



State or Province Table page

You need these state or province codes for all countries where your organization does business. You use this information in many address fields throughout the system, such as the Location and Department Tables and Personal Data for all employees residing in the supported local countries.

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Country, Prefecture, State, Province.**

Postal Abbreviation	The system displays the **Postal Abbreviation** for the state or province code.
Numeric Code	Enter the **Numeric Code,** if applicable. The U.S. federal government assigns a Numeric Code to each U.S. state for reporting purposes. You don't need to enter Numeric Codes for new Canadian provinces.

For more information on specifying an address format for a country, see Country Table - Address Format Page.

Setting Up Implementation Defaults

For every 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, and this information is *required.*

You also must fill out the Primary Permission List Preferences page for each of your Primary Permission Lists. Most defaulting in PeopleSoft HRMS comes first from the Primary Permission List Preferences page and not the Installation Table pages. In other PeopleSoft HRMS applications, there are defaults that still reference the Installation Table settings. In PeopleSoft Human Resources, however, all defaults in the system are based on the settings that you make in the Primary Permission List Preferences page. There are some exceptions to this rule in PeopleSoft Human Resources, and they are noted in the default field level discussion.

The Installation Table contains six pages that you use to make installation choices for your PeopleSoft HRMS system. If you're using the Organization Charting Interface in PeopleSoft Human Resources, you make additional settings on the Installation Table - Third Party page.

When you access the Installation Table for the first time, you see that PeopleSoft has already entered information for a sample company that you can use as a guide. After you enter your installation information, you must exit and re-enter PeopleSoft so the system can pick up your changes.

If you're using the Organization Charting Interface in PeopleSoft Human Resources, you'll make additional settings on the Installation Table - Third Party/System page.

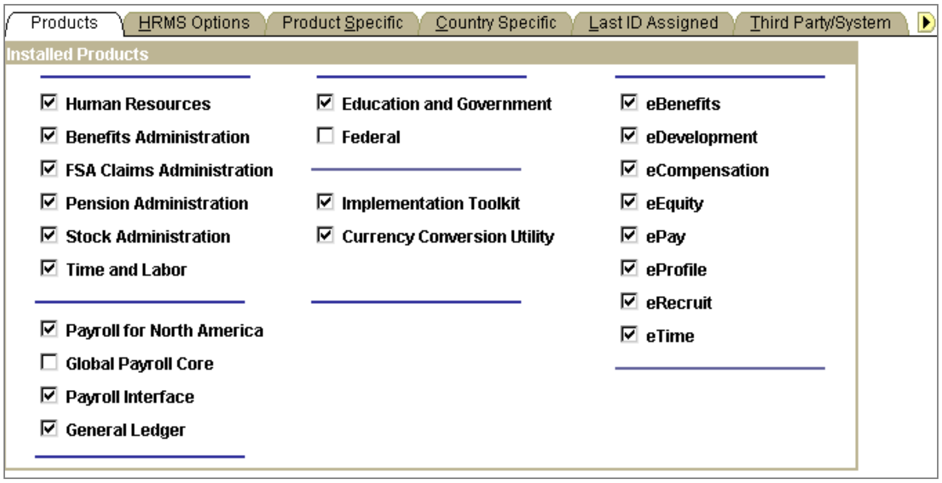
For more information on the Organization Charting Interface and Third Party settings, see Building Organization Charts.

Once you complete these pages, you can print the Installation Table report (PER702), which lists the defaults you define.

Installation Table - Products Page

Usage	In the Products page you'll indicate the PeopleSoft Applications you're using as part of your installation.
Object Name	INSTALLATION_TBL1
Navigation	**Define Business Rules, Define General Options, Setup, Installation Table, Products**
Prerequisites	None

Access Requirements	None



Installation Table - Products page

For more information on using Position Management in PeopleSoft Human Resources, see Driving Your System by Employee or Position.

Human Resources Select **Human Resources** if you are implementing PeopleSoft Human Resources.

Benefits Administration To process open enrollments and event maintenance with PeopleSoft Benefits Administration, select **Benefits Administration.**

FSA Claims Administration Select **FSA Claims Administration,** if you want to activate FSA claims processing capabilities in PeopleSoft FSA Administration.

Pension Administration Select **Pension Administration** if you are implementing PeopleSoft Pension Administration.

Stock Administration Select **Stock Administration** if you are implementing PeopleSoft Stock Administration.

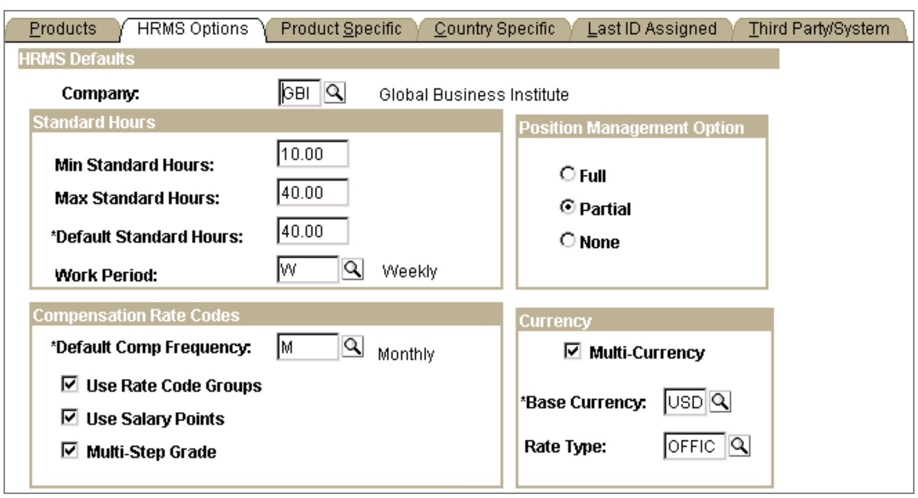
Time and Labor Select **Time and Labor** if you are implementing PeopleSoft Time and Labor.

Payroll for North America **Global Payroll Core**	Select the type of PeopleSoft payroll system to be used, either PeopleSoft Global Payroll or PeopleSoft North American Payroll. The system uses the default payroll system that you indicate here only if there is no default payroll system specified on the Primary Permission List Preferences page. The system checks the Primary Permission List Preferences page settings first, and if there is no payroll setting, it looks at the Installation Table. If you're not using a PeopleSoft payroll system, don't select either option. Based upon the installation indicated, the system adjusts the Pay Group field to the correct size for the application selected.
Payroll Interface	Select **Payroll Interface** if you are implementing PeopleSoft Payroll Interface.
General Ledger	Select General Ledger if you are implementing PeopleSoft Financials.
Education and Government	PeopleSoft 8.0 Human Resources includes significant functionality designed to meet the special needs of education and government agencies and organizations. Select **Education and Government** to run these processes.
Federal	PeopleSoft 8.0 Human Resources includes significant functionality designed to meet the special needs of Federal agencies and organizations. Select **Federal** to run these processes.
Implementation Toolkit	Select the **Implementation Toolkit** if you are implementing this PeopleSoft application.
Currency Conversion Utility	Select **Currency Conversion Utility** if you are implementing this PeopleSoft application.
eBenefits	Select **eBenefits** if you are implementing this PeopleSoft HRMS application.
eDevelopment	Select **eDevelopment** if you are implementing this PeopleSoft HRMS application.
eCompensation	Select **eCompensation** if you are implementing this PeopleSoft HRMS application.
eEquity	Select **eEquity** if you are implementing this PeopleSoft HRMS application.
ePay	Select **ePay** if you are implementing this PeopleSoft HRMS application.

eProfile	Select **eProfile** if you are implementing this PeopleSoft HRMS application.
eRecruit	Select **eRecruit** if you are implementing this PeopleSoft HRMS application.
eTime	Select **eTime** if you are implementing this PeopleSoft HRMS application.

Installation Table - HRMS Options Page

Usage	In the HRMS Options page, you specify how to drive your system: by employee, by position, or both. You also enter PeopleSoft HRMS defaults related to your organizational policies. For example, you identify the standard hours employees work each week, or whether multiple companies comprise your organization.
Object Name	INSTALLATION_TBL1B
Navigation	**Define Business Rules, Define General Options, Setup, Installation Table, HRMS Options**
Prerequisites	None
Access Requirements	None



Installation Table - HRMS Options page

HRMS Defaults

Company

Select a default **Company** code. The system uses this default **Company** code as the default that appears in several other tables in PeopleSoft HRMS.

For a single-company organization, enter the code of your only company as the default **Company;** for multi-company environments, you should determine which company is most appropriate.

Standard Hours

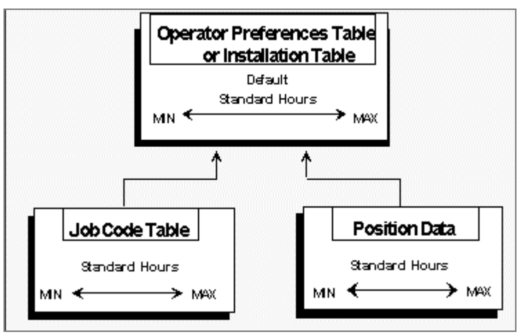
If you're using PeopleSoft Global Payroll and want to use this functionality to control payroll input, you must review your payroll and make sure you have elements referencing the appropriate PeopleSoft Human Resources items. The system won't use them automatically.

Min Standard Hours

Enter the minimum standard hours employees are expected to work per week.

Max Standard Hours

Enter the maximum standard hours employees are expected to work per week.



Minimum and Maximum Standard Hours

For more information on position data, see Setting Up Positions. We discuss job codes later in this section.

Default Standard Hours	Enter the number of hours in a normal work week at the Company. This is a required field. When you define new Primary Permission List Preferences for a Primary Permission List, the Primary Permission List Preferences page defaults in the Standard Hours from the Installation Table. The value you enter also becomes the default standard hours for a job in the Job Code Table, and the default for the standard hours for the Salary Administration Table. If you're driving your system by positions, the hours in the Salary Administration plan of the position's location or the hours in the Job Code Table default to the Position Data pages. PeopleSoft Human Resources uses standard hours to compute a full-time equivalent (FTE) to prorate holiday hours and pay for part-time and hourly employees. To compute the FTE value, the system first checks Position Data to see if standard hours are specified. If they aren't, the system uses the standard hours in the Job Code Table.
Work Period	Select a standard work period. The standard **Work Period** is the time period in which employees must complete the Standard Hours. Valid 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 (full-time equivalency).

For more information about Standard **Work Period** defaulting, see Defaulting of Standard Hours and Standard Work Period.

Positions Management Option

The **Position Management Option** defaults to ***None.*** If you want to drive part or all of the system by position, change the setting.

Note. Using position management substantially alters the way the system processes your data and you maintain data differently.

For more information to help you decide whether or not to use positions to drive PeopleSoft Human Resources, see Driving Your System by Employee or Position.

If you use PeopleSoft Pension Administration, you shouldn't use position management for your retiree organization. So if you use position management for your employees, you should choose ***Partial*** rather than ***Full*** to exclude your retiree departments.

Full. The system expects that you track position data for all employees in your organization, and that you always drive your human resource system by position rather than by employee.

Partial. The system uses whatever position data is available, but doesn't require that you track your entire organization using position management. Set position management to ***Partial*** when you want to use the module on a trial basis or for selected departments in your organization.

None. You drive your system by employee. You can still assign position numbers to employees, but the system doesn't use the data associated with these positions for employee records, such as Work Phone or Mail Stop ID. You simply tie an employee to a position. You might find this helpful when you want to track only certain positions, such as those above a particular management level.

Compensation Rate Codes

Default Comp (Compensation) Frequency

For the **Default Comp 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. Valid values are in the Frequency Table.

Use Rate Code Groups	Select **Use Rate Code Groups** if your organization bundles rate codes to apply percentages when calculating compensation.
Use Salary Points	Select **Use Salary Points** if your organization uses rate codes that have the rate code type of Points.
Multi-Step Grade	Select **Multi-Step Grade** if your organization uses a multi-step/grade salary plan. This causes the system to use the Salary Step Table to determine employee compensation rates.

For more information on setting up Salary Steps in PeopleSoft Human Resources, see Planning Salaries

Currency

Multi-Currency	Select **Multi-Currency** if you use different types of currency to pay employees. This option only affects PeopleSoft North American Payroll. PeopleSoft Global Payroll uses a separate multi-currency within the payroll system.

Note. Turn on the **Multi-Currency** option on the PeopleTools Options page.

Base Currency	Select a Currency Code to use as your **Base Currency** from the values in the Currency Code Table. The code you select here is the default currency the system uses to calculate compa-ratios (or percent through range calculations) and all total amounts on pages and reports for PeopleSoft Human Resources and PeopleSoft North American Payroll, regardless of the currency used for individual line items. For example, if U.S. dollars is your base currency, but your global sales people 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 then displaying the total in U.S. dollars.

Note. All currency defaults throughout your PeopleSoft Human Resources system are established based on the Base Currency you indicate on the Installation Table page, not the Primary Permission List Preferences page. Primary Permission List Preferences doesn't affect currency defaulting in the local country pages.

Rate Type

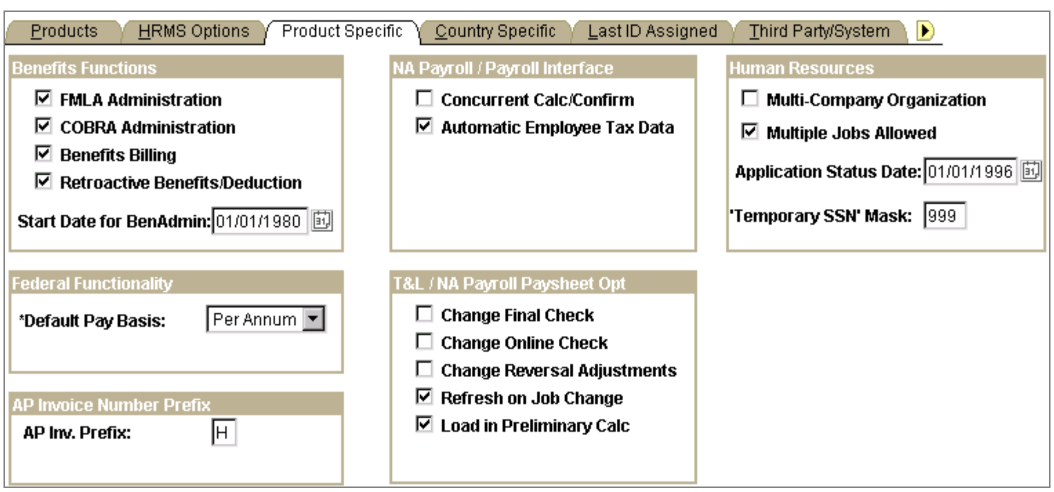
Select a **Rate Type** to identify the default rate type on which your currency conversion will be based, only if you haven't specified a default rate type for an Primary Permission List on the Primary Permission List Preferences page. The system checks the Primary Permission List Preferences for a default rate type first, and if none is specified, it looks at the Rate Type that you specify on the Installation Table. You define rate types on the Currency Rate Type Table.

Examples include ***Commercial, Financial, Floating,*** and ***Official rates.***

For more information on Multiple Currency Functionality in general, and the Currency Code and Currency Rate Type Tables, see Working with Currencies.

Installation Table - Product Specific Page

Usage	Use this page to enter product- and industry-specific installation information.
Object Name	INSTALLATION_TBL1A
Navigation	**Define Business Rules, Define General Options, Setup, Installation Table, Product Specific**
Prerequisites	None
Access Requirements	None



Installation Table - Product Specific page

Benefits Functions

FMLA Administration Select this check box to activate FMLA Administration benefits functionality.

COBRA Administration Select this check box to activate COBRA Administration benefits functionality.

Benefits Billing Select this check box to activate Benefits Billing benefits functionality.

Retroactive Benefits / Deductions Select this check box to activate Retroactive Benefits and Deductions benefits functionality.

Start Date for BenAdmin (Benefit Administration) Enter the **Start Date for BenAdmin** in PeopleSoft date format: MM/DD/YYY.

For more information on the Benefits Administration Start Date, see PeopleSoft 8 Benefits Administration, “Introduction to PeopleSoft Benefits Administration”

N.A. (North American) Payroll and Payroll Interface

Concurrent Calc (Calculation) /Confirm (Confirmation) Select this check box to enable the system to run a calculation and confirmation at the same time. However, there is the possibility that an employee could be in two runs running concurrently. This could cause a dead lock situation where the process abends.

Automatic Employee Tax Data If you select this option on the Installation Table - Products page, the system creates 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.

An employee transfers to a new company.

Human Resources

Multi-Company Organization — Select **Multi-Company Organization** if more than one company comprises your organization. If you use PeopleSoft Pension Administration, you set up companies specifically to house your pension payees, so you need to select this option.

Multiple Jobs Allowed — Select **Multiple Jobs Allowed** to set up multiple, concurrent jobs for employees in your organization. For example, you might use this option if you work for a university where the dean of the Marketing Department is also a professor. Hospitals also often implement multiple jobs.

Application Status Date — Enter the **Application Status Date.**

'Temporary SSN (Social Security Number)' Mask — The 3-digit number you type in the **' Temporary SSN' Mask** field is the default Social Security Number of all applicants or employees whose Social Security Numbers are unavailable. You should assign a value greater than 800 so the temporary number doesn't conflict with valid Social Security Numbers. This field defaults to 999.

Federal Functionality

Default Pay Basis — For the **Default Pay Basis** and Default Compensation Frequency, select the value to use for quoting and reporting salaries. This field is required if you selected **Federal** on the Products page. The system also uses this value as the default compensation frequency in the Job Code Table. Valid values are in the Translate table.

AP Invoice Number Prefix

AP Inv. Prefix — Enter the prefix to be used for accounts payables invoices.

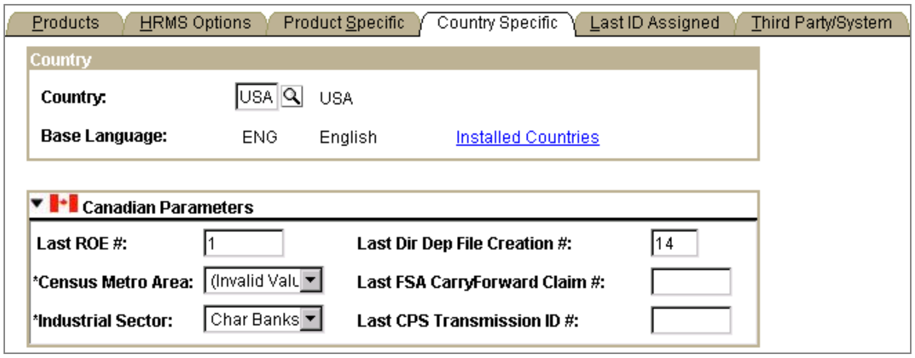
T&L (Time & Labor) / NA (North American) Payroll Paysheet Opt

Change Final Check — Select **Change Final Check,** if you want to enable payroll users to make pay sheet changes to data retrieved from Peoplesoft Time and Labor. We recommend that you don't select this option, as change made directly to the pay sheets won't be transmitted back to PeopleSoft Time and Labor.

Change Online Check	Select **Change Online Check,** if you want to want to enable payroll users to make pay sheet changes to data retrieved from PeopleSoft Time and Labor. We recommend that you don't select this option, as change made directly to the pay sheets won't be transmitted back to Time and. Labor.
Change Reversal Adjustments	Select **Change Reversal Adjustments,** if you want to want to enable payroll users to make pay sheet changes to data retrieved from PeopleSoft Time and Labor. We recommend that you don't select this option, as change made directly to the pay sheets won't be transmitted back to Time and. Labor.
Refresh on Job Change	If you select this option and the Job Pay flag on the pay sheet is set to *Yes*, a job change (such as a change in department, pay group, or employee status) causes payable time from PeopleSoft Time and Labor to be reloaded into PeopleSoft Payroll for North America when the pay sheet is rebuilt.
Load in Preliminary Calc (Calculations)	If you select the **Load in Preliminary Calc** option, PeopleSoft Payroll for North America automatically loads PeopleSoft Time and Labor data each time a user initiates the preliminary Pay Calculation process. It only loads payable time not sent to payroll before.

Installation Table - Country Specific Page

Usage	Use this page to enter country-specific installation information.
Object Name	INSTALLATION_TBL3
Navigation	**Define Business Rules, Define General Options, Setup, Installation Table, Country Specific**
Prerequisites	None
Access Requirements	None



Installation Table - Country Specific page

Country

Country

Enter the **Country.**

Base Language

Displays the base language spoken in the selected **Country.**

Installed Countries

Select this link to go to the Installed Countries page, where you can select which local country functionalities are installed in the system.

Canadian Parameters

Last ROE (Record Of Employment) #

If you prefer to let the system assign Record of Employment numbers, type the **Last ROE #** used. The system then increases that number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. Both of these values are used in PeopleSoft Payroll for North America when running a Canadian payroll.

Last Dir Dep (Direct Deposit) File Creation #

If you prefer to let the system assign direct deposit file numbers, type the **Last Dir Dep File Creation #** used. The system then increases that number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. Both of these values are used in PeopleSoft Payroll for North America when running a Canadian payroll.

Census Metro Area	Enter the **Census Metro Area** (CMA) code prescribed by Statistics Canada for this location. The system uses the default CMA code that you indicate here only if there is no default CMA code specified on the Primary Permission List Preferences page. The system checks the Primary Permission List Preferences page settings first, and if there is no CMA setting, it looks at the Installation Table. CMA refers to the main labor market area of an urbanized core with a population of at least 100,000. This field is required for Canadian companies.
Industrial Sector	The code you type in the **Industrial Sector** field is used for Canadian employment equity purposes. The system uses the default **Industrial Sector** that you indicate here only if there is no default Industrial Sector specified on the Primary Permission List Preferences page. The system checks the Primary Permission List Preferences page settings first, and if there is no Industrial Sector setting, it looks at the Installation Table. This value is used as the default for the Canadian Industrial Sector field in the Department Table, and it identifies the industrial sector with which employees in a given department are associated. This field is required.
Last FSA CarryForward Claim #	If you prefer to let the system assign FSA CarryForward claim numbers, type the **Last CarryForward Claim #** used. The system then increases that number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. Both of these values are used in PeopleSoft Payroll for North America when running a Canadian payroll.
Last CPS Transmission ID #	If you prefer to let the system assign CPS Transmission ID numbers, type the **Last CPS Transmission ID #** used. The system then increases that number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. Both of these values are used in PeopleSoft Payroll for North America when running a Canadian payroll.

Installed Countries Page

Usage	Use the Installed Countries page to specify which local country functionalities you want installed and made available to users in PeopleSoft Human Resources. All country functionality is turned on by system default.
Object Name	INSTALLATION_SEC
Navigation	Click the Installed Countries link on the Country Specific page to reach the Installed Countries page.

Installed Countries page

The check boxes on this page set system-wide defaults and affect all of your users. The system displays a flag representing each country that has special local functionality in PeopleSoft Human Resources. The check box next to the flag shows whether local functionality for that country is turned on or off.

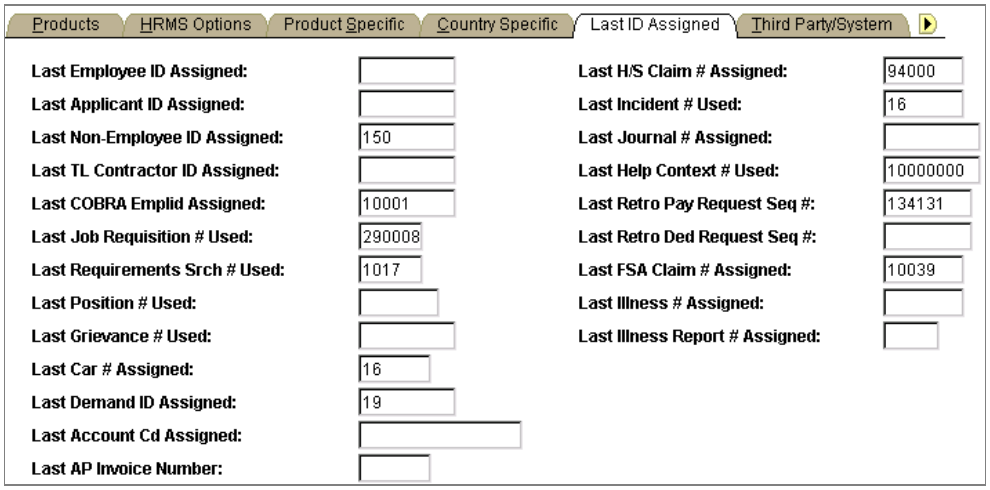
- **If the check box next to the flag is selected,** users will be able to see and work with that country's local functionality. This is the default setting.
- **If you clear a check box,** no users can access that functionality. For example, if you don't want any of your users to have access to any Canadian functionality, clear the Canadian check box here. The system hides the Canadian flag and any Canadian-related functionality. Users won't see it when they use PeopleSoft Human Resources.

If a local country check box is selected on the Installed Countries page, but you don't grant country access to users' Primary Permission List on the Maintain Global Security – Global Panels Page, users will *not* see any local country functionality.

For more information, including complete, step-by-step instructions on setting up global security for your PeopleSoft Human Resources system, see Setting up Security for Applicant Data.

Installation Table - Last ID Assigned Page

Usage	Throughout PeopleSoft Human Resources, several fields exist where you can choose to enter numbers manually or let the system automatically assign them. Use the Last ID Assigned page to specify the number the system should use to start assigning these numbers.
Object Name	INSTALLATION_TBL2
Navigation	**Define Business Rules, Define General Options, Setup, Installation Table, Last ID Assigned**
Prerequisites	None
Access Requirements	None



Installation Table - Last ID Assigned page

Here's where you can use the auto-numbering fields in PeopleSoft HRMS:

Field	***Application***	***Business Process(es)***
Last Employee ID Assigned	PeopleSoft Human Resources	Administering Workforce Recruiting Workforce
Last Applicant ID Assigned	PeopleSoft Human Resources	Recruiting Workforce Planning Successions
Last Non-Employee ID Assigned	PeopleSoft Human Resources	Monitoring Health and Safety Administering Training
Last TL Contractor ID Assigned	PeopleSoft Time and Labor Application	Administering Workforce Recruiting Workforce
Last COBRA Emplid Assigned	PeopleSoft Benefits Application	Administering COBRA
Last Job Requisition # Used	PeopleSoft Human Resources	Recruiting Workforce
Last Requirements Srch # Used	PeopleSoft Human Resources	Recruiting Workforce Planning Successions
Last Position # Used	PeopleSoft Human Resources	Managing Positions Planning Successions
Last Grievance # Used	PeopleSoft Human Resources	Managing Labor Relations
Last Car # Used	PeopleSoft Human Resources	Administer Company Cars
Last Demand ID Assigned	PeopleSoft Human Resources	Budget Training

Last H/S Claim # Assigned	PeopleSoft Human Resources	Monitoring Health and Safety
Last Incident # Used	PeopleSoft Human Resources	Monitoring Health and Safety
Last Journal Number Assigned	PeopleSoft Payroll for North America	Administer GL Interface
Last Help Context # Used	PeopleSoft HRMS	Customizing Windows Online Help
Last Retro Pay Request Seq #	PeopleSoft Payroll for North America	Manage Retroactive Pay
Last Retro Ded Request Seq #	PeopleSoft Benefits Applications	Manage Retroactive Benefits/Deductions
Last FSA Claim # Assigned	PeopleSoft FSA Claims Administration	Administer FSA

If you prefer to let the system automatically assign any or all of the numbers on this page, type the last number you used in the appropriate field. The system then increases that number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number.

To avoid maintaining two different sets of numbers, we recommend that you either always assign numbers manually or always let the system do it.

Employee ID Considerations

When you convert employee ID data to PeopleSoft Human Resources from another system, you should enter the highest employee number used in your previous system so that you don't duplicate IDs. For example, if the last employee ID you assigned in your previous system was 1000, enter 1000 in the Last Employee ID Assigned field. When you hire an employee in PeopleSoft Human Resources, the system automatically assigns an employee number of 1001 and updates the Last Employee ID Assigned field accordingly.

If you prefer to always enter Applicant and Employee IDs manually, type 999999999 (nine 9s) in the Last Employee ID Assigned and the Last Applicant ID Assigned fields.

If you use employee social security or insurance numbers as employee IDs (SSN or SIC), you need to change the formatting for the Employee ID field using the Application Designer.

For more information on Application Designer, see PeopleSoft Application Designer.

Zero-filled Numbers

Though you don't see it in Last ID Assigned, to make data entry faster and more accurate in several pages, when you type in a number that the system has automatically assigned, the system automatically fills in zeroes before the number. For example, when you enter the number 4, you see 00000004, a total of eight characters per number. This occurs for the following fields:

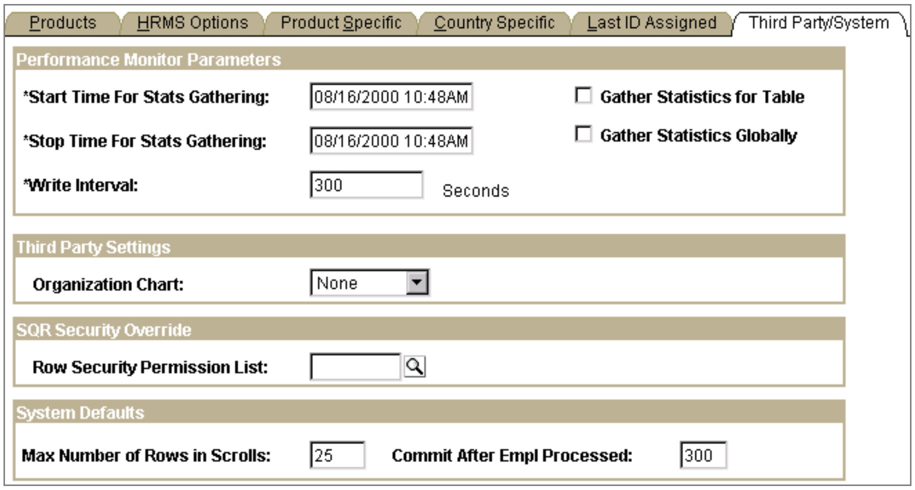
- Job Requisition
- Requirements Search
- Grievance
- Incident
- Claim
- Position

If you have already assigned numbers that aren't zero-filled, when you convert the data to PeopleSoft Human Resources, you need to change their numbering so the system can accurately track them.

For more information on data conversion, ask your human resources project leader or see your PeopleTools Application Designer documentation.

Installation Table - Third Party/System Page

Usage	Use the Third Party/System page to define parameters for using third-party application such as Visio. Here you can set the criteria for gathering statistics, and you can activate the SQR security for your HRMS system.
Object Name	INSTALLATION_TBL4
Navigation	**Define Business Rules, Define General Options, Setup, Installation Table, Third Party/System**
Prerequisites	None
Access Requirements	None



Installation Table - Third Party/System page

Performance Monitor Parameters

Start Time For Stats (Statistics) Gathering

To set the **Start Time For Stats Gathering,** enter the date and time of the start.

For more information on using the Performance Monitor, see Data Management Tools, "PeopleTools Utilities"

Gather Statistics for Table

Select **Gather Statistics for Table,** if you want the system to gather statistics locally.

Stop Time For Stats Gathering

To set the **Stop Time For Stats Gathering,** enter the date and time of the stop.

Gather Statistics Globally

Select **Gather Statistics Globally,** if you want the system to gather statistics globally.

Write Interval

The **Write Interval** enables you to set the intervals in number of seconds that you want the statistic gathered.

Third Party Settings

Organization Chart

In the **Organization Chart** field, enter the type of third-party program that your organization is using to create organization charts using your human resources data.

For more information on setting up and creating organization charts using Visio and your PeopleSoft Human Resources organization charting interface, please refer to Building Organization Charts.

SQR Security Override

Row Security Permission List Enter the Row Security Permission List that will have access to third-party systems.

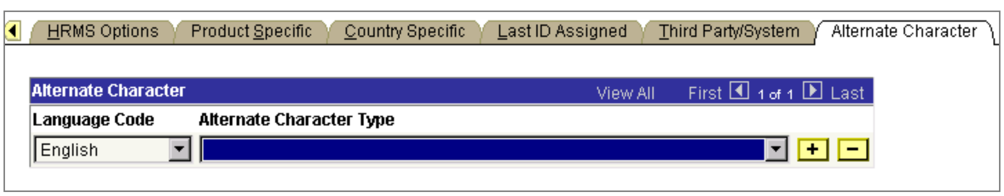
System Defaults

Max 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 Enter the maximum number of employees the third-party system should process before committing/

Installation Table - Alternate Character Page

Usage	Use the Alternate Character page to specify how the system handles double byte character languages in PeopleSoft HRMS.
Object Name	ALT_CHAR_TBL
Navigation	**Define Business Rules, Define General Options, Setup, Installation Table, Alternate Character**
Prerequisites	None
Access Requirements	None



Installation Table - Alternate Character page

Language Code Enter the **Language Code.**

Alternate Character Type Enter the **Alternate Character Type.**

For more information on setting up Alternate Character functionality in PeopleSoft HRMS, see Working With Double-Byte Characters.

USF Setting Up PeopleSoft HRMS for Federal Functionality

To properly set up your database for US Federal Government functionality you have to select Federal on the Installation Table – Products page and then update the Primary Permission List Preferences Table so that it is pointing to the US Federal Government industry and sector. Once you do this you'll have a database with full US Federal functionality.

You'll make your Primary Permission List preferences changes on the Primary Permission List Preferences – Settings page. To set up a Federal database, select an Industry of Government and an Industry Sector of US Federal.

For more information on the Primary Permission List Preferences component, see Setting Up Primary Permission List Preferences.

Setting Up HRMS Options on the PeopleTools Options Page

You'll use the PeopleTools Options page to set a variety of values that relate to multiple jobs functionality, organizations made up of more than one company, and organizations that conduct business using more than one currency. In this section we provide detail information on the fields that you'll use to activate or turn off these kinds of functionality.

For more information about the PeopleTools Options page, please see PeopleTools Options.

On the PeopleTools Options page, select the following check boxes, if applicable:

Multi-Jobs Allowed

Select **Multiple Jobs Allowed** if employees can have multiple, concurrent job assignments in your organization. For example, you might use this option when the Dean of the Graduate Division is also a Professor of Business Administration, or any time you need to maintain different sets records for the same person. If you select this option, the system enables the use of the Empl Recd# field when searching for data and opening various pages throughout PeopleSoft Human Resources, and displays the employment record information on the pages themselves.

If you use PeopleSoft Pension Administration, you *must* select **Multiple Jobs Allowed.** This is necessary because when you retire an employee with PeopleSoft Pension Administration, the system creates an additional concurrent job used for all retiree activities, including paying the retiree. If you don't currently use PeopleSoft Pension Administration, but are considering implementing it in the future, keep this requirement in mind and be sure that any modifications can handle scenarios where there are multiple jobs.

For more information about the PeopleSoft Pension Administration requirement for multiple jobs, see Establishing Pension Payees, "Establishing Pension Payees"

If you select **Multiple Jobs Allowed,** you must add **Add Concurrent Job** as an option to the Use menu in the Administer Workforce pages using PeopleTools Object Security.

Multi-Company Organization

Select **Multi-Company Organization,** if more than one company comprises your organization. If you use PeopleSoft Pension Administration, you set up companies specifically to house your pension payees, so you need to select this option.

Multi-Currency

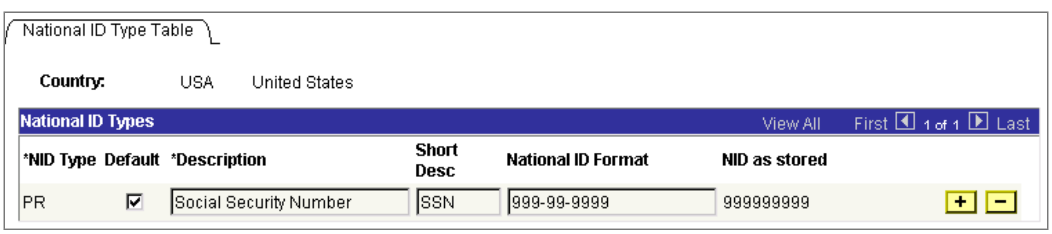
Select **Multi-Currency,** if you need to enter data in more than one currency in the system. For example, if you have offices in the United States and Italy, you may want to calculate pay rates in both U.S. dollars and in Italian lira. If you select **Multi-Currency,** the system displays a Currency Code field on pages where amount fields appear.

Note. Multi-Currency doesn't affect PeopleSoft Global Payroll, which has its own multiple currency functionality.

For more information on how to add the **Add Concurrent Job** option to your Use menu in the Administer Workforce pages, see Updating Workforce Information and Security.

National ID Type Table Page

Usage	Different 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 Code, and U.S. laborers have a Social Security Number. Each type of National ID has unique formatting requirements. Use the National ID Type Table page to assign a specific national ID type to a Country Code and provide the system with a default, or dummy national ID for a country to use when you don't have the actual ID available for an employee or applicant.
Object Name	NID_TYPE_TABLE
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, National ID Type Table, National ID Type Table** • **Define Business Rules, Manage Human Resources (USF), Setup, National ID Type Table, National ID Type Table**
Prerequisites	None
Access Requirements	Country



National ID Type Table page

When you select a Country Code on any global page where you are entering a National ID, the system refers to the information for the Country you selected on the National ID Type Table page. It also dynamically displays the proper ID label, sets the National ID Type, and refers to the ID format information to supply a default ID if the real one is unavailable.

The National ID Type Table page is already set up to ensure that you are tracking the proper National ID type for Belgium, Canada, France, Germany, Italy, Japan, the Netherlands, Spain Switzerland, the United Kingdom, and the United States. You can also use it to add new countries to the table or modify existing country ID information.

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Short Description.**

NID (National ID) Type

Select a **National ID Type** from the list of valid values stored on the Translate table. The **National ID Type** for the countries that are set up on the table is ***PR, Payroll Identification,*** or ***NO, None.*** The **National ID Type** that you indicate here controls the default National ID Type when you select a National ID Country on the system pages in PeopleSoft Human Resources where you enter National ID information for employees or applicants.

Note. Users in Germany and Japan aren't required to enter National ID data for workers. For those countries, ***NO, None*** is the default **National ID Type** on system pages when you select DEU or JPN as the National ID Country. We've configured the National ID Country and National ID Type fields on system pages so that users can select only ***PR, Payroll Identification*** as **National ID Type** for any country on the National ID Type Table whose National ID Type is set to Payroll Identification. Because National ID is a list box field on system pages, when users prompt for those values the system displays the descriptive name like a translate value.

When you select a Country Code on any system page where you enter a National ID, move out of the field and enter the worker's National ID. The system checks the format of the National ID information by referring to any special UDF Formatting information that is defined in the PeopleTools Application Designer for that country's National ID, and dynamically formats your National ID entry on system pages accordingly.

For more information on how automatic or default formatting for alphanumeric fields works using UDF Formatting functionality in PeopleSoft applications, see Application Designer, "Creating Field Definitions"

For example, if you enter National ID information for an employee you are hiring on the Hire, Eligibility/Identity page in the Administer Workforce (GBL) menu, and select a National ID Country of USA, the system defaults the **National ID Type** to Payroll ID, and automatically formats your nine-digit SSN as 999-99-9999 to comply with the UDF Formatting set for US SSNs in Application Designer. If you don't enter the correct number of digits or letters for a country's National ID, the system displays a warning message.

Note. Special PeopleCode Logic performs a Check Digit validation on Canadian National IDs and an 11-Check validity check on Dutch National IDs.

For more information on how the PeopleCode Logic performs these checks, see Administering Your Workforce, "Hiring Your Workforce"

Default

Select the **Default** check box if you want the National ID Format information that you type in the **National ID Format** field acts as the default National ID Number of all applicants or employees whose national ID are unavailable.

National ID Format

Indicate the default **National ID Format** for the National ID you've added. Enter ***9*** to act as a default placeholder for a number in the National ID, and ***A*** to indicate a default letter placeholder in the National ID. For example, for a U.S. Social Security Number or Canadian Social Insurance Number ID format, you'd enter:

```
999999999
```

because U.S. Social Security Numbers and Canadian Social Insurance numbers are nine digits in length.

For a UK National Insurance Number, you'd enter:

```
AA999999A
```

because UK National Insurance Numbers are made up of two initial letters, then six digits, followed by a final letter.

NID as stored

This shows how the NID is actually stored in the system.

Setting Up and Using Frequencies

In PeopleSoft HRMS, you use frequencies to define the period of time in which people are paid, deductions are taken from paychecks, and in which payroll processing occurs, to list a few examples.

PeopleSoft HRMS system uses frequency IDs throughout the PeopleSoft Human Resources, PeopleSoft Global Payroll, and PeopleSoft Payroll for North America applications. Each frequency ID has an associated annualization factor, which represents the number of times the period occurs in a year. The system provides several standard frequencies such as hourly, daily, monthly, and so on. But you can also define your own frequencies and their associated annualization factors using the Frequency Table page. On this page, you can use the Frequency Annualization Factor field to define a nonstandard annualization factor for a frequency. For example, you can define a frequency called W53 with a Weekly frequency type and an annualization factor of 53.

This section provides an overview and examples explaining the way PeopleSoft HRMS defines frequency and uses it to perform compensation rate conversions, as well as payroll and job rate calculations.

Enterprise Integration Point (EIP) Related to the Frequency Table

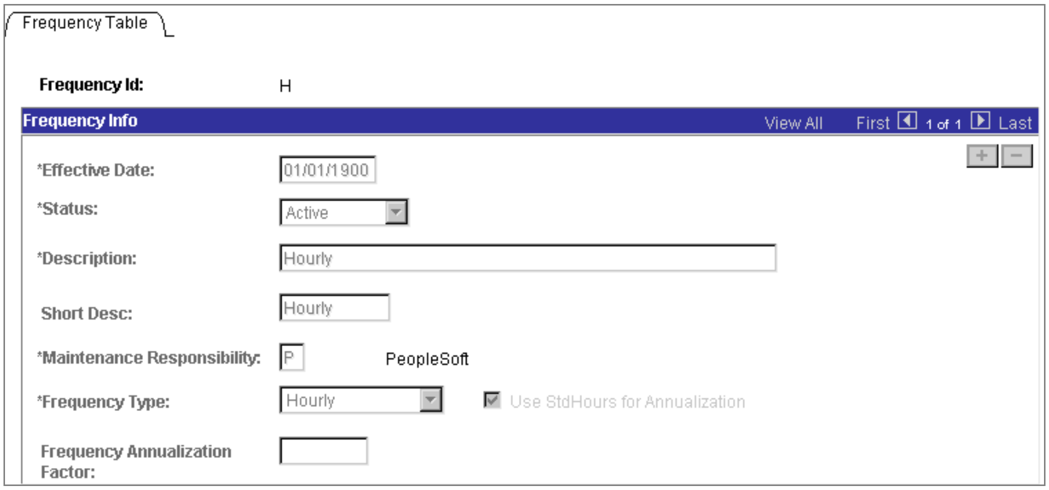
A frequency can be used to indicate how many times per year an event occurs. When you add, delete, or change frequency information in the FREQUENCY_TBL record (of the Frequency Table), the system automatically publishes the Frequency EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the FREQUENCY_TBL record on the Frequency Table.

For more information regarding the subscribers and technical details of the Frequency EIP, see Frequency Table. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

Frequency Table Page

Usage	Use the Frequency Table page to define a Frequency ID, its frequency type, and its annualization factor.
Object Name	FREQUENCY_TBL
Navigation	**Define Business Rules, Define General Options, Setup, Frequency Table, Frequency Table**
Prerequisites	None

Access Requirements	Enter a Frequency ID.



Frequency Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Effective Date, Status, Description, Short Desc** (description).

Frequency Id The system displays the **Frequency Id** you entered when you accessed the page.

Maintenance Responsibility Select a **Maintenance Responsibility.**

C (Customer). Select this value if you are defining your own Frequency ID. Customer indicates that you are responsible for keeping this frequency code up to date.

P (PeopleSoft). This value indicates that PeopleSoft delivers this frequency in the system and is responsible for keeping it up to date and the page's other fields are unavailable for entry.

Frequency Type Select a **Frequency Type.** The following are the valid values prompting from the Translate table.

A (Annual)

B (Biweekly)

C (Contract)

D (Daily)

F (Fourweekly)

H (Hourly). If you select Hourly, the **Use StdHours for Annualization** check box becomes available for data entry.

M (Monthly)

Q (Quarterly)

S (Semimonthly)

W (Weekly)

Use StdHours for Annualization

If you select **Frequency Type *Hourly,*** the **Use StdHours for Annualization** (use standard hours for annualization) check box becomes available to edit. Select **Use StdHours for Annualization** to indicate that the system uses Job Standard Hours for annualization instead of the **Frequency Annualization Factor.** This option is available for any ***Hourly*** **Frequency Type.** If you select **Use StdHours for Annualization,** the **Frequency Annualization Factor** is set to ***0*** and is unavailable for data entry.

Note. You can only use hourly frequencies that use standard hours for annualization for compensation and pay frequency in HR and Payroll.

Frequency Annualization Factor

Enter a **Frequency Annualization Factor** for this **Frequency Id.** This field is unavailable for data entry if you selected a **Frequency Type** of ***Hourly*** and **Use StdHours for Annualization**. The **Frequency Annualization Factor** defines how many frequency periods occur in one year.

For example, a daily compensation frequency is 260 because there are 260 workdays in the year.

Important! If you change the Effective Status, Frequency Type, or Annualization Factor of an existing frequency, you receive a warning saying that previous calculations using this frequency aren't synchronous with the new values of the frequency.

Using Frequencies 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 per year (annual frequency) or $5,000 a month (monthly frequency). When you associate these compensation rates with jobs, positions, salary steps, or with employee records individually, the system uses the annualization factor associated with this frequency to convert the compensation to other frequencies.

When you set up your PeopleSoft Human Resources system, you can define default frequencies at several levels. You can generally change that default value when the system enters it into other pages.

Defining Default Frequency on the Installation Table

On the Installation Table - Product Specific Page, you can set a default compensation frequency and default work period for your organization. The system enters these values as the default frequencies for job codes in the Job Code Table.

Defining Default Frequency on the Job Code Table

On the Job Code Table – Job Code Profile page, you can override the default compensation frequency and default work period that the system inserts as default values from the Installation table. You can define new default compensation frequency and a new default work period for any compensation components you associate with a job code on this page.

Defining Default Frequency on the Comp Rate Code Table

You can define compensation frequency for rate codes on the Comp Rate Code Table. The system inserts these rate code frequencies as the default when you manually enter rate codes on compensation grids throughout the system. The Comp Rate Code Table also lets you define whether the FTE (full time equivalency) calculation should be applied to the compensation associated with the rate code.

Defining Default Frequency on the Pay Group Table

On the Pay Group Table, you define pay frequency for a pay group using the fields in the **Frequencies** group box. All workers in a pay group are paid with the same frequency. In this group box, you also define values for the Daily and Monthly fields. These fields are required for each pay group, and they contain frequency IDs that the system uses to calculate the daily and monthly rates that appear in the **Pay Rates** group box on the Hire – Compensation page.

Human Resources Standard Frequencies

PeopleSoft Human Resources delivers the following Frequency IDs in the Frequency table:

Frequency ID	***Description***	***Annualization Factor***
A	Annual	1
B	Biweekly	26
C	Contract	1
D	Daily	260
F	Fourweekly	13
H	Hourly	2080
M	Monthly	12
Q	Quarterly	4
S	Semi-Monthly	24
W	Weekly	52

Using Frequency With Payroll Calculations

PeopleSoft Global Payroll and PeopleSoft Payroll for North America use frequency to define how often certain events happen. Examples are how often someone is paid and how often a process is run. Both PeopleSoft Payroll for North America and PeopleSoft Global Payroll use the Frequency Table page enabling you to define your own compensation and pay frequencies, which you then use wherever earnings frequency conversions occur within the system.

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 Global Frequency Tag Table.

PeopleSoft Payroll for North America uses frequency to define compensation and pay frequencies, including the annualization and de-annualization of compensation rates.

PeopleSoft Global Payroll

Before we discuss how frequency is used in PeopleSoft Global Payroll, it's important to define what an element is. An element is the smallest component of PeopleSoft Global Payroll and is used in defining calculation rules to process your payroll. Elements can hold the values of pay (earnings), of an amount to be deducted from pay (deduction), or the value of time away from work for an employee (absence). They are building blocks that relate to other elements to define and form your payroll system.

Elements such as earnings, deduction, or absence elements can be stand-alone. There are also supporting elements, such as rate codes or rounding rules, that are used together with other elements in defining a calculation rule. Each element is defined only once, but can be used over and over.

For any earnings, deduction, or absence element, you must specify the frequency of the calculated result. For each item 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	In what frequency is the stated amount paid? Is it 100 per hour, per week, per month, or per year?
Deductions	In what frequency is the stated amount withheld? Is it 100 out of each paycheck, or is it withheld only from the first paycheck in a month?
Absence Entitlement	Is an employee entitled to three days of holiday time per month or per year?

In this section, we discuss how frequency is used in PeopleSoft Global Payroll.

Using Frequency With Element Definitions

In PeopleSoft Global Payroll, you use frequency when defining earnings, deduction, or absence elements.

To illustrate, we refer to defining an earnings element. However, the process is the same for earnings, deduction, or absence elements.

You define the calculation rule, frequency, and generation control for an earnings element on the Earnings Calculation Page.

There are four types of calculation rules that you can select: Amount, Rate x Unit, Rate x Unit x Percentage, or Base x Percentage. Once you select your calculation rule, you must further define details for each component of the calculation rule. For example, if you select Amount, you must specify the actual amount of the earnings element.

The following table lists the components of a calculation rule for which frequency conversion is performed:

Calculation Rule	***Component***
Amount	Amount (if necessary)
Rate x Unit	Unit
Rate x Unit x Percentage	Unit
Base x Percentage	Base

Next, you define the frequency with which this earnings element is paid. If you select Use Calendar Frequency, the system assumes that this earnings element uses the same frequency as the one that's defined for the calendar period on the Calendar Period Page. If you select Use Specified Frequency, you can define your frequency directly in the Earnings Calculation page by selecting from a list of frequencies. For example, you can select a frequency of M (monthly) to indicate that this earnings element is to be paid on a monthly basis.

The Frequency field enables you to tell the system the frequency with which you are stating a value. For example, let's say you select Use Specified Frequency and have a weekly payroll, and you create an earnings element with an amount of 100 and a frequency of Monthly. Assuming 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 you define your organization's monthly frequency as 12 and weekly frequency as 52. The system takes the 100 (monthly amount) and first annualizes it to 1200. Next, it takes this annualized amount and de-annualizes it into the payroll processing frequency (which is 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, semi-monthly, and monthly), you don't have to create separate earnings for each frequency. The system converts the amount into the corresponding pay period amount for each pay frequency. 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. Let's say that 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 get paid weekly and payees who get paid monthly by using annualization and de-annualization. The frequency assigned on the Earnings Calculation page calculates the bonus amount correctly, regardless of their pay frequency.

In PeopleSoft Global Payroll, there is no distinction between employees and non-employees. Because payroll is processed for both employees and non-employees, the PeopleSoft Global Payroll documentation refers to both of them as payees.

The HR Frequency Table and the PeopleSoft Global Payroll Frequency Tag Table

Pay period frequency isn't hard-coded into the system. Instead, PeopleSoft Global Payroll uses the HR Frequency Table 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 defined on the Frequency Table page are easily used wherever you use frequency in the system.

However, some frequencies aren't defined on the Frequency Table. PeopleSoft Global Payroll has created an intermediary table called the Frequency Tag Table to accommodate those that aren't defined on the HR Frequency Table.

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 to be paid only on the first pay period of the month. In PeopleSoft Human Resources, the frequency would be monthly. This may 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 Frequency Tag Table is part of generation control frequency processing.

Using Frequency With Generation Control

Generation control enables you to tell the system, through various control methods, when to process an element. For example, if you have an earnings element that you want paid only to active payees, you can control the payroll so that this earnings type doesn't get paid to terminated payees. First, you define Generation Control ID parameters in the Generation Control Conditions Page. Next, when you go to define an earnings element, you can prompt against this table by selecting a Generation Control Name on the Earnings Calculation page. This way, you don't have to redefine parameters for each earnings element individually.

If you leave the Generation Control field blank on the Earnings Calculation page, the system assumes that no generation control conditions exist and that the earnings element resolves every time. In other words, the system assumes that an earnings is to be paid every time a payee's earnings are processed. In order to control when and to whom an earnings element is paid, you can use generation control to limit the system from processing it.

If the frequency you select is anything other than Use Calendar Period Frequency, the system annualizes and de-annualizes the earnings amount, based on the pay period frequency. If a generation control frequency exists, the system annualizes and 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 de-annualizes to 100 per month (1200/12 = 100). If you have a generation control frequency for this earnings, the amount is different. Let's say that you have defined a generation control frequency of quarterly. The earnings now de-annualize to 300 (1200/4 = 300).

PeopleSoft Global Payroll delivers two generation control frequencies as part of the system data that's delivered with the core application. These are QTR END and YEAR-END. Both generation control frequencies are 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 what time period you want to calculate. This is often referred to as the pay period. You define period selection criteria through the definition of the Period ID on the Calendar Period Page.

The Period ID definition defines the begin date, the end date, and the frequency of a given pay period. This definition of time and frequency is kept separate from the pay calendar to make reusing this period definition easy 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.

Begin Date	***End Date***	***Frequency***
June 1	June 7	Weekly
June 1	June 30	Monthly
June 1	June 15	Semi-Monthly
June 1	August 31	Quarterly

On the Calendar Period page, the frequency is defined for de-annualization when an earning, deduction, or absence element is defined without generation control frequency. However, if generation control frequency is included (in the earning, 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

Frequency	***Element 1***	***Element 2a***	***Element 2b***	***Element 3***
Amount	1200	1200	1200	1200
Frequency (Element Definition)	Monthly (12)	Monthly (12)	Monthly (12)	Monthly (12)
Generation Control Frequency	None	Monthly (12)	Monthly (12)	Semi-Monthly (24)
Pay Period Frequency	Semi-Monthly (24)	Semi-Monthly (24)	Semi-Monthly (24)	Semi-Monthly (24) *
Calendar Generation Control Frequency	None	Monthly (12)	None	Semi-Monthly (24) *
Calculated Amount	600	1200	Not resolved**	600

*It isn’t necessary to specify the associated frequency, if it coincides with the pay period frequency.

Using Frequency With Rate Codes and System Elements

When defining an earnings or deduction element that must use either a rate code or a frequency-controlled system element, the earnings or deduction should always have a frequency of Use Calendar Period Frequency.

System elements are delivered and maintained by PeopleSoft. You don’t ever have to change them, nor do you have to anything special to define them further.

Any system element that is frequency-controlled resolves in the calendar frequency portion of payroll processing, according to the frequency specified for the element when it is set up. The system then de-annualizes by the calendar frequency.

PeopleSoft Payroll for North America

PeopleSoft Payroll for North America uses the Frequency Table page to enable you to define your own compensation and pay frequencies, which you then use wherever earnings frequency conversions occur within the system. The values defined on the Frequency Table are available anywhere in the PeopleSoft Payroll for North America system where compensation and pay frequency fields exist. All compensation and pay frequency fields display available Frequency ID values, which are values in the Frequency ID field in the Frequency Table record.

Two fields–Comp (compensation) Frequency and Pay Frequency–used throughout the PeopleSoft Payroll for North America system refer to the Frequency Table for their values.

The primary purpose of compensation and pay frequencies in PeopleSoft Payroll for North America is for annualization and de-annualization of compensation during both batch and online system processes.

Example

Let's look at an example of how PeopleSoft Payroll for North America annualizes and de-annualizes compensation using the data stored on the Frequency Table.

Imagine that the pay group to which an employee is assigned is set up with a pay frequency of *ABC*. Imagine also that the employee Job record is set up with a compensation rate of $1,000.00 and a compensation frequency of *DEF*. *ABC* is the pay frequency, and it is stored on the Frequency Table with a frequency type of *B* (biweekly) and a frequency annualization factor of 26.1. *DEF* is the compensation frequency, and it is stored on the Frequency Table with a frequency type of *M* (monthly) and a frequency annualization factor of 12. Calculation of the employee's annual and pay period compensation rates results in the following figures:

- Annual Rate = (comp rate * comp frequency factor)

  $12,000.00 = (1,000.00 * 12)

- Biweekly Rate = (comp rate * comp frequency factor) / pay frequency factor

  $459.77 = (1,000.00 * 12) / 26.1

Synchronization of PeopleSoft Human Resources and PeopleSoft Payroll for North America Processes

PeopleSoft Human Resources must obtain annualization factors from a consistent location, so that PeopleSoft Human Resources and PeopleSoft Payroll for North America consistently calculate the same hourly, monthly, and annual rates, regardless of where in the system the calculation takes place. Hourly, monthly, and annual rates are stored on the Job record.

To resolve this issue, the system uses the Daily and Monthly fields on the Pay Group Table 1 page. On the Pay Group Table 1 page, the Daily and Monthly fields should be defined by choosing the pay frequency that matches the name of the field. Valid values prompt from the Frequency Table. The Daily and Monthly fields are required fields for each pay group, and they contain frequency IDs that the system uses to calculate the daily and monthly rates for storage on the Job record.

When a pay group has a pay frequency type of monthly, the monthly frequency value you define on the Pay Group Table 1 page must be the same as the pay frequency value for the pay group. This ensures that the monthly rate on the Job record is the same as the monthly rate that the payroll process calculates.

The standard Work Period field on the job record indicates the time period in which employees must complete the Standard Hours. Valid values are stored on Frequency table. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE (full-time equivalency).

For more information about Standard Work Period defaulting, see Defaulting of Standard Hours and Standard Work Period.

Example

Assume that the Job, Pay Group, and Frequency Table records contain the following information. The following examples illustrate how the system obtains the rates during both online and batch processing.

Job Record

Employee	*Comp Rate*	*Comp Freq*	*Std Hours*	*Pay Group*	*STD Weeks*
John	$100.00	W	40.00	PAY1	W
Jane	$10.00	H	40.00	PAY2	W

Pay Group Record

ID	*Pay Freq*	*Daily Freq*	*Monthly Freq*
PAY1	B	D	M
PAY2	W	D	M

Frequency Record

ID	*Freq Type*	*Freq Factor*
H	H	2080.00
W	W	52.00
B	B	26.00
D	D	260.00
M	M	12.00

Employee John

Hourly Rate	= (Comp Rate * Comp Freq) / (Standard Hours * STD Weeks Freq)
$2.50	= (100.00 * 52.00) / (40.00 * 52.00)
Daily Rate	= (Comp Rate * Comp Freq) / Daily Freq
$20.00	= (100.00 * 52.00) / 260.00
Monthly Rate	= (Comp Rate * Comp Freq) / Monthly Freq
$433.00	= (100.00 * 52.00) / 12.00

Annual Rate	= (Comp Rate * Comp Freq)
$5,200.00	= (100.00 * 52.00)

Employee Jane

Hourly Rate	= Comp Rate
$10.00	= 10.00
Daily Rate	= (Comp Rate * Standard Hours * STD Weeks Freq) / Daily Freq
$80.00	= (10.00 * 40.00 * 52.00) / 260.00
Monthly Rate	= (Comp Rate * Standard Hours * STD Weeks Freq) / Monthly Freq
$1,733.33	= (10.00 * 40.00 * 52.00) / 12.00
Annual Rate	= (Comp Rate * Standard Hours * STD Weeks Freq)
$20,800.00	= (10.00 * 40.00 * 52.00)

Exceptions to Frequency Table Use

Some processes, such as deduction calculations and Canadian tax calculations, use the pay periods per year from the calendar table. The value in the pay periods per year field on the calendar table is derived from the frequency type. For example, a frequency type of weekly means that pay periods per year are either 52 or 53, and a frequency type of semimonthly is 24.

For more information on how frequencies are handled by the PeopleSoft Payroll for North America system, see your PeopleSoft Payroll for North America documentation.

Overview of Frequency Conversion

PeopleSoft HRMS calculates and displays compensation rates in the hourly, daily, weekly, monthly, and other frequencies using two standard frequency conversion formulas. Depending upon the frequency being converted, the system performs the calculations by applying the following factors to the compensation rate:

- Frequency annualization factor
- Job standard hours
- Annualization factor of the standard work period
- FTE factor

The following topics define these factors and how the system applies them in frequency conversion formulas.

Defining the Frequency Annualization Factor

The system provides several standard frequencies such as hourly, daily, monthly, and so on. Each frequency ID has an associated annualization factor, which represents the number of times the period occurs in a year. For example, the standard annualization factor of a weekly frequency is 52, and the standard annualization factor of a monthly frequency is 12.

You can also define your own frequencies and their associated annualization factors using the Frequency Table page. On this page you describe your frequency and select a Frequency Type. Using the Frequency Annualization Factor field, you can define a nonstandard annualization factor for a frequency. For example, you can define a frequency called W53 with a Weekly frequency type and an annualization factor of 53.

Defining 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 defines how many hours the employee 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) from the Frequency table.

You define the standard hours and the standard work period on the following pages:

- On the Hire – Job Information page, you define these values for an employee.
- On the Job Code Table – Job Code Profile page, you define these values for a job code.
- On the Job Requisition Data – Basic Eligibility page, you define these values for an employment application.
- On the Salary Plan Table page, you define these values for a salary plan.
- On the Position Data - Job Information page, you define these values for a position.
- On the Primary Permission List Preferences – Settings page, you define these values as defaults for a Primary Permission List.
- On the Installation Table - Products page, you define these values as defaults for a company.
- On the Business Unit HR Defaults – HR Defaults page, you define these values as defaults for HR.

Defaulting of Standard Hours and Standard Work Period

The system inserts Standard Hours and Standard Work Period as default information only if both are defined. As an illustration, the following list describes the source of defaults in the job record under the specified conditions:

- The Job Code Table – Job Code Profile page, if you assigned the worker a job code
- The Salary Plan Table page, if you assigned the worker to a position
- The Primary Permission List Preferences – Setting page for the user's User ID
- The Installation Table – Products page, if you haven't indicated standard hours on the Job Code Table, the Salary Plan Table, or the Primary Permission List Preferences Table.

Defining FTE

Full Time Equivalency (FTE) is the percent of full time an employee should normally work in a job. In calculating the FTE, the system uses your definition of the job 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 employees.

For employees in French regulatory regions, the system uses the PAID_FTE field to prorate holiday hours and pay for part-time and hourly employees.

PeopleSoft Human Resources FTE Calculation
FTE = (Job Standard Hours x Annualization Factor of Job Standard Work Period) / (Default "full time" Standard Hours x Annualization Factor of Default "full time" Standard Work Period) where the default "full time" Standard Hours and default "full time" Standard Work Period are from: • The Salary Plan Table (if a Salary Plan is defined for the employee, and if both Standard Hours and Standard Work Period are defined for this Salary Plan) • The Primary Permission List Preferences Table (if no Salary Plan is defined for the employee, and if both Standard Hours and Standard Work Period are defined in the Primary Permission List Preferences Table).

Compensation Rate Frequency Conversion Calculations

The system converts compensation rates into daily, monthly, and other frequencies throughout the system using standard formulas. The formula for converting to or from an hourly rate takes job standard hours and standard work period into account.

The system performs compensation rate conversions by first finding an annual rate (annualizing) for an employee's compensation using the annualization calculations in this section. It then divides the annual rate using de-annualization conversion calculations to calculate the desired frequency. If Apply FTE (full time equivalency) is selected for the pay component, the system multiplies the converted compensation rate by the FTE factor.

For employees in French regulatory regions, the system will use the PAID_FTE to multiply the converted compensation rate.

Calculating the Annualized Rate

The system uses the following formulas to convert compensation rates to an annual frequency:

Hourly

Annual Rate =

Comprate x Job Standard Hours x Frequency Annualization Factor of Standard Work Period

Monthly, Daily, and other Conversions

Annual Rate =

Comprate x Frequency Annualization Factor

Calculating the De-annualized Rate

The system uses the following formulas to convert compensation rates from an annual frequency to another frequency:

Hourly

Non-Annual Rate =

Comprate /(Job Standard Hours x Frequency Annualization Factor of Standard Work Period)

Monthly, Daily, and other Conversions

Non-Annual Rate =

Comprate / Frequency Annualization Factor

Examples of Compensation Frequency Conversions

The following examples illustrate the use of these formulas.

Example of Hourly to Monthly Compensation Rate Conversion

Teresa Johnson has following employment 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 Full Time Equivalent (FTE) compensation rate. The total represents Teresa's monthly salary, based on a 35-hour workweek over a 52-week year.

Rate	***Equation***
Annual Rate =	Annual rate =Comprate x Job Standard Hours x Frequency Annualization Factor of the Standard Work Period $10 x 35 x 52 = $18,200
Monthly Rate =	Annualized Comprate / Frequency Annualization Factor of Month $18,200 /12 = $1516.67

Example of Monthly to Biweekly Compensation Rate Conversion

Bill McKenny is a non-hourly employee with the following employment information:

Employment Variables	***Value***
Comprate (monthly)	$2000
Frequency Annualization Factor of Month	12
Frequency Annualization Factor of Biweek	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 Rate =	Comprate x Frequency Annualization Factor of Month $2000 x 12 = $24,000
De-annualize Rate =	Annualized Comprate / Frequency Annualization Factor of Biweek $24,000 / 26 = $923.08
Multiply by FTE	$923.08 x 0.95 = $876.85

Job Rates Frequency Conversion Calculations

The system displays the following job compensation rates on the Hire – Compensation page: annual, monthly, daily, and hourly to show the employee's compensation in various frequencies other than the compensation rates calculated using the standard frequency conversions. Note that the conversions of daily and monthly rate are based on the employee's pay group. For PeopleSoft Payroll for North America, these job compensation rates are actual pay rates. For PeopleSoft Human Resources and PeopleSoft Global Payroll, these aren't actual pay rates.

You can define the daily and monthly pay frequency on the Pay Group Table 1 page for either PeopleSoft Payroll for North America or PeopleSoft Global Payroll. For PeopleSoft Payroll for North America, if the pay frequency type on the Pay Group table is Monthly, then the monthly rate frequency must be the same frequency as the pay frequency.

The system finds the frequencies associated with the employee's pay group from the Pay Group table of either PeopleSoft Payroll for North America or PeopleSoft Global Payroll, depending on the employee's pay system flag. The system uses the following formulas to calculate the employee's job pay rates:

Calculating Non-Hourly Frequency Conversion

A non-hourly employee is compensated using a pay frequency other than an hourly rate. An example is someone compensated using a monthly or yearly salary.

Rate	***Equation***
Annual Rate =	(Comprate x Annualization Factor of Comp Frequency)
Monthly Rate =	(Comprate x Annualization Factor of Comp Frequency)/ Annualization Factor of Monthly Rate Frequency from Pay Group table)
Daily Rate =	(Comprate x Annualization Factor of Comp Frequency)/ (Annualization Factor of Daily Rate Frequency from Pay Group table)
Hourly Rate =	(Comprate x Annualization Factor of Comp Frequency)/ (Job Standard Hours x Annualization Factor of Job Standard Work Period)

Example of Non-Hourly Job Rate Conversion

Mary Jackson is a non-hourly employee with the following employment information:

Employment Variables	***Values***
Comprate (monthly)	$3000
Annualization Factor of Comp Frequency	12
Annualization Factor of Monthly Rate Frequency of Mary's Pay Group	12
Annualization Factor of Daily Rate Frequency of Mary's Pay Group	260
Annualization Factor of Job Standard Work Period	53

The following table shows how the system calculates Mary Jackson's job rates:

Rate	***Equation***
Annual Rate =	(Comprate x Annualization Factor of Comp Frequency) 3000 x 12 - 36000

Monthly Rate =	(Comprate x Annualization Factor of Comp Frequency)/ Annualization Factor of Monthly Rate Frequency from Pay Group table) (3000 x 12) / 12 = 3000
Daily Rate =	(Comprate x Annualization Factor of Comp Frequency)/ (Annualization Factor of Daily Rate Frequency from Pay Group table) (3000 x 12) / 260 = 138.46
Hourly Rate =	(Comprate x Annualization Factor of Comp Frequency)/ (Job Standard Hours x Annualization Factor of Job Standard Work Period) (3000 x 12) / (35 x 53) = 19.40

Calculating Hourly Conversion

An hourly employee is compensated using an hourly rate of pay as opposed to a monthly or yearly salary.

Rate	***Equation***
Annual Rate =	(Comprate x Job Standard Hours x Annualization Factor of Job Standard Work Period)
Monthly Rate =	(Comprate x Job Standard Hours x Annualization Factor of Job Standard Work Period) / (Annualization Factor of Monthly Rate Frequency from Pay Group table)
Daily Rate =	(Comprate x Job Standard Hours x Annualization Factor of Job Standard Work Period) / (Annualization Factor of Daily Rate Frequency from Pay Group table)
Hourly Rate =	(Comprate x Job Standard Hours x Annualization Factor of Job Standard Work Period) / (Job Standard Hours x Annualization Factor of Job Standard Work Period)

Example of Hourly Job Rate Conversion

Ted Smith is an hourly employee with the following employment information:

Employment Variables	***Values***
Comprate (hourly)	$10
Job Standard Hours	40
Annualization Factor of Job Standard Work Period (WEEK)	52

Annualization Factor of Rate Frequency from Ted's Pay Group	12
Annualization Factor of Daily rate Frequency from Pay Group table	260

Here is how the system calculates Ted Smith's various job rates:

Rate	***Equation***
Annual Rate =	(Comprate x Job Standard Hours x Annualization Factor of Job Standard Work Period) $10 x 40 x 52 = 20800
Monthly Rate =	(Comprate x Job Standard Hours x Annualization Factor of Job Standard Work Period) / (Annualization Factor of Monthly Rate Frequency from Pay Group table) ($10 x 40 x 52) / 12 = 1733.33
Daily Rate =	(Comprate x Job Standard Hours x Annualization Factor of Job Standard Work Period) / (Annualization Factor of Daily Rate Frequency from Pay Group table) ($10 x 40 x 52) / 260 = 80.00
Hourly Rate =	(Comprate x Job Standard Hours x Annualization Factor of Job Standard Work Period) / (Job Standard Hours x Annualization Factor of Job Standard Work Period) ($10 x 40 x 52) / (40 x 52) = 10

Setting Up Local Country Functionality

If you're administering a local workforce for or your enterprise operates in Canada, France, Germany, Japan, or the United States, or some combination of those countries, you need to set up some tables that are referenced in the core control tables to support local country requirements. You must do this before you set up core control tables such as Pay Groups, or define Companies, Locations, Departments, and Job Codes.

Setting Up French Control Tables

You must set up information in the French control tables to track data for your French employees.

For more information on regulatory reporting options in PeopleSoft Human Resources, see Meeting French Reporting Requirements.

These tables are located in Manage Human Resources (FRA), Manage Human Resources (GBL), Lcl (Local), and Report Regulations (FRA).

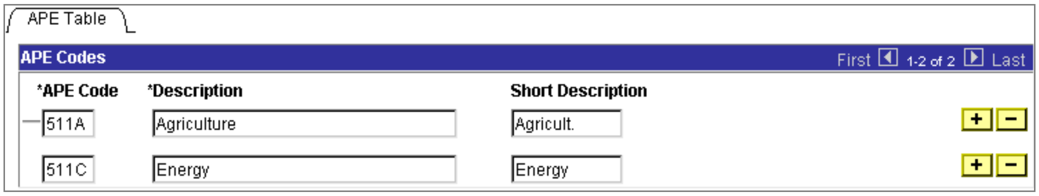
Enterprise Integration Point (EIP) Related to the APE Table

APE (Activite Principale Exercee) codes classify a French company's type of industry or activity. When you add, delete, or change APE code information in the PS_APE_INDSTRY_FRA record (of the APE Table), the system automatically publishes the APE Industry Codes Table - France EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the PS_APE_INDSTRY_FRA record on the APE Table.

For more information regarding the subscribers and technical details of the APE Industry Codes Table - France EIP, see APE Industry Codes Table - France. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

FRA APE Table Page

Usage	Use the APE (Activite Principale Exercee) Table page to maintain APE codes for your French organization. These codes are used to classify the type of industry a company represents – such as software, banking, insurance, and so forth. The APE codes are a normalized set of codes that are required by law and are used on the Training Report 2483 (TRN029).
Object Name	APE_INDSTRY_CD_FRA
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup Lcl, FRA APE Table, APE Table** • **Monitor Workplace, Report Regulations (FRA), Setup, APE Table, APE Table**
Prerequisites	None
Access Requirements	None



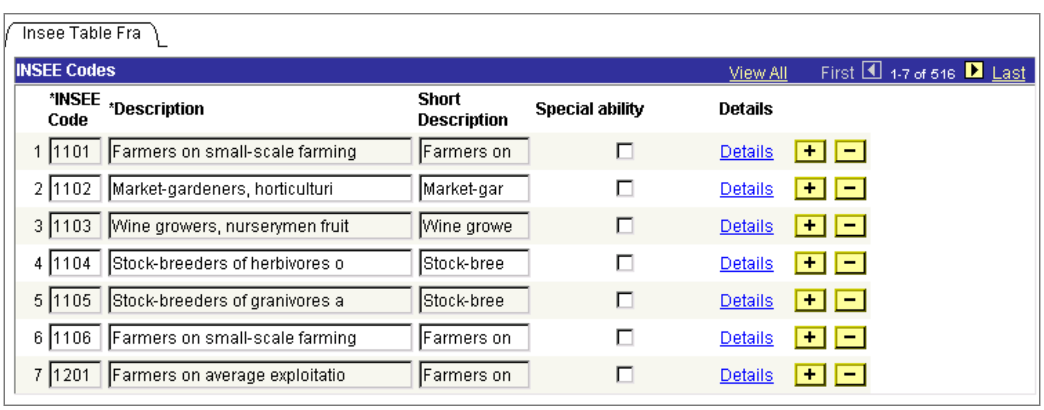
FRA APE Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Short Description.**

APE Code Enter or update the **APE Code.**

FRA INSEE Table Page

Usage	Use the FRA INSEE (National Institute for Statistical and Economical Studies) Table page to maintain INSEE Codes for your French organization. The system displays the description that you enter for this code on any pages or reports that reference the INSEE Code in PeopleSoft Human Resources. These values are set by the INSEE and classify job codes. You will link an INSEE Code to all defined job codes that are used in French organizations.
Object Name	INSEE_TABLE_FRA
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup Lcl, FRA INSEE Table, Insee Table Fra** • **Monitor Workplace, Report Regulations (FRA), Setup, INSEE Table, Insee Table Fra**
Prerequisites	None
Access Requirements	None



FRA INSEE Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Short Description.**

INSEE Code (national institute for statistical and economic studies)

Enter the **INSEE Code** issued by INSEE.

Special ability

Select this check box, if this INSEE Code represents a job that requires a **Special Ability.**

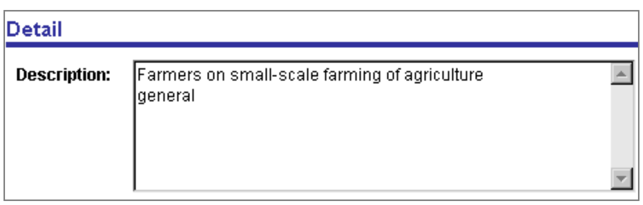
Any employee who is assigned (through the job code) an INSEE Code with this check box selected can't be listed as disabled on the French Disability report.

Details

Select the **Details** link to record additional information or comments concerning this INSEE Code on the Detail page.

FRA INSEE Table - Detail Page

Usage	Use the Detail page to record additional information or comments concerning an INSEE Code.
Object Name	INSEE_DSCRLONG_SEC
Navigation	To access the Detail page, select the Details link from the INSEE Table Fra page.



FRA INSEE Table - Detail page

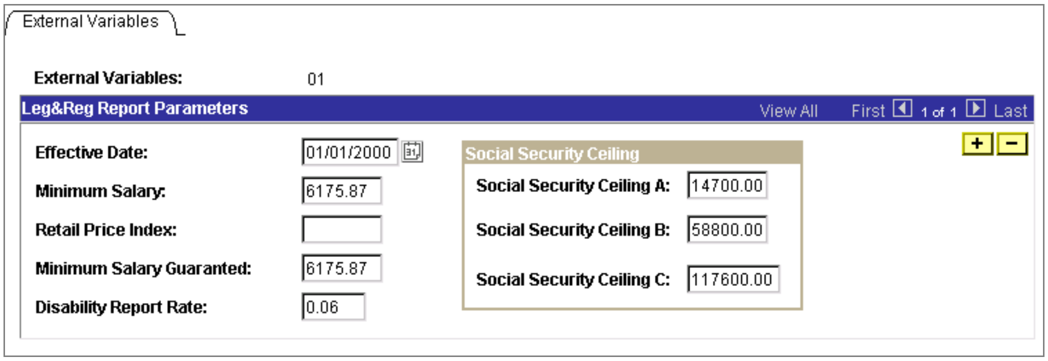
Description

You may enter up to 250 characters of text in the **Description** field.

FRA External Variables Table Page

Usage	Use the External Variables Table to enter information related to salaries and social security ceilings established by the French government each year. The values you enter here act as a reference for salary and payroll processing in PeopleSoft Human Resources.
Object Name	EXT_PARM_CD_FRA
Navigation	• Define Business Rules, Manage Human Resources (GBL), Setup Lcl,

	FRA External Variables Table, External Variables • Monitor Workplace, Report Regulations (FRA), Setup, External Variables Table, External Variables
Prerequisites	None
Access Requirements	Enter an External Variables code.



FRA External Variables Table page

The following field is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Effective Date.**

External Variables System displays the **External Variables** code.

Leg&Reg Report Parameters

Minimum Salary Indicate a **Minimum Salary** for this External Variable. These amounts are set by the French Government.

Retail Price Index Enter a **Retail Price Index.** These amounts are set by the French Government.

Minimum Salary Guaranteed Indicate a **Minimum Salary Guaranteed** for this External Variable. These amounts are set by the French Government.

Disability Report Rate Prior to launching the Disability report, you should enter a **Disability Report Rate**. The rate is set by the French government and currently the rate is 6%. You would enter 0,06 in your system. The Disability Report Rate is set up in the External Variables Table and is used in the French Disability report (DIS001).

Social Security Ceiling

Enter a **Social Security Ceiling A, B,** or **C.** These Social Security Ceiling values are determined every year by the French Social Security Administration, and the values that you enter here act as the ceilings that you use to define different income brackets for French workers. They are also used as a reference for payroll calculations for French employees, as many types of social security contributions are calculated, based on the different social security income brackets into which an employee's salary falls.

For example, if you enter the following Social Security Ceilings for A, B, and C, and the Tax Rates for each bracket of income are as follows:

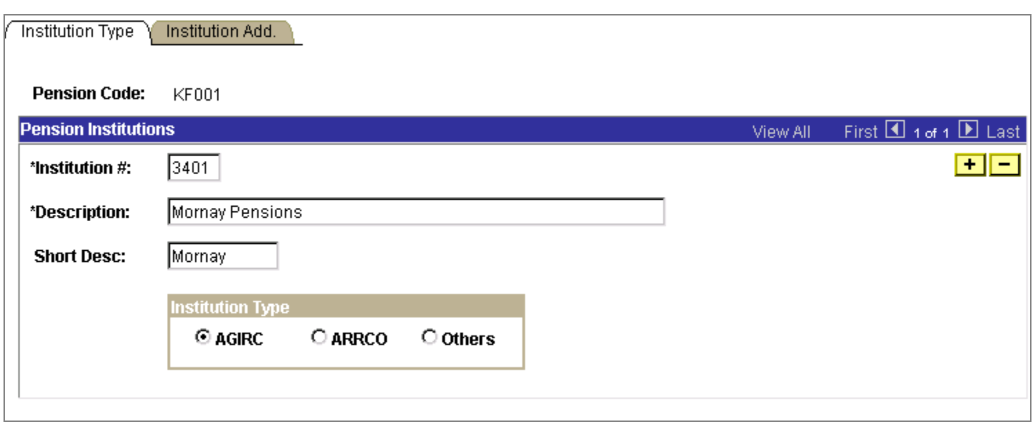
	Bracket A	*Bracket B*	*Bracket C*	*Above*
Ceiling	10000FF	30000FF	50000FF	
Tax rate	10%	15%	18%	20%

then an employee whose salary is 65000FF per month, based on this Social Security and Tax Rate scenario will be required to pay the following Social Security premium:

```
10000*10%+20000*15%+20000*18%+15000*20%
```

FRA Pension/Cont. Funds Table - Institution Type Page

Usage	Use the Institution Type page to enter the institution type and to describe the pension companies to which your employees make their pension contributions.
Object Name	PENS_FUNDS_FRA
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup Lcl, FRA Pension/Cont. Funds Table, Institution Type** • **Monitor Workplace, Report Regulations (FRA), Setup, Pension/Contingency Funds, Institution Type**
Prerequisites	None
Access Requirements	Pension/Contingency Funds Code



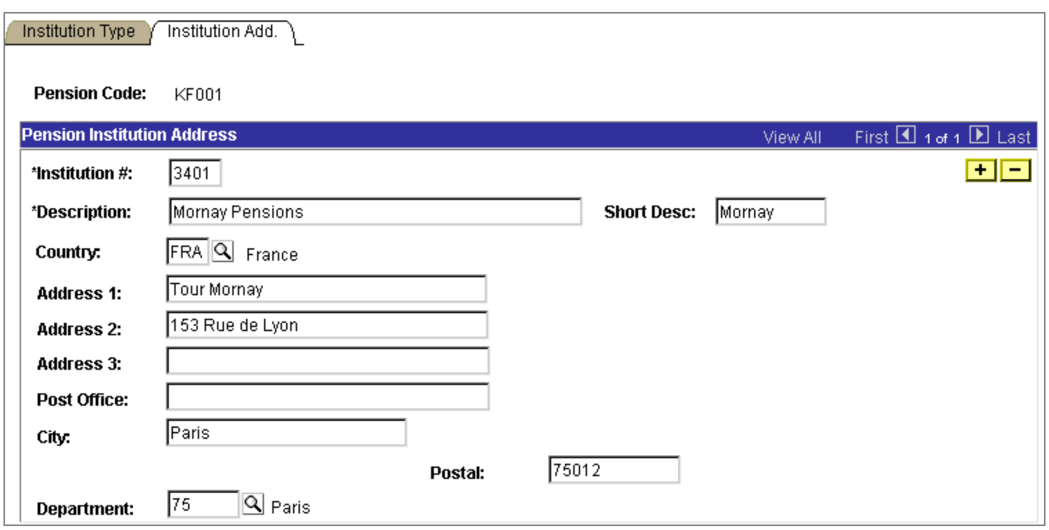
FRA Pension/Cont. Funds Table - Institution Type page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Short Description.**

Pension Code	System displays the Pension/Contingency Funds code that you entered.
Institution Type	Only one institution of each **Institution Type** is used in PeopleSoft Global Payroll. The **Institution Type** indicates which class of employee an institution is for. ***AGIRC*** - Pension funds for managers (Cadres) ***ARRCO*** - Pension funds for non-managers (Non-Cadres) ***Others*** - Contingency Funds

FRA Pension/Cont. Funds Table - Institution Add. Page

Usage	Use the Institution Add (Address) page to enter the Insurance Company's address information and to describe the insurance company to which your employees make their pension contributions.
Object Name	PENSION_FUND_FRA
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup Lcl, FRA Pension/Cont. Funds Table, Institution Address** • **Monitor Workplace, Report Regulations (FRA), Setup, Pension/Contingency Funds, Institution Address**
Prerequisites	None
Access Requirements	Pension/Contingency Funds Code



FRA Pension/Cont. Funds Table - Institution Add. Page

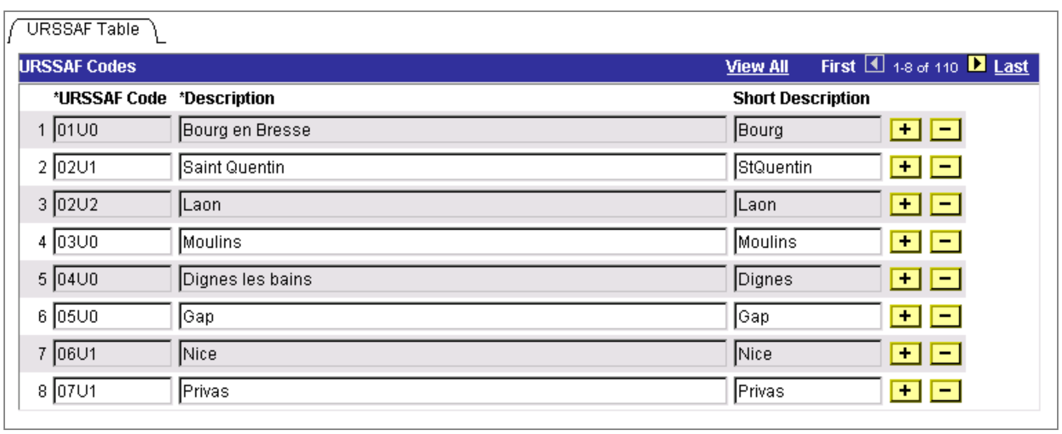
The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Short Desc (Description), Country, Address 1, Address 2, Address 3, City, County, Postal, State.**

Pension Code	System displays the Pension/Contingency Funds code that you entered.
Institution #	Enter the **Institution #.**

This information doesn't roll into PeopleSoft Pension Administration, which is a U.S. application.

URSSAF Table Page

Usage	Use the URSSAF Table page to set up URSSAF codes.
Object Name	URSSAF_TABLE_FRA
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup Lcl, FRA URSSAF Table, URSSAF Table** • **Monitor Workplace, Report Regulations (FRA), Setup, URSSAF Table, URSSAF Table**
Prerequisites	None.
Access Requirements	None



URSSAF Table page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description** and **Short Description.**

URSSAF Code (Union de Recouvrement de la Securite Social et des Allocations Familiales)	The URSSAF is a French administration that collects the employee and employer contributions for social security. This table stores the codes for the local URSSAF offices.

Setting Up German Control Tables

You must set up information in the German control table to track data for your German employees.

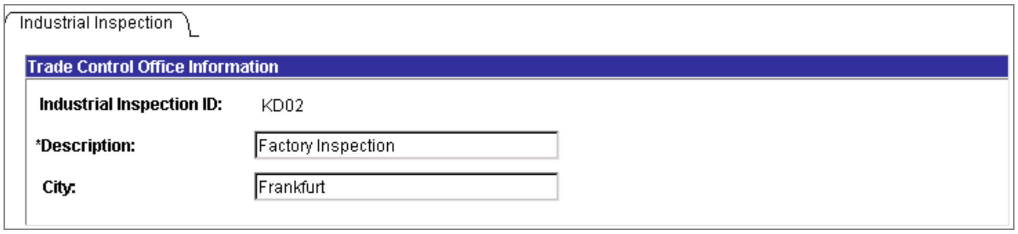
Enterprise Integration Point (EIP) Related to the Industrial Inspection Page

When you add, delete, or change industrial inspection information in the INDUST_INSP_GER record (of the Industrial Inspection page), the system automatically publishes the Industry Inspection Table - Germany EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the INDUST_INSP_GER record on the Industrial Inspection page.

For more information regarding the subscribers and technical details of the Industrial Inspection Table - Germany EIP, see Industry Inspection Table - Germany. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

GER Industrial Inspection Page

Usage	Use the Industrial Inspection page to set up German industrial inspection codes that you associate with locations in your organization. Industrial Inspection Codes aren't effective-dated and have no status.
Object Name	INDUST_INSP_GER
Navigation	**Define Business Rules, Manage Human Resources (GBL), Setup Lcl, GER Industrial Inspection, Industrial Inspection**
Prerequisites	None
Access Requirements	Industrial Inspection ID or Description



GER Industrial Inspection page

Trade Control Office Information

Description Enter the **Description** of the Industrial Inspection code. The system will display the description you enter here whenever you reference the Industrial Inspection code on any PeopleSoft HRMS application page.

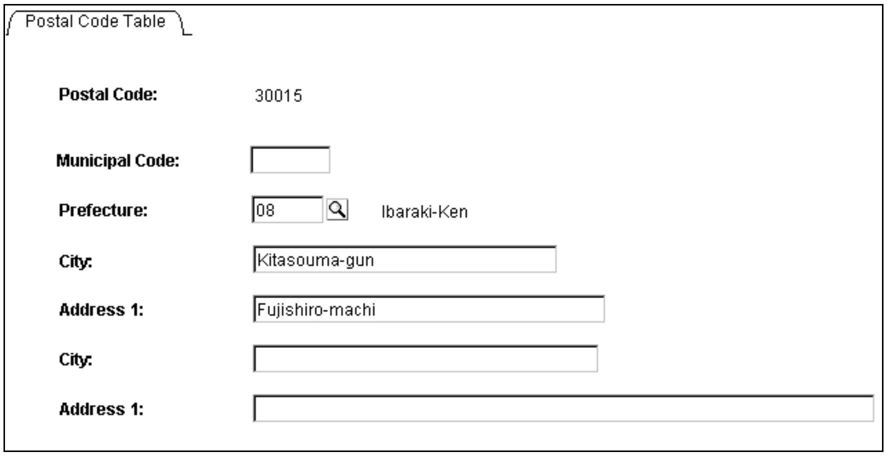
City Specify the **City** that is associated with this Industrial Inspection Code according to the German ***Berufsgenossenschaft.***

Setting Up Japanese Control Tables

You must set up information in the Japanese control table in order to make Japanese postal code data available in HRMS tables.

JPN Postal Code Table Page

Usage	Use the Postal Code Table page to enter information for Japanese postal codes to enable you to quickly complete standardized address information for any Japanese postal code in address pages throughout the PeopleSoft Human Resources system.
Object Name	POSTAL_TBL_JPN
Navigation	**Define Business Rules, Manage Human Resources (GBL), Setup Lcl, JPN Postal Code Table, Postal Code Table**
Prerequisites	None
Access Requirements	Postal Code



JPN Postal Code Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **City, Address 1.**

Postal Code System displays the **Postal Code** that you entered.

Municipal Code Enter a **Municipal Code** for the Japanese municipality that this postal code falls in.

Prefecture Select the appropriate **Prefecture** for this postal code from the valid Prefecture codes stored in the Prefecture Table.

Loading Dutch Postal Codes

You must load Dutch postal codes in order to make them available in HRMS tables.

NLD Load Postal Code Table Page

Usage	Use the Load Postal Code Table page to import postal codes into the NLD Postal Code Table in your human resources system. The Dutch Postal authority provides a full zip code table to which customers can subscribe. The NLD Load Postal Code Table Process loads all of the zip codes provided in a source file by the Dutch Post (PTT Post) into your human resources system.
Object Name	RUNCTL_POSTAL_NLD
Navigation	**Define Business Rules, Manage Human Resources (GBL), Proc Lcl, NLD Load Postal Code Tbl, Load Postal Code Table**
Prerequisites	None
Access Requirements	Run Control ID

NLD Load Postal Code Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Run Control ID.**

Report Request Parameters

Initial Postal Code Loadfile Enter the **Initial Zip Code Loadfile,** if you're adding Dutch Postal Code data to your system for the first time. This is the source file that you use to load Dutch zip code information into your human resources system. You need to indicate the path information to the file in the space provided.

Update Postal Code File Enter the **Update Zip Code File,** if you're doing a periodic update of the Dutch Postal Code Table. You need to indicate the path information to the source file in the space provided.

Click **Run** to run this request. Process Scheduler runs the NLD Load Postal Code Table process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Setting Up Spanish Control Tables

If you do business in Spain, you need to enter information required by the Spanish government about your organization's primary industry activity and the insurance company you use in the event of workplace accidents or illnesses.

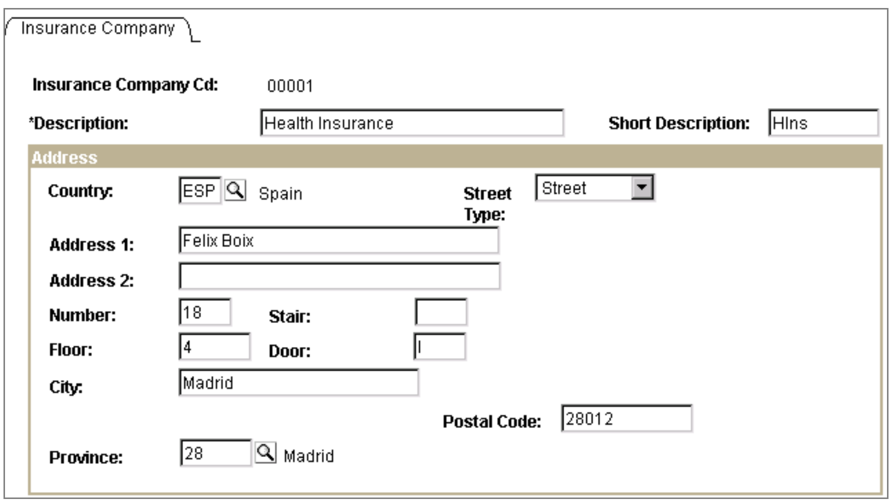
The Spanish government also requires every Spanish worker to belong to a Social Security Work Center. Employers use the Work Center number information to report employee information to the Spanish Social Security National Institute (Instituto Nacional de la Seguridad Social).

The pages you use to set up Spanish Social Security Work Centers are available in both the Manage Human Resources and the Administer Workforce menus.

For more information on setting up Spanish Social Security Work Centers, see Setting Up Spanish Workforce Tables.

ESP Insurance Company Table Page

Usage	The Spanish government requires employers to have an insurance company that covers workplace injuries. Use the ESP Insurance Company Table to enter information about your organization's insurance company.
Object Name	INSUR_COMP_CD_ESP
Navigation	**Define Business Rules, Manage Human Resources (GBL), Setup Lcl, ESP Insurance Company Tbl, Insurance Company**
Prerequisites	None
Access Requirements	Insurance Company Code



ESP Insurance Company Table page

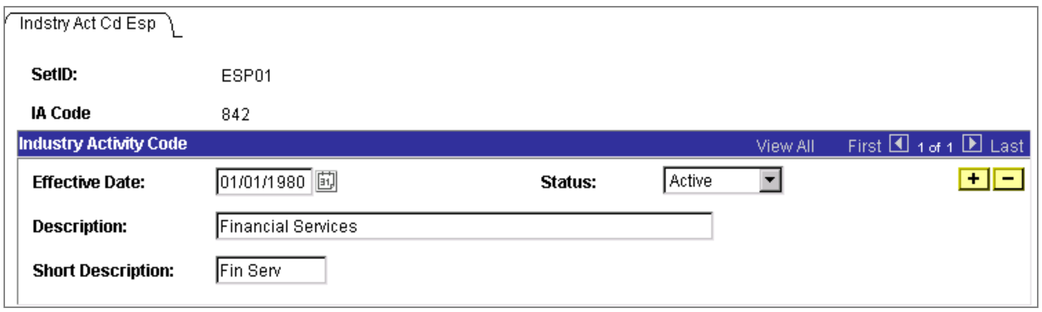
The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Short Description, Country, Street Type, Address 1, Address 2, Number, Stair, Floor, Door, City, Postal Code.**

Insurance Company Cd (code)	System displays the Insurance Company Code.

ESP Industry Activity Tbl Page

Usage	The Spanish Government requires every Spanish company to have an

	Industry Activity Code. Use the Industry Act (Activity) Cd (Code) Esp (Spain) page to define the codes your organization needs. You link the Industry Activity code to a company record on the Company Table - Default Settings Page.
Object Name	INDSTRY_ACT_CD_ESP
Navigation	**Define Business Rules, Manage Human Resources (GBL), Setup Lcl, ESP Industry Activity Tbl**
Prerequisites	None
Access Requirements	SetID or Industry Activity Code



ESP Industry Activity Tbl page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Effective Date, Status, Description, Short Description.**

IA (Industry Activity) Code System displays the **IA Code** that you entered.

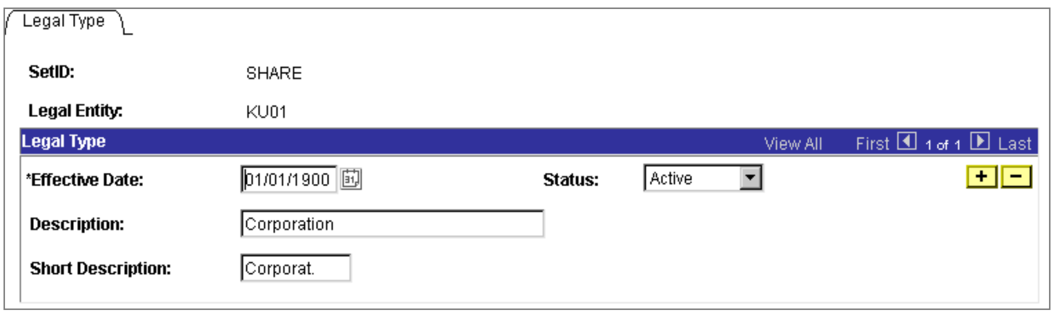
For more information on how Business Unit/SetID functionality affects your HRMS system and regulates control table and prompt table values, see ***PeopleSoft Application Fundamentals for HRMS:*** Regulating HRMS System Data.

Defining Legal Types

Many countries require you to report on your organization's legal structure–whether it's a corporation, a public limited company, a cooperative, or so forth. You define the legal entities that relate to your organization on the Legal Type Table.

Legal Type Page

Usage	Use the Legal Type page to define the types of legal entities your organization includes. You can associate the correct Legal Type with each company on the Company Table and use the information when you generate reports.
Object Name	LEGAL_TYPE_TBL
Navigation	**Define Business Rules, Manage Human Resources (GBL), Setup, Legal Type, Legal Type**
Prerequisites	None
Access Requirements	SetID and Legal Entity ID



Legal Type page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Effective Date, Status, Description, Short Description.**

Legal Entity	System displays the Legal Entity ID that you entered.

Entering Company Information

You use the Company Table to enter information on a single company or multiple companies within 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 need only enter information in the first page, Company Location, for each company you want to add. You can also choose to associate a default pay group with the company in Default Settings. The value you select will appear as the default in the Job Data pages for employees in this company. However, you'll probably find it easiest to treat each company you add as a separate tax entity, the same as if you were using PeopleSoft Payroll for North America.

For more information and for a detailed description of all Company Table pages, see PeopleSoft 8 Payroll for North America PeopleBook or PeopleSoft 8 Payroll Interface PeopleBook.

PeopleSoft Pension Administration tracks pension payees through retiree jobs that are separate from and concurrent with employees' active employment jobs. 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 you sponsor. Once you set up your retiree companies, you can match companies to pension plans in the Plan Administration component.

For more information about using pension companies to house pension payees, see Plan Administration – Funding Provider and Company Page.

If you're using PeopleSoft Global Payroll, you must enter additional, payroll-specific, company information in the Pay Entity page, if your pay entity is the same as company. You do this within the PeopleSoft Global Payroll application.

For more information about how pay entities are used in PeopleSoft Global Payroll, see Pay Entities.

After you define all the companies within your organization, you can verify that your company information is correct by running the Company Table report (PER707). This report includes the name and address of each company as well as payroll-related information, if specified.

Enterprise Integration Point (EIP) Related to the Company Table

The Company Table contains information on a single company or multiple companies within your organization from the corporate address to general ledger accounts, tax information, and payroll processing information. When you add, delete, or change company information in the PS_COMPANY_TBL record, the system automatically publishes the Company Table EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the PS_COMPANY_TBL record on the Company Table.

For more information regarding the subscribers and technical details of the Company Table EIP, see Company Table. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

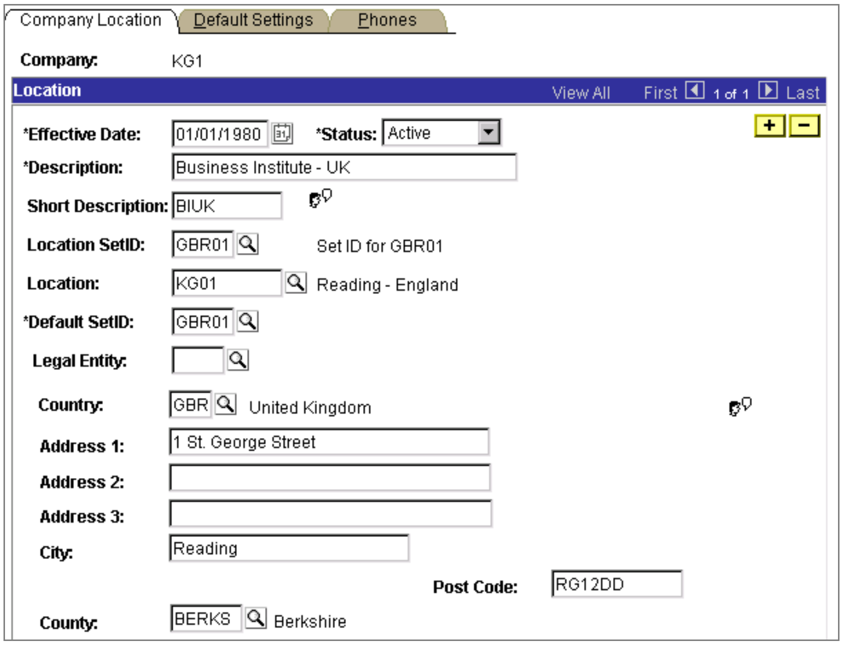
Special Considerations for U.S. Companies

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 record of anyone collecting benefits from that plan.

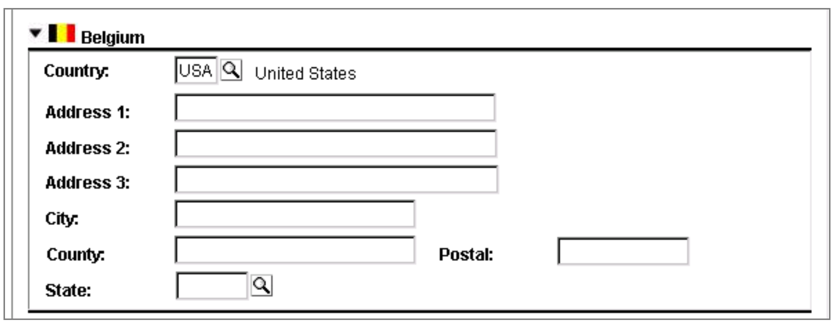
The Company Table component contains three pages. If your company uses PeopleSoft Payroll for North America, each company you add must be equivalent to each EIN you use. Thus your payroll staff will need to complete all three pages at least once to add a company EIN.

Company Table - Company Location Page

Usage	You define and describe companies on the Company Location Page. If you're setting up this table for a single-company environment, you only do this once; for multiple-company environments, you must set up a company code for each company.
Object Name	COMPANY_TABLE1
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Company Table, Company Location** • **Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Agency Location**
Prerequisites	None
Access Requirements	Company or Description



Company Table - Company Location page 1/2



Company Table - Company Location page 2/2

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Effective Date, Status, SetID, Description, Short Description, Country, Address 1, Address 2, Address 3, City, Post Code, County.**

Company The system displays your **Company.**

Location

Location SetID Select the **Location SetID** from the available options.

For more information on how SetIDs control the values you set up on the remaining prompt table fields on PeopleSoft pages, see PeopleSoft 8 Application Fundamentals for HRMS, "Regulating HRMS System Data"

Location Select the **Location** from the available options.

Legal Entity Select the **Legal Entity** from the available options.

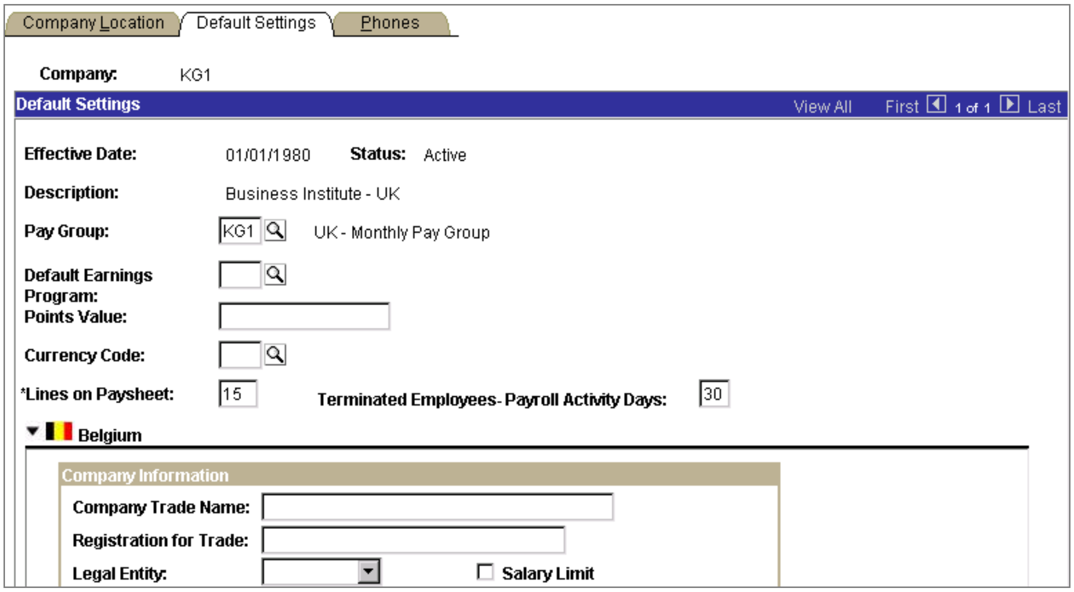
Belgium

Enter the address information for your Belgian companies here.

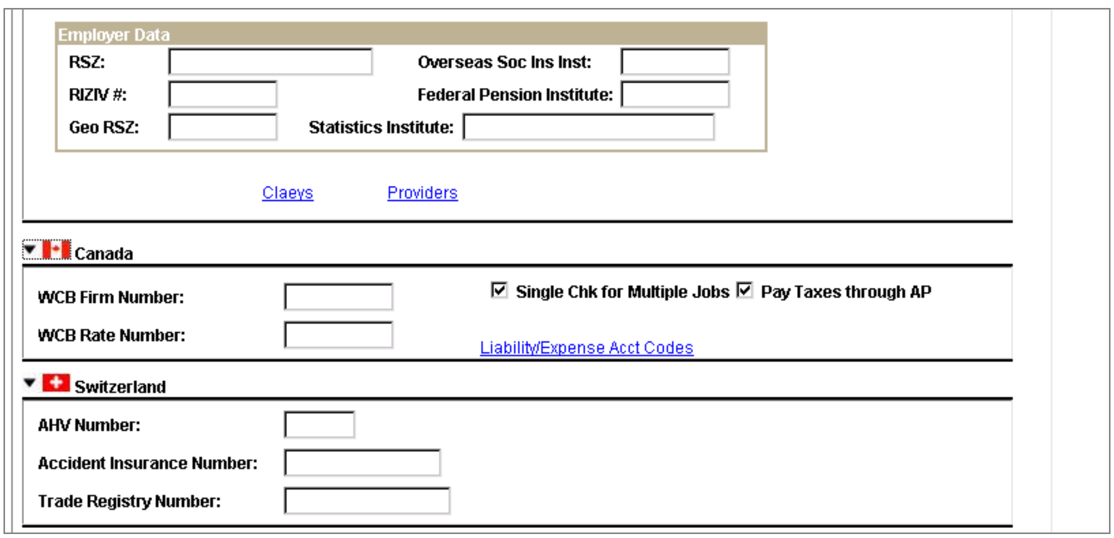
For more information about the automatic address formatting feature, see Country Table - Address Format Page.

Company Table - Default Settings Page

Usage	Use the Default Settings page to set up default information associated with companies, such as the company pay group, salary points values, and Claeys Formula factor defaults for Belgian companies.
Object Name	COMPANY_TABLE2_GBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Company Table, Default Settings** • **Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Default Settings**
Prerequisites	None
Access Requirements	Company or Description

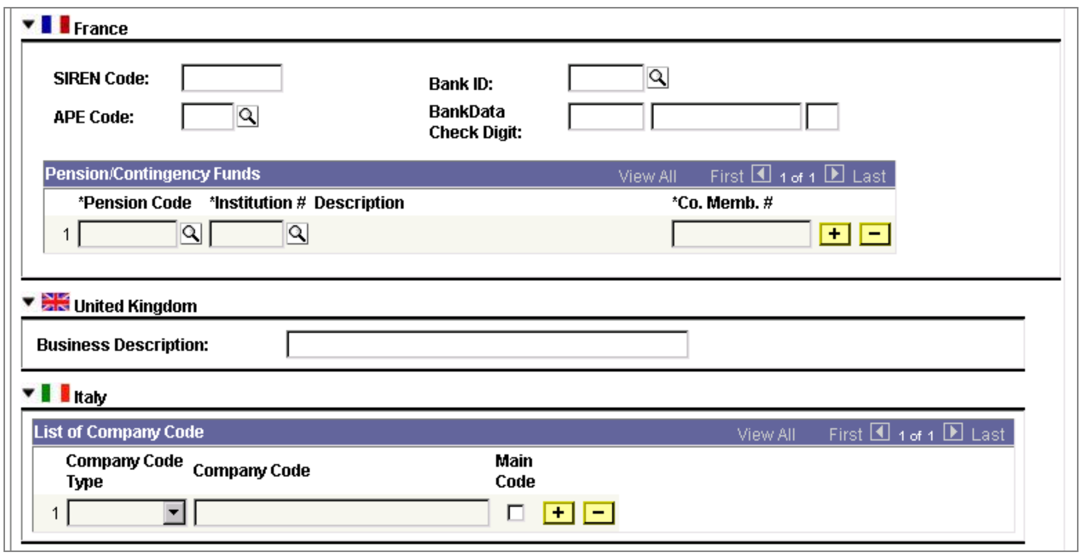


Company Table - Default Settings page 1/5

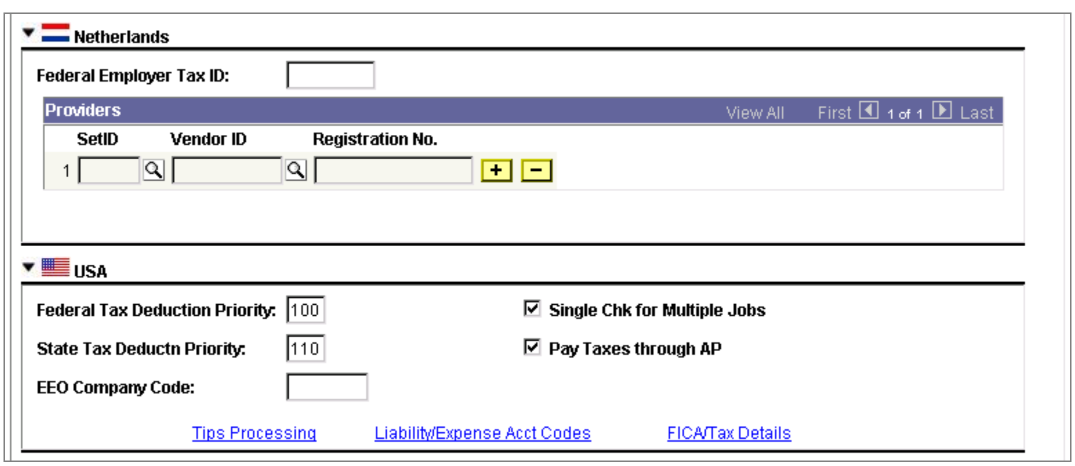


Company Table - Default Settings page 2/5

Company Table - Default Settings page 3/5



Setup - Company Table - Default Settings page 4/5



Setup - Company Table - Default Settings page 5/5

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Effective Date, Status.**

Company System displays the **Company** that you entered.

Defaults

Pay Group Select the default **Pay Group** from the available options. If you enter a value in this field, the pay group appears as the default for all employees in this company. This saves you data entry time at the employee level if most employees have the same pay group. You can override the default wherever necessary.

Note. The size of the Pay Group field varies depending on whether you use PeopleSoft Global Payroll or PeopleSoft Payroll for North America. You must first set up your Global or Payroll for North America pay groups to make them available here. Where you do that depends on which payroll application you use.

For more information about setting up a pay group for PeopleSoft Human Resources and PeopleSoft Payroll for North America, see Maintaining Pay Groups in this section. For more information about setting up pay groups for PeopleSoft Global Payroll, see PeopleSoft 8 Global Payroll

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Default Earnings Program Select the **Default Earnings Program** from the available options to indicate the default program for the company.

Points Value Enter the monetary value of your **Points.**

Lines on Paysheet Enter the number of lines for the **Paysheet.** Pay sheets serve as a repository for the data required to calculate employee pay for each pay period.

Terminated Employees Payroll Activity Days The system issues a warning if a terminated employee has payroll activity after the number of days specified here.

Belgium

Company Trade Name Enter your Belgian company, for example, Continental Commerce - Belgium.

Registration for Trade Enter the company's official registration number in the Belgian Trade Register.

Legal Entity	Select the **Legal Entity** from the available options. A **Legal Entity** is the legal form–***Inc*** (Corporation), ***Coop*** (Cooperative), and so forth–that applies to a company. The translate values reference different forms that you can choose to indicate whether the company is public or privately held, or of limited liability or not.
Salary Limit	Select this check box to set a maximum **Salary Limit**. The **Salary Limit** check box acts only as a point of reference in PeopleSoft Human Resources. While selecting the check box doesn't actually enforce any salary limits in the system automatically, you can use the **Salary Limit** check box as a reference to be consulted to prevent salary raises above company limits or during periods where increases aren't allowed. Companies can use salary limits to prevent any salary increases at all or limit what a salary increase can be, depending on your organization's business practices. Does your organization enforce certain periods where no salary increases are allowed, or limit the amount of a salary increase for an employee during a particular period? If so, you can modify the PeopleCode behind this page so that if you check this box, the system consults the **Salary Limits** check box to ensure that no raises are allowed during these periods.
RSZ	Enter a **RSZ** or State Social Insurance category. You can link certain **RSZ** categories in PeopleSoft Human Resources. The link between categories helps you determine the employee social insurance premium. This information is passed on to your payroll system and updates employee compensation.
Overseas Soc Ins Inst	Enter the company's **Overseas Soc Ins Inst** (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 #	Enter the **RIZIV #** number. It records the company's Federal Institute for Illness and Disability Insurance category.
Federal Pension Institute	Enter the appropriate **Federal Pension Institute**.
Geo RSZ	Enter the geographical location for the **RSZ** (State Social Insurance category).

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.
Claeys	Click this link to enter Claeys default and salary factor information on the Claeys page.
Providers	Click this link to enter Belgian Provider information for tracking third-party providers on the Providers page.

Canada

Enter a **WCB Firm Number** and a **WCB Rate Number,** if you are tracking WCB data for Canadian employees. Select **Pay Taxes through AP** to indicate if this company will be tracking its taxes through accounts payable.

For more information on WCB tracking, see Reporting to the Canadian Workers Compensation Board (WCB).

Click the **Liability/Expense Acct Codes** link to enter information about general ledger liability and expense account codes.

For more information on entering Liability/Expense Acct Codes, see your PeopleSoft Payroll for North America documentation.

Switzerland

AHV Number (Alters-und Hinterbliebenen Versicherung)	The number of the responsible AHV Compensation Office. This numeric code can be up to six characters.
Accident Insurance Number	The number assigned to the company by its accident insurance company. Use this number in health and safety reporting.
Trade Registry Number	The number assigned to the company by the Trade registry office. The correct format is ***999.9.999.999-9/***.

Germany

Indicate if **Works Council Admin(istration)** is **Required** for this German company. Depending on whether this check box is selected, the Works Council is involved in different Action/Action Reasons transactions that occur on the Job Record.

For more information on German Works Councils, see Entering German Works Council Decisions.

Check the **OECD** (Organization for Economic Cooperation and Development) **Permission Required** box, if appropriate for the company. Germany requires OECD Permission for workers from non-OECD countries to work in certain types of industry such as defense or high technology.

Indicate if a **Medical Checkup** is **Required** for your workers under German labor law.

Select an **Accident Insurance** code for this German company from the list of valid values. These values are stored on the Accident Insurance Table.

Enter the appropriate **Social Insurance Accident #.**

Enter the **Tax Unit** to be used for this German company.

Spain

Fiscal Identification Code	The Spanish government assigns every Spanish company a Fiscal Identification Code. Enter this company's code here.
Industry Activity Code	This code indicates to which industry this company belongs. Select the appropriate code from the available options. You maintain valid values on the ESP Industry Activity Table.
Insurance Company Code	Each Spanish company has an insurance company to represent it in work-related injury incidents. Select the appropriate code from the available options. You maintain valid values on the ESP Insurance Company Table.

France

Enter a **SIREN Code** for this organization and select an **APE Code.** The **SIREN Code** is assigned to a company when it registers as a business with the French government. This code isn't required for your human resources system, but is required on many company documents. The APE code serves as a classification of the type of industry the company is involved in–banking, software, insurance, and so forth. The APE Code is required by French law and must appear on all company regulatory reports.

You may also enter a **Bank ID. The Bank ID** you enter here acts as the default for your French company. You may also indicate the appropriate **BankData Check Digit.**

Select the **Pension Code** and **Institution #** for the pension companies used by this French company. Enter the **Co. Memb. #** (company membership number) assigned to this company when it registered with the pension company.

The system doesn't automatically check the format of the numbers you enter in these fields on this page.

UK

Enter the company **Business Description.** You enter **Business Description** information purely for reporting purposes, and the field is used on the two local UK RIDDOR reports, located in the Monitor Health/Safety menu. The system prints the business description of the relevant company from the job record of each employee.

For more information on RIDDOR reporting in PeopleSoft Human Resources, see Setting Up Reporting to the Health and Safety Executive (HSE) in the UK.

Italy page

Company Code Type	Select the **Company Code Type** from the list of available options.
Company Code	Enter the **Company Code** assigned to your company by the Italian regulatory authorities.
Main Code	Select the **Main Code** check box if this is the main **Company Code** to be used for reporting purposes.

Netherlands

Enter the **Federal Employer Tax ID.** This number is provided by the Dutch government.

Select a **SetID** and **Vendor ID** from among the valid insurance providers stored on the Vendor Table.

Enter the **Registration No.** (Number) for that provider. Your provider should supply you with the Registration Number.

The information that you enter here is for informational purposes only, but can be included in reporting or as information that you pass to your organization's payroll system.

USA

If you are using PeopleSoft Payroll for North America, enter the **Federal Tax Deduction Priority,** and the **State Tax Deductn Priority.** Otherwise, this information isn't required.

For more information on these fields, see your PeopleSoft Payroll for North America documentation.

If the U.S. government has assigned this company a code for EE0-1 and VETS100 reporting, enter the number in **EEO Company Code.**

Click the **Tips Processing** link to set up the parameters for handling tips within your company's environment if you are using PeopleSoft Payroll for North America.

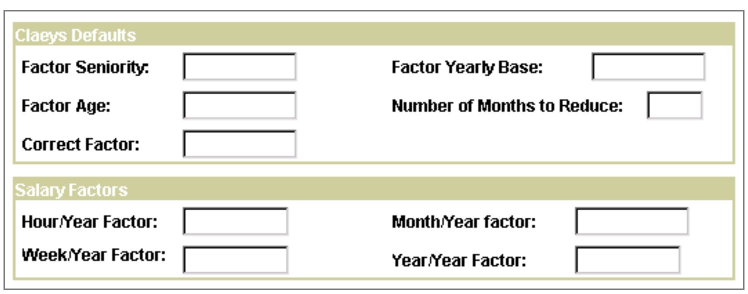
Click the **Liability/Expense Acct Codes** link to enter information about general ledger liability and expense account codes.

Click the **FICA/Tax Details** link to enter FICA and tax details.

For more information on entering Liability/Expense Acct Codes and FICA/Tax Details, see your PeopleSoft Payroll for North America documentation.

Company Table –Claeys Page

Usage	Use the Company Table – Claeys page to enter Claeys default information and salary factors used when performing Claeys Formula Calculations.
Object Name	COMP_TBL2ABEL_SBP
Navigation	Click the Claeys link on the Company Table - Default Settings page.



Company Table –Claeys page

Factor Seniority Enter the **Factor Seniority** for Claeys Formula Calculations in PeopleSoft Human Resources.

Factor Yearly Base Enter the **Factor Yearly Base** for Claeys Formula Calculations in PeopleSoft Human Resources.

Factor Age Enter the **Factor Age** for Claeys Formula Calculations in PeopleSoft Human Resources.

Number of Months to Reduce Enter the **Number of Months to Reduce** for Claeys Formula Calculations in PeopleSoft Human Resources.

Correct Factor	Enter the **Correct Factor** for Claeys Formula Calculations in PeopleSoft Human Resources.
Hour/Year Factor	Enter the **Hour/Year Factor** to calculate the hourly amount an employee earns and gross that amount up to the yearly total.
Month/Year Factor	Enter the **Month/Year Factor** to calculate the monthly amount an employee earns and gross that amount up to the yearly total.
Week/Year	Enter the **Week/Year** to calculate the weekly amount an employee earns and gross that amount up to the yearly total.
Year/Year	Enter the **Year/Year** to calculate the yearly total.

Note. In Belgium, the **Year factor** is set at ***13.85.***

For more information on setting up and performing the Claeys calculation for a Belgian employee, see Recording Belgian Contract Terms and Calculating Severance Pay.

Company Table - Providers Page

Usage	Use the Providers page to associate a provider with a SetID.
Object Name	COMP_TBL2BBEL_SBP
Navigation	Click the Providers link on the Company Table - Default Settings page.

Company Table - Providers page

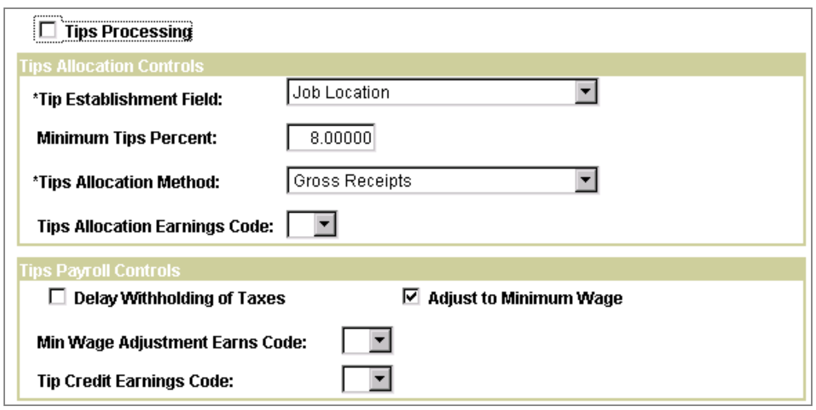
SetID	Select the **SetID** from the available options stored on the Vendor Table. The system lists all valid providers, not just Belgian providers.
Vendor ID	Select the **Vendor ID** from the available options stored on the Vendor Table. The system lists all valid providers, not just Belgian providers.
Affiliate	Enter the **Affiliate,** if applicable.

Registration No. Enter the **Registration No.,** if applicable.

For more information on setting up Provider IDs in PeopleSoft HRMS, see Setting Up Vendors.

Company Table - Tips Processing Page

Usage	Use the Tips Processing page to set up tip allocation.
Object Name	COMP_TBL6USA_SEC
Navigation	Click the Tips Processing link on the Company Table - Default Settings page.



Company Table - Tips Processing page

Select the **Tips Processing** check box to indicate use of this feature. Tip allocation is required when the amount of tips reported by tipped employees for a pay period is less than a specified percentage of an establishment's gross receipts for that period.

The **Tips Establishment Field** designates where the tips are acquired. Tips allocation is done for each establishment. An establishment is an individual restaurant, hotel, or a unique location. If a company has 15 restaurants, tips are allocated separately for each restaurant.

In **Minimum Tips Percent,** enter the minimum percentage of tips to be distributed to employees. The percentage specified by the federal regulations is 8%. 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%.

Enter the **Tips Allocation Method** to designate the method being used for this company. There are three valid allocation methods: ***Gross Receipts, Hours Worked,*** and ***Good Faith Agreement.*** There is a restriction on the use of the ***Hours Worked*** method: Only establishments that employ fewer than 25 employees (tipped and non-tipped) during a pay period may use this method.

Enter the **Tips Allocation Earnings Type.** Tips received from customers are either cash or credit card; click the arrow next to the entry field to display a list of valid values from the Translate table.

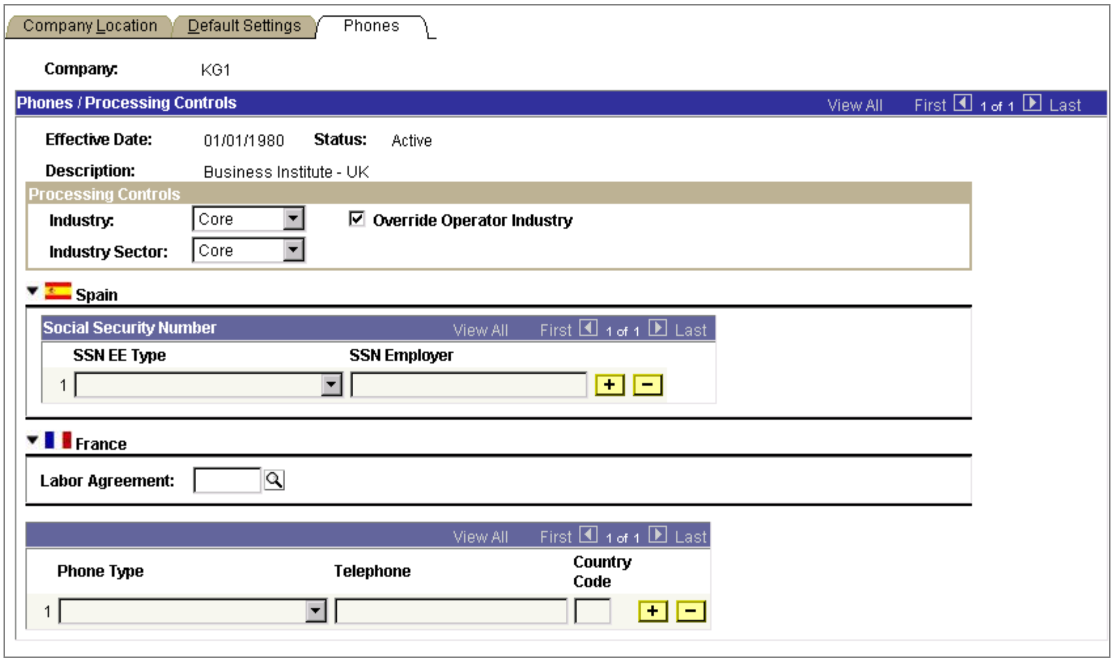
Select **Delay Withholding of Taxes,** if necessary. Allocated tips aren't subject to any tax withholding; however, the amount must be reported on the employee's W-2.

Select the **Adjust to Minimum Wage** check box if the tips received or collected don't meet the statutory minimum wage requirement.

Enter the **Tips Credit Earnings Type.** A tip credit is the difference between the statutory minimum wage and the minimum wage employers are allowed to pay tipped employees. There are both federal and state tip credits. The federal tip credit is 55% of the federal minimum wage. Not all states allow tip credit. In those that do, there is either a flat rate or a given percentage (ranging from 20% to 50%). In states that don't allow a tip credit, the minimum hourly rate is equal to the statutory minimum hourly rate, federal or state, whichever is higher; in those states where the tip credit is zero.

Company Table - Phones Page

Usage	Use the Phones page to enter telephone information for a company, such as type of telephone and the telephone numbers.
Object Name	COMPANY_TABLE3_GBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Company Table, Phones** • **Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Phones**
Prerequisites	None
Access Requirements	Company or Description



Company Table - Phones page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Effective Date, Status, Description, Phone.**

Company	System displays the **Company** that you entered.

Processing Controls

Industry	Select the company's **Industry.**
Override Operator Industry	Indicate if the operator industry can be overridden
Industry Sector	Select the company's **Industry Sector**.

Spain

SSN EE Type (Social Security Number for Employer Type)	Spanish companies can have three different types of **Social Security Numbers,** depending on the type of contracts they have with their employees. Select the appropriate type from the available options. The valid values are ***none, Part Time, Regular,*** or ***Training.*** You maintain valid values on the Translate table.
SSN Employer (Social Security Number for Employer)	The Spanish government assigns each employer a **Social Security Number.** Enter this company's number here.

France

Labor Agreement

Select a **Collective Labor Agreement Code** from the list of valid agreements.

Note. The French pension administration functionality isn't part of PeopleSoft Pension Administration.

Phone Type

Enter the **Phone Type,** such as ***Business, Home,*** and so forth. Click the arrow next to the data entry field for a list of valid values from the Translate table. The phone fields are effective-dated and scrollable so that you can enter multiple phone and maintain history data. You'll see this standard phone functionality on pages throughout the system.

Phone

Enter the **Phone** number in the standardized data entry field provided. The system automatically formats the phone number into the standard format. The phone fields are effective-dated and scrollable so that you can enter multiple phone and maintain history data. You'll see this standard phone functionality on pages throughout the system.

USF Entering Agency Information

You use the Agency Table to enter information on a single agency or sub-agencies within your organization-from the central agency address to general ledger accounts, tax information, and payroll processing information. Most of the pages contain Payroll data, and you can find detailed descriptions of these pages in your PeopleSoft Payroll for North America documentation.

If you're using only PeopleSoft Human Resources, you need only enter information in the first page, Agency Location Page, for each agency you want to add. You can also choose to associate a default pay group with the agency in Default Settings. The value you select appears as the default in the Job Data pages for employees in this agency. However, you'll probably find it easiest to treat each agency you add as a separate tax entity, the same as if you were using PeopleSoft Payroll for North America.

For more information on setting up the Agency Tables, see your PeopleSoft Payroll for North America documentation.

After you define all the sub-agencies within your organization, you can verify that your agency information is correct by running the Agency Table report (FGPER803). This report includes the name and address of each sub-agency as well as payroll-related information, if specified.

For more information on the Agency Table report (FGPER803), see USF Generating the Agency Table Report.

Special Considerations

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.

The Agency Table component contains nine pages. If your agency uses PeopleSoft Payroll for North America, each sub-agency you add must be equivalent to each EIN you use. Thus your payroll staff will need to complete all nine pages at least once to add an agency EIN.

Agency Location Page

You define and describe agencies on the Agency Location page. If you're setting up this table for an agency environment without subagencies, you only do this once. For agencies with subagency environments, you should set up an agency code for each subagency.

For a page discussion see the Company Location Page.

Default Settings Page

Use the Agency Table Default Settings page to associate a default pay group with and agency.

For a page discussion see the Default Settings Page.

Phones Page

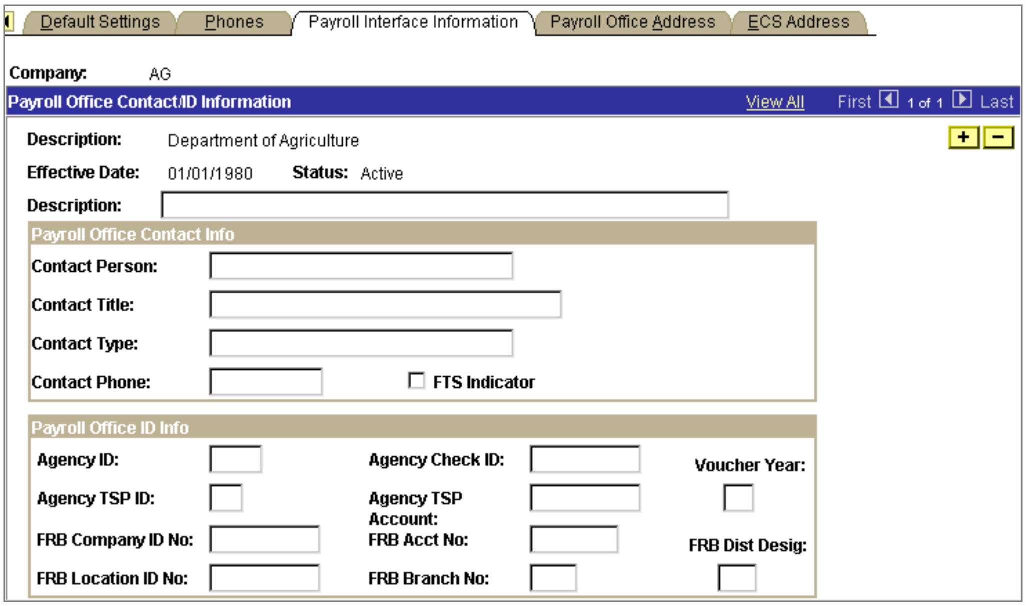
Use the Agency Table Phones page to enter phone information for an agency, such as type of phone and the telephone numbers.

For a page discussion, see the Phones Page.

Agency Table - Payroll Interface Information Page

Usage	Use the Payroll Interface Information page to enter payroll interface information.
Object Name	GVT_COMPANY_TBL7
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup,**

	Agency Table, Payroll Interface Information
Prerequisites	None.
Access Requirements	Enter a Company.



Agency Table - Payroll Interface Information page

Enter a **Description** of this payroll office.

Enter the Payroll Office Contact Information: **Contact Person, Title, Type,** and **Phone.** If this is an FTS Number, select the **FTS Indicator** check box.

Enter the Payroll Office Identification Information: **Agency ID, Agency Check ID,** and **Agency TSP ID.** Enter the **TSP Account** number and the TSP **Voucher Year.**

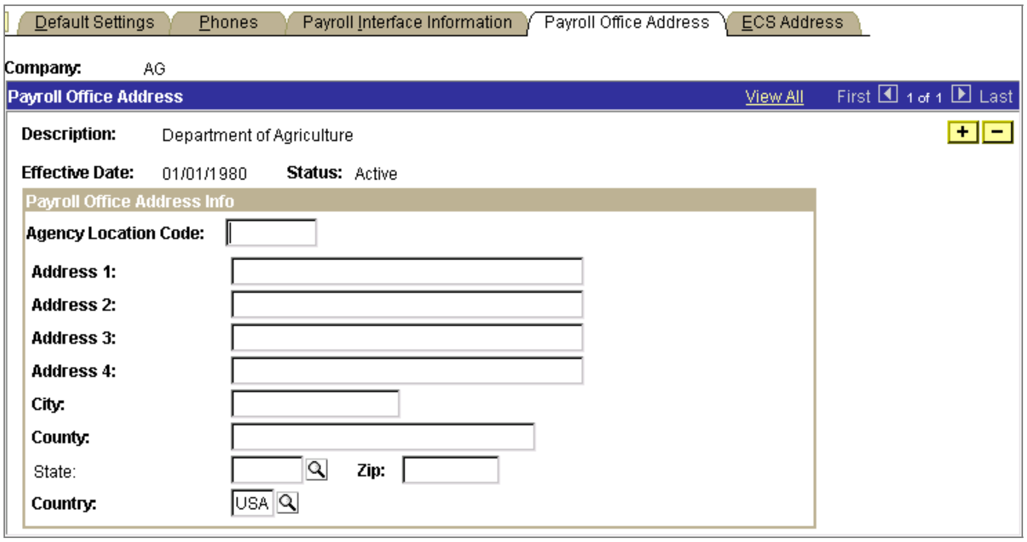
If necessary, enter FRB information: **FRB Company ID No., FRB Location ID No., FRB Acct. No., FRB Branch No.,** and **FRB Dist Desig.**

For more information on setting up the Agency Tables and payroll information, see your PeopleSoft Payroll for North America documentation.

Agency Table - Payroll Office Address Page

Usage	Use the Payroll Office Address page to enter payroll office address information for this agency.
Object Name	GVT_COMPANY_TBL8

Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Payroll Office Address**
Prerequisites	None.
Access Requirements	Enter a Company.



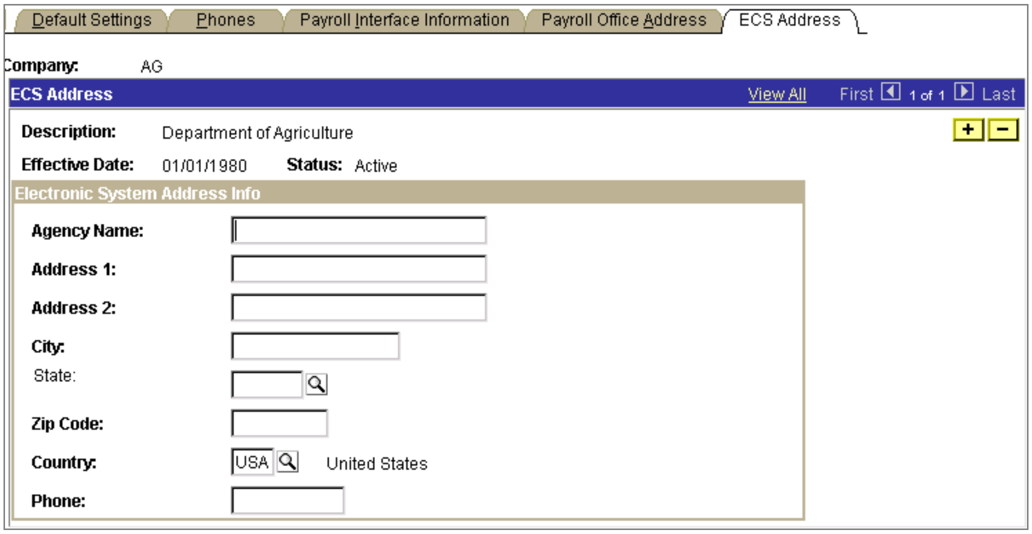
Agency Table - Payroll Office Address page

Enter the Payroll Office Address Information: **Agency Location Code** and the contact information.

For more information on setting up the Agency Tables, see your PeopleSoft Payroll for North America documentation.

Agency Table - ECS Address Page

Usage	Use the ECS Address page to enter the agency's electronic certification system information.
Object Name	GVT_COMPANY_TBL9
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, ECS Address**
Prerequisites	None.
Access Requirements	Enter a Company.



Agency Table - ECS Address page

Enter **Agency Name, Address** and **Phone** information.

Establishing Locations

Use the Location Table to establish physical locations within your organization, such as corporate headquarters, branch offices, remote sales offices, and so forth. If you use PeopleSoft Payroll for North America, you must set up one location for every taxing locality. Otherwise, you can designate locations using any groupings you like. 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'll need at least one location that's appropriate to use for your pension payees. You can use the same locations you use for employees, or you can create one or more locations specifically for pension payees. It's perfectly OK to 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 throughout PeopleSoft Human Resources reference the information you define in the Location Table. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to locations.

After you define all the locations within your organization, you can examine the list by running the Location Table report (PER705).

Enterprise Integration Point (EIP) Related to the Location Table

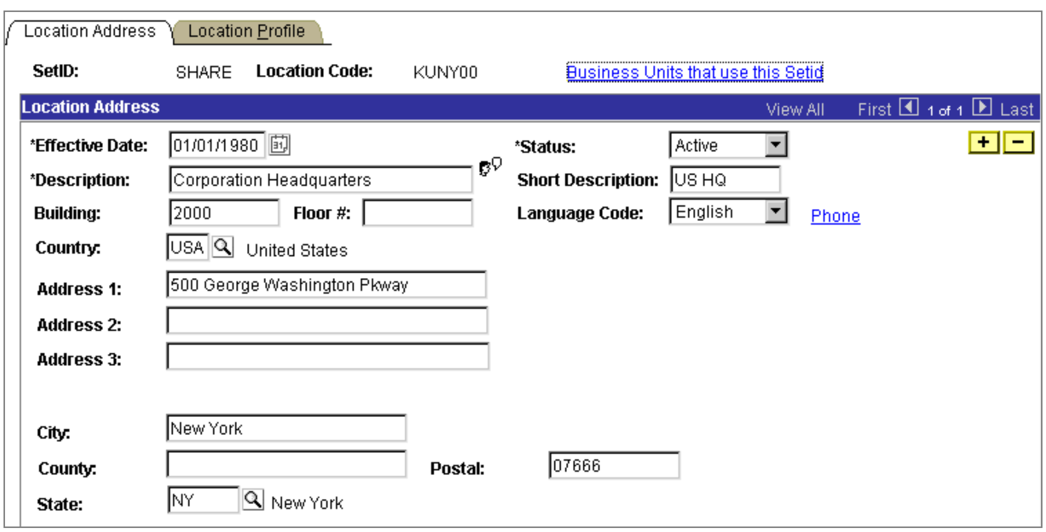
When you add, delete, or change location information in the PS_LOCATION_TBL record (of the Location Table), the system automatically publishes the Location Table EIP message to any other

PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the PS_LOCATION_TBL record on the Location Table.

For more information regarding the subscribers and technical details of the Location Table EIP, see Location Table. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

Location Table - Location Address Page

Usage	Use the Location Addresses page to enter physical locations within your organization, such as corporate headquarters, branch offices, remote sales offices, and so forth.
Object Name	LOCATION_TABLE1
Navigation	**Define Business Rules, Manage Human Resources (GBL), Setup, Location Table, Location Address**
Prerequisites	None
Access Requirements	Enter the appropriate **SetID** and **Location Code.**



Location Table - Location Address page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Effective Date, Status,**

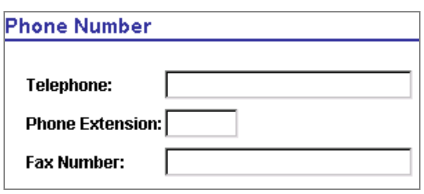
Description, Short Description, Country, Address 1, Address 2, Address 3, City, County, Postal, State.

Building	Enter the **Building** location, if applicable. For example, your corporate Headquarters could be located in Building 4 of an office park.
Floor #	Enter the **Floor #** location, if applicable.
Language Code	Enter the **Language Code** from the list of valid values from the Translate table, to indicate the official language to be used by this location.
Phone	Click this link to enter phone numbers.

For more information about the automatic address formatting feature, see Country Table - Address Format Page.

Location Table - Phone Page

Usage	Use the Phone page to enter phone numbers for the location addresses.
Object Name	BUS_PHONE_SEC
Navigation	To access the Phone page, click Phone link on the Location Address page.



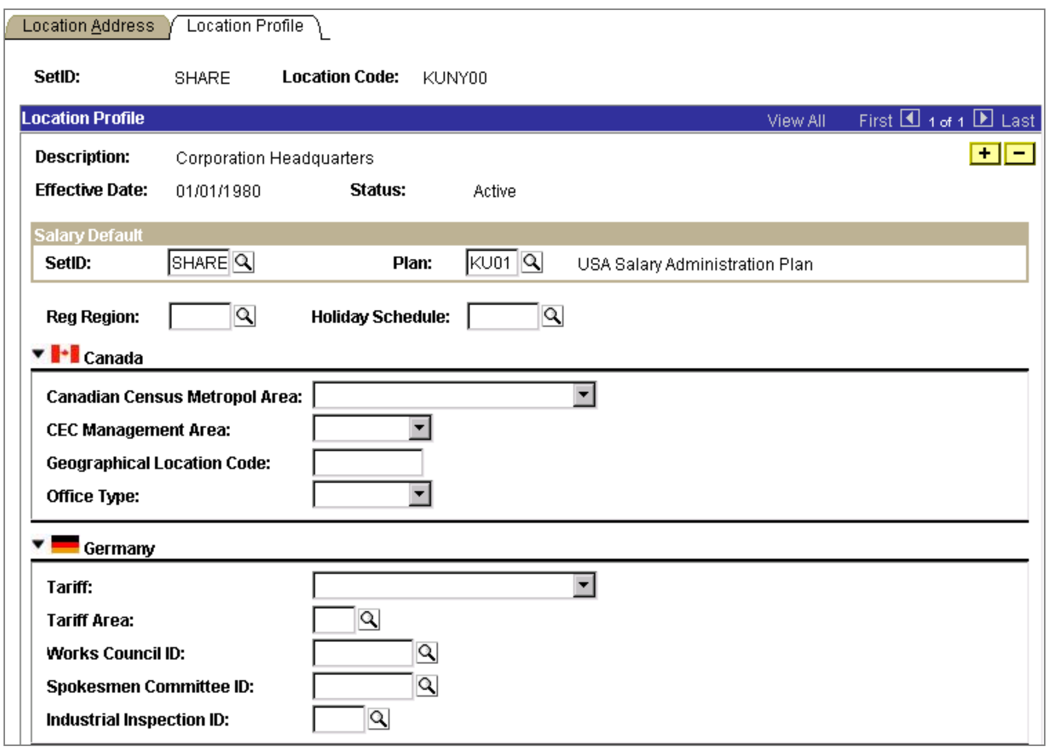
Location Table - Phone page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Telephone, Phone Extension, Fax Number.**

Location Table - Location Profile Page

Usage	Use the Location Profile page to specify a Salary Administration Plan for the location code, and tax and local country information for this location. You enter U.S. tax information on Canadian and German locations in this page.

	Note. PeopleSoft Payroll for North America references the Tax Location Table for location information (and PeopleSoft Pension Administration, in turn, references the PeopleSoft Payroll for North America tax information).
	For more information on the relationship between the Location Table and the Tax Location Table in PeopleSoft Payroll for North America, please see your PeopleSoft Payroll for North America documentation.
Object Name	LOCATION_TBL2_GBL
Navigation	**Define Business Rules, Manage Human Resources (GBL), Setup, Location Table, Location Profile**
Prerequisites	None
Access Requirements	Enter the appropriate **SetID** and **Location Code.**



Location Table - Location Profile page 1/2

Location Table - Location Profile page 2/2

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Description, Effective Date, Status.**

Location Code System displays the **Location Code** that you entered.

Plan Choose a Salary Administration **Plan** from the values you created in the Salary Administration Plan Table.

Tying a salary administration plan to a location helps you distinguish currency and cost-of-living differences for employees in the same Job Code. The importance of distinguishing these factors largely depends on how you've set up salary structures in your organization. If you don't need to distinguish salary administration plans by location, leave this field blank.

Note. You can only select plans associated with the SetID that you selected on the Salary Administration Plan Table. If you select a Salary Administration Plan in this page, the system uses this plan as the default value in Job Data pages for employees in this location. Otherwise it will use the Salary Administration Plan you enter in the Job Code Table.

Reg Region (regulatory region) Enter the Regulatory Region associated with this location, if any.

For more information on regulatory regions and how they are used by PeopleSoft HRMS applications, see PeopleSoft 8 Application Fundamentals for HRMS, "Processing Transactions Using Regulatory Regions"

Holiday Schedule Select a **Holiday Schedule** for this location from the valid values on the Translate table.

Note. The **Holiday Schedule** on the Location Profile page is for informational purposes only. It doesn't control defaulting when you hire an employee into a particular location. Holiday Schedule is controlled by the Pay Group to which a worker is assigned.

Canada

Canadian Census Metropol Area (Canadian Census Metropolitan Area)	The system enters the **Canadian Census** Metropol (Metropolitan) **Area** (CMA) code prescribed by Statistics Canada according to the address information you entered in Location Table 1, and which you can override if necessary. CMA refers to the main labor market area of an urbanized core with a population of at least 100,000. This field is required.
CEC Management Area (Canada Employment Center Management Area)	Select a **CEC Management Area** from the list of available options.
Geographical Location Code	Enter the appropriate **Geographic Location Code** for this location as defined by Statistics Canada.
Office Type	Select an **Office Type** from the list of available options.

If the Official Languages Act applies to your organization, use the information captured 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) you submit to the Canadian government.

For more information on the Official Languages Report, see Meeting Regulatory Requirements and Meeting Canadian Reporting Requirements.

Germany

Enter the **Tariff.** Tariff refers to the type of industry or business conducted at this location, such as banking, retail industry, printing, wood processing, and so forth. Valid values are stored on the Tariff Table.

Enter the **Tariff Area.** Valid Tariff Areas are stored on the Tariff Area Table.

When you enter an employee's location on the Job Table, the Tariff and Tariff Area default from the Location table, based on the values that you enter on the Location Table for this Location.

Select the **Works Council ID** and the appropriate **Spokesman Committee ID** for this Location.

When you enter an employee's location on the Job Table, the Spokesman Committee ID and Works Council ID default onto the employee's job record, based on the employee's location on the Job Table and the value of the Labor Type (Management, Non-Management) in the employee's Job Labor record.

Choose an **Industrial Inspection ID** for this Location from among the valid values on the Industrial Inspection Table, if appropriate. Industrial Inspection Codes are included on Incident and Illness Reports that record worker accidents and illnesses incurred on the job in the Monitor Health and Safety business process.

For more information on German Works Council IDs and Spokesman Committee IDs, see Overview of the German Works Council Business Process.

Spain

Social Security Work Center The Spanish government requires employers to link each location to a Social Security Work Center. Select the Work Center for this location from the available options. You maintain Work Center data in the ESP SS Work Center component.

Last Matricula Number Assigned The Spanish government also requires employers to assign each employee a unique Matricula number, which is used for government reporting. To avoid duplication of numbers, use this field to enter the **Last Matricula Number Assigned** at this location.

For more information about Social Security Work Centers, see Setting Up Spanish Workforce Tables.

UK

Select the check box if this is a **Northern Ireland Reportable** location.

Selecting this check box indicates that employees in this location need to be included in the community background report, the Fair Employment Monitoring Return, provided for Northern Ireland.

For more information on the Fair Employment Monitoring Return report, see List of Reports in PeopleSoft Human Resources. For more information about recording employee Community Background information, see Hiring Your Workforce.

USA

For U.S. companies, select a U.S. **Taxing Locality,** if any. The PeopleSoft Payroll for North America system uses this value to process payroll for employees at this location.

The U.S. **Establishment ID** pertains to EEO, OSHA, and other U.S. federal reporting regulations. You must make an entry in this field if this location is in the U.S. You define Establishment IDs in the Establishment Table.

For more information on how these fields impact payroll processing, see your PeopleSoft Payroll for North America documentation.

USF Establishing Locations

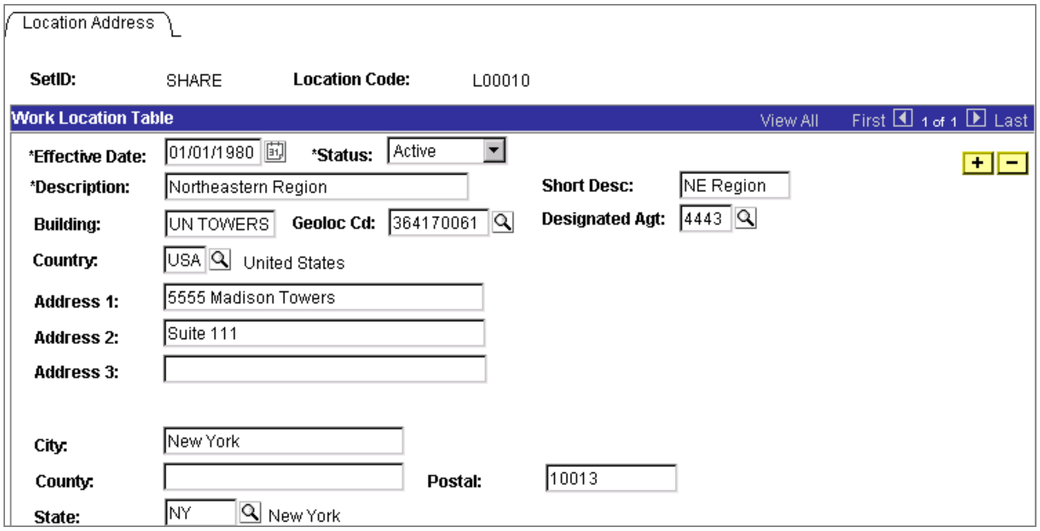
Use the Work Location Table to establish physical locations within your organization, such as agency headquarters, branch offices, regional offices, and so forth. If you use PeopleSoft Payroll for North America, you must set up one location for every taxing locality. Otherwise, you can designate locations using any groupings you like.

Various pages throughout PeopleSoft Human Resources reference the information you define in the Work Location Table. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to specific locations.

After you define all the work locations within your organization, you can examine the list by running the Work Location Table report (FGPER817). This report includes the information you defined for each location and is further described in PeopleSoft Human Resources Reports.

Work Location Table –Location Address Page

Usage	Use the Work Location page to add work locations.
Object Name	GVT_LOC_TABLE1
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Work Location Table, Location Address**
Prerequisites	You must have set up SetIDs.
Access Requirements	Enter a SetID and a Location Code.



Work Location Table - Location Address page

The **Effective Date** defaults to the system date, usually today's date, which you change unless you want this location code to go into effect today.

Enter a **Description, Short Desc** (Description), and the **Building** the location is in, if that is applicable. For example, your National Office could be located in the main building of your complex.

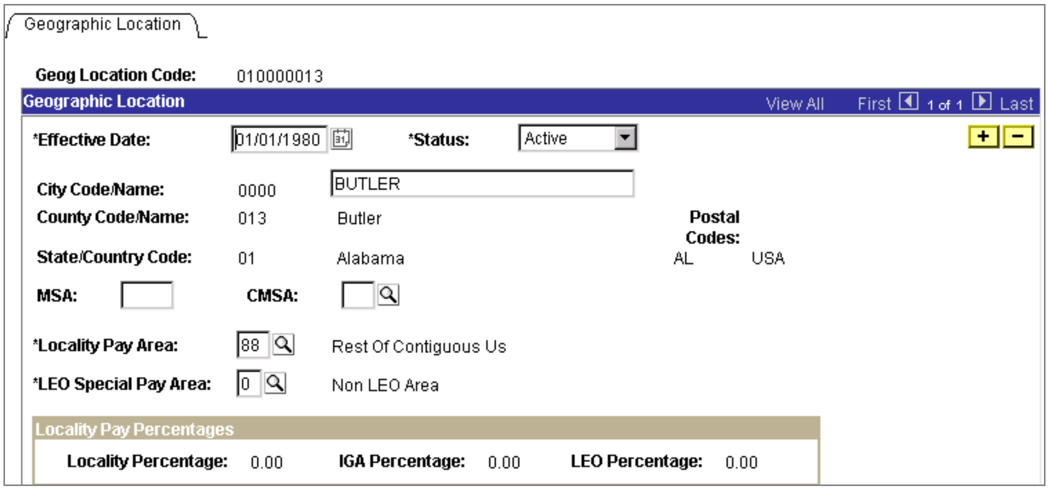
Enter the **Geoloc Cd** (geographical location code), which you define in the Geographic Location Table, and the **Designated Agt** (Agent) code.

Select a **Country** from the list of valid values and move out of the field. The system automatically displays the appropriate address fields for the country selected, using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields displayed.

For more information about the automatic address formatting feature, see Country Table - Address Format Page.

Geographic Location Table Page

Usage	Use the Geographic Location Table to define geographic locations.
Object Name	GVT_LOCATION
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Geographic Location Table, Geographic Location**
Prerequisites	None.
Access Requirements	Enter a Geog Location Code.



Geographic Location Table page

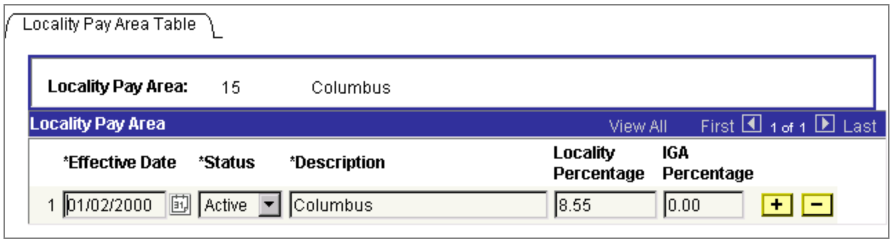
Enter the **City Code/Name,** the **MSA** and **CMSA.** Select a **Locality Pay Area** and **LEO Special Pay Area.**

PeopleSoft Payroll for North America references the Tax Location Table for location information.

For more information and a detailed discussion on the relationship between the Location Table and the Tax Location Table in PeopleSoft Payroll for North America, see your PeopleSoft Payroll for North America documentation.

Locality Pay Area Table Page

Usage	Federal employees in certain regions receive additional pay above their base pay. You define these regions in the Locality Pay Area Table. PeopleSoft delivers this data, but you need to update it, based on Office of Personnel Management (OPM) updates you might receive throughout the year.
Object Name	GVT_LOCAREA_TABLE
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Locality Pay Area Table, Locality Pay Area Table**
Prerequisites	None.
Access Requirements	Enter a Locality Pay Area.



Locality Pay Area Table page

Enter an **Effective Date** and **Status.** The **Effective Date** defaults to the system date, usually today's date, which you can change unless you want the **Locality Pay Area** to go into effect today. The **Status** defaults to ***Active.***

The first time you set up the table, we suggest you select an **Effective Date** early enough to accommodate your organization's oldest historical information. Add data rows and use the scroll bar, the **Effective Date,** and the **Status** to maintain history data for information that changes over time. For example, if you need to inactivate this **Locality Pay Area,** insert an effective-dated row with a status of Inactive.

Enter a **Description** of the Locality Pay Area and the **Locality Percentage.** This is the percentage of base pay employees in this region receive in addition to the base pay set by their pay plan, grade, and step. The actual amount is reflected on their Compensation Data page in Administer Workforce.

Enter the **IGA Percentage.**

Maintaining Departments

After you define company and location data for your enterprise, use the Department Table 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’re using 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.

The departments you create are also the foundation for building security for employee and pension payee data: granting and denying user access to rows of data in employee tables, categorized by department. To build security, you can use departments to set up a reporting hierarchy in a security tree in the Tree Manager. Once you set up your hierarchy of departments, you set up user security access and restrictions.

PeopleSoft Human Resources offers you two ways to access the Department Table to define and view departments: in the Manage Human Resources menu and in the Tree Manager. In this section, we discuss using the Department Table from within the Manage Human Resources menu.

For more information on working with Trees in PeopleSoft applications, see Tree Manager.

To generate a list of all existing departments on the Department Table, run the Department Table report (PER701). We describe this report further in Application Fundamentals Reports.

Standard PeopleSoft HRMS security uses department as the means of securing data, including all payroll data. If you're using PeopleSoft Payroll for North America or PeopleSoft Global Payroll and your departments don't reflect your security structure for securing access to employee data, you should use a different field for security.

For more information on employee data security, see Administering Security

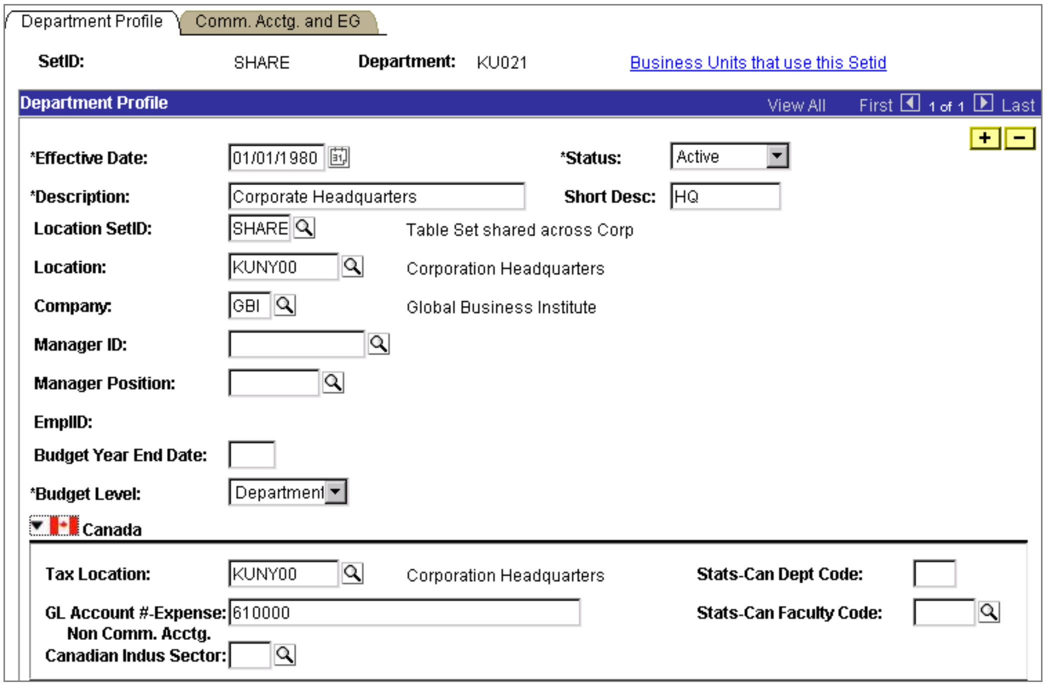
Enterprise Integration Point (EIP) Related to the Department Table

When you add, delete, or change department information in the DEPT_TBL record (of the Department Table), the system automatically publishes the Department Table EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the DEPT_TBL record on the Department Table.

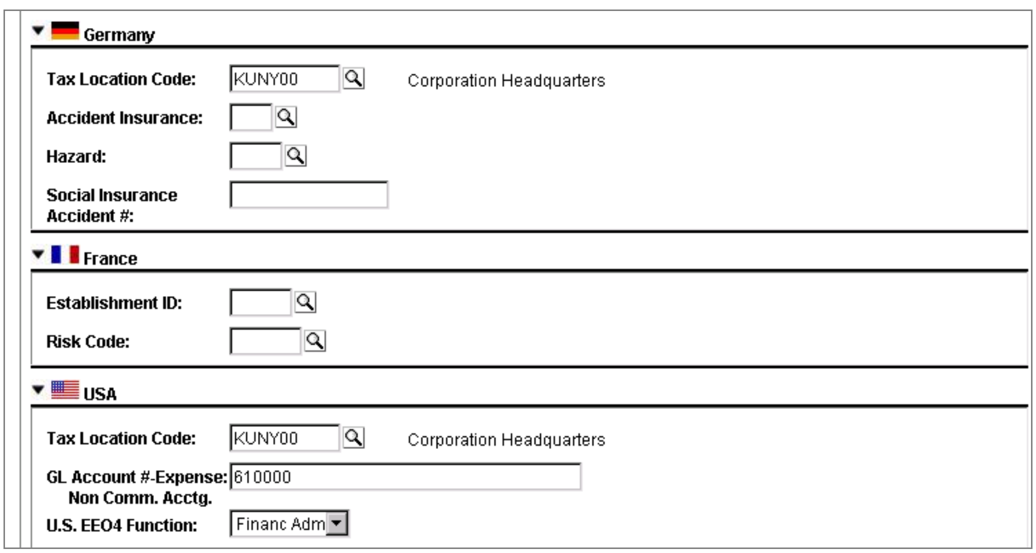
For more information regarding the subscribers and technical details of the Department Table EIP, see Department Table. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

Department Table - Department Profile Page

Usage	Use Department Profile to define basic information about a particular department
Object Name	DEPARTMENT_TBL_GBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Department Table, Department Profile** • **Define Business Rules, Manage Human Resources (USF), Setup, Department Table, Department Profile**
Prerequisites	None
Access Requirements	Enter a SetID and a Department.



Department Table - Department Profile page 1/2



Department Table - Department Profile page 2/2

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Status, Description, Short Desc (Description),EmplID.**

Effective Date

The **Effective Date** defaults to the system date, usually today's date, which you change unless you want the department code to go into effect today.

Note. If you add a new department to the Department Table from the Manage Human Resources menu, remember to set its **Effective Date** to predate (or be equal to) the effective date of your security tree.

Department System displays the **Department** ID that you entered.

Location SetID Select the **Location SetID.**

Location Indicate the **Location to which** this department belongs.

Company Indicate the **Company to which** this department belongs. The system uses the **Company** as the default company location on the job records for all employees associated with this department. In other words, if you hire employees into this department, the system assumes they are also employees of 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 in the Job Data pages.

Manager ID The **Manager ID** you select becomes the default Supervisor ID on the employee records of all employees assigned to this department. If you have more layers in your organization, you can override the default if you choose.

If you use partial Position Management–you only use positions for a portion of your organization–you can use either the **Manager ID** or **Manager Position** number. When you select either a **Manager ID** or a **Manager Position** number, the system disables the other field.

Manager Position If you use Position Management, once you created 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.

If you use partial Position Management–you only use positions for a portion of your organization–you can use either the **Manager ID** or **Manager Position** number. When you select either a **Manager ID** or a **Manager Position** number, the system disables the other field.

Note. The system currently allows you to select any position in **Manager Position.** If you want the system to prompt you only with positions in this department, update the DEPT_TBL in the Application Engine 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 **Budget Year End Date** for all positions in this department.
Budget Level	Indicate the **Budget Level**–***Department, Job Code, Line Item, Position Number,*** or ***None***–that defines budgeting for this department.

For more information on changing prompt tables, see Creating Record Definitions. For more information on budgeting using positions, see Maximizing Position Data.

Canada

Select a **Tax Location** for this Canadian department.

For more information on setting up Tax Locations for Canadian companies, see your PeopleSoft Payroll for North America documentation.

In **GL Account #-Expense,** enter the GL account to which payroll expenses for this department should be posted.

Select the code that identifies the **Canadian Indus**(trial) **Sector** with which employees in this department are associated for Canadian employment equity reporting purposes.

Enter a three-character **StatsCan-Dept (Statistics Canada Department)** code to be reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

Select a **StatsCan Faculty (Statistics Canada Faculty)** from the lists of available options to associate a faculty with a department. Faculty codes are set up on the StatsCan Faculty Code table and are used to associate medical and dental categories with faculties. The system uses the faculty code associated with this department to determine the medical and dental categories reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

Germany

Choose a **Tax Location Code** from among the list of valid values on the Tax Location Table.

For more information on how Tax Location Codes impact payroll processing for North America, see your PeopleSoft Payroll for North America documentation.

Select an **Accident Insurance** code, a **Hazard** Code, and a **Social Insurance Accident #.** These codes are used for monitoring Health and Safety business process functionality in PeopleSoft Human Resources.

For more information on Health and Safety functionality in PeopleSoft Human Resources and the use of this German Accident Insurance, Hazard Code, and Social Insurance Accident # information for a department, see Monitoring Additional Health and Safety Incident, Injury, and Illness Data For German Employers.

France

Choose an **Establishment ID** for this department. You define French Establishments on the French Establishment Table. French Social Security defines a risk code for your establishment, based on the number of Work Accidents that occurred in the past three years in a given establishment. Every establishment has to 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.

Select a **Risk Code** from among the valid risk codes stored on the Risk Code Table. You define your organization's percentage of contributions to the French Social Security fund at the department level, based on the **Risk Code** you enter here.

USA

Enter the **Tax Location**. Valid values are stored on the Tax Location Table.

In **GL Account #-Expense,** enter the GL account to which payroll expenses for this department should be posted.

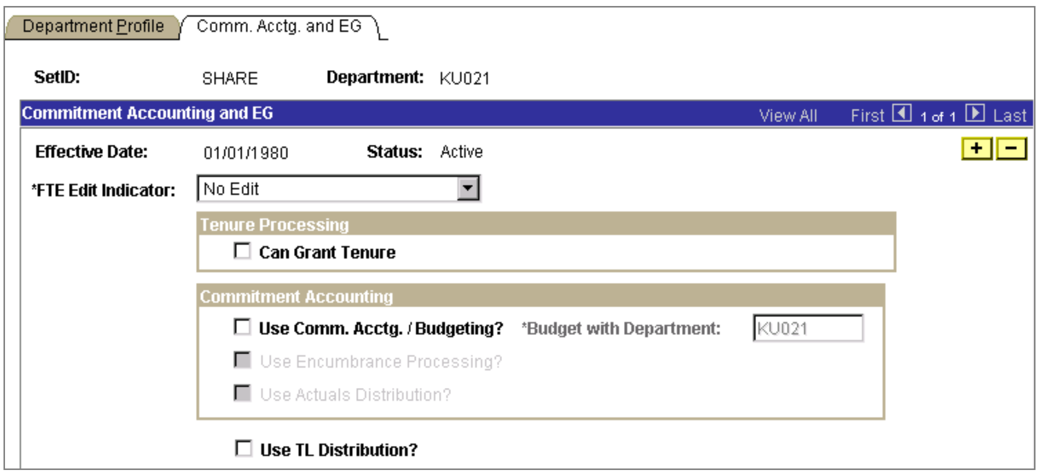
In **U.S. EEO4 Function,** select the functional category, such as health or fire protection, that applies to this department. The option you choose here impacts your EEO reporting to the U.S. Federal Government.

For more information, see your PeopleSoft Payroll for North America documentation.

Department Table - Comm. Acctg. and EG Page

Usage	Use the Comm. (Commitment) Acctg. (Accounting) and EG (Education and Government) page to enable and control a variety of department information specific to Education and Government customers and

	customers using the Commitment Accounting feature.
Object Name	DEPARTMENT_TBL_CA
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Department Table, Comm. Acctg. and EG** • **Define Business Rules, Manage Human Resources (USF), Setup, Department Table, Comm. Acctg. and EG**
Prerequisites	Department Table - Department Profile Page
Access Requirements	Enter a SetID and a Department.



Department Table - Comm. Acctg. and EG page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Effective Date, Status.**

Department Displays the **Department** number you entered in the search dialog box.

FTE 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***.

FTE budgets are established on the Department Budget FTE setup page.

Tenure Processing

Can Grant Tenure If you want to be able to grant tenure to qualified employees in this department, select the **Can Grant Tenure** check box.

For more information on tenure processing, see Tracking Faculty Events, "Tracking Tenure"

Commitment Accounting

Use Comm. Acctg. / Budgeting? (use commitment accounting/budgeting?)

Select the **use Comm. Acctg./Budgeting?** check box if you use Commitment Accounting processing for this department. When you select this check box, both the **Use Encumbrance Processing?** and **Use Actuals Distribution?** check boxes become available for entry and are automatically selected.

For more information about commitment accounting, see the *Managing Commitment Accounting* PeopleBook.

Use Encumbrance Processing?

Select the **Use Encumbrance Processing?** check box if you use Commitment Accounting encumbrance processing for this department.

Use Actuals Distribution?

Select the **Use Actuals Distribution?** check box if you use Commitment Accounting's actuals distribution process for this department.

Budget with Department

Enter the number of the department with which you want to budget this department. An accumulated budget for a group of departments rolls up to the department you enter here.

The department you select must be in the same SetID as the department you are defining and must be higher on the security tree. For example, if the departments 00010 and 00012 are lower on the security than department 00005 and have the same SetID, then departments 00010 and 00012 can **Budget with Department** 00005**.** The budgets for 00010 and 00012 role up into a single budget with 00005.

Distribute Prorate Option

When you choose to use actuals distribution, you can indicate how you want the system to calculate the proration of actuals across accounting periods. Select ***Cal Days*** to have the system use calendar days to calculate prorated amounts or select ***Work Days*** to have the system use work days.

Use TL Distribution?

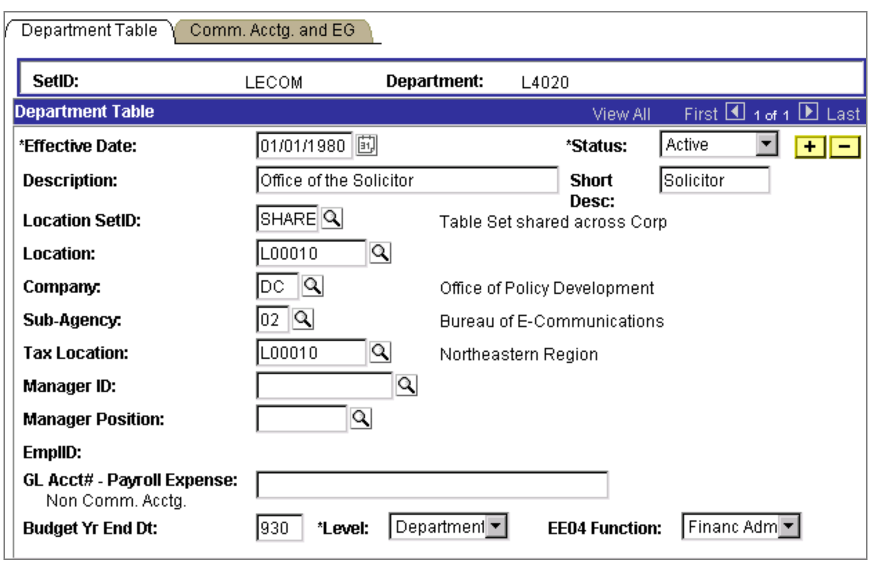
This field only applies to PeopleSoft Time and Labor customers. By selecting this option, you tell the system to take into account task information entered into PeopleSoft Time and Labor during Commitment Accounting's Actuals Distribution process.

If you select the **Use TL Distribution?** Check box, the Actuals Distribution process creates an entry for each Time and Labor task entry. It then distributes the earnings in the appropriate ration (the same ration used for Labor Distribution).

For more information about the Actuals Distribution process, see Managing Commitment Accounting, “Creating and Posting Actuals Data to PeopleSoft Financials”

USF Department Table Page

Usage	Use the Department Table page to set up departments.
Object Name	GVT_DEPART_TBL_USA
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Department Table, Department Table**
Prerequisites	You must have set up SetIDs.
Access Requirements	Enter a SetID and a Department ID.



Department Table page

The **Effective Date** defaults to the system date, usually today's date, which you change unless you want the department code to go into effect today.

Important! If you add a new department to the Department Table from the Manage Human Resources (USF) menu, remember to set its Effective Date to predate (or be equal to) the effective date of your security tree.

Enter a **Description** and **Short Desc** (Description) for this department.

Select the **Location SetID** and move out of the field. Indicate the **Location, Company,** and **Sub-Agency** to which this department belongs. The system uses the **Company** and **Sub-Agency** as the default agency/sub-agency location on the job records for all employees associated with this department. In other words, if you hire employees into this department, the system assumes 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 in the Job Data pages.

Enter the **Tax Location.** Valid values are stored on the Tax Location Table.

The **Manager ID** you select becomes the default Supervisor ID on the employee records of all employees assigned to this department. If you have more layers in your organization, you can override the default if you choose.

If you use Position Management, once 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 if an employee is assigned to the manager position.

If you use partial Position Management--you only use positions for a portion of your organization--you can use either the **Manager ID** or **Manager Position** number. When you select either a **Manager ID** or a **Manager Position** number, the system disables the other field.

The system currently allows you to select any position in **Manager Position.** If you want the system to prompt you only with positions in this department, update the DEPT_TBL in the Application Engine so that the prompt table for this field is DEPT_POSITIONS.

For more information on changing prompt tables, see Creating Record Definitions.

In **GL Account #-Payroll Expense,** enter the GL account to which payroll expenses for this department should be posted.

If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the **Budget Year End Date** for all positions in this department. Choose the ***Budget Level-Department, Job Code, Line Item, Position Number,*** or ***None*** to define budgeting for this department.

For more information on budgeting using positions, see Maximizing Position Data.

For the **U.S. EEO4 Function,** select the functional category, such as health or fire protection, that applies to this department. The option you choose here impacts your EEO reporting.

For more information about EEO Reporting, see your PeopleSoft Payroll for North America documentation.

USF Comm. Acctg. and EG

Use the Comm. Acctg. and EG (Commitment Accounting and Education and Government) page to set up the Commitment Accounting feature for this department. For a page discussion, see USF Comm. Acctg. and EG.

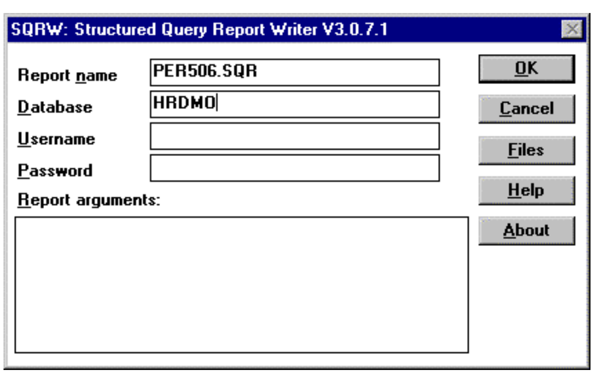
Cross-Checking Departments

When you add new departments in the Department Table, you must 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 an SQR audit (PER506) to determine which Department IDs are in the Department Table but not in the security tree. This SQR also lists the departments that are in the security tree but not in the Department Table. The latter situation might occur if you delete a department from the system but 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. To give you an idea of how the procedure works, here's how you run it from Windows 95.

1. Click the SQRW button.

2. Enter the SQR name, PER506.SQR, at the Report Name Prompt.



The SQR Structured Query Report Writer page

3. The SQR generates the audit.

For more information on generating and printing reports, see Introduction to PeopleSoft Reporting.

Defining Establishments

You use the Establishment Table 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, an Establishment has an address, is associated with a company, and is an entity 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 generally a physical place for which information is reported as a consolidated unit. Here are 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.

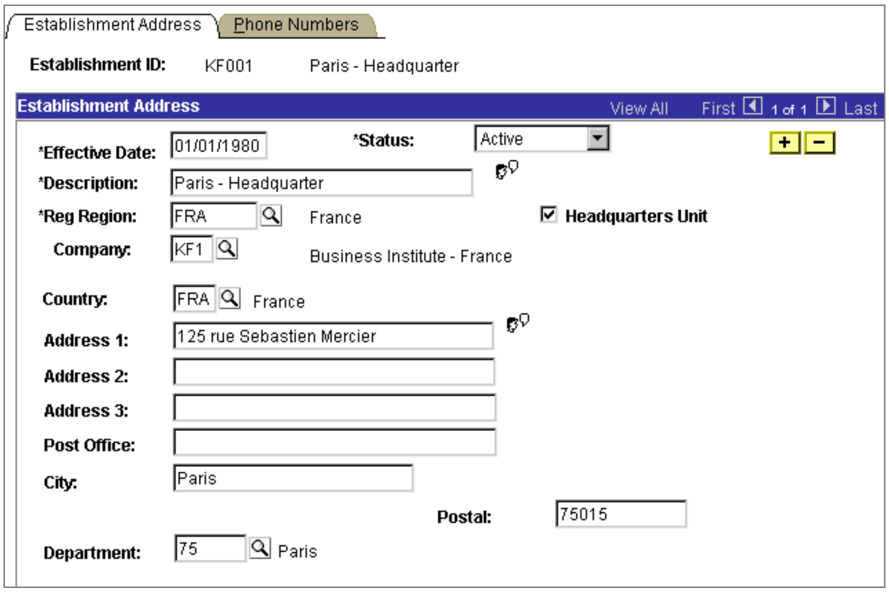
You need to define establishments in your PeopleSoft Human Resources system consistent with the particular regulatory requirements of your business operations.

For more information on how the Establishment Table is used for regulatory reporting in PeopleSoft Human Resources, see Meeting French Reporting Requirements and Meeting Reporting Requirements for the United States.

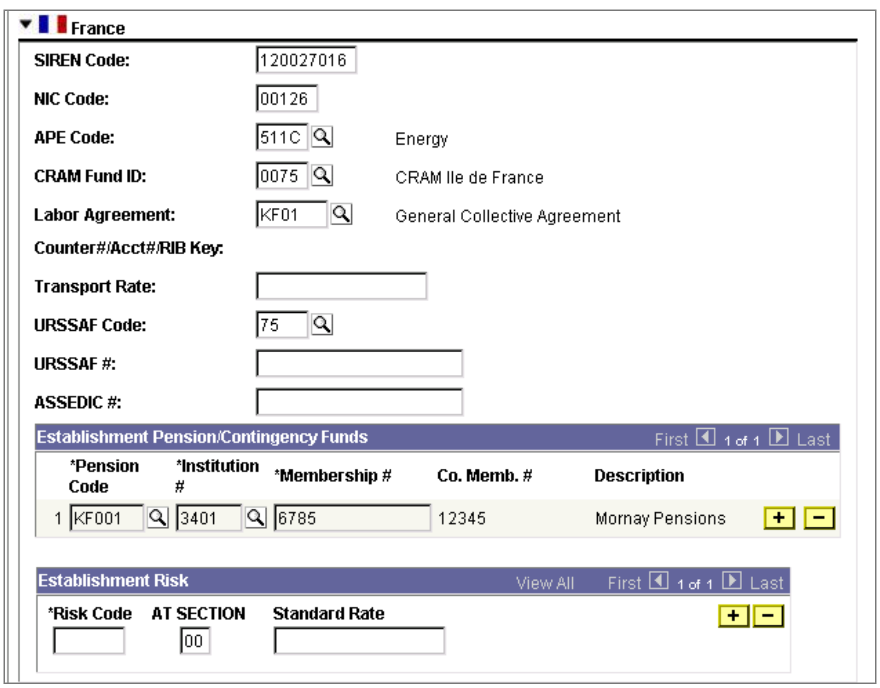
Establishment - Establishment Address Page

Usage	Use the Establishment Address page to create an information profile for each of your business establishments. In the Establishment Address page you identify the establishment, indicate its regulatory region, and enter the address.
Object Name	ESTAB_TBL1_GBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Establishment, Establishment Address** • **Define Business Rules, Manage Human Resources (USF), Setup, Establishment Table, Establishment Address** • **Monitor Workplace, Report Regulations (US), Setup, Establishment Table, Establishment Address** • **Monitor Workplace, Report Regulations (USF), Setup,**

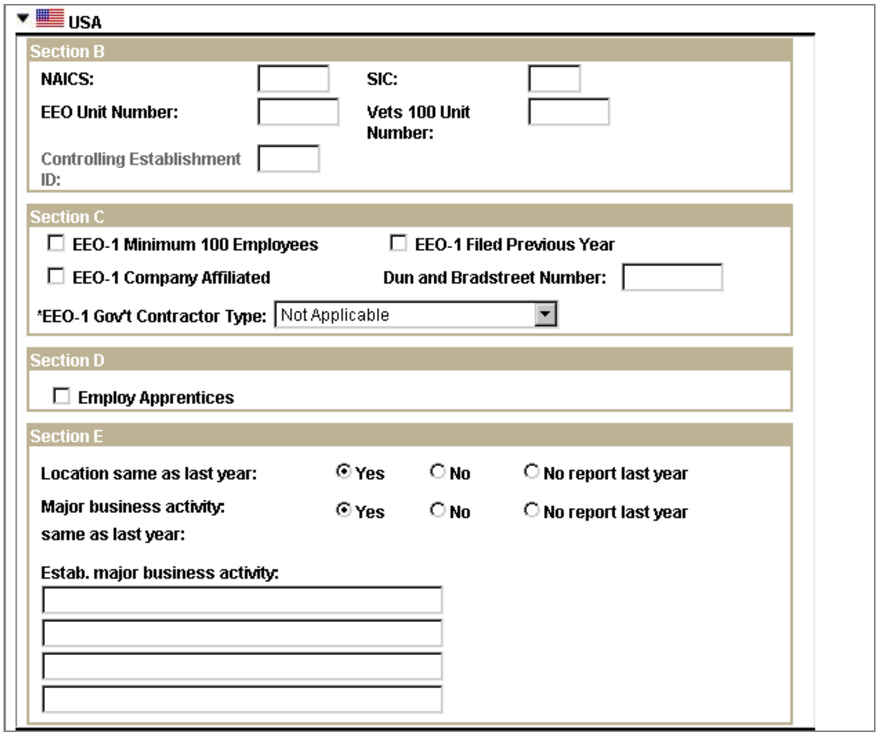
	Establishment Table, Establishment Address
Prerequisites	None
Access Requirements	Enter an Establishment ID.



Establishment - Establishment Address page 1/3



Establishment - Establishment Address page 2/3



Establishment - Establishment Address page 3/3

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Effective Date, Status, Description, Company, Address 1, Address 2, Address 3, City, County, Postal, State.**

Establishment ID	System displays the **Establishment ID** that you entered.
Headquarters Unit	Select the **Headquarters Unit** check box if the establishment you're defining is indeed your headquarters. You must designate at least one establishment in your company as the headquarters.
Reg (Regulatory) Region	Enter a **Reg Region** from the list of prompt values, which are from the Regulatory Region Table.
Country	Indicate the **Country** in which the establishment is located. The prompt values are from the Country Table.

Note. When you move out of the **Country** field, the system dynamically changes the address information that you record on the page, based on the Address profile for the country that you've defined on the Country Table.

France

Enter a **SIREN Code** for this organization. The SIREN code identifies the purpose of the establishment for reporting purposes in France and is assigned to a company when it registers as a business with the French government. This code isn't required for your human resources system, but it is required on many company documents. **SIREN** (Systeme Informatique pour le Repertoire des Entreprises) means Electronic List of Enterprises.

Enter the **NIC Code** for the establishment. NIC numbers identify the entities inside the same enterprise and represent an Internal Filing Number. **NIC** (Numero Interne de Classement) means Internal Number of Filing.

The **SIRET** (Systeme Informatique pour le Repertoire des Etablissements, or Electronic List of Entities) is an identifying number given to a French business by the INSEE (Institut National de la Statistique et des Etudes Economiques, 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. This number is used by the tax and social security authorities to identify a business enterprise and its entities.

Select an **APE Code** for this establishment. The APE code serves as a classification of the type of industry the company is involved in: banking, software, insurance, and so forth. The APE Code is required by French law and must appear on all company regulatory reports.

Indicate a **CRAM Fund ID.** CRAM (Caisse Regionale d'Assurance Maladie) is the regional social body which deals with the prevention of and compensation for industrial injuries. The CRAM office oversees the local CPAM (Caisse Primaire d'Assurance Maladie) offices that manage occupational health care coverage.

Enter the **Labor Agreement** for this establishment. Valid Labor Agreement codes for French organizations are stored on the Collective Agreement Table.

Enter the **Counter#**(Number)**/Acct #** (Account Number)**/RIB Key** information.

Enter the **Transport Rate.** The Transport is a statutory deduction. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. This deduction is used by the region to subsidize transportation and to maintain and build roads. PeopleSoft Global Payroll will use the **Transport Rate** you enter here.

Enter an **URSSAF Code.** The URSSAF is the body responsible for ensuring payment of Social Security contributions by all French employers. Then enter the appropriate **URSSAF #.**

For more information about using your PeopleSoft Human Resources system to meet French regulatory requirements, see Meeting French Reporting Requirements.

In the **Establishment Pension/Contingency Funds** group box, enter the **Pension Code** or **Institution #** of the pension companies used by this establishment. Enter the **Membership #** that the pension company assigned to this establishment when it registered.

In the **Establishment Risk** group box, enter the **Risk Code, AT Section,** and **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.

The **AT Section** stands for "Work Accident Section" (***Section Accident du Travail*****).** It's complementary information needed to identify the risk code by establishment.

For more information about using your PeopleSoft Human Resources system to meet French regulatory requirements, see Meeting French Reporting Requirements.

USA

Enter the **NAICS** code, the **EEO Unit Number,** and **Vets 100 Unit Number,** if any apply to this establishment.

Select any of the **EEO-1** check boxes that apply to this establishment and enter the **Dun and Bradstreet Number.**

EEO-1 Filed Previous Year defaults to selected. If you didn't file an EEO-1 report for this establishment last year, clear this check box.

Does this establishment employ apprentices? If so, select this check box.

Indicate whether your **Location** (was the) **same as last year** and whether your **Major business activity** (was the) **same as last year.**

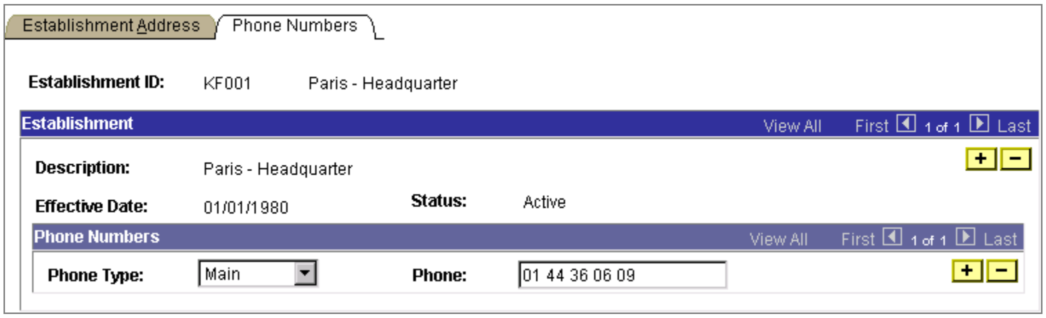
Enter a description of the **Establishment's major business activity.** Your description is limited to the four lines that appear on the page.

For more information about using your PeopleSoft Human Resources system to meet US regulatory requirements, see Meeting Reporting Requirements for the United States.

Establishment - Phone Numbers Page

Usage	Use the Phone Numbers page to enter the Establishment's telephone, facsimile machine, and other related numbers.
Object Name	ESTAB_TBL2_GBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Establishment, Phone Numbers** • **Define Business Rules, Manage Human Resources (USF), Setup, Establishment Table, Phone Numbers** • **Monitor Workplace, Report Regulations (US), Setup, Establishment Table, Phone Numbers** • **Monitor Workplace, Report Regulations (USF), Setup, Establishment Table, Phone Numbers**
Prerequisites	None

Access Requirements	Enter an Establishment ID.



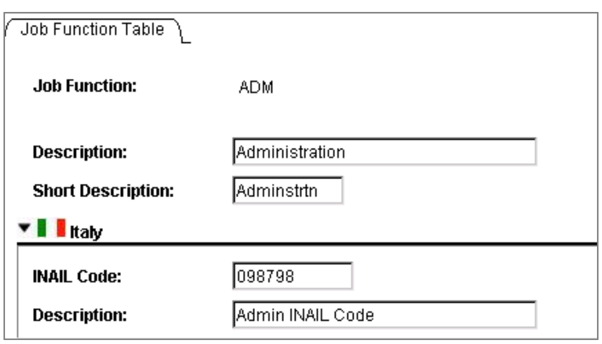
Establishment - Phone Numbers page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Effective Date, Status, Phone Type, Phone.**

Establishment ID System displays the **Establishment ID** that you entered.

Job Function Table Page

Usage	Use the Job Function Table page to set up and define job function codes.
Object Name	JOB_FUNCTION_TBL
Navigation	**Define Business Rules, Manage Human Resources (GBL), Setup, Job Function Table, Job Function Table**
Prerequisites	None
Access Requirements	Enter a Job Function code in the search dialog box.



Job Function Table page

The following fields are common to multiple pages and are defined in PeopleBooks Standard Page Element Definitions **Description, Short Description.**

Enter a **Job Function** code in the search dialog box. Use the description fields to describe the code.

Italy

Enter an **INAIL Code** (Istituto Nazionale per l'Assicurazione contro gli Infurtuni sul Lavoro). The **INAIL Code** classifies jobs according to the level of risk associated with the job and the related insurance required by the employer.

Classifying Jobs

Throughout PeopleSoft HRMS, you identify jobs by Job Codes, and you maintain information on jobs independently 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.

Many functions throughout PeopleSoft HRMS use Job Codes. For example, in recruitment you track open positions, interviews, and recruitment costs at the requisition level. When you hire an employee, you also enter the Job Code for the position filled, so you can link that employee record to the information you defined for that Job Code. When you assign an employee a Job Code on the Job Information page, much of the information that you enter there defaults into the employee's Job Data Record automatically. In addition, PeopleSoft Payroll for North America uses the data associated with Job Codes to calculate such payroll information as the number of hours of prorated holiday pay for part-time employees.

Understanding Job Codes and Positions in PeopleSoft HRMS

In PeopleSoft Human Resources, Job Codes are very different from positions: Within a single Job Code, you can have a number of positions. For example, you could have a Job Code representing Administrative Assistant, but within that Job Code, you could 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, and they usually have a one-to-one relationship with employees.

If you drive PeopleSoft Human Resources by position in your organization, you still use Job Codes to create general groupings or job classifications in your organization. You then use the Job Code groupings as the basis for default job data for positions.

If you use PeopleSoft Pension Administration, you need to set up jobs for your pension payees, but not for positions.

For more information on positions and position management, see Driving Your System by Employee or Position and Setting Up Positions.

The Job Code Table contains four pages. On the first page, you enter job descriptions and compensation information. On the second page, you quantify job evaluation criteria for determining compensation structures. On the third page you identify default compensation information related to the job code, and on the fourth page you define non-base compensation data related to the job code.

Most of this information isn't relevant to pension payee jobs. Pension benefits aren't tied to the compensation information in the Job Code. When you set up the jobs for your pension payees, either leave the fields blank or, for required fields, enter dummy data.

After you complete the Job Code Table for all jobs in your organization, you can generate the Job Code Table reports (PER709A, PER709B, PER709C, or FGPER823), which provide summaries of the information you defined for each Job Code. PER709A lists U.S.-specific fields on the Job Code Report, such as EEO information. PER709B is a Canadian Job code listing report with information specifically for Canadian regulatory reporting. The PER709C report provides a global listing of all Job Codes. The FGPER823 provides a summary of the Federal Job Codes.

Enterprise Integration Point (EIP) Related to the Job Code Table

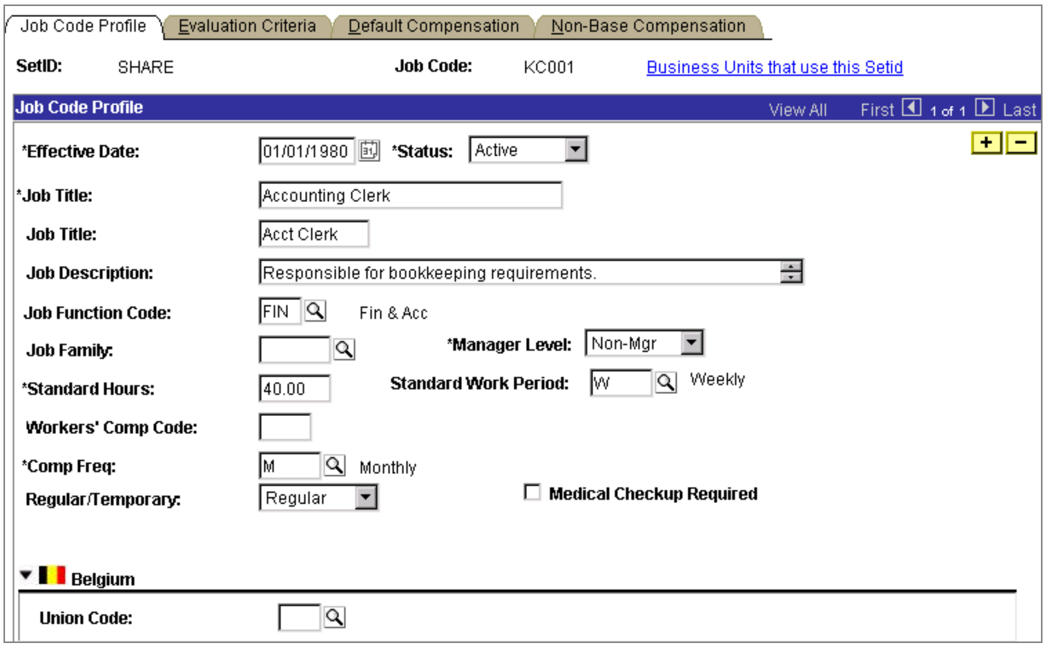
The Job Code Table contains information on the various jobs in a company. When you add, delete, or change job information in the PS_JOBCODE_TBL record (of the Job Code Table), the system automatically publishes the Jobcode Table EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the PS_JOBCODE_TBL record on the Job Code Table.

For more information regarding the subscribers and technical details of the Department Table EIP, see Department Table. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

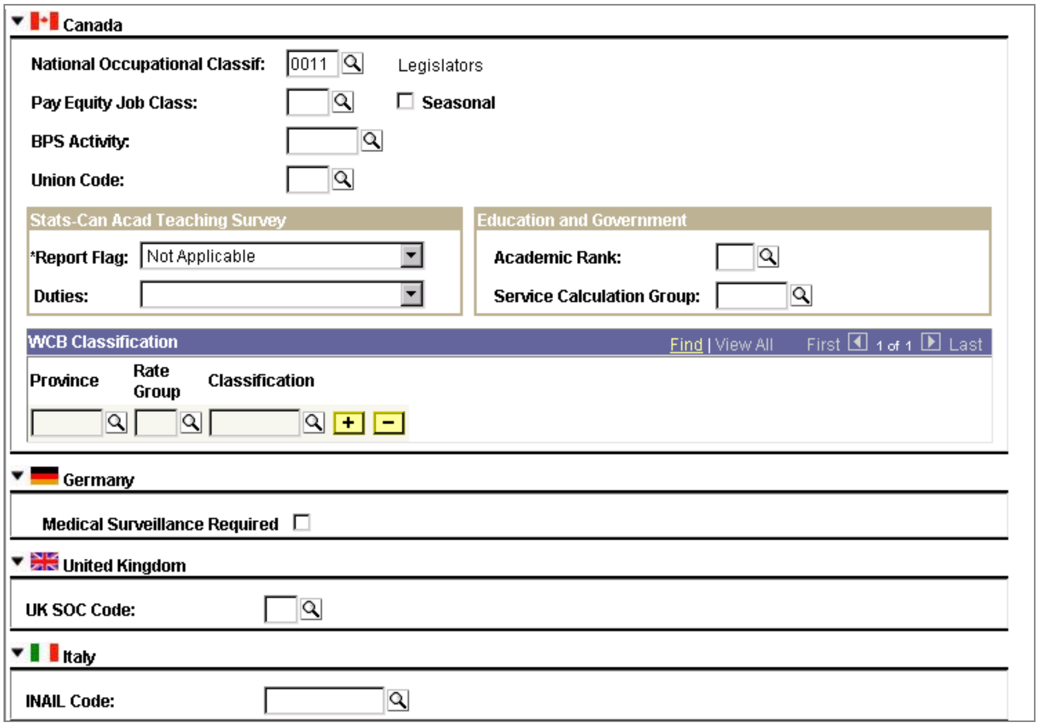
Job Code Table - Job Code Profile Page

Usage	Use the Job Code Profile page to add new Job Codes to the system and define job family, compensation, and regulatory information for this Job Code.
Object Name	JOBCODE_TBL1_GBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Job Code Profile** • **Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Job Code Profile** • **Develop Workforce, Plan Careers, Setup, Job Code Table, Job**

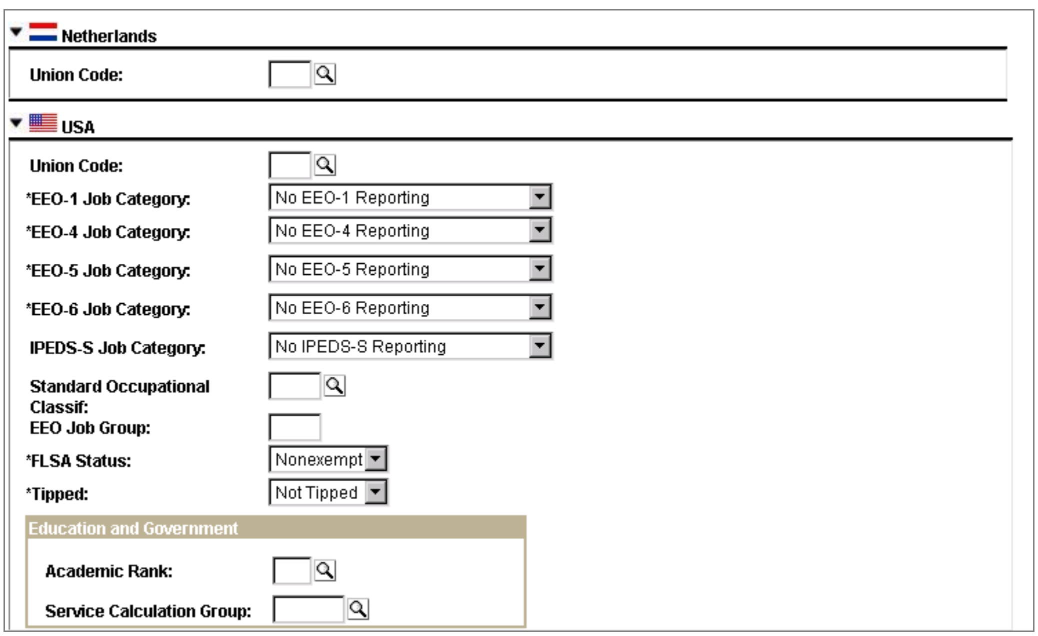
	Code Profile
Prerequisites	You must have set up SetIDs.
Access Requirements	SetID or Job Code



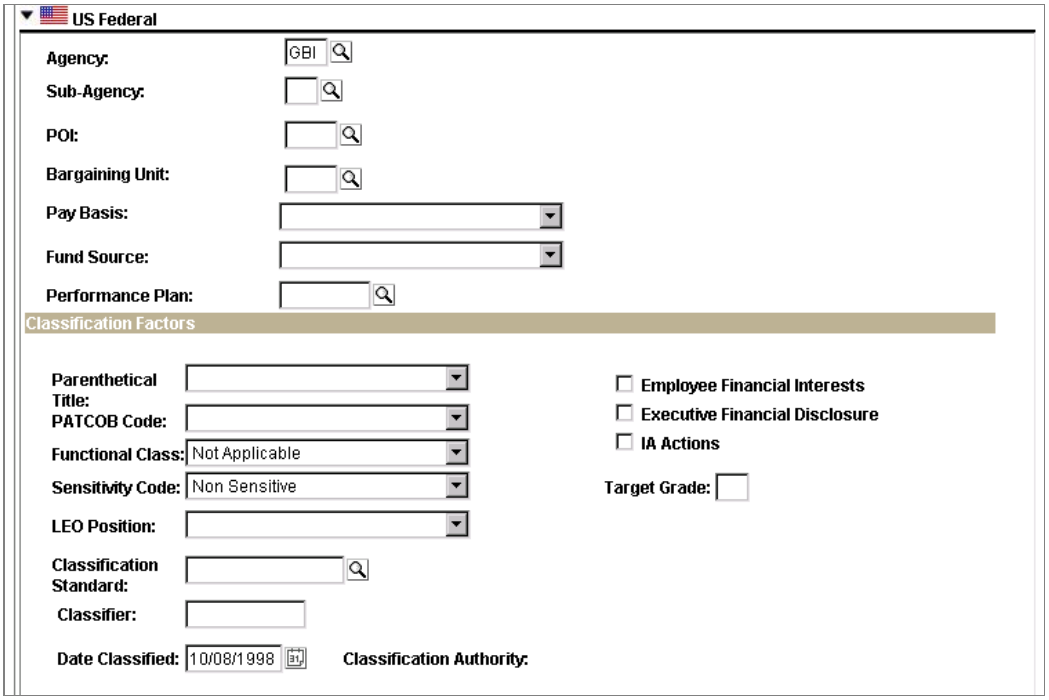
Job Code Table - Job Code Profile page 1/5



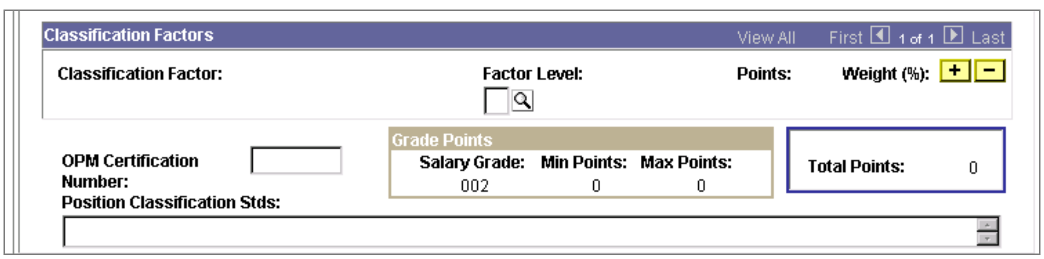
Job Code Table - Job Code Profile page 2/5



Job Code Table - Job Code Profile page 3/5



Job Code Table - Job Code Profile page 4/5



Job Code Table - Job Code Profile page 5/5

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Effective Date, Status.**

Effective Date	The **Effective Date** defaults to the system date, usually today's date, which you change unless you want the Job Code to go into effect today. We recommend that you set the **Effective Date** to a date that accounts for complete employee and job history, such as January 1, 1980.
Job Code	The **Job Code** is a unique code that you associate with a specific job in your organization.
Occupation Series	This field is for US Federal users only. Select the job code's **Occupational Series** from the list of available options.

Official Posn Title Code

This field is for US Federal users only.

Select the job code's official position title code from the list of available options.

Organization Posn Title Cd

This field is for US Federal users only.

Select the job code's organization position title code from the list of available options.

Job Function Code

Select the **Job Function Code** that best categorizes the job by function, such as administrative, legal, or management. Job Function codes are stored in the Job Function Code Table. This information is used for German and Canadian reporting purposes.

If your company uses the PeopleSoft Payroll for North America, the Survey of Employment for Educational Institutions report (PAY110CN) uses the **Job Function Codes** of ***TCH*** (teacher), ***NTC*** (non-teaching), and ***SUP*** (supply/substitute teachers).

For more information, see the PeopleSoft Payroll for North America documentation.

Job Family

Enter 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 “Analyst.” Job Families are also used in the Manage Competencies Business Process.

For more information on Job Families and managing competencies, see Managing Competencies

---

Manager Level

The **Manager Level** defaults to ***Non-Mgr,*** which you can override by selecting a different level from the values in the Translate table. Examples include ***Vice President, Director, Mid-level Manager,*** or ***Supervisor.***

Standard Hours	In **Standard Hours,** enter the default number of hours in a normal work week for this job. The **Standard Hours** indicated on this page become the default standard hours for all employees associated with this Job Code. If necessary, you can modify the standard hours for an employee in their Job Data pages.
	If you drive the system by position, the hours you enter here will become the default hours for positions associated with this Job Code (if the standard hours number hasn't already defaulted from the Salary Administration Plan of the Position's location). You modify the default hours for a position in the Position Data pages.
	For more information on positions, see Managing Positions, "Setting Up Positions"
	The value you assign for **Standard Hours** here 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 a **Standard Work Period.** The **Standard Work Period** is the time period in which employees must complete the Standard Hours. The system stores valid values on the Frequency table.
	The system uses the annualization factor of the **Standard Work Period** in combination with the Standard Hours to calculate FTE (full-time equivalency).
	For more information about Standard **Work Period** defaulting, see Defaulting of Standard Hours and Standard Work Period.
Workers' Comp (Compensation) Code	Enter a **Workers' Comp Code** to specify the workers' compensation plan to which this Job Code belongs.
Comp Freq (Compensation Frequency)	The **Compensation Frequency** defaults to the frequency you specified in the Installation Table. You can override the default if necessary by selecting from valid values in the Frequency Table.
Regular/Temporary	Indicate if the job is regular or temporary.

Medical Checkup Required If this Job Code requires a one-time medical checkup when the worker is hired into the job, select the **Medical Checkup Required** check box.

Note. If you're tracking a German workforce, you also need to indicate if the job requires ongoing medical surveillance in the Job Code Profile section for local German functionality, especially if the worker comes in contact with hazardous conditions or materials in the job.

Belgium

Union Code If you are defining a Job Code associated with a union, select a **Union Code.** You define unions in the Union Table.

Defining unions for Job Codes affects Manage Labor Relations functionality in PeopleSoft Human Resources.

Canada

National Occupational Classif (classification) Select a National Occupational Classif from the valid values you first defined in the Canadian National Occupation Codes Table.

Pay Equity Job Class Select a Pay Equity Job Class. You enter data for pay equity job classes into the system in the Canadian Pay Equity Table.

Seasonal Select the check box if the job is Seasonal.

BPS Activity (Business Payrolls Survey Activity) Select a BPS Activity code from the list of available options.

Union Code If you're defining a Job Code in Canada associated with a union, select a Union Code. You define unions in the Union Table.

Defining unions for Job Codes affects Manage Labor Relations functionality in PeopleSoft Human Resources.

Report Flag Select the appropriate **Report Flag** if the job code is to be reported in one of the Canada Academic Teaching Surveys. Select either ***Full-Time Survey, Part-Time Survey, Both Surveys,*** or ***Not Applicable.***

This field is intended for Canadian higher education degree-granting institutions only.

Duties

Indicate if the job code is ***Teaching only, Teaching & other resp.,*** or ***Research.*** This field is required if you selected the **Report Flag** field, flagging the job for reporting in the Canada Academic Teaching Surveys.

This field is intended for Canadian higher education degree-granting institutions only.

Province

Enter the **Province** that you report to when you perform WCB 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 within that industry within that province.

Classification

Select a WCB **Classification** for this **Job Code.** The classification indicates the industry that applies to this **Job Code.**

The Rate Groups and Classifications can be obtained from your local provincial WCB. The rates and rate codes can vary from province to province.

Academic Rank

Select the **Academic Rank** associated with this job code from the list of available options.

Service Calculation Group

Select the service calculation group to which this job code belongs from the list of available options.

Germany

Medical Surveillance Required

Select this check box 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.

United Kingdom

UK SOC Code (United Kingdom Standard Occupational Classification code)

Enter the appropriate **UK SOC Code** for this job. This is the UK Standard Occupational Classification code, and is required for Northern Ireland Community background reporting.

Italy

INAIL Code (Instituto Nazionale per l"Assicurazione contro gli Infurtuni sol Lavoro code)	Select the job code's **INAIL Code** from the list of available options. The **INAIL Code** classifies jobs according to the level of risk associated with the job and the related insurance required by the employer. **INAIL Codes** are set up on the Job Function Table page.

Netherlands

Union Code	If you're defining a Job Code in the Netherlands associated with a union, select a Union Code. You define unions in the Union Table. Defining unions for Job Codes affects Manage Labor Relations functionality in PeopleSoft Human Resources.

USA

Union Code	If you're defining a Job Code in the USA associated with a union, select a Union Code. You define unions in the Union Table. Defining unions for Job Codes affects Manage Labor Relations functionality in PeopleSoft Human Resources.
EEO-1 Job Category, EEO-4 Job Category, EEO-5 Job Category, and **EEO-6 Job Category**	Select a **EEO-1 Job Category, EEO-4 Job Category, EEO-5 Job Category,** and **EEO-6 Job Category** from the values in the Translate table. The EEO-1 code is also the Federal Occupation Category (FOC).
Standard Occupational Classif	If your company has operations in Alaska, you can enter a **Std. Occ. Classif.** (standard occupational classification) code for use in unemployment insurance reporting. You enter U.S. SOC codes in the U.S. Standard Occupational Classification Table. You don't need to enter a value in this field if your company doesn't have operations in Alaska.
EEO Job Group	If you want to further classify the job categories, enter the **EEO Job Group** to which this job belongs.
FLSA Status	The code you enter in **FLSA Status** indicates whether this job is exempt or nonexempt, according to the Fair Labor Standards Act (FLSA). This value becomes the default for the FLSA Status on all employee job records associated with this Job Code. FLSA Status values are included in the Translate table. Examples include administrative, executive, nonexempt, and professional.
Tipped	Select the appropriate **Tipped** description for this job, ***Tipped*** or ***Not Tipped.***

Academic Rank	Select the **Academic Rank** associated with this job code from the list of available options.
Service Calculation Group	Select the service calculation group to which this job code belongs from the list of available options.

For more information on U.S. regulatory reporting, see Meeting Regulatory Requirements. For more information on the U.S. Standard Occupational Classification Table, see your PeopleSoft Payroll for North America documentation.

US Federal

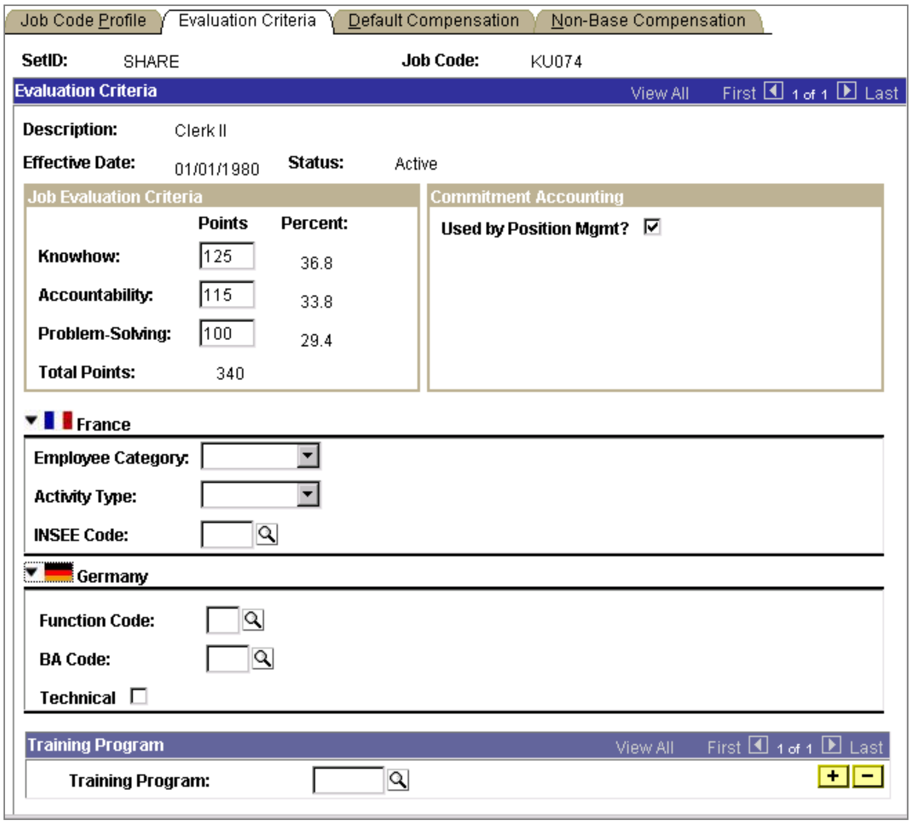
Agency	Select the **Agency** this job code is associated with.
Sub-Agency	Select the **Sub-Agency** this job code is associated with.
POI (personnel office identifier)	Enter the **POI** for this job code.
Bargaining Unit	If you're defining a job code associated with a union, select a **Bargaining Unit**.
Pay Basis	Enter the **Pay Basis** for which you quote salaries for this job code, for example, ***Per Annum*** or ***Per Hour***.
Fund Source	Select the **Fund Source** for this job code.
Performance Plan	Select the **Performance Plan** for this job code.
Parenthetical Title	Select a **Parenthetical Title** for this job code.
PATCOB Code	Select a **PATCOB Code** for this job code.
Functional Class	Select a **Functional Class** for this job code.
Sensitivity Code	Select a **Sensitivity Code** for this job code.
LEO Position	Select a **LEO Position** for this job code.
Classification Standard	Select a **Classification Standard** for this job code.
Classifier	Enter a **Classifier** for this job code.
Date Classified	Enter the date this job code was classified.
Classification Authority	The system will display the **Classification Authority** associated with the **Classification Standard** you entered above.

Employee Financial Interests	Select this check box if this job code participates in **Employee Financial Interests.**
Executive Financial Disclosure	Select this check box if this job code participates in **Executive Financial Disclosure.**
IA Actions	Select this check box if this job code participates in **IA Actions.**
Target Grade	Enter the **Target Grade**, if applicable.
Classification Factor	The system will display the **Classification Factors** associated with the **Classification Standard** you entered above.
Factor Level	Enter a classification **Factor Level** for each **Classification Factor** that is associated with this **Classification Standard.**
Points	The system will display the **Points** associated with the **Classification Standard** you entered above.
Weight (%)	The system will display the **Weight** percentage of the **Points** associated with the **Classification Standard** you entered above.
OPM Certification Number	Enter the **OPM Certification Number** associated with this job code.
Grade Points	The system will display the **Grade Points** associated with the **Classification Standard** you entered above.
Total Points	The system will display the **Total Points** associated with the **Classification Standard** you entered above.
Position Classification Stds.	Enter the position classification standards used.

Job Code Table - Evaluation Criteria Page

Usage	Use Evaluation Criteria page to assign points to certain job evaluation criteria. You or your compensation administration personnel can use this information to rank all Job Codes in your company and to assess salary grades, steps, and exempt/non-exempt categories for personnel.
Object Name	JOBCODE_TBL2_GBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Evaluation Criteria** • **Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Evaluation Criteria** • **Develop Workforce, Plan Careers, Setup, Job Code Table,**

	Evaluation Criteria
Prerequisites	None
Access Requirements	SetID or Job Code



Job Code Table - Evaluation Criteria page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Description, Effective Date, Status.**

Job Code System displays the **Job Code** that you entered.

Knowhow Enter points that represent the employee's knowledge required to perform the job.

Accountability Enter points that represents the employee's ability to do the assigned job.

Problem-Solving Enter points that represent the employee'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 **Knowhow, 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 total points, **Accountability** receives 33.7 percent, and **Problem-Solving** receives 33.1 percent, then all three factors are almost equally important.

On the other hand, if **Knowhow** receives 54.4 percent, **Accountability** receives 9.2 percent, and **Problem-Solving** receives 36.4 percent, then **Knowhow** is of greater importance than either **Accountability** or **Problem-Solving,** and **Accountability** is of little significance.

Used by Position Mgmt (Management)?

The **Used by Position Mgmt?** check box defaults to ***on*** if you specify Full or Partial Position Management on the Installation Table. If the Job Code is used by a Position, select the **Used by Position Mgmt?** (Used by Position Management) check box. When defining positions, you can only choose Job Codes that have this check box enabled.

When the **Used by Position Mgmt?** check box is selected, it tells the system that you're budgeting for the Job Code at the position level. However, it does not restrict your ability to attach positions to a Job Code or attach employees to a Job Code. Even if **Used by Position Mgmt?** is cleared, you can still set up a position with the Job Code. In the reverse situation, you can still enter the Job Code on the employee's job data record if **Used by Position Mgmt?** is selected.

For more information on positions and position management, see Driving Your System by Employee or Position earlier in this section and Managing Positions, "Setting Up Positions"

France

Employee Category

Select the **Employee Category**, either ***Executive***, ***Manager***, or ***Worker***.

Activity Type Select the activity linked to this job code.

INSEE Code Link this job code to an INSEE code. This information is used by the French Disability report.

Germany

Function Code Select this job code's **Function Code**.

BA Code Select this job code's **BA Code**, if applicable.

Technical Select this check box if this job code is **Technical.**

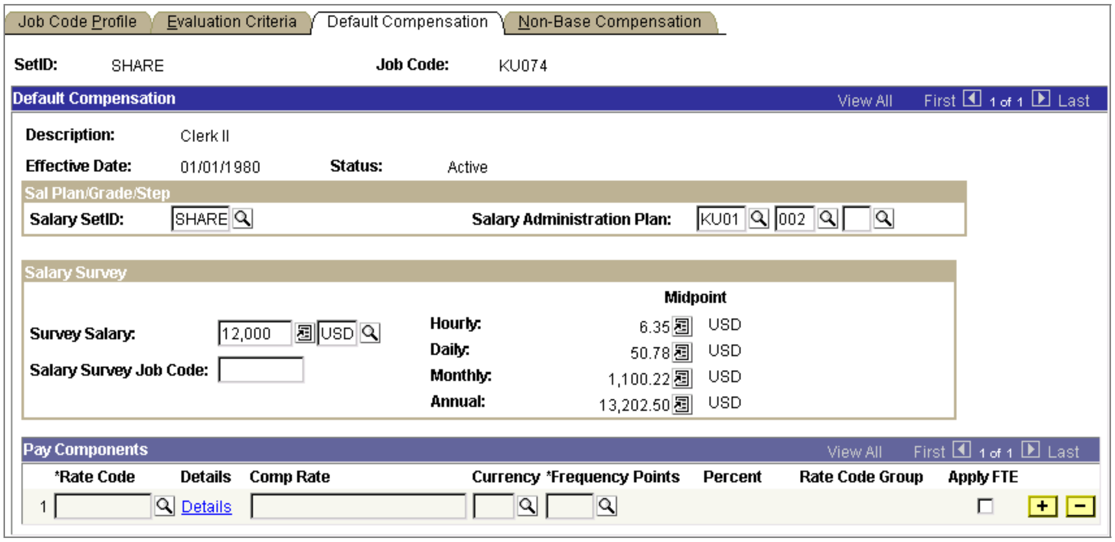
Training Program

Training Program You can choose to associate a **Training Program** with this Job Code, which you'll find particularly helpful in career planning. When you set up training and development programs for employees in this Job Code, you can use the default training program as the basis for an individual career training plan.

For more information on training programs, see Defining Training Courses and Programs. For more information on planning careers, see Planning Careers.

Job Code Table - Default Compensation Page

Usage	Use the Default Compensation page to 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.
Object Name	JOBCD_COMP_RATE
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Default Compensation** • **Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Default Compensation** • **Develop Workforce, Plan Careers, Setup, Job Code Table, Default Compensation**
Prerequisites	A salary planning information must be defined.
Access Requirements	SetID and Job Code



Job Code Table - Default Compensation page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Description, Effective Date, Status.**

Job Code	System displays **Job Code** ID that you entered.

Sal Plan/Grade/Step (Salary Plan/Grade/Step)

If your company has established compensation programs, select the codes that represent the default **Sal Plan/Grade/Step** for this job. You define these codes in the Salary Plan Table, Salary Grade Table, and Salary Step Table.

Salary SetID	Select a **Salary SetID** from this list of available values from the Job Code table.
Salary Administration Plan	Select a **Salary Administration Plan** (and additional salary planning information) from the list of available options from the Salary Grade and Salary Step tables. Select a Grade. The system populates the second **Salary Survey** group box on the page with Hourly, Monthly, and Annual Midpt (midpoint) pay rates associated with the Grade. Select a salary Step from the list of available options. Before you can enter a default salary grade and step in the Job Code Table, you must specify a salary administration plan. But the salary administration plan you enter in this table may or may not be the default used for employees. It depends on whether you've associated salary administration plans with locations in the Location Table.

If you associated salary administration plans with locations, when you select Job Codes for employees in the Job Data pages, the system enters salary administration plans from the Location Table. If you didn't associate plans with locations, the system defaults the salary administration plans you enter here.

No matter where the salary administration plan draws its default, when you select Job Codes for employees in the Job Data pages, the salary grade and step always default from the Job Code Table.

For more information on salary plans, grades, and steps, see Planning Salaries, "Setting Up Salary Plans, Grades, and Steps"

Salary Survey

Survey Salary

Enter the average salary for this **Job Code** if you are using a salary survey to compare your organization's salaries with industry averages. Select a **Currency.** Valid values prompt from the Currency table.

Note. If you enter salary survey information, the Job Grading by Evaluation Points report (CMP002) includes the information associated with each Job Code. You'll find Report samples and instructions for running reports are in ***PeopleSoft Human Resources Reports.***

Salary Survey Job Code

Enter the **Job Code** corresponding to the **Survey Salary** average salary.

Midpoint

The system displays the Salary Grades in **Midpoint.**

Hourly

The system displays the **Hourly** midpoint salary for this Salary Grade.

Daily

The system displays the **Daily** midpoint salary for this Salary Grade.

Monthly

The system displays the **Monthly** midpoint salary for this Salary Grade.

Annual

The system displays the **Annual** midpoint salary for this Salary Grade.

Pay Components

Rate Code	Select a **Rate Code** from the available options prompting from the Rate Code table.
Details	Click this link to review the Description, Comp Rate Type, and Rate Code Class associated with the Rate Code.
Comp Rate	Enter a **Comp Rate** (compensation rate) for the **Job Code.**
Currency	Select a **Currency.** Valid values prompt from the Currency table.
Frequency	The system enters the compensation **Frequency** of the Rate Code as the default frequency. Rate Code frequency is defined on the Comp Rate Code Table page.
Points	The system displays the **Points** associated with this rate code, if any.
Percent	If the Rate Code Type for this rate code is **Percent,** the system displays the percent to be applied to the job compensation rate or to a rate code group.
Rate Code Group	Select a **Rate Code Group.** Valid values prompt from the Rate Code Group table.
Apply FTE	Select **Apply FTE** to indicate the compensation rate for this Rate Code will be multiplied by the FTE (full time equivalency) in the calculation of the Job Compensation Rate.

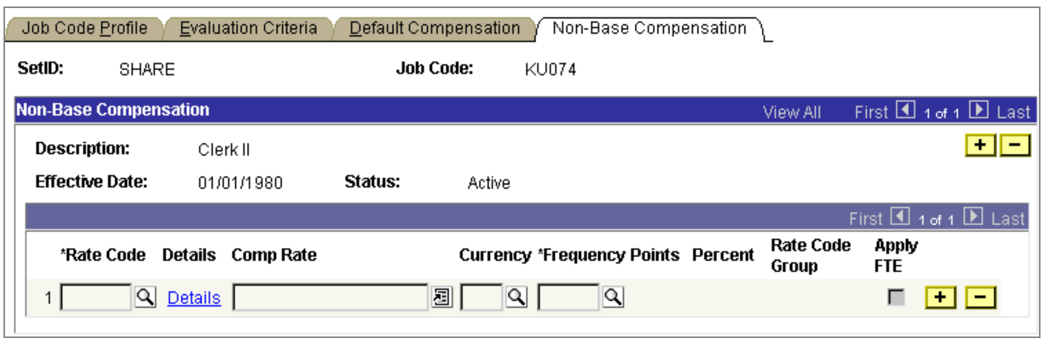
For more information about FTE, see Defining FTE.

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 available columns.

Job Code Table - Non-Base Compensation Page

Usage	Use the Non-Base Compensation page to associate non-base rate codes with a job code. The system doesn't use non-base pay rate codes as default values in any HRMS pages. They are used for payroll processing purposes.
Object Name	JOBCD_NON_BASE

Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Non-Base Compensation** • **Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Non-Base Compensation** • **Develop Workforce, Plan Careers, Setup, Job Code Table, Non-Base Compensation**
Prerequisites	None.
Access Requirements	SetID and Job Code.



Job Code Table - Non-Base Compensation page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **SetID, Description, Effective Date, Status.**

Rate Code Select a **Rate Code** from the available options from the Comp Rate Code Table page.

Details Click this link to review the Description, Comp Rate Type, and Rate Code Class associated with the Rate Code.

Comp (Compensation) Rate Enter a **Comp Rate** for the **Job Code.**

Currency Select a **Currency.** Valid values prompt from the Currency table.

Frequency The system enters the compensation **Frequency** of the Rate Code as the default frequency. Rate Code frequency is defined on the Comp Rate Code Table page.

Apply FTE Select **Apply FTE** to indicate that the compensation rate for this Rate Code is multiplied by the FTE (full time equivalency) in the calculation of the Job Compensation Rate.

For more information about FTE, see Defining FTE.

Points The system displays the **Points** associated with this rate code, if applicable.

Percent If the Rate Code Type for this rate code is **Percent,** the system displays the percent to be applied to the job compensation rate or to a rate code group.

Rate Code Group Select a **Rate Code Group.** Valid values prompt from the Rate Code Group table.

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 available columns.

Building Organization Charts

PeopleSoft Human Resources includes an Organization Charting interface that enables you to produce detailed organizational charts through seamless integration between your PeopleSoft Human Resources data and Visio's organizational charting wizard. Building organizational charts was never easier—all you have to do is choose to map your organization based on Positions or Departments using one of your PeopleSoft Human Resources Security or Department Trees, run the Organization Chart SQR from the Process Scheduler, and Visio does the rest. Once you select formatting options using Visio's Organization Charting Wizard, creating detailed charts of either one department or your entire organization is as simple as pressing a button.

Before You Begin

Except where we indicate otherwise, you'll find the panels described in this section in the Go, Administer Workforce, Administer Workforce (GBL), Process menu, and the Go, PeopleTools, Tree Manager window.

You can run the Organization Chart Interface process from the Administer Workforce global or local country menus, as well as from the Department Data panel within the PeopleTools Tree Manager.

Make sure organizational and employee data exist in PeopleSoft Human Resources before you start working with the Organization Charting Interface panels.

For more information on organizational and employee data, refer to Hiring Your Workforce.

Important! While this section walks you through using the Visio Organization Charting Wizard to create your organizational charts, for full information on Visio's features, please refer to your Visio documentation.

Setting Up Your Organization Charting Interface

Setting up your Organization Charting Interface is a three step process:

1. Step 1. Check your Visio settings.

In order to use the Organization Charting interface in PeopleSoft Human Resources, you'll need to check to make sure that Visio is installed on your system.

Visio is not delivered with your PeopleSoft Human Resources system, you must purchase and install Visio separately.

For more information on installing Visio, please refer to your Visio documentation.

2. Step 2. Add the Global Environment Variable.

Add the following two global environment variables:

```
VISIO=<your Visio path>

TEMP=<temp dir>
```

For example, if you are using Windows 98, Visio is installed in a directory called Apps on your C:\ drive, and your temp directory is called Temp on your C:\ drive, you would add these two lines to your Autoexec.bat file:

```
VISIO=C:\APPS\VISIO

TEMP=C:\TEMP
```

If you are using Windows NT, open Control Panel, System and enter:

```
VISIO=<Visio path>

TEMP=<temp dir>
```

3. Step 3. Modify your PeopleSoft Human Resources Installation Table.

In order to use the Organization Charting Interface, you'll need to modify some settings on the Installation Table. To do so, open up the Installation Table – Third Party/System page.

Use the list of translate values to set the **Organization Chart** to ***Visio*** in the **Third Party Settings** group box.

Remember to save your changes.

For more information on the Installation Table settings, please refer to Setting Up Implementation Defaults.

Creating Organization Charts

To create organization charts based on your human resources data, you can take two approaches. You can use the Organization Chart panel in the Process menu in the Administer Workforce windows, or you can run the Organization Charting Interface from the Department panel in the Tree Manager. We'll discuss each option in turn.

Organization Chart Page

Usage	Use the Organization Chart page to create an organization chart based on Trees.
Object Name	ORGCHART_PNL
Navigation	**Administer Workforce, Administer Workforce (GBL), Process, Organization Chart** **Administer Workforce, Administer Workforce (USF), Process, Organization Chart**
Prerequisites	Set up organizational and employee data in PeopleSoft Human Resources. Set up your organization charting interface on the Installation Table – Third Party/
Access Requirements	Run Control ID

Organization Chart page

The panel displays the Operator ID and the Run Control ID you added before you entered the Organization Chart page.

To build your chart using one of your PeopleSoft Human Resources system trees, you'll provide the system with Department and/or Tree information. Select a Report Type from the list of options. These include:

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. You can include multiple departments in your chart using this Report Type option.

In the example panel above we have selected the **Report Type** of ***Tree.***

You can choose to build your organization chart from among ***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.

Before we discuss building your chart using trees let's first discuss building your chart using departments.

Building Your Chart Using Departments

If you choose the ***Department*** option as the **Report Type,** then the **SetID,** and **Department** fields appear, as shown on the following example panel.

Organization Chart page with Department Report Type selected

Insert a **SetID** by selecting from the list of prompt values, which are from the TableSet ID table.

Enter a **Department** that you want to include in your Organization Chart from the list of valid Department IDs in the SetID. You can build your organization chart using only one department at a time. You create these codes when you define Departments on the Department Table.

For more information on the Department Table and adding Department IDs, please refer to Maintaining Departments.

If you're building your chart using the Department Report Type instead of using Trees, then click the **Run** button, and the Process Scheduler runs the Organization Chart SQR. The SQRW icon will appear at the bottom of your screen if the process is running correctly. The icon disappears when the process is completed. Once the SQR finishes running, the system launches Visio.

For more information on running processes using the Process Scheduler, please refer to Process Scheduler.

Building Your Chart Using Trees

If you've selected a ***Tree*** **Report Type,** the **SetID, Tree Name, Tree Node,** and **#Levels** fields appear.

Select a **SetID** from the list of prompt values, which are from the TableSet ID table.

Select a **Tree Name** from the list of available PeopleSoft Human Resources trees.

Selecting Tree Nodes and Levels to Include in Your Chart

Indicate the **Tree Node** from the Tree that you chose to build the organization chart on. Indicate the # (Number) of **Levels** that you wish to include in your chart. The Tree Node and # of Levels tell the system where to start the organization chart at the Tree Node level, and the next x number of levels to include in the chart.

For example, if you selected to begin the chart at Tree Level 5, and leave the # of Levels at 3, the organization chart will include levels 5 though 7 of your Tree. Choosing Tree Node Level 5 tells the system where to begin your chart.

Setting the # of Levels at 3 instructs the Organization Chart Interface to include levels 5, 6, and 7 of your Tree in your organization chart.

The system displays the Tree Level that you selected. For example, if you selected Department 10100, the Office of the President, from the Department Security tree, the system indicates that you are using Tree Level 5.

For more information on tree structures and using trees in PeopleSoft Human Resources to build and understand Security Trees, please refer to Administering Security.

Click the **Run** button to have the Process Scheduler run the Organization Chart SQR. The SQRW icon will appear at the bottom of your screen if the process is running correctly. The icon disappears when the process is completed. Once the SQR finishes running, the system launches Visio, and Visio draws your organization chart for you automatically.

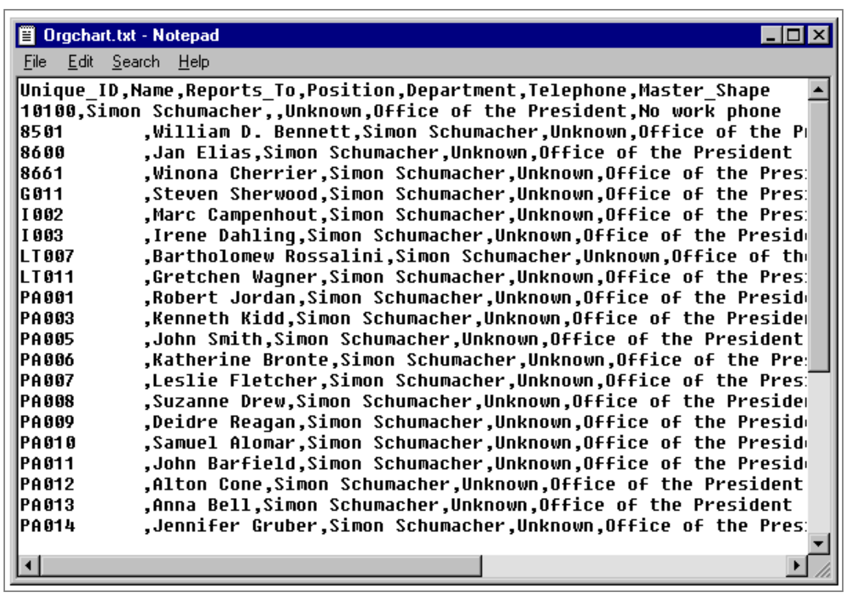
For more information on running processes using the Process Scheduler, please refer to Process Scheduler.

Reviewing the ORGCHART.TXT File

Once the Process Scheduler finishes running the Organization Chart SQR, it creates a flat file called ORGCHART.TXT. If you wish to review the results of your Organization Chart SQR process in the Orgchart.txt file, use a text file editor to open and look over the file. The Organization Chart Interface writes the file to your local Temp directory. The file contains the following human resources data:

- Unique ID
- Name
- Reports_To
- Position
- Department
- Telephone

Here is an example of what you'll see in the ORCHART.TXT file:

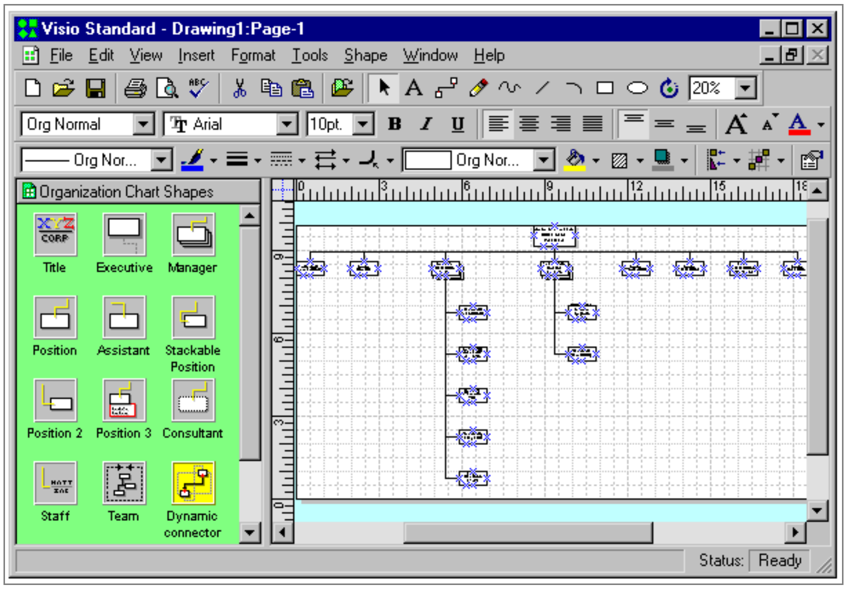



```
Unique_ID,Name,Reports_To,Position,Department,Telephone,Master_Shape
10100,Simon Schumacher,,Unknown,Office of the President,No work phone
8501       ,William D. Bennett,Simon Schumacher,Unknown,Office of the Pr
8600       ,Jan Elias,Simon Schumacher,Unknown,Office of the President
8661       ,Winona Cherrier,Simon Schumacher,Unknown,Office of the Pres
G011       ,Steven Sherwood,Simon Schumacher,Unknown,Office of the Pres
I002       ,Marc Campenhout,Simon Schumacher,Unknown,Office of the Pres
I003       ,Irene Dahling,Simon Schumacher,Unknown,Office of the Presid
LT007      ,Bartholomew Rossalini,Simon Schumacher,Unknown,Office of th
LT011      ,Gretchen Wagner,Simon Schumacher,Unknown,Office of the Pres
PA001      ,Robert Jordan,Simon Schumacher,Unknown,Office of the Presid
PA003      ,Kenneth Kidd,Simon Schumacher,Unknown,Office of the Preside
PA005      ,John Smith,Simon Schumacher,Unknown,Office of the President
PA006      ,Katherine Bronte,Simon Schumacher,Unknown,Office of the Pre
PA007      ,Leslie Fletcher,Simon Schumacher,Unknown,Office of the Pres
PA008      ,Suzanne Drew,Simon Schumacher,Unknown,Office of the Preside
PA009      ,Deidre Reagan,Simon Schumacher,Unknown,Office of the Presid
PA010      ,Samuel Alomar,Simon Schumacher,Unknown,Office of the Presid
PA011      ,John Barfield,Simon Schumacher,Unknown,Office of the Presid
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 Pres
```

Example of ORGCHART.TXT file

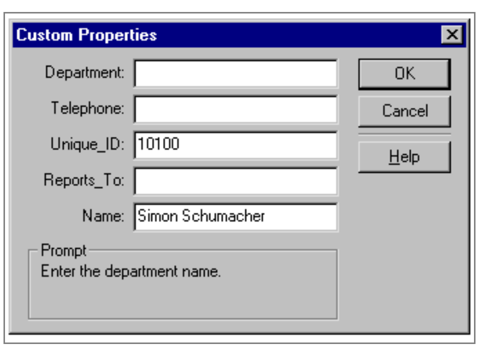
Using Visio's Organization Chart Wizard

When you use the Organization Chart Panel to create an Organization Chart, the Organization Chart Interface opens Visio and Visio draws your organization chart for you automatically. Here is an example of the Visio panel you'll see when your organization chart is completed.



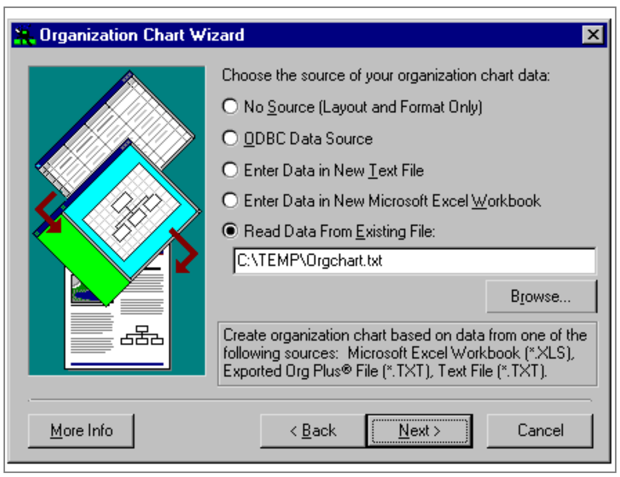
Example of a department organization chart in Visio

While viewing this panel in Visio you can right click on the top shape in the organization chart and a popup menu will open. Select Properties from this popup menu and the Custom Properties panel will appear. The custom properties you see here are configured while running the Visio Organization Chart Wizard. To review or modify your Organization Chart default settings run the Organization Chart Wizard in Visio. Here is an example of the Custom Properties panel.



Visio Custom Properties panel

When running your Organization Chart SQR for the first time, and the Visio Organization Chart Wizard is running for the first time, you'll receive a runtime error message. Despite the error message the ORGCHART.TXT file is placed in the <TEMP> file specified in your global environmental variables. When this occurs go to Microsoft Windows, open **Visio, Tools, Macro, Macros, Organization Chart Wizard, Run.** When the Organization Chart Wizard runs then enter the path to the ORGCHART.TXT file in the **Read Data From Existing File** field. For a visual explanation of how to do this see the following example panel. Once you have entered this information continue running the Organization Chart Wizard and Visio will create your first Organization chart. After this all of your subsequent runs using the PeopleSoft Organization Chart Interface will run smoothly.



Entering your data source in the Visio Organization Chart Wizard

For more information on editing and printing your Organization Chart in Visio, please refer to your Visio documentation.

Building an Organization Chart From Tree Manager

You can also use the Organization Chart Interface from the Tree Manager. The following section walks you through this process, and assumes that you have a working knowledge of the Tree Manager, and Department and Security Trees in PeopleSoft Human Resources. Your organization chart can include only a single department in your organization if you use this option.

For more information on using Trees in PeopleSoft Human Resources, please refer to Administering Security and Tree Manager.

Using Tree Manager to Build an Organization Chart

1. Log on to the Windows Client, open the PeopleTools Tree Manager, and select one of your PeopleSoft Human Resources trees.

2. When you double click on one of the nodes, such as 10100, Office of the President, the Department Table opens for that node.

3. To create an Organization Chart from the Department Table, click the Visio button. The Enter SQR Settings dialog will open.

4. Enter a Run Control ID. The Visio Organization Charting Wizard will open, create, and display your organization chart.

Setting Up Banks and Bank Branches

You must set up every bank that PeopleSoft HRMS deals with during the course of business. You'll set up the bank on the Bank Table page, and specify any bank branches on the Bank/Branch Table page.

You'll also specify which banks are the source banks for such processes as payroll, using the Source Bank Accounts page.

Enterprise Integration Point (EIP) Related to the Bank Table Page

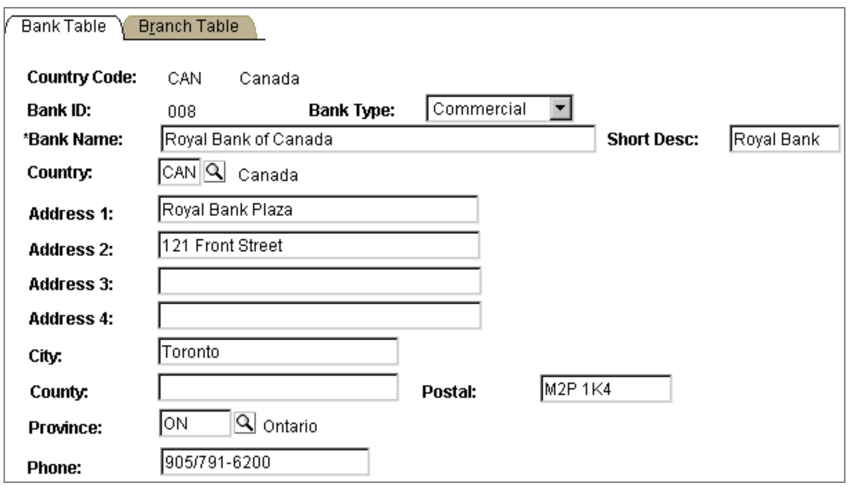
When you add, delete, or change bank information in the BANK_EC_TBL record (of the Bank Table page), the system automatically publishes the Bank Table EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the BANK_EC_TBL record on the Bank Table.

For more information regarding the subscribers and technical details of the Bank Table EIP, see Bank Table. For more information about Human Resources Enterprise Integration, see Overview of Enterprise Integration in PeopleSoft Human Resources. For more information about enterprise integration points, see PeopleSoft Enterprise Integration PeopleBook.

Bank/Branch Info - Bank Table Page

Usage	Use the Bank Table page to set up basic information for all financial institutions.
Object Name	BANK_EC
Navigation	• **Define Business Rules, Define General Data (NLD), Setup,**

	Bank/Branch Info, Bank Table • **Define Business Rules, Define Payroll Process, Setup 1, Bank/Branch Table, Bank Table** • **Define Business Rules, Define Payroll Process (USF), Setup 1, Bank/Branch Table, Bank Table** • **Define Business Rules, Define Global Payroll Rules, Setup 5, Banks, Bank Table** • **Define Business Rules, Manage Human Resources (GBL), Setup, Bank/Branch Table, Bank Table** • **Define Business Rules, Manage Human Resources (USF), Setup, Bank/Branch Table, Bank Table**
Prerequisites	None .
Access Requirements	Enter a Country Code and Bank ID.



Bank/Branch Info - Bank Table page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Short Description, Status.**

Country Code The country code you selected displays here.

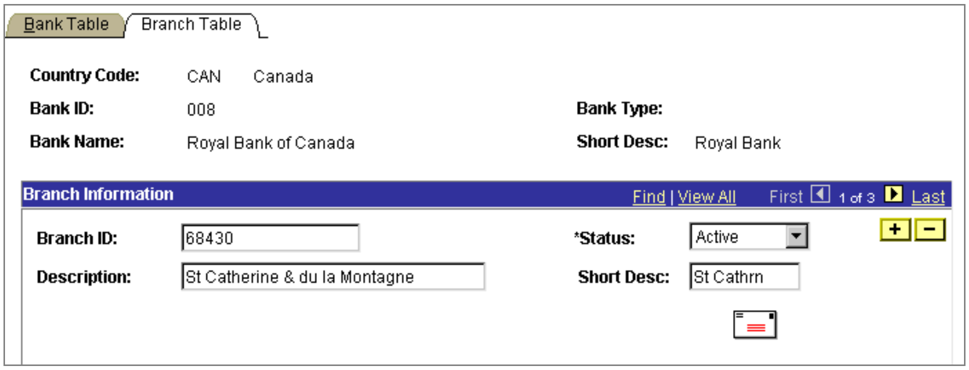
Bank ID The bank ID you selected displays here. There are different formats for each country. Some are numeric and others are alphanumeric.

For more information about valid Bank ID formats for a specific country, see the Banking section in the local country documentation.

Bank Type	Select the type of bank. Valid values are ***Commercial***, ***Community***, ***General***, ***Post Bank***, and ***Savings***.
Alt. Bank ID (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's used in international transactions.
Bank Name	Enter the name of the bank.
Country	Select the country where the bank is located.
Address (1,2,3,4)	Enter the bank address.
Postal	Enter the postal code for the bank.
State	Enter the state where the bank is located.
Phone	Enter the bank's phone number.

Bank/Branch Info - Branch Table Page

Usage	Use the Bank Branch Table page to define a bank's branches. A bank may have one or more branches. Not all countries require bank branch information.
Object Name	BANK_BRANCH_EC
Navigation	• **Define Business Rules, Define General Data (NLD), Setup, Bank/Branch Info, Branch Table** • **Define Business Rules, Define Payroll Process, Setup 1, Bank/Branch Table, Branch Table** • **Define Business Rules, Define Payroll Process (USF), Setup 1, Bank/Branch Table, Branch Table** • **Define Business Rules, Define Global Payroll Rules, Setup 5, Banks, Branch Table** • **Define Business Rules, Manage Human Resources (GBL), Setup, Bank/Branch Table, Branch Table** • **Define Business Rules, Manage Human Resources (USF), Setup, Bank/Branch Table, Branch Table**
Prerequisites	This is the second page in a two-page group. You must first complete the Bank Table page.
Access Requirements	Enter a Country Code and Bank ID.



Bank/Branch Info - Branch Table page

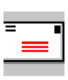
The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Status, Description, Short Description.**

Most of the fields in the Bank Branch Table are the same as those on the Bank Table Page. For more information about these fields, see the Bank/Branch Info - Bank Table Page.

Branch ID

Enter the branch ID for the bank. Bank ID formats vary by country.

For more information about branch ID format in a country, see the Banking section in the appropriate local country documentation.



Click the **Address Information** button to access the Bank Branch Address page.

Bank/Branch Table - Bank Branch Address Page

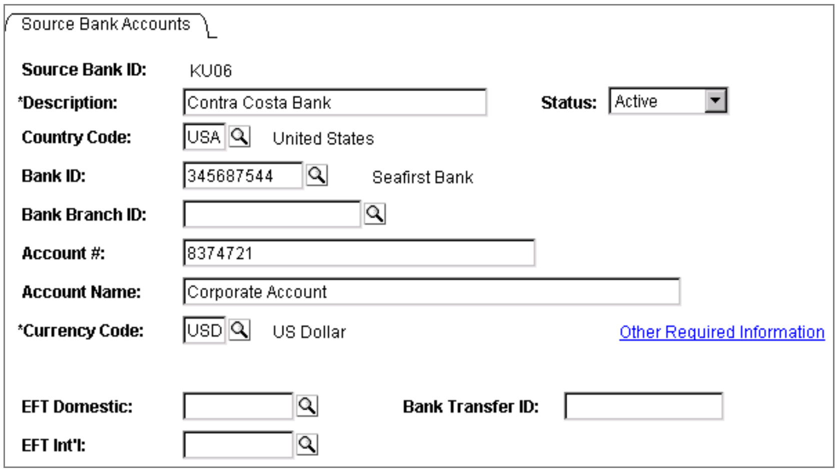
Usage	Use the Bank Branch Address page to enter the address for a bank branch.
Object Name	BANK_BRA_ADR_SP
Navigation	To access this page, click the Address Information button on the Bank Branch Table page**.**

Bank/Branch Table - Bank Branch Address page

The fields on the Bank Branch Address page are the same as those on the Bank Table page. For more information about these fields, see the Bank/Branch Info - Bank Table Page.

Source Bank Accounts Page

Usage	Use the Source Bank Accounts page to assign a source bank ID and define information about the banks that pay out money. Source banks are the money sources that payroll disbursements are drawn from.
Object Name	SRC_BANK
Navigation	• **Define Business Rules, Define Payroll Process, Setup 1, Source Bank Table, Source Bank Accounts** • **Define Business Rules, Define Payroll Process (USF), Setup 1, Source Bank Table, Source Bank Accounts** • **Define Business Rules, Define Global Payroll Rules, Setup 5, Source Bank Accounts, Source Bank Accounts** • **Define Business Rules, Manage Human Resources (GBL), Setup, Source Bank, Source Bank Accounts** • **Define Business Rules, Manage Human Resources (USF), Setup, Source Bank, Source Bank Accounts**
Prerequisites	You must first define individual bank information on the Bank Table page.
Access Requirements	Enter a Source Bank ID.



Source Bank Accounts page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions **Description, Status**.

Source Bank ID — The source bank ID you selected in the entry dialog box displays here.

Country Code — Select the country code.

Bank ID — Select the bank ID.

Bank Branch ID — Select the bank branch ID, if applicable.

Account # (account number) — Enter the bank account number. Each country has its own account number format.

For more information about the account number formats for a country, see the local country documentation.

Account Name — Enter the bank account name.

Currency Code — Specify the currency being used.

Other Required Information — Click this link to access the Additional Data page. Depending on the country extension you select, you may or may not have this additional page. It is only used to record specific information for companies operating in the US and Canada.

EFT Domestic

Specify which EFT format a Source Bank Account accepts. Enter the EFT name for domestic transactions. If the payee or recipient account is domestic, the default EFT name will be taken from the **EFT Domestic** field of the Source Bank Account you selected. Domestic accounts are accounts whose country code is the same as the country code selected during installation.

Bank Transfer ID

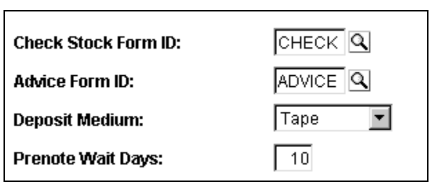
Enter the bank transfer ID.

EFT Int'l

Enter the EFT name for international transactions. If the payee or recipient account is foreign, the default EFT name will be taken from the **EFT Int'l** field of the Source Bank Account you selected. Foreign accounts are accounts whose country code is different from the country code selected during installation.

Source Bank - US Bank Additional Data Page

Usage	Use the US Bank Additional Data page to specify data for banks in the US and Canada.
Object Name	SRC_BANK_PY_SP
Navigation	Click the Other Required Information link on the Source Bank Accounts page for US and Canadian banks**.**



Source Bank - US Bank Additional Data page

Check Stock Form ID

If your company prints their own checks, identify the print layout and form for this source bank account.

Advice Form ID

If your company prints their own advices, identify the print layout and form for this source bank account.

Deposit Medium

Specify how transactions are transferred to the bank for processing. Selections are:

Tape

EFT

Diskette

Report

Prenote Wait Days	Enter in the number of prenote wait days. When your company wants to make transfers to a new account, (for example, an existing employee changes the account for automatic deposits) the banks require a initial run with a dummy record to establish that this is a valid (existing) account. There is a specified time period after this dummy run until actual funds can be transferred to this account. That period is referred to as prenote wait days.
Routing Format	For Canada only. Enter in 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 zero, and can vary whether Bank ID or Branch ID comes first.

Maintaining Pay Groups

When you implement PeopleSoft HRMS, particularly PeopleSoft Payroll for North America or PeopleSoft Global Payroll, one of your major tasks is to set up pay groups. A pay group logically groups a set of employees within a company. For example, you might create different pay groups for employees with different sets of benefits or earnings.

While this information may seem specific to payroll processing–with either PeopleSoft Payroll for North America or your own system–you also need it for PeopleSoft Human Resources to set up job records and benefit programs. Many of the fields on the Administer Workforce pages default to the values you specify in this table. You need to set up at least one pay group for each company you've established in the Company Table (Agency Table for U.S. Federal users).

Where you set up Pay Group depends on which payroll application you use. Use the Pay Group table discussed in this section if you use PeopleSoft Payroll for North America or aren't using a PeopleSoft payroll application at all. If you use PeopleSoft Global Payroll, you use the Pay Group component in that application.

If you use PeopleSoft Pension Administration, you need to set up pay groups for your pension payee companies, as well. However, PeopleSoft Pension Administration doesn't use pay groups for paying pension benefits.

If you use both PeopleSoft Global Payroll and PeopleSoft Payroll for North America, you must set up both types of pay groups. Otherwise you only need define pay groups for the application you use.

For more information about defining pay groups if you're using PeopleSoft Global Payroll, see PeopleSoft 8 Global Payroll PeopleBook.

Using the Pay Group Table Component

The Pay Group Table consists of nine pages. You'll find that the component in the Manage Human Resources menu has only the first three pages: the full nine pages are in the Define Payroll Process menu. For PeopleSoft Human Resources, you need to enter information only in the first three pages of the Pay Group Table, because the information in them is used across all applications of PeopleSoft HRMS. You use the last six pages in the page group solely for PeopleSoft Payroll for North America purposes, so they aren't included in the Manage Human Resources menu.

USF The Manage Human Resources (USF) - Pay Group Table for U.S. contains only one page that must be completed for PeopleSoft HRMS. The entire, nine page component can be found under the Define Payroll Process menu.

Remember, pay groups you define here are for use only with the PeopleSoft Payroll for North America application.

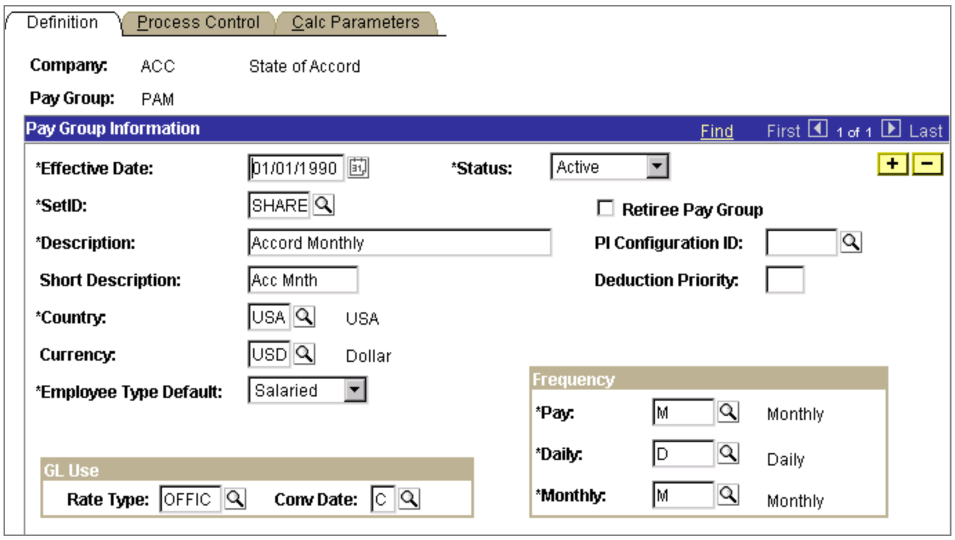
For more information on the Pay Group Table as it used for payroll purposes, see your PeopleSoft Payroll for North America documentation or the PeopleSoft Payroll Interface documentation.

Pay Group Table –Definition Page

Usage	Use the Definition page to set up and describe your pay groups.
Object Name	PAYGROUP_TABLE1
Navigation	• **Define Business Rules, Define General Data (NLD), Setup, Pay Group Table, Definition** • **Define Business Rules, Define Payroll Interface, Setup, Pay Group Table, Pay Group Table 1** • **Define Business Rules, Define Payroll Process, Setup 2, Pay Group Table, Pay Group Table 1** • **Define Business Rules, Define Payroll Process (USF), Setup 2, Pay Group Table, Pay Group Table 1** • **Define Business Rules, Manage Human Resources (GBL), Setup, Pay Group Table, Definition** • **Define Business Rules, Manage Human Resources (USF), Setup, Pay Group Table, Definition**
Prerequisites	None

Access Requirements	Enter a Company and a Pay Group. The Company defaults to the company you specified in Installation Table - Products page, which you can override, if necessary.

This page is not on the Manage Human Resources (USF) - Pay Group Table.



Pay Group Table - Definition page

Company The **Company** you specified in the entry dialog box displays here.

Pay Group The **Pay Group** you specified in the entry dialog box displays here.

Note. Pay groups default to employee job records from the company level.

Effective Date The **Effective Date** defaults to the system date, usually today's date, which you change unless you want this pay group to be in effect as of today.

Status Select the **Status** of the pay group. Valid values are ***Active*** and ***Inactive***.

SetID

Select a **Set ID** for the pay group. When you add a new pay group, the system executes PeopleCode that automatically creates a TableSet Record Group Control entry. The **Set** ID for shift codes, which is created for this entry, defaults to the Pay Group ID.

If the **Set ID** for shift codes for this pay group should be pointing to a different **SetID**–for example, a company level **SetID**–then you must update the default **SetID**. To do this, select **Go, PeopleTools, Utilities, TableSet Control, Update/Display, TableSet Record Group Control.** Enter the set control value equal to the pay group you just added. When the page displays, enter the appropriate **SetID** for the Record Group ID equal to SHIFT.

Retiree Pay Group

Indicate if the pay group is a **Retiree Pay Group.**

Description

Enter a **Description** for the pay group.

PI Configuration ID

If appropriate, select a payroll interface Configuration ID. The **PI Configuration ID** is used by the PeopleSoft Payroll Interface application.

Short Description

Enter a **Short Description** for the pay group.

Deduction Priority

Enter a **Deduction Priority** number for your pay group.

For more information on deduction priority, see PeopleSoft 8 Payroll for North America, “Defining Deductions”

Country

Country defaults to the country you specified in the Installation Table. This value indicates which tax module is used to calculate pay for this group. You can change this code, if necessary.

Currency

Enter the **Currency** used by this pay group.

Employee Type Default

Select the most common employee type within the pay group. The system uses the **Employee Type Default** you specify on this page as the default for the pay group’s employee job records. The default you enter on this page is edited against the Benefit/Deduction Program Table in the Administer Base Benefits menu. You need to set up that table first or leave this field blank for now.

Salaried. Select this value 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 this value 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 would enter the hours worked on the pay sheets.

Exep Hrly. Select this value for employees who work a set number of hours each pay period. Here you would only need to enter exceptions to their schedule on the pay sheets.

Not Appl. Select this value if the employee type default isn't applicable.

For more information on employee type default, see Entering Company Information.

Frequency

Pay

Select the frequency of pay for this pay group. Valid values are ***Annual***, ***Biweekly***, ***Daily***, ***Monthly***, ***Quarterly***, ***Semimonthly***, and ***Weekly***.

Daily

This field is used by PeopleSoft Human Resources to calculate the daily rate that appears on the Compensation page of Job Data.

Monthly

For U.S. or Canadian employees, **Months** (pay months per year) should always default to ***12.*** For global employees, the system uses this value to calculate various pay rates. So if you hire employees where **Months** isn't ***12,*** you must use the Recruit Workforce (GBL) or Administer Workforce (GBL) menus; otherwise, pay rates for international employees may be calculated incorrectly.

GL Use

Rate Type

This field is used by the PeopleSoft General Ledger application. Valid values are ***Commercial Rate***, ***Financial Rate***, ***Floating Rate***, ***Freemarket Rate***, ***Global Payroll***, ***Official Rate***, and ***Spot Market Rate***.

Conv Date

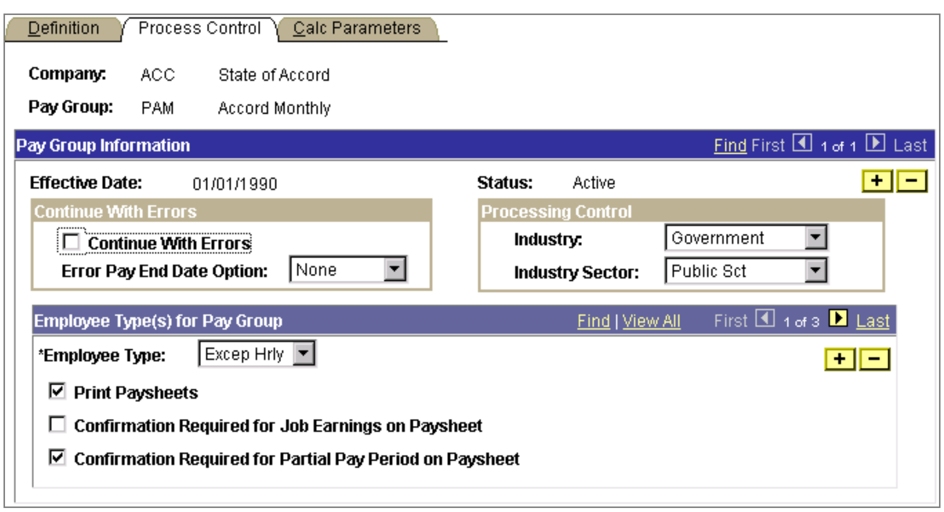
This field is used by the PeopleSoft General Ledger application. Valid values are ***Check Date***, ***Pay End Date***, and ***Today's Date***.

Pay Group Table - Process Control Page

Usage	Use the Process Control page to establish all the employee type options

	that are valid for employees in a particular pay group. You should do this prior to assigning employee types on employee records. For example, you may want to group only salaried employees in your monthly pay group and hourly and exception hourly employees into a biweekly pay group.
Object Name	PAYGROUP_TABLE2
Navigation	• **Define Business Rules, Define General Data (NLD), Setup, Pay Group Table, Process Control** • **Define Business Rules, Define Payroll Interface, Setup, Pay Group Table, Pay Group Table 2** • **Define Business Rules, Define Payroll Process, Setup 2, Pay Group Table, Pay Group Table 2** • **Define Business Rules, Define Payroll Process (USF), Setup 2, Pay Group Table, Pay Group Table 2** • **Define Business Rules, Manage Human Resources (GBL), Setup, Pay Group Table, Process Control** • **Define Business Rules, Manage Human Resources (USF), Setup, Pay Group Table, Process Control**
Prerequisites	You must complete the Definition page prior to completing this page.
Access Requirements	Enter and Company and a Pay Group. The Company defaults to the company you specified in Installation Table - Products page, which you can override, if necessary.

This page isn't on the Manage Human Resources (USF) - Pay Group Table.



Page Group Table - Process Control page

Company This defaults from the Definition page.

Pay Group This defaults from the Definition page.

Effective Date This defaults from the Definition page.

Status This defaults from the Definition page.

Continue With Errors

Continue With Errors **Continue With Errors** allows the Pay Calculation process to continue preparing checks even though it has confirmed errors. This allows the payroll process to complete and items in error to be corrected in a separate off-cycle run.

Error Pay End Date Option This value is used by the Pay Calendar build process to set up the Pay Calendar.

Warning! If you enter your own Error Pay 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 the appropriate **Industry.**

Industry Sector Select the appropriate **Industry Sector.** Valid values are ***None***, ***Core***, ***Public Sct***, and ***US Federal***.

Employee Type(s) for Paygroup

Employee Type Select all of 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 appropriate payroll processing parameters. Otherwise, for employees being paid with PeopleSoft Payroll for North America, you can leave **Print Paysheets** as the default.

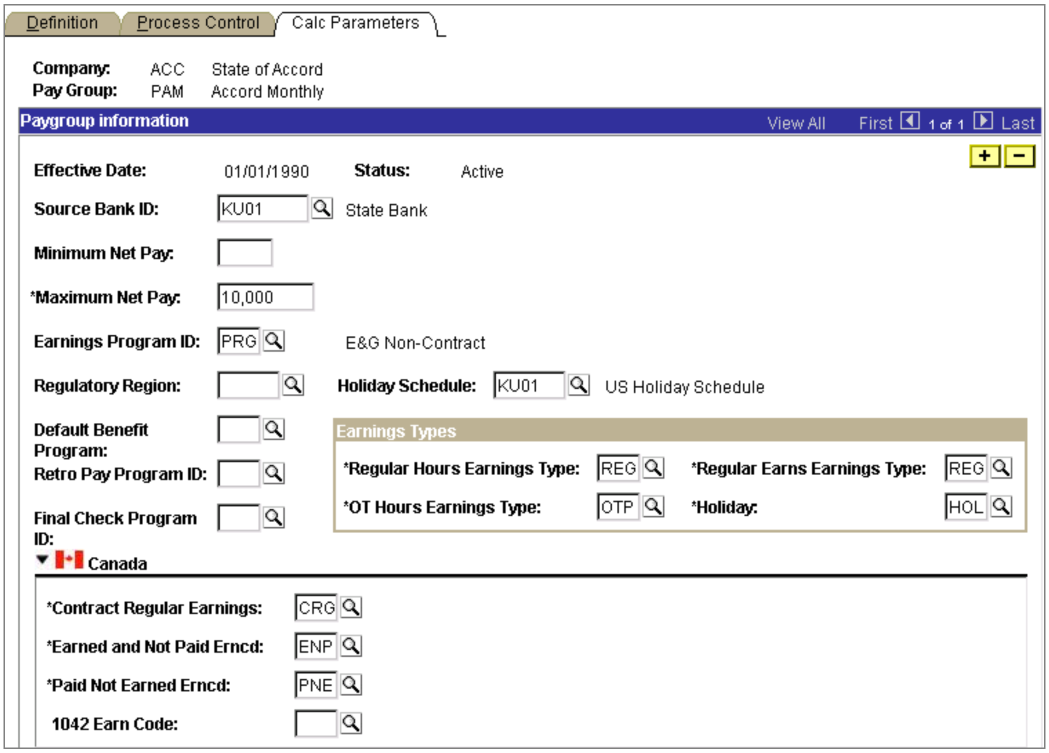
Print Paysheets If you are using PeopleSoft Payroll for North America, select this check box if the employees in this employee type should always be included when printing paysheets. Employee types that don't have this option selected will still appear on the paysheet pages.

Confirmation Required for Job Earnings on Paysheet	Refer to your PeopleSoft Payroll for North America documentation.
Confirmation Required for Partial Pay Period on Paysheet	Refer to your PeopleSoft Payroll for North America documentation.

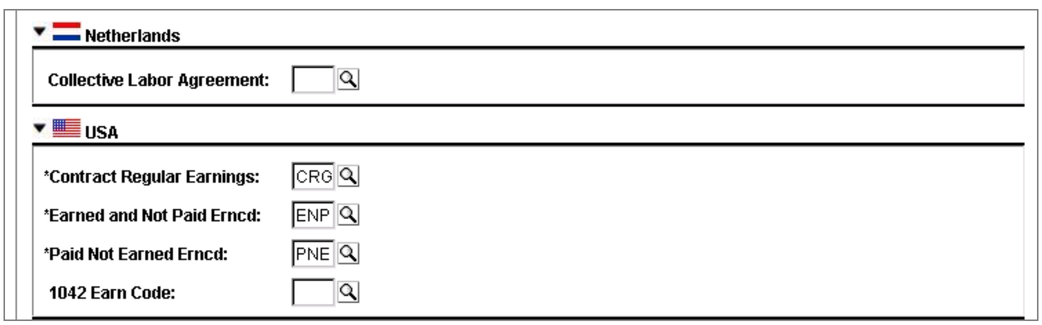
For more information on these processing parameters in North America, see Working with Paysheets.

Pay Group Table - Calc Parameters Page

Usage	Use the Calc Parameters page to define further payroll processing parameters for pay groups.
Object Name	PAYGROUP_TBL3_GBL
Navigation	• **Define Business Rules, Define General Data (NLD), Setup, Pay Group Table, Calc Parameters** • **Define Business Rules, Manage Human Resources (GBL), Setup, Pay Group Table, Calc Parameters** • **Define Business Rules, Manage Human Resources (USF), Setup, Pay Group Table, Calc Parameters**
Prerequisites	You must complete the Definition page prior to completing this page.
Access Requirements	Enter a Company and a Pay Group. The Company defaults to the company you specified in Installation Table - Products page, which you can override, if necessary.



Pay Group Table - Calc Parameters page 1/2



Pay Group Table - Calc Parameters page 2/2

Company	This defaults from the Definition page.
Pay Group	This defaults from the Definition page.
Effective Date	This defaults from the Definition page.
Status	This defaults from the Definition page.
Source Bank ID	If you use PeopleSoft Payroll for North America, enter a **Source Bank ID.**
Minimum Net Pay	If you use PeopleSoft Payroll for North America, this defines the **Minimum Net Pay** that can be paid to an employee in this gay group.

Maximum Net Pay If you use PeopleSoft Payroll for North America, this defines the **Maximum Net Pay** that can be paid to an employee in this gay group.

Earnings Program ID If you use PeopleSoft Benefits, you must select an **Earnings Program ID**. The other fields in this page are optional for PeopleSoft Human Resources.

Regulatory Region Enter the **Regulatory Region** associated with this pay group, if any.

For more information on **Regulatory Regions** and how they are used by PeopleSoft HRMS applications, see PeopleSoft 8 Application Fundamentals for HRMS, "Processing Transactions Using Regulatory Regions"

Holiday Schedule If you want, you can select a default **Holiday Schedule.** The value you enter here will appear as the default in employee job data.

Default Benefit Program If you use PeopleSoft Benefits, you can select a **Default Benefit Program.**

Retro Pay Program ID If you use PeopleSoft Payroll for North America, select a **Retro Pay Program ID.**

Final Check Program ID If you use PeopleSoft Payroll for North America, select a **Final Check Program ID.**

FLSA Required If you use PeopleSoft Payroll for North America, select this option if FLSA is required.

Earnings Types

Regular Hours Earnings Type If you use PeopleSoft Payroll for North America, select the **Regular Hours Earnings Type.**

OT Hours Earnings Type If you use PeopleSoft Payroll for North America, select the **OT Hours Earnings Type.**

Regular Earns Earnings Type If you use PeopleSoft Payroll for North America, select the **Regular Earns Earnings Type.**

Holiday If you use PeopleSoft Payroll for North America, select the appropriate **Holiday** value.

Canada

Contract Regular Earnings If you use PeopleSoft Payroll for North America, select the appropriate **Contract Regular Earnings** value.

Earned and Not Paid Erncd	If you use PeopleSoft Payroll for North America, select the appropriate **Earned and Not Paid Erncd** value.
Paid Not Earned Erncd	If you use PeopleSoft Payroll for North America, select the appropriate **Paid Not Earned Erncd** value.
1042 Earn Code	If you use PeopleSoft Payroll for North America, select the appropriate **1042 Earn Code.**

Netherlands

Collective Labor Agreement	Enter the appropriate **Collective Labor Agreement**, if applicable.

USA

Contract Regular Earnings	If you use PeopleSoft Payroll for North America, select the appropriate **Contract Regular Earnings** value.
Earned and Not Paid Erncd	If you use PeopleSoft Payroll for North America, select the appropriate **Earned and Not Paid Erncd** value.
Paid Not Earned Erncd	If you use PeopleSoft Payroll for North America, select the appropriate **Paid Not Earned Erncd** value.
1042 Earn Code	If you use PeopleSoft Payroll for North America, select the appropriate **1042 Earn Code.**

USF Setting Up Human Resources Management Tables

This section covers the set up of control tables specific to federal agencies. These tables are used throughout your PeopleSoft HRMS system.

When creating personnel action requests, you search fields using information entered in the Legal Authority Table, Nature of Action Table, PAR Remarks Table, and NOA/Legal Authority 1 Table.

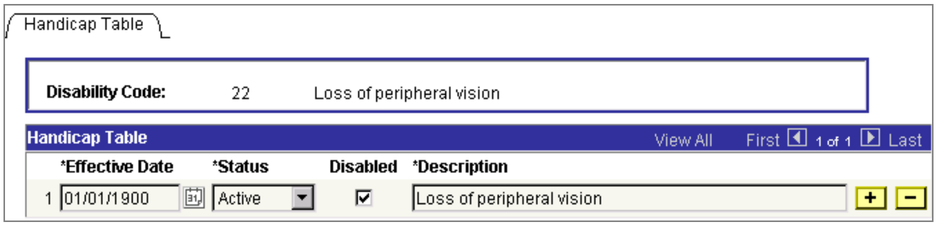
When you enter employee-specific information, you use values from the Handicap Table and LEO Pay Area Table.

Throughout your HRMS system, you use values entered in the U.S. County Table, Personnel Office ID Table, and Sub-Agency Table.

Handicap Table Page

Usage	Use the Handicap Table to assign codes to the types of disabilities an applicant or employee might have. You can set up the table with the disabilities that your agency is likely to use, adding more as needed.

Object Name	GVT_HANDICAP_TBL
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Handicap Table, Handicap Table**
Prerequisites	None.
Access Requirements	Enter a Disability Code.



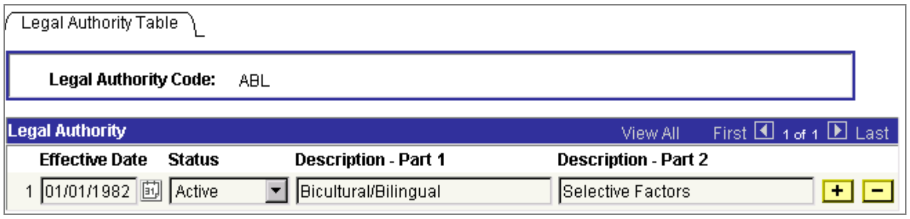
Handicap Table page

The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date, Status**, and **Description.**

Disabled Select the **Disabled** check box if the **Disability Code** describes what your agency considers a disability. In most cases you select the box. But, for example, if you set up a **Disability Code** to indicate that an applicant or employee has no disability, you leave the **Disabled** check box unselected.

Legal Authority Table Page

Usage	The Legal Authority Table provides the list of valid values that are used on the Data Control pages for Personnel Action Request (PAR) processing. 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.
Object Name	GVT_LEGAL_AUTH_TBL
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Legal Authority Table, Legal Authority Table**
Prerequisites	None.
Access Requirements	Enter a Legal Authority Code.



Legal Authority Table page

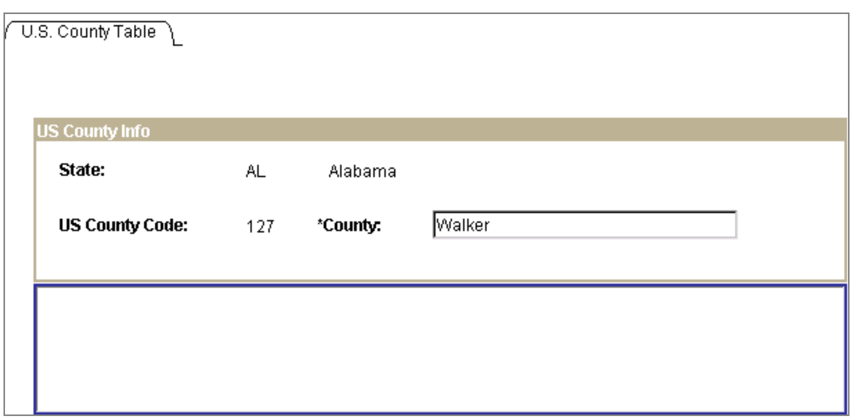
The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date, Status.**

When you add a **Legal Authority Code** to this table, you should select an **Effective Date** early enough to accommodate your organization's oldest historical record to which it will apply. Add data rows to maintain history data for information that changes over time.

Enter a **Description - Part 1** and a **Description Part - 2.** These descriptions appear on the Data Control pages when you process personnel actions for applicants or employees.

USF U.S. County Table Page

Usage	The U.S. County Table contains 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 may add to it or change an entry if needed.
Object Name	GVT_COUNTY_TABLE
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, U.S. County Table, U.S. County Table**
Prerequisites	None.
Access Requirements	Enter a State Code or a U.S. County Code.

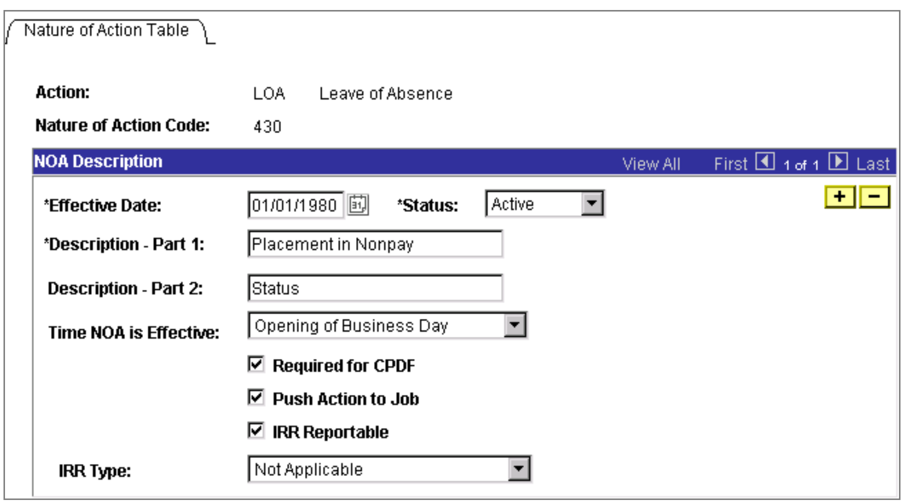


U.S. County Table page

County Enter or change the name of the **County**

Nature of Action Table Page

Usage	The Nature of Action table defines Nature of Action Codes, which are used throughout the PeopleSoft Human Resources system. Every Personnel Action Request (PAR) requires that you enter a Nature of Action (NOA) Code. Thus, every personnel action must be described in this table and assigned an NOA Code. PeopleSoft delivers the NOA Codes, but you may add or update entries as needed. When entering NOA Codes for your agency's internal use, we suggest you use codes in the 900 series. Use the Nature of Action Table page to add and review codes.
Object Name	GVT_NOAC_TBL
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Nature of Action Table, Nature of Action Table**
Prerequisites	None.
Access Requirements	Enter an Action and a Nature of Action Code.



Nature of Action Table page

The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date, Description,** and **Status.**

Nature of Action Code When you add a **Nature of Action 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.

Time NOA is Effective (time nature of action is effective)

The **Time NOA is Effective** field designates when the personnel action should take effect and defaults to ***Opening of Business Day.*** Or you can choose ***Close of Business Day*** from the list of valid values, which are from the Translate table.

If you choose ***(none),*** the field defaults to ***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 (those NOAs in the 300 series and 400 series), the action is effective at ***Close Of Business*** on the **Effective Date**.

Required for CPDF (Required for Central Personnel Data File)

If the **Nature of Action Code** is reportable to OPM from CPDF reports, select the **Required for CPDF** check box.

Push Action to Job

If the nature of action is to be applied to the core PeopleSoft JOB record from the Federal Government side after saving the personnel action, select the **Push Action to Job** check box.

IRR Processing

IRR Reportable

If an **Nature of Action Code** is to be reported to OPM on the IRR, select the **IRR Reportable** check box. This indicates that an IRR-related Nature of Actin Code is part of an IRR control record when a separation personnel action is saved.

IRR Type

Use the **IRR Type** field to select the type of IRR you want generated, such as ***Retirement, Transfer/Resignation,*** or ***Supplemental.***

Viewing the PC Business Unit Table

The PC (Project Costing) Business Unit Table is a view-only page. It is part of the Project Costing process in the Financials system, 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.

For more information on the PC Business Unit Table, see your PeopleSoft Time and Labor documentation.

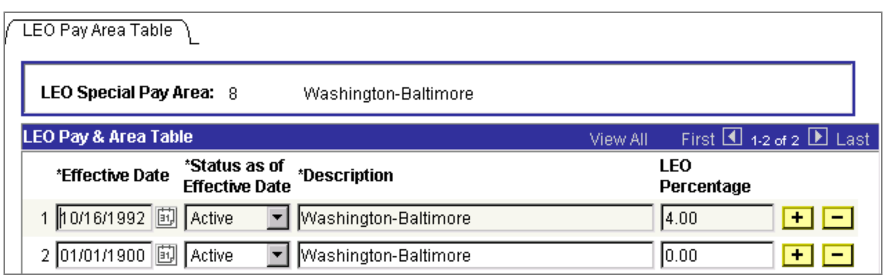
Viewing the GL Business Unit Table

The GL (General Ledger) Business Unit Table is a view-only page. It is part of the General Ledger process in the Financials system, which interacts with the Payroll process. If you don't use General Ledger, you don’t need to import the values for this table.

For more information on the GL Business Unit Table, see your PeopleSoft General Ledger documentation.

LEO Pay Area Table Page

Usage	You set up law enforcement officer (LEO) special pay areas in the LEO 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, but you can update these as necessary, based on Office of Personnel Management (OPM) updates you might receive throughout the year.
Object Name	GVT_LEOAREA_TABLE
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, LEO Pay Area Table, LEO Pay Area Table**
Prerequisites	None.
Access Requirements	Enter a LEO Special Pay Area



LEO Pay Area Table page

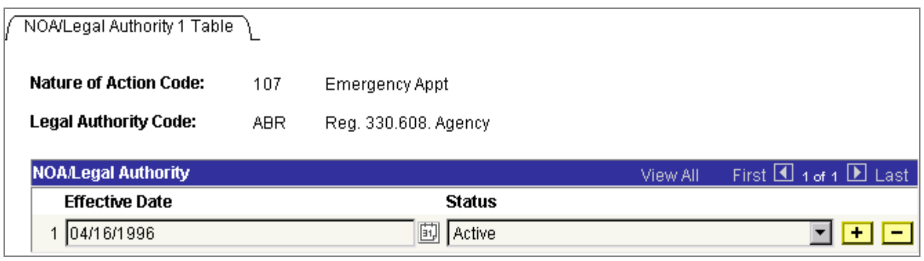
The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date, Status,** and **Description.**

LEO Percentage (Law Enforcement Officer percentage)

Enter the **LEO Percentage**. This is 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 actual amount will be reflected on their Compensation Data page in Administer Workforce.

NOA/ Legal Authority 1 Table Page

Usage	Use the NOA/Legal Authority 1 Table connects Nature of Action (NOA) codes defined in the Nature of Action Table with Legal Authorities defined in the Legal Authority Table. When you enter an NOA in the PAR Data Control page in Administer Workforce and prompt on the Authority (1) field, you only see valid values from this table. However, for Authority (2), you can select any of the Legal Authorities defined in the Legal Authority Table.
Object Name	GVT_AUTH_VAL_1
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, NOA/Legal Authority 1 Table, NOA/Legal Authority 1 Table**
Prerequisites	You must have set up Nature of Action Codes and Legal Authority Codes.
Access Requirements	Enter a Nature of Action Code and a Legal Authority Code.

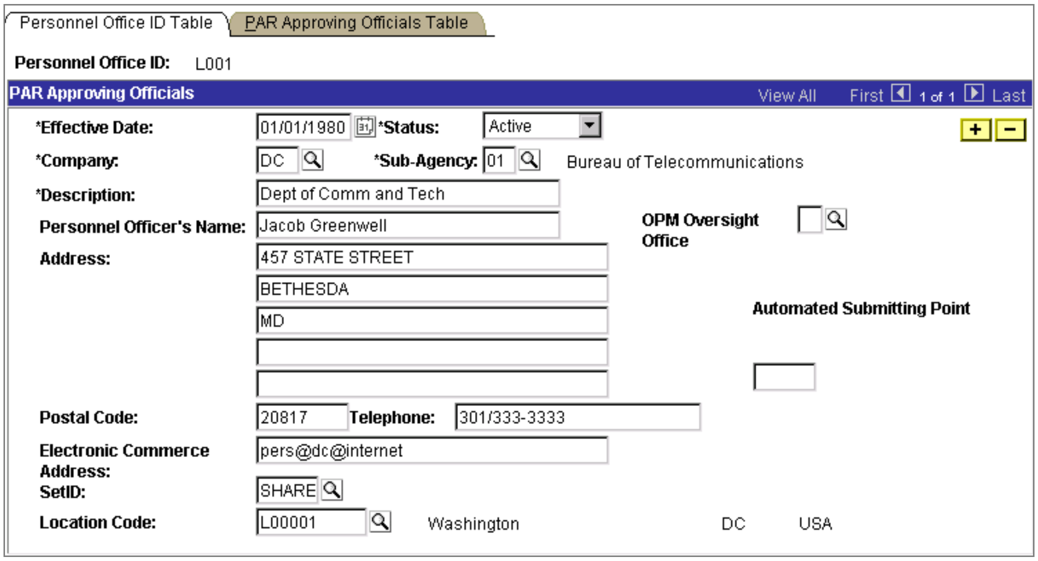


NOA/Legal Authority 1 Table page

The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date** and **Status.**

Personnel Office ID Table - Personnel Office ID Table Page

Usage	Use the Personnel Office ID Table to assign an identification number to every personnel office in your agency. Much of the information you enter here is printed on your personnel actions.
Object Name	GVT_POI_TABLE1
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Personnel Office ID Table, Personnel Office ID Table**
Prerequisites	None.
Access Requirements	Enter a Personal Office ID.



Personnel Office ID Table - Personnel Office ID Table page

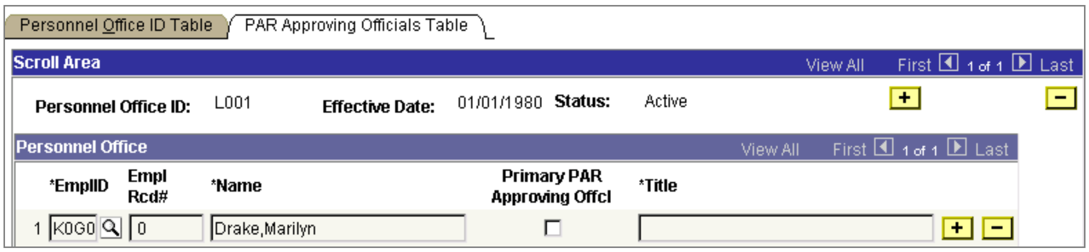
The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date, Status, Description, Address, Postal Code, Telephone, SetID,** and **Location Code.**

Company	Select the agency in the **Company** field.
Sub-Agency	Select the **Sub-Agency** code.
Personnel Officer's Name	Enter the **Personnel Officer's Name** (the name of the person responsible for personnel actions for this office).
OPM Oversight Office	Choose an **OPM Oversight Office** to which you report personnel actions from the available options. These values are stored on the Translate table for the field GVT_OPM_REG_OFC. If you need to change or add values, inform your project management office of the updates you require.
Electronic Commerce Address	The **Electronic Commerce Address** is for your agency's information only. This might be an email address or a government network ID, for example.
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 used to communicate establishment of or changes in a Personnel Office Identifier for currently operating personnel offices.

Personnel Office ID Table - PAR Approving Officials Table Page

Usage	Use the PAR Approving Officials Table page to enter the names to

	appear in the routing process section of your personnel actions.
Object Name	GVT_POI_TABLE2
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Personnel Office ID Table, PAR Approving Officials Table**
Prerequisites	None.
Access Requirements	Enter a Personal Office ID.



Personnel Office ID Table - PAR Approving Officials Table page

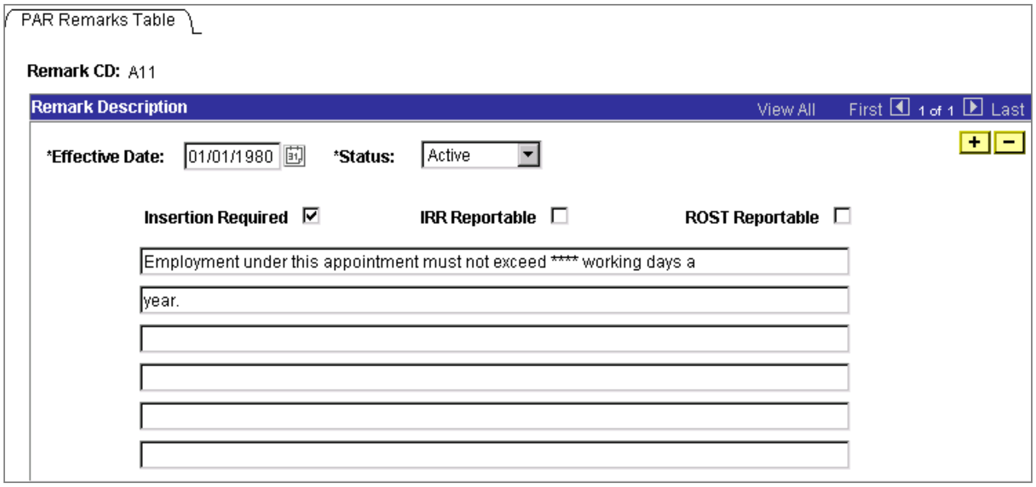
The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **EmplID, Empl Rcd #, Name,** and **Title.**

EmplID For each official who approves personnel actions, enter an **Empl ID.** When you move out of the field, the system populates the **Empl Rcd#, Name,** and **Title** fields. You can edit these fields if necessary.

Primary PAR Approving Offcl Select the **Primary PAR Approving Offcl** (Official) check box, if applicable. This check box is for your information only.

PAR Remarks Table Page

Usage	Use the Personnel Action Request Remarks page to define standardized remarks to attach to Personnel Action Requests (PARs). You use some remarks exactly as entered here, but others need employee-specific information inserted when you attach the remark at the employee level.
Object Name	GVT_SF50_RK_TBL
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Pers Action Request Remarks, PAR Remarks Table**
Prerequisites	None.
Access Requirements	Enter a SF50 Remark Code.



PAR Remarks Table page

The Office of Personnel Management (OPM) designates remark codes beginning with A-X. PeopleSoft delivers the current standard OPM PAR Remarks, but you need to maintain these, based on OPM updates you may receive throughout the year. If you need to enter additional remarks for your agency's internal use, use codes beginning with Y or Z. When you upgrade PeopleSoft HRMS, you need to retain your agency-specific remarks.

The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date** and **Status.**

Insertion Required If this remark needs employee-specific information, select the **Insertion Required** check box. When you select this remark at the employee level, this check box is unavailable.

PeopleSoft uses asterisks (*) to denote employee-specific information which is changed by your human resources personnel clerk when the remark is attached to a PAR at the employee level.

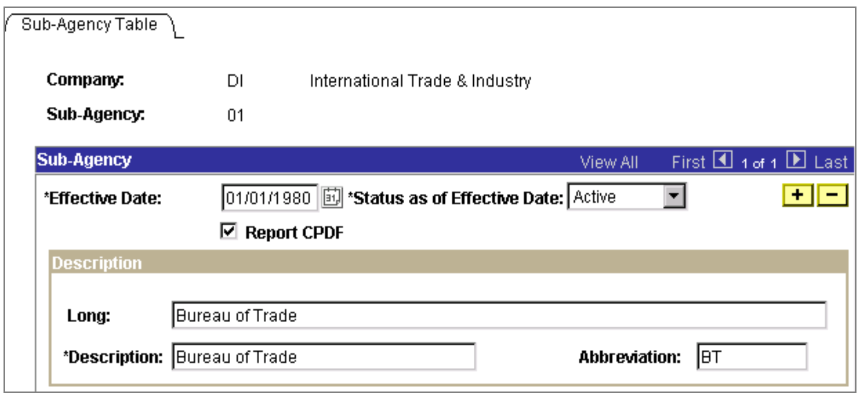
IRR Reportable If this remark will be attached to a personnel action required to be printed on an Individual Retirement Record (IRR), you have the option of also printing the remark on the IRR. To do so, select the **IRR Reportable** check box.

ROST Reportable Similarly, select the **ROST Remark** check box to have this remark printed on the Register of Separations and Transfers (ROST).

For more information on Individual Retirement Records, see USF Processing Individual Retirement Records (IRRs). For more information on Register of Separations and Transfers, USF Processing the Register of Separations and Transfers (ROST).

Sub-Agency Table Page

Usage	If your agency has multiple organizations that may report to the Office of Personnel Management (OPM) as separate entities, you define them as distinct sub-agencies for online processing purposes. Use the Sub-Agency Table to set up sub-agencies.
Object Name	GVT_SUBAGCY_TABLE
Navigation	**Define Business Rules, Manage Human Resources (USF), Setup, Sub-Agency Table, Sub-Agency Table**
Access Requirements	Enter a Company (agency) and Sub-Agency Code.



Sub-Agency Table page

The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date, Status,** and **Description.**

Report CPDF (report central personnel data files)	Select the **Report CPDF** check box if this sub-agency reports Central Personnel Data Files (CPDF) on a regular basis. This check box is informational only.
Long	Enter a **Long** description of the sub-agency.

CHAPTER 6

E&G Setting Up Service Parameters and Service Accrual Control Tables

To determine total accrued service, the tenure or flexible service calculation processes the changes in an employee's job status, such as the date of hire, leaves of absence, or maternity leave. The system considers the effective date of the job action and checks the rules you set up in the tenure and flexible service control tables to determine which time periods count toward service.

Before you can set up service rules, you must set up methods to handle time duration between dates for measuring accrued service. Once you define your duration, date rounding, and date conversion options, you can set up the service accrual control tables for Tracking Faculty Events and Tracking Flexible Service. This section describes the pages you need to complete to set up the service parameters and the service accrual control tables so that you can use the Tenure Tracking and Flexible Service Tracking features.

Setting Up Service Parameters

Tenure Tracking and Flexible Service Tracking use the elapsed time method to measure the periods between job actions. This method calculates the time duration between two raw dates by subtracting one date from the other to arrive at the service duration.

A raw date is a calendar date. August 1, 1998, or 08/01/1998, is a raw date. The service parameters components enable you to set up different date rules to adjust the effective dates (raw dates) of an employee's job history before the calculation program calculates the elapsed time period between two events (for example, between the date of hire and the date the employee goes on a leave of absence).

In the Maintain Service Parameters pages, you define basic parameters, such as how a date should be rounded, how a raw date should be converted to a decimal date, and how to calculate a year (you tell the system to assume a certain number of days per month, 30 days being the most common-or to use the calendar month).

In addition, you set up the database alias (EVENT_DT) to define the reference to the job history. You can also turn on the application trace, which traces the calculation during a calculation run.

Using Service Parameters in Tenure Tracking and Tracking Flexible Service

Service parameters are generic across both tenure and flexible service calculations. Once you set up a method, it can be reused as often as necessary in both flexible service and tenure service definitions.

For example, you would use these options in defining a flexible service definition for a seniority rule. A seniority service rule may state the following:

- A hire date is effective the first day of the month of hire.
- Leave of absence doesn't count toward service. Any leave is considered effective the first day of the month if its start date is before the fifteenth.
- A return from leave reinstates service accrual and is considered effective the first day of the month of return.

The service year you are using has two semesters: August 1, 1997 to December 31, 1997 and January 1, 1998 to May 31, 1998. Your rules specify that each semester counts as 0.50 years of service.

You set up HR Action Categories for Hire, Leave of Absence, and Return from Leave.

You can set up two date rounding options. One option rounds the effective date of the history to the first of the month. The other option rounds the effective date of the history to the first of the month, if the date is before the fifteenth.

You can then apply these two rounding options to the HR Action Categories, using the Service Rules component.

Let's say an employee is hired on August 3, 1997. She begins a leave of absence on October 13, 1997 and returns to work on December 1, 1997. Her job history looks like this:

Action	***Effective Date***	***Adjusted Effective Date for Service***
Hire	08/03/1997	08/01/1997
Leave	10/13/1997	10/01/1997
Return	12/01/1997	12/01/1997

For the semester of August 8, 1997 to December 31, 1997 (08/01/1997 to 12/31/1997), the employee accrues service as follows: 0.20 years for the period 08/01/1997 to 09/31/1997 and 0.10 years for the period 12/01/1997 to 12/31/1997. For the same semester, 0.20 years aren't counted toward accrual for the period 10/09/1997 to 11/30/1997.

There are two major steps to setting up your service parameters if you are tracking tenure and three major steps if you are tracking flexible service:

1. Create a duration option.

   You can use the Calculation Option Rules page to create a calculation method such as

ACAD10 and set parameters associated with this method. On the Conversion Options Rules page, you set up a raw-date-to-decimal-date conversion method.

2. Create a date round option.

   Use the Date Round Option Rules page to set up a date round option. You name it ACAD10 to correspond to the ACAD10 duration option you set up in step 1.

3. *For flexible service only*, set up a conversion option to convert from a decimal year to the format number of years/months/days. In this case, you can name it ACAD.

Understanding Date Math Methods

Any date expressed in terms of years, months, and days is a raw date. Raw date subtraction subtracts days from days, months from months, and years from years.

Here is an example to illustrate the method. For purposes of our example, the raw dates are formatted as YYYY/MM/DD.

```
  1998/01/01
- 1996/08/01
  0001/05/00 or one year, five months and zero days.
```

Consider, however, the following subtraction:

```
  1998/11/01
- 1995/12/15
```

You can't subtract 15 (days) from 1, so you have to convert one of the months to days. But when you change the 11 months to 10, how many days do you carry to the "day" column?

When you set up raw date subtraction methods, you choose whether to use the actual number of days each month or an assumed number of days each month.

If you use the actual number of days per month, the number of days depends on the month in question. In this case, the tenth month (October) is the most recent full month that you can convert to days. October has 31 days, so 98/11/01 becomes 98/10/32. You still have to convert one year to months to complete the subtraction, but you know there are always twelve months per year. You end up, then, with a date of 97/22/32 and our equation yields:

```
  1997/22/32
- 1995/12/15
  0002/10/17 or two years, ten months, and seventeen days.
```

If you assume 30 days per month, 1998/11/01 becomes 1998/10/31, and after you again convert one year to twelve months, you end up with 1997/22/31. The equation is now:

```
  1997/22/31
- 1995/12/15
  0002/10/16 or two years, ten months, and sixteen days.
```

Establishing Duration Options

Duration options instruct the system on the nuts and bolts of calculating a duration. In both Tenure and Flexible Service Tracking, the duration option is the method used to calculate the period of time between two action events, such as a date of hire and a leave of absence. The system calculates a duration by subtracting the earlier date from the later date using raw date subtraction. The remainder is the duration.

The following sections describe the parameters and methods that the system uses to calculate duration. You use the Calculation Option page to choose a duration calculation method and set up parameters. Use the Conversion Options page to set up a method for converting raw dates to decimal dates. The flexible service and tenure service processes use the conversion method after performing the subtraction.

After performing the raw date subtraction and arriving at a duration using the calculation methods set up on the Calculation Option page, the system has to convert the duration to decimals. When you convert raw dates and durations to decimal equivalents, you have to convert months and days to partial years. There are a number of different ways to do this depending on the decimal conversion assumptions and the decimal conversion method you select in the fields on the Conversion Options page.

Setting Raw Date Subtraction Parameters

As in our earlier discussion of raw date subtraction, you have to convert months to days in order to perform subtractions where the smaller (earlier) date has fewer days than the larger (later) date. For example:

```
1998/11/01
1995/12/15
```

On the Calculation Option page, you can convert the month using either Assumed Days Per Month or Actual Days Per Month.

We recommend that you use Assumed Days Per Month to avoid possible rounding issues.

If you use Assumed Days Per Month, enter a fixed number of days in the adjacent field. This number is used regardless of the month in question.

If you use Actual Days Per Month, the number of days depends on the month in question. In this case, the tenth month (October) is the most recent full month that you can convert to days. October has 31 days, so 1998/11/01 becomes 1998/10/32.

Choosing Rounding Methods

Using raw date subtraction, you can choose to round your dates before calculating the duration.

You round by completing the Month Round Rule and Day Round Rule parameters on the Calculation Option page. For raw date subtraction, the "month" and "day" portion of the labels tells you which box to use.

For example, to round days to months when using raw date subtraction, use the day round rule.

To round up only, choose Round Up if Periods > and enter the threshold number of periods when the system should start rounding up. For example, you could round days up to a full month after 25 days. To round up or down, choose Round Up if Periods > ...Else Round Down and again enter the number of periods. If you don't want to round the duration at all, select None.

Important! These rounding options operate on the duration endpoint dates. That is, the dates are rounded before the system performs raw date subtraction.

Rounding Decimal Dates and Durations

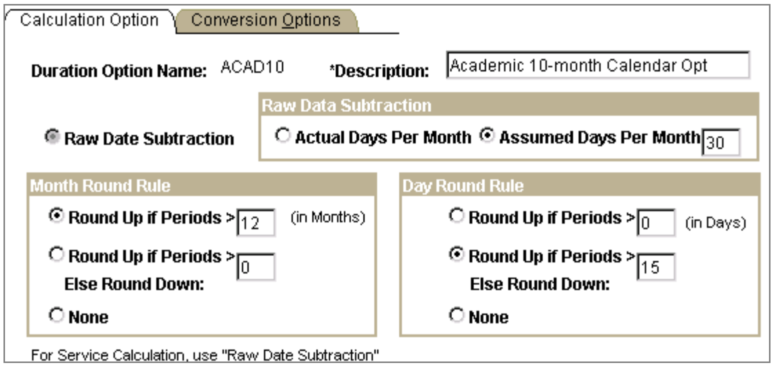
The Month Conversion Rules and Year Conversion Rules you select on the Duration Option - Conversion Options Page perform rounding operations during your duration processing. For raw date subtraction, the system uses these settings to round the final duration result.

The settings work the same regardless of which value you're rounding. You can choose Up to round to the next month or year, Down to round to the previous month or year, or Near to round to the closer of the two rounded values. You can also choose None to avoid rounding altogether.

To round the endpoints for the raw date method, use the rounding rules on the Duration Option - Calculation Option Page.

Duration Option - Calculation Option Page

Usage	Use the Duration Option - Calculation Option page to choose a calculation method and set parameters associated with the method.
Object Name	EG_AGECALC_PERIOD
Navigation	**Define Business Rules, Maintain Service Parameters, Rules, Duration Option, Calculation Option**
Prerequisites	None
Access Requirements	Enter a Duration Option Name in the search dialog box.



Duration Option - Calculation Option page

The following field is common to multiple pages and is defined at the front of this PeopleBook in PeopleBook Standard Field Definitions: **Definition.**

Date Math Method

Raw Date Subtraction	The **Raw Date Subtraction** check box defaults to ***on*** (checked).

Raw Date Subtraction

Actual Days Per Month	Select this option if you want the system to calculate duration using actual days in each month.
Assumed Days Per Month	Select this option if you want the system to assume that there are a certain number of days in each month. Enter the assumed number of days in the field next to this option.

For more information about raw date subtraction, see Setting Decimal to Raw Date Conversion Options and Understanding Date Math Methods.

Month Round Rules

Round Up if Periods > XX (in Months)	Select this option if you want the system to round up if the period is greater than the number of months you specify here.
Round Up if Periods > XX Else Round Down	Select this option if you want the system to round up if the period is greater than the number of months you specify here and round down if it is equal to or less than the number of months.
None	Select this option if you don't want the system to round the months.

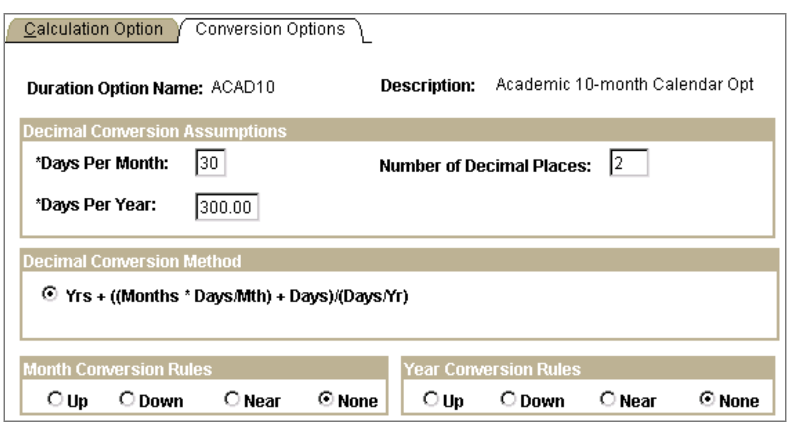
Day Round Rules

Round Up if Periods > XX (in Days)	Select this option if you want the system to round up if the period is greater than the number of days you specify here.
Round Up if Periods > XX Else Round Down	Select this option if you want the system to round up if the period is greater than the number of days you specify here and round down if it is equal to or less than the number of days.
None	Select this option if you don't want the system to round the days.

For more information see Duration Option - Conversion Options Page.

Duration Option - Conversion Options Page

Usage	Use the Duration Option - Conversion Options page to set up a method for converting raw dates to decimal dates. The flexible service and tenure service processes use the conversion method after performing the subtraction.
Object Name	EG_AGECALC_PARMS
Navigation	**Define Business Rules, Maintain Service Parameters, Rules, Duration Option, Conversion Options**
Prerequisites	Calculation Options page
Access Requirements	Enter a Duration Option Name in the search dialog box.



Duration Option - Conversion Options page

Decimal Conversion Assumptions

Days Per Month — Enter the number of **Days per Month** you want the system to assume in converting raw dates to decimals.

Days Per Year — Enter the number of **Days per Year** you want the system to assume in converting raw dates to decimals.

Number of Decimal Places — At all points in the conversion process, decimals are rounded to as many places as you specify in the **Number of Decimal Places** field.

Note. The number of decimal spaces you specify here is used for the internal conversion from raw date to decimal date in the batch calculation process. The final service amount calculated for each computational period in both tenure and flexible service calculation processes is rounded to two decimal places.

Decimal Conversion Method

The system supports one decimal conversion formula: ***Yrs +((Months *Days/Mth) + Days) / (Days/Yr).***

The formula converts the months to days, adds this to the remaining days, and then converts the total days to years to calculate the decimal portion of the duration. This is then added to the years to find the total duration.

In this case, you have to specify the assumed **Days Per Month** and the assumed **Days per Year.**

Month Conversion Rules

From the following choices, select a rule for converting months: Up**,** Down, Near, **and** None.

See the page discussion below on rounding decimal dates and durations.

Year Conversion Rules

From the following choices, select a rule for converting years: **Up, Down, Near,** and **None.**

See the page discussion below on rounding decimal dates and durations.

Defining Date Rounding Methods

Use the Date Round Option page to define date rounding rules, that is, how you want the effective date of a job status change to be rounded off in computing the amount of tenure or flexible service an employee accrues. Tenure tracking and flexible service both round off dates to simplify calculations.

Employees do or do not accrue flexible service or tenure service, depending on their employment status. Status changes are reflected in the employee's Action/Reason history in the PeopleSoft Human Resources job history records: hires, leaves, returns from leave, terminations, and any other Action/Reason codes you choose.

Because of differences in the rules established for different employee groups, you occasionally need to adjust the effective date, depending on the type of job status change. For example, suppose your organization allows an employees to accrue service beginning the first of the month if they are hired before the fifteenth of the month. You can set up a date round option to round the effective date of hire to the first of the month for all employees hired before the fifteenth.

For more information on the control tables used to define job status, see Defining HR Action/Categories.

Rounding Rule

To create a rounding rule, you set up all three parts of the rule: the rounding day, the rounding rule, and the rounding period.

Rounding Day	***Rounding Rule***	***Rounding Period***
first day of	the next	Month
last day of	the previous	Month

When you are rounding to the last day of the period, you don't have to specify your rounding rule: The date is always rounded to the last day of the current period. For example, if you are rounding to the last day of the calendar month, August 3, 1998 becomes August 31, 1998.

If, however, you're rounding to the first day of a period, you have several options: You can round to the Next, the Coincident or Next, the Previous, the Coincident or Previous, or the Near (nearest) rounding day.

You can also make your rounding dependent on a threshold number of days in the month or a threshold number of months in the year by selecting Up if Day/Month => (greater than or equal to) or Up if Day/Month => Else Round Down. Both options round up after a threshold number of days (if the rounding period is months) or months (if the rounding period is any kind of year). However, the first option doesn't round dates under the threshold, whereas the second option actually rounds down.

The following tables illustrate how each of these options works. In all cases, assume you are rounding to the first of the month.

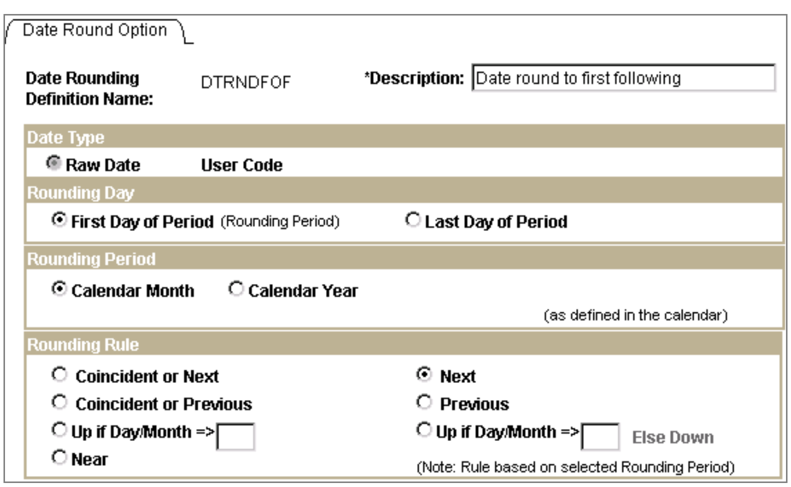
Rounding Rule	***Base Date***	***Rounded Date***
Coincident with or Next Following	5/1/1995	5/1/1995
Coincident with or Next Following	5/2/1995	6/1/1995

Next Following	5/1/1995	6/1/1995
Coincident with or First Previous	5/1/1995	5/1/1995
First Previous	5/1/1995	4/1/1995
First Previous	5/2/1995	5/2/1995
Near	5/3/1995	5/1/1995

Threshold Rounding Rule	***Base Date***	***Threshold***	***Rounded Date***
Round Up if...	5/17/1995	15	6/1/1995
Round Up if...Else Round Down	5/17/1995	15	6/1/1995
Round Up if...	5/17/1995	20	5/17/1995
Round Up if...Else Round Down	5/17/1995	20	5/1/1995

Date Round Option Page

Usage	Use the Date Round Option page to set up date rounding rules.
Object Name	EG_DATE_ROUND
Navigation	**Define Business Rules, Maintain Service Parameters, Rules, Date Round Option, Date Round Option**
Prerequisites	None
Access Requirements	Enter a Date Rounding Definition Name in the search dialog box.



Date Round Option page

The following field is common to multiple pages and is defined at the front of this PeopleBook in PeopleBook Standard Field Definitions: **Description.**

Date Type

The **Date Type** defaults to **Raw Date** for tenure and flexible service calculation.

Rounding Day

In this group box, choose whether to round to the **First Day of Period** or the **Last Day of Period**.

Rounding Period

Choose whether the **Rounding Period** should be **Calendar Month** and **Calendar Year**. Because you are managing job history records in tenure service and flexible service calculation, you would most likely choose to round the effective date by calendar month.

Rounding Rule

To create a rounding rule, you set up all three parts of the rule: the rounding day, the rounding rule, and the rounding period.

Select a rounding rule from the following choices:

Coincident or Next

Coincident or Previous

Up if Day/Month =>

Near

Next

Previous

Up if Day/Month =>, Else Down

If you select **Last Day of Period,** the **Rounding Rule** group box becomes unavailable.

For more information on the rounding rule, see Rounding Rule.

Establishing Date Conversion Methods

Use the Date Conversion Option page to establish a method for converting raw dates to decimal dates and vice versa.

This conversion option is required only for calculating flexible service. It isn't available for tenure.

In flexible service, the calculation process converts the total accrued service from a decimal year (with two decimal places) to the years/months/days format, based on the date conversion option you select for each flexible service type within the calculation group being processed.

You should set up a date conversion option that corresponds to a duration option. The date math should be the same in calculating the service amount and converting the amount to a different display format.

Setting Decimal to Raw Date Conversion Options

The flexible service calculation process requires a conversion from a decimal date (the service amount) to a raw date (number of years/months/days).

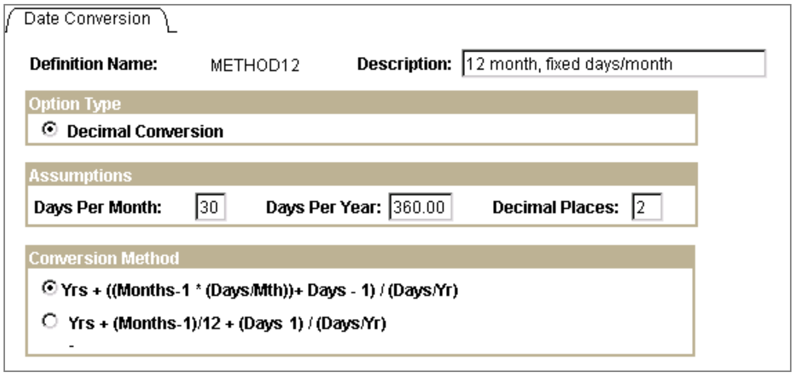
The conversion methods use (Months - 1) and (Days - 1) instead of just Months and Days. This represents the number of whole months and days. For example, in the sample date of 06/6/92, you're only six days into the sixth month (June). Therefore, the last whole month is the fifth month (May). The (Days - 1) component similarly discounts the present day, ensuring that 1/1/90 becomes 1990.0000 and vice versa.

The conversion methods illustrate the conversion from a raw date to a decimal date, but for flexible service conversion, you use the rules to reverse the conversion from a decimal date to a raw date.

For example, suppose an employee has accrued 5.25 years of service. If you are assuming 30 days per month and 360 days per year, and you are using two decimal places, either conversion method converts this amount to years/months/days format as follows: 05 years, 03 months, and 0 days.

Date Conversion Option Page

Usage	Use the Date Conversion Option page to set up a date conversion method.
Object Name	EG_DATE_CONV
Navigation	**Define Business Rules, Maintain Service Parameters, Rules, Date Conversion Option, Date Conversion**
Prerequisites	Duration Option component
Access Requirements	Enter a Definition Conversion in the search dialog box.



Date Conversion Option page

The following field is common to multiple pages and is defined in PeopleBooks Standard Page Element Definitions **Description.**

Option Type

The **Option Type** defaults to **Decimal Conversion**.

Assumptions

Days Per Month Enter the number of **Days Per Month** that you want the system to assume when performing conversions.

Days Per Year Enter the number of **Days Per Year** that you want the system to assume when performing conversions.

Decimal Places Enter the number of **Decimal Places** you want the system to use in the final decimal figure.

Conversion Method

Choose one of the two formula methods:

- Yrs + ((Months-1 * (Days/Mth)) + Days - 1) / (Days/Yr)
- Yrs + (Months-1)/12 + (Days - 1) / (Days/Yr)

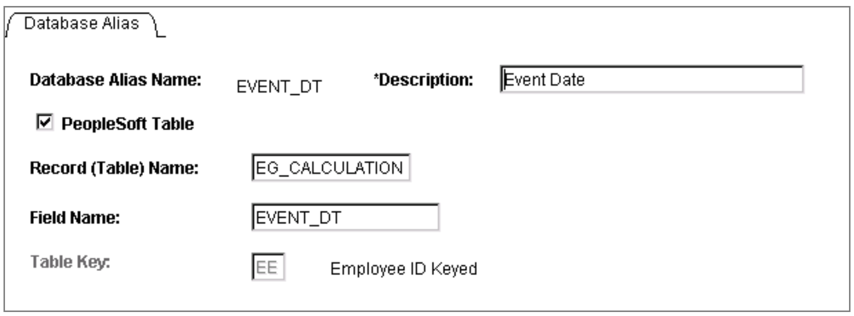
For more information on the rounding rule, see Setting Decimal to Raw Date Conversion Options.

Establishing a Database Alias

Use the Database Alias page to set up a database alias called EVENT_DT for referencing the Effective Date field on the Job Table. Use EVENT_DT to define the end date of a service type on the Calculation Group control table page when you set up a service type. You must use the name EVENT_DT, because the batch calculation process references this name.

Database Alias Page

Usage	Use the Database Alias page to set up an Event_DT alias for referencing the Effective Date field on the Job Table.
Object Name	EG_ALIAS_ENTRY
Navigation	**Define Business Rules, Maintain Service Parameters, Variables, Database Alias, Database Alias**
Prerequisites	None
Access Requirements	Enter a Database Alias Name. To create the EVENT_DT alias, enter EVENT_DT.



Database Alias page

Database Alias Name Enter ***EVENT_DT*** to create a database alias for referencing the Effective Date field on the Job Table

Description Enter ***Event Date***.

PeopleSoft Table Select this check box.

Record (Table) Name JOB

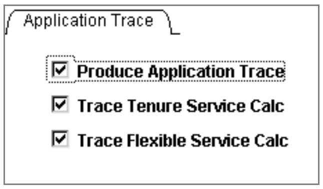
Field Name EFFDT

Table Key ED

Application Trace Page

Usage	Use the Application Trace page to turn on the Application Trace. The application trace provides you with a way to audit the application. Setting the application trace is very useful during the implementation phase of the Flexible Service or Tenure Service Calculation process. You don't want to switch on the trace when running the calculation on a regular basis. The application trace writes to the Service Audit Table (EG_AUDIT_TRACE), storing the internal calculation details in a calculation run.
Object Name	EG_AUDIT_PNL

Navigation	**Define Business Rules, Maintain Service Parameters, Rules, Application Trace, Application Trace**
Prerequisites	None
Access Requirements	None



Application Trace page

Produce Application Trace Select this check box to turn on the application trace.

Trace Tenure Service Calc (Calculations) Select this check box to trace tenure service calculations.

Trace Flexible Service Calc (Calculations) Select this check box to trace flexible service calculations.

Setting Up Service Accrual Control Tables

Methods of calculating and tracking employee service and tenure vary among different groups at the same organization and from one organization to the next. The Administer Flexible Service and Tracking Tenure features provide setup tables where you establish the service rules that best fit your organization. These service rules provide the basis for the flexible service and tenure accrual processing.

You can define your service Calendars, establish HR Action/Categories to categorize the job action/reason codes that count toward service accrual, and define your Date Rounding options.

The service rules become part of a Definition Name, which you then assign to a service type. The system processes service types based on the service rules defined within the Definition Name. Grouping service rules together under a Definition Name gives you and your organization flexibility when determining calculation rules for different types of service accrual processing.

Service types belong to a calculation group. The calculation group can be associated with one or more service types. The calculation group enables you to group employees who have the same calculation rules applied to their service accrual process.

Establishing Service Calendars

Use the Calendar page to establish the calendar service years to be used within your organization. On this page you set the number of months and periods in a service year, as well as the begin and end dates for each period in the year.

The period begin/end dates are crucial in the service accrual process. These are the dates against which service is accrued for your employees. For example, an organization might have the following definitions:

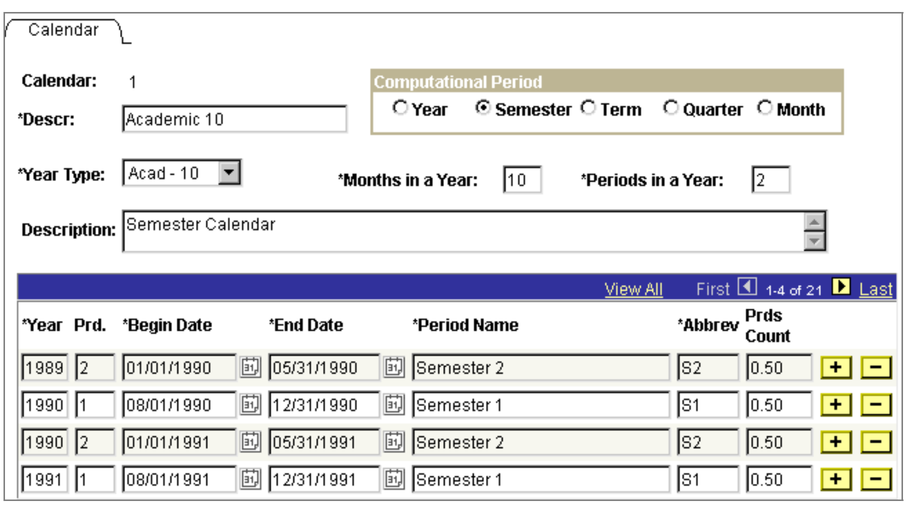
- An academic year of ten months (August 1 to May 31). The year has two periods that span five months each. Service is accrued based on each five-month period.
- A fiscal year of 12 months (from July 1 to June 30). The year has one period that spans the full 12 months. A fiscal year calendar might be used to accrue service credits for seniority.

When you create a new calendar, make sure you enter information in all the fields in the calendar grid and add a row for each period in each year against which you want the calendar to enable service to accrue.

The flexible service and tenure tracking batch processes don't accrue service credits for dates not represented on the calendar. Therefore, you must ensure that the calendar being used by a particular service type spans the date range for the accrual process.

Calendar Page

Usage	Use the Calendar page to establish the calendar service years to be used within your organization.
Object Name	EG_FLXSVC_CALNDR
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, Calendar, Calendar** • **Develop Workforce, Manage Faculty Events, Setup, Calendar, Calendar**
Prerequisites	None
Access Requirements	Enter a Calendar name in the search dialog box.



Calendar page

The following fields are common to multiple pages and are defined in PeopleBooks Standard Page Element Definitions **Descr (Description),** and **Description.**

Computational Period Select **Year, Semester, Term, Quarter,** or **Month** as the time frame to be used in accruing flexible service or tenure.

Year Type Select a **Year Type** on which to base calculations, then specify the number of **Months in a Year** and **Periods in a Year** you want for this Year Type. For example, you can set an academic year of ***10*** months, divided into ***4*** periods (quarters).

Your system is delivered with two **Year Types**: ***Acad-10*** and ***Fiscal-12.*** You can make additional entries on the Translate Table.

Months in a Year Enter the number of months in the **Calendar** year you are defining.

Periods in a Year Enter the number of periods in the **Calendar** year you are defining.

Full Description If required, enter a detailed description of the **Calendar** year you are defining.

Year Enter the calendar **Year** covered by the defined **Calendar**. For example, if the academic year of 1998 comprises two semesters, one starting in September 1997 and the other in January 1998, you enter 1998 in this column for both semester rows.

Prd (Period) Enter the **period** for the defined **Calendar** year. Enter the calendar period numbers in sequence--for example, ***1*** through ***4,*** if you selected ***Acad-10*** divided into ***4*** periods.

Begin Date Enter the period's **Begin Date**.

End Date Enter the period's **End Date**.

Important! When you enter **Begin Date** and **End Date** on the employee's Service History page and on the Tenure Calculation or Flexible Service Calculation run control pages, make sure they match these dates exactly. Otherwise, the process won't run. For this reason, you might have to define calendars solely for the purposes of accommodating employees whose start dates don't correspond to an existing calendar period **Begin Date** and **End Date**.

Period Name Enter the **Period Name**.

Abbrev (Abbreviation) Enter an abbreviated name for the period.

Prds (Periods) Count	Using a decimal value of up to two decimal places, indicate how much the period counts toward the entire year (for instance, if there are four periods, each period could count to 0.25 of the total year). This value is used to calculate how much credit an employee receives for working the period.

Defining HR Action/Categories

Use the HR Action/Category page to group together job action/reasons that count toward service and tenure accrual. The job action/reason codes identified in the HR Categories are processed against the employee's job records during the accrual process.

The purpose of the HR Action/Category page is to group similar actions/reasons that count toward service and tenure accrual. By grouping the categories, you eliminate the need to identify them individually on the Service Include Category page. Defining HR Action/Categories on this page doesn’t, by itself, identify which HR job actions and reasons to count towards tenure. This step is completed on the Service Include Category page.

HR Action/Category processing rules may differ among different faculty or employee groups, requiring you to set up multiple HR Categories. For example, one HR Category may include the job actions of Hire, Terminate, and Leave, as well as six or seven reasons that make each action eligible to count for service credits. Another HR Category may include the job actions of Hire, Terminate, and Leave, with only one or two reasons that make the action eligible to accrue service credits. While these HR Categories are similar, they have different processing rules.

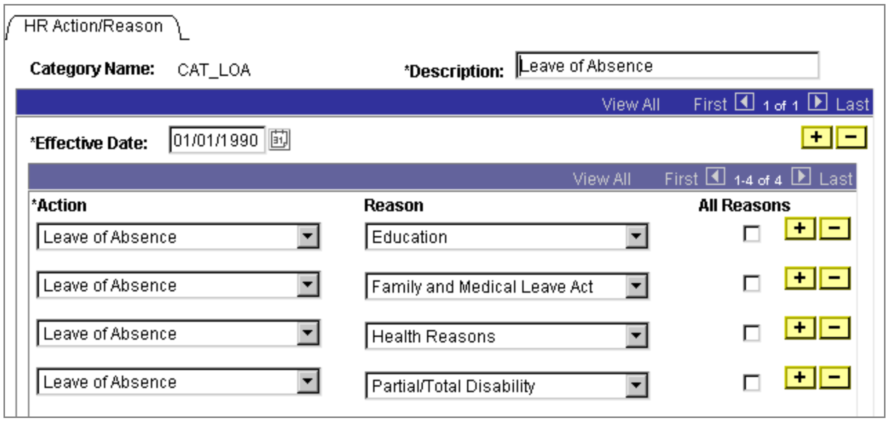
You can only reference job action/reason codes through HR categories. Even if a category consists of a single action or action/reason combination, you must include the job action/reason within an HR Category in order to reference that code in the flexible service rules.

For more information about setting up service rules definitions, see Specifying Service Rules Using the Service Rules Component.

HR Action/Category - HR Action/Reason Page

Usage	Use the HR Action/Category - HR Action/Reason page to identify which job action/reasons count toward service accrual.
Object Name	EG_HR_CATEGORY
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, HR Action/Category, HR Action/Reason** • **Develop Workforce, Manage Faculty Events, Setup, HR Action/Category, HR Action/Reason**
Prerequisites	None
Access	Enter a Category Name in the search dialog box.

Requirements	



HR Action/Category - HR Action/Reason page

The following fields are common to multiple pages and are defined at the front of this PeopleBook in PeopleBook Standard Field Definitions: **Description** and **Effective Date.**

Category Name Displays the service **Category Name** you entered in search dialog box. If you are adding a new category, enter a new **Category Name** that describes the type of job actions/reasons to which the category applies in the Add-HR Action/Reason search dialog box. Examples of **Category Names** include ***CAT_LOA*** and ***CAT_HIR.***

Action From the list of available options, select the job **Action** that should accrue toward service within this **HR Category**. To include more than one **Action** for this category, click the **Insert Row** toolbar button to add rows.

Reason To include specific **Reason** codes for a particular job **Action** and make it eligible to accrue service credits, select the **Reason** from the list of available options.

You can specify more than one **Reason** for an **Action** by adding a row and selecting the same **Action,** but a different **Reason**.

All Reasons To specify that all **Reason** codes for a particular job **Action** are eligible to accrue service credits, select the **All Reasons** check box. You don't need to add a row for each reason.

Specifying Service Rules Using the Service Rules Component

Use the Service Rules component to establish a Definition Name and its associated service rules. The Definition Name you establish here provides the calculation rules the system uses when executing the service accrual process. The service rules you assign to the Definition Name are linked to a Service Type. Credits for each Service Type are processed based on the service rules of the associated Definition Name. This enables each service type to have a different set of calculation rules that govern the service accrual process.

Consider the following when specifying service rules:

- How do you want your rules to accommodate employee job actions that fall within a service unit of measure you have defined (that is, a month or a day)? Do you want to round off a unit? For instance, if the date of hire is October 5, do you want the entire month of October to count toward the employee's accrued service?
- Are service credits affected by other factors, such as a leave of absence or a job-related disability?

There are six pages in the Service Rules component: Service Definition, Service Include Category, Service Add Periods Rules, Service Adj Future, Service Final Handling, and Min/Max Service Rules. Each page contributes to the service rules that make up the Definition Name.

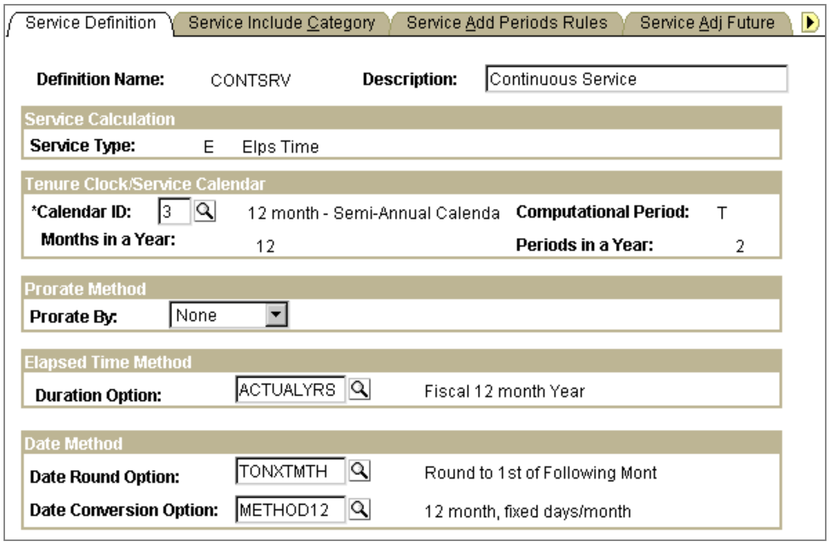
Overview of the Service Definition Page

On the Service Rules - Service Definition setup page you specify the following criteria:

- Which Calendar to use
- Which Prorate Method to use (FTE or None)
- Which Elapsed Time Method and Date Method for rounding to use

Service Rules - Service Definition Page

Usage	Use the Service Definition page to associate a Calendar, a Proration Method, and a Date Method (for rounding) to the Definition Name.
Object Name	EG_SVC_DEFINITION
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Definition** • **Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Definition**
Prerequisites	Calendar page
Access Requirements	Enter a Definition Name in the search dialog box.



Service Rules - Service Definition page

The following field is common to multiple pages and is defined in PeopleBooks Standard Page Element Definitions **Description.**

Definition Name — Displays the **Definition Name** that you selected in the search dialog box. If you are creating a new definition, enter a new **Definition Name** for this set of service rules in the Add-Service Rules search dialog box.

Service Calculation

Service Type — The system displays the **Service Type** calculation method used to calculate accrued service. By default, the system uses the **elapsed time method**. This method measures the time duration between two dates, taking into account the HR Action/Category event changes on the employee's job history.

For more information on the elapsed time method, see Establishing Duration Options.

Tenure Clock/Service Calendar

Calendar ID — Select the **Calendar ID** to use for this **Definition Name.** Calendars are maintained on the Calendar page. For example, you might link the definition name ***FACULTY*** to a service calendar you have based on the academic year using a **Computational Period** of a semester, 10 **Months in a Year** and two **Periods in a Year**

Months in a Year Based on the **Calendar ID** you select, the system displays the number of months per year for the selected calendar, as defined on the Calendar page.

Computational Period Based on the **Calendar ID** you select, the system displays the period of time on which the service calculation is based. For example, ***S*** indicates that the computational period is a semester. This field defaults from the selected calendar, maintained on the Calendar page.

Periods in a Year Based on the **Calendar ID** you select, the system displays the number of periods per year for the selected calendar, maintained on the Calendar page.

Prorate Method

Prorate By Select a **Prorate By** method from the available options. Depending on the type of service being tracked, you can set the prorate method to ***None*** or ***FTE*** (full time equivalent).

Pro-rate if below Enter the percentage of full-time equivalent (for example, .***80***) below which you want the system to prorate accrued service. The system calculates any FTE value equal to or greater than this value as 1.0 for the purpose of proration. This field isn't visible if you select ***None*** in the **Prorate By** field, and the system calculates all FTE values as 1.0.

Elapsed Time Method

Duration Option Select a **Duration Name** from the list of available options. You can set up different ways to calculate elapsed time using the Duration Option pages.

Date Method

Date Round Option Select a date rounding method to be used in calculating service dates. You set date rounding options on the Date Round Option page.

Date Conversion Option Select a date conversion method, such as ***ACAD,*** from the list of available options. Date conversion methods are established and maintained on the Date Conversion Options page. This field only applies to the Flexible Service Tracking area. It doesn't apply to Tenure Tracking.

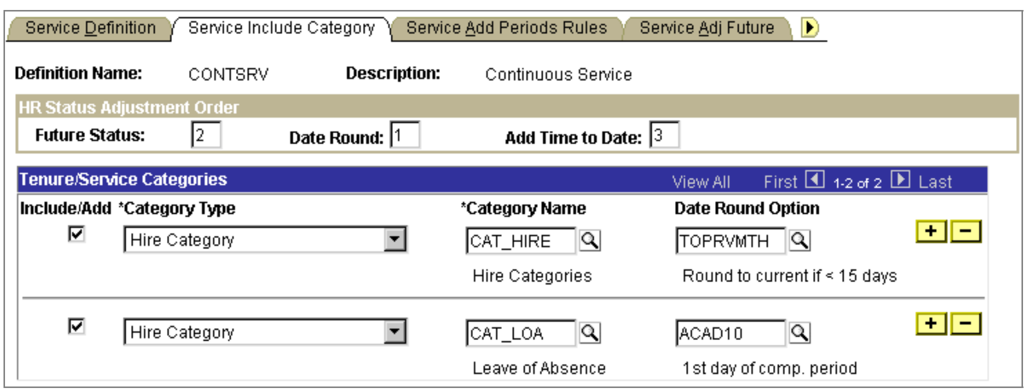
Overview of the Service Include Category Page

Use the Service Include Category page to specify which HR Action/Categories are included in the service accrual process within the selected Definition Name. You also specify the date rounding options for each of the HR Categories included on this page.

Employees accrue service credits based on the action/reason codes in their job history. HR Action/Categories are defined on the HR Action/Category page and are composed of one or more Job Action/Reason codes. The action/reason codes defined within the HR Category determine if an employee accrues credits for each job action/reason.

Service Rules - Service Include Category Page

Usage	Use the Service Include Category page to specify which HR service categories are included or excluded in the service accrual process within the selected Definition Name.
Object Name	EG_SVC_STATUS
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Include Category** • **Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Include Category**
Prerequisites	Service Definition page
Access Requirements	Enter a Definition Name on the search dialog box.



Service Rules - Service Include Category page

HR Status Adjustment Order

Because you can make multiple adjustments to status, and each change will have the same date, you need to tell the batch calculation process in what sequence to apply these adjustments. Using **HR Status Adjustment Order**, indicate when the adjustments are made. For example, do you round a date before adding time or after?

Future Status

Indicate whether the system should consider the **Future Status** adjustment type (from the Service Adj Future page) before or after **Date Round** options or **Add Time to Date** by entering its order number (from ***1*** to ***3***).

Date Round

Indicate whether the system should consider the after **Date Round** options adjustment type (from the **Date Round Option** on this page) before or **Future Status** or **Add Time to Date** by entering its order number (from ***1*** to ***3***).

Add Time to Date

Indicate whether the system should consider the **Add Time to Date** adjustment type (from the Service Add Periods Rules page) before or after **Future Status** or **Date Round** options by entering its order number (from ***1*** to ***3***).

Tenure/Service Categories

Include/Add

Select the **Include/Add** check box to have the service category you select in the **Category Name** field count toward service accrual. For example, if you want ***Leave of Absence*** to count toward service accrual, select the check box.

Category Type

Select a **Category Type** such as ***H*** (Hire), ***O*** (Other) or ***T*** (Termination).

Category Name

Select an HR **Category Name**, such as ***CAT_LOA (Leave of Absence)***. An HR category is composed of one or more job action/reason codes. You establish HR Categories and their component **HR Action/Category** groups in the HR Action/Category page.

For example, suppose you select the category ***CAT_HIR,*** which you set up to include the action codes ***HIR (hire)*** and ***REH (rehire).*** Select the **Include/Add** check box to make both of these job action codes eligible for accrual within the Definition Name.

Date Round Option

Select the **Date Round Option** to be used for each HR Category. For example, you might round all hire and rehire dates to the first of the month. Thus, credit is accrued based on the first of the month, regardless of the date within the month the employee was hired. These options are maintained on the Date Round Option page.

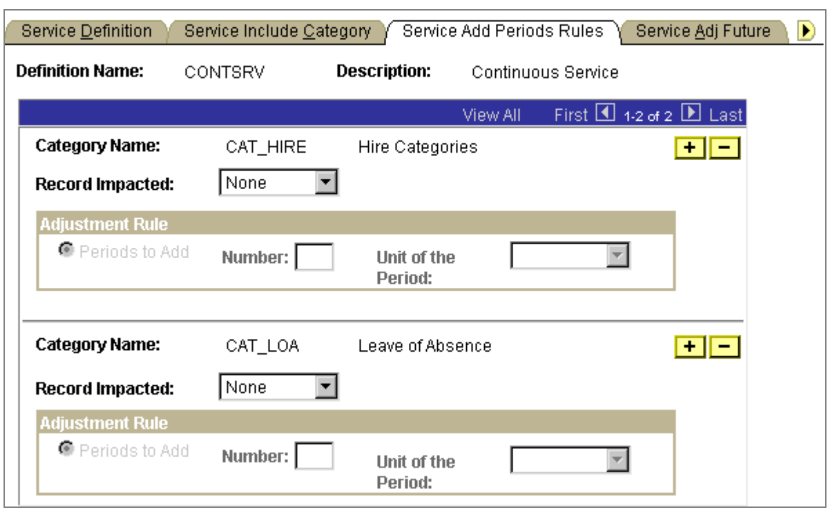
Overview of the Service Add Periods Rules Page

Use the Service Add Periods Rules page to define adjustments where the effective date of a status change moves forward and to select which employee records are affected by the parameters you set throughout the Service Rules component.

Sometimes you may want to delay the effective date of an Action/Reason event. For example, if your employee can continue to accrue service for the first month of a leave, you want to adjust the effective date of any leave action by adding a month. You do this by adding a time period to the Action/Reason effective date.

Service Rules - Service Add Periods Rules Page

Usage	Use the Service Add Periods Rules page to define adjustments where the effective date of a status change moves forward and to select which employee records are affected by the parameters you set throughout the Service Rules component.
Object Name	EG_SVC_ADD_PERIODS
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Add Periods Rules** • **Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Add Periods Rules**
Prerequisites	Service Include Category
Access Requirements	Enter a Definition Name in the search dialog box.



Service Rules - Service Add Periods Rules page

Category Name

The **Category Name** refers to the HR service category (such as ***CAT_HIR*** for ***Hire Categories***) specified on the Service Include Category page (the previous page in this group). If you entered more than one category name, use the scroll bar to add information for each category.

Record Impacted From the list of available options, select the instances in which a new status should receive an adjustment. When you add time to an Action/Reason effective date, you are giving additional service (or breaks) by delaying the impact of the change. For example, you could grant a 30-day leave of absence adjustment for only the first leave and not adjust any subsequent leaves.

Adjustment Rule

Under **Adjustment Rule**, you choose how the system applies the time adjustment you specify. When you add time to an Action/Reason effective date, you delay the impact of the change. You may not want to do this for each occurrence of the action. For example, you could grant the 30-day leave of absence adjustment only for the first leave and not adjust any subsequent leaves.

Periods to Add Select **Periods to Add** if you want to add time to an effective date. This button might become unavailable for entry depending on your **Record Impacted** selection.

Number Enter the **number** of periods to be added to the accrued service.

Unit of the Period Select the unit for the periods you are adding. For instance, if you select ***Days*** as the **Unit of the Period** and enter ***2*** in the **Number** field, the system adds two days to the effective date of the selected Category.

Add new rows if you need to set up adjustment rules for more than one **HR Category Name.**

Overview of the Service Adjustment Future Page

Use the Service Adj (Adjustment) Future page to define HR status history adjustments that depend on future changes in status.

How you treat service for a particular HR status might depend on the employee's subsequent status. For example, employees on leave might accrue service only if they later return to work. On this page, you can choose to adjust the current event based on a future event, or you can adjust a future event based on a second future event.

Adding Time to the Effective Date of a Status Change

By choosing to Add a period, you can delay an effective date based on other events occurring within defined periods of time afterward.

For example, you can direct the system to adjust the effective date of a leave of absence by one month (that is, to grant one month of extra service) only if the employee returns within four months. To do this, select A (for Add) in the Service Adjustment Type field and RFL (for Return from Leave) in the Service Adjustment Action Cd (Code) field. In the Occurs Within fields, enter 4 and M (for Months), and in the Add fields enter 1 and M (for Months).

Ignoring the Current Status Change

By choosing to Ignore Current Action/Reason, you can ignore the original HR status change based on other events occurring within defined periods of time afterward.

When you choose this adjustment, indicate the looked-for event in the Service Adjustment Action Cd (Code) fields. Indicate how far in the future to look for this event in the Occurs Within fields.

For example, you can choose to ignore a leave of absence if the employee returns within one month. To do this, select C (for Ignore Current Action/Reason) in the Service Adjustment Type field and RFL (for Return from Leave) in the Service Adjustment Action Cd (Code). field. Then select 1 and M (for Months) in the Occurs Within field.

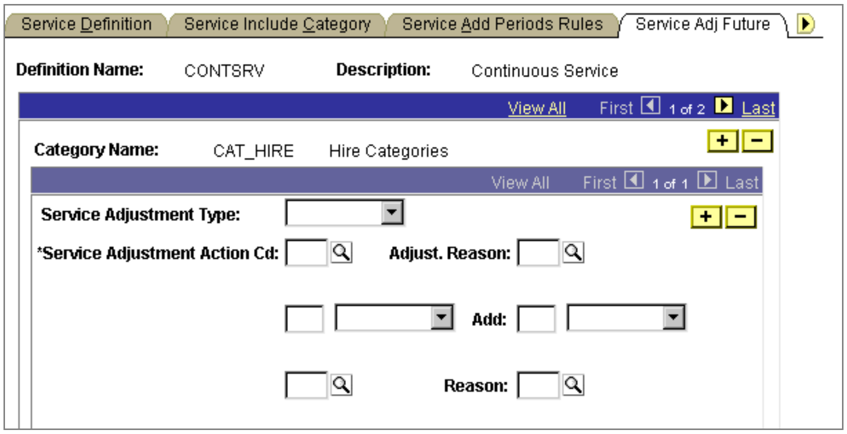
This adjustment would have the following effect:

Hire	01/01/1997	Hire	01/01/1997
Leave	05/01/1997	None	
Return	05/15/1997	Return	05/15/1997

Notice that this employee's fifteen-day leave is ignored. Because it was less than one month, the system doesn’t consider it a break in service.

Service Rules - Service Adj Future (Service Adjustment Future) Page

Usage	Use the Service Adj Future page to define HR status history adjustments that depend on future changes in status.
Object Name	EG_SVC_ADJ
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Adj Future** • **Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Adj Future**
Prerequisites	Service Include Category
Access Requirements	Enter a Definition Name in the search dialog box



Service Rules - Service Adj Future (Service Adjustment Future) page

You can enter as many service adjustments as necessary for each category using the inside scroll bar.

Service Adjustment Type

Select the **Service Adjustment Type** from the list of available options. These values are maintained on the Translate Table**.**

Some of the fields displayed beneath **Service Adjustment Type** vary, depending on the value that you enter here. You can choose from ***A - Add***, ***C - Ignore Current Action/Reason***, ***F - Ignore Future Action/Reason***, and ***I - Insert***.

Service Adjustment Action Cd (Code)

Select the type of service adjustment action, such as ***HIR (Hire),*** from the list of available options.

Adjust. Reason (Adjustment)

Select the reason for the adjustment, such as ***LTDP (Long Term Disability with Pay),*** from the list of available options.

Occurs Within

Select the time frame within which the adjustment occurs, such as ***D (Days),*** from the list of available options. This field is only displayed when a value of ***A***, ***C***, or ***F*** is entered in the **Service Adjustment Type** field.

Does Not Occur Within

Select the time frame within which the adjustment doesn't occur, such as ***D (Days),*** from the list of available options. This field is only displayed with a value of ***I*** is entered in the **Service Adjustment Type** field.

Add

Select a time period to **add** to the service adjustment. This field is only displayed when a value of ***A*** is entered in the **Service Adjustment Type** field.

Ignore Future

Select the type of service adjustment action that should be ignored in the future from the list of available options. This field is only displayed when a value of ***F*** is entered in the **Service Adjustment Type** field.

Insert
Select the type of service adjustment action that should be inserted from the list of available options. This field is only displayed when a value of ***I*** is entered in the **Service Adjustment Type** field.

Reason
Select the Action/Reason code defined in the HR Category. This field is only displayed when a value of ***I*** or ***F*** is entered in the **Service Adjustment Type** field.

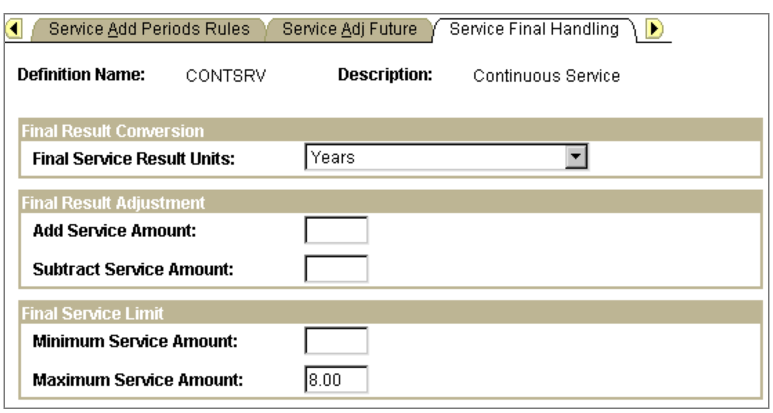
Overview of the Service Final Handling Page

Use the Service Final Handling page to set up any final adjustments to the service amount. The adjustment or service limit set up on this page applies to the total service amount for the employee.

For example, the maximum service cap for a service type may be eight years. Once you enter 8 years in the Maximum Service Amount field, the calculation process doesn't accrue more than eight years' service for the employee.

Service Rules - Service Final Handling Page

Usage	Use the Service Final Handling page to set up any final adjustments to the service amount.
Object Name	EG_SVC_FINAL_RND
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Final Handling** • **Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Final Handling**
Prerequisites	Service Definition page
Access Requirements	Enter a Definition Name in the search dialog box.



Service Rules - Service Final Handling page

Final Result Conversion

Final Service Result Units Select the calendar unit to be used in the final conversion, such as ***Y (Years).*** ***Y*** is the only valid value available for Flexible Service Tracking and Manage Faculty Events.

Final Result Adjustment

Add Service Amount Enter an amount in years to be added to the total accrued service.

Subtract Service Amount Enter an amount in years to be subtracted from the total accrued service.

Final Service Limit

Minimum Service Amount Enter the minimum amount of service required for credit for the selected **Category**.

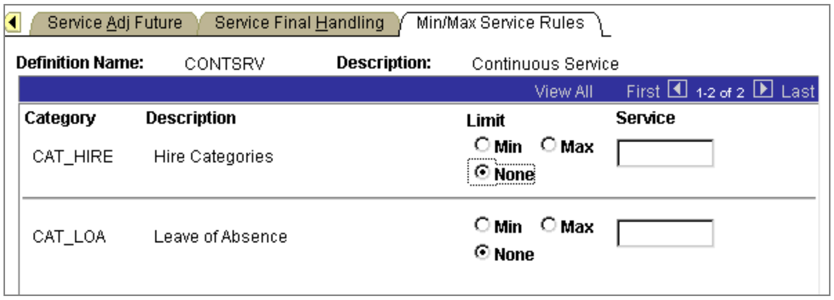
Maximum Service Amount Enter the maximum amount of service permitted for the selected **Category**.

Overview of the Min/Max Service Rules Page

Use the Min/Max Service Rules page to define adjustments limiting the number of hours or service units that can be accrued in a specific time. The Min/Max Service Rules apply to an HR Action/Category based on a calendar period.

Service Rules - Min/Max (Minimum and Maximum) Service Rules Page

Usage	Use the Min/Max Service Rules page to define adjustments limiting the number of hours or service units that can be accrued in a specific time.
Object Name	EG_SVC_MIN_MAX_SVC
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, Service Rules, Min/Max Service Rules** • **Develop Workforce, Manage Faculty Events, Setup, Service Rules, Min/Max Service Rules**
Prerequisites	Service Include Category page
Access Requirements	Enter a Definition Name in the search dialog box



Service Rules - Min/Max Service Rules page

Category The **Category** field displays the service category (such as ***CAT_HIR*** for ***Hire Categories***) defined on the Service Include Category page.

Category Description The service **Category Description** field displays service category descriptions (such as ***Hire Categories***) maintained on the Service Include Category page.

Limit Under the **Limit** column, select **Min** or **Max** to specify a minimum or maximum service limit for each **Category** listed. Select **None** if you don't want to set a limit.

Service Under the **Service** column, enter the minimum or maximum amount of service for the selected category. The **Service** field is required if you select the **Min** or **Max** radio buttons.

Use the scroll bar to display more categories and rules. To add a new row, click the **Insert Row** toolbar button.

Defining Service Calculation Groups

The calculation group provides you with a way of grouping employees who have the same calculation rules applied to their service accrual process.

On the Calculation Group page, you identify the following criteria:

- Whether to apply startup credits
- Which service types to include
- The Definition Name (service rules) to apply to each service type
- The eligibility criteria for each service type

By indicating that start-up credits apply to the calculation group, you are telling the service accrual process to include start-up credits that you have entered on the employee's Service History page.

Use the Calculation Group page to indicate which service types are included in the calculation group. You can have one or many service types associated with a calculation group. Service credit is accrued against each service type.

These service types are linked to a Definition Name. The Definition Name, in turn, stipulates which service or calculation rules are applied during the service accrual process. Each service type has its own set of service or calculation rules, based on how you set them up. The Definition Name provides a link to the service rules (the Calendar, the HR Categories, and the Date Rounding options).

The calculation group also identifies which employee types are eligible to accrue service credits within each service type.

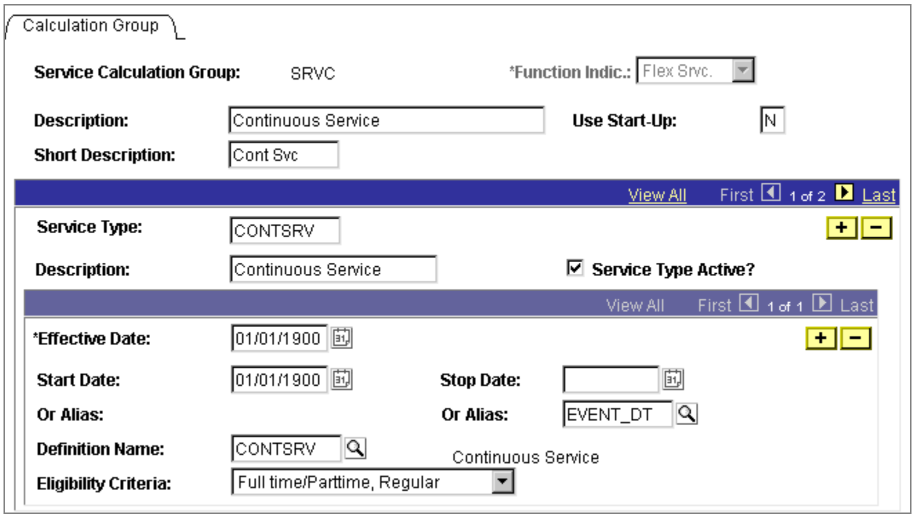
For example, a particular service type might have eligibility criteria stating that only full-time employees are qualified to accrue service credits. Another service type might include full-time and part-time employees. It is up to you to define the employee eligibility criteria for each of the service types within a calculation group.

In the case of an organization with multiple unions and bargaining units, where service calculation rules are governed by different regulations and collective agreements, you might define a calculation group based on union or bargaining units. The employees' flexible service dates would be managed by the union or bargaining unit (by setting up separate calculation groups).

The calculation groups you define are associated with employees eligible to accrue flexible service within your organization. The calculation group becomes part of the employee's employment record.

Calculation Group Page

Usage	Use the Calculation Group page to create calculation groups to group employees who have the same calculation rules applied to their service accrual process.
Object Name	EG_CALC_GRP_DFN1
Navigation	• **Administer Workforce, Administer Flexible Service, Setup, Calculation Group, Calculation Group** • **Develop Workforce, Manage Faculty Events, Setup, Calculation Group, Calculation Group**
Prerequisites	Service Rules component
Access Requirements	Enter a Service Calculation Group in the search dialog box



Calculation Group page

The following fields are common to multiple pages and are defined in PeopleBooks Standard Page Element Definitions **Description, Short Description, Effective Date.**

Service Calculation Group	**Service Calculation Group** displays the name you entered for this calculation group in the Add (if you are creating a new calculation group) or search dialog box. A calculation group name can be up to six characters.
Function Indic. (Indicator)	Select the function, or process, for which this calculation group will be used. The options are ***Flex Srvc*** and ***Tenure.***
Use Start-Up	Enter ***Y*** for ***Yes,*** if you want to include startup credits to the employee's accrued service. Startup credit is maintained on the Service Detail page for the employee. If you don't want to include prior service credits in the calculations, enter ***N*** for ***No.***
Service Type	You create **service types** on this page. A **service type** can be used by multiple calculation groups. Enter the **Service Type** you want to assign to this calculation group. To assign additional service types, press **F7** or click the **Insert Row** button to add rows.
Calc. Seq. Num. (Calculated Sequence Number)	This is a system-generated number that provides a unique key to the service type when more than one service type exists within a calculation group. This value is used by the service accrual batch process.
Service Type Active	Select this box to activate a particular Service Type for the current calculation group. If the check box is cleared for a service type, the service

type isn't included in the service accrual process.

Start Date / Or Alias

Enter a **Start Date** for this calculation group. The **Start Date** determines when the change is added to the system. The Start Date should be a valid Calendar date, not an ***Alias***.

Stop Date / Or Alias

Either enter a **Stop Date**, or choose an existing **Alias**. You must choose one or the other.

Or Alias is a critical field. When using this field, you should select the alias ***EVENT_DT,*** which links to the job history in the calculation process. The ***EVENT_DT*** Date Alias is maintained on the Database Alias page. In the case of a service calculation, the through date is used as the ***EVENT_DT.***

For more information about the Database Alias page, see Establishing a Database Alias.

Definition Name

Once you have entered a **Service Type** for this calculation group, you must indicate the service rules **Definition Name** the service type will use. This is where your Calendar links in. The **Definition Name** (maintained on the Service Rules component) dictates what calendar is used. The **Definition Name** tells the system:

- Which calendar to use
- Which date rounding and proration methods to use
- What service categories (that is, action/category code groupings) are eligible for inclusion in the service calculation process

CHAPTER 7

USF Setting Up Your Work-in-Progress Management System

Behind the scenes of your PeopleSoft Human Resources business processes are the controls that enable you to track and process personnel data in a streamlined, flexible manner. How can this control system be both pervasive and powerful, and yet, easy to modify and maintain? With PeopleSoft Human Resources, it's easy. You set up concise records for managing your work-in-progress (WIP) data to define each status type and determine how the system handles it.

You decide the process that works best for your agency, and set parameters that instruct workflow to automate your Personnel Action Request (PAR) and recruiting processes. You define the users who can access data. You set up routes that data will follow and identify who processes it. The choices are many, and you can plan a routing and approval process that's synchronous with your agency's requirements.

In your PeopleSoft Human Resources, an initial WIP management system is already set up to control your PAR and recruiting data. It's ready for your configuration. You set this system up only once to use it throughout your human resources business processes.

In this section, we discuss the sample data delivered with the system to show how it's used and what it can do. We discuss different ways to set up PAR and recruiting management. We help you ensure that actions are processed in the most efficient way. We also discuss tailoring controls to your agency's specific requirements.

In this section, you see an overview of the sample WIP management system and learn how to perform the following functions:

- Create control records that manage the sample WIP model.
- Define specific actions for employees, supervisors, and Human Resources.
- Indicate when and how users add data.
- Define allowable status changes for actions.
- Specify Workflow events.

Before You Begin

The procedures for accessing and entering information in these tables mirror those for updating any PeopleSoft table or page.

For more information and a quick refresher course, see Using PeopleSoft 8 Applications.

Remember that you can access PeopleBooks Help and review online topics that describe the purpose of these tables at any time.

Setting up your WIP control parameters is usually a one-time-only process when you first configure your PeopleSoft Human Resources system. This section is presented specifically for your agency's system administrator, who will be performing the installation setup, not for managers or users of the system.

For more information before attempting to set up the WIP Management System, see USF Administering Personnel Action Requests, USF Processing Personnel Action Requests, and Setting Up Your Manage Competencies Business Process.

We recommend that you review these sections before attempting to set up your WIP system. All of the discussions in this WIP setup section assume an understanding of the processes described in those sections. A sample WIP setup exists for PAR and recruiting in the demonstration database that was delivered with your system.

Managing Your WIP System

PeopleSoft Human Resources enables you to configure your WIP controls by setting up records that define the WIP Status codes you want to use. The WIP Status code tells the workflow system when and where to send data to the next step of the request/approval or other type of cycle. Then you associate various Status Types with each code. The Status Type tracks the request.

In this section, we focus on setting up the records for both administering and recruiting your workforce. You use two components, WIP Table Records and WIP Activity Records, to set up your WIP parameters.

Defining WIP Status Codes and Status Types in WIP Control Records

When you define your WIP Status codes, you classify the WIP processes into steps. You then use those steps to define routing and tracking in the Workflow process.

When reviewers change the WIP Status of a request, the automated 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. WIP Statuses describe the step a request is taking in the approval route.

Designing Your Agency's WIP Process

First, be sure to review the charts for processing PARs in the section called Administering Personnel Action Requests as a sample for one of the WIP setups. Next, analyze your agency's review process and determine the levels of review you need for PARs and Recruiting processes.

You can then design your own system based on your agency's requirements for routing requests and other data through approval processes. At the end of this section, Sample System Parameters, we provide sample charts showing the sample system's parameters. You may want to use this chart, change it, or use it as a template to set up your own chart in a similar format.

Defining WIP Status Codes

When you set up your WIP management system, you can choose and configure the types of status codes your agency needs. You can use all or some of the statuses delivered within the system, and, if necessary, you can use some of them more than once in a process. For example, your agency may require two levels of authorization and two levels of approval when processing a PAR.

Or, like our sample, you may choose to have two levels of authorization and one level of approval. Our sample system assigns the following WIP Status codes:

Work-In-Progress (WIP) Status	***PAR Status Code***
Initiated	INI
Requested	REQ
1st Authorized	1st
2nd Authorized	2nd
Approved	APP
Authorized	AUT
Reviewed	REV
Approved/Signed	SIG
Processed By Human Resources	PRO
Return for More Information	RET
Withdrawn	WTH
Disapproved	DIS
Corrected	COR

Canceled	CAN
IRR Reported	IRR

Defining WIP Status Types

When you're ready to choose your WIP Statuses, you link each WIP Status you've defined to a WIP Status Type. Our sample system uses five different Status Types:

WIP Status Types	***Definition***
Work-In-Progress	A request that hasn't reached the final level of approval.
Canceled	Cancels an action that had been completed.
Corrected	HR corrects a completed request.
Completed	HR approves a request that has successfully completed all review levels.
IRR Reported	A request that will be reported on an IRR.

Linking WIP Status Codes and Status Types

As we've discussed, the initial step is defining your WIP status codes according to the plan you've set up for your agency. For example, suppose for a PAR, you choose to have two first-level authorization reviews and one second-level approval review, and then send the request to HR for a final review. You define those review levels in the WIP Status code details in WIP Record Tables 1.

Then you link a Work-In-Progress Status Type for each one. This is simple: When a request is traveling along a path of approvals, you link a Status Type of Work-In-Progress until it is completed. So you assign a WIP Status Type of Work-In-Progress while PARs are being requested, reviewed by the first level reviewers, and reviewed by the second level reviewers.

You only want to change the status type to Completed after it passes all of the reviews and HR approves it. As in our example, only when you define the WIP Status as Processed by HR, will you then want the Status Type linked to Completed.

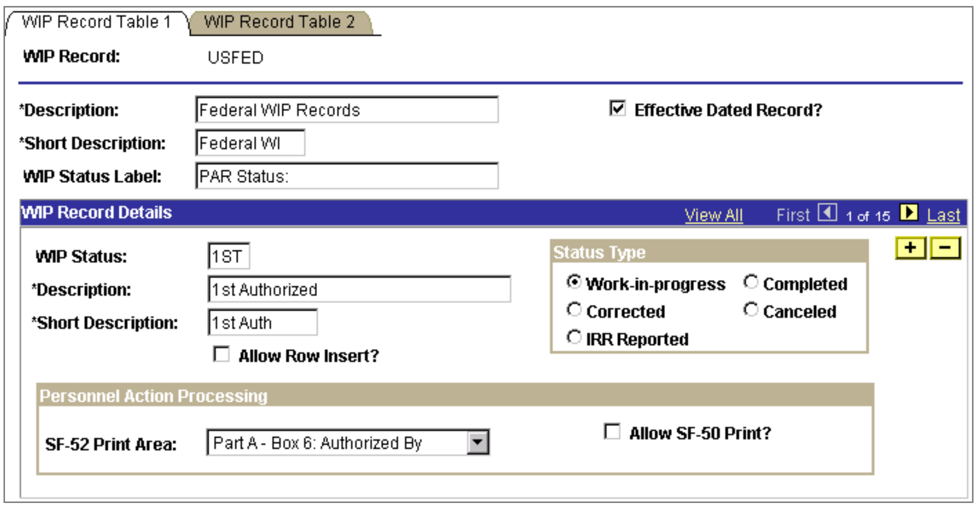
After a request has been processed, sometimes it needs to be corrected or canceled, and only HR can perform corrections or cancellations to a completed PAR. For a WIP Status of corrected or canceled, you link the Status Type of Corrected or Canceled.

Similarly, only HR can create supplemental or corrected IRRs. For PARs with a WIP Status of IRR Reported, you link the Status Type of IRR Reported.

Now that you understand the WIP Status and the Status Type, have analyzed the request process, and have determined the process your agency wants to use, you're ready to define your WIP Statuses and link each one to a Status Type.

WIP Record Table - WIP Record Table 1 Page

Usage	You set up your WIP Status Codes and then link them to Status Types in the WIP Record Tables. Use the WIP Record Table 1 to define these WIP parameters.
Object Name	GVT_WIP_RECORD1
Navigation	**Define Business Rules, Define WIP Parameters (USF), Setup, WIP Record Table, WIP Record Table 1**
Prerequisites	None.
Access Requirements	Enter a WIP Record.



WIP Record Table –WIP Record Table 1 page

Since this setup is delivered with your system, we'll explain the page controls that appear on this page as they apply to our sample database. You may change the values to correspond to the setup you require for your agency.

The WIP Record is the record for which you are setting up these parameters. The record USFED delivered with this system includes the Employee Data and Recruitment records that refer to Gvt_Pers_Data, Gvt_Job, and Gvt_Employment, and others as one record. This value shows whatever records you specified when opening this WIP Record Table component.

First, define a Description of the type of records you're setting up.

Enter a **Description;** this refers to the WIP status code record type.

Enter a **Short Description,** an abbreviation of the WIP status code record type Description you entered.

Enter a **WIP Status Label.** This is the label for referencing the WIP Status on various human resources pages. For example, when referencing the WIP Status on the Administer Workforce request pages, the label in our sample system is PAR Status.

Select the check box for **Effective Dated Record?** if the record (in this case, USFED) is to be effective-dated.

Next, describe each of the WIP Statuses you want to use and link each status to a WIP Status Type.

Identify the **WIP Status** for a step in the process, such as ***1st,*** for the first review, first level.

Now, enter the WIP Status **Description** for this status, such as ***1st Authorized.*** Enter a **Short Description** for this status, such as ***1st Auth.***

Select the **Status Type** radio button to link the Status Type to the status you are defining (1st Authorized). For this WIP Status, we've set up our link to the Status Type of ***Work-In-Progress.***

For those **WIP Status** codes and **Status Types** for which you have chosen ***Allow Row Insert From Status*** in some of the pages in the Human Resources system, the system creates a history of the changes that you can see on the pages. In the Administer Workforce request pages, for example, the Data Control page enables a user to enter a new effective-dated row.

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 users will be allowed to enter a new row. Therefore, you define the WIP Status and Status Types that enable a user to enter a new row for various pages in the system.

If you want users to be allowed to enter a new row in a record with this status, select the check box for **Allow Row Insert?** In this case, the first authorization level can only authorize existing rows, not add new ones.

In the Personnel Action Processing area, define whether and where a user may print forms from a page having this status.

Select the **SF-52 Print Area** for this status to define the area on the form where the name will appear. In our example, the name will appear in Part A, Box 6, showing the Action Authorized By.

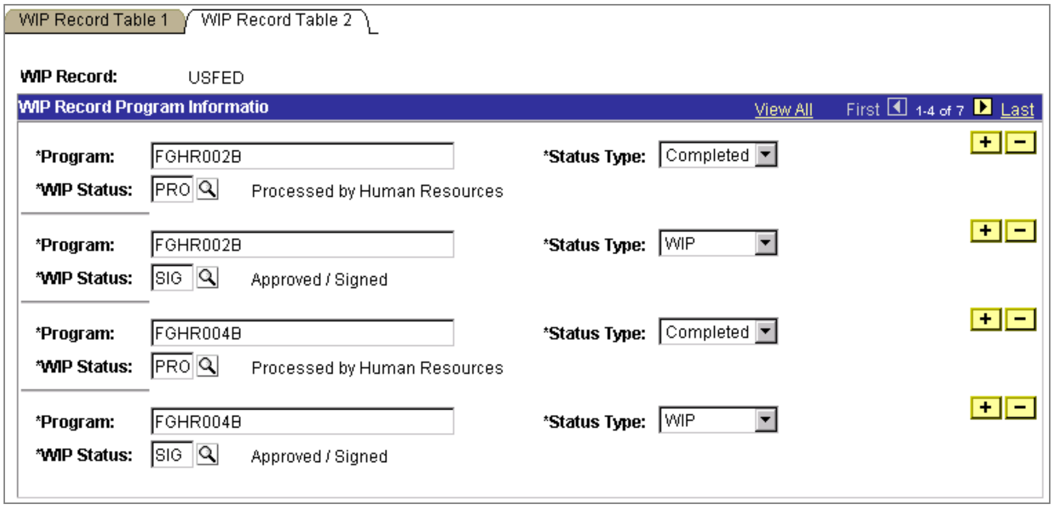
Select the **Allow SF-50 Print?** only for the status in which you will allow the SF-50 form to be printed.

To continue entering and reviewing data on this page, place your cursor in the scroll bars on the right side of a data group and click to scroll through the various entries.

WIP Record Table - WIP Record Table 2 Page

Usage	Use the WIP Record Table 2 page to identify the programs and define the data needed to support this WIP process.
Object Name	GVT_WIP_RECORD2
Navigation	**Define Business Rules, Define WIP Parameters (USF), Setup, WIP Record Table, WIP Record Table 2**
Prerequisites	Enter information on the WIP Record Table 1 page.
Access	Enter a WIP Record.

Requirements	



WIP Record Table - WIP Record Table 2 page

The **Program** is the name of the process that inserts a new row, depending on the specified Status Type. You're assigning the name of the program's SQR file, COBOL, or database agent process here, in the **Program** field.

You're also telling the system where to insert a row. It then checks the highest effective-dated row with the status type that is indicated here. The program inserts a row from the highest effective-dated row with the status type indicated here.

For example, the **Program** field in this page indicates that for FGHR002B, the system looks for a status type of ***Completed.*** Then it inserts a new row and enters the WIP Status ***PRO, Processed by HR***, as indicated in the **WIP Status** field shown here. Therefore, the **WIP Status** field designates the WIP Status that the new row will have, and the **Status Type** field designates the Status Type from which to insert.

The **Status Type** values are: ***Completed*** (the system searches for both Completed and Corrected), and ***WIP*** (the system searches for WIP, Completed, and Corrected.)

When setting up your system, you may change these or add additional Programs by placing your cursor in the **Program** field and clicking the **Insert Row** toolbar button.

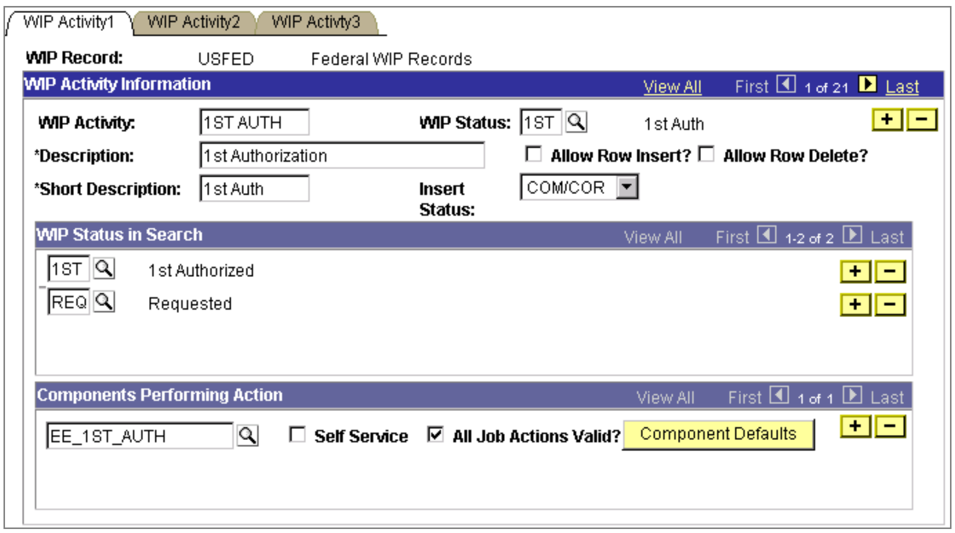
To continue entering and reviewing data on this page, place your cursor in the scroll bars on the right side of a data group and click to scroll through the various entries.

Defining WIP Activity Processes

By using the WIP Activity component, you can easily set up and manage WIP processes tailored to the way your agency functions. This way, you provide users with several different options for processing personnel actions. You use the WIP Activity 1, 2, and 3 pages to do this.

WIP Activity Table - WIP Activity 1 Page

Usage	Use the WIP Activity 1 page to link each WIP Activity to the component in which the action will be processed, specify if data rows can be inserted or deleted by each activity, and set up default values.
Object Name	GVT_WIP_ACTVTY1
Navigation	**Define Business Rules, Define WIP Parameters (USF), Setup, WIP Activity Table, WIP Activity1**
Prerequisites	You must have set up a WIP Record on the WIP Record Table.
Access Requirements	Enter a WIP Record.



WIP Activity Table - WIP Activity1 page

WIP Activity Information

WIP Activity The **WIP Activity** identifies the activity for which you are now defining controls.

WIP Status Select the default **WIP Status** for this **WIP Record**.

Description The **Description** is the description of the WIP Activity you chose.

Allow Row Insert? For effective-dated records only: Select this check box when you want to permit the user to insert rows using this **WIP Activity**.

Allow Row Delete/ For effective-dated records only: Select this check box when you want to permit the user to delete rows using this **WIP Activity**.

Short Description
The **Short Description** is the short identifier for the WIP Activity you chose.

Insert Status
Insert Status defines the WIP status codes that display when you insert a new row or when you are in Add mode. For example, when you enter a ***Hire*** **WIP Status,** you aren't inserting a row. When you request a change in benefits, you are inserting a row.

WIP Status in Search
Select the **WIP Status** codes to include in search records. The search record for the components linked to this activity only retrieves employees with rows containing a WIP Status that match what is in this table.

Components Performing Action
Select the components that the **WIP Activity** uses to perform the actions. An Activity, such as a “Request” could 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 both request like activities and could be included under the “Request” activity

Self Service
Select this check box if the component is a Self-Service component. When checked the component will automatically insert a row when it is initialized. This is like adding a new row.

All Job Actions Valid
Select this check box if the all job actions are valid for this component.

Component Defaults
Click this button to enter component defaults.

WIP Activity Table - Component Defaults Page

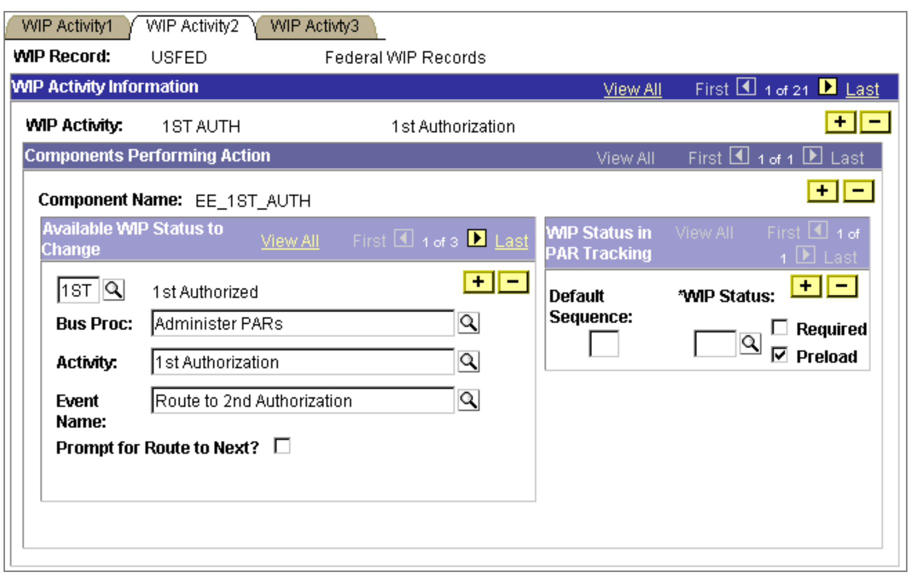
Usage	Use the Component Defaults page to set default values for the selected component.
Object Name	GVT_WIP_PGRP_SEC
Navigation	Click the Component Defaults button on the WIP Activity Table – WIP Activity 1 page.

WIP Activity Table - Component Defaults page

Action	Select the **Action** default value for this component. When the component is used, the value defaults as the action in the PAR pages. You won't be able to change the value from the PAR pages.
Reason Code	Select the **Reason Code** default value for this component when it performs this WIP Activity.
Nature of Action Code	Select the **Nature of Action Code** default value for this component when it performs this WIP Activity.
Legal Authority (1)	Select the **Legal Authority (1)** default value for this component when it performs this WIP Activity.
Legal Authority (2)	Select the **Legal Authority (2)** default value for this component when it performs this WIP Activity.

WIP Activity Table - WIP Activity 2 Page

Usage	Use the WIP Activity 2 page to indicate the actions per component for each activity.
Object Name	GVT_WIP_ACTVTY2
Navigation	**Define Business Rules, Define WIP Parameters (USF), Setup, WIP Activity Table, WIP Activity2**
Prerequisites	You must have set up a WIP Record on the WIP Record Table.
Access Requirements	Enter a WIP Record.



WIP Activity Table - WIP Activity2 page

Components Performing Action

Component Name

Displays the names of the components you entered on the WIP Activity 1 page.

Available WIP Status to Change

The statuses you specify in this group box determine what users see when they click the prompt button for the WIP Status field on the PAR pages. The user will only see the statuses that you have designated in this page.

Bus Proc (business process)

Activity Event Name

The business process, **Activity**, and **Event Name** fields are signals for Workflow. These entries govern the routing of the action through the various PeopleSoft Human Resources Business Processes in the system.

In order to modify the routings, you need to create a new Business Process Activity and Event in Applications Designer. Then you insert the name of the new process in this page and define the routing for it. The system automatically retrieves the name of the process from this table and triggers that event when the user saves the Activity with the WIP Status you have designated.

Prompt for Route to Next

Select the **Prompt for Next Route?** check box on the to specify routing prompt list views to be used on the prompt secondary page.

If you check the **Prompt for Next Route** check box, you can enter the parameters for the routing process in two new fields that appear: **Using** and **Routing Text.**

If the **Prompt for Next Route** check box is selected, a new page appears when the user clicks **Save**. On the page, the user is prompted to select from the list of employees who are in the result set of this view. The user routes the request to the employee selected by the user for the next level of approval.

The **Routing Text** is the heading that appears when the system prompts the user to specify the next routing of this 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** whose sequence you are defining.

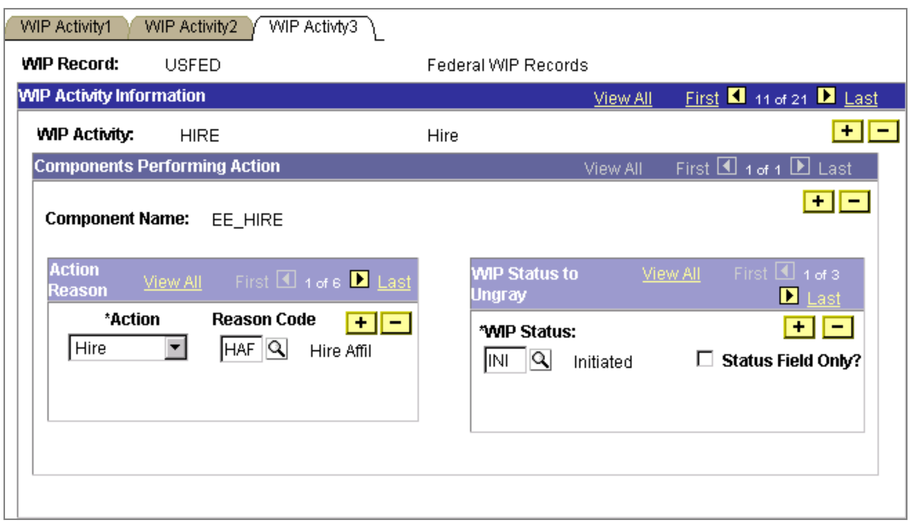
Required

Indicate if it is **Required.**

Preload Indicate of the sequence is **Preload.**

WIP Activity Table - WIP Activity 3 Page

Usage	Use the WIP Activity 3 page to make the WIP Status available for input for the selected components for these WIP Activities.
Object Name	GVT_WIP_ACTVTY3
Navigation	**Define Business Rules, Define WIP Parameters (USF), Setup, WIP Activity Table, Wip Activity3**
Prerequisites	You must have set up a WIP Record on the WIP Record Table.
Access Requirements	Enter a WIP Record.



WIP Activity Table - WIP Activity3 page

Action Reason

Action & Reason Code Enter the **Action** and the applicable **Reason Code(**s) that are valid for the identified component. These values will control what values are available from the Action / Action Reason prompts. You only see these values when administering the PAR using the component and activity.

WIP Status to Ungray

WIP Status Select the **WIP Status** you want to make available for input.

Status Field Only? Indicate if this a **Status Field Only?**

WIP Sample System Parameters Overviews

These are overviews of the sample system's Administer Workforce PAR WIP System and the Sample System WIP Status Code parameters.

Administer Workforce PAR WIP System Parameters

Our sample system assigns and uses the following WIP Status codes, PAR Status Codes, and users who access them.

Work-In-Progress (WIP) Status	***PAR Status Code***	***Who May Assign this Status***
Initiated	INI	Employee, Supervisor, Human Resources
Requested	REQ	Employee, Supervisor, Human Resources
1st Authorized	1st	1st Level Reviewer: Supervisor or Manager
2nd Authorized	2nd	1st Level Reviewer: Supervisor or Manager
Approved/Signed	SIG	2nd Level Reviewer: Supervisor or Manager
Approved	APP	Human Resources
Authorized	AUT	1st Level Reviewer: Supervisor or Manager
Reviewed	REV	2nd Level Reviewer: Supervisor or Manager
Processed by Human Resources	PRO	Human Resources
Return for More Information	RET	Supervisor, Manager, Human Resources
Withdrawn	WTH	Employee or Supervisor requesting the action
Disapproved	DIS	Supervisor, Manager, Human Resources
Corrected	COR	Human Resources
Canceled	CAN	Human Resources

IRR Reported	IRR	Human Resources

Sample System WIP Status Code Parameters

The WIP Status Types are linked to the various WIP Status Codes in the sample system as follows:

Status Types	***WIP Status Code***
Work-In-Progress	Initiated
Work-In-Progress	Requested
Work-In-Progress	1st Auth (Authorization)
Work-In-Progress	2nd Auth (Authorization)
Work-In-Progress	APP (Approved)
Work-In-Progress	AUT (Authorized)
Work-In-Progress	REV (Reviewed)
Work-In-Progress	Approved/Signed
Work-In-Progress	Returned (for more information)
Work-In-Progress	Withdrawn
Work-In-Progress	Dis (Disapproved)
Corrected	Cor (Corrected)
Canceled	Can (Cancelled)
Completed	PRO (Processed by HR)
IRR Reported	IRR (IRR Reported)

Sample System WIP Parameters Set Up

The WIP parameters are set up in the sample system as follows:

WIP Activity	***Description***	***Allow Row Delete/ Insert***	***Default WIP Status***	***Components Performing Action***	***WIP Status in Search***	***WIP Status to Ungray - Status Field Only***
1st AUTH	1st AUTH		1st	EE_1ST_AUTH	1st, Request	1st, Request - Both Status Field Only
2nd AUTH	2nd AUTH		2ND	EE_2nd_AUTH	1st, 2nd	1st, 2nd - Both Status Field Only
APP/SGN	APP/SGN			EE_APPROVAL	2nd, SIG	2nd - Status Field Only; SIG
APPL HIRE	APPL HIRE		PRO	EE_APPLICANT_HIRE	PRO	PRO, INI
APPROVE	APPROVE			GVT_VACANCY_APPR	APP, REV	REV
AUTHORIZE	AUTHORIZE			GVT_VACANCY_AUTH	AUT, REQ	REQ
CANCEL	CANCEL			EE_CANCELLATION	CAN,PRO	COR,PRO - Both Status Field Only
CONC_HR	CONC_HR		PRO	EE_CONC_HIRE		PRO, INI
CORRECTION	CORRECTION	Insert, Delete	COR	EE_CORRECTION	COR, PRO	COR, PRO

WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Components Performing Action	WIP Status in Search	WIP Status to Ungray - Status Field Only
EMPL REQST	EMPL REQST	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	HR PROC	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	IRR CORR	Insert	PRO	EE_IRR_CORR	IRR	PRO
IRR SUPP	IRR SUPP	Insert	PRO	EE_IRR_SUPP	IRR	PRO
LEAVE REQ	LEAVE REQ		REQ	FG_EE_LEAVE_REQ		REQ
PROCESS	PROCESS		PRO	GVT_VACANCY_PROC	APP, AUT, PRO, REQ, REV	APP, AUT, PRO, REQ, REV
REQUEST	REQUEST		REQ	GVT_VACANCY_RQST	INI, REQ	INI, REQ
REVIEW	REVIEW			GVT_VACANCY_RVWD	AUT, REV	AUT

WIP Activity	***Description***	***Allow Row Delete/ Insert***	***Default WIP Status***	***Components Performing Action***	***WIP Status in Search***	***WIP Status to Ungray - Status Field Only***
SUP REQST	SUP REQST	Insert	REQ	EE_SUP_RE Q	PRO, INI, REQ	INI, REQ
TERMI NATN	TERMINA TN	Insert	REQ	FG_EE_TER MINATION		REQ
W3_PE RS_DT	W3_PERS_ DT		PRO	W3_GVT_P ERS_DATA	PRO	PRO, REQ

CHAPTER 8

Administering Security

Online security is a critical issue in any organization. Because most employee data in PeopleSoft Human Resources applications is confidential and sensitive, you want to be able to designate exactly what users are able to see. For example, you might want managers to have access only to data for employees in their own departments. Or, you might want regional managers to manage data for employees in the offices that report to them, but not offices in other regions.

There are two ways to control access to your PeopleSoft system. You can control what users see (menus, components, pages, etc) and you can control who they can see (employee data). With the exception of Manager self-service transaction security, this chapter discusses how to control whose HR data your users will be able to access. For information on controlling access to menus, components, pages, etc., please refer to the Security PeopleTools PeopleBook.

All PeopleSoft Security is determined by permission lists and roles. Access to menus, components, pages, and global functionality, among other information, is assigned to permission lists, which in turn, are assigned to roles (although some permission lists are assigned directly to the user). Roles are then assigned to the user. Security for PeopleSoft Human Resources is concerned with employee data access (data permission) and access to local country functionality on global HRMS components.

PeopleSoft Human Resources is delivered ready for you to set up departmental security. To grant data permission, you use a security tree to set up a security hierarchy. Once you establish your security tree, you use that structure to grant and deny access to organizational entities to Data Permission Lists. Data Permission Lists are assigned to users on the User Profile - General page. To learn how to grant data permission, see the following discussions in this section:

- Building and Modifying Security Trees describes how to set up a security tree and use it to grant and deny access to employee data.
- Linking Your Tree With Row Level Security explains how to assign data access to Data Permission Lists using the security structure information you set up in the security tree.

You can further improve the performance of data retrieval by using Security Fast Views. Fast views load the information you set up in the security tree, along with employee Job data if you so choose, into a single, pre-indexed table. This greatly reduces the amount of time it takes the system to retrieve data. To learn how to use Security Fast Views, see the following discussion in this section:

Creating Fast Security Views in PeopleSoft HRMS describes how to make data retrieval more efficient using fast security views.

You must periodically update your Security Tree and Security Fast Views so that they are based on the most up-to-date information. To learn how to update Security Trees and Security Fast Views, see the following discussion in this section:

Updating Data Access Profiles and Fast Views describes how to update your security tree and fast view tables as your data changes.

Setting up Security for Applicant Data outlines how to control your human resources and hiring managers' access to applicant information.

See the Setting up Security for Applicant Data section describes how to grant access to local functionality on global HRMS components. To grant permission to local functionality on global HRMS components, you grant country access to Primary Permission Lists using the Maintain Global Security – Global Panels Page.

Security for PeopleSoft HRMS's self-service transactions is described in Self-Service Transactions Security.

For more information about PeopleSoft Security, see Security. For more information about security for Variable Compensation, see Overview of Managing Tree Security.

Understanding Data Permission Security

Data Permission security is one part of your overall PeopleSoft Security setup. Data Permission security, or row-level security, refers to controlling access to your employees' data on an individual basis. Employee data is the area of security that most concerns HRMS because it involves maintaining the confidentiality of your employees' data.

In this section we discuss employee level data security. In some applications you might also store sensitive data for non-employee payees. Employee-level data security doesn't apply to non-employee payee data, with the exception of pension payee non-employees. Pension Administration non-employees (beneficiaries and QDRO alternate payees) are established in the system as if they were employees, complete with employee IDs and Job data, such as a department.

At a high level, data permission security works by associating an employee's data with a DeptID. Using Security Trees, you grant Data Permission Lists access to certain DeptIDs, which in turn gives access to the data of the employees in that department. Users are then assigned a Data Permission List. When the user logs in to the system, their Data Permission List identifies which departments' employee data to which they can have access.

Security Trees

Using PeopleSoft Tree Manager, you create a security tree representing your organization's security hierarchy. Security trees enable you to grant (or deny) access to an employee's data by granting access to the entity to which they report. To grant access to a group of entities, you can grant access to the entity to which they all report. This makes granting security access quick and simple. You can restrict access to individual entities or a group of entities, as need be.

For example, the Los Angeles, San Francisco, Seattle, and Portland offices report to the Western United States region, which reports to the American Corporate Office. Most people who require access to employee data from one western office will likely require access to employee data from all four offices. Rather than granting a Data Permission List access to each office separately, you only need to grant access to the Western United States region entity.

You can also restrict access to one of the branch entities. Should one permission list only require access to the San Francisco, Los Angeles, and Portland office, you still grant access to the Western United States region, but deny access to the Seattle office.

Data Permission Lists

Entity access is granted to Data Permission Lists rather than individual users, because you often have groups of employees who require access to the same employee data. Using the above example, if you grant access to the Western United States region to the WEST Data Permission List, you can then assign the WEST Data Permission List to the three HR clerks, two payroll clerks, and one training administrator covering the western region. In addition, if you adjust the Data Permission List, the employee data access for those six employees also change, reducing your user access maintenance.

For more information about assigning a Data Permission List to a user, see Security.

How Does Data Permission Security Work?

To understand how PeopleTools enables employee data security, it first helps to understand how the system retrieves data when you access a page or component.

To open a page or component in PeopleSoft HRMS, select a page from the menu; the system displays a search page. The page represents the search record, and the fields displayed are the search keys and alternate key fields that uniquely identify each row of data. The system uses the information you enter in the key or alternate key fields to select the rows of data 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.

For a complete list of HRMS search views, see Search Views in PeopleSoft HRMS .

The system also uses search records to enforce data permission security. In addition to the key and alternate key fields that you see in the search page, search views for components containing sensitive employee data also contain the Data Permission List (ROWSECCLASS) as a key field. The user's Data Permission List is added to the SQL Select Statement along with the values that the user entered in the search page. The system then retrieves the employee data that matches both the criteria from the search page and the user's Data Permission List. The system doesn't retrieve data for those employees to whom you haven't granted data access. Using the above example, if you enter Smith in the Name alternate key field, the system only retrieves the employee data of the employees with the name of Smith to whom you have access.

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

A component can only have one search record. If you want to associate more than one search record with a component (for example, data level security for some users and no Data for others), you need to reinstall the component on a different menus, one for each search record. You can then grant access to the appropriate component.

For detailed information on search records, changing search records, and granting access to components, see PeopleSoft Application Designer.

Understanding HRMS Security Types

Data permission security enables you to grant and restrict access to employee-level data using security trees and row data permission lists. Data permission security is enforced using security search views to access employee data. PeopleSoft delivers three ways to implement data permission security:

- Departmental Security
- No Security
- International Security (a configuration option)

Although PeopleSoft currently delivers its HRMS applications with Departmental Security implemented for all of its security views, we also enable you to automatically switch from Department Security to No Security using the Change Row Security Basis process. In this section, we describe the three types of security available to you and the steps required to implement the different security types.

Although we refer to three types of security in this topic, PeopleSoft HRMS enables you to create many modifications within these basic security types. We describe these modifications elsewhere in this section.

For more information on the different security modifications you can create in PeopleSoft HRMS, see Building and Modifying Security Trees.

Choosing a Security Type

Because row-level security in PeopleSoft HRMS comes in three different types, it is important that you understand the differences between the kinds of security available to you to determine which form of security best meets your needs.

Departmental Security	Departmental Security is the default security delivered with PeopleSoft HRMS. With Departmental Security, users are granted or denied access to employee data, based on the organizational hierarchy you define in the security tree. When you grant users access to a given DeptID on the security tree, you automatically grant them access to employee data in any department that reports directly or indirectly to that DeptID, unless you selectively restrict access to a specific one. When you use Departmental Security, you grant and deny access to employee data using row-level permission lists. Users are assigned a row-level permission list granting them access to certain departments' data.
No Security	All users have access to all departments and employees.

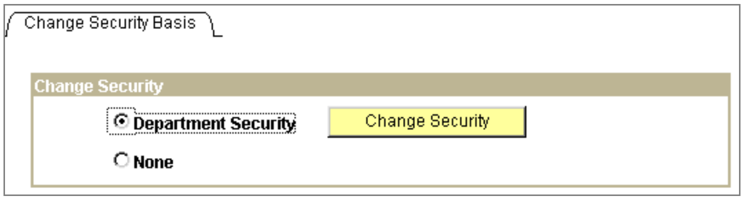
International Security	This is a configuration option. HR administrators in one country might not have access to the records of employees in another country. Normally, this is not a problem, but if (for example) a US employee is on assignment in France, the US HR administrator may require access to that employee's French job data in addition to the American job data. To implement this configuration, you will need to use the Application Designer to replace the SQL objects in the SQL viewtext for those search views you want to use international security. You will then need to recreate the view with the new SQL objects. The following is a list of the available International Security SQL objects that you can use to replace the standard SQL objects used in the security search views: • HRSECVIEW_I_FROM • HRSECVIEWS_I_JOB • HRSECVIEWS_I_JOBFROM • HRSECVIEWS_I_SELECT • HRSECVIEWS_I_WHERE • HRSECVIEWS_I_WHEREB For more information about the Application Designer, see Application Designer

The security type you choose for your system ultimately depends on the way you define employee assignments, the way you organize employee records, and the level of confidentiality you need to maintain.

Change Row Security Basis Page

Usage	Use the Change Row Security Basis page to switch between Departmental Security and None for your data permission security type. Departmental Security is the default security type for PeopleSoft HRMS.
Object Name	CHG_SECURITY
Navigation	**Define Business Rules, Define General Options, Process, Change Row Security Basis, Change Security Basis**

Prerequisites	None.
Access Requirements	Enter a Run Control ID in the search dialog box.



Change Row Security Basis page

Department Security

Select **Department Security** if you want to control user access to employee data based on the departmental hierarchy in the security tree. Departmental Security is the default security type for PeopleSoft HRMS.

None

Select **None** if you don't want to restrict user access to employee data. When you change your security type to **None**, users will be able to view the data of each employee. You will still be able to restrict user access to menus, components, and pages.

Click this button to change the security type from the existing security type to the one (either **Departmental Security** or **None**) you selected.

Important! Changing security has wide implications throughout the system. You will only run this process when you first implement security or when you are doing a major restructuring of your system.

Building and Modifying Security Trees

We recommend that you review your PeopleTools Tree Manager documentation for a full, detailed discussion on using the PeopleSoft Tree Manager before you attempt to modify or create your own Security Trees. This section discusses using the Tree Manager to define and maintain Security Trees in PeopleSoft HRMS and is by no means an exhaustive or even thorough discussion on the use of the Tree Manager. Security is a very important component of your system, and it is crucial that you fully understand all aspects of PeopleSoft security and the tools it uses before implementing it.

The PeopleSoft Tree Manager offers you a powerful visual means to build a hierarchy of security for your organization. A security tree gives a quick, graphic means to grant and restrict access to data. The security tree doesn't have to represent your organization's hierarchy exactly, although it will probably be very close.

For the purpose of building security trees, we define all entities in an organization--from companies to departments--as departments. The department data is created and stored in the Department Table, which you can access from the Tree Manager or the Managing Human Resources menu. You assign security access based on these departments, so you must define each entity in your organization on the Department Table so that they have a department ID code that can be added to the security tree.

Trees are built with levels and nodes. Levels are the levels of the hierarchy. Nodes, which represent departments, are added at different levels, indicating their place in the hierarchy. For example, the first level of your tree could be the Company level. Your second level could be the Regional level. A node added at the first level is a Company-level node and represents the Company department. A node 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 you create. If you grant access to a department, you also grant access to each department that reports up to that department. For example, if you grant access to your Technology department, you also grant access to each department that reports up to it. You can restrict access to any departments subordinate to the Technology department, if required.

This section describes how to build a security tree, either manually or using an existing organizational structure; maintain and modify existing security trees; link your security tree with role and permission list security; and finally, grant user access to departments.

See Creating a New Security Tree Manually , if you are building your security tree manually.

See Loading Your Security Tree Automatically , if you are building your security tree automatically using an existing organizational structure from another system.

See Modifying Your Security Trees for information on maintaining and modifying your security tree.

See Linking Your Tree With Row Level Security for information on how to link your tree with data security.

See Linking Your Tree With Row Level Security to learn how to use your completed security tree to grant and restrict user access to departments.

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

For more information about setting up the control tables in PeopleSoft HRMS, see Setting Up Control Tables.

Security Versus Organizational Structures

Though you use your organizational structure as the foundation for building your employee data security structure, the two structures aren't–and shouldn't be–the same. The primary difference between them is that you continue to maintain inactive departments in your current security structure. You need to do this so that users can retrieve data for employees associated with the inactive departments. While inactive departments don't appear on your organizational structure chart, they do need to appear on your security tree; otherwise, you could have employee data that no one can access.

Unlike an organization chart, a security tree has the following characteristics:

- Only one security tree per SetID can be in effect at a time. As a result, historical security is irrelevant.
- Inactive departments must always appear on security trees. Otherwise, data for retired, terminated, or transferred employees who used to be in defunct departments will disappear.

If you want to use trees for reporting purposes that accurately reflect your organizational chart at a particular point in time, don't use your security tree. Instead, create a separate organizational tree.

For more information about creating organizational structures using Tree Manager, see Tree Manager.

Tree Terminology

Before you begin creating a security tree you should familiarize yourself with the terms used with the Tree Manager.

Level	A logical division in the tree hierarchy. Examples include department, branch, region, or company. You can create as many levels on a tree as you need to define your hierarchy, or choose not to use levels at all. Regardless of level, each entity on the tree is defined as a department.
Node	An individual branch representing an organizational entity (department) on a tree.
Parent	A node that has other nodes reporting to it. Parent nodes are divided into child nodes.
Sibling	Nodes at the same level that are subsets of the same parent node.
Child	A node that is a subset of a parent node.

Creating a New Security Tree Manually

There are four steps to creating a new security tree. You complete these steps using PeopleSoft Tree Manager. To access the Tree Manager, logon to the PeopleTools windows client and select **Tree Manager** from the application window.

Defining Your Tree Structure

PeopleSoft delivers the Tree Structure Table with the tree structure for employee data security already defined. The tree structure identifies the menus, pages, records, and fields in PeopleSoft HRMS that you access or update while building your tree. You should use this same structure for any additional security trees you create. Unless you are modifying the system extensively, you rarely change this information.

To review the Tree Structure Table:

1. Select **Structure, Open.** The system displays the Structure ID page.

2. Select DEPARTMENT and click **Open**.

Defining Your Security Tree

Before you can insert levels and nodes into your security tree, you must define a number of important characteristics for your tree, including the database keys--the fields that uniquely identify each tree. You can have multiple trees active at any one time, but they must each have a different SetID.

3. To open the Tree Definition page for a new tree definition, select **File, New.** The system displays the New Tree Definition component.

4. In the Structure page, enter the following information:

   a. Enter DEPARTMENT in the **Structure ID** field.

   b. Enter a **SetID** for the security tree. You can have multiple security trees active at the same time, but you can have only one active security tree for each SetID. **SetIDs** also determine which departments can be added to the security tree. Only departments with this **SetID** can be added.

For more information about **SetIDs,** see Regulating HRMS System Data.

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   c. You must enter DEPT_SECURITY as the **Tree Name** to link your security tree with security later on.

   d. Enter the security tree's **Effective Date**. You can create a number of versions of this security tree with different effective dates, but only one can be active at any time. Only levels and departments with effective dates equal to or less than this **effective date** are available for use in this security tree.

e. Enter a tree definition **Description.**

f. Enter a tree structure **Category.**

5. In the Properties page, enter the following information:

g. In the **Status** field, indicate if the security tree is ***Active*** or ***Inactive***.

h. Leave the **All Detail Values in This Tree** check box clear. Security trees don't require detail values.

i. Leave the **Allow Duplicate Detail Values** check box clear. Security trees don't require detail values.

6. In the Levels page, enter the following information:

j. In the **Use of Levels** field, select the most appropriate option for your security tree.

Select ***Strictly Enforced,*** if your levels consist of only one type of entity. For example, only regions report to the Company Level and only divisions report to regions.

Select ***Loosely Enforced,*** if the entities combine different types of entities. For example, both regions and divisions report to the Company Level.

Select ***Not Used,*** if your security structure is very flat and you don't need to set up groupings of units in levels.

For more information about tree levels, see Tree Manager.

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7. You don't need to change the default information in the Access Performance Methods page.

8. Once you have completed your tree definition, click **OK.** The system opens the Tree Manager window where the **Tree Name** and the **Effective Date** of the tree display in the title bar.

Adding Levels

Once you define your tree, you can add the levels that represent a security hierarchy. Levels help determine how nodes (departments) are organized on a tree. Level descriptions are stored in the Tree Level table.

If levels already exist, highlight the level above the point where you want to insert your new level and click on the **Add** button. Each level is added after the currently highlighted level.

9. To add or edit level information, open your tree and select **Edit, Levels**. The system opens the Edit Level Information page.

10. To add a level, click **Add.** To edit information about the level, click **User Data.** To change the name of a level, click **Tree Data.**

When you click **Add,** the system opens the Tree Level page.

11. To add levels on the Tree Level page, enter the following information.

k. Enter a name for the new level in the **Level Name** field.

l. Select the **All Values** check box to ensure that all nodes at lower levels report to this level. Leave the check box clear to enable nodes to skip this level and report to a higher level. You want to leave this check box clear if some of your departments report directly to the top level and not any of the intermediate levels.

This check box is unavailable for entry when you're adding the first level (top level) for this security tree. In this case, the check box becomes irrelevant because there aren't any levels above the top level.

m. Click **OK** when you're done.

12. The system displays the level description panel. Enter the following information on the tree level description panel:

n. Enter the date the level becomes effective in the **Effective Date** field. This date must be earlier or equal to the security tree date in order to be available for use in that tree.

o. Select the **Status** of the new level.

p. Enter a **Description** of the level. If this **Level Name** has been used in other trees, the **Description** field defaults to the description already specified for this level. Changing the description here affects all trees using this level.

q. Enter a **Short Description** of the level.

Inserting Nodes

In a security tree, each node represents a business entity in your organization. The first node in your security tree is known as the root node and is the highest level in the security hierarchy. You define nodes on the Department Table, creating a department for each business entity in your organization. You can access the Department Table through the Tree Manager (on the Windows client) or through the Manage Human Resources menu (on the PeopleSoft Internet Architecture). You can add nodes to your security trees by using the edit menu or using the Tools buttons. You must insert the root node using the Edit menu.

To insert nodes in your security tree:

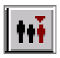
13. Insert the root node.

To insert the root node, select the security tree node (it will be labeled with the SetID and Effective Date). Select **Edit, Insert, Node**. Because this is the first node, it can't be a sibling or a child. In addition, the system doesn't allow you to insert a sibling for your root node. The system displays the Tree Node page.

14. Enter additional nodes using the Edit menu or the Tools buttons.

To enter additional nodes using the Edit menu, highlight a node at the level or the level above where you want to define a node, then select **Edit, Insert**. You can select to insert a **Child** or a **Sibling**.

To enter additional nodes using the Tools buttons, highlight a node at the level or the level above where you want to define a node, then click one of the following buttons:



Click this button to insert a child node.

Click this button to insert a sibling node.

When you opt to insert a sibling, you are entering a node that is at the same level as the node you highlighted. When you opt to insert a child, you are inserting a node one level down from the node you highlighted.

When you insert a child or sibling node using the Edit menu or the Tools buttons, the system displays the Tree Node page.

15. Enter the following information in the Tree Node page:

r. Enter the Department ID for the department node you are adding in the **Tree Node** field. Nodes represent departments, so the **Tree Node** names are Department IDs.

If you are adding a department that has already been defined in the Department Table, enter the DeptID in the **Tree Node** field.

If you are adding a new department you can enter a department ID in the **Tree Node** field or set up the system so that it auto-numbers departments as you add them. When you add a new department on the Tree Node page, the system displays the Windows client Department Table component so you can define the department. You can also access the Department Table from the Manage Human Resources menu on the PeopleSoft Internet Architecture.

For more information about setting up auto numbering for departments, see PeopleSoft Application Designer.

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s. If your use of levels is loosely enforced, the **Level Name** field is available for entry and you can enter the **Level Name** for this node.

If you have defined your security tree with strictly enforced levels, the Tree Manager automatically assigns the node its appropriate **Level Name** and makes this field unavailable for entry.

t. Click **OK** when you have finished entering tree node information. If you have added a node for an existing department, the system adds the node to the security tree. If you have added a new department, the system adds this department's node to the security tree when you save the new department.

Cross Checking Departments

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

This report is run outside of PeopleSoft applications using SQR Writer.

For more information about using the SQR Writer, see Introduction to PeopleSoft Reporting.

Loading Your Security Tree Automatically

You can create a security tree using an existing organizational structure. Use the SQR processes discussed below 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 your security tree.

For more information about SQR Report Writer, see Introduction to PeopleSoft Reporting.

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

16. Import entity data.

To begin the conversion process, import entity data into R_PER507 using the PeopleSoft Import Utility, an 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 using the REPORTS_TO_DEPT field in the R_PER507 temporary table. R_PER507 is included with the system and looks like DEPT_TBL, but includes the following additional columns:

New Column	***Description***
SETID_RPDEPT	Specifies the SetID of the department a given department reports to. In addition to the other Department Table data, you must load data into the SETID_RPDEPT column.
REPORTS_TO_DEPT	Specifies department to which a given department reports. In addition to the other Department Table data, you must load data into the REPORTS_TO_DEPT column.

New Column	***Description***
ORGCODEFLAG	Indicates whether department will be selected for processing as of a particular date. The system will populate this column based on your department data and REPORTS_TO_DEPT values.
ORGCODE	Designates the position of department in hierarchy. The system will populate this column based on your department data and REPORTS_TO_DEPT 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.

For more information about the PeopleSoft Import Manager, see Import Manager.

17. Set up the reporting hierarchy.

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

For more information on running this SQR, see Introduction to PeopleSoft Reporting.

18. Build your department security tree.

Next, run PER508 to build your DEPT_SECURITY tree automatically. The effective date of the tree is the latest effective date of all departments processed in step 2.

If you want to set up multiple trees to represent security or organizational structures at different points in time, you must perform Step 2 for each tree, setting the As of Date each time, and then perform Step 3 again.

19. Transfer department data into the department table.

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

20. 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.

For more information on running this SQR, see Introduction to PeopleSoft Reporting.

Cross Checking Departments

After you build your security tree, we recommend that you run an audit (PER506.SQR) to determine which Department IDs are in the Department Table, but not in the security tree, and which IDs are in the security tree, but not the Department Table. You will not be able to implement departmental security for the new departments before you add them to your security tree. This SQR audit ensures that you add each department in your system to the security tree.

For more information on running this SQR, see Introduction to PeopleSoft Reporting.

Modifying Your Security Trees

You can modify an existing tree by making changes either to the nodes or levels. When you modify your security tree, the tree node numbers will likely change and you will need to refresh the numbers. You will also need to run the Security Administration process to update the data access profiles and Fast Views, if you are using them.

Editing Levels

To edit information about the levels, use the Edit Level Information box described in Adding Levels. Click **User Data** to edit information about a level. To change the name of a level, click **Tree Data.**

Editing Nodes

You can edit department data at any time by selecting a node and then selecting **Edit, Data** or by double clicking the node. The system opens the Department Table in the Windows client (the Tree Manager isn’t accessible through the Internet client).

Moving Nodes to Different Levels

Once you've added nodes to your security tree, you can move them around by cutting and pasting (using the Edit menu or the Tools buttons) or by dragging the nodes using your mouse. If your tree has Loosely Enforced Levels or No Levels, you can still move nodes indiscriminately, allowing nodes at several levels from the top to report directly to the root node. However, in trees with Strictly Enforced Levels, nodes must continue to report to nodes one level up.

Adding Nodes to an Existing Security Tree

You can add nodes to an existing security tree using the steps outlined in Inserting Nodes.

You must add nodes to your security tree for each department you add to your system or you won't be able to implement departmental security for the new departments.

Renumbering Numbered Gaps in Your Security Tree

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 the tree. When you move a node, the system renumbers those nodes to the right of the one you moved (the children of the node you moved). When you save changes to a tree, the system saves only those portions of the tree that have changed.

To refresh the unused numbers in the gaps between nodes, you'll have to run the PTUGAPTR.SQR utility. You refresh the unused numbers under these circumstances when:

- You load your security tree structure automatically.
- You modify your security tree.
- You encounter an online error instructing you to gap your tree.

For more information on running this SQR, see Introduction to PeopleSoft Reporting.

Linking Your Tree With Row Level Security

Once you set up your security tree, you must run a process from the Security Administration page updating row-level security so that the system recognizes the current effective date of your security tree. Your security rules then correspond with that date, and you or your system administrator can use the Data Security Profiles page to grant or deny access to departments.

You need to update row level security using the Security Administration page in these situations:

- You create your security tree.
- You reorganize your security tree.
- You want to use a tree with a different effective date.

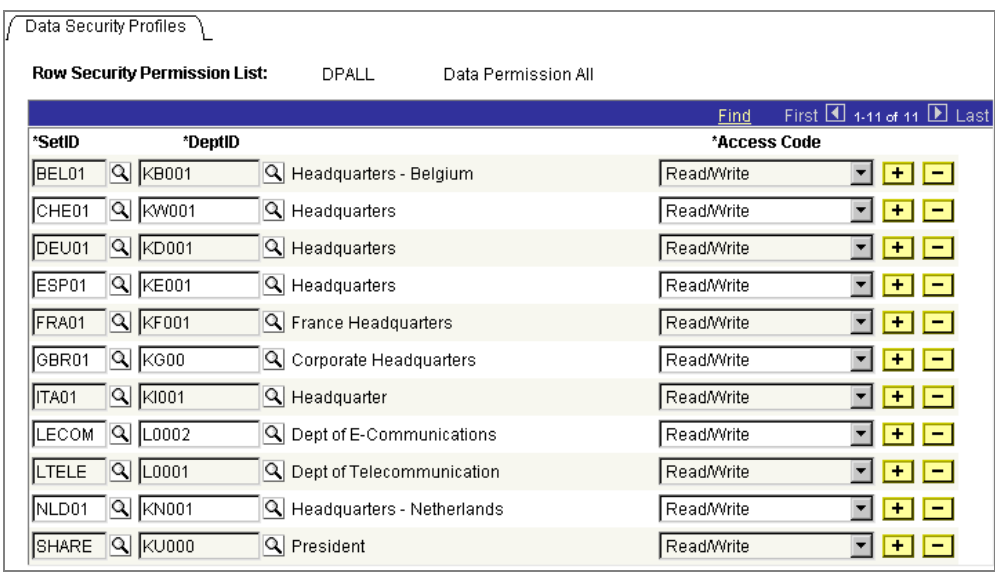
You should only update data security on the date the new tree takes effect, not before. The system uses whichever trees have the date closest to (not greater than) the date you enter when you run the security administration utility. You should always perform this step when you're ready to use the new trees.

Assigning Department Access to Data Permission Lists

After you create your security tree (either manually or automatically) and linked it with row level security, you are ready to use the Data Security Profiles page to grant department access to Data permission lists.

Data Security Profiles Page

Usage	Use the Data Security Profile page to grant department data access to Data Permission Lists.
Object Name	SCRTY_TABL_DEPT
Navigation	**Define Business Rules, Administer HR System, Use, Maintain Row Level Security, Data Security Profiles**
Prerequisites	Each Department ID to which you are granting access on this page must have a node on an active security tree. You must have run the Security Administration process with the Update Security check box selected at least once.
Access Requirements	Enter a Row Security Permission List. The HRMS naming convention for data permission lists is DPXXXXX. This component can only be accessed for Row Security Permission Lists beginning with DP.



Data Security Profiles

Row Security Permission List: DPALL Data Permission All

Find First 1-11 of 11 Last

*SetID	*DeptID		*Access Code
BEL01	KB001	Headquarters - Belgium	Read/Write
CHE01	KW001	Headquarters	Read/Write
DEU01	KD001	Headquarters	Read/Write
ESP01	KE001	Headquarters	Read/Write
FRA01	KF001	France Headquarters	Read/Write
GBR01	KG00	Corporate Headquarters	Read/Write
ITA01	KI001	Headquarter	Read/Write
LECOM	L0002	Dept of E-Communications	Read/Write
LTELE	L0001	Dept of Telecommunication	Read/Write
NLD01	KN001	Headquarters - Netherlands	Read/Write
SHARE	KU000	President	Read/Write

Data Security Profiles page

SetID Enter the **SetID** of the department to which you are granting access.

DeptID

Enter the **DeptID** of the department to which you are granting access. The Row Security Permission List has access to each **DeptID** that reports up to this one on the Security Tree, unless you specify otherwise; so you don't have to select each **DeptID** individually. For example, if DeptIDs 510, 540, and 570 all report to DeptID 500, you only have to select DeptID 500 on this page to grant this Row Security Permission List access to all four departments.

To restrict access to one or more departments that report up to a **DeptID** to which you've granted access, insert a row and select the restricted department's **DeptID**. Using our example from above, if you want the permission list to have access only to DeptIDs 500, 510, and 570, you first grant access to **DeptID** 500. You would then insert a second row and restrict access to **DeptID** 540.

In a third scenario, you may want to grant access to a level-three entity, not to a level-four entity, but to a level-five entity that reports to the level-four entity. You can do that: Simply grant access to the level-three entity, deny access to the one level-four entity, and then grant access to the level-five entity.

You only need to restrict access explicitly for **DeptIDs** that report up to a **DeptID** to which you want to grant access. Otherwise, the Row Security Permission List won't have access to a **DeptID** unless it, or the **DeptID** to which it reports, has been granted access on this page.

Access Code

Indicate what kind of access the Row Security Permission List has to the data of this **DeptID**.

Creating Fast Security Views in PeopleSoft HRMS

As explained in Understanding Row Level Employee Data Security, the system uses search views to enforce security. The system only retrieves employee data rows to which the user's Data Permission List grants them access. The system needs to search through several different tables to find the security tree and job data information it needs. This can be slow when you have a large number of records in your system. Fast views can be substituted for the delivered security search views to provide faster search results.

Fast views load security tree and job data information into a pre-indexed table. When you open a component and enter information into the search page, the system uses the fast views to retrieve the data from that table. The index makes the search more efficient, so the data is retrieved much faster.

The drawback is that the data in the tables is static. That is, changes made to records throughout the day aren't reflected in the records in the tables; so when you retrieve a record using fast views, you aren't necessarily looking at the most recent data. You must periodically refresh the tables in order to be current.

In this section, we discuss the Fast View options available to you, the setup elements, and the steps required to implement these optional views. As delivered, only components that have PERS_SRCH_GBL or EMPLMT_SRCH_GBL as search records can be assigned a fast view.

Understanding the Types of PeopleSoft HRMS Fast Security Views

PeopleSoft delivers three different Fast View Tables, which are based on different views. Which one you use depends on your needs.

Fast View Table 1

When you use Fast View Table 1, you load a pre-indexed table (FAST_SCRTY_1) with your security tree information matched with the content of your job data record. Because this application makes so much data available on a single pre-indexed table, system performance is greatly enhanced. However, you also need to refresh this table regularly to ensure that your users are working with the most recent employee data.

The following table lists the default global security views in PeopleSoft HRMS, and the appropriate Fast View Table 1 replacement view.

Default Search View	***Fast Views***	***Based on Table:***
PERS_SRCH_GBL	FAST_PERSGL_VW1	FAST_SCRTY_1
EMPLMT_SRCH_GBL	FAST_EMPGL_VW1 FAST_EMPADD_VW1 (used when the component is entered in Add mode).	FAST_SCRTY_1

Fast View Table 2

When you use Fast View Table 2, you load a pre-indexed table (FAST_SCRTY_2) with only your security tree information. The security search view still joins to your live job data. The views based on this table aren’t as fast as those that work with the FAST_SCRTY_1 table, but they still greatly improve system performance, because key joins and indexing have been done ahead of time.

While your department and security tree data are static in this view, this information is usually less volatile; and you can access realtime changes to the rest of your Human Resources data. However, you must refresh this table whenever your Department information or Security Tree changes to ensure that your users have the most recent security access.

The following table lists the default global security views in PeopleSoft HRMS and the appropriate Fast View Table 2 replacement view.

Default Search View	***Fast Views***	***Based on Table:***
PERS_SRCH_GBL	FAST_PERSGL_VW2	FAST_SCRTY_2
EMPLMT_SRCH_GBL	FAST_EMPLMTGL_VW2	FAST_SCRTY_2

Fast View Table 3

When you use Fast View Table 3 in conjunction with Fast View Table 2, you load a pre-indexed table (FAST_EMP_BEN_1) with only your security tree information. The security search view still joins to your live job data.

You use Fast View Table 3 when you are using PeopleSoft Benefits Administration ***and*** you have Multiple Jobs turned on. If you are using PeopleSoft Benefits Administration but ***not*** Multiple Jobs, you will use Fast View Table 1 or 2.

You will always use Fast View Table 3 in conjunction with Fast View Table 2.

Default Search View	***Fast Views***	***Based on Table:***
EMP_BEN_SRCH_MJ	FAST_EMP_BEN_2	FAST_EMP_BEN_1

Choosing Fast View Table 1 or 2

While implementing the Fast View Table1 provides the greatest system response time gains, you need to take into account your special needs and weigh the performance and accuracy issues carefully before you decide which security search view option works best for your implementation of PeopleSoft HRMS.

Implementing Fast Views

Because switching to Fast Views requires use of Application Engine, Application Designer, and Process Scheduler, we recommend that the database administrator or someone in your organization is comfortable with using these tools perform this implementation.

You should also take into account your available disk space and processing time. The flat tables generated by the Application Engine HR_FASTVIEW might be large, depending on your system. They can take up a lot of additional disk space and may take some time to generate. Before you go live with any fast search view changes, we advise that you run batch processes to evaluate the size of the fast view table, how long it takes your system to generate the table, and so forth. Remember that you can use Process Scheduler from within the Application Engine tool to schedule the application to run during off peak hours.

To implement any of the new Fast Security Search Views on your own Human Resources system:

Steps one through five need only be done once to set up fast views. Step six is required for ongoing maintenance.

21. Use the Application Designer to verify that your tables are properly created.

- Verify that the fast view table you are using (FAST_SCRTY_1, FAST_SCRTY_2, or FAST_EMP_BEN_2) is in place and is ready to receive data.
- Don't exit Application Designer.

22. Use Application Designer to SQL Create the view.

- From within Application Designer, SQL Create the views that will run off the fast view table you are using.
- Exit Application Designer.

23. Execute Application Engine HR_FASTVIEW to insert data into the indexed tables.

- Use the Security Administration page to run the Fast View Application.
- Select the refresh type you are using:
  - Select Refresh Type 1 to refresh the Fast View Table 1, FAST_SCRTY_1.
  - Select Refresh Type 2 to refresh the Fast View Table 2, FAST_SCRTY_2.
  - Select Refresh Type 3 to refresh the Fast View Table 3, FAST_EMP_BEN_1.
- When you run HR_FASTVIEW, the system populates and indexes your human resources data into the flat tables that the Fast Security Views reference when you access your human resources database.

24. Check your Application Engine results.

Before you attempt to assign the Fast Security View to your system, we recommend that you double check to ensure that Application Engine program has populated the Fast Security Search tables as you expected, before you switch the search records using Application Designer. You can query the fast view tables to confirm that the data is there.

25. Assign the new Fast View to HRMS components using Application Designer.

To assign a new fast security search view to components your HRMS system, open Application Designer. As delivered, only components that have PERS_SRCH_GBL or EMPLMT_SRCH_GBL as search records can be assigned a fast view.

u. Select **File**, **Open**, **Object Type**, **and Menu.** The system displays the Open Object page.

v. Select one of the menu items from the list under **Objects Matching Selection Criteria.**

For example, select the object ADMINISTER_WORKFORCE_(GBL) to bring up the ADMINISTER_WORKFORCE_(GBL) menu.

w. Select the component that you want to switch to Fast Views from the menu.

Continuing the example, To apply Fast Views to the Personal Data component, select **Use, Personal Data** and double click **Personal Data.** The system will display the Menu

Item Properties page for the Personal Data menu item. In this example, the fast view FAST_PERSGL_VW1 replaces the default view PERS_SRCH_GBL.

x. On the Menu Item Properties page, select the **Override** check box and select a fast view to replace the default **Search Rec** (Search Record) shown.

In this example, the fast view FAST_PERSGL_VW1 replaces the default view PERS_SRCH_GBL.

y. Save your changes before you close Application Designer.

26. Refresh the indexed flat tables.

The data in the indexed flat tables is only as current as the last time they were refreshed. To keep the data up to date, you must refresh the data regularly. You can refresh the tables using the Security Administration page. You may want to use Process Scheduler to specify that the tables be refreshed once a day, once every few days, once a week, and so forth, depending on the Fast Security View option you've implemented, and your own data requirements.

For more information on the Process Scheduler, see Process Scheduler.

Updating Data Access Profiles and Fast Views

You must periodically update your Data Access Profiles and Security Fast Views so that they are based on the most current information. Use the Security Administration page to update your data access profiles and refresh your Security Fast Views, if you are using them.

Data Access Profile

You update your data access profile under the following circumstances:

- You create your security tree.
- You modify your security tree.
- You want to use a tree with a different effective date.

You should only update row-level security on the date the new tree takes effect, not before. The system uses whichever trees have the date closest to (not greater than) the date you enter when you run the utility.

Security Fast Views

You need to refresh your Fast View Table 1 under the following circumstances:

- You reorganize your security tree.
- You start using a different security tree.

- Your Job data changes.

  Because changes to Job data happen daily, you probably want to run this process nightly, so that the system retrieves most recent data.

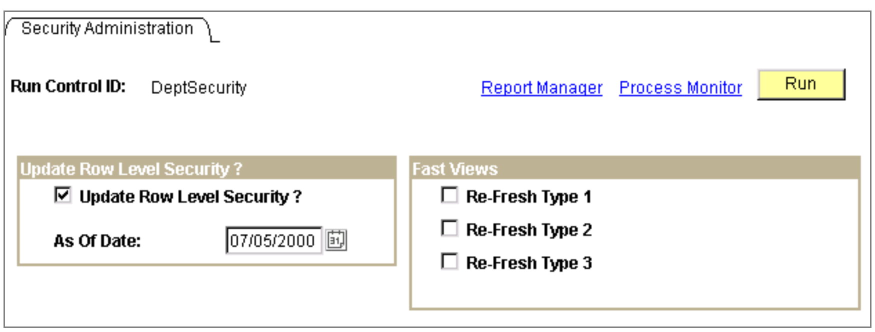
  You need to refresh your Fast View Table 2 (and 3, if you are using it) under the following circumstances:

- You reorganize your security tree.

- You start using a different security tree.

Security Administration Page

Usage	Use the Security Administration page to update your security tree row level security and your fast views, if you are using them.
Object Name	RUNCTL_FASTVW
Navigation	• **Define Business Rules, Administer HR System, Process, Security Administration, Security Administration** • **Administer Workforce, Mass Organization Changes USF, Process, Security Administration, Security Administration**
Prerequisites	You must have set up a Security Tree. If you are refreshing Fast Views, you must have done the initial setup.
Access Requirements	Enter a Run Control ID.



Security Administration page

Update Row Level Security?

Update Row Level Security   Select this check box to update the data access profile to correspond to your security tree information.

As Of Date	Select the date as of which you update your security tree. You should only update row level security on the date the new tree takes effect, not before. The system will, for each SetID, use whichever tree has the date closest to (not greater than) the date you enter when you run the utility.

Fast Views

Re-Fresh Type 1	Select this check box to refresh your Fast View Table 1.
Re-Fresh Type 2	Select this check box to refresh your Fast View Table 2.
Re-Fresh Type 3	Select this check box to refresh your Fast View Table 3.

Click **Run** to run this request. Process Scheduler runs the update row level security process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

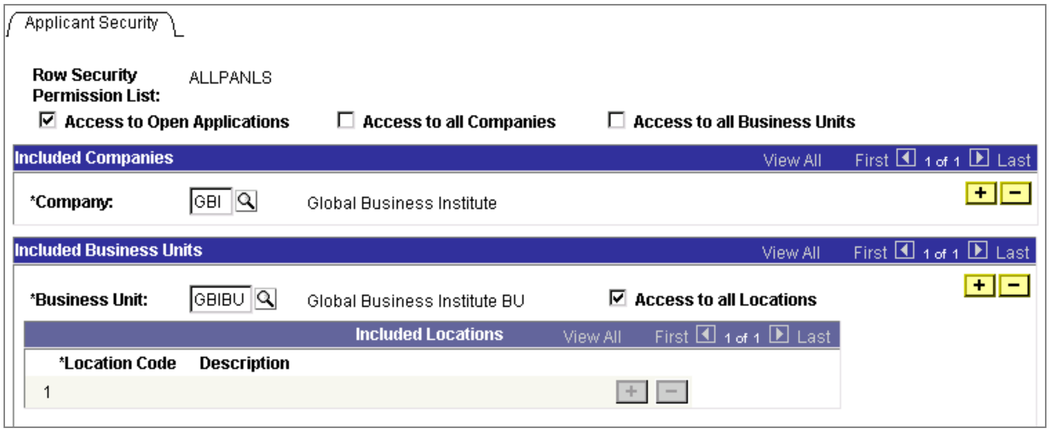
Setting up Security for Applicant Data

You use the Maintain Applicant Security page to grant or restrict user access to applicant records by company, business unit, and location. You define applicant security for data permission lists, which are then assigned to users on the User Profile component.

For more information about Hiring Applicants, see Administering Job Requisitions.

Applicant Security Page

Usage	Use the Applicant Security page to set up recruiter access to applicant data. You can assign access from this page to applicant data for all or selected Companies, Business Units, and Locations.
Object Name	SCRTY_TBL_APP
Navigation	**Define Business Rules, Administer HR System, Use, Maintain Applicant Security, Applicant Security**
Prerequisites	Before you can set up applicant security, you must create security classes for your organization and define your department security tree.
Access Requirements	Enter a Row Security Permission List.



Applicant Security page

The system displays the **Row Security Permission List** you selected. This field is for information only.

Access to Open Applications	Select the **Access to Open Applications** check box if you want to give the selected security class access to all applicants who aren't linked to a requisition.
Access to all Companies	Select the **Access to all Companies** check box if you want to give the selected security class access to applicant data in all companies. When you select this check box, the system makes the **Company** field unavailable for entry.
Access to all Business Units	Select the **Access to all Business Units** check box if you want to give the security class access to applications for all business units. When you select this check box, the system makes the fields in the **Included Business Units** group box and **Included Locations** grid unavailable for entry.

Included Companies

Company	Select the **Company** from the list of valid values. Add additional companies as required.

Included Business Units

Business Unit	Select the **Business Unit** from the list of valid values. Add additional business units as required. If you select the **Access to all Business Units** check box, the system makes the **Business Unit** field unavailable for entry.

Access to all Locations	Select the **Access to all Locations** check box if you want to give the security class access to all locations within the selected **Business Unit.** If you select this check box, you don't need to select locations; therefore, the system makes the **Included Locations** grid unavailable for entry.

Included Locations

Location Code	Select the **Location Code** from the list of valid values.
Description	When you move out of the **Location Code** field, the system completes the **Description.** This field is for information only.

Setting Up Security for Global Functionality

Global functionality refers to local functionality specific to a country. Country-specific functionality is in collapsible sections, marked by the countries flag, on the global components. To grant user access to local components, you use component permission. To grant access to the local functionality on global components, you use the Maintain Global Security page.

For more information on granting menu and component permissions, see Working with Permission Lists.

Controlling Access to Local Country Functionality on Global Components

To set up security and grant users access to local country functionality in the global menus in PeopleSoft HRMS:

27. Use the Installation Table 3 page to indicate the local country functionality that is installed as part of your HRMS system.

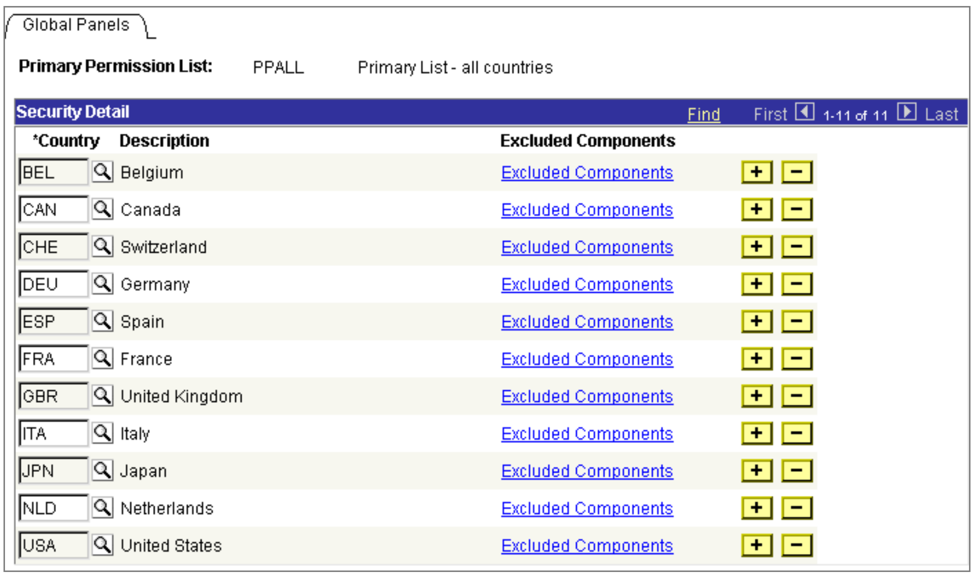
Unless a country is specified here, its local functionality can't be accessed by anyone.

28. Grant users access to country-specific functionality using the Maintain Global Security page.

Maintain Global Security –Global Panels Page

Usage	Use the Maintain Global Security – Global Panels page to select which local country functionality a Primary Permission List can access on the global pages in the PeopleSoft HRMS. You can also establish component-level security for local functionality on this page. You can hide the local functionality in a component to which a permission list

	has access, even when the permission list has access to that country's functionality on other components.
Object Name	SCRTY_TBL_GBL
Navigation	**Define Business Rules, Administer HR System, Use, Maintain Global Security, Global Panels**
Prerequisites	You must have set up the Primary Permission List on the Permission Lists component.
Access Requirements	Enter the Primary Permission List to which you are granting global security. Since global security is driven by the Primary Permission list linked directly to the user, only permission lists following the HRMS naming convention PPXXXX can be accessed here.



Maintain Global Security - Global Panels page

Primary Permission List Displays the **Primary Permission List** that you entered in the search page. The users assigned to this permission list have access to the local functionality of the countries you indicate here. **Primary Permission Lists** are defined on 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 on global components.

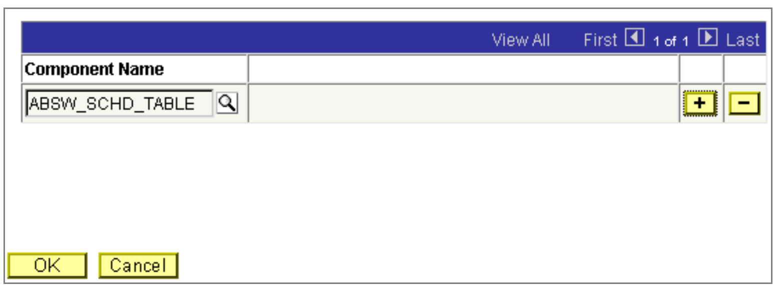
Excluded Components

When you click **Excluded Components,** the system displays the Excluded Components Page.

You can restrict access to country-specific functionality on specific components using the Excluded Components page. For example, you want to restrict a group of users' access to Italian-specific functionality on the Personal Data component, but you don't want to restrict their access to the Personal Data component or to Italian functionality on other components.

Excluded Components Page

Usage	Use the Excluded Components page to indicate on which components the local functionality for this country row should be hidden.
Object Name	SCRTY_GBL_SEC
Navigation	Click the Excluded Components link on the Maintain Global Security page.



Excluded Components page

Component Name

Select the name of the component whose global functionality for this country is being restricted. To restrict a group of users' access to Italian-specific functionality on the Personal Data component, select the Personal Data component.

Customizing Data Permission Security

As delivered, PeopleSoft HRMS provides you with a security structure designed to use organizational entities in a hierarchical format. When you grant or restrict user access to organizational entities, you use Data Permission Lists. This type of security structure works best in these circumstances:

- Users have access to data for employees in specific portions of your organization.
- Your security structure is based in large part on your organizational structure.

- The structure is hierarchical.

You don't have to grant and deny access to each organizational entity every single time you make changes. Effective dates and the hierarchical format of the trees greatly simplify maintenance.

You might want to modify your security if you want to prevent users from hiring or transferring employees into departments for which they don't have access or you might want to allow users to update their own data on components other than the Self-Service Internet applications.

Modifying Security for Hiring and Transferring Employees

PeopleSoft HRMS enables users to assign employees into departments they can't access for updates. To prevent a user without access from transferring an employee into a department, PeopleSoft HRMS contains a view, DEPT_TBL_ACCESS, that shows only those Department IDs that a user is authorized to access.

If you choose to use this view, you need to create a class of users who do have access to all departments, so that they can perform transfers.

To use the view, you need to update the JOB record definition in Application Designer, so that the prompt table for the DEPT_ID field is DEPT_TBL_ACCESS.

For more information on Application Designer, see PeopleSoft Application Designer.

Allowing Employees to Update Their Own Data

PeopleSoft HRMS as delivered doesn't allow users to update their own data, other than with the Self-Service Internet applications. However, you might have circumstances in which you want to allow them to update some of their own data in other components.

To allow users to update their own data, you can implement the PeopleCode function AllowEmplIDChg. The function looks for a single Boolean parameter. When this is set to true, employees may update their own data; when it is set to false, they may not.

In our example–allowing employees to change their own personal data–you enable the PeopleCode function for PERSONAL_DATA, the underlying record definition for the Personal Data component. This enables employees to change their personal data, but not their job information.

To enable the Allow EmplIDChg function, open the record PERSONAL_DATA in Application Designer. Open the RowInit PeopleCode on the EMPLID field. Insert new code after this line:

```
/************ START OF ROW INIT PEOPLECODE *************/
```

Insert a row and enter the following code after the first line, which is a comment, of existing code:

```
if %Page = PAGE.PERSONAL_DATA1B then
    AllowEmplidChg(true);
end-if;
```

Save your changes and exit the PeopleCode page. Employees can now update their own data using the Personal Data page.

To allow employees to update their own data in other places in PeopleSoft HRMS you must enter this PeopleCode function in the underlying record definition for each page on which you want to allow updates.

For more information on Application Designer, PeopleCode, and search records, see PeopleSoft Application Designer.

Search Views in PeopleSoft HRMS

The chart lists all search views in the PeopleSoft HRMS application line.

If you're modifying security search views, it's important that each view is appropriately altered–otherwise your security is compromised.

Security View or SubRecord
ABS_DEPT2_VW
ABS_MT_SRCH_UK
APP_MNGR_SRCH
APPRV_SRCH
ASGN_CMP_SRCH
BEN_BCSB_SCH_MJ
BEN_BCSP_SCH_MJ
BEN_BI_CSB_SRCH
BEN_BI_CSB_SRCH
BEN_BI_CSP_SRCH
BEN_BI_CSP_SRCH
BEN_BI_PY_SRCH
BEN_BI_PYS_SRCH

Security View or SubRecord
BEN_BI_SRCH_MJ
BEN_BI_SRCH_VW
BEN_BI_SRCH_VW
CAR_PLAN_SRCH
CAREER_MAN_VW1
CAREERPLAN_SRCH
CBR_ACTVTY_SRCH
CBR_BEN_SRCH_MJ
CBR_BENEF_SRCH
CBR_BENEF_SRCH
CBR_EVENT_SRCH
CBR_FSA_SRCH
CBR_FSA_SRCH
CBR_FSA_SRCH_MJ
CBR_NONEMP_SRCH
CBR_PAR_SRCH1
CBR_PAR_SRCH2
CNT_SRCH_ESP
CNT_SRCH_GBL
CNT_SRCH_JPN
DEPARTMENT_SRCH
DEPT_INCR_SRCH
DEPT_TBL_ACCESS
DIR_REPORTS_VW4
EMP_BEN_SRCH_MJ
EMPL_BEN_SRCH
EMPL_COMP_SRCH
EMPL_COMP_SRCH1
EMPL_COMP_SRCH2
EMPL_COMP_SRCH3
EMPL_NAME_SRCH

Security View or SubRecord
EMPL_TERMS_VW
EMPLMT_ADD_SRCH
EMPLMT_SRCH_BEL
EMPLMT_SRCH_CHE
EMPLMT_SRCH_CN
EMPLMT_SRCH_ESP
EMPLMT_SRCH_FRA
EMPLMT_SRCH_GBL
EMPLMT_SRCH_GBL
EMPLMT_SRCH_GER
EMPLMT_SRCH_ITA
EMPLMT_SRCH_NLD
EMPLMT_SRCH_ST
EMPLMT_SRCH_UK
EMPLMT_SRCH_US
FSA_CLAIM_SRCH
FSA_CLAIM_SRCH
FSA_CLM_SRCH_MJ
FSA_DC_SRCH
FSA_HC_S_CAN_MJ
FSA_HC_SRCH
FSA_HC_SRCH_CAN
FSA_HC_SRCH_CAN
FSA_PARTIC_SRCH
FSA_PAYMT_SRCH
FSA_RC_S_CAN_MJ
FSA_RC_SRCH_CAN
FSA_RC_SRCH_CAN
GP_EMPLMT_SRCH
GRIEVANCE_SRCH
GRIEVANCEI_SRCH

Security View or SubRecord
HR_SS_EMPL_SRCH
INTERVW_SRCH
INTERVW_SRCH_CN
INTERVW_SRCH_JP
INTERVW_SRCH_US
JOB_REQ_OP_SRCH
JOB_REQUIS_SRCH
KEY_POSN_SRCH
MILIT_SRC_FRA
NE_STUDENT_SRCH
NID_DEP_SRCH_VW
NID_SRCH_VW
NVQ_SRCH
P11D_UK_SRCH
PA_RT_EMP_SRCHU
PAY_EMPSRCH_NLD
PERS_BEN_SRCH
PERS_SRCH_BEL
PERS_SRCH_CHE
PERS_SRCH_CN
PERS_SRCH_ESP
PERS_SRCH_FRA
PERS_SRCH_FTS
PERS_SRCH_GBL
PERS_SRCH_GER
PERS_SRCH_ITA
PERS_SRCH_NLD
PERS_SRCH_PTS
PERS_SRCH_ST
PERS_SRCH_TIPS
PERS_SRCH_UK

Security View or SubRecord
PERS_SRCH_US
PERS_STUDENT_VW
POSITION_SRCH
POSN_SUCC_SRCH
PRIM_EMPL_SRCH
ST_CNT_SRCH_ST
SUCCESS_EM_SRCH
SUCCESSION_SRCH
TN_DEPEFDVW_LNG
TN_DMNDEPVW_LNG
TRAIN_HIST_SRCH
TRAINING_SRCH
TRN_BGTSRCH_LNG
TRN_BUDGET_SRCH
TRN_DEPTEFFD_VW
TRN_DIS_SRCH
TRN_DISSRCH_LNG
TRN_DMNDDEPT_VW
TRN_DMNDEE_SRCH
TRN_EE_COST_SRC
VC_AWDALC_VW
VC_AWDALC2_VW
VC_AWDALC3_VW
VC_PLAN_HIST_VW
VC_PLAN_PERS_VW

Self-Service Transactions Security

Self service transactions are listed under six different menus: Applicant, Employee, Faculty, Manager, Optionee, and eBenefits. Each of these menus represents the role of the user as they access the transactions listed under that menu. For example, a user changing their emergency contact information is acting as an employee, so the Emergency Contact component is an Employee self-service transaction. A user granting an employee a promotion is acting as a manager, so the Promote Employee component is a Manager self-service transaction.

Much of self-service security is based on information you set up elsewhere in the system, such as employee ID or Manager ID. However, there is some setup required for some types of transactions.

Setting Up Security for Applicant Self-Service Transactions

You don't need to set up security for Applicant self-service transactions. Internal and external applicants can access the Applicant self-service transactions (Apply For Job and View Job Postings). External applicants register to use the transactions using their email address and a password. With that information, the system will assign them a UserID. Internal applicants will already have a UserID.

Setting Up Security for Employee, Faculty, Optionee, and eBenefits Self-Service Transactions

You don't need to set up security for Employee, Faculty, Optionee, and eBenefits self-service transactions. The search views of these self-service components are set up to only retrieve the data row that matches the ID of the user. Therefore, when an employee logs on to the system and uses an Employee, Faculty, Optionee, or eBenefits self-service transaction, the only data they will be able to retrieve is their own.

Your user profiles must be attached to EmployeeID for this to work.

For more information about setting up user profiles, see Security. For more information on security and search views, see How Does Data Permission Security Work?

Setting Up Security for Manager Self-Service Transactions

The system determines access to Manager self-service components and data by answering two questions: Is this user a manager? and Who reports to this manager? The answer to the first question determines if the user will have access to the component at all. The answer to the second question will determine whose data the user will be allowed to view and manipulate.

You will determine a user's access to some or all of the Manager self-service components when you are defining their component access on the Permission List pages. You will specify whose data a user can see for a given Manager self-service transaction on the Manager Self Service Options component.

In order to answer the 'Who reports to this manager?' question, the system has to determine what kind of reporting relationship exists between a user and their employees. Reporting relationships can be determined on two different pages: the Work Location page and the Department Profile page.

On the Work Location page, you can enter a Supervisor ID or a Reports To ID (if you are using Position Management) to indicate who an employee's manager is. On the Department Profile page, you can enter a Manager ID to indicate who manages a department and the employees that report to that department.

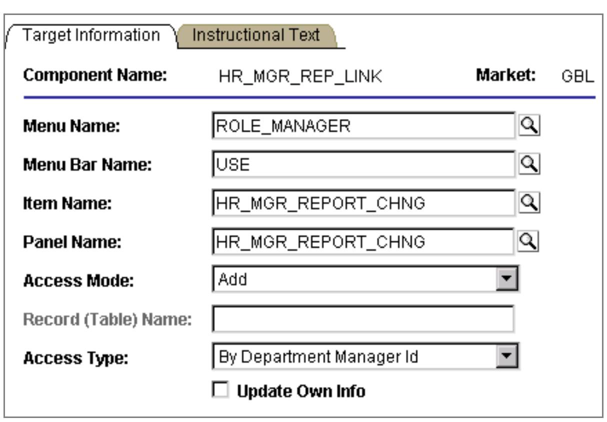
Using the information you set up on the Manager Self-Service Options component and the employee IDs you enter in the Supervisor ID, Reports To, and Manager ID fields, the system can determine which employees' data is accessible to a user for a given Manager self-service component. The system will only display the names and data of employees that report to the user, using either by the information on the Work Location page or on the Department Profile page.

When a user selects a Manager self-service transaction from either the Manager - Task or Manager - View menu, the system displays the Select Employees page for the selected transaction. The Select Employees page displays a list of employees whose data the user can access. When the user selects one or more employee, the system will move to the transaction component so that the user can view or manipulate the employee(s) data.

You use the Manager Self Service Options - Target Information page to specify which reporting relationship the system should use to determine which employees are displayed on the Select Employees page for a given transaction. You will also indicate which page in the transaction component the system will move to after the user selects an employee.

Manager Self Service Options - Target Information Page

Usage	Use the Target Information page to set up employee data access for the Manager self-service option components.
Object Name	SS_LINK_TBL
Navigation	**Define Business Rules, Administer HR System, Setup, Manager Self Service Options, Target Information**
Prerequisites	None.
Access Requirements	Enter a Component Name and a Market in the search dialog box.



Manager Self Service Options - Target Information page

To determine technical names of the system objects, use the Application Designer.

For more information about the Application Designer, see PeopleSoft Application Designer.

Component Name	Enter the **Component Name**, as it is defined on the menu in the Application Designer. Manager self-service **Component Names** should end in _LINK (for example, ***HR_MGR_REP_LINK***). The **Component Name** is the name of the Select Employee page that the system will display when the user selects a Manager self-service transaction from either the Manager - Task or Manager - View menu. It isn't the name of the transaction component. The Select Employee page is the page that displays the list of employees that a user can select to view employee data.
Menu Name	Select the ***ROLE_MANAGER*** menu. All Manager self-service transactions are delivered on this menu. If you want to grant manager access to components on other menus, select the name of the menu the component is on.
Menu Bar Name	Select the name of the menu bar 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 the pages that the user uses to view or manipulate employee data.
Panel 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 **Panel Name** of the transaction page you want the system to jump to first when users select an employee name (most likely the first page in a component).
Access Mode	Select which action users will perform in the transaction (***Add***, ***Update/Display***, ***Update/Display All***, or ***Correction***).
Record (Table) Name	Enter the object name of the record that makes up the page of the transaction component.

Access Type

Select what determines the reporting relationship for the Select Employee page for this transaction component.

If you select ***By Department Manager ID*** the system will define the reporting relationship based on the information in the Manager ID field in the Department Profile page. The system will present the user with a list of the employees in the user's department for those users who are department managers.

If you select ***By Reports To Position,*** the system will define the reporting relationship based on the information in the Reports To field in the Work Location page. The system will present the user with a list of the employees whose Job record indicates that they report to the user's position.

If you select ***By Supervisor ID*** the system will define the reporting relationship based on the information in the Supervisor ID field in the Work Location page. The system will present the user with a list of the employees whose Job record indicates that they are supervised by the user.

If you select the ***By Dept Security Tree*** you will determine employee data access using the information set up on the security tree. The system will present the user with a list of the employees whose data the user has access to as determined by the security tree.

For more information about department security, see Building and Modifying Security Trees.

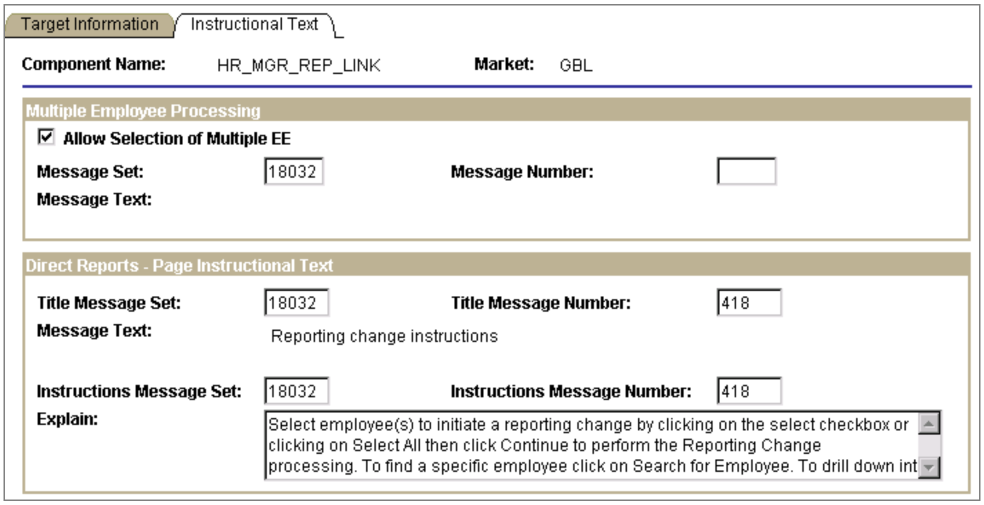
Update Own Info

Select this check box to allow managers to update their own information in this transaction component.

Manager Self Service Options - Instructional Text Page

Usage	Use the Instructional Text page to specify if a manager can perform an action on multiple employees at once for this transaction component and to add instructional messages to the Select Employee page for this transaction component.
Object Name	SS_LINK_TBL
Navigation	**Define Business Rules, Administer HR System, Setup, Manager Self Service Options, Target Information**
Prerequisites	None.
Access	Enter a Component Name and Market in the search dialog box.

Requirements	



Manager Self Service Options - Instructional Text page

Multiple Employee Processing

Allow Selection of Multiple EE Select this check box to allow users to select and make changes to one or more employees at once. If you don't select this check box, users will have to select each employee separately.

This function is useful if the component performs a transaction that would often affect more than one employee (such as transferring departments).

Message Set Enter the **Message Set** of the message that you want the system to display for transactions that allow multiple selection of employees.

Messages are maintained in the Message Catalog.

Message Number Enter the **Message Number** of the message that you want the system to display for transactions that allow multiple selection of employees.

Messages are maintained in the Message Catalog.

Message Text Displays the text of the message associated with the **Message Number** you entered above. The system will display this text with transactions that allow multiple selection of employees.

Direct Reports - Page Instructional Text

Title Message Set Enter the **Title Message Set** of the transaction instructions title that you want the system to display on this component's Select Employees page.

Messages are maintained in the Message Catalog.

Title Message Number Enter the **Title Message Number** of the transaction instructions title that you want the system to display on this component's Select Employees page.

Messages are maintained in the Message Catalog.

Message Text Displays the transaction instructions title text associated with the **Title Message Number** you entered above. The system displays this text on this component's Select Employees page.

Instructions Message Set Enter the **Instructions Message Set** of the instructions message that you want the system to display on this component's Select Employees page.

Messages are maintained in the Message Catalog.

Instructions Message Number Enter the **Instructions Message Number** of the instructions message that you want the system to display on this component's Select Employees page.

Messages are maintained in the Message Catalog.

C H A P T E R 9

Using Mass Change

Regular business cycles occasionally require you to make the same change to a large group of your PeopleSoft HRMS data. For instance, suppose a business restructuring requires you to transfer all employees from the marketing department to a newly formed corporate communications department. Performing this transfer manually is an onerous and error-prone task. But the Mass Change functionality of PeopleTools enables you to select a particular set of employee records from the database, define the alteration you would like to perform on those records, and make those changes in the background, using scheduled processing.

Because most businesses perform the same types of mass changes over and over again, mass changes are defined using Mass Change templates. These templates simplify Mass Change definition by storing information used to select certain data from the database and to modify it in specific ways. Usually you only have to modify selection and replacement values.

Because of its extreme power to change a large number of Human Resources records behind the scenes during scheduled processing, we strongly recommend that only the most experienced users operate the Mass Change function. These users should have both a solid understanding of SQL and an extensive knowledge of the PeopleSoft HRMS database.

The mass change features discussed in the first part of this section aren't currently supported for PeopleSoft 8 HRMS for U.S. Federal Government. We document the federal functionality later in this section, in USF Performing Mass Organization Changes.

For more information about designing Mass Change, see Mass Change.

What is Mass Change?

Mass Change is a SQL generator that you use to perform high-volume business transactions, such as updating data for multiple employees, without accessing each one online. Its function is similar to PS/Query, but while PS/Query retrieves data from your database, Mass Change actually updates the database.

Mass Change is commonly used for these tasks:

- Performing high-volume, set-oriented transactions.
- Copying data from table to table.
- Archiving table data.
- Performing transactions not normally supported through the pages.

This section isn't intended to be a full discussion of all aspects of Mass Change. It is designed to discuss using Mass Change with your PeopleSoft HRMS application.

For more information about Mass Change and its technical aspects, see Mass Change.

Understanding Mass Changes in PeopleSoft HRMS

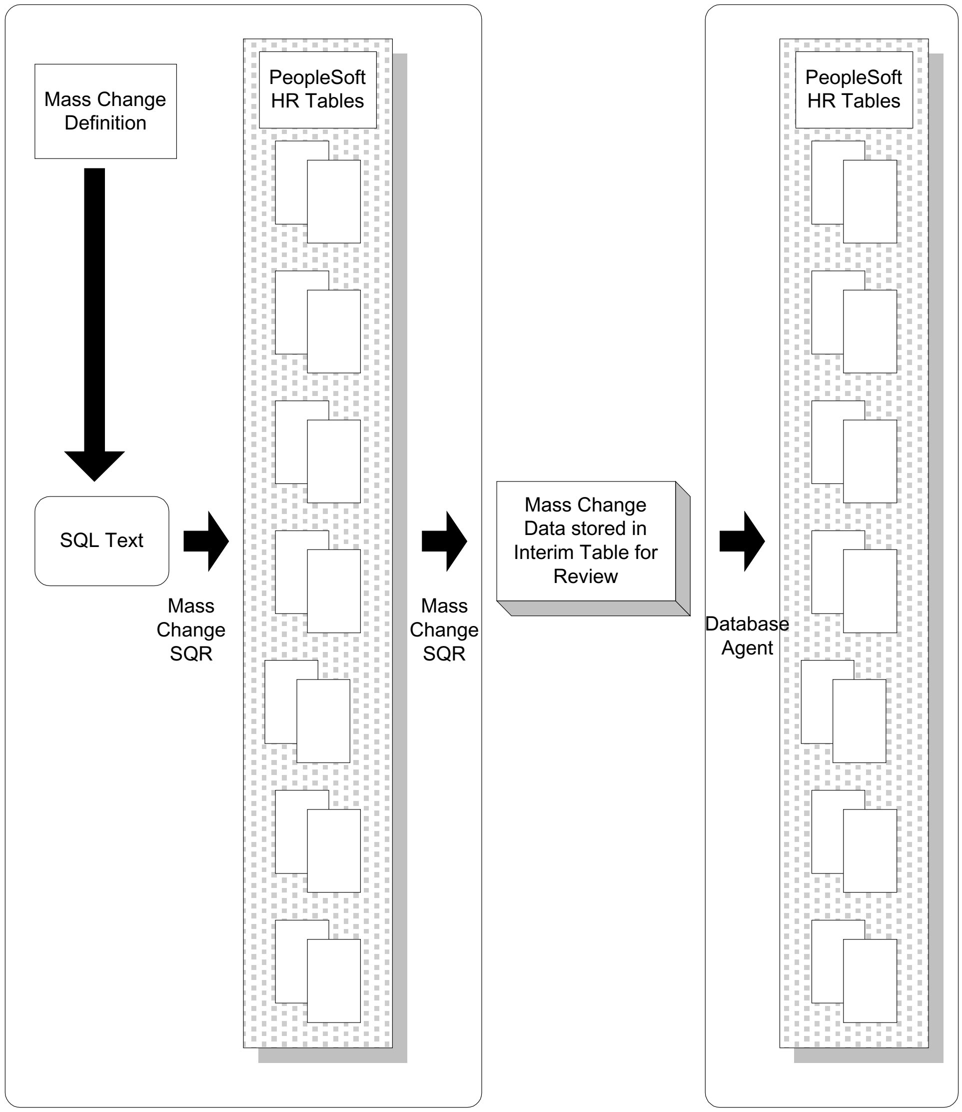
Processing mass changes consists of a definition phase and a processing phase. First, you define the selection criteria and changes to be made to the selected data; then you run the SQRs that process the changes you defined. In general, you follow the following guidelines.

Definition Phase

1. Choose a Mass Change template and use it to create a mass change definition. Outline the criteria for selecting rows and identify the columns and values to be changed.
2. Generate the SQL.

Processing Phase

3. Run the Mass Change SQR to select, change, and transfer the data to the Temporary Job Tables.
4. Review the data for accuracy (optional, but recommended).
5. Run the database agent to load the data from the Temporary Job Tables into your PeopleSoft HRMS tables (if applicable).



Mass Change in PeopleSoft Human Resources

For example, you can use the templates we provide with PeopleSoft Human Resources to perform the following tasks:

- Update salary data.
- Update department data.
- Remove data rows from the Temporary Job record.
- Update the mass change status for the Temporary Job record.

Setting Up Mass Change Security

Prior to using Mass Change for the first time, you should consider who in your organization should be authorized to use Mass Change templates and execute mass changes. Because Mass Change is a powerful tool with the ability to modify large portions of your data, we recommend that you give Mass Change security careful consideration.

For more information about setting up Mass Change security, see Mass Change.

Mass Change Security governs whether users assigned to a particular permission list can run mass changes online, the templates available to a user, and what mass changes the user can execute. To set Mass Change security, use the Maintain Security Permission Lists component.

Defining Mass Change Security

Use the Mass Change Security page to specify which templates users assigned to a permission list can access and whether they can execute Mass Change online.

Select OK To Execute MC Online? if you want to enable users assigned to this permission list to execute mass changes from an online page. Executing Mass Change online is best done for testing purposes or for making updates to a small database. We recommend that large mass change jobs be scheduled during off- peak usage time, as mass changes can significantly impact system performance.

Select the Authorized Templates that users assigned to this permission list can use to define mass changes. Users can only execute mass changes that are based on Authorized Templates.

Defining a Mass Change

Before you run the SQR that transfers and alters data, you need to provide information about the changes to be made. Most of the pages related to mass changes are found in the PeopleTools Mass Change menu; the pages you use to enter the definition are in the Use menu.

Understanding a Mass Change Example

While you will undoubtedly find many uses for the Mass Change feature in all of your PeopleSoft HRMS applications, to illustrate how you might tap its potential, we've created several Mass Change templates you can use to update specific data, according to various combinations of criteria. For example, if you're consolidating two departments into one in PeopleSoft Human Resources, you need to create new Job records with the correct department code for all employees in the obsolete department.

To perform this process using Mass Change, you run PER099 to update the tables. Then you specify selection criteria and new default field job data in your mass change definition. You then run the mass change SQR that places employee Job data in a Temporary Job Table. There you can review and approve the job records you actually want to update. Once you are through reviewing the employee list, you run the database agent, which takes the approved temporary Job records and uses them to insert current data rows or update, with the specified change, existing future Job records for those employees. The following sections explain this process in greater detail. Remember, this is just one example of how you might use Mass Change with HRMS.

Running PER099 for Employee-Related Mass Changes

If your mass change includes any employee information, you must run the Refresh Employees Table process (PER099 SQR) before you select criteria and defaults for your mass change. This updates all employee information as required by the Mass Change facility.

Starting With Mass Change

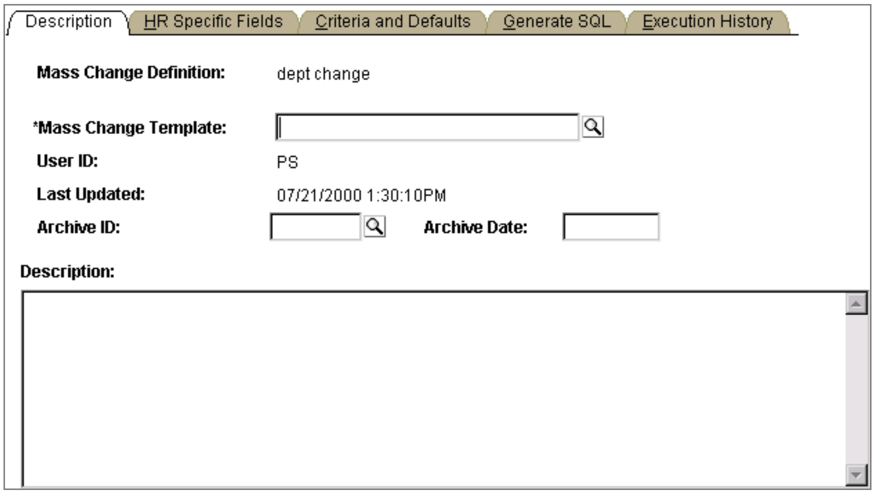
To add or update a mass change definition, you use the Mass Change definition component.

Enter the Mass Change Definition. The definition should be as descriptive as possible within the field's 30-character limit.

Mass change definitions remain in the system until you run the Delete Mass Change Definition template to delete the entire mass change definition. You can also search for a definition based on Mass Change Type or Mass Change Template ID if you know them.

Mass Change Definition - Description Page

Usage	Every mass change must be attached to a predefined mass change template. Use the Description page to specify the mass change template.
Object Name	MC_DEFN_00
Navigation	**Define Business Rules, Administer HR System, Use, Mass Change Definition, Description**
Prerequisites	None.
Access Requirements	Enter a Mass Change Definition.



Mass Change Definition - Description page

Select a **Mass Change Template** from the list of templates. Mass change templates specify which data files the system reference when you execute a mass change. Your choice of template should be based on how broad or narrow your selection criteria are. Depending on the type of mass changes you are implementing, choosing the appropriate template can significantly enhance your system's performance and processing time.

The following Department Change Templates are available in PeopleSoft Human Resources:

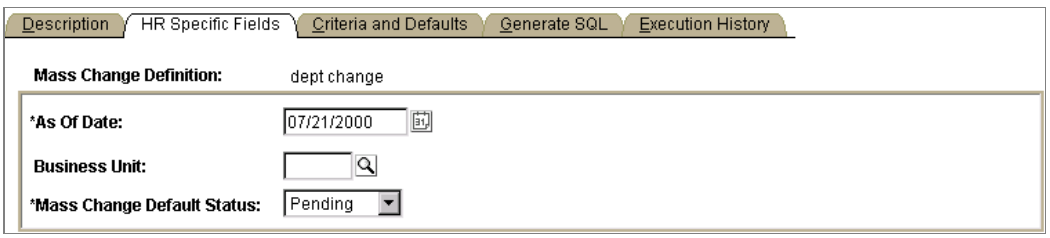
Template	***Description***
Dept Change Insert Job	You may select employees based on the various fields on the Job record.
Dept Change Insert Job - Common	Select employees based on the more likely criteria fields from the Job, Employment, and Personal Data records.
Dept Change Insert Job - Emp	This template enables complex selection criteria. You may select employees based on the various fields on the Job and Employment data record.
Dept Change Insert Job - Emp, Per	You may select employees based on the various fields on the Job, Employment, and Personal Data records.
Dept Change Insert Job - Per	Select employees based on the various fields on the Job and Personal Data record.

When you select a template, the system displays the appropriate **Description.** Each **Description** includes useful information about the specific data records the template references, points out required values for selection criteria and defaults, and specifies the temporary files that the mass change template creates. You can also add your own comments to document the mass change in the **Description** field.

For more information about these and other PeopleSoft Human Resources templates, see PeopleSoft Human Resources Mass Change Templates.

Mass Change Definition –HR-Specific Fields Page

Usage	Use the HR-Specific Fields page to specify the effective date for the mass change records and indicate the mass change record status.
Object Name	MC_DEFN_HR
Navigation	**Define Business Rules, Administer HR System, Use, Mass Change Definition, HR Specific Fields**
Prerequisites	None.
Access Requirements	Enter a Mass Change Definition.



Mass Change Definition –HR Specific Fields page

The **As Of Date** defaults to today's date. The **As Of Date** is used to find the appropriate Job Records for this transaction. We recommend that you make this date the same as the date you want your change to take effect. Mass Change shouldn't be used to perform retroactive record changes.

For more information about using current and future effective dates when updating employee records, see Updating Workforce Information.

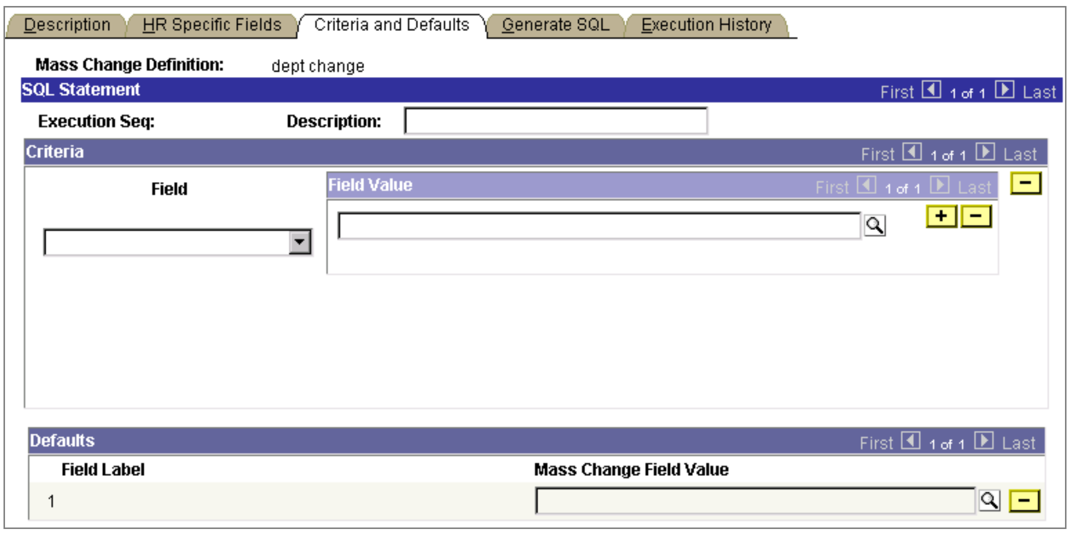
Select the **Business Unit** to which these departments belong.

Specify a **Mass Change Default Status.** The **Mass Change Default Status** sets the Status value of all mass change records created when you run this mass change definition. Set the **Mass Change Default Status** to ***Pending,*** if you want to review and approve the data prior to running the database agent. Set the status to ***Approved,*** if you don't want to have to approve the date before running the database agent with just a cursory review of the mass change data. You can still review the data; you just won't have to approve it.

If a user schedules the database agent, the agent attempts to process any appropriate transaction with an ***Approved*** status, regardless of the mass change definition. As such, all records with an ***Approved*** status should be ready for processing into your PeopleSoft Human Resources tables.

Mass Change Definition - Criteria and Defaults Page

Usage	On the Criteria and Defaults page, you specify the field criteria to use for selecting records from the database, identify which fields to change, and how they are to change.
Object Name	MC_DEFN_01
Navigation	**Define Business Rules, Administer HR System, Use, Mass Change Definition, Criteria and Defaults**
Prerequisites	None.
Access Requirements	Enter a Mass Change Definition.



Mass Change Definition - Criteria and Defaults page

The **Description** field defaults to the data record files specified by the mass change template you select on the Description page.

Criteria fields are those fields that you use to select records from the database. Use the scroll bar to move through the list of fields available for the selected mass change template. Criteria fields are set using SQL operators and values.

You can only enter one SQL operator for each field. You can, however, enter multiple values.

The following table lists the operators and how they are used.

Operator	*Meaning*
<	Less than
< =	Less than or equal to
< >	Not equal to
=	Equal to

>=	Greater than or equal to
>	Greater than
Between	Between value A and value B
Not BTW	Not between value A and value B
In Subset	In a subset of
Not In	Not in a subset of (complement)
Like	Like (Used with a % wildcard)
Not Like	Not like (Used with a % wildcard)
Is Blank	Field is blank (could have a space or a zero)
Not Blank	Field is not blank
Is Null	Field is null (the field is absolutely empty)
Not Null	Field is not null

You may delete or leave fields blank, if you do not want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another mass change with the same template. However, if you leave the criteria field blank, you get a warning message for each field that you leave blank when you execute your SQL statement.

The **Defaults** group box specifies which **Fields** change and how. For all selected records, the value you specify is entered into the appropriate field. If appropriate, click the list box down arrow to display valid values for a field.

Although you are using Mass Change to effect updates to a large group of employee records, the process makes the same edits as if you processed each transaction online. The Default fields scroll list points to any additional field values that must be set, accompanying a valid department change. For example, to execute a valid department change, you must enter a valid Action and Action Reason for a department change to occur. You might want to perform a department change online first, to make sure that the Action and Action Reason are valid for a department change.

Important! Database agents can update unavailable fields in PeopleSoft applications. This ability can be useful when you run mass changes generally. When running Department mass changes, however, keep in mind that the mass change database agent can map data into the unavailable fields on an employee's Job Record, overwriting the existing data. This is an especially important consideration for users steering their system using PeopleSoft Position Management. If a worker in the mass change transaction is a positioned employee (under Position Management control), make sure that the default values that you enter as part of your Mass Change Definition Criteria and Defaults aren't unavailable in the online Job Data pages.

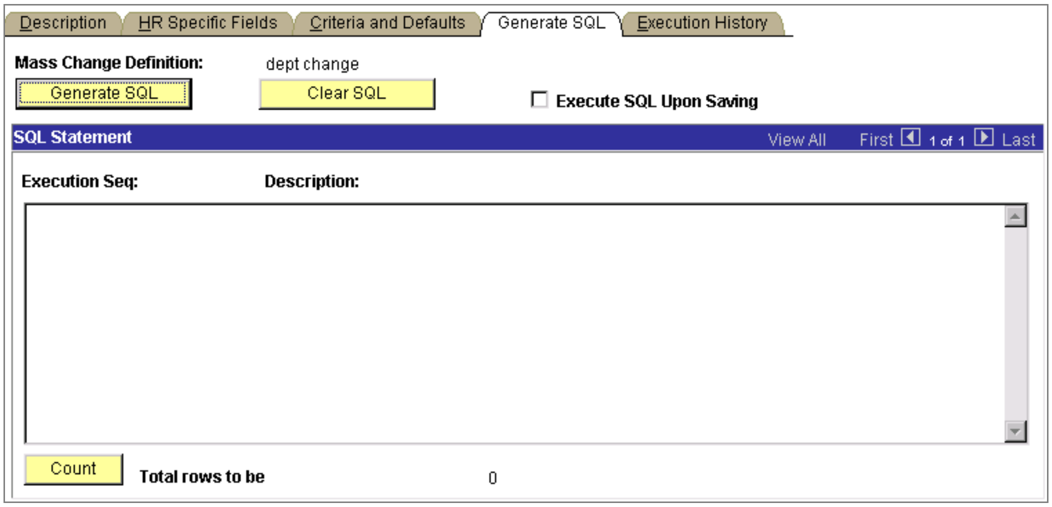
You must also provide the Effective Date and Sequence Number for the new Job records. This is the date you want the department change to take effect. Scroll down the Default Fields scroll list to see these additional fields.

For more information about updating employee records in PeopleSoft Human Resources, see Updating Workforce Information.

Avoid retroactive department changes; they might cause numerous errors when you use the database agent to insert the new Job records.

Mass Change Definition - Generate SQL Page

Usage	You must generate the SQL prior to executing the mass change. Generating the SQL Statement also affords you the opportunity to review the SQL text before running the mass change.
Object Name	MC_DEFN_02
Navigation	**Define Business Rules, Administer HR System, Use, Mass Change Definition, Generate SQL**
Prerequisites	None.
Access Requirements	Enter a Mass Change Definition.



Mass Change Definition - Generate SQL page

To generate the SQL text, click **Generate SQL.** To clear the SQL text, if you want to change your mass change definition and regenerate the SQL, click **Clear SQL.**

Click **Count** to check how many data rows your SQL Statement inserts. (Be sure to save the SQL Statement first so that you get the total for the current one.)

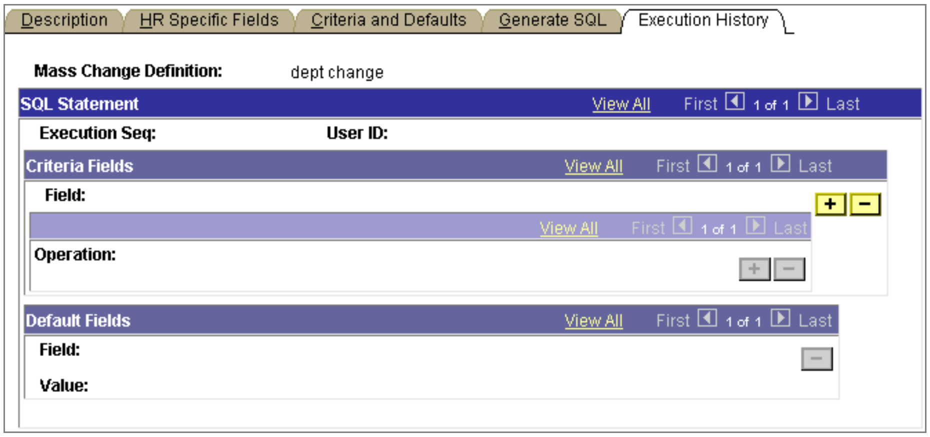
If you go back to an earlier page and make changes, you must clear the current SQL text and click **Generate SQL** again. If you don't, then you process the mass changes using the incorrect SQL Statement.

To generate SQL online, select the **Execute SQL Upon Saving** check box and save the page. The primary permission list assigned to your UserID determines whether you have permission to execute mass changes online.

If you left any fields blank in the Criteria and Defaults page, the system warns you that these fields are blank.

Mass Change Definition - Execution History Page

Usage	To view information about a mass change definition, use the Mass Change Definition History page.
Object Name	MC_DEFN_03
Navigation	**Define Business Rules, Administer HR System, Use, Mass Change Definition, Execution History**
Prerequisites	None, but this page only displays information for mass change definitions that have been processed.
Access Requirements	Enter a Mass Change Definition.



Mass Change Definition - Execution History page

This page provides only information about the mass change definition, including **SQL Statement,** the **Criteria,** and **Default Fields** information. The page also provides the date and time the mass change definition was last updated.

Transferring Mass Change Data Into Temporary Job Tables

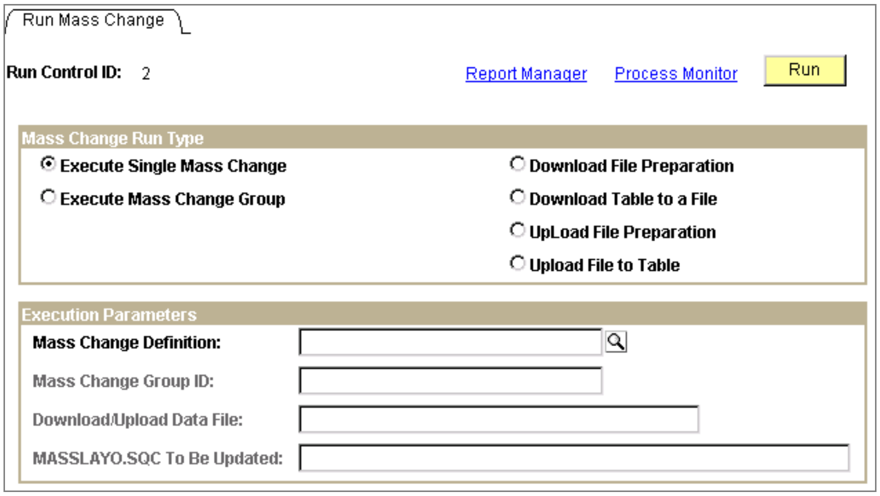
At this stage in the process, you've completed a mass change definition and are ready to transfer the selected data into the temporary table. The Mass Change SQR dynamically executes the SQL generated from your mass change definition.

Executing Mass Changes

Mass changes can be executed either online or in the background. To execute a mass change online, use the Generate SQL page in the Mass Change Definition component.

Run Mass Change Page

Usage	Use the Run Mass Change Page to specify which mass change you want to execute so you can execute a mass change in the background. The primary permission list assigned to your UserID determines which mass change templates you have permission to execute.
Object Name	RUN_MASSCHNG
Navigation	**Define Business Rules, Administer HR System, Process, Mass Change, Run Mass Change**
Prerequisites	You must have defined a mass change on the Mass Change Definition component.
Access Requirements	Enter a Run Control ID.



Run Mass Change page

Select a **Mass Change Run Type.** Each run type requires an additional **Execution Parameter.** Select **Execute Single Mass Change** for your PeopleSoft Human Resources Mass Changes.

Click **Run** to run the Mass Change process.

For more information about the additional Run Types and Execution Parameters, see Mass Change. For more information about Process Scheduler, see Process Scheduler.

Verifying Data in the Temporary Tables

You can take a look behind the scenes to see what data was loaded into JOB_TMP_MC by the mass change SQR. This provides you the opportunity to preview the data that is loaded into the PeopleSoft Human Resources tables when you run the appropriate database agent. If you catch errors, you should cancel the individual transaction by selecting a status of Canceled, or delete the records, make necessary modifications to the mass change definitions, and run the SQR again.

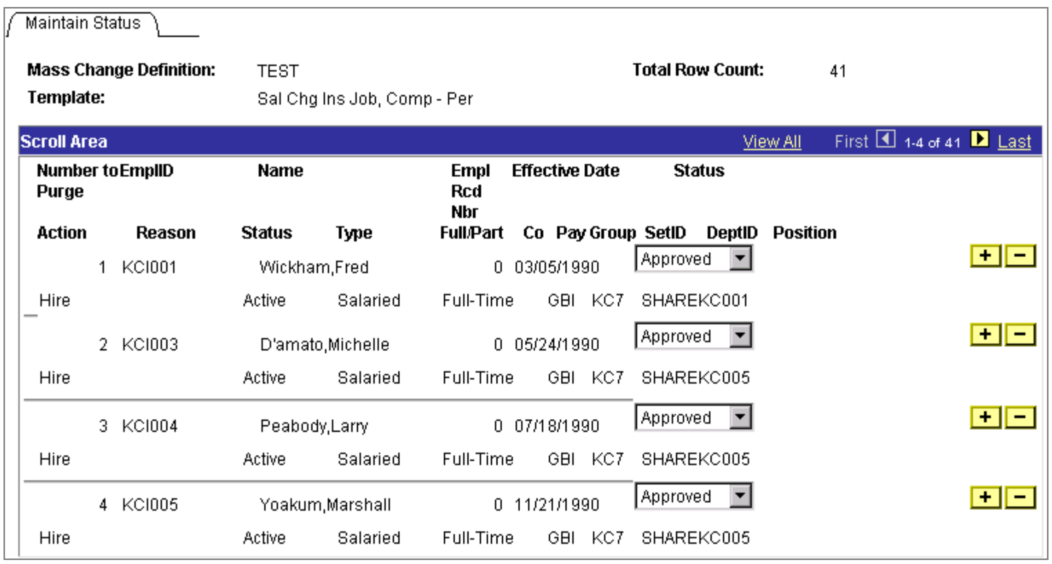
You can use the two mass Job/Comp (compensation) Change Inquire pages: Mass Change by Status and Mass Change by Dept (Department). These pages are designed to handle multiple pay components.

Use the Mass Job/Comp Change by Status page to view a list of the records with the changes displayed. If you don't change the default in the HR Parameters page, all of your mass change records have a status of Pending.

Use the Mass Job/Comp Change by Dept page, if the temporary table is large and you want to review the records produced by the mass change process by department to make your review easier.

Mass Job/Comp Change by Status - Maintain Status Page

Usage	Use the Maintain Status page to view mass job and compensation changes by status or department.
Object Name	JOBCMP_TMP_MC
Navigation	• **Define Business Rules, Administer HR System, Inquire, Mass Job/Comp Chg By Deptid, Maintain Status** • **Define Business Rules, Administer HR System, Inquire, Mass Job/Comp Chg By Status, Maintain Status**
Prerequisites	You must have processed a Mass Change.
Access Requirements	Enter a Mass Change Definition and a Template.



Mass Job/Comp Change by Status - Maintain Status page

The system displays the **Template** that you used to create the temporary record and the **Total Row Count** of data rows in the temporary table. The page also displays any data that the mass change process created to update the employee's Job Record.

For your reference, you can also see for each updated job record the mass change record number, the **EmplID** of the affected employee, the employee's **Name,** record number, the current job code, and the effective date for the updated record that you specified when you ran the mass change.

The system displays the Job Record **Action**, the **Reason** for the updated job record, the employee's **Status** and **Type**, whether the employee is full or part time, the company, the **Pay Group**, the job record **SetID, Department ID,** and **Position.**

You can selectively approve each record by going through the list and selecting a **Status** of ***Approved.*** If you want to set another mass change status, select one from the valid values for this field. The database agent doesn't transfer the changes into your live data unless the record has a **Status** of ***Approved***.

If you don't want to review and change the status of each temporary mass change record by hand, you may execute another database agent, Update Mass Change Status Job Temp, that updates the status of the JOB_TMP_MC records.

For more information about mass change database agents that alter the JOB_TMP_MC records, see PeopleSoft Human Resources Mass Change Templates. For more information about executing database agents, see Populating PeopleSoft Human Resources Tables With Mass Change Data.

Populating PeopleSoft Human Resources Tables With Mass Change Data

Now that you have verified that your mass change definition put the desired data in the Temporary Job Table, you are ready to put the new data in your PeopleSoft Human Resources Job Table. To do so, you use a database agent to select the data from the Temporary Job Table and map it into the Job Data pages.

Understanding Database Agents

Database agents are used to update records in your PeopleSoft Human Resources system with many online edits. This process leverages Workflow tools that ensure consistent PeopleCode editing of your records in batch mode. Database agents are only required for processing mass changes that copy data from the Temporary Job Tables into your Human Resources tables.

Post Mass Change to Job –Run Control Page

Usage	Use the Post Mass Change to Job page to post mass changes to the Job Data pages.
Prerequisites	You must have processed a Mass Change.
Access Requirements	Enter a Run Control ID.

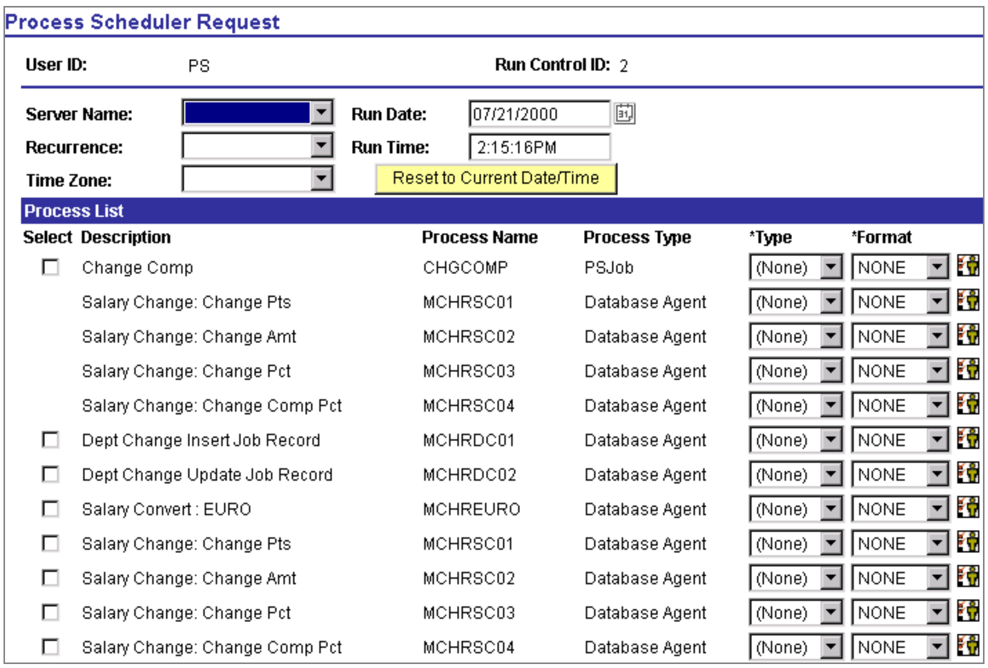
Post Mass Change to Job –Run Control page

Click **Run** to run this request. Process Scheduler runs the Post Mass Change to Job process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Choosing a Database Agent and Transferring Data on the Process Scheduler Request Page

Use the Process Scheduler Request page to select a database agent to transfer the approved mass change records from the Temporary Job file to PeopleSoft Human Resources tables and make any additional Process Scheduler settings.



Process Scheduler Request page

Select a **Process Type** of ***Database Agent*** from the Process List. Depending on the type of mass change you run, you select from the following database agents:

Dept Change Insert Job Record	Use this agent to insert the new department records you created using one of the Dept Change Job templates. The database agent inserts the new row of data based on the As of Date you assigned in the HR Parameters page.
Dept Change Update Job Record	This agent works much the same way as Dept Change Insert Job Record with one exception: Use the Update Record agent to update all future-dated records with the new Department ID.
Salary Change - Change	Use this agent to process a salary mass change based on a

Amount change amount that you specify using any one of the Salary Change Templates. The database agent maps to the Change Amount field on the Job Data 3 page. If your salary change is based on either a percentage increase or compensation rate, you must use one of the other salary mass change database agents. Only one agent is appropriate for any given salary mass change.

Salary Change - Change Percent Use this agent to process a salary mass change based on a change percent that you specify using any one of the Salary Change Templates. This database agent maps to the Change Percent field on the Job Data 3 page. If your salary change is based on either a change amount or compensation rate, you must use one of the other salary mass change database agents. Only one agent is appropriate for any given salary mass change.

Salary Change - Comp Rate Use this agent to process a salary mass change based on a comp rate that you specify using any one of the Salary Change Templates. This database agent maps to the Compensation Rate field on the Job Data 3 page. If your salary change is based on either a percentage increase or change amount, you must use one of the other salary mass change database agents. Only one agent is appropriate for any given salary mass change.

Select the database agent you want to use and click **OK** to run the process and transfer the Temporary Job data into PeopleSoft Human Resources tables.

Checking Mass Changes

If the database agent encounters more than 100 errors while processing the mass changes, it automatically turns itself off and processes an error report. This way you can review the mass change records or modify your mass change definition and regenerate the mass change SQL.

For more information about Process Scheduler, see the Process Scheduler.

Deleting Definitions and Making Changes

Just as you can create definitions and populate tables with data, we provide templates to delete your definitions and empty data from the tables. These give you a way to undo changes, correct errors, and clean up afterwards.

The Delete Mass Change Definition template can be used to delete obsolete mass change definitions. Execution history for the mass change definition remains within the database, but disappears from the online pages.

The Delete Job Temp Mass Change Table template is an easy way to remove mass change data from the Temporary Job Tables, if you examine them and discover that they aren't populated as you intended. You can make some changes to your definition and run the mass change SQR again to repopulate the tables. Use this template to clean house after fully processing a mass change.

For more information about using these templates, see PeopleSoft Human Resources Mass Change Templates.

PeopleSoft Human Resources Mass Change Templates

The following tables describe all mass change templates provided to you as part of PeopleSoft Human Resources. For quick reference regarding PeopleSoft Human Resources mass changes, refer to the chart at the end of this section. The chart groups mass changes by function and purpose, lists the appropriate templates, and points to the required database agent for the mass change to process correctly.

PeopleSoft Mass Changes Overview Chart

Function/Purpose	***Mass Change Template***	***Database Agent (if applicable)***
Dept Change Insert Job Records	Dept Change Insert Job Dept Change Insert Job - Emp Dept Change Insert Job - Emp, Per Dept Change Insert Job - Per	Dept Change Insert Job Records
Dept Change Update Job Records	Dept Change Update Job Dept Change Update Job - Emp Dept Change Update Job - Emp, Per Dept Change Update Job - Per	Dept Change Update Job Record

Salary Change Insert Current Job Records	Salary Change Insert Job Component Salary Change Insert Job Component - Emp Salary Change Insert Job Component - Emp, Per Salary Change Insert Job Component - Per	Salary Change: Comp Rate
Update Mass Change Status	Update MC Status Job Temp	Not Applicable
Delete Temporary Job Mass Change Table	Delete Job Temp Mass Change Table	Not Applicable
Delete Mass Change Definition	Delete Mass Change Definition	Not Applicable
Delete Mass Change Templates	Delete Mass Change Templates	Not Applicable
Delete Mass Change Types	Delete Mass Change Types	Not Applicable
Delete Bank Branch Table	Delete Bank Branch Table	Not Applicable
Delete Bank Table	Delete Bank Table	Not Applicable
Delete Company Credit Card Table	Delete Comp Credit Card Table	Not Applicable
Delete Major Table	Delete Major Table	Not Applicable
Delete Process Definition	Delete Process Definition	Not Applicable
Delete School Table	Delete School Table	Not Applicable
Delete State/Province Table	Delete State/Province Table	Not Applicable
Delete Name Prefix Table	Delete Name Prefix Table	Not Applicable

Templates for Deleting Definitions and Making Changes

Use these templates to perform house-cleaning operations such as deleting specific mass change records and mass change descriptions from the Temporary Job data table. There is also a template provided for you that quickly changes the mass change status of a group of temporary data table records, so that you don't have make these changes manually.

Delete Job Temp Mass Change

General Description	Delete a mass change from the Job Temp Mass Change (JOB_TMP_MC) table. Run this template periodically after you have completed a mass change that inserts records into the Temporary Job Table. Be sure that you verify all steps of the Mass Change before deleting it from this table.
Specific Criteria Field Instructions	You can use any combination of EmplID, M(ass) C(hange) Definition, M(ass) C(hange) Status, and M(ass) C(hange) Template ID to determine which data to delete from the Job Temp Mass Change table. If you leave all of these fields blank, then all data is deleted from JOB_TMP_MC when you process the mass change.
Specific Default Field Instructions	None.
Applicable Database Agents	None.
Specific Data Information	Deletes From JOB_TMP_MC.

Delete Mass Change Definition

General Description	Deletes any data from the mass change tables that is associated with a Mass Change Definition ID that you want deleted. This template doesn't delete any of the history data. History data remains in the database, but isn't visible from the mass change pages.
Specific Criteria Field Instructions	***Warning!*** You should provide either a Mass Change Definition or a Mass Change Template. If you leave both of these fields blank, then all definitions are deleted! Note that if you only choose Mass Change Template, it deletes all Mass Change Definitions associated with that template.
Specific Default Field Instructions	None.
Applicable Database Agents	None.
Specific Data Information	Deletes from all Mass Change tables (except the Mass Change History tables) with MC_DEFN_ID in them.

Deletes from	MC_DEFN MC_DEFN_CRIT MC_DEFN_CRIT_VL MC_DEFN_DEFAULT MC_DEFN_DESCR MC_DEFN_HR MC_DEFN_SQL MC_DEFN_SQL_LN MC_DEFN_STMNT MC_GROUP_LN MC_DEFN_C_LANG MC_DEFN_D_LANG MC_DEFN_LANG

Delete Mass Change Templates

General Description	Asks for a Mass Change Template or Mass Change Type and then deletes from all the Mass Change Template tables, based on either the Template or Type.
Specific Criteria Field Instructions	***Warning!*** You should enter either a Mass Change Template or Mass Change Type. If you don't enter this information, all Mass Change Templates are deleted! If you only choose a Mass Change Type, all templates associated with that type are deleted when you process the mass change.
Specific Default Field Instructions	None.
Applicable Database Agents	None.
Specific Data Information	Deletes Mass Change Templates (including Mass Change Operator Security). Doesn't delete Types or Definitions that might be associated to these Templates. You may choose to delete the Types and Definitions or leave them for future reference.
Delete From	MC_TEMPLATE MC_OPR_SECURITY MC_TEM_CRITERIA MC_TEM_C_LANG MC_TEM_DEFAULTS MC_TEM_DESCR MC_TEM_D_LANG MC_TEM_LANG MC_TEM_STMNT

Delete Mass Change Type

General Description	Asks you for a Mass Change Type and then deletes the data from the Mass Change Type tables, based on the Mass Change Type you indicate.
Specific Criteria Field Instructions	***Warning!*** You should enter a Mass Change Type. If you don't, all Mass Change Types are deleted!
Specific Default Field Instructions	None.
Applicable Database Agent	None.
Specific Data Information	Deletes Mass Change Types. This template doesn't delete Templates or Definitions that might be associated to these Types. You may choose to delete the Templates and Definitions or leave them for future reference.
Deletes from	MC_TYPE MC_TYPE_DESCR MC_TYPE_FIELD MC_TYPE_JOIN MC_TYPE_LANG MC_TYPE_RECORD MC_TYPE_SQL MC_TYPE_STMNT MC_TYPE_WHERE

Update M(ass) C(hange) Status Job Temp

General Description	This enables you to update the mass change status on the JOB_TMP_MC table. This can be useful if you want to approve or error large groups of JOB_TMP_MC records.
Specific Criteria Field Instructions	Update the JOB_TMP_MC records, based on the values that you put in the various criteria fields.
Specific Default Field Instructions	You must provide the new Mass Change Status.
Applicable Database Agents	None.
Specific Data Information	Updates JOB_TMP_MC.

Templates for Deleting Table Data

Use these templates to perform house-cleaning operations like deleting specific data from tables in PeopleSoft Human Resources.

Delete Bank Branch Table

General Description	Asks you for the Transit Number and Branch Clearing Number that you want deleted. The template deletes any data from the BANK_BRANCH_TBL associated with this Credit Card Number. The system saves no historical data.
Specific Criteria Field Instructions	***Warning!*** You should enter the Transit Number and the Branch Clearing Number. If you don't, all data from the BANK_BRANCH_TBL are deleted!
Specific Default Field Instructions	None.
Applicable Database Agents	None.
Deletes from	BANK_BRANCH_TBL BANK_BRANCH_LNG

Delete Bank Table

General Description	Asks you for the Transit Number that you want deleted. The template deletes any data from the BANK_TBL associated with this Transit Number. The system saves no historical data.
Specific Criteria Field Instructions	***Warning!*** You should enter the Transit Number. If you don't, all data in the BANK_TBL are deleted!
Specific Default Field Instructions	None.
Applicable Database Agents	None.
Deletes from	BANK_TBL BANK_TBL_LNG

Delete Comp(any) Credit Card Table

General Description	Asks you for the Company Credit Card Number that you want deleted. The template deletes any data from the COMP_CR_CRD_TBL associated with this Credit Card Number. The system saves no historical data.
Specific Criteria Field Instructions	***Warning!*** You should enter the Company Credit Card Number. If you don't, all data in the COMP_CR_CRD_TBL are deleted when you process the mass change.
Specific Default Field Instructions	None.
Applicable Database Agents	None.
Deletes from	COMP_CR_CRD_TBL

Delete Major Table

General Description	Asks you for the Major Code that you want deleted. The template deletes any data from the MAJOR_TBL associated with this Major Code. The system saves no historical data.
Specific Criteria Field Instructions	***Warning!*** You should enter the Major Code. If you don't, all data are deleted from the MAJOR_TBL.
Specific Default Field Instructions	None.
Applicable Database Agents	None.
Deletes from	MAJOR_TBL MAJOR_TBL_LNG

Delete Process Definition

General Description	Asks you for a Process Type and Process Name to delete. Then it deletes that Process Definition from the Process Scheduler definition tables.
Specific Criteria Field Instructions	***Warning!*** You should enter both the process type and process definition name to delete a specific definition.

If you don't, you could delete all process definitions!

Specific Default Field Instructions	None.
Applicable Database Agent	None.
Delete From	PRCSDEFN PRCSDEFNGRP PRCSDEFNLANG PRCSDEFNPNL PRCSDEFNXFER

Delete School Table

General Description	Asks you for the School Code that you want deleted. The template deletes any data from the SCHOOL_TBL associated with this License/Certification Code. The system saves no historical data.
Specific Criteria Field Instructions	***Warning!*** You should enter the School Code. If you don't, all data in the SCHOOL_TBL are deleted when you process the mass change.
Specific Default Field Instructions	None.
Applicable Database Agents	None.
Deletes from	SCHOOL_TBL SCHOOL_TBL_LNG

Delete State/Province Table

General Description	Asks you for the Country and the State that you want deleted. The template deletes any data from the STATE_NAMES_TBL associated with the Country and State. The system saves no historical data.
Specific Criteria Field Instructions	***Warning!*** You should enter the Country and the State. If you don't, all data in the STATE_NAMES_TBL are deleted!
Specific Default Field	None.

Instructions	
Applicable Database Agents	None.
Deletes from	STATE_NAMES_TBL STATE_NAMES_LNG

Delete Name Prefix Table

Description	This process enables you to delete entries from the Name Prefix Table.
Deletes from	NAME_PREFIX_TBL NAME_PREFIX_LNG

Department Change Templates

Use the following templates to effect mass changes to department records in PeopleSoft Human Resources:

Dept Change Insert Job

General Description	Makes department changes to large groups of employees, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the database agent, Dept Change Insert Job Record. This takes the approved temporary Job records and uses them to insert new Job records for employees with the specified department change.
Specific Criteria Field Instructions	You may select employees based on the various Job record fields. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another mass change with the same template. However, if you leave the criteria field blank, you get a Warning message telling you which fields you left blank.
Specific Default Field Instructions	You must provide the new Department ID. You must enter a valid Action and Action Reason for a department change to occur. You might want

	to try this online first, to make sure the Action and Action Reason are valid for a department change. You must provide the effective date and sequence number for the new Job records. This is the date on which you want the department change to take effect. Try to avoid retroactive department changes; they might cause numerous errors when you use the database agent to insert the new Job records.
Applicable Database Agent	Dept. Change Insert Current Job Records (MCHRDC01)
Specific Data Information	Gets current Job records for employees, based on the mass change As of Effective Date, and inserts them into the Temporary Job Table. Selects from JOB_CUR_MC_VW. Inserts into JOB_TMP_MC.

Dept Change Insert Job - Emp

General Description	Makes department changes to large groups of employees, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the database agent, Dept Change Insert Job Record. This takes the approved temporary Job records and inserts a new Job record for employees with the specified department change.
Specific Criteria Field Instructions	This template enables more complex selection criteria. You may select employees based on the various fields on the Job and Employment data record. If you don't need any of the Employment data as part of your selection criteria, you should use one of the other templates; they run faster. All fields from the Employment record are indicated with (Employment) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another mass change with the same template. However, if you leave the criteria field blank, you get a Warning message telling you which fields you left blank.
Specific Default Field	You must provide the new Department ID.

Instructions	You must enter a valid Action and Action Reason for a department change to occur. You might want to try this online first, to make sure that the Action and Action Reason are valid for a department change. You must provide the effective date and sequence number for the new Job records. This is the date on which you want the department change to take effect. Try to avoid retroactive department changes; they might cause numerous errors when you use the database agent to insert the new Job records.
Applicable Database Agent	Dept. Change Insert Current Job Record (MCHRDC01).
Specific Data Information	Enables you to select current Job records, based on Job, Employment data ,and the mass change As of Date. It then inserts them into the Temporary Job Table. Selects from JOB_CUR_MC_VW, EMPLMT_MC_VW. Inserts into JOB_TMP_MC.

Dept Change Insert Job - Emp, Per

General Description	Makes department changes to large groups of employees, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the database agent, Dept Change Insert Job Record. This takes the approved temporary Job records and uses them to insert new Job records for employees with the specified department change.
Specific Criteria Field Instructions	This template enables more complex selection criteria. You may select employees based on the various fields on the Job, Employment, and Personal Data record. If you don't need any of the Employment or Personal Data as part of your selection criteria, you should use one of the other templates. They run faster. All fields from the Employment record are indicated with (Employment) after the description. Personal Data records are indicated with (Pers Data) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't

	want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another mass change with the same template. However, if you leave the criteria field blank, you get a Warning message telling you which fields you left blank.
Specific Default Field Instructions	You must provide the new Department ID. You must enter a valid Action and Action Reason for a department change to occur. You might want to try this online first, to make sure that the Action and Action Reason are valid for a department change. You must provide the effective date and sequence number for the new Job records. This is the date on which you want the department change to take effect. Try to avoid retroactive department changes; they might cause numerous errors when you use the database agent to insert the new Job records.
Applicable Database Agent	Dept. Change Insert Current Job Records (MCHRDC01)
Specific Data Information	Enables you to select current Job records, based on Job, Employment Data, Personal Data, and the mass change As of Date. It then inserts them into the Temporary Job Table. Selects from JOB_CUR_MC_VW, EMPLMT_MC_VW, PERSONAL_MC_VW. Inserts into JOB_TMP_MC.

Dept Change Insert Job - Per

General Description	Makes department changes to large groups of employees, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the database agent, Dept Change Insert Job Record. This takes the approved temporary Job records and uses them to insert new Job records for employees with the specified department change.
Specific Criteria Field Instructions	This template enables more complex selection criteria. You may select employees based on the various fields on the Job and Personal Data record. If you don't need any of the Personal Data as part of your selection criteria, you should use one of the

	other templates; they run faster. All fields from the Personal Data records are indicated with (Pers Data) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another mass change with the same template. However, if you leave the criteria field blank, you get a Warning message telling you which fields you left blank.
Specific Default Field Instructions	You must provide the new Department ID. You must enter a valid Action and Action Reason for a department change to occur. You might want to try this online first, to make sure that the Action and Action Reason are valid for a department change. You must provide the effective date and sequence number for the new Job records. This is the date on which you want the department change to take effect. Try to avoid retroactive department changes; they might cause numerous errors when you use the database agent to insert the new Job records.
Applicable Database Agent	Dept. Change Insert Current Job Records (MCHRDC01).
Specific Data Information	Enables you to select current Job records, based on Job, Personal data, and the mass change As of Date. It then inserts them into the Temporary Job Table. Selects from JOB_CUR_MC_VW, PERSONAL_MC_VW. Inserts into JOB_TMP_MC.

Department Change Templates—Update

The Update templates work much the same way as the Dept Change Insert Job templates, with one exception. Use the Update templates to update all future-dated records with the new field defaults. These templates ensure that all future-dated records are accurate. For example, you insert a department change dated August 22, 1997; there is a future-dated record for one of the employees affected by the mass change dated November 11, 1997. The update templates update the new department record.

Dept Change Update Job

General Description	Makes department changes to large groups of

	employees, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the database agent Dept Change Update Job Record. This agent takes the approved temporary Job records and uses them to update the existing Job records for employees with the specified department change. The action and reason codes for these records remain as originally set when the Job record was created.
Specific Criteria Field Instructions	This template only includes some of the more likely criteria fields. These fields come from the Job, Employment, and Personal Data records. You may select employees based on these fields. If you don't need any of the Employment or Personal Data as part of your selection criteria, you should use one of the other templates. All fields from the Employment record are indicated with (Employment) after the description. Personal Data records are indicated with (Pers Data) after the description. The Job data fields only have a description.
Specific Default Field Instructions	You must provide the new Department ID.
Applicable Database Agents	Dept Change Update Job Record (MCHRDC02).
Specific Data Information	Gets future Job records, based on the Mass Change As of Date. It then inserts them into the Temporary Job Table. Selects from JOB_FUT_MC_VW. Inserts into JOB_TMP_MC.

Dept Change Update Job - Emp

General Description	This enables you to make department changes to large groups of employees with future-dated Job records, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the database agent, Dept Change Update Job Record. This takes the approved temporary Job records and uses them to update existing future Job records for employees with the

	specified department change. The Action and Reason codes for these records remain as the original intent when the Job record was created.
Specific Criteria Field Instructions	This template enables more complex selection criteria. You may select employees, based on the various fields on the Job and Employment records. If you don't need any of the Employment data as part of your selection criteria, you should use one of the other templates; they run faster. All fields from the Employment record are indicated with (Employment) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another Mass Change with the same template. However, if you leave the criteria field blank, you get a Warning message telling you which fields you left blank.
Specific Default Field Instructions	You must provide the new Department ID.
Applicable Database Agents	Dept Change Update Job Record (MCHRDC02).
Specific Data Information	Gets future Job records for employees, based on the mass change As of Effective Date, and inserts them into the Temporary Job Table. Selects from JOB_FUT_MC_VW, EMPLMT_MC_VW. Inserts into JOB_TMP_MC.

Dept Change Update Job - Emp, Per

General Description	This template enables you to make department changes to large groups of employees with future-dated Job records, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the database agent, Dept Change Update Job Record. This takes the approved temporary Job records and uses them to update existing future Job records for employees with the specified department change. The action and reason codes for these records remain as the original intent

	when the Job record was created.
Specific Criteria Field Instructions	This template enables more complex selection criteria. You may select employees based on the various fields on the Job, Employment, and Personal Data records. If you don't need any of the Employment or Personal Data as part of your selection criteria, you should consider using one of the other templates; they run faster. All fields from the Employment record are indicated with (Employment); Personal Data records are indicated with (Pers Data) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another mass change with the same template. However, if you leave the criteria field blank, you get a Warning message telling you which fields you left blank.
Specific Default Field Instructions	You must provide the new Department ID.
Applicable Database Agents	Dept Change Update Job Record (MCHRDC02).
Specific Data Information	Enables you to select future Job records, based on Job, Employment Data, Personal Data, and the mass change As of Date. It then inserts them into the Temporary Job Table. Selects from JOB_FUT_MC_VW, EMPLMT_MC_VW, PERSONAL_MC_VW. Inserts into JOB_TMP_MC.

Dept Change Update Job - Per

General Description	This enables you to make department changes to large groups of employees with future-dated Job records, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the database agent, Dept Change Update Job Record. This takes the approved temporary Job records and uses them to update existing future Job records for employees with the specified department change. The Action and Reason codes for these records remain as the

	original intent when the Job record was created.
Specific Criteria Field Instructions	This template enables more complex selection criteria. You may select employees based on the various fields on the Job and Personal Data records. If you don't need any of the Personal Data as part of your selection criteria, you should use one of the other templates; they run faster. All fields from the Personal Data records are indicated with (Pers Data) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another mass change with the same template. However, if you leave the criteria field blank, you get a Warning message telling you which fields you left blank.
Specific Default Field Instructions	You must provide the new Department ID.
Applicable Database Agents	Dept Change Update Job Record (MCHRDC02).
Specific Data Information	Enables you to select future Job records, based on Job, Personal data, and the mass change As of Date. It then inserts them into the Temporary Job Table. Selects from JOB_FUT_MC_VW, PERSONAL_MC_VW. Inserts into JOB_TMP_MC.

Salary Change Templates

These templates enable you to perform mass changes on salary records in PeopleSoft Human Resources.

Salary Chg (Change) Insert Job-Component

General Description	This process enables you to make salary changes to large groups of employees, based on specific selection criteria. Employees receiving both multiple- and single-component compensation can be updated by this process. The mass change places the employees' Job and Compensation data in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the application engine process

SAL_CHG, which updates each employee's compensation record.

Then run the appropriate Database Agent for this salary change: Salary Change - Comp Rate. This takes the approved temporary Job records and uses them to insert new Job records for those employees with the specified salary change.

Specific Criteria Field Instructions	You may select employees based on the various fields on the Job and Compensation records. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another Mass Change with the same template. **Note.** If you leave the criteria field blank, the system displays a Warning message telling you which fields you left blank.
Specific Default Field Instructions	Because you can specify a salary change by percent change, amount change, or total compensation amount, you must use only one of those methods of salary change. Delete the default fields that you don't use. You must enter a valid Action Reason for a salary change to occur. You might want to try this online first, to make sure that the Action and Action Reason are valid for a salary change. **Important!** You *must* provide the Effective Date and Sequence Number for the new Job records. This is the date on which you want the salary change to take effect. Try to avoid retroactive department changes; they might cause numerous errors when you use the Database Agent to insert the new Job records. **Note.** If you want to reuse the same Mass Change Definition with the same JOB_EFFDT and JOB_EFFSEQ, but use an updated percent change, amount change, or total compensation amount, you must first run the application engine process to update PS_COMPENSATION and the DBAG to update JOB. Other data that you might want to change during a salary change include Compensation Frequency, Standard Hours, Standard Work Period, Salary Step, and Annual Benefits Base Rate. Delete any of these fields that you don't want to set

	for this Mass Change.
Specific Data Information	This process gets current Job records for employees, based on the Mass Change As of Effective Date, and inserts them into the Temporary Job table.
Application Engine process	SAL_CHG
Applicable Database Agents	Salary Change: Comp Rate - MCHRSC01. Selects from JBCMP_CUR_MC_VW. Inserts into JOBCOMP_TMP_MC.

Sal(ary) Chg (Change) Insert Job Comp-Emp

General Description	This process enables you to make salary changes to large groups of employees, based on specific selection criteria. The process places the employees' Job data in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the application engine process SAL_CHG, which updates each employee's compensation record. Then run the appropriate Database Agent for this salary change: Salary Change - Comp Rate. This application engine process takes the approved temporary Job records and uses them to insert new Job records for those employees with the specified salary change.
Specific Criteria Field Instructions	You may select employees based on the various fields on the Job and Employment record. If you don't need any of the Employment data as part of your selection criteria, you should use the Sal Chg Cur Job: Job template; it runs faster. All fields from the Employment record are indicated with (Employment) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another Mass Change with the same template. **Note.** If you leave the criteria field blank, the system displays a Warning message telling you which fields you left blank.
Specific Default Field	Because you can specify percent change, amount

Instructions	change, or total compensation amount, you must use only one of those methods of salary change. Delete the default fields that you don't use. You must enter a valid Action Reason for a salary change to occur. You might want to try this online first, to make sure that the Action and Action Reason are valid for a salary change. **Important!** You *must* provide the Effective Date and Sequence Number for the new Job records. This is the date on which you want the salary change to take effect. Try to avoid retroactive department changes; they might cause numerous errors when you use the Database Agent to insert the new Job records. **Note.** If you want to reuse the same Mass Change Definition with the same JOB_EFFDT and JOB_EFFSEQ, but use an updated percent change, amount change, or total compensation amount, you must first run the application engine process to update PS_COMPENSATION and the DBAG to update JOB. Other data that you might want to change during a salary change include Compensation Frequency, Standard Hours, Standard Work Period, Salary Step, and Annual Benefits Base Rate. Delete any of these fields that you don't want to set for this Mass Change.
Application Engine Process	SAL_CHG
Applicable Database Agents	Salary Change: Comp Rate - MCHRSC01.
Specific Data Information	The process enables you to select current Job records, based on Job, Employment data, and the Mass Change As of Effective Date, and then inserts them into the Temporary Job table. Selects from JBCMP_CUR_MC_VW, EMPLMT_MC_VW, EMPLOYEES. Inserts into JOBCOMP_TMP_MC.

Sal Chg Ins(ert) Job, Comp, Emp, Per

General Description	This process enables you to make salary changes to large groups of employees, based on specific selection criteria. These employees have their Job data placed in a temporary table for you to review

and approve.

Once you are through reviewing the employee list, you should run the application engine process SAL_CHG, which updates each employee's compensation record. Then run the appropriate Database Agent for this salary change: Salary Change - Comp Rate.

This takes the approved temporary Job records and uses them to insert new Job records for those employees with the specified salary change.

Specific Criteria Field Instructions	You may select employees, based on the various fields on the Job, Employment, and Personal Data records. If you don't need any of the Employment or Personal data as part of your selection criteria, you should use one of the other Salary Change templates; they run faster. All fields from the Employment record are indicated with (Employment) after the description; all fields from the Personal Data records are indicated with (Pers Data) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another Mass Change with the same template. **Note.** If you leave the criteria field blank, the system displays a Warning message telling you which fields you left blank.
Specific Default Field Instructions	Because you can specify a salary change, by percent change, amount change, or total compensation amount, you must use only one of those methods of salary change. Delete the default fields that you don't use. You must enter a valid Action Reason for a salary change to occur. You might want to try this online first, to make sure that the Action and Action Reason are valid for a salary change. **Important!** You *must* provide the Effective Date and Sequence Number for the new Job records. This is the date on which you want the salary change to take effect. Try to avoid retroactive department changes; they might cause numerous errors when you use the Database Agent to insert the new Job records.

	Note. If you want to reuse the same Mass Change Definition with the same JOB_EFFDT and JOB_EFFSEQ, but use an updated percent change, amount change, or total compensation amount, you must first run the application engine process to update PS_COMPENSATION and the DBAG to update JOB. Other data that you might want to change during a salary change include Compensation Frequency, Standard Hours, Standard Work Period, Salary Step, and Annual Benefits Base Rate. Delete any of these fields that you don't want to set for this Mass Change.
Application Engine Process	SAL_CHG
Applicable Database Agents	Salary Change: Comp Rate - MCHRSC01.
Specific Data Information	Enables you to select current Job records, based on Job, Employment data, Personal data, and the Mass Change As of Effective Date, then inserts them into the Temporary Job table. Selects from JBCMP_CUR_MC_VW, EMPLMT_MC_VW, PERSONAL_MC_VW, EMPLOYEES. Inserts into JOBCOMP_TMP_MC.

Sal Chg Ins Job, Comp - Per

General Description	This process enables you to make salary changes to large groups of employees, based on specific selection criteria. The mass change places the employees' Job and Compensation data in a temporary table for you to review and approve. Once you are through reviewing the employee list, you should run the application engine process SAL_CHG, which updates each employee's compensation record. Then, run the appropriate Database Agent for this salary change: Salary Change - Comp Rate. This takes the approved temporary Job records and uses them to insert new Job records for those employees with the specified salary change.
Specific Criteria Field Instructions	You may select employees based on the various fields on the Job, Employment, and Personal Data

records. If you don't need any of the Employment or Personal data as part of your selection criteria, you should use one of the other Salary Change templates; they run faster. All fields from the Employment record are indicated with (Employment) after the description; all fields from the Personal Data records are indicated with (Pers Data) after the description. The Job data fields only have a description. You may delete or leave fields blank, if you don't want to use them for your selection criteria. If you delete one, the only way you can use that field in your selection criteria is to create another Mass Change with the same template.

Note. If you leave the criteria field blank, the system displays a Warning message telling you which fields you left blank.

Specific Default Field Instructions

Because you can specify a salary change by percent change, amount change, or total compensation amount, you must use only one of those methods of salary change. Delete the default fields that you don't use.

You must enter a valid Action Reason for a salary change to occur. You might want to try this online first, to make sure that the Action and Action Reason are valid for a salary change.

Important! You *must* provide the Effective Date and Sequence Number for the new Job records. This is the date on which you want the salary change to take effect. Try to avoid retroactive department changes; they might cause numerous errors when you use the Database Agent to insert the new Job records.

Note. If you want to reuse the same Mass Change Definition with the same JOB_EFFDT and JOB_EFFSEQ, but use an updated percent change, amount change, or total compensation amount, you must first run the application engine process to update PS_COMPENSATION and the DBAG to update JOB.

The list of other data that you might want to change during a salary change includes Compensation Frequency, Standard Hours, Standard Work Period, Salary Step, and Annual Benefits Base Rate.

Delete any of these fields that you don't want to set for this Mass Change.

Application Engine Process	SAL_CHG
Applicable Database Agents	Salary Change: Comp Rate - MCHRSC01.
Specific Data Information	Enables you to select current Job records, based on Job, Employment data, Personal data, and the Mass Change As of Effective Date, then inserts them into the Temporary Job table. Selects from JBCMP_CUR_MC_VW, EMPLMT_MC_VW, PERSONAL_MC_VW, EMPLOYEE. Inserts into JOBCOMP_TMP_MC.

USF Performing Mass Organization Changes

Governmental changes and mandates occasionally require you to make the same organizational change to a large group of your PeopleSoft Human Resources records. For instance, suppose an agency restructuring requires you to transfer a group of employees from the Office of the Director, Budget Division to the Office of the Director, Account Standards Division. Performing this transfer manually would be an onerous and error-prone task. But the Mass Organization Change functionality enables you to select a particular set of employee records from the database, define the alteration you would like to perform on those records, and make those changes in the background, using scheduled processing.

Orchestrating mass changes involves many facets of data management that might require updating or changing all types of data; including employee, departmental, agency, position, location, job, and personal data.

To ensure a smooth transition, PeopleSoft Human Resources for the U.S. Federal Government provides you with a multiple-step process for performing mass organization changes quickly and easily. In this section, we discuss how you can use the system to perform mass organization changes by position or by department, in a sequential series of steps, and how you can even use Navigator maps to walk through the process.

Using the Mass Organization Changes features, you can transfer employees from one department into another department. You can also transfer employees from their positions to other positions within the organizational and reporting structures. In addition, you can set up new departments and positions and then perform the mass transfer of employees into them. Along with handling all the details and variables, you can also be certain that you follow all of the steps, as well as your agency's procedures. In addition, you’re assured of fulfilling the many requirements and standards necessary for every phase of such an encompassing change.

For more information about Mass Change in PeopleSoft applications, see Mass Change.

Before You Begin

To perform mass organization changes, you must first be familiar with PeopleTools Tree Manager. In this section, we assume you already know how to use PeopleTools Tree Manager.

For more information about using the Tree Manager, see Tree Manager.

Understanding Organizational Changes

You might be transferring employees into existing departments or positions or creating new departments or positions, changing the organizational structure, and then transferring the employees into the new, associated departments/positions. You might be merging employees from multiple departments/positions into an existing or new department/position. Each organizational change is a multiple-step process.

Initially, you manually enter some key data to set up the change, following your agency's procedures. You might, for example, need to update the Position Tree and Position Data to reflect new organizational information, such as the Reports To position, dotted line reporting, and location changes. After that, you must set up the parameters to define the type of change and the specific details.

Various types of changes differ in complexity, from those that involve changing simple data to those that involve more complex updates. For example, you might perform a simple mass transfer of employees from one department or position to another. A more complex change might require that the organizational structure is actually changed, but no manager positions or Reports To positions are changed. The most complex change occurs where the organizational structure changes and the manager position and/or reports to position also needs to change.

The two types of mass organization changes are department and position changes. Each type of change requires that you set up the data that defines the change and then run specific processes.

You do all of the steps for some changes, and for other types of changes, you might not need to do each step. For example, if you are creating a new department, hierarchy, or structure, you first create a new department in Tree Manager, then process your change. If you are transferring employees from one department to another existing department, you don't need to create a new department.

All actions that are processed by the Mass Organization Change SQR are assumed to have already been approved by your agency and are pushed into the system as if they were entered through HR processing/update menu item. Mass changes affect a large number of rows of data in the system, which makes this a powerful tool. For these reasons, you must give careful consideration to who in your organization is allowed to perform mass organizational changes.

If you are performing several different mass change operations, assigning each a unique Mass Organization Change ID helps you to retain and identify all of them. You may group them together when setting up your run process, as we shall see when we look at the process pages.

Using the System's Step-by-Step Procedures

You perform mass organization changes using a series of steps. Using the data you supply, the system makes the designated changes for you. You can run mass organization changes for departmental changes or position changes. The overall series of steps is similar for both types of changes. First, you enter your Mass Organization Change instructions into a setup page. Then you check your department or position tree data, as appropriate. Then, depending on the type of change, you choose the processes you want to run. After you run the processes, you can print a report to check the results.

Here are summaries of the steps to perform mass organization changes for departments and positions.

To perform mass organization changes for departments:

1. Set up mass organization change data.

In this step, you set up Mass Organization Change data; such as the type of change (by Department or Position), the effective date for the change, NOA and authority codes/descriptions, and the actual change information that identifies which departments/positions are being mass changed into the new existing department/position. You do this on the Setup Mass Organization Change page.

2. Create a new department or changing a department.

If you are creating a new department or a changing the organizational structure for an existing department, update the Department Table in the Department Tree structure in the Tree Manager or the organizational structure in the Department Table. This step is done only when creating a new department or changing the department hierarchy.

3. Recreate the Departmental Security Tree.

You recreate the Departmental Security Tree by running SQR PER505 using the Security Administration page. This revalidates the Tree Table. Use only if the Security Tree was changed.

4. Recreate the Departmental Hierarchy information about the Department Table.

You recreate the departmental hierarchy information about the Department Table by running the SQR FGHR006 using the Build Department Organization page. Use only if the Security Tree was changed.

5. Generate mass organization change data.

Use the SQR process FGHR030 from the Apply MOC page to generate Mass Organization Changes based on Mass Organization Change data setup. This determines the affected employees in the departments and inserts new rows of data in GVT_JOB.

To perform mass organization changes for positions:

1. Set up mass organization change data.

In this step, you set up Mass Organization Change data; such as the type of change (by Department or Position), the effective date for the change, NOA and authority codes/descriptions, and the actual change information that identifies which departments/positions are being mass changed into the new existing department/position. You do this on the Setup Mass Organization Change page.

2. Update any existing positions.

Update any existing positions with the new organizational information/structure. This can be done from the Department Position Tree in Tree Manager in the same way you update Departments.

3. Rebuild the Position Tree and/or Position Structure.

If positions are changed, then rebuild the Position Tree with the new reporting relationships by using Build Position Structure page to run the SQR POS006A.

4. Generate mass organization change data.

Use the Apply MOC page to run the SQR FGHR030, which generates Mass Organization Changes, based on your Mass Organization Change data setup. This determines affected employees in departments and inserts new rows of data in GVT_JOB.

5. Print the descriptions and/or notices.

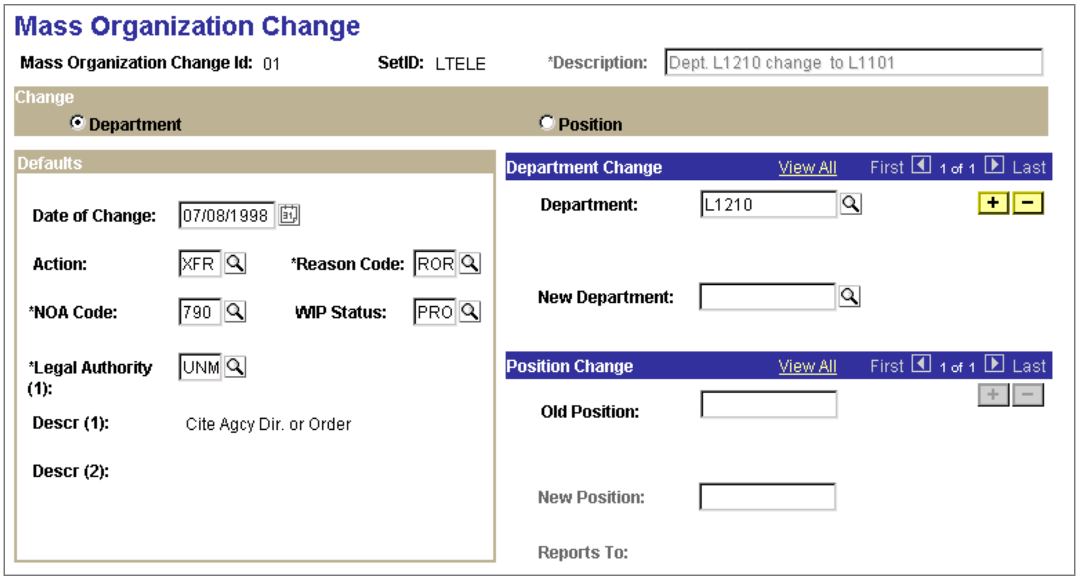
Print the necessary Position Descriptions using the SQR Process FGOF8. Run a few random reports from this to test and verify the changes that were performed.

Performing Mass Organization Changes for Departments

Here is a more detailed look at the pages you use to process mass organization changes.

Setup Mass Organization Change Page

Usage	Use the Setup Mass Organization Change page to define mass changes.
Object Name	GVT_MOC_DATA
Navigation	**Administer Workforce, Mass Organization Changes USF, Setup, Setup Mass Organization Change, Mass Organizational Change**
Prerequisites	None.
Access Requirements	Enter a Mass Organization Change ID and a SetID.



Setup Mass Organization Change page

In the **Mass Organization Changes** group box, enter a name or description of the change in the field for Mass Organization Change Id**.** Indicate if the **Change** is for a **Department** or a **Position.**

In the **Defaults** group box, enter the **Date of Change.** Specify the **Action** and the **Reason Code**. Enter the **NOA Code.**

Select the **WIP** (Work-in-progress) **Status** from the available options.

Specify the **Legal Authority (1)**. This is mandatory and must be entered to perform the Mass Organization Change. Otherwise, the processes don't work.

Type **Descr(iption) (1)** and **Descr(iption) (2)** in the spaces provided.

If this is for a department change, indicate the **Department** and **New Department**. You may enter more than one department, if you are merging two into one new department.

In the **Position Change** group box indicate the **Old Position.** When you select the **Position** radio button, the **New** and **Reports To** boxes are active, and you can then specify those. You may enter more than one position, if you are merging two into one new position.

Creating a New Department or Changing a Department

If you are creating a new department or are changing the organizational structure for an existing department, update the Department Table in the HR Department Tree structure or the organizational structure in the Department Table. (This step is done only when creating a new department or changing the department hierarchy.

If you make changes to the Security Tree, you need to update the tree using the Security Administration page.

For more information about using the Tree Manager to update the Department Table, see Building and Modifying Security Trees.

Updating Existing Positions

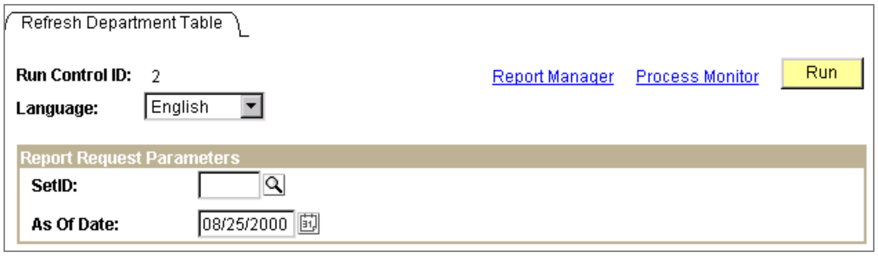
Use the Tree Manager to update the Position Tree with any changes to the organizational position structure. Open **Tree Manager.** Then drill down to the HR: Position tree. When you click any node in the Position tree, the Position Data component opens, and you can update the Position tree.

Use the Build Position Structure page to rebuild the Position Tree, if you modified positions and the organizational position structure.

For more information about updating the Position Data in your system using the Tree Manager and the Position Tree, see Maintaining Position Hierarchies in the Tree Manager.

Build Department Organization - Refresh Department Table Page

Usage	Use the Refresh Department Table Page to recreate the departmental hierarchy information about the Department Table, if you made changes to the Security Tree.
Object Name	RUNCTL_FGHR006
Navigation	• **Administer Workforce, Administer Workforce (USF), Process, As-of-Date Request, Refresh Department Table** • **Define Business Rules, Manage Human Resources (USF), Process, Build Department Organization, Refresh Department Table** • **Administer Workforce, Mass Organization Changes USF, Process, Build Department Organization, Refresh Department Table**
Prerequisites	None
Access Requirements	Enter a Run Control ID.



Build Department Organization - Refresh Department Table page

Language Select the appropriate language for the process.

Report Request Parameters

SetID Select the **Set ID** of the Department Table you are refreshing.

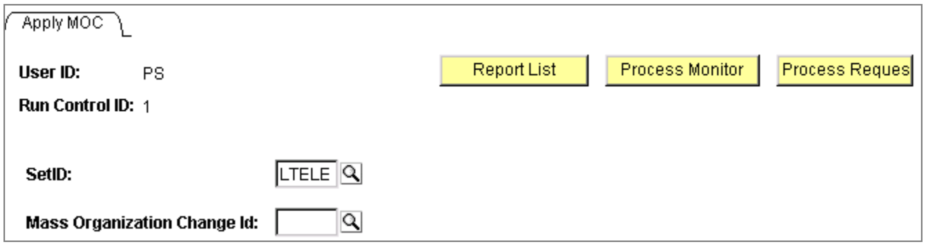
As Of Date Select the date as of which you want the Department Table updated.

Click **Run** to run this request. Process Scheduler runs the Refresh Department Table process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Apply MOC Page

Usage	Use the MOC Apply page to run the SQR process FHGR030 to generate mass organization changes to your system data, based on the information you entered in the Setup Mass Organization Change page.
Object Name	RUNCTL_GVT_MASSORG
Navigation	**Administer Workforce, Mass Organization Changes USF, Process, Apply MOC, Apply MOC**
Prerequisites	You must have entered mass change information in the Setup Mass Organization Change page.
Access Requirements	Enter a Run Control ID.



Apply MOC page

SetID

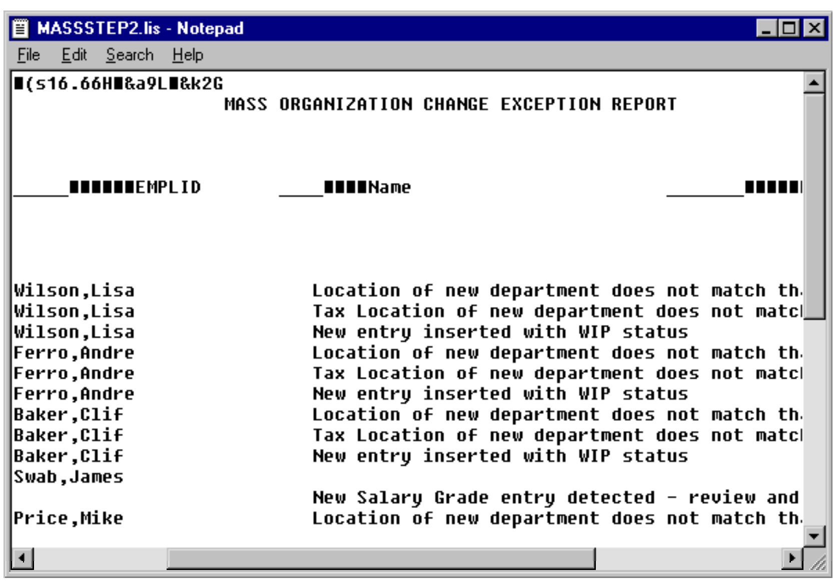
Select the **SetID** of the departments that are affected by the organization changes you set up in the Setup Mass Organization Change page.

Mass Organization Change Id

Select the ID of the mass organization change you want to process. You set up **Mass Organization Change Ids** on the Setup Mass Organization Change page.

This process determines the affected employees in your departments and inserts new rows of data in GVT_JOB. An exception list file (.lis) file is also generated by the system and placed in the C:\Temp directory, which records the action for each employee. You can view the exception list file using Microsoft Notepad or Wordpad to see if there are discrepancies for any rows of data for any of the employees updated by the process. You can then correct any discrepancies by entering them directly into the employee's Job pages.

Apply MOC Exceptions In Notepad



Exception List File From SQR Process FGHR030 Viewed in Notepad

CHAPTER 10

Using Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve several steps and several people working together. When you hire an employee using PeopleSoft Human Resources, for example, you are really starting a process involving several different individuals: Someone signs up the employee for benefits, someone else reviews and approves equipment requisitions, and a third person enters tax information for payroll. Workflow encompasses this larger process. Use Workflow to streamline processes, save time, improve efficiency, and increase your reporting options.

Although we've built workflow into PeopleSoft Human Resources and other PeopleSoft applications, PeopleSoft Workflow is not limited to those processes. They are just examples to give you an idea of the possibilities. We provide you with the tools you need to automate and fully configure your business processes through workflow. You use Workflow Administrator and Maintain Security along with Application Designer to modify workflow built into your PeopleSoft applications and to define new workflow processes.

Workflow tools help you build the larger process into your information system. You use them to tie together the individual steps so that the system can help coordinate the activities. Because the system has the entire process defined and knows what you are trying to accomplish, it can automatically start the next step in the flow of work.

Before You Begin

This section provides an overview of Workflow in PeopleSoft HRMS. It is not a thorough discussion of workflow.

For more information on workflow and designing your own workflow maps in PeopleSoft HRMS, see PeopleSoft Workflow.

The procedures for accessing and entering information in these pages mirror those for updating any PeopleSoft page.

For more information and a quick refresher course, see the general tutorial in Using PeopleSoft 8 Applications.

Remember that you can access PeopleBooks Help at any time to review online information that describes the purpose of these pages.

Components of Workflow

A workflow is comprised of the three Rs: Rules, Roles, and Routings. All three components work together to ensure that your organization's business processes are followed, that appropriate actions are taken in a timely manner in response to an event, and that the right individuals in your organization get involved in the process. All of this completed automatically behind the scenes.

Rules

Rules are your company's business practices captured in software. Rules determine when to trigger a business event. For example, the Hire Employee business event only triggers when a new employee is hired; it doesn't trigger if the person you are adding to the database is a Time and Labor contractor.

In most organizations, the rules are contained in policies and procedures documents. By incorporating the rules into the software, you ensure that people are following them, without requiring extra work on their part.

Roles

Roles describe how people fit into the workflow. A role is a class of users who perform the same type of work, such as clerks or managers.

Roles define the type of person to perform the work instead of the individuals performing the work. Identifying roles instead of individual users makes your workflow more flexible and easier to maintain. Roles remain stable even as people change jobs.

For example, your payroll manager must enter certain information for new hires in the system. It doesn't matter who is currently the payroll manager; it's just the person who enters the data. In addition, if that person is on vacation, using workflow you can automatically–but temporarily–route that person's tasks to the substitute.

Routings

Routings connect information to people. They are the system's means of moving information from one place to another. Routings specify where the information goes and what form it takes: email message, electronic form, or worklist entry.

Routings create the flow in workflow. The network of routings creates a business process from what used to be isolated activities. They get the right information to the right people at the right time, enabling users to work together to accomplish the company's goals.

Designing the Three Rs of Workflow

You use Application Designer and PeopleSoft Security to define the three Rs of workflow: rules, roles, and routings. You define roles through PeopleSoft Security. You define rules and routings in Application Designer as you draw your workflow maps.

Using Workflow in Your HRMS Business Processes

You don't have to use separate tools to create workflow. When you implement workflow, you consider three things: rules, roles, and routings. As you create your business process maps, you simply choose a routing from the Activity palette. Before you design or modify workflow routings for the first time, you use PeopleSoft Security to define your roles.

While several workflow business processes are delivered with your HRMS system, the system is delivered with all workflow turned off. You must activate it to use it.

For more information about activating workflow in your system, Activating Workflow.

You'll use Workflow Administrator to access, monitor, and analyze workflow in your organization. Using PeopleSoft Security, you can add or modify role and role user information. You can also use it to maintain the relationship between roles and role users.

For more information on how to use Workflow Administrator, see PeopleSoft Workflow. For more information on how to handle roles and role users, see Security.

Setting Up Workflow Roles and Role Users

When you implement workflow in PeopleSoft HRMS for the first time, you must identify those individuals who will perform, or those positions from which will be performed, the roles called for in the workflow processes. These individuals are called role users. For example, the Hire Employee workflow refers to a role called Benefits Administrator. Until you assign a role user to act as the Benefits Administrator, there is no one to whom to send an email and no user to work a worklist.

Determining Role Users

Because any individual in your organization with an email address is a potential role user, we recommend that you enter all of your employees as workflow role users and assign each of them a User ID. While some workflow processes may involve only a few administrators and supervisors, other processes, like the Process Employees with Late Reviews and Update Mailing Address workflows, will involve almost every employee in your organization at one time or another.

You do not necessarily have to grant all users access to workflow processes.

Once you assign role users to roles, any workflow process that references that role will send emails and worklists to those designated role users. Both the Hire and Terminate Employee workflows reference the Benefits Administrator role. Any role users assigned to that role will receive an email when either workflow runs.

For any emails, forms, or worklists to be generated, you must designate the appropriate Email ID, Form ID, and User ID for each role user. Without this information, the workflow process can't create electronic forms or worklists.

For more information on creating User IDs and specifying to roles, see Security.

Here is a partial list of the administrator roles that we include in PeopleSoft HRMS:

- MIS Administrator
- Benefits Administrator
- Facilities Administrator
- Payroll Administrator
- Training Administrator
- Personnel Administrator
- Worklist Administrator

Creating Role Users Using a Message Agent

While you could enter each employee in turn as a role user in the Role User and IDs page, this process could be tedious if you're designating many employees as users. Workflow processes like Process Employees with Late Reviews and Update Employee Addresses could involve every individual in your organization at one time or another. There is a much faster way to transform your employees into workflow role users. PeopleSoft HRMS includes a special message agent that enters all your active employees as Role Users automatically.

For more information on specifying roles for User IDs, see Security.

Choosing a Supervisor Role Query Option

While the number of roles that you can use and define in your workflow processes is limited only by your own organization's business needs, one of the most frequently used and most important roles in workflow is that of the Supervisor (or Administrator). Role users assigned the role of Supervisor are included in worklist, email, and electronic form routings and are often involved in many employee workflow routings. Since the Supervisor role is often so important, it is vital to maintain accurate data about those in your organization who are acting as supervisor, and who in your organization reports to these supervisors.

There are two ways to assign and maintain the Supervisor-role-to-role-user relationship in PeopleSoft HRMS. You can use the User Profiles component in PeopleSoft Security, or you can use one of the dynamic Role User Queries in PeopleSoft HRMS to query your live system when the Supervisor role is involved in a workflow.

Using the User Profiles Table

You can use the User Profiles – Workflow page in PeopleSoft Security to manually define supervisor roles, using the Supervising Role User field. Choosing to maintain the Supervisor role this way requires that you maintain your supervisor data not only in your HRMS database where it naturally resides, but also in the User Profiles table. The data in the User Profiles table is only as accurate as the last time you updated your supervisor role users in the table. The PeopleTools Role User Query does not go against your live human resources database, but rather the Role User Table.

All generic PeopleTools workflows are set to use the PeopleTools Role User Query.

If you select the **HR Installed** check box on the Workflow System Defaults page, the Supervising Role User field on the User Profiles – Workflow page doesn't display.

For more information on the **HR Installed** check box option, see Activating Workflow. For more information on the User Profiles component, see Security.

Using the Dynamic Role User Queries

The alternative is to use one of three dynamic SQRs that query your live human resources database when a workflow involving a Supervisor role is triggered. You select and assign one of these role user queries 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 different role queries from which you can choose. Select the one appropriate to your human resources implementation.

Use this Query	***If you're using***
[ROLE] Supervisor-Full Posn Mgt	Full Position Management
[ROLE] Supervisor-No Posn Mgt	Position Management turned off
[ROLE] Supervisor-Part Posn Mgt	Partial Position Management

This method ensures that the workflow role user supervisor 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 with your human resources system and the other in the Role User Table.

We deliver all HRMS workflows using the [ROLE] Supervisor-Part Posn Mgt Role User Query. All generic PeopleTools workflows use the PeopleTools Role User Query. To use one of the other human resources Supervisor Role User Queries in workflow, you must modify all routings involving supervisors to use the appropriate role query.

For more information on routing in your system, see PeopleSoft Workflow. For more information on activating workflow in your HRMS system and activating the dynamic Role User Query option, see Activating Workflow.

Setting Up Routing Data

Routings determine the method by which data (work) flows from one step or person in a process to another (flow): workflow. Routing is the flow in workflow.

For more information about setting up routing for workflow components, see PeopleSoft Workflow.

Activating Workflow

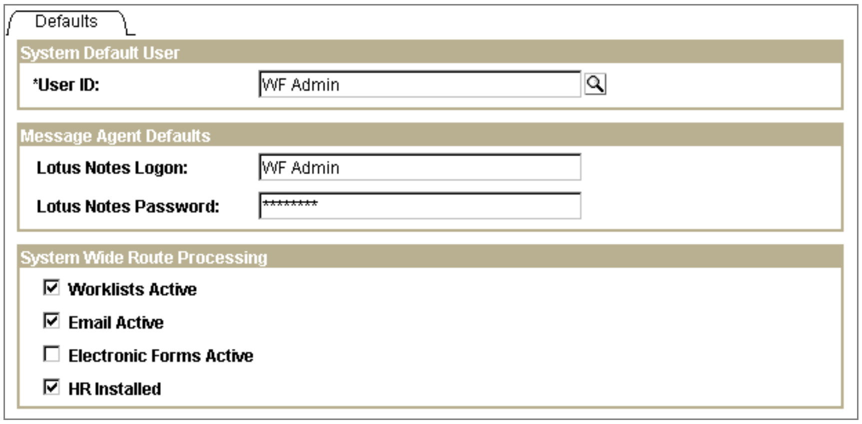
Your PeopleSoft HRMS system includes several workflow processes that are triggered by business events that occur while you work in your HRMS system. Because these workflows require a certain amount of setup and modification on your part, they are delivered to you deactivated. For example, before you can use the Hire Employee Workflow, you'll need to assign User IDs to the Benefits Administrator, Personnel Administrator, and Training Administrator roles (among others) that the workflow references when it delivers worklists and email routings.

For more information on activating, maintaining, and deactivating your workflows, see PeopleSoft Workflow.

Workflow System Defaults Page

Usage	Use Workflow System Defaults page to activate the workflows that are part of your HRMS system.
Navigation	**PeopleTools, Workflow Administrator, Use, Workflow System Defaults**

Prerequisites	Workflows must be set up and roles and roles need to be assigned User IDs.
Access Requirements	None.



Workflow System Defaults page

Select all the **System Wide Route Processing** options to make **Worklists Active, Email Active,** and **Electronic Forms Active** and to activate all workflow processes within your system. You don't have to select all the options.

Keep in mind that these options have a system-wide impact.

For more information on deactivating specific workflow events, see Deactivating Specific Workflow Events.

Also, if you plan to use the installed PeopleSoft HRMS dynamic Role User Query, select the **HR Installed** check box. If you do not select this option, then you use the User Profiles component in PeopleSoft Security to maintain supervisor information for your role users. If you select the **HR Installed** check box, the Supervising Role User field on the Role User Maintenance page does not display.

For more information about the dynamic Role User Query in PeopleSoft HRMS, see Using the Dynamic Role User Queries.

Deactivating Specific Workflow Events

If you want to use workflow generally in your PeopleSoft HRMS system, but want to turn off particular workflows or workflow events, the built-in flexibility of PeopleTools enables you to do this easily. Using Application Designer, you can make specific workflow events inactive within the Event Definition.

Important! Although we deliver PeopleSoft HRMS with system wide routings off, all events are active.

For more information about deactivating workflow events, or designing, modifying, or accessing button definitions in Application Designer, see PeopleSoft Workflow.

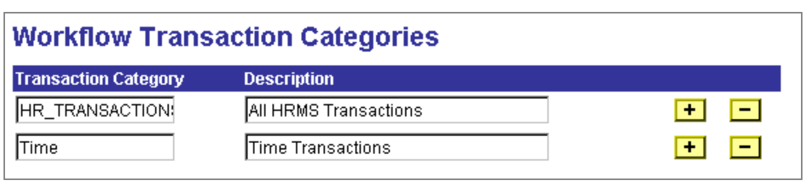
Setting Up Workflow Approval Functionality

The functionality of workflow approval processing is based on specific rules, which are defined by three setup pages. These pages are Workflow Transaction Categories, Workflow Transactions, and System Workflow Rules.

Following the setup of those pages, you'll use another set of pages–Workflow Status and Workflow User Preferences–to set up approvals processing for self-service transactions.

Workflow Transaction Categories Page

Usage	Use the Workflow Transaction Categories page to describe the categories in which transactions can be placed.
Object Name	EO_TRAN_CATS
Navigation	**Define Business Rules, Define General Options, Setup, Workflow Categories**



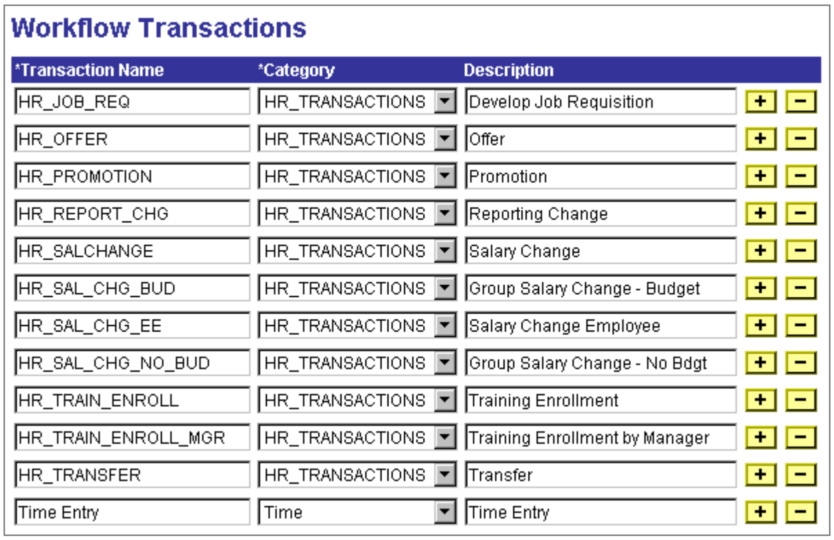
Workflow Transaction Categories page

The data is comprised of the name of the **Transaction Category** and its **Description.**

This data is "system data" and is shipped with the database. You'll define rules for given categories with the System Workflow Rules page.

Workflow Transactions Page

Usage	Use the Workflow Transactions page to describe the transactions and the categories in which they belong.
Object Name	EO_TRANSACTIONS
Navigation	**Define Business Rules, Define General Options, Setup, Workflow Transactions**



Workflow Transactions

*Transaction Name	*Category	Description
HR_JOB_REQ	HR_TRANSACTIONS	Develop Job Requisition
HR_OFFER	HR_TRANSACTIONS	Offer
HR_PROMOTION	HR_TRANSACTIONS	Promotion
HR_REPORT_CHG	HR_TRANSACTIONS	Reporting Change
HR_SALCHANGE	HR_TRANSACTIONS	Salary Change
HR_SAL_CHG_BUD	HR_TRANSACTIONS	Group Salary Change - Budget
HR_SAL_CHG_EE	HR_TRANSACTIONS	Salary Change Employee
HR_SAL_CHG_NO_BUD	HR_TRANSACTIONS	Group Salary Change - No Bdgt
HR_TRAIN_ENROLL	HR_TRANSACTIONS	Training Enrollment
HR_TRAIN_ENROLL_MGR	HR_TRANSACTIONS	Training Enrollment by Manager
HR_TRANSFER	HR_TRANSACTIONS	Transfer
Time Entry	Time	Time Entry

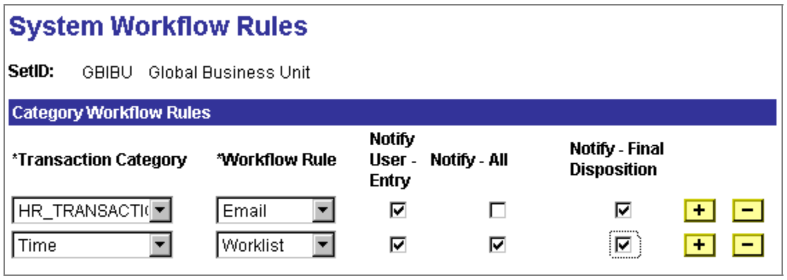
Workflow Transactions page

Workflow Transactions enables you to match each transaction with a transaction category by entering a **Transaction Name** and choosing an appropriate **Category.** You can enter a description of each transaction in the **Description** column. Categories are defined in the Workflow Transaction Categories page.

We ship a set of workflow transaction definitions as system data with the database.

System Workflow Rules Page

Usage	Use the System Workflow Rules page to define the processing rules for a category of transactions.
Object Name	EO_SYS_WF_RULES
Navigation	**Define Business Rules, Define General Options, Setup, Workflow System Rules**
Access Requirements	SetID



System Workflow Rules page

You can specify these rules at a SETID level in order for different rules to exist for different business units.

Note. You are required to specify this information when you implement your PeopleSoft HRMS system.

Transaction Category Enter a transaction category. You can define transaction categories on the Workflow Transaction Categories page.

Workflow Rule Use Workflow Rule to define how the system will notify users when they're required to perform a function. For example, you can define that the system should use email to notify managers when a training request needs their approval. Possible values include:

Email. Notify the user via email.

Worklist. Notify the user by placing an entry on the users worklist.

Both. Notify by both email and worklist.

None. No notification.

User. Enable the user to define their preference. In this case, the user will take advantage of the Workflow User Preferences page to specify their preferences.

Notify User –Entry Select **Notify User - Entry** to indicate that users should get a confirmation when they initiate a transaction. For example, a user enters a training request and gets a confirmation email that announces it's been entered.

Notify All Select **Notify All** to indicate that users get notified when someone processes their transactions. For example, if three approvers are necessary to complete a transaction, the user will get an email each time the transaction is passed on to the next approver in the queue.

Notify –Final disposition	Select **Notify –Final Disposition** to indicate that users should only be notified when all approvers have made a decision regarding their request.

Setting Up Workflow Approvals for Self-Service Transactions

You'll set up workflow for your self-service transactions in much the same way that you do for other workflow processes. Any set of transactions involving approvals, where requests are submitted and in turn approved or denied, will involve approvals workflow.

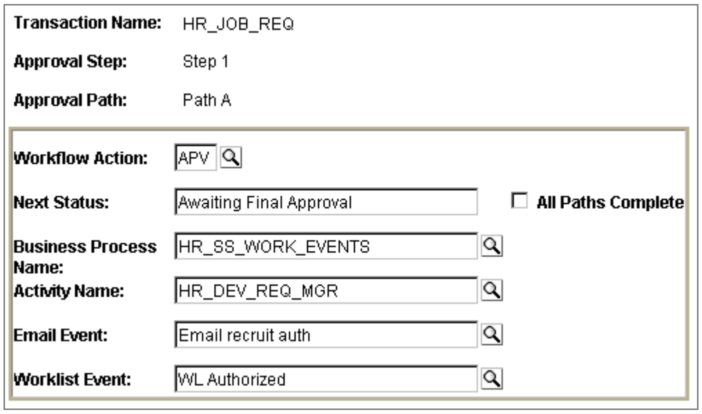
If you would like full workflow notification to occur as part of the processing of the information entered in a particular set of transactions, at a minimum, you must activate workflow emails and worklists for these transactions. Additionally, you'll need to arrange for each originating participant in the transaction (for example, some eRecruitment transactions involve managers, authorizers, and recruiters), to receive worklists and emails, as well as valid email addresses.

Once you've set up an approval workflow for a self-service transaction, you can easily modify it without going into PeopleTools by using the Workflow Status table. The Workflow Status table enables you update and change approval paths for a particular transaction.

In addition, we provide a Workflow User Preferences page that enables employees who are involved in approvals workflow processes to determine for themselves whether they receive workflow notifications by worklist, email, or both worklist and email.

Workflow Status Page

Usage	Use the Workflow Status page to add, subtract, or change workflow approval paths for self-service transactions that involve the submitting, approval, and denial of requests.
Object Name	HR_WF_STATUS
Navigation	**Define Business Rules, Administer HR System, Setup, Workflow Status, Hr Wf Status**
Prerequisites	None
Access Requirements	Select a Transaction Name. You can search on Approval Path, Approval Step, Next Status, Transaction Name, or Workflow Action**.**



Workflow Status page

Transaction Name
The system displays the system name of the transaction.

Approval Step
Lists the approval step which you are dealing with. All approval workflows are made up of a series of steps.

Approval Path
Lists the approval path within the approval step. Approval steps can contain multiple parallel paths.

Workflow Action
Describes the workflow action associated with this Approval step/path combination. Possible workflow actions include ***SUB*** (Submitted), ***APV*** (Approved), and ***DNY*** (Denied).

Next Status
Displays the status message that will appear in the "current status" section of transactions involving approval workflow when a workflow approval reaches the selected step. If you leave this field blank, no message will display when the role user reaches this step.

All Paths Complete
When you select **All Paths Complete**, the system will only display the **Next Status** text if all role users involved in this path have completed this step.

Business Process Name
Indicates the business process in which the approval transaction events reside. The system gets the Business Process Name from the Business Process Table.

Activity Name
Indicates the activity in which the approval transaction events reside

Email Event
Displays the type of email event (if any) that takes place when this approval step and path is completed, for role users who receive email workflow notices.

Worklist Event
Displays the type of worklist event (if any) that takes place when this approval step and path is completed, for role users who use workflow worklists.

Understanding Self-Service Transaction Approvals Workflow

All transactions that contain approval workflow have a similar look and feel. The bottom of the transaction page contains a status area that will list each approver and the status of each approval action. When the user is in Add mode, the system hides this status area. The reason for this is that the system has not filled in the application data and therefore it is not possible to determine the identity of the reviewers.

A transaction page involving approval workflow will also have a submit button which will save the page and initiate the workflow. Once the user submits this information into workflow, the system will list all of the role users who will be reviewing the transaction (for example, an employee/applicant, a manager, and a training administrator) in the status area. Workflow will then send an email or worklist item to the first role user who needs to review the transaction.

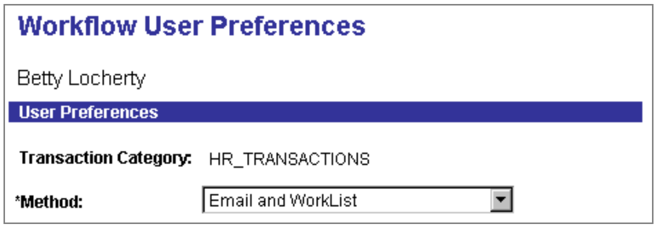
An approver can find the transaction in several ways. You can arrange for the approver to receive email notifying them that they have an approval decision to make for a self-service transaction, and this email will contain a link to the transaction. If you arrange for the approver to receive notification via the worklist, they can click on the worklist item to navigate to the transaction. Alternatively, the user can find all of the transactions requiring their approval through the menu. For example, if a user has menu security for the Approve Job Requisitions transaction, they will be able to view a menu item for it. When the user clicks on the menu item, they will receive a list of requisitions that require their approval. Clicking on one item in the list will display the detail behind the item.

When an approver enters a transaction that requires approval, the detailed transaction information may be display only or updateable based on the transaction. If the transaction is updateable, the system will display a save button that enables the approver to save the information that they change without advancing the transaction through the workflow process. Whether the transaction is updateable or not the approver will have the ability to approve, deny or put the transaction on hold. Denying the transaction or putting it on hold ends the workflow process by changing the status of the overall transaction. Approving the transaction may change the status of the overall transaction or it may simply move the transaction to the next phase of the workflow process. The approver may enter comments describing their reasoning for approving, denying or putting the transaction on hold in the Action section of the page. Click any of the buttons to update the status section of the page.

Workflow User Preferences Page

Usage	Employees who are involved in workflow approvals notifications can come to this page to determine how they'd like to receive workflow notifications for self-service workflow transactions.
Object Name	HR_SS_WF_EE_PREF
Navigation	**Self Service, Employee, Profile, Workflow User Preferences, SS WF User Preferences**
Prerequisites	A Workflow Rule of User must be in place for the workflow user's SetID on the System Workflow Rules page for the user to have access to Workflow User Preferences.
Access	User must be set up to receive workflow.

Requirements	



Workflow User Preferences page

The employee can update their current workflow notification method by selecting a different Method value and clicking the Save button. The workflow notification methods available are ***Email, Worklist*** and ***Email and Worklist.***

Employees will only have access to this page if a **Workflow Rule** of ***User*** was set up for their business unit and the set of transactions they use on the System Workflow Rules page.

Workflow Business Processes in PeopleSoft Human Resources

This section discusses each workflow business process, explains how each process executes, and points out any special setup considerations that you should consider when using the workflow for the first time.

For more information on designing and creating your own workflow, or for detailed instructions on modifying your PeopleSoft Human Resources workflow business processes, see PeopleSoft Workflow.

Using Workflow Maps to Understand Workflow

When you design a workflow in PeopleSoft Human Resources using Application Designer, you create a map for your business process using buttons. These maps give you a full workflow overview at a glance, detailing your organization's business processes, identifying events that trigger a workflow, and specifying roles for notifying, reviewing, and approving workflow events. We include a Process Flow diagram for each Human Resources Workflow business process we include as part of your Human Resources system.

Reading PeopleSoft Process Flow Diagrams

Application Designer gives you a graphical mapping of all of your organization's business processes and any related workflows. To see what's happening in any PeopleSoft workflow, all you need do is find and view it in Application Designer.

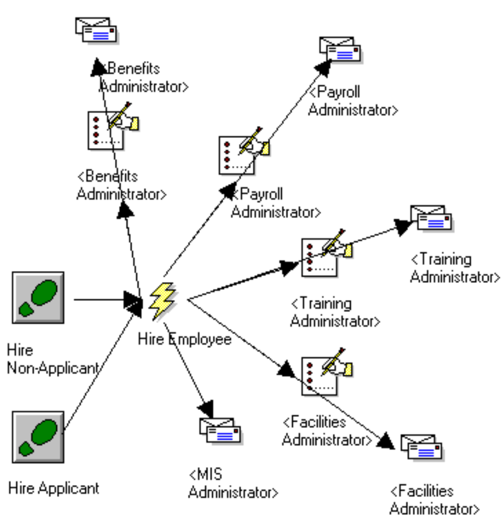
For more information on designing, modifying, or accessing maps in Application Designer, see PeopleSoft Workflow.

The following headings discuss the workflows included in PeopleSoft Human Resources. For your reference, we detail each of the three Rs of workflow and provide the related workflow business process map for each workflow we discuss.

Using Workflow to Hire Employees

Hiring employees can be a time-consuming process involving several individuals in different parts of your organization. One person hires the employee into your PeopleSoft Human Resources system; another signs up the employee for benefits; and someone in payroll gathers the appropriate information to ensure the new hire gets paid. Someone else may sign up the employee for introductory training and orientation. There are emails to send and forms to fill out.

With the Hire Employee workflow process, your PeopleSoft Human Resources system handles these work items for you automatically. You hire an employee into PeopleSoft Human Resources. Workflow takes over from there, completing the process behind the scenes. The following diagram illustrates the Hire Employee workflow process.



The Hire Employee Activity

Where to Find the Workflow

Activity	Hire Employee
Event	Hire Employee

Business Process Map(s) The Hire Employee activity is in both the Administer Workforce and the Recruit Workforce business process maps in Human Resources.

The Three Rs of Hiring an Employee

We've broken down the Hire Employee workflow into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

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.

Roles

Once rules are established, they direct the system to send notification about the new hire to roles within the organization. The roles in the Hire Employees workflow are as follows:

- Benefits Administrator
- Payroll Administrator
- MIS Administrator
- Training Administrator
- Facilities Manager

While different or even multiple individuals in your organization may play these roles, the roles themselves must be assigned to an individual role user if the rules and routings are to be followed.

Routings

The workflow performs the following routings:

Role	***Email Sent***	***Worklists Generated***
Benefits Administrator	Yes	Yes. The system directs the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire.
Payroll Administrator	Yes	Yes. The system directs the Payroll Administrator to the Update Deduction Data activity for the new hire.
MIS Administrator	Yes	No.

Facilities Administrator	Yes	Yes. The system directs the Facilities Administrator to the Company Property pages to issue the appropriate company property to the new hire.
Training Administrator	Yes	Yes. The system directs the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes.

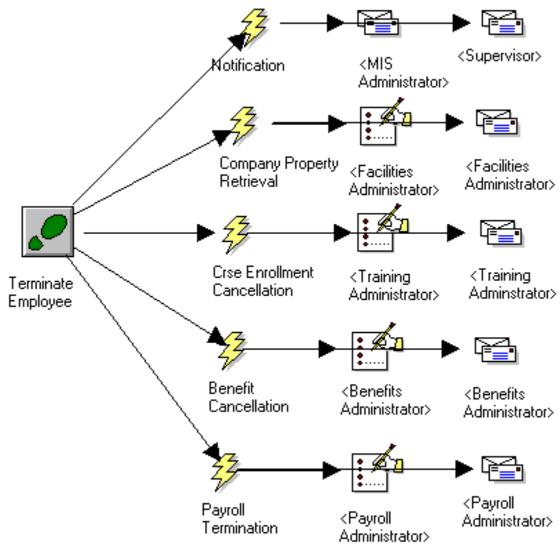
For more information on hiring employees, see Hiring Your Workforce.

Using Workflow to Terminate Employees

Just as the Hire Employee workflow automates hiring an employee into your organization, the Terminate Employee workflow streamlines the termination process. While the Hire Employee workflow ensures that the new employee is quickly integrated into your workforce, the Terminate Employee workflow makes sure that you process an individual leaving your organization according to your company's business procedures. By coordinating work between the appropriate administrators, workflow ensures that you take the correct actions in response to the employee's change in status.

When a user terminates an employee in the Job pages, the Terminate Employee workflow generates worklists and emails and routes them to different function administrators to notify them of the termination to be processed. For example, if an employee is enrolled in or awaiting a course, the system sends an email and a worklist to the training administrator. The email carries important information like the Employee ID and the date of termination. The worklist pulls the administrator directly into the page to process the employee.

The following Business process map illustrates the Terminate Employee workflow:



The Terminate Employee Activity

Where to Find the Workflow

Activity	Terminate Employee
Event(s)	Notification Company Property Retrieval Crse (Course) Enrollment Cancellation Benefit Cancellation Payroll Termination
Business Process Map(s)	The Terminate Employee activity is in the Administer Workforce business process map in Human Resources.

The Three Rs of Terminating an Employee

We've broken the Terminate Employees workflow down into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

The Terminate Employee business process employs the following rules:

- The Business Event, Benefit Cancellation is triggered if an employee is terminated and is enrolled in a benefit program.
- The Business Event, Company Property Retrieval is triggered when an employee is terminated and has company property that was issued but not returned.
- The Business Event, Crs (Course) Enrollment Cancellation is triggered when an employee is

terminated while still enrolled in a course.

- The Business Event, MIS Notification is triggered when an employee is terminated. It performs no further verification because an employee is likely to have system IDs and passwords outside the PeopleSoft system (email, for example).
- The Business Event, Payroll Termination is triggered when an employee is terminated and should be issued another paycheck from the PeopleSoft Payroll for North America System.
- The Business Event, Supervisor Notification is triggered when an employee is terminated. No further verification is done.

Roles

Once rules are established, they direct the system to send email or generate worklists for role users when an employee is terminated. The roles in the Terminate Employees workflow are as follows:

- Benefits Administrator
- Payroll Administrator
- MIS Administrator
- Training Administrator
- Facilities Manager
- Supervisor

While different individuals in your organization may play these roles, the roles themselves must be assigned to any individual role user if the rules and routings are to be followed. If no EmailID, FormID, or OPRID is indicated, the appropriate emails, electronic forms, and worklists cannot be generated by workflow.

Routings

The Terminate Employee workflow performs the following routings:

Role	***Email Sent***	***Worklists Generated***
Benefits Administrator	Yes	Yes. The system directs the Benefits Administrator to the Manage Benefit Enrollments activity for the terminated employee.
Payroll Administrator	Yes	Yes. The system directs the Payroll Administrator to the Update Employee Payroll Data activity for the terminated employee.

MIS Administrator	Yes	No.
Training Administrator	Yes	Yes. The system directs the Training Administrator to the Maintain Training Tables activity.
Supervisor	Yes	No.
Facilities Administrator	Yes	Yes. The system directs the Facilities Administrator to the Company Property activity for the terminated employee.

For more information about terminating employees, see Updating Workforce Information.

Using Workflow to Process Employees With Late Reviews

Processing employee reviews in a timely manner can be a challenging project. Notifying supervisors, making sure that they have the appropriate forms, and ensuring that they review their employees on time can require a lot of planning and coordination between Human Resources and every department in your organization. Using workflow, PeopleSoft Human Resources automates much of this process for you.

A business event that identifies employees with late reviews takes place when an employee does not receive a review on time. When the user triggers the process from the Plan Salaries module, the system routes an email to the employee’s supervisor with notice of the late review that must be processed. The email contains the name of the employee and the date the review was due. The system generates a worklist for the Personnel Administrator with the directive to enter the review in the system once the supervisor has routed the review to the employee.

Where to Find the Workflow

Activity	Find Late Reviews
Event	Notify Supervisor
Business Process Map(s)	The Process Employees with Late Reviews workflow is in the Plan Salaries business process map in Human Resources.

The Three Rs of Processing Late Reviews

We’ve broken down the Process Employees with Late Reviews workflow into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

The database agent Find Employees w/Late Reviews finds all employees whose next review date has passed. The employees will be processed through the Employee Review page that triggers the business process and business event, Employee Review/Late Reviews. This database agent can be run through Process Scheduler in the Plan Salaries, Process menu bar.

Roles

Once rules are established, they direct the system to send email or generate worklists for role users when an employee has missed a review. There is only one role in the Process Employees with Late Reviews workflow: Supervisor

While different or even multiple individuals in your organization may fill this role, the role itself must be assigned to any individual role user if the rules and routings are to be followed. If you haven't indicated an Empl (Employee) ID and Email ID, the appropriate emails and electronic forms cannot be generated by workflow.

Routings

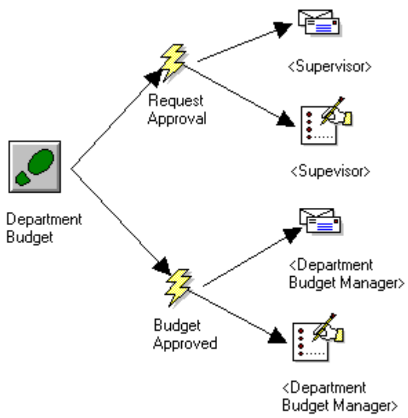
The Process Employees With Late Reviews workflow performs the following routing:

Role	***Email Sent***	***Worklists Generated***
Supervisor	Yes	Yes. The system directs the Supervisor to the Create Employee Review activity.

For more information on employee reviews, see Planning Salaries. For more information on Process Scheduler, see Process Scheduler.

Using Workflow to Maintain Department Budgets

Updating and maintaining salary budgets for departments in any organization can be a time-consuming and intensive task, involving many levels of managers and administrators. The Maintain Budgets Workflow can streamline this process by handling routing budget change requests and budget approvals for departments for you. The workflow ensures that your organization's budget approval rules are followed and that the proper supervisors and managers approve any changes in budgeting.



Maintain Budgets Activity

Where to Find the Workflow

Activity	Maintain Budgets
Event(s)	Request Approval Budget Approved
Business Process Map(s)	The Maintain Budgets activity is in the Plan Salaries business process map in Human Resources.

The Three Rs of the Maintain Budgets Workflow

We've broken down the Maintain Budgets workflow into its component rules, roles, and routings to give you a better understanding of what the workflow is doing.

Rules

The Maintain Budgets workflow implements the following business rules:

- This business event is triggered when the department budget manager requests a department budget change by clicking the **Request Approval** button in the Department Increase Budget page.

If you do not have workflow turned on, the **Request Approval** button doesn't appear in the Departmental Increase Budget page.

- The department budget manager's supervisor either approves the new budget and saves the page, or denies the budget change request.
- If the department budget manager's supervisor approves the request, the system routes an email to the department budget manager indicating that the change is approved and enters a worklist

item for the department budget manager so that salary changes may be made for employees in the affected department.

Roles

Once you establish the rules for this workflow, they direct the system to send email or generate worklists for role users when a department budget change is requested or processed. These are the roles in this workflow:

- Department Budget Manager
- Supervisor of the Department Budget Manager

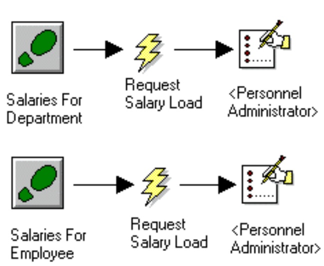
Routings

The Maintain Budgets workflow performs the following routings:

Role	***Email Sent***	***Worklists Generated***
Supervisor	Yes. Department budget manager's supervisor is notified of a requested budget change.	Yes. The system directs the supervisor back to the Maintain Budgets activity.
Department Budget Manager	Yes. An email notifies the Department Budget Manager that the budget has been approved and that there is a worklist waiting so that salary changes for the employees in the department can be made.	Yes. The system directs the Department Budget Manager to the Change Salaries activity.

Using Workflow to Change Salaries

Requesting and approving salary changes for employees is a process that readily lends itself to workflow in PeopleSoft Human Resources. When you evaluate and request changes for employees either individually, or by department, the system automatically routes a worklist to the Personnel Administrator to approve or deny the proposed salary changes.



Change Salaries Workflow

Where to Find the Workflow

Activities	Change Salaries For Department
	Change Salaries For Employee
Event	Request Salary Load
Business Process Map(s)	The Change Salaries activity is in the Plan Salaries business process map in Human Resources.

The Three Rs of the Change Salaries Workflow

We've broken down the Change Salaries workflow into its component rules, roles, and routings to give you a better understanding of what the workflow is doing.

Rules

The Change Salaries workflow implements the following business rules:

The business event is triggered when an authorized user enters a salary change for employees using either the Salary Plan Dept or the Salary Plan Employee pages and clicks the **Request Load** button.

If you do not have workflow turned on, the **Request Load** button doesn't appear in these pages.

The system creates a worklist for the Personnel Administrator to perform final approval and to load the salaries, if they are approved.

Roles

The rules for this workflow direct the system to generate a worklist for role users when an authorized user enters a salary change for employees, using either the Salary Plan Dept or the Salary Plan Employee pages, and saves the changes. There is only one role in this workflow: Personnel Administrator

Routings

The Change Salaries workflow performs the following routing:

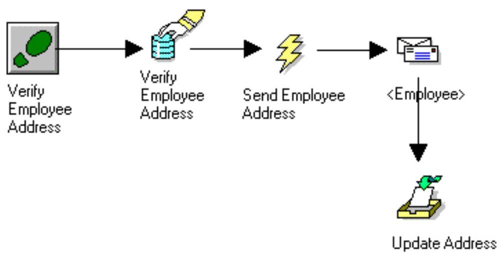
Role	***Email Sent***	***Worklists Generated***
Personnel Administrator	No.	Yes. The system directs the Personnel Administrator to the Post Raises to Job activity.

Using Workflow to Update Employee Addresses

Keeping an employee's personal information current can be a full-time job. With workflow, you can allow users who do not ordinarily have access to the PeopleSoft Human Resources system to update their address data from an email program like Lotus Notes and send the information to your PeopleSoft Human Resources system.

A PeopleSoft message agent takes the new information and automatically updates the Personal Data tables. An employee can initiate the Update Employee Address workflow process by filling out an electronic form to update a change in address.

An employee updating an address simply fills out the form with the correct information and saves and mails the document.



Verify Employee Address Workflow

Where to Find the Workflow

Activity	Verify Employee Address
Event	Send Employee Address
Business Process Map(s)	The Verify Employee Address activity is in the Administer Workforce business process map in Human Resources.

The Three Rs of Updating Employee Addresses

We've broken down the Update Employee Addresses workflow into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

To verify that your organization has the correct address information for its employees, PeopleCode automatically puts these business rules into effect by processing the HR Verify Employee Address database agent. HR Verify Employee Address is in Workflow Administrator, Process. It will find all employees who are role users with an Email ID.

Roles

Once rules are established, they direct the system to send email to role users when an employee's address changes. There is only one role in the Update Employee Addresses workflow: Employees.

Any employee not designated as a role user with an Email ID will not be able to participate in this workflow. If you haven't indicated an EmailID, FormID, or OPRID for the role user, the appropriate emails and electronic forms cannot be generated by workflow.

Routings

The Update Employee Addresses workflow performs the following routing:

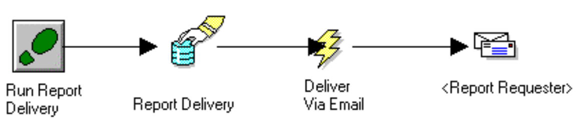
Role	***Email Sent***	***Worklists Generated***
Employee	Yes.	No.

Using Workflow to Deliver Reports

The Deliver Reports workflow enables you to schedule your system, not only to generate reports on a regular basis, but also to route the reports through email to role users for their immediate review.

The Deliver Reports workflow enables users to schedule multiple reports and to have them emailed to role users. We have set up the Deliver Reports workflow for sample reports across your PeopleSoft Human Resources system that use the As-of-Date parameter.

The following business process map details the Deliver Reports workflow:



Deliver Reports Workflow

Where to Find the Workflow

Activities Schedule HR Mass Reports and Deliver Reports

Event Deliver Through Email

Business Process Map(s) The Deliver Reports activity is in the Workflow - HR Administrator business process map in Human Resources.

The Three Rs of Mass Reporting

We've broken down the Deliver Reports workflow into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

The reports are created on an ad hoc basis whenever a user schedules them in the As-of-Date Mass Report. The Report Delivery database agent delivers the reports. We recommend that you schedule Report Delivery to execute on a regular basis.

Roles

There is only one role in the Deliver Reports workflow: Report Requester (Any role user with an Email ID).

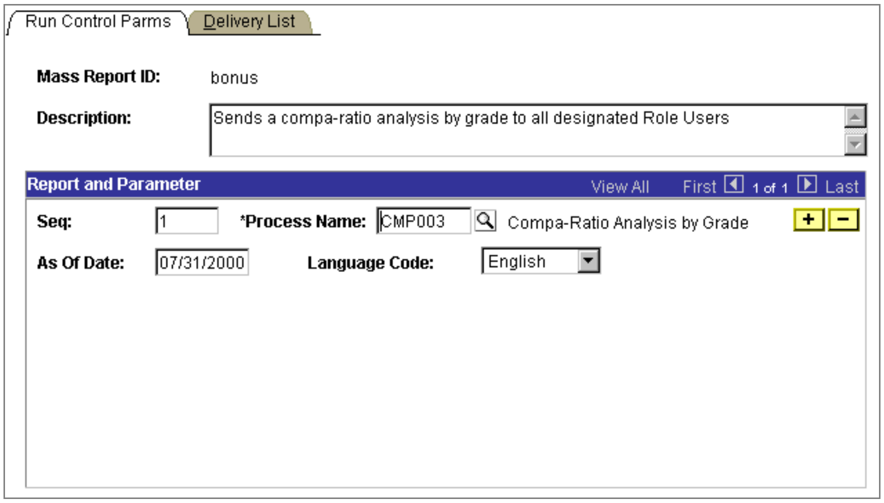
Routings

The Deliver Reports workflow performs the following routing:

Role	***Email Sent***	***Worklists Generated***
Report Requester	Yes. Sent to any role user with an Email ID	No

As-Of-Date Mass Report –Run Control Parms Page

Usage	Use the As-Of-Date Mass Report – Run Control Parms (Parameters) page to define a mass report.
Object Name	MASS_RPT_01_HR
Navigation	• **Administer Workforce, Administer Workforce (GBL), Process, As-of-Date Mass Report, Run Control Parms** • **Administer Workforce, Administer Workforce (USF), Process, As-of-Date Mass Report, Run Control Parms**
Access Requirements	Mass Report ID



As-of-Date Mass Report - Run Control Parms page

Enter a **Description** of the mass report.

The **Report and Parameter** page displays the **Seq** (sequence) number for the report. Select a **Process Name** from the list of available reporting processes. Enter an **As of Date.** The As of Date acts as part of the report's selection criteria, so if you want to report on data up to today's date, make this setting today's date.

You may also enter a **Language Code.** If the report is available in the language that you specify, the system prints it in that language. Otherwise, the report appears in English.

The Language Code defaults to the Base Language Code that you establish on the PeopleTools Options Table.

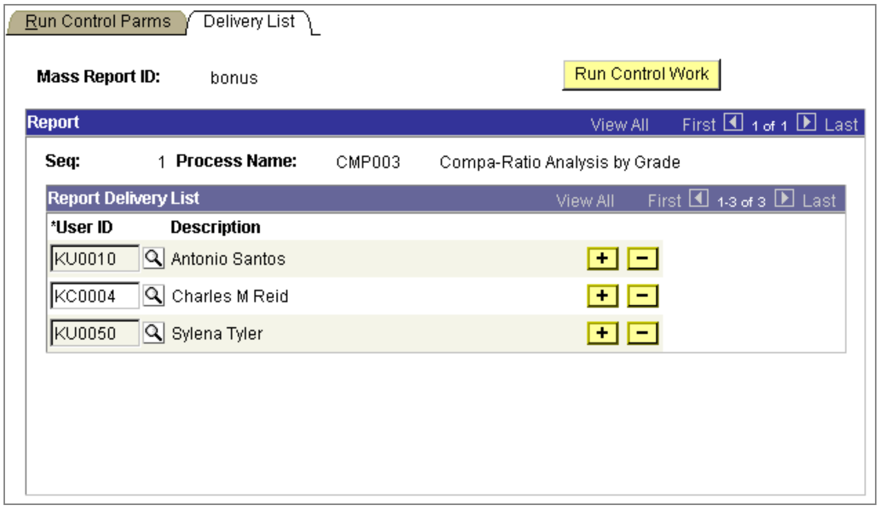
For more information on setting the system default language, see Working With Languages.

As-Of-Date Mass Report –Delivery List Page

Use the Delivery List page to designate the role users you want to receive a copy of your report.

Usage	Use the As-Of-Date Mass Report – Delivery List page to define a mass report.
Object Name	MASS_RPT_02_HR
Navigation	• **Administer Workforce, Administer Workforce (GBL), Process, As-of-Date Mass Report, Delivery List** • **Administer Workforce, Administer Workforce (USF), Process, As-of-Date Mass Report, Delivery List**

Prerequisites	You should use the As-Of-Date Mass Report – Run Control Parms (Parameters) page to define a mass report before designating recipients.



As-of-Date Mass Report - Delivery List page

To designate recipients, enter each role user you want on your **Report Delivery List.**

Scheduling Reports

Click the **Run Control Work** button to execute the Mass Reporting workflow process. The workflow generates the reports listed in the Run Control Parms page.

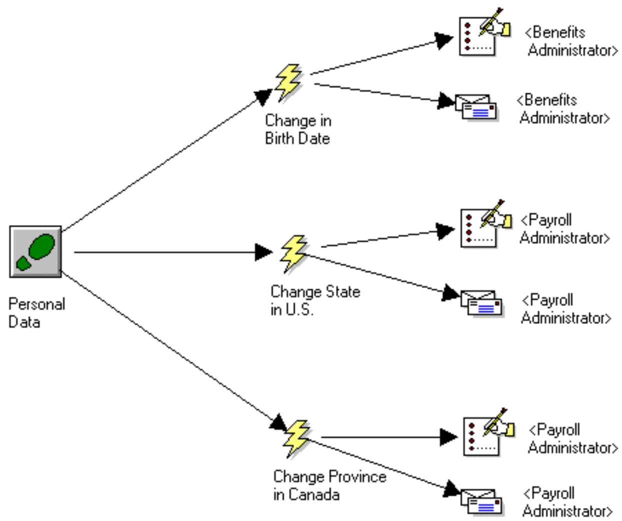
Generate the mass change reports on a dedicated Windows server. As workflow generates the reports, they will collect on this server until the scheduled delivery date and time.

You must deliver reports from the same dedicated Windows server from which the reports are generated. You should have an active PeopleSoft window running on this server prior to scheduling these reports for delivery.

To schedule reports for delivery, select **Workflow Administrator, Process, Database Agent**, run the process, and choose **Report Delivery** from the database agent list on the Process Scheduler Request page. We suggest that you schedule mass reports on a regularly recurring basis.

Using Workflow to Maintain Personal Data

The Maintain Personal Data workflow automates the process you use to change employee birth date information for your employees, and ensures that the Payroll Administrator is notified when US employees change States or Canadian employees change Provinces. The following business process map details the Maintain Personal Data workflow.



Maintain Personal Data Workflow

Where to Find the Workflow

Activity	Maintain Personal Data
Events	Change in Birthday
	Change State in U.S.
	Change Province in Canada.
Business Process Map(s)	The Maintain Personal Data workflow is in the Administer Workforce business process map in PeopleSoft Human Resources.

The Three Rs of Processing Personal Data

We've broken down the Maintain Personal Data workflow into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

If an employee submits a change in birth date, the Benefits Administrator must be notified to process the change.

If a U.S. employee moves to another State, the Payroll Administrator must be notified.

If a Canadian employee moves to another Province, the Payroll Administrator must be notified.

Roles

Once rules are established, they direct the system to send email or generate worklists for role users when employees change their birth date or move to a new state or province. The roles in the Maintain Personal Data workflow are as follows:

- Benefits Administrator
- Payroll Administrator

While different individuals in your organization may fill this role, the roles themselves must be assigned to any individual role user if the rules and routings are to be followed. If you haven't indicated an Empl (Employee) ID and Email ID, the appropriate emails and electronic forms cannot be generated by workflow.

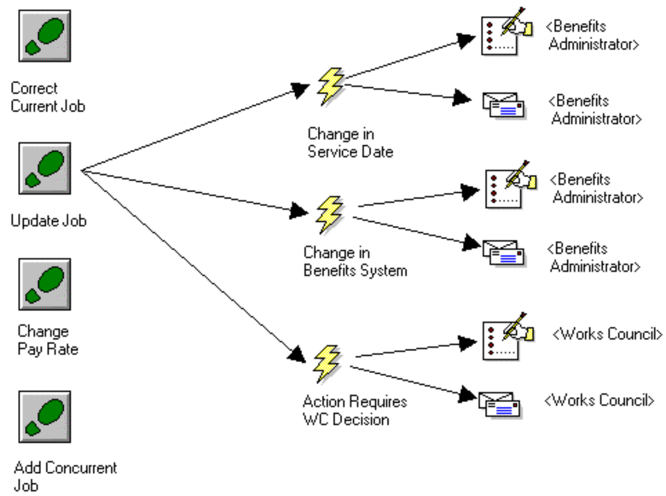
Routings

The Process Employees With Late Reviews workflow performs the following routings:

Role	***Email Sent***	***Worklists Generated***
Benefits Administrator	Yes	Yes. The Benefits Administrator is routed to the Personal Data pages.
Payroll Administrator	Yes	Yes. The Payroll Administrator is routed to the Update Employee Payroll Data activity, or the Update Employee Payroll Data CAN activity, as appropriate.

Using Workflow to Maintain Job Data

The Maintain Job Data workflow automates the processes you use to update employee service dates and change employee benefits programs. If you have a German workforce, this workflow also initiates the review of personnel actions by the Works Council.



Maintain Job Data Workflow

Where to Find the Workflow

Activity	Maintain Personal Data
Events	Change in Service Date Change in Benefits System Action Requires Works Council Decision.
Business Process Map(s)	The Maintain Job Labor workflow is in the Administer Workforce business process map in PeopleSoft Human Resources.

The Three Rs of Processing Job Data

We've broken down the Process Employees with Job Data workflow into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

If the employee's service date (EMPLOYMENT.SERVICE_DT) has changed, the Benefits Administrator must be notified to initiate appropriate action.

If the Benefits field on Employment is modified, the Benefits Administrator must be notified.

If a Job Action/Reason requires a decision by the German Works Council, the Works Council representative needs to be notified.

Roles

Once rules are established, they direct the system to send email or generate worklists for role users when the system finds an employee whose next review date has passed. The roles in the Process Employees with Late Reviews workflow are as follows:

- Benefits Administrator
- Works Council Representative

While different individuals in your organization may fill this role, the roles themselves must be assigned to an individual role user if the rules and routings are to be followed. If you haven't indicated an Empl (Employee) ID and Email ID, the appropriate emails and electronic forms cannot be generated by workflow.

Routings

The Process Employees With Late Reviews workflow performs the following routings:

Role	***Email Sent***	***Worklists Generated***
Benefits Administrator	Yes	Yes
Works Council Representative	Yes	Yes. The system directs the Works Council representative to the Inquire page called Works Council Decision.

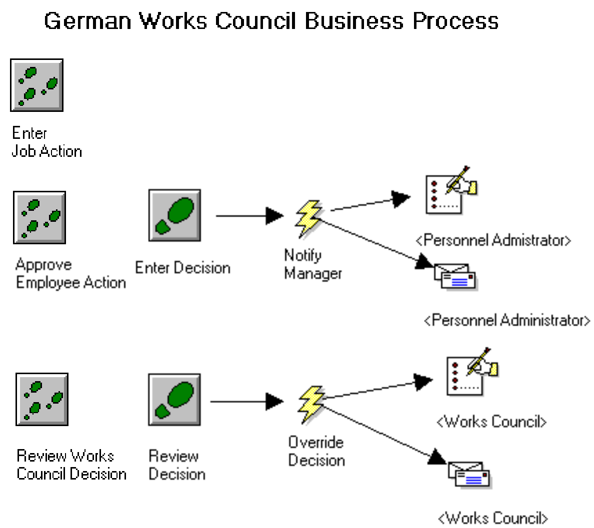
For more information about the German Works Council business process in PeopleSoft Human Resources, see Overview of the German Works Council Business Process and Using Workflow to Review German Works Council Decisions.

Using Workflow to Review German Works Council Decisions

The German Works Council Decision workflow automates Works Council reviews of proposed personnel actions for your German operations. The events that lead up to the workflow begin when a personnel action for a German employee associated with the DEU regulatory region is entered into Job Data. If the Action Reason is associated with a Works Council Decision Group that requires notification to the Works Council, then a workflow is initiated. This workflow is described in the previous heading Using Workflow to Maintain Job Data.

Once the Works Council member is notified, they use the Works Council Decision pages to review and respond to the personnel action. If the Works Council's decision is to change the proposed personnel action, then the workflow notifies the person in the Personnel Administrator role (generally the Human Resources Manager) by sending an email and a Worklist. In the following diagram, this is represented by the Approve Employee Action activity.

The Personnel Administrator uses the Decisions - Germany page to review the Works Council's decision to change the proposed personnel action. If the Personnel Administrator overrides the Works Council Decision, the workflow notifies the Works Council by sending an email and a Worklist. In the following diagram this is represented by the Review Works Council Decision activity.



The German Works Council Decision Business Process and Workflow

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For more information about the German Works Council business process in PeopleSoft Human Resources, see Overview of the German Works Council Business Process.

Where to Find the Approve Employee Action Workflow

Activity	Approve Employee Action
Event(s)	Notify Manager
Business Process Map(s)	Manage Labor Relations: German Works Council Business Process

The Three Rs of Approving an Employee Action

We've broken the Approve Employee Action workflow down into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

The Approve Employee Action workflow employs the following rule:

The business event Notify Manager is triggered if the decision entered by the Works Council representative in the Works Council Decision page needs to be acted upon by the HR Manager. The HR Manager must be notified.

Roles

Personnel Administrator (HR Manager)

Routings

The Approve Employee Action workflow performs the following routing:

Role	***Email Sent***	***Worklist Generated***
Personnel Administrator	Yes	Yes

Where to Find the Review Works Council Decision Workflow

Activity	Review Works Council Decision
Event(s)	Override Decision
Business Process Map(s)	Manage Labor Relations: German Works Council Business Process

The Three Rs of Reviewing a Works Council Decision

We've broken the Review Works Council Decision workflow down into its component rules, roles, and routings to give you a better understanding of what this workflow is doing.

Rules

The Review Works Council Decision workflow employs the following rule:

The business event Override Decision is triggered when the HR Manager overrides a Works Council Decision using the Decisions - Germany page. The Works Council representative must be notified.

Roles

Works Council representative.

Routings

The Approve Employee Action workflow performs the following routing:

Role	***Email Sent***	***Worklist Generated***

C H A P T E R 11

Working with Multiple Components of Pay

With Multiple Components of Pay functionality, you can define pay components to determine employees' compensation. You can associate pay components with jobs and salary steps to use consistently throughout your organization. These pay components might include regular pay, additional pay for work under hazardous conditions, work in a different job, pay for an equipment allowance, and so on. Pay components might represent an hourly rate, a flat amount, and an addition to the base hourly rate. You can figure a percentage of a worker's base pay and use it as a pay component. You can also compensate workers using salary points. If you like, you can create unique compensation packages for each of your employees.

Overview of Multiple Components of Pay

To administer Multiple Components of Pay, you are required to define rate codes. You associate these codes with compensation amounts, which you use to define compensation for your workforce. However, the rest of the items in the following bulleted list are optional, and they provide invaluable functionality for rate code use.

To administer Multiple Components of Pay:

- Define rate codes on the Comp Rate Code Table page. (required). Associate these rate codes with the following criteria:
  - Compensation rates or percentages
  - Compensation frequencies
  - Rate code classes (optional)
- Define rate code classes on the Rate Code Classes page. (optional)
  - Rate code classes enable you to bundle rate codes into classes to narrow your search for a rate code.
  - The rate code class SENPAY enables you to bundle rate codes into a seniority pay rate code class for the administration of seniority pay to workers.
- Define rate code groups on the Rate Code Groups page. (optional)
  - You must also select the **Rate Code Groups** check box on the Installation Table – HRMS Options page.

- Rate code groups enable you to calculate a percentage of selected base pay rate codes in a compensation package on the Salary Grade Tables – Salary Step Components page, the Job Code Table - Default Compensation page, the Job Code Table - Non-Base Compensation page, and the Job Data - Compensation page.

- Associate rate codes with salary steps on the Salary Grade Tables – Salary Step Components page. (optional)
- Associate rate codes with job codes on the Job Code Table - Default Compensation page and on the Job Code Table - Non-Base Compensation page. (optional)
- Associate job codes (and the rate codes you assign to them) with positions on the Position Data – Job Information page. (optional)
- Associate rate codes with employee records on the Job Data - Compensation page. (optional)
- Compensate workers using salary points: (optional)
  - Select the **Salary Points** check box on the Installation Table – HRMS Options page.
  - Set up the Salary Points monetary value on the Company Table – Default Settings page.
  - Associate point value (an integer) with rate codes on the Salary Grade Tables – Salary Step Components page, the Job Code Table - Default Compensation page, and Job Code Table - Non-Base Compensation page, and the Job Data - Compensation page.

Terms and Definitions Used With Multiple Components of Pay

Term	***Definition***
Base Pay	A pay component included in the job comp (job compensation) rate calculation. It is pay for a regularly assigned workweek. For example, you can set up a regular hourly rate plus a shift rate, a union-negotiated rate for hazardous work, and so on.
Compensation Package	All of the base and non-base pay components on a job row.
Job Code	An ID for a job as defined on the Job Code table.
Job Code Components	The pay components assigned to a job code by associating rate codes with job codes on the Default Compensation page or the Non-Base Compensation page of the Job Code table.
Job Compensation Rate	The compensation rate of the corresponding job row.
Non-Base Pay	A pay component not included in the job comp rate calculation. It is used by payroll only in the paysheet calculation. For example, non-base pay can be set up for additional work, holiday pay, bonuses, and so on.
Pay Components	Rows in the compensation record. They build the

	compensation packages in the compensation record.
Rate Code	IDs for pay components. Rate codes define rates of pay and are set up in the Comp Rate Code table. Rate codes are then used to represent pay components in pages and when configuring compensation packages in the compensation record.
Rate Code Group	A rate code group is a number of pay components (represented by rate codes) bundled into a subset of a compensation package. The rate code group is used to calculate percentage-based components that do not apply the percentage to all pay components in the compensation package. Rate code groups are constructed on the Rate Code Groups page.
Rate Code Type	Defines how the monetary value of the rate code is calculated. The compensation rate code type is defined on the Comp Rate Code table. Valid values are Flat Amount, Hourly Rate + Flat Amount, Hourly Rate, Percent, and Points.
Salary Step Components	Pay components assigned to a salary step by entering the corresponding rate codes on the Salary Step Components page.
Seniority Pay	A premium paid for seniority or for the length of time an employee works for an organization.
Seniority Pay Components	Pay components whose rate codes are assigned to the seniority rate code class SENPAY (provided by PeopleSoft) on the Comp Rate Code Table page, allowing you to access the seniority pay functionality.
Seniority Rate Codes	Rate codes associated with the seniority rate code class on the Comp Rate Code Table page. Levels of pay increase are set up for these codes on the Comp Rate Code Table - Seniority Pay page.

Setting Up Multiple Components of Pay

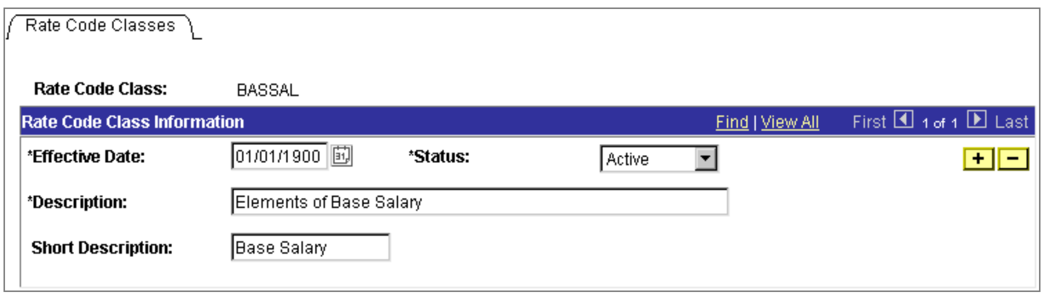
To begin using the Multiple Components of Pay functionality, you define compensation rate codes. At this part of the process, you can optionally define rate codes classes, too. If you define rate code classes before you define your rate codes, you can associate rate code classes with rate codes while you define your rate codes. So, setting up your rate code classes first saves you time. That's why setting up rate code classes is presented before setting up rate codes.

The Rate Code Classes page enables you to associate individual rate codes with rate code classes. These classes provide a way to limit the search for rate codes in the pages throughout the system. Once you have created rate code classes on this page, you then assign them to rate codes on the Comp Rate Code Table.

Use the Comp Rate Code Table page to set up rate codes. Rate codes define rates of pay and represent pay components in PeopleSoft Human Resources. Rate codes can also represent a value you use to calculate a percentage of a group of rate codes or a percentage of a job compensation rate. In addition, you can use rate codes to compensate with points.

Rate Code Classes Page

Usage	Use the Rate Code Classes page to create rate code classes.
Object Name	RATECD_CLASS_TBL
Navigation	• **Define Business Rules, Define Payroll Process, Setup 1, Rate Code Classes, Rate Code Classes** • **Define Business Rules, Define Payroll Process (USF), Setup 1, Rate Code Classes, Rate Code Classes** • **Define Business Rules, Manage Human Resources (GBL), Setup, Rate Code Classes, Rate Code Classes**
Access Requirements	Enter a Rate Code Class name.

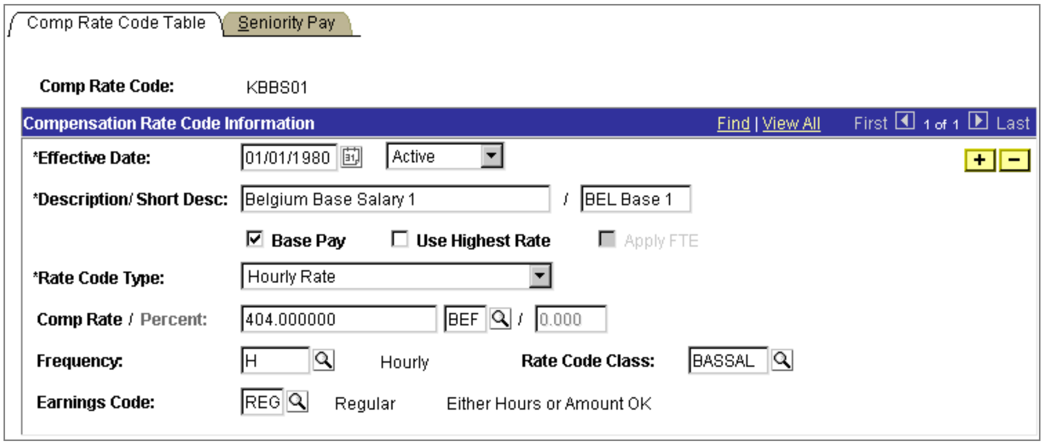


Rate Code Classes page

The following elements are common to multiple pages in this application and are defined in PeopleBooks Standard Page Element Definitions **Effective Date, Status, Description,** and **Short Description.**

Comp Rate Code Table - Comp Rate Code Table Page

Usage	Use the Comp Rate Code Table page to define rate codes. Rate codes define rates of pay.
Object Name	COMP_RATECD_TBL
Navigation	• **Define Business Rules, Define Payroll Process, Setup 1, Comp Rate Code Table, Comp Rate Code Table** • **Define Business Rules, Define Payroll Process (USF), Setup 1, Comp Rate Code Table, Comp Rate Code Table** • **Define Business Rules, Manage Human Resources (GBL), Setup, Comp Rate Code Table, Comp Rate Code Table**
Prerequisites	None
Access Requirements	Enter a Compensation Rate code.



Comp Rate Code Table - Comp Rate Code Table page

The following fields are common to multiple pages and are defined in PeopleBooks Standard Page Element Definitions **Effective Date, Description,** and **Short Description.**

Comp Rate Code (compensation rate code)
: The system displays the compensation rate code you entered when you accessed the page.

Base Pay
: Select this check box if the rate code is a base-pay component. Only base-pay rate codes are included in the Job Comp Rate (job compensation rate) calculation.

Use Highest Rate
: Select this check box to use the highest rate of pay for this rate code. Use this option when an employee is temporarily placed in another job that is paid at a higher rate. This field is for informational purposes only and does not affect human resources processing.

Apply FTE
: Select this check box if you want the rate code to be calculated as part of FTE (full-time equivalency). FTE is the percentage of full time the employee should normally work in the corresponding job. Full time is defined in the Standard Hours and Standard Work Period fields in the Salary Plan table. Alternatively, it can be defined in the default Standard Hours and default Standard Work Period fields in the Installation table.

Rate Code Type

Select a rate code type. Depending upon the type you select, certain fields become available for entry. The following valid values prompt from the Translate table:

Flat Amount: A flat (or fixed) amount.

Hourly Rate + Flat Amount: A flat amount paid in addition to the hourly rate specified on the worker's timesheet. Enter the ***Flat Amount*** in the **Comp Rate** field (see below). This type cannot be a base-pay component.

Hourly Rate: An hourly rate of pay.

Percent: A percentage figure for use in defining compensation.

Points: Salary points paid for a job. Set up the point's monetary value on the Company Table page. You associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages of the Job Code table, the Salary Grade Tables - Salary Step Components page, and the Job Data - Compensation page.

Note. To use points, you must select the **Salary Points** check box on the Installation Table – HRMS Options page.

Rate Code Type	***Fields Available for Entry***
Flat Amount	Comp Rate, Currency Code, Frequency, Rate Code Class, Earnings Code
Hourly Rate + Flat Amount	Comp Rate, Currency Code, Frequency, Rate Code Class, Earnings Code
Hourly Rate	Comp Rate, Currency Code, Frequency, Rate Code Class, Earnings Code
Percent	Currency Code, Percent, Frequency, Rate Code Class, Earnings Code
Points	(none)

Comp (Compensation) Rate	Enter a compensation rate for this rate code. Select a currency. Valid values prompt from the Currency table.
Percent	Enter a **Percent** for use as a percentage calculation of all base pay components or a percentage of a rate code group where a rate code group contains one or more base pay components.
Frequency	Select a **Frequency** (hourly, daily, monthly, annually, and so on) to express the compensation rate. Valid values prompt from the Frequency table. You can define frequencies on the Frequency Table page. The rate code type ***Flat Amount*** cannot have a frequency of ***Hourly.*** The rate types ***Flat Amount & Hourly*** and ***Hourly*** must have a frequency of ***Hourly.***
Rate Code Class	Select a **rate code class** to associate with a rate code. You can create rate code classes using the **Rate Code Classes** page. Valid values prompt from the **Rate Code Class** table: ***Elements of Base Salary (BASSAL)*** is used in Salary Forecasting. ***Seniority (SENPAY)*** enables you to create seniority pay components, associate them with levels of pay increase, and update them according to changing seniority status. ***Regular Bonus (REGBON)*** is used in Salary Forecasting.
Earnings Code	Select an **earnings code.** Valid values prompt from the Earnings table. **Earnings codes** define the way earnings are calculated and taxed. You establish **earnings codes** on the Job Earnings Distribution page.

Defining Groups of Rate Codes

Once you have defined rate codes, you can (optionally) set up rate code groups. Bundling rate codes together into groups enables you to be specific when calculating percentage-based pay components as part of your employee compensation packages. For example, an employee's base compensation package may be made up of a base-pay component, a cost of living component, child-care cost components, and commuting-cost components. If a percentage-based bonus is also part of the employee's compensation, you may want to calculate the bonus amount based on only certain pieces of your employee's compensation package, as opposed to the entire package. With rate code groups, you can bundle base-pay components that you want the system to use in its calculation, excluding other pay components from that calculation.

You can associate a rate code group with a percentage rate code in a salary step on the Salary Grade Tables - Salary Step Components page, with a job code on the Default Compensation and Non-Base Compensation pages of the Job Code table, or at the employee level on the Job Data -

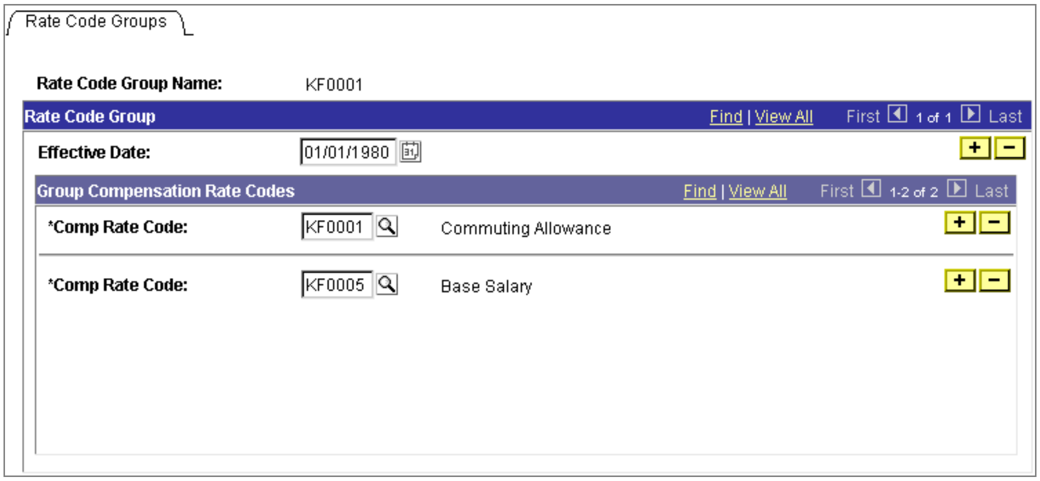
Compensation page. If you do so, the system applies a specific percentage to all the rates within the rate code group and then adds this total to the employee's compensation package. Or, you don't have to use rate code groups at all, but can calculate percentage rates using the employee's entire base-pay compensation package.

When you implement a pay increase for an employee, you can specify that the employee receives a percentage increase of base pay as defined in the rate code group. When the system calculates the actual value of the increase, it calculates based on the different pay rates associated with the base-pay rate group.

To use rate code groups in PeopleSoft Human Resources, you must select the **Use Rate Code Groups** check box on the Installation Table – HRMS Options page.

Rate Code Groups Page

Usage	Use the Rate Code Groups page to create groups of rate codes. The name you enter as you access the page is the name of the rate code group.
Object Name	COMPRT_GRP_PNL
Navigation	• **Define Business Rules, Define Payroll Process, Setup 1, Rate Code Groups, Comprt Grp Pnl** • **Define Business Rules, Define Payroll Process (USF), Setup 1, Rate Code Groups, Comprt Grp Pnl** • **Define Business Rules, Manage Human Resources (GBL), Setup, Rate Code Groups, Comprt Grp Pnl**
Prerequisites	Define rate codes on the Comp Rate Code Table page. Select the Use Rate Code Groups check box on the Installation Table – HRMS Options page.
Access Requirements	Enter a Rate Code Group name.



Rate Code Groups page

The following field is common to multiple pages and is defined in PeopleBooks Standard Page Element Definitions **Effective Date.**

Comp Rate Code (compensation rate code)	Select a compensation rate code that you want to include in the rate code group. Valid values prompt from the Rate Code table. When you leave the field, the system displays the rate code description for your reference. Add additional rows to include more rate codes in the group.

Defining Compensation Rates for Workers

After you define rate codes (and any optional categories such as rate code classes and groups), you are ready to define compensation rates for workers. Defining worker compensation is fully documented in other chapters of PeopleBooks for PeopleSoft HRMS, as shown by the links below.

Using rate codes, you define specific rates of pay in the following ways:

- Associate rate codes with salary steps on the Salary Grade Tables – Salary Step Components page.
- Associate rate codes with job codes on the Job Code Table - Default Compensation page and on the Job Code Table - Non-Base Compensation page.
- Associate job codes (and the rate codes you assign to them) with positions on the Position Data – Job Information page.
- Associate rate codes with employee records on the Job Data - Compensation page.
- Compensate workers using salary points:
  - Select the **Salary Points** check box on the Installation Table – HRMS Options page.
  - Set up the Salary Points monetary value on the Company Table – Default Settings page.

- Associate point value (an integer) with rate codes on the Salary Grade Tables – Salary Step Components page, the Job Code Table - Default Compensation page, the Job Code Table - Non-Base Compensation page, and the Job Data - Compensation page.

Administering Seniority Pay

Many organizations pay a premium for seniority. Seniority is the length of time employees work for the organization. You can create seniority pay components, associate them with levels of pay increase, and update them according to changing seniority status.

Overview of Seniority Pay

Rate code class is a property you can assign to a rate code. You define your own rate code classes on the Rate Code Classes page to help you group and search for rate codes. However, PeopleSoft delivers the rate code class SENPAY with your system. Use SENPAY to Administer seniority pay. First, you create seniority rate codes and associated levels of seniority compensation increase. Then you run the Update Seniority Pay and the Update Seniority Pay Eligibility processes as needed. The Multiple Seniority Components report helps determine if worker compensation packages have multiple seniority rate codes.

To administer seniority pay:

1. Create seniority rate codes by associating a rate code with the seniority rate code class SENPAY on the Comp Rate Code Table page.

2. Associate a seniority rate code with levels of seniority compensation increase on the Comp Rate Code Table - Seniority Pay Page.

   On this page, you can also associate a seniority rate code with one or more groups you define in using Group Build (Setting up Group Definitions).

3. Run the Update Seniority Pay process to add and update seniority rate codes in worker compensation packages.

   You can also add seniority rate codes to worker compensation packages manually. Although you add them manually, the Update Seniority Pay process updates these seniority rate codes.

4. Run the Update Seniority Eligibility process to determine if workers are still eligible for seniority pay components.

   If a worker is no longer eligible for seniority pay, the system removes the seniority rate code from that worker's compensation package. However, the process does not remove seniority rate codes that were manually added.

5. Run the Multiple Seniority Components report to determine if worker compensation packages have multiple seniority rate codes.

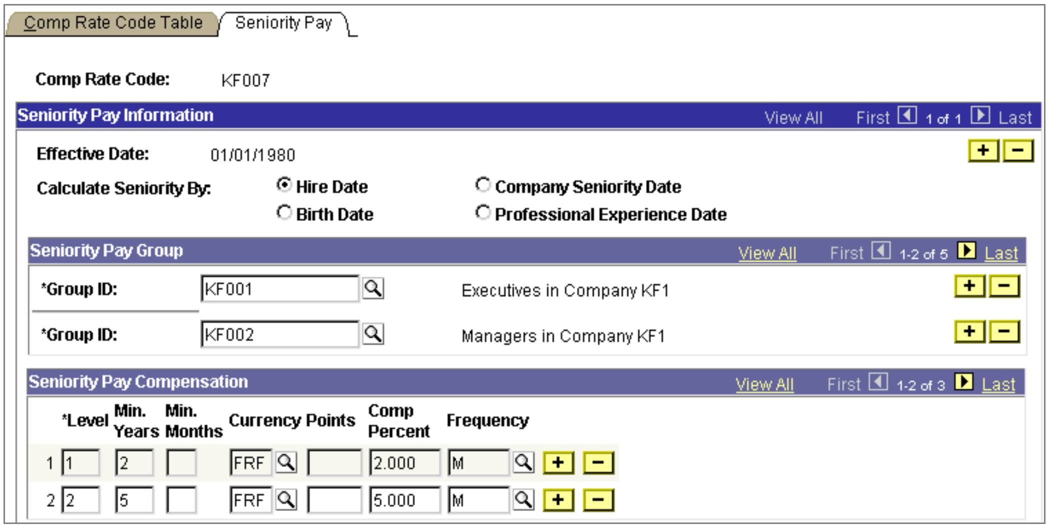
   This report enables you to look at those employee records with multiple seniority rate codes and to check if the seniority components are appropriate.

Terms and Definitions Used With Seniority Pay

Term	***Definition***
Compensation Package	All of the base-pay and non-base-pay components on a job row.
Pay Components	Rows in the compensation record. They build the compensation packages in the compensation record.
Rate Code	IDs for pay components. Rate codes define rates of pay and are set up on the Comp Rate Code Table page. Rate codes are then used to represent pay components in pages and in configuring compensation packages in the compensation record.
Seniority Pay	A premium paid for seniority or for the length of time an employee works for an organization.
Seniority Pay Components	Pay components whose rate codes are assigned to the seniority rate code class SENPAY (provided by PeopleSoft) on the Comp Rate Code Table page, allowing you to access seniority pay functionality.
Seniority Rate Codes	Rate Codes associated with the seniority rate code class on the Comp Rate Code Table page. Levels of pay increase are set up for the Seniority Rate Codes on the Comp Rate Code Table - Seniority Pay page.

Comp Rate Code Table - Seniority Pay Page

Usage	Use the Comp Rate Code Table - Seniority Pay Page to associate a Seniority Rate Code with levels of compensation increase–by amount, points, or percentage of pay. Here you specify the type of date on which to base seniority, such as Hire Date, Birth Date, Company Seniority Date, or Professional Experience Date. You can also use this page to associate a Seniority Rate Code with one or more Groups that you define in the Group Build module.
Object Name	SENIORITY_PAY
Navigation	• **Define Business Rules, Define Payroll Process, Setup 1, Comp Rate Code Table, Seniority Pay** • **Define Business Rules, Define Payroll Process (USF), Setup 1, Comp Rate Code Table, Seniority Pay** • **Define Business Rules, Manage Human Resources (GBL), Setup, Comp Rate Code Table, Seniority Pay**
Prerequisites	Create seniority rate codes on the Comp Rate Code Table page.
Access Requirements	Enter a Seniority Rate code.



Comp Rate Code Table - Seniority Pay page

The following field is common to multiple pages and is defined in PeopleBooks Standard Page Element Definitions **Effective Date.**

Comp Rate Code (compensation rate code)
The system displays the seniority compensation rate code you entered.

Calculate Seniority By
Select the starting date for the Seniority Calculation from the following valid values:

Hire Date. The date the employee was hired by the organization.

Company Seniority Date. This date tracks the amount of time an employee has been with a particular company in the organization. The company seniority date is automatically set to the hire date, but you can override it.

Birth Date. The employee's birthdate.

Professional Experience Date. The date the employee began working in a job requiring the skills directly related to the current position.

Group ID
Enter one or multiple **Group IDs** to associate the Seniority Rate Code with groups you define in Group Build (Setting up Group Definitions). The system issues a warning if the ID you enter is already associated with another Seniority Rate Code. The system displays the name of the **Group ID** when you move out of the field.

Note. The system associates the Seniority Rate Code with every worker's compensation package if you do not enter a **Group ID.**

Level	Enter a Seniority **Level.**
Min. Years (minimum years)	Enter the minimum years of service necessary to qualify for the Seniority Level. If you enter both minimum years and minimum months, the system uses the total of these years and months in its calculation.
Min. Months (minimum months)	Enter the minimum months of service necessary to qualify for the Seniority Level. If you enter both minimum years and minimum months, the system uses the total of these years and months in its calculation
Currency	Select a **Currency** to associate with this Seniority Level. Valid values prompt from the **Currency** table.
Comp Percent	Enter a compensation rate to associate with this Seniority Level.
Frequency	Select a **Frequency** (hourly, daily, monthly, annually, and so on) to express the compensation rate. Select valid values prompted from the **Frequency** table. You define frequencies on the Frequency Table page.

Overview of the Update Seniority Pay Process

The Update Seniority Pay process both adds and updates seniority rate codes in worker compensation packages. For each worker, the process determines if the worker's compensation package contains the corresponding seniority rate code(s).

If the worker's compensation package contains the seniority rate code:

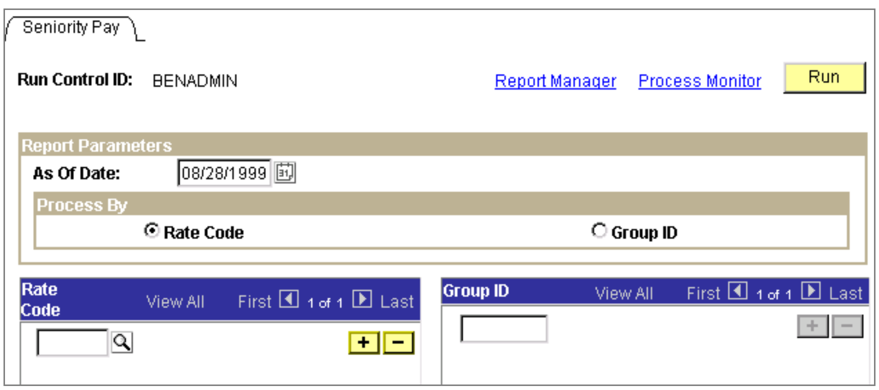
- The system checks to see if adequate time has passed for the worker to reach the next seniority level.
- If the worker is eligible for the next seniority level, the system inserts a new job row and adds a new compensation package with the seniority rate code and corresponding amount of pay for the next seniority level.

If the worker's compensation package does not contain a seniority rate code:

- The system inserts a new job row with an action of Pay Rate Change and a new action reason of SEN (seniority).
- The system updates the worker's compensation package to add the seniority rate code.

Update Seniority Pay –Seniority Pay Page

Usage	Use the Update Seniority Pay – Seniority Pay page to add and update seniority pay components in workers' compensation packages.
Object Name	RUNCTL_SENPAY2
Navigation	**Administer Workforce, Administer Workforce (GBL), Process, Update Seniority Pay, Update Seniority Pay**
Prerequisites	Create seniority pay components by associating a rate code with a seniority rate code class on the Comp Rate Code Table page. Associate a seniority rate code with levels of seniority compensation increase on the Comp Rate Code Table - Seniority Pay page. Associate seniority rate codes with a Group ID on the Comp Rate Code Table - Seniority Pay page, if you are using groups.
Access Requirements	Enter a Run Control ID.



Update Seniority Pay –Seniority Pay page

The following fields are common to multiple pages and are defined in PeopleBooks Standard Page Element Definitions **Run Control ID,** and **As Of Date.**

Process By

Determine how you want to run the Update Seniority Pay process: by **Rate Code** or by **Group ID.** Click one of the radio buttons.
Rate Code: The process adds or updates seniority rate codes in the compensation packages of all employees in groups that are associated with the seniority rate codes you list on this page. If a seniority rate code is not associated with a group ID, the process adds the seniority rate code to the compensation packages of all workers.

If you click **Rate Code,** the **Rate Code** field in the next section of the page becomes available for data entry.

Group ID: The process adds or updates seniority rate codes in the compensation packages of all employees associated with the groups you list on this page.

If you click **Group ID,** the **Group ID** field in the next section of the page becomes available for data entry.

Rate Code

This field is available for data entry if you clicked the **Rate Code** button in the **Process By** field. Select one or more **Rate Codes** prompting from the Comp Rate Code Table. Insert rows to run the process using multiple Seniority **Rate Codes**. The system displays the associated **Group IDs** when you leave the field.

Group ID

This field is available for data entry if you clicked **Group ID** in the **Process By** field. Select one or more group IDs prompted by the Group table. Insert rows to run the process using multiple Group IDs. The system displays the associated **Rate Codes** when you leave the field. (Groups for which you do not have security access do not appear.)

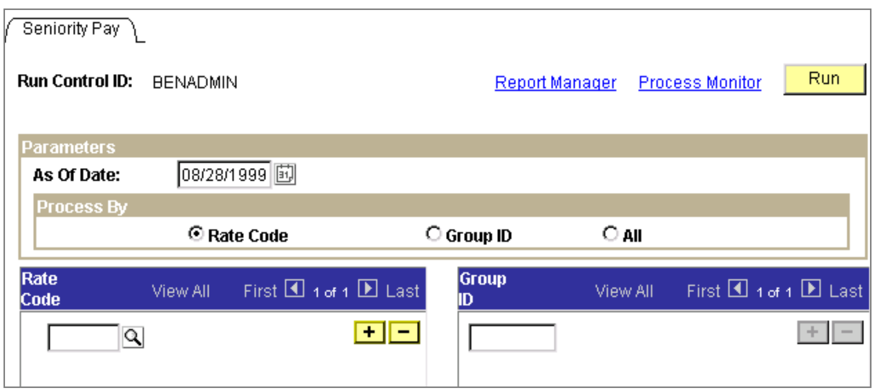
For more information on defining and building employee groups, see PeopleSoft 8 Application Fundamentals for HRMS, "Working With Groups" For more information on security for employee groups, see PeopleSoft 8 Application Fundamentals for HRMS, "Working With Groups"

Click **Run** to run this request. Process Scheduler runs the Update Seniority Pay process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Update Seniority Eligibility –Seniority Pay Page

Usage	Use the Update Seniority Eligibility – Seniority Pay page to make sure workers are still eligible for seniority pay components. If a worker is not eligible, the process updates the employee compensation package by removing the seniority rate codes. However, this process does not remove manually added seniority rate codes. You have the option to run the process by seniority rate code, by Group ID, or for all workers.
Navigation	**Administer Workforce, Administer Workforce (GBL), Process, Update Seniority Eligibility**
Prerequisites	Create seniority rate codes by associating a rate code with a seniority rate code class on the Comp Rate Code Table page. Associate a seniority rate code with levels of seniority compensation increase on the Comp Rate Code Table - Seniority Pay page. Associate seniority rate codes with a Group ID on the Comp Rate Code Table - Seniority Pay page if you are using groups.
Access Requirements	Enter a Run Control ID.



Update Seniority Eligibility –Seniority Pay page

All but one of the fields on this page are identical to the fields on the Update Seniority Pay – Seniority Pay page. The exception is the **Process By** field.

Process By — **All** runs the report for all employees.

For complete information about the remaining fields on this page, see the Update Seniority Pay – Seniority Pay Page.

Reporting on Multiple Seniority Pay Components

The Multiple Seniority Components report lists all multiple seniority rate codes in workers' compensation packages. This process enables you to check whether the multiple seniority rate codes are appropriate for a worker.

The report checks worker compensation packages for multiple seniority rate codes. If it finds multiple seniority rate codes, the process lists the EmplID (employee ID), the name of the worker, the seniority rate codes, and the corresponding seniority-level information associated with the worker. The report also 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.

For more information about the Multiple Seniority Components report, see the Generating a Multiple Seniority Components Report.

Understanding Compensation Defaults

When you hire a worker or when you update a worker's Job record, the system enters default compensation information in the job record or leaves the compensation fields blank for manual entry. The source of the default compensation depends upon how you set up salary plan defaults in the system and/or the nature of the employee's job change.

Changing a Compensation Package

Recall that every job row has a corresponding compensation package. If you change information in a compensation package, subsequent job compensation rates are not updated. You must go in and change that information manually.

Changing the Job Code at Hire

When you change the job code at hire, the system inserts any salary plan/grade/step associated with the new job code as the default. The system deletes any existing salary plan/grade/step components in the employee's compensation and inserts any salary step components for the new salary plan/grade/step as the default. Here is a more detailed summary of the defaulting scenarios that are possible at the time of hire:

- Only a salary plan is associated with the job code.
- The system inserts the salary plan as the default, and leaves the job compensation information fields and the compensation record blank so that you can manually enter that information.
- A salary plan and salary grade are associated with the job code.

- The system inserts the salary plan/grade and grade entry date as the default, and leaves the job compensation information fields and the compensation record blank so that you can manually enter that information.
- A salary plan, grade, and step are associated with the job code.
- The system inserts the salary plan/grade/step and grade/step entry dates as the default information. If step components exist for the salary step, the system inserts the step components as the compensation components and uses them to calculate job compensation information fields (such as compensation rate, change amount/percent, annual/monthly/hourly rate, and compa-ratio).
- Base rate codes are associated with the job code, and the compensation record is not filled with salary step components when the user opens the compensation page.
- The system inserts the base rate codes associated with the job code as the default on the compensation record, and uses the compensation components to calculate the job compensation information fields.
- The compensation record is already filled with salary step components.
- The system leaves the compensation record and compensation information fields as is.

The system enables you to associate either base pay components or salary step components with the job code, but not both. When changing the job code, therefore, it is not possible for both the base pay components and the salary step components to default in from the job code table.

Changing the Job Code After Hire

When you change the job code after hire, base rate codes associated with the job code do not default. However, if a salary plan/grade/step is associated with the job code, the following defaulting scenarios occur:

- Only a salary plan is associated with the job code.
- The system inserts the salary plan as the default, blanks out the salary grade/step fields, and removes the step components of the previous salary plan/grade/step from the compensation.
- A salary plan and salary grade are associated with the job code.
- The system inserts the salary plan/grade and grade entry date as the default, blanks out the salary step fields, and removes the step components of the previous salary plan/grade/step from the compensation.
- A salary plan, grade, and step are associated with the job code.
- The system inserts the salary plan/grade/step and grade/step entry dates as the default. The system inserts the step components as compensation components and uses them to calculate job compensation.

Changing the Salary Plan/Grade/Step

If you modify the salary plan at or after hire, and a salary grade and step are defined for the new plan, the system inserts the new step components as the default, and they replace the step components of the old plan. If a salary grade and step are not defined, the system erases the salary grade/step field values. In more detail, if you enter a salary plan, grade, or step, the following defaulting occurs:

- Salary grade/step exist for the new salary plan.

  The system recalculates the new salary plan/grade/step combination.

- Salary grade/step do not exist for the new plan.

  The system blanks out salary grade/step, leaving the compensation and job compensation information fields as-is.

- You enter a salary grade.

  The system inserts grade entry date as the default and blanks out the job salary step fields and the job compensation information fields.

- You enter a salary step.

  The system inserts step entry date as the default. The system also inserts the step components as compensation components, and uses them to calculate job compensation.

Changing the Location

When you change the location at or after hire, the system inserts any salary plan information associated with the location as the default. If no salary plan is defined, the system erases the salary plan field values. In more detail, if you enter a location or the location defaults due to the department:

- A salary plan is associated with the location.

  The system inserts the salary plan as the default.

- A salary grade or salary grade/step already exist in the job page.

  If the particular grade/step are defined for the new salary plan, then the system recalculates this new salary plan/grade/step combination. If the particular grade/step are not defined for the new salary plan, the system blanks out the grade/step fields and keeps the existing compensation package.

Changing the DeptID

When you change the deptID at or after hire, any location and salary plan defined for the deptID default. If no location or salary plan are associated with the deptID, the system erases location and salary plan field values.

- You enter a department.

The system inserts the department Entry Date as the default.

- A location is associated with the department.

  The system inserts the location as the default. It also executes the location defaulting, as if you had manually changed the location. So just as in the Changing the Location discussion:

  - If a salary plan is associated with the location, the system inserts the salary plan as the default.
  - If the particular grade/step are defined for the new salary plan, then the system recalculates this new salary plan/grade/step combination. If the particular grade/step are not defined for the new salary plan, the system blanks out the grade/step fields and keeps the existing compensation package.

CHAPTER 12

Working with Multiple Jobs

Employees who hold more than one job at the same time create unique requirements for PeopleSoft Human Resources Management System. If your organization enables an employee to hold more than one job at the same time, you must be able to combine the employee's job data in order to comply with regulatory requirements, determine benefit and pension eligibility, and calculate deductions and credits for payroll processing.

PeopleSoft's Multiple Jobs feature enables you to handle many of the challenges faced by your organization as a result of concurrent jobs.

Overview of Multiple Jobs

Multiple Jobs enables you to hire an employee into more than one job at any given time. For this section, let's use the example of an employee who works at a university with a hospital. For tax and legal reasons, the university and hospital are set up as separate companies. Our employee holds three concurrent jobs: as a professor at the university, a dean at the university, and a physician at the hospital.

You also want to turn on multiple job functionality if your organization sends employees on international assignments. PeopleSoft Human Resources treats each assignment as a separate job, with its own employment and benefit data.

In this section, we discuss how Multiple Jobs works within People Soft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Payroll for North America, and PeopleSoft Pension Administration to handle an employee's concurrent jobs.

Impact of Multiple Jobs on PeopleSoft Human Resources

When an employee holds more than one job, each job must have its own set of employment and job data. When you enter an additional job, you need to make two decisions:

- Which of the employee's jobs is the primary job for reporting purposes.

  You don't have to designate a primary job, but you may want to, because this ensures accurate affirmative action statistics and other data required for government reporting.

- Whether the employee's jobs will share a benefits program or have separate benefits.

  The system gives you great flexibility in mixing and matching jobs and benefits programs.

In other ways, PeopleSoft Human Resources treats an additional job the same way in which it treats the employee's first job.

For more information about working with multiple jobs in Human Resources, see Adding Add Concurrent Jobs to Menu. For more information about the role of multiple jobs in tracking global assignments, see Starting New Assignments.

Impact of Multiple Jobs on PeopleSoft Base Benefits

Using the example of the employee hired as a professor, a dean, and a physician, let's look at some of the benefit-related issues regarding multiple concurrent jobs:

- Which job do you want to be considered as the employee's main or primary job?
- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- Which jobs do you look at for calculating deductions and contributions?
- How do you want the deductions or contributions calculated?
- When do you take deductions and when do you apply credits?

Designating the Primary Job for Benefits

You may want to base an employee's eligibility for benefits upon a single job. This is called the Primary Job (not to be confused with the Primary Job for HR reporting purposes mentioned in the HR section). When a person is hired into a position, the system will automatically flag that job as primary based on rules that you set up. This flag is stored in a table called Primary_Job. As the employee is hired into other concurrent positions, the system will turn this flag on or off based on the rules you established.

For example, here is what the primary jobs table would look like for the professor/dean/physician:

Job Title	***Employee Record***	***Benefit Record***	***Primary Job?***
Professor	0	0	Yes
Dean	1	0	No
Physician	2	1	Yes

Primary job records are effective-dated and at any point in time, only one job can be designated as the primary job for a specific benefit record.

For more information on setting the rules for primary job flags, see Multiple Jobs Options Page.

The primary job flag is used throughout the system to:

- Determine when a deduction should be taken.
- Identify the job that will provide the service date and the termination date.

Grouping Jobs Together To Determine Benefit Eligibility

When employees hold multiple concurrent jobs, they may be eligible for different offerings of benefits, based upon the combination or mix of the jobs that they hold. Conversely, they may be eligible for certain offerings based solely on the fact that they hold a particular job.

Multiple concurrent jobs introduces the concept of a Benefit Record Number. If an employee is eligible for multiple sets of benefits (or possibly multiple Benefit Programs), then we need to be able to enroll the employee in these benefits according to the set of benefits that corresponds to a grouping of one or more jobs. The Benefit Record Number is the mechanism used to group concurrent jobs together for benefits eligibility and enrollment purposes.

When Multiple Jobs is turned on, all enrollments for Benefits are specific to a particular Benefit Record Number.

Designating the Primary Job for Benefits

You may want to base an employee's eligibility for benefits upon a single job that you designate. This is called the Primary Job (not to be confused with the Primary Job for HR reporting purposes mentioned in the HR section). The system also uses the Primary Job to associate payroll deductions for benefits, with a specific job (this is discussed later). Each Benefit Record Number (group of jobs) that you designate for an employee has one job designated as the Primary Job.

The designation of an employee's Primary Job is effective-dated, and you may manually change this designation at any time from a data maintenance page. In addition, because the actions of starting a new concurrent job or terminating an existing job generally affects the determination of the employee's Primary Job, you can define rules that redesignate the primary job when one of these job actions is entered into the system.

For other actions (such as a job moving from full-time to part-time status), you can also indicate whether the system sends a work list entry to the Benefits Administrator through Workflow for review.

Maximum Number of Concurrent Jobs

An employee can hold a maximum of 50 concurrent jobs across all benefit record numbers. There is a limit of 50 different benefit record numbers that can be processed by payroll on a single paycheck.

Calculating Benefit Deductions

The same grouping method used to determine eligibility could be used when calculating deductions. Jobs can be grouped together when you need to calculate a deduction that is based on the employee's salary. Typically, this involves the calculation of coverage and related premiums for Life and Disability plans that are based on the employee's salary or compensation rate:

- Calculate the coverage and deduction based on the salary of the Primary Job

- Calculate the coverage and deduction based on the sum salaries from a group of jobs

When you designate the Primary Job for a Benefit Record, the system ties all deductions for Benefits associated with this Benefit Record to this job. That is, Benefits deductions are only taken from checks by which the associated Primary Job is paid. This assures that deductions are taken at the proper frequency when the individual jobs in a group are paid on different frequencies or on separate checks.

Whenever jobs are combined into a single check for all benefits record numbers, the benefits deduction for different benefit record numbers will print as separate detail lines.

Applying Regulatory Contribution Limits

When applying regulatory limits to contributions for Savings Plans, the system takes into account all of the earnings and deductions that the employee has across multiple jobs, not just the job(s) associated with the particular plan being limited.

Retro Deduction and Imputed Income Adjustment Processing

Both of these processes perform a re-evaluation of deductions over a specified period of time. That is, using the current state of the database (benefit and general deduction enrollments, job history and primary job assignment), the system re-calculates deductions and compares them to the deductions originally calculated and taken. In a multiple job environment, it’s important to understand that the primary job indicators play an important role in the calculation of deductions. Therefore, if changes are made to the primary job history that affect confirmed pay periods, and these changes involve a shift of pay frequencies, then the system may calculate a different deduction amount for this period than was originally calculated. During Retro Deduction and Imputed Income Adjustment processing, the system drives the calculation off of the primary job history for the adjustment period.

Percent of Gross Deduction Limits

Calculation rules can be set up with a percent of gross limit applied to a benefit deduction. In addition, rate tables can specify the portion of a deduction that is subject to this percent of gross limit. Now that earnings from multiple jobs with different benefit record numbers can be combined into a single check, could result in a different gross earnings amount being calculated than when these jobs were not combined into a single check.

When applying the Percent of Gross limit to a deduction, the system will use the entire gross earnings from the check, as opposed to just the gross earnings attributable to the jobs with the same benefit record number as the enrollment for the deduction being limited. This could result in different deduction amounts being calculated than was previously calculated.

For more information about setting up and using multiple jobs, see Setting Up and Managing Multiple Jobs.

Impact of Multiple Jobs on PeopleSoft Benefits Administration

The major impact multiple jobs have on PeopleSoft Benefits Administration is on benefit eligibility and event triggering.

- Which jobs do you look at for benefits eligibility, and how should they be evaluated?

- If you have a change affecting one job, how do you determine impact it has on the other jobs?

Determining Eligibility With Multiple Jobs

The system uses Eligibility Rules to determine if an employee meets the organization's rules for enrollment into a benefit program or option. Eligibility Rules are composed of three major components: Eligibility Criteria, a Grouping Method, and an Evaluation Method. Each of these three components is tied to a particular Eligibility Field within an Eligibility Rule. Eligibility Criteria defines the specific data values for the field that determine eligibility or ineligibility. The employee's Primary Job indicator and Include for Eligibility flags from the Primary Jobs table, together with the Grouping Method and Active Only, define which jobs should be evaluated. Finally, the Evaluation Method component of the rule defines how the group of jobs should be evaluated.

When defining Eligibility Rules, the Grouping Method, Evaluation Method, and Active Only fields are visible on the page only if Multiple Jobs processing is active.

With multiple jobs, you want to specify a Grouping Method. Grouping Method enables you to define which jobs to include when the system is evaluating the benefits for which an employee is eligible:

- **AllFlagged.** Group all jobs with the Include for Eligibility flag on Primary Jobs selected for all benefit record numbers.

- **Flagged BR.** Group all jobs with the Include for Eligibility flag on Primary Jobs selected within the benefit record number of the event.

- **Primary.** Look at only the primary job within the benefit record number of the event.

When determining which jobs should be grouped, the Active Only flag from the eligibility rule is also used. If this flag is ON, then only those jobs with an active Empl_Status (A,L,P,W,S) are included when the Grouping Method is All Flagged or Flagged BR.

Another component of the eligibility rule is Evaluation Method. Evaluation Method enables you control how the jobs that are selected from the grouping method are evaluated against the eligibility criteria, when determining whether the employee is satisfies the eligibility rule:

- **One or More.** At least one job in the group must satisfy the rule.

- **All.** All jobs in the group must satisfy the rule.

- **Sum.** The sum of the eligibility field's data value from all jobs in the group must satisfy the rule.

Let's use the employee with three jobs to see how all the information comes together to determine eligibility. The event we're processing is for Benefit Record 0, and this is the Eligibility Rule for the FTE field:

- Minimum FTE must equal 1.
- Grouping method is AllFlagged.
- Active Jobs Only flag is Y

Job	*Employee Record #*	*Benefit Record #*	*Primary Job*	*Include for Eligibility*	*Include for Deductions*	*FTE*
Professor	0	0	Yes	Yes	Yes	.50
Dean	1	0	No	Yes	Yes	.25
Physician	2	1	Yes	Yes	Yes	.25

All jobs are Active, so the group consists of all of the jobs. The FTE adds up to 1.0 across these jobs, so this employee meets the eligibility rule.

Now suppose that the Grouping Method is All Flagged BR. In this case, the group of jobs we evaluate is Empl_Rcd 0 and Empl_Rcd 1. The sum of these FTE fields is .75, which does not meet the eligibility criteria.

For more information on Eligibility Rules, see Setting Up Eligibility Rules.

Benefits Credits and the Primary Job

PeopleSoft Benefits Administration posts credits for benefits to the Additional Pay tables under the employee record number that is equal to the benefit record number. During a pay calculation, the system only loads deductions for benefits if the primary job for the benefit record is being paid on the check being calculated. Likewise, when loading additional pay for benefits credits, the credits posted under any employee records number for a particular Benefit Record are only loaded to the paysheet of the Primary Job for that benefit record.

This means that during a pay calculation, the system, while processing a particular job, determines whether this is the primary job for the associated benefit record number. If this is the primary, the system searches for the additional pay data, looking for any benefits credits entries.

- Add'l Pay Reason = 'BAS' for *any* Empl_Rcd that is assigned to this Benefit Record

All entries found are loaded to the paycheck. If this is not the primary job, no benefit credits are added to the check. This ensures that there is no "double dipping" of deductions, and that the credits for benefits always appear on the same check as the corresponding deductions.

Triggering Events with Multiple Jobs

The primary job drives the processing of an event for a specific benefit record number. This job must have a benefit system flag set to BA – Benefits Administration. The primary job provides the company ID and the BAS Group ID data for the processing schedule.

There are three main categories of events: events that are triggered though a direct change to employee data; events that are manually inserted into the system through the BAS Activity page; and passive events.

If changes are made to an employee's Jobs data that impacts the employee's primary job designation, include for eligibility flag, or include for deduction flag, the system automatically generates an entry into the BAS Activity table for a new type of trigger, the (MJ) MultiJob trigger These triggers are generated with a Bas_Action code of MJC (MultiJob Change), which resolves to the system Miscellaneous event, if a specific Event Class is not set up for this Bas_Action code. Events that are created as a result of a change to the Primary Jobs table process through the system as (MSC) miscellaneous events.

Some of these trigger types may affect an employee's eligibility for benefits across all Benefit Records. For example, the (TP) trigger (Pers_Data_Effdt) is generated whenever you change an employee's address. Because the Employee Address is not related to any particular Job (or Benefit Record), this change could affect the eligibility for benefits across all of that employee's Benefit Records. Changes to the employee's age are not specific to a particular job. Because these types of changes can affect all Benefit Records for an employee, the system automatically creates an event for each Benefit Record held by the employee when processing one of these triggers. The is also true for Passive Birthdate triggers (PB) generated as a result of processing Passive Events.

What happens is the system explodes the original trigger into a set of new triggers, one for each Benefit Record. You won't see these exploded triggers in the BAS Activity table, because they're normally processed in the same Event Maintenance run in which they're created. Each of these exploded triggers generates a new Event, each having the same Event Class as the original trigger.

Other expanded triggers are generated as a result of options that you configure. Because you can define eligibility rules with Grouping Methods that cross Benefit Record boundaries, we can't assume that the data changes generating other types of triggers won't have an impact upon other Benefit Records.

For example, suppose you change the example employee from Full Time to Part Time in one job. The three concurrent jobs provide multiple Benefit Records. As a result of changing the Full/Part Time indicator, the system automatically generates a (TJ) Job trigger in the BAS Activity table. This trigger contains the Empl_Rcd and corresponding Benefit Record of the job that is changed. If we have any eligibility rules that use a Grouping Method of All Flagged, meaning that jobs from any Benefit Record can contribute eligibility information for this Benefit Record, we need to expand these triggers as well.

You need to carefully consider whether you want to activate this trigger explosion. It creates a certain amount of overhead for the system to maintain and process. If you know that you have eligibility rules that cross Benefit Record boundaries, then you should activate Automatically Create Triggers for All Benefit Records for Job Triggers, Passive Service Triggers, and MultiJob Trigger on the Multiple Jobs Options page. If you know that you have no such eligibility rules in your system, you can safely turn the explosion off for each of these trigger types.

For more information about setting up triggers for all benefit records, see Multiple Jobs Options Page.

Passive Events and Multiple Jobs

Service based eligibility was based on the service date for the primary job. Because of jobs outside of a specific benefit records can be grouped together, eligibility based on service date can come from the primary job or any other job within or outside a specific benefit record number. Because of this, this system create a BAS Activity trigger for each job it finds during Passive Event processing that meets the passive service evaluation. These are called PS triggers.

Marking Events for Reprocessing

The system will now be able to better identify events that should be considered for re-processing. Prior to this release, events were flagged for re-processing consideration whenever a Bas_Activity trigger was processed, and events existed that used a later Job or Pers_Data_Effdt row for eligibility purposes. In the prior releases, only one Job row could contribute to eligibility, so in the event that Standard Hours was changed on the “non-primary” Job row, and standard hours accumulation was used for eligibility, the system would not detect that existing events may need to be re-processed. We have changed this flagging mechanism to search for, and flag all events for the employee that may have used the Job row indicated in the trigger. Although we can’t be sure that the Job row was actually used for eligibility purposes, we eliminate the risk of not flagging an event that should be considered for re-processing.

Impact of Multiple Jobs on PeopleSoft Payroll for North American

Primary Pay Group

When an employee has jobs in more than one pay group, you can designate a primary pay group that controls when deductions are taken from the employee’s earnings and when instructions for deduction overrides apply. The employee’s primary pay group is also the pay group for which a consolidated pay sheet is built, if you activate the single check feature described below.

Single Check

If you activate the Single Check for Multiple Jobs feature in PeopleSoft Payroll for North America, you can produce a single check for employees with multiple jobs across pay groups within the same company. During the Paysheet Calculation process, the system creates a consolidated pay sheet for the employee’s primary pay group. The pay sheet includes all of the employee’s FLSA calculations, taxes, benefits, and general deductions for all jobs with the same period end date; check date; FLSA period, if applicable; and payroll cycle (on- or off-cycle). Pay run IDs and pay frequencies associated with the jobs can differ.

Deduction Limits

Limits for general deductions and benefit deductions can vary by job. PeopleSoft Payroll for North America automatically adjusts the Current Goal Balance for the appropriate jobs when deductions are taken.

Union Dues

Union dues are deducted from earnings only when the job that's assigned the corresponding union code is paid.

FLSA Overtime Rules

PeopleSoft Payroll for North America fully complies with FLSA overtime rules for non-exempt employees. If a non-exempt employee has other exempt or non-exempt jobs within the same organization, the system automatically calculates the correct overtime for any extra hours worked.

For more information about the multiple jobs with PeopleSoft Payroll for North America, see PeopleSoft 8 Payroll for North America PeopleBook.

Impact of Multiple Jobs on PeopleSoft Pension Administration

Beginning with PeopleSoft 8, PeopleSoft Pension Administration supports the use of multiple concurrent jobs, instead of relying on Employment Record number zero for much of the information used in the pension benefit calculations.

Multiple Jobs and the Eligibility Process

The eligibility process always produces two primary results: a confirmation of whether an employee has ever been eligible for pension benefits and a timeline of the specific periods of eligibility and ineligibility.

For a single job environment, producing these results is a simple matter of examining an employee's only job record history. If an employee has multiple concurrent jobs, the system determines plan eligibility based on all jobs. Essentially, the system considers employee to be eligible for a given period if any of the jobs are eligible.

Multiple Jobs and the Primary Job Record

In a single job environment, the system only looks at record number zero when processing or when resolving database aliases, and it ignores all other records. Record number zero is considered the only primary job record allowable. This is not always useful for users of multiple concurrent jobs, because an employee's first job record is not always be the best primary record.

When you use multiple jobs for PeopleSoft Pension Administration, the system does not automatically select Employment Record number zero as the primary record. It examines all of an employee's records and selects a primary record by choosing the first record it comes across in the following prioritized order of categories:

1. Overrides
2. Covered Active
3. Covered Inactive
4. Any Active

5. Any Inactive

If it finds more than one of any of the above, it selects the lowest-numbered record of that category.

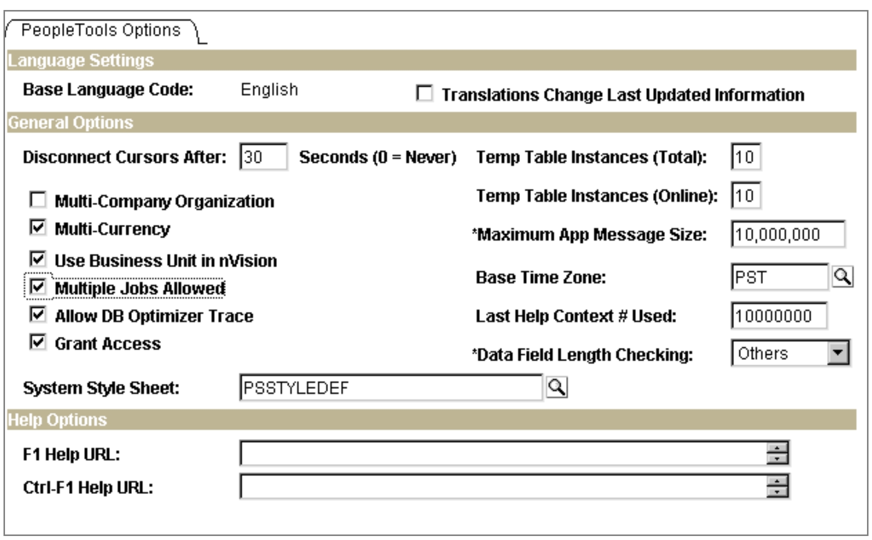
You can accept the system-calculated primary record or override it with your own definition of which job record should be the primary record. You do this by configuring your definition of which actions make a job active or inactive or by using the Primary Job Overrides page to designate a specific record of your own choosing as primary.

For more information on using multiple concurrent jobs with PeopleSoft Pension Administration, see Defining Plan Eligibility or Defining the Primary Job Record and Multiple Jobs Considerations.

Activating Multiple Jobs

Activate Multiple Jobs if employees can have multiple, concurrent job assignments in your organization, or any time you need to maintain different sets records for the same person. If you use this option, the system enables the use of the Employment Record (Empl_Recd) field when searching for data and opening various pages throughout PeopleSoft Human Resources, and displays the employment record information on the pages themselves.

You activate Multiple Jobs by selecting Multiple Jobs Allowed on the PeopleTools Options page. Remember to reset your Application Server, so the system can pick up your change.



PeopleTools Options page

For more information on allow multiple currencies and company organizations, see Setting Up HRMS Options on the PeopleTools Options Page.

Adding Add Concurrent Jobs to Menu

If you turn on **Multiple Jobs Allowed,** you must add **Add Concurrent Job** as an option to the Use menu in the Administer Workforce menus. You complete this task using PeopleTools Object Security.

For more information on how to add the **Add Concurrent Job** option to your Use menu in the Administer Workforce menus, see Updating Workforce Information and Object Security.

Changing Search Views for Base Benefits

In a multiple job environment, an employee may have more than one benefit record number with one or more jobs associated with the different benefit programs. When searching for employee data, under the standard search views it may become confusing on which record you want to look at. Therefore, when multiple jobs is activated the system needs to use alternate search views that link to benefit record number rather than employment record number.

Operator Security does not change. No special consideration is given to the Primary Jobs in the search views. If any job within the benefit record passes the security criteria for the operator, then the benefit record is available for enrollment activity.

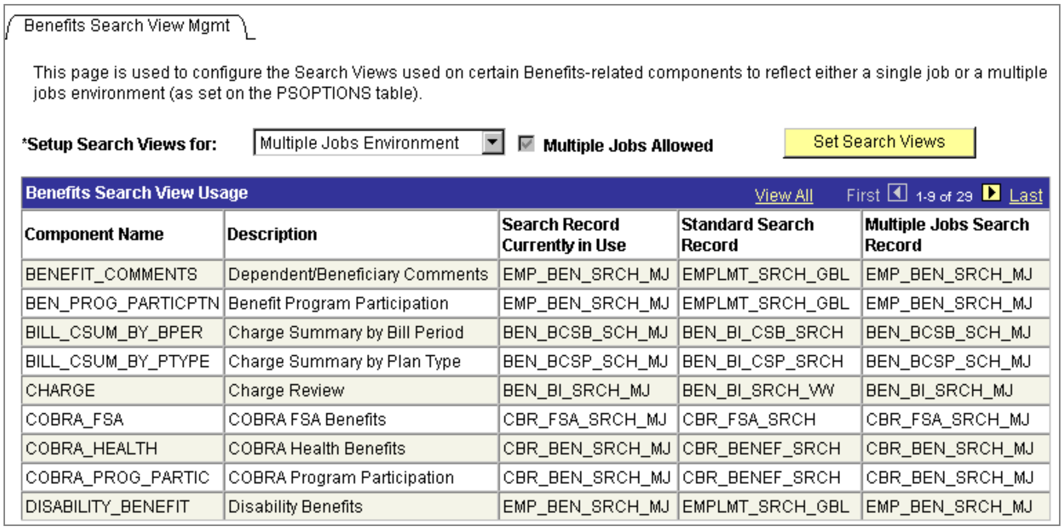
If you have set up Fast Security Views, you may need to reinstall. After making this change, the System Administrator should modify the search views on all of the Base Benefits components, changing the Search View to either EMPL_BEN_SRCH, or FAST_EMP_BEN_2 (depending upon whether your site uses regular or “fast” security).

If you set up Fast Security Views to use you may need to set that up again. To set up Fast Security Views, see Creating Fast Security Views in PeopleSoft HRMS.

Benefits Search View Mgmt Page

Usage	Use the Benefits Search View Mgmt page to the search views from a single job environment to a multiple job environment.
Object Name	BN_SRCH_VW_MAP
Navigation	**Define Business Rules, Define Base Benefits, Setup, Benefits Search Vw Management, Benefits Search View Mgmt**
Prerequisites	None
Access	None

Requirements	


Benefits Search View Mgmt

This page is used to configure the Search Views used on certain Benefits-related components to reflect either a single job or a multiple jobs environment (as set on the PSOPTIONS table).

*Setup Search Views for: Multiple Jobs Environment   Multiple Jobs Allowed   Set Search Views

Benefits Search View Usage   View All   First 1-9 of 29 Last

Component Name	Description	Search Record Currently in Use	Standard Search Record	Multiple Jobs Search Record
BENEFIT_COMMENTS	Dependent/Beneficiary Comments	EMP_BEN_SRCH_MJ	EMPLMT_SRCH_GBL	EMP_BEN_SRCH_MJ
BEN_PROG_PARTICPTN	Benefit Program Participation	EMP_BEN_SRCH_MJ	EMPLMT_SRCH_GBL	EMP_BEN_SRCH_MJ
BILL_CSUM_BY_BPER	Charge Summary by Bill Period	BEN_BCSB_SCH_MJ	BEN_BI_CSB_SRCH	BEN_BCSB_SCH_MJ
BILL_CSUM_BY_PTYPE	Charge Summary by Plan Type	BEN_BCSP_SCH_MJ	BEN_BI_CSP_SRCH	BEN_BCSP_SCH_MJ
CHARGE	Charge Review	BEN_BI_SRCH_MJ	BEN_BI_SRCH_VW	BEN_BI_SRCH_MJ
COBRA_FSA	COBRA FSA Benefits	CBR_FSA_SRCH_MJ	CBR_FSA_SRCH	CBR_FSA_SRCH_MJ
COBRA_HEALTH	COBRA Health Benefits	CBR_BEN_SRCH_MJ	CBR_BENEF_SRCH	CBR_BEN_SRCH_MJ
COBRA_PROG_PARTIC	COBRA Program Participation	CBR_BEN_SRCH_MJ	CBR_BENEF_SRCH	CBR_BEN_SRCH_MJ
DISABILITY_BENEFIT	Disability Benefits	EMP_BEN_SRCH_MJ	EMPLMT_SRCH_GBL	EMP_BEN_SRCH_MJ

Benefits Search View Mgmt page

Setup Search Views for Select the search view you want to use: ***Multiple Job Environment*** or ***Single Job Environment***.

Multiple Jobs Allowed If selected, this indicates that multiple jobs was activated on PeopleTools Option page.

Set Search Views Click this button to update the **Benefits Search View Usage** grid.

If you select ***Multiple Job Environment***, the **Multiple Job Search Record** column will be copied to the **Search Record Currently in Use** column.

If you select ***Single Job Environment***, the **Standard Job Search Record** column will be copied to the **Search Record Currently in Use** column.

Benefits Search View Usage This section displays a list of components that must have the search view changed in order to accurately present multiple job employee data.

Component Name This column lists the name of the component.

Description This column lists the component description.

Search Record Currently in Use This column lists the currently used search records.

Standard Search Record This column lists the search records used for a standard single job environment.

C H A P T E R 1 3

Working With Groups

The Group Build feature in PeopleSoft 8 Human Resources gives you a standardized way to create groups of employees and non-employees. Once you've created a group, you can use it for a wide variety of purposes

Overview of Working with Groups

There are many times when you may want to apply a business process to a group of individuals that crosses job, department, or even company lines. For instance, you may want to offer a special bonus plan to all of your organization's Research and Development teams. This group includes everyone in Departments 10200 though 10500. You can use the Group Build feature to create a group that consists of Departments 10200-10500 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 Plan Salaries module. You only need to define the group once.

You can define groups with the Group Build component and use the groups in PeopleSoft Payroll for North America, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and any of the following PeopleSoft Global Human Resources modules:

- Salary Planning
- Salary Forecasting for France (La Masse Salariale)
- Total Compensation Reporting
- Variable Compensation
- Employee Review
- Training Administration

Creating a Group in PeopleSoft 8 Human Resources

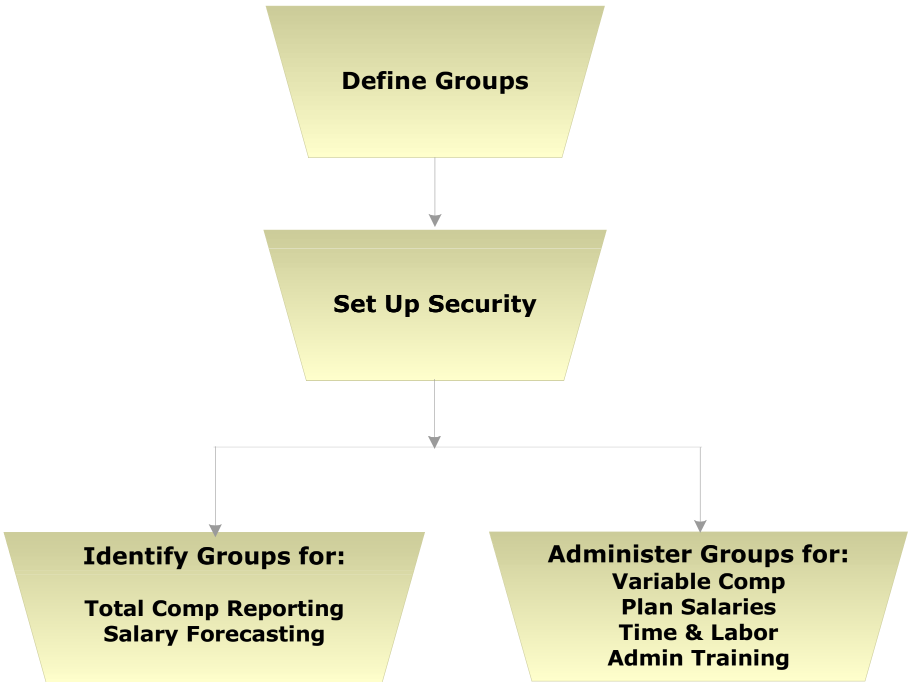
Creating a group in Human Resources involves three steps. All three steps are designed for experienced users who are familiar with PeopleSoft Global Human Resources record and field structures.

To create a group:

1. Define the population that will belong to the group.

2. Set up group security.

3. If necessary, refine dates and other module-specific parameters in individual PeopleSoft modules.



Using Groups

For example, suppose you want to apply the same employee review to all employees in the following group:

- Job Code 1001 or 1002
- Department 10200
- Company CCB.

You would use Group Build pages to select the records, fields, and values that define the group. You'd also use Group Build pages to set up the group's security. Then you'd set up the group's date parameters in the Planning Salaries module.

If you want to use the same employee review group later in the Variable Compensation module, you don't have to repeat the work of building the group. You simply link the existing Group ID to a node in the Variable Compensation Group Tree within the Variable Compensation module.

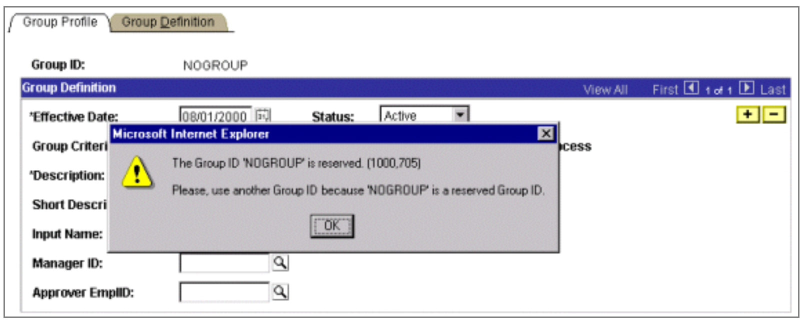
Creating Groups That Include Non-Employees

You can create groups that include both employees and any non-employees who have Employee IDs and Personal Data records in the system. To select non-employees in groups, use the value ***N*** (Non-employee) in the **Personnel Status** field (PER_STATUS).

If you use the Monitoring Health and Safety module, your system may include a few non-employees who do not have Personal Data Records, but instead are tracked in a special record called NE_PERSONAL_DTA. These non-employees are not eligible for inclusion in groups.

Groups for Variable Compensation

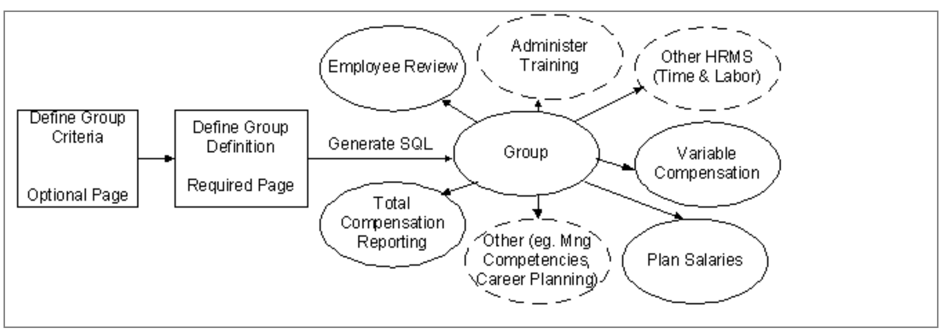
Group build comes with a "No Group" Group ID. This group is required for Variable Compensation processing. The Variable Compensation module handles plans with or without groups. The Group ID "NOGROUP" is used for Variable Compensation plans without groups. Consequently it is a reserved Group ID and you cannot create a Group ID = "NOGROUP" in the Group Build module. If you try to do so, you get the following message upon saving the Group Definition component:



Message received when trying to change the "NOGROUP" Group ID

Setting Up Group Definitions

The first step in creating a group is to define its membership.



Steps in Setting Up Group Definitions

To define a group's population:

1. (Optional.) Create a Group Criteria on the Group Criteria page.

Group Criteria are like building blocks of records and fields that you can use over and over to create different groups. For example, if your organization operates several business processes based on employees' department and union membership, 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 different groups.

RECORD NAME	***FIELD NAME***
Job	Department
Job	Union Code

You can create a Group Criteria ID using any field from the following six records:

- Job (JOB)
- Compensation (COMPENSATION)
- Employment (EMPLOYMENT)
- Personal Data (PERSONAL_DATA)
- Effective-dated Personal Data (PERS_DATA_EFFDT).
- Time Employee Time Profile from Time and labor (TL_EMPL_DATA)

For more information about the difference between Personal Data and Effective-dated Personal Data, see Updating Personal Data.

2. (Optional.) Attach a Group Criteria ID or Query to the group definition on the Group Profile page.

The Group Profile page gives you the option of using a Group Criteria ID and Queries as part of a group's definition.

- **If you use a Group Criteria ID** in the group definition, you can also define additional records, fields, and field values on the Group Definition page. You can refine the group even further by attaching a Query definition. However, you can only use one Group Criteria per group.

- **If you use the Query function** to refine the group definition, you can choose an existing Query or use the Query tool to create a new Query. Using Queries gives you access to a much broader set of system records than the six records available through the Group Criteria or Group Definition pages. However, a Query must follow certain rules to be used in a group definition. You can attach only one Query to a group definition.

For more information about creating and using Queries, see PeopleSoft Query.

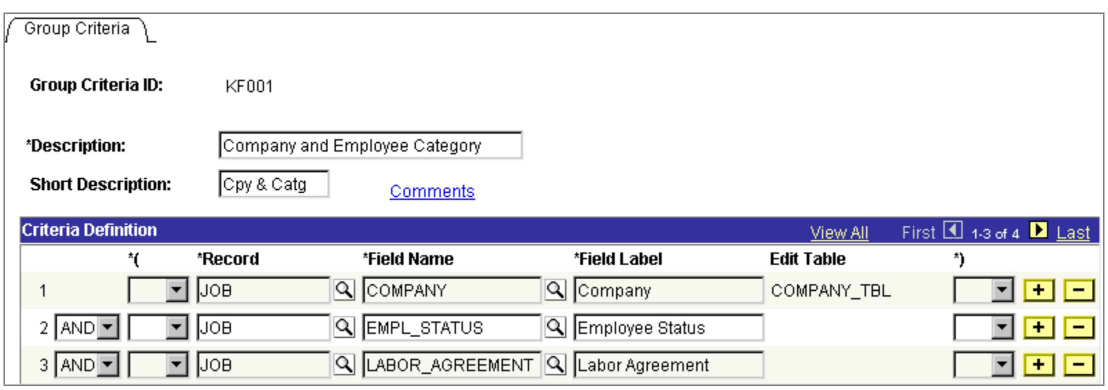
3. (Required.) Define the group by selecting records, fields, and field values on the Group Definition page.

If you've 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 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.

Group Criteria Definition Page

Usage	Optional. Use the Group Criteria Definition page to define the records and fields you want to use to create a Group Criteria ID, a building block that you can combine with other elements to build a more complex group.
Object Name	GB_GRP_CRIT1_TBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Group Criteria Definition, Group Criteria** • **Define Business Rules, Manage Human Resources (USF), Setup, Group Criteria Definition, Group Criteria**
Prerequisites	You should be familiar with relational database concepts and PeopleSoft 8 Human Resources record and field structures.
Access Requirements	Group Criteria ID



Group Criteria Definition page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Short Description, Comments.**

Group Criteria ID The **Group Criteria ID** you entered is displayed.

AND/OR 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 you enter on this page. The valid values are ***AND*** or ***OR.*** The default value is ***AND.***

(Use this field to create sets or subsets of linked records and field names. Using parentheses helps you avoid ambiguity when you create several AND/OR conditions. You can create up to five nesting levels. The system displays a list of valid values. The default value is ***none***.

Record Choose a record name you want to include in the group criteria definition. The system displays a list of valid record names.

Field Name Enter a field name you want to include in the group criteria definition. The system displays a list of valid field names for the record you chose in the previous field.

Note. If you enter a field name that is keyed to other fields, the system automatically displays the other fields 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.

Field Label The system fills in this field when you tab out of **Field Name**. You can change the entry if you want.

Edit Table The system uses edit tables to validate the data 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 tab out of **Field Name.**

) Use this field to complete a nesting statement linking multiple records and fields together. The system displays a list of valid values.

Group Criteria Definition - Comments Page

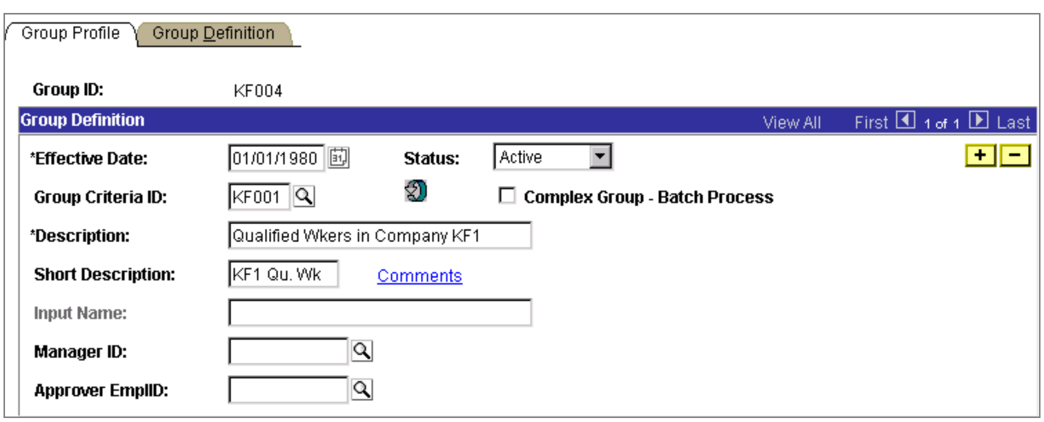
Usage	Use this page to enter free-form comments about a Group Criteria definition.
Object Name	GB_GRP_DEF1_SEC
Navigation	Click the Comments button on the Group Criteria Definition page.

Group Criteria Definition - Comments page

Enter any comments on this page.

Group Definition - Group Profile Page

Usage	Use the Group Profile setup page to attach an existing Group Criteria ID and/or attach a Query to a group definition.
Object Name	GB_GRP_DEF1_TBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Group Definition, Group Profile** • **Define Business Rules, Manage Human Resources (USF), Setup, Group Definition, Group Profile** • **Compensate Employees, Manage Variable Compensation, Setup, VC Group Build, Group Profile**
Prerequisites	If you want to attach a Group Criteria ID or Query to the group definition, you must already have created it.
Access Requirements	Group ID



Group Definition - Group Profile page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, Description, Short Description.**

Group Criteria ID If you want to include an existing Group Criteria in this group definition, enter the ID here. Otherwise, leave the field blank. You can only include one Group Criteria ID in a group.

If you change the Group Criteria ID in this field, click the **Refresh** button to repopulate the Group Definition page with new values.

Complex Group –Batch Process Check this box to select batch processing for complex groups that would 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.

Comments Click this link to enter free-form comments on the Group Build Definition View page. Beneath the **Comments** area, the system displays the records, field names, operators, and values you have defined for this group.

Input Name If you want to include an existing Query in this group definition, enter the Query ID here. Otherwise, leave the field blank.

Warning! When you open the drop-down list in the **Input Name** field, ***all*** of your existing Queries appear. However, the Group Build process only works with Queries that produce a group keyed by Employee ID. Some of the Queries in the drop-down list may not meet this requirement. If you try to run a Query that doesn't produce a group of Employee IDs, the system displays an error message and the Query fails.

For more information about special Group Build considerations creating and using Queries, see Using Queries to Refine Groups. For more information about creating and using Queries, see PeopleSoft Payroll PeopleBooks.

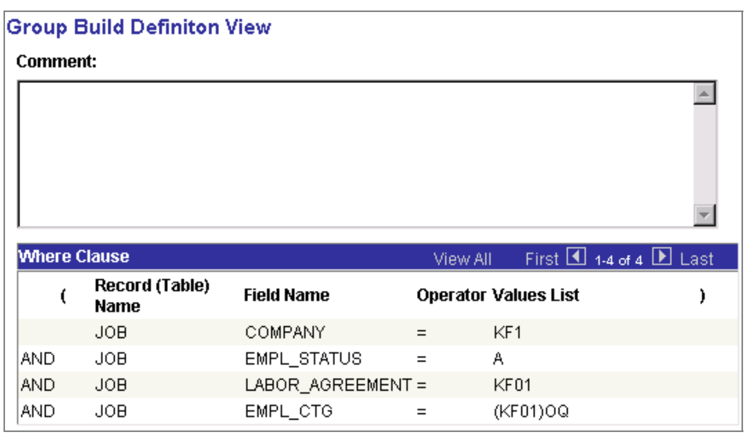
Manager ID Use this field to designate the group's manager, if applicable. For example, if the group you're defining consists of all the employees in Department 10200, you can enter the Department Manager's ID here. You could also use this field to designate the leader of a project team. Variable Compensation uses the Group Manager ID to determine who can access the Award Allocation panel when a plan is managed with groups.

For more information about Variable Compensation, see Managing Variable Compensation.

Approver EmplID If you're planning to use this group in the Variable Compensation Administration by Groups module, use this field to enter the Employee ID of the person who approves awards for this group. The system displays a list of valid values.

Group Definition - Group Build Definition View Page

Usage	Use this page to enter free-form comments about a group and to view the records, fields, values, and operators you've defined for the group.
Object Name	GB_GRP_DEF1_SEC
Navigation	To reach the page, click the Comments button on the Group Definition - Group Profile page.



Group Definition - Group Build Definition View page

Comment Enter in any comments here.

Where Clause Enter in a where clause, if desired. See the field descriptions from the Group Criteria Definition Page.

Using Queries to Refine Groups

Using the Query tool to refine a group in the Group Build pages has two powerful advantages. First, the Query tool gives you access to many more tables than the six available through the Group Build pages. You can choose the fields you want, not just those defined in the standard result table. However, some special rules and restrictions apply.

Inserting the Group Build Query View

When you define a Query that you want to use in a Group Definition, you must insert a special Group Build view in the Query. The system uses this view, GB_QRY_LINK_VW, to merge SQL statements created in the Group Build pages with SQL Statements created by the Query tool.

Group Build Limitations on Queries

When you define a Query to use in group definitions, several special restrictions apply:

- A record you add in QUERY must have at least one criteria.
- You can't define the fields returned by the SQL Statement.
- You can't use Unions.
- You can't use Aggregates.
- You can't use Tree Option as an exclickion.
- You can't use a prompt as an exclickion. You can only use **Field, Exclickion, Constant, In List, Current Date** and **Effective Seq.**

For more information about using Queries to define groups, see Group Build: Technical Details for Developers.

Using the Group Definition Setup Page

The Group Definition Page is the only page you must complete to build a group. You can use this page in combination with the Group Criteria Definition page and Group Profile page, or you can build a group entirely on the Group Definition page. You can use the page in one of the following three 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. You won't be able to change them on this page. To finish defining the group, complete the Criteria parameters by entering the appropriate field values for each field name. You can also add more record, field names, and field values to the definition.

- If you entered a Query on the Group Profile page:

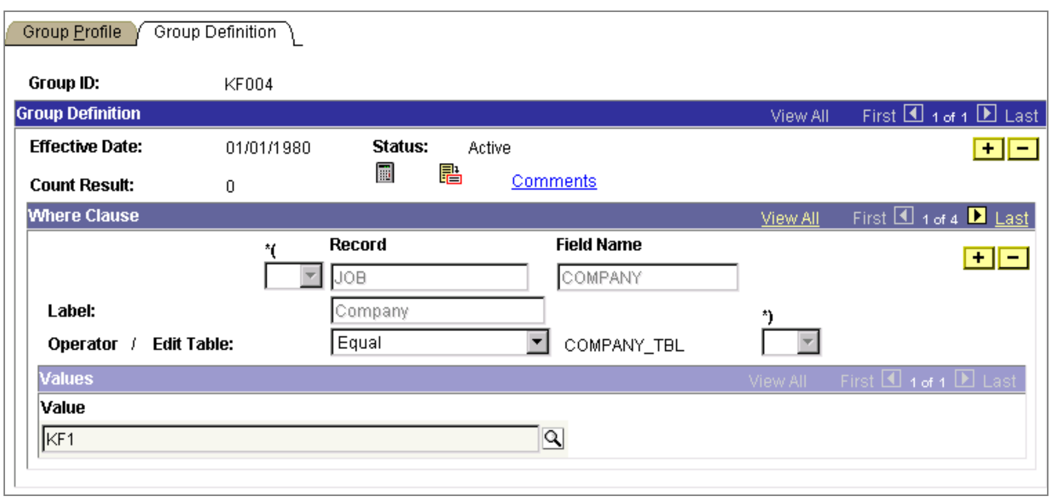
  You can't refine the group if it is based on a Query.

- If you aren't using a Group Criteria ID or a Query:

  You will define the group entirely on this page. Enter all the records, field names, and field values you'll use to build the group.

Group Definition - Group Definition Page

Usage	Use the Group Definition setup page to define records, fields, and field values you want to associate with a group.
Object Name	GB_GRP_DEF2_TBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Group Definition, Group Definition** • **Define Business Rules, Manage Human Resources (USF), Setup, Group Definition, Group Definition** • **Compensate Employees, Manage Variable Compensation, Setup, VC Group Build, Group Definition**
Prerequisites	If you want to attach a Group Criteria ID or a Query to the group, you must have defined the Group Criteria and entered its ID on the Group Profile page before you complete the Group Definition page.
Access Requirements	Group ID



Group Definition - Group Definition page

The **Group ID, Effective Date** and **Status** display at the top of the page.

After you save the page, click the **Count** button to compute how many members are in the group. If you selected the **Complex Group** box on the Group Profile page, clicking **Count** sends the group to the 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 **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 this button to access the Group Result page, where you get a list of all group members.

Comments

Click this link to enter comments about the group on the Group Build Definition View page.

Record

Enter the name of a **Record** 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 from the Group Profile page, you can't change the entry. If the Record you choose is effective-dated, the system asks you to decide whether you want to build the group based on the current information, or based on all the history data. This check occurs when you move out of the field.

For more information about building groups with effective-dated records, see Defining Groups with Effective-Dated Data.

Field Name

Enter the name of a field you want to use to define the group. The system supplies a list of valid values for the Record you entered in the previous 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 previous field. If you entered an effective-dated record and chose to build the group with the current information, the system selects the most current record.

Operator

Use this field to define the field values you want to include in or exclude from the group. See the following Valid Operators table.

Edit Table

The system uses edit tables to validate the data you enter in certain fields. If the **Field** name you entered is linked to an edit table, the system fills in this field.

Note. If the **Field** you entered is keyed to other fields, the system automatically displays the other fields 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 of valid values.

Valid Operators

Operator	***Description***
<	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	
Is Null	The field value = zero
Like	
Max	Maximum
Min	Minimum
Not Btw	Not between
Not Equal	
Not In	Not In List
Not Like	

Operator	**Description**
Not Null	The field value does not equal zero

Defining Groups with Effective-Dated Data

Several of the records you can use to define a group are effective-dated:

- Job
- Effective-Dated Personal Data
- Time and Labor Employment Data.
- Compensation

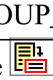
The system stores both current and historical data for these records. That means you can build groups with them in two different ways:

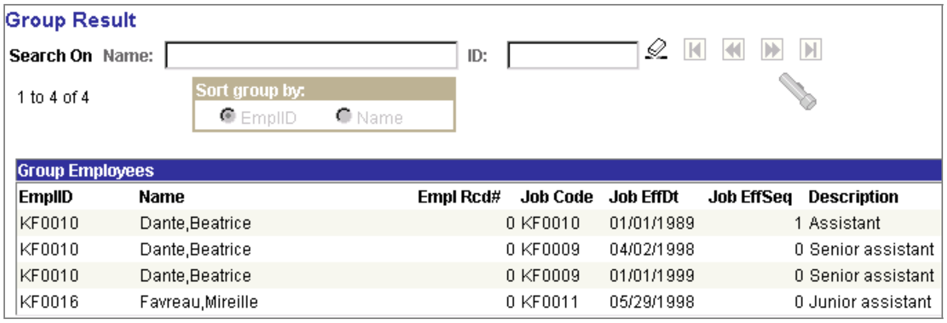
- **Using the current data** – for example, selecting only an employee's current job and leaving out the previous jobs. In this case, the system automatically adds the condition ***Current*** to the record's effective date.
- **Using all the history data** – for example, including all the jobs the employee has held in your organization. In this case, the group may 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 choose to link the two records by effective date. The following table shows the valid ways of linking two effective-dated fields.

Operator	**Description**
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

Group Definition - Group Result Page

Usage	Use this page to view and sort the members of groups you've built in the Group Build pages.
Object Name	GB_GROUP_RES_SEC
Navigation	Click the  button on the Group Definition page.

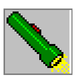


Group Definition - Group Result Page

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'll 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.



After entering information into the filter fields, click the **Search** button to populate the page with members who meet the search criteria. Navigator buttons enable you to move from one chunk to another.

Important! Keep in mind that Group Build automatically joins the JOB,COMPENSATION and EMPLOYMENT tables. So if you want to compare the Group results from this page with the results of a query launched from your SQL editor, do not forget to add the joins on those three records in your SQL editor to ensure the results are comparable.

Use the following filters and navigator buttons to move from one chunk of members to another:

Search on Name

Entering one or more letters in this filter field instructs the system to populate the page with employees whose last names begin with the letters you entered.

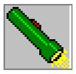
You can use the wildcard **%** to help select the record you want. For example, if you want to search for all employees named John, you can enter ***%John*** here.

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 you entered.

Sort Group by

Select whether you want the members to appear in the list in order by **EmplID** or **Name**.



Click the **Search** button to display the results of a new search. The field to the left of the Search button tells you which rows are visible compared to the total number of rows. For example, ***12 to 20 of 56*** means that rows 12 to 20 are displayed out of a total of 56 rows.

Click the **Clear** button to clear all previously entered search criteria from the filter fields.

Click the **First** button to display the first chunk of members.

Click the **Previous** button to display the previous chunk of members.

Click the **Next** button to display the next chunk of members.

Click the **Last** button to display the last chunk of members.

Setting Up Group Security

Because groups can cross departmental lines, groups have their own security structure that is separate from your existing departmental security. Group security overrides departmental security. For instance, a user who does not normally have access to Department 10100, but does have access to a group which includes Department 10100, is able to see all the group members, even the ones who belong to Department 10100. This makes security factors an important consideration when you set up groups.

You can control security access to groups in two ways:

- **By group.** You can decide which operators have access to a particular group. Do this on the Security by Group page.
- **By operator.** You can decide which groups a particular operator can see. Do this on the Security by Operator page.

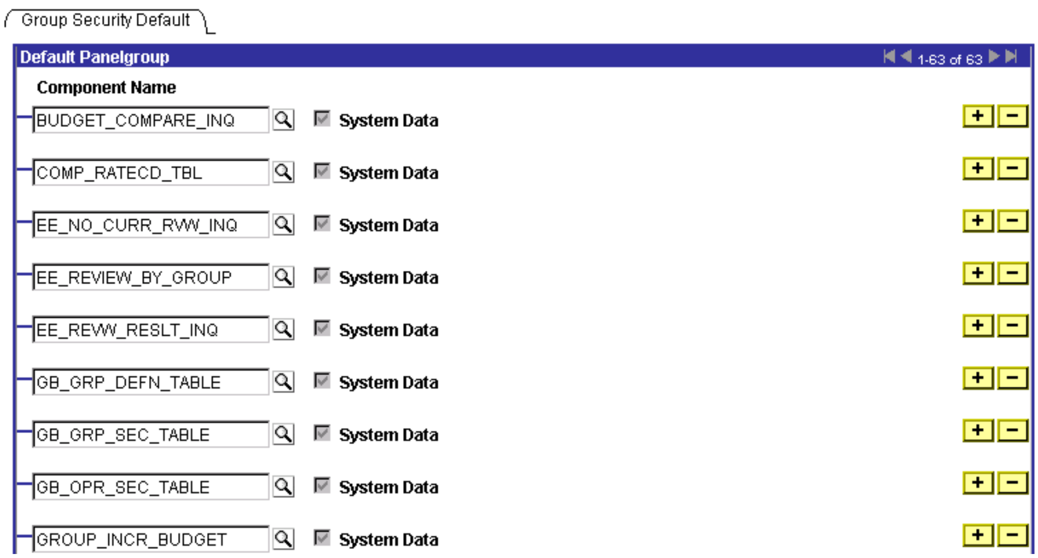
In both cases, you will also define the list of components where you want to have Group Security enforced.

Setting Up Default Component Access

You may not want all the pages in your system to be available to groups. The Group Security pages help you manage group access to pages in your system.

Group Security Default Page

Usage	Use the Group Security Default setup page to specify which components in your system can use or refer to groups created in the Group Build pages.
Object Name	GB_GROUP_DFT_TBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Group Security Default, Group Security Default** • **Define Business Rules, Manage Human Resources (USF), Setup, Group Security Default, Group Security Default**



Group Security Default page

Component Name

The system populates these fields with a list of all the standard PeopleSoft 8 Human Resources components that refer to groups. This can occur in two ways: either the page contains a field which prompts the user to supply a Group ID, or it displays a list of people who belong to a particular group.

When you define group security for a particular group or operator, you can import this default list into the Security by Group and Security by Operator pages. After that, you can selectively delete components to make them unavailable to that group or operator.

To keep a particular component from appearing on the Security by Group or Security by Operator pages at all, delete its name from the list here.

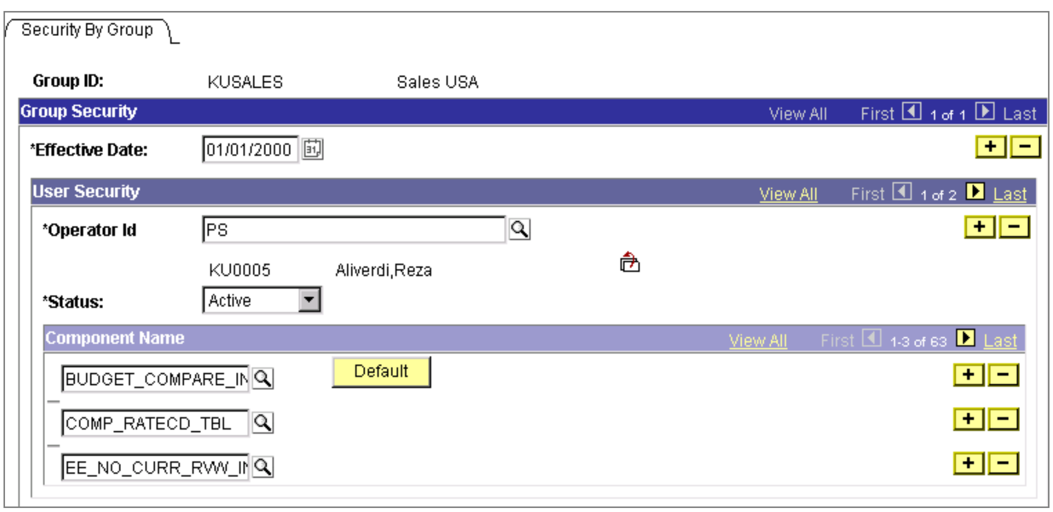
System Data	This check box specifies whether a component is a standard component delivered by PeopleSoft as system data, or a modified component created for your installation. The box is selected if the system supplies the data, and not selected if the component is a modified component. You can't change this field.

Setting Up Security by Group

Use the Security by Group page to control which users can gain access to a particular group and to components that are available within the group.

Security by Group Page

Usage	Use the Security by Group setup page to control security access to a particular group. You can also control access to individual components used by the group.
Object Name	GB_GRP_SEC_TBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Security by Group, Security By Group** • **Define Business Rules, Manage Human Resources (USF), Setup, Security by Group, Security By Group**
Prerequisites	You must create the group before you can grant security access to it.
Access Requirements	Group ID



Security By Group page

Group ID — The ID of the group for which you will control security. You can't change this field.

Effective Date — The date when the security configuration will take effect. The system defaults to today's date. Change the date if you want to grant security access as of a different date.

Operator ID — Enter the ID of an operator whose group access you want to change. The system displays a list of valid User IDs.

If you know an employee's Employee ID but not the matching User ID, click **Get Employee ID** button to search for the employee's User ID. The system displays the Search Operator ID box. Enter the **Employee ID** and click **OK** to instruct the system to add the employee's User ID to the operator list, if it isn't already on the list.

If you don't know the employee's ID, you can search for it by leaving **EMPLID** blank and clicking the drop-down arrow. The system displays a Valid Values page you can use to search for the Employee ID you want.

Status — Choose ***Active*** to grant the operator access to the group, and ***Inactive*** to remove the operator's access.

Component Name — Enter the name of a component that you want to include in the operator's security status. The status you assign to the operator will apply to this component. The system displays a list of valid values.

Default — Click this button to assign this operator access to the current Group ID from any component listed in the Group Security Default Page. The system will display the components you've selected.

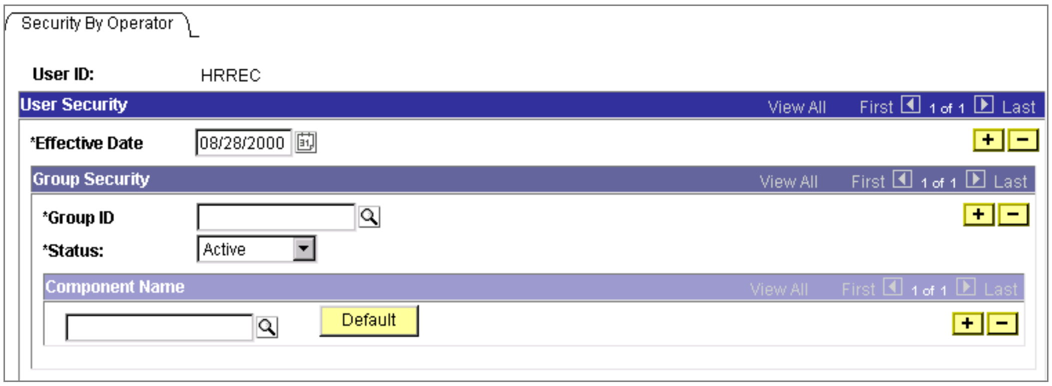
Setting Up Security by Operator

Use the Security by Operator page to control a particular user's security access to various groups. You can also control the operator's access to specific Groups from a particular component.

Security by Operator Page

Usage	Use the Security by Operator page to control a particular operator's security access to various groups and components.
Object Name	GB_OPR_SEC_TBL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Setup, Security by User, Security By Operator** • **Define Business Rules, Manage Human Resources (USF), Setup,**

	Security by User, Security By Operator
Prerequisites	You must have created the groups before you can grant security access to them.
Access Requirements	User (Operator) ID



Security By Operator page

User ID — The operator whose security access you will set in this page. You can't change this field.

Effective Date — The date when the security configuration will take effect. The system defaults to today's date. Change the date if you want to grant security access as of a different date.

Group ID — Enter the ID of a group to which you want to control this operator's access.

Status — Choose ***Active*** to grant the operator access to the group, or ***Inactive*** to remove the operator's access.

Component Name — Enter the name of a component to set the operator's security access in this component to the group you entered in the **Group ID** field.

Default — Click this button to assign the operator's security access for the group you entered in the **Group ID** field to all the components listed in the Group Security Default Page. The system will display the components you've selected.

Translating Existing Company and Department Structure into Group Format

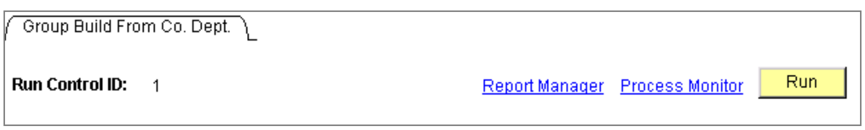
If your organization has an existing departmental security structure, creating a parallel structure for groups could involve redoing a great deal of existing work. To minimize duplication of effort, we've provided an automated process for translating your existing departmental structure into group format. Use the Group Build from Co and Dept (Company and Department) page to create new groups corresponding to your existing company, SetID and department structure. For example:

- Your existing 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 automatically gets 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.

Group Build From Co. Dept (Company and Department) Page

Usage	Use the Group Build from Company and Department process page to translate your existing company and department structure into group format.
Object Name	RUNCTL_GBP003
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Process, Group Build From Co And Dept, Group Build From Co. Dept.** • **Define Business Rules, Manage Human Resources (USF), Process, Group Build From Co And Dept, Group Build From Co. Dept.**
Access Requirements	User (Operator) ID and Run Control ID



Group Build From Co. Dept (Company and Department) page

Click **Run** to run this request. Process Scheduler runs the Group Build from Company and Department process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

When the process is complete, you can use the Group Build pages to check that the new groups were generated correctly.

Refining Groups in PeopleSoft Modules

Actual refinement of group members takes place at the module level. You can define a group as of:

- A particular point in time
- A period of time.

For more information about refining groups, please see Group Build: Technical Details for Developers.

Viewing Group Results

When you define a group through the Group Definition pages, you don't specify any time limits on group membership. This means that some groups may have very large lists of members. To help you manage these potentially unwieldy groups, we've provided several pages and reports you can use to view group members.

- Use the Complex Group Results Summary Page to view the status of complex groups that have been sent to the process scheduler.
- Run the Group Membership Report to view the members of a particular group.
- Run the Group Member Overlap Report to see which individuals belong to multiple groups.

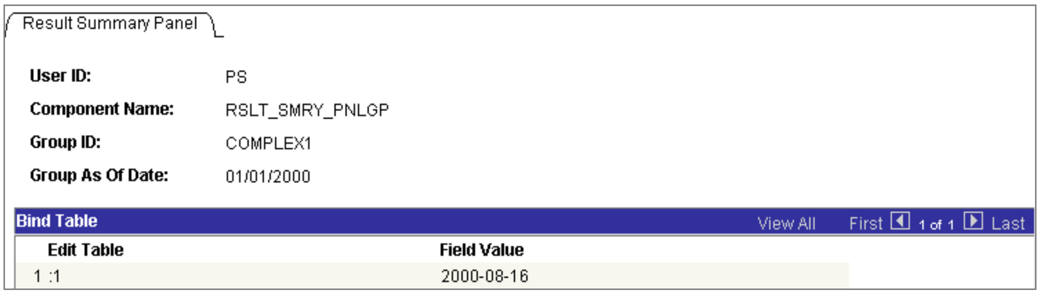
Viewing Complex Group Results

You can designate any group as a complex group by selecting the **Complex Group** check box on the Group Profile page. The system creates complex groups by batch process and notifies you when processing is complete.

Complex Group Results Summary Page

Usage	Use the Complex Group Results Summary page to view the members of complex groups you created in the Group Definition component.
Object Name	RSLT_SMRY_PNL
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Inquire, Complex Group Results Summary, Result Summary Panel** • **Define Business Rules, Manage Human Resources (USF), Inquire, Complex Group Results Summary, Result Summary Panel**

Prerequisites	Group ID. You must already have run the batch process to create the group.
Access Requirements	Group ID and Version Number



Complex Group Results Summary page

Group ID Enter the ID of the group whose members you want to view.

Group As Of Date Since Group definitions are effective-dated, you may have defined several versions of the same group for different dates. Enter the effective date to specify the Group Definition valid as of this date. The report will list the members who belong to the group as of the current date, or as of the date you specify in the **Refinement Date** field.

Purging 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. You can purge the old results for a group at any time by running the Group Results Purge process from the Group Results Purge process page. To purge all the old results from all your groups, use the Unusable Group Results Purge process page.

Group Versions

Each time you build a group, the system generates a version number and stores it in the result table. The system automatically 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 of the parameters you used to generate the group–for example, if you used effective-dated

job data.

Working with Versions for Developers

Please read Group Build: Technical Details for Developers before you read this section.

You have two ways to implement Group Build in an application:

- **Using the Default Developer Query.** The Default Developer Query works with the Default Result Table.
- **Creating your own Query.** If you use your own Query, you can define more parameters and/or more fields in a "personal" Results table.

However, you can use your own Results Table with the Default Developer Query, or use the Default Results Table with your own Query, as long as the fields selected by the Query match the Default Results Table structure.

This means that the system will re-generate the group and change the version number if either of the following changed since the last time you executed this group:

- The Query definition added by the Developer.
- The Result Table.

You can bypass the versioning mechanism by calling ***GB_EXEC("Y")***. In this case, the group will be generated each time it is called.

Purging Usable Results

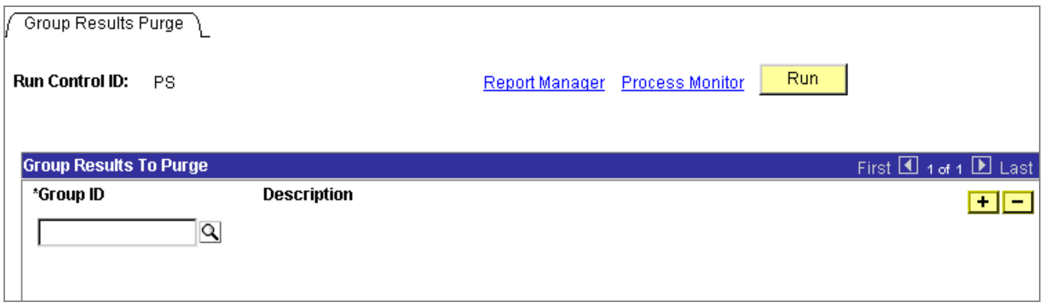
The Group Results Purge process deletes usable groups–in other words, groups with results in the Group Results table that are still in sync with the current Group Definition and could potentially be retrieved by the system.

For more information about the difference between usable and unusable groups, see Group Build: Technical Details for Developers.

Group Results Purge Page

Usage	Use the Group Results Purge process page to delete the results of a previous version of a group from the Group Results Table.

	The system deletes the results from the Group Build results table GB_RESULTS_TBL.
Object Name	RUNCTL_GBP004
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Process, Group Results Purge, Group Results Purge** • **Define Business Rules, Manage Human Resources (USF), Process, Group Results Purge, Group Results Purge**
Access Requirements	User ID and Run Control ID



Group Results Purge page

The system displays the **User ID** and **Run Control ID** you entered when you opened the page.

Group ID Enter the ID of a group whose results you want to purge.

Click **Run** to run this request. Process Scheduler runs the Group Results Purge process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Purging Unusable Results

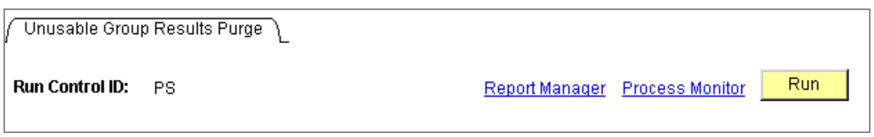
The Unusable Group Results Purge process deals with unusable groups. An unusable group is one that was generated when the group definition was different from what it is now, so the results stored on the Group Results Table no longer match the group definition. Group results become unusable when any of the following things change:

- The Developer's Query definition.
- The Results Table where the group results are stored.
- The group definition.

- The user's Query definition.

Unusable Group Results Purge Page

Usage	Use the Unusable Group Results Purge process page to delete the results from all your groups from the Group Result Table.
Object Name	RUNCTL_GBP005
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Process, Unusable Group Results Purge, Unusable Group Results Purge** • **Define Business Rules, Manage Human Resources (USF), Process, Unusable Group Results Purge, Unusable Group Results Purge**
Prerequisites	You must have saved the group you want to purge.
Access Requirements	Run Control ID



Unusable Group Results Purge page

The system displays the **Run Control ID** you entered when you opened the page.

Click **Run** to run this request. Process Scheduler runs the Unusable Group Results Purge process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Group Build: Technical Details for Developers

The purpose of this section is to provide a step by step method for developers, consultants or customers who would like to build their own applications or batch programs and include Group Build functionality.

This document discusses in detail the way to call the Groups execution from an online application and from an Application Engine using the various delivered Group Build APIs.

Any steps surrounded by square brackets [ ] are optional steps.

This guide is comprised of three sections. The two first sections detail what a developer has to do to use Group Build in the module he or she is building. (We will refer to this module as the client module.)

The third section presents the additional steps that must be performed for implementing workflow. This specific workflow is an enhancement of the generic workflow provided by default by the Group Build module. Workflow must be fully implemented by the client module developer. This section describes the main differences between the Group Build workflow and the standard way of implementing workflow.

Implementing PeopleCode API Calls

The following steps describe how to implement PeopleCode API calls. Please read through the entire section before performing any steps.

To Implement PeopleCode API Calls:

1. Set up a Group Build results table (Optional).

Group Build provides a standard result table called GB_GRP_RES_TBL. This table contains the results of the groups you built, and its content is entirely managed by the Group Build module. This table is a central place for storing Group Build results. As a consequence, results in GB_GRP_RES_TBL can be shared by all the applications using Group Build. Therefore, do not add, delete or modify rows.

If you want your own table for your module 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 Group Build module.

There are two ways you can go:

a. Log on to the Application Designer and clone the record GB_GRP_RES_TBL into MyClientModuleResultTable. This record becomes your client module result table.

b. Create a new record (MyClientModuleResultTable) into which you will at least insert the subrecord GB_GRP_RES_SBR (the minimal structure for a modified result table). Note that the modified results table can contain more fields than the one defined in the subrecord. However, in this case you won't be able to use the standard query «GB_DEFAULT_QUERY». You would have to create your modified Developer Query in which the additional fields must appear in the «field tab».

For instance, if your result table is defined as DEPTID.

Your modified Query must be defined as follows:

- all the fields from GB_QRY_LINK_VW
- all your additional fields

2. Add two fields on the client module record to store the Group ID and group as of date.

(Optional).

In the Application Designer, add two fields on the client module record (MyClientModuleRecord)

c. Add the field GB_GROUP_ID for storing the Group ID. This field should prompt on GB_GROUP_TBL.

d. Add an AsOfDate field MyAsOfDate for storing an AsOfDate of the group.

This step is optional. The developer can choose not to record such information but to use a derived/work record (as in step 3) or system variables (such as system date).

3. Create a derived/work record to store your group generation button.

In the Application Designer, create a derived/work record to store your group generation button.

e. Create a new record DERIVED_MyClientModule (you can use an existing derived record instead).

f. Create a new field MyClientModule_GEN_BTN.

g. Add new field MyClientModule_GEN_BTN to DERIVED_MyClientModule record.

4. Include the work panel GB_API_WRK in the client module component.

h. Go to the Application Designer.

i. Open the component (MyClientModuleComponent) containing the page (MyClientModulePage) from which the call Group Build API.

j. Insert into MyClientModuleComponent the page named GB_API_WRK (the Group Build work page) and mark it hidden.

5. Using Query, define the query you might want to add to for refining your group - Developer Query definition (Optional step).

k. Insert the view GB_QRY_LINK_VW (mandatory).

l. Insert the needed record(s) for joins and criteria.

m. Write your query according to the Group Build limitations (no union, no aggregate, no tree option).

n. Add all needed prompts on the criteria tab. (Prompt values will be binded using GB_BIND API call.)

o. Verify that your query is PUBLIC.

p. Save your query as MyDeveloperQueryName.

Group Build Query Limitations for developers

There are some limitations to the standard use of PeopleTools Query that a developer should be aware of:

- 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 exclickion.
- You must include the view GB_QRY_LINK_VW in the query.
- Records that you add in QUERY must have at least one criteria.
- Prompt can be used as exclickions to bind variables.

6. Add modified fields on the client module page.

  q. Add MyClientModuleRecord.GB_GROUP_ID field on MyClientModulePage.

  r. Add MyClientModuleRecord. MyAsOfDate field on MyClientModulePage.

  s. Add DERIVED_MyClientModule.MyClientModule_GEN_BTN (Group Generation Button) on MyClientModulePage.

7. Add PeopleCode to implement calls to Group Build API.

Refer to the following API Functions List.

Important! All calls to Group Build API must be done from LEVEL 0 of your client module page.

You should make calls to GB API in FieldChange PeopleCode event, and the PeopleCode Event Properties *must be* set to **Application Server.** Select **Application Server** on the PeopleCode Event Properties panel.

List of PeopleCode API functions

  t. Specifying which group, query name, results table to use

```
&ret_bool = GB_DECLARE(group_id, AsOfDate of the group, query_name,
result_table_name)
```

Note .Specifies the API which group, which query name for refinement, which results table to use.

- 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. 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. Default result table used is PS_GB_GRP_RES_TBL. Result_table_name has to be fully named (specify the PS_ in the parameter name as in « PS_MY_RESULT_TABLE »).

u. Binding values

```
&ret_bool = GB_BIND(prompt_code, value)
```

Enables you to bind values if prompt 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. In that case, you would use the delivered API: GB_BIND_DATE.

- The parameter prompt_code must be defined as a prompt in the developer query. It is required.
- The parameter value is required.

v. Binding a date as refinement when you're using the standard Query.

```
&ret_bool = GB_BIND_DATE(value)
```

This function is used when you're using the standard Query GB_DEFAULT_QUERY. It enables you to bind a date (value) as refinement.

- The parameter value is optional and specifies a refinement date. If not specified, it is defaulted to %date.

w. 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,*** this parameter forces the SQL statement regeneration each time you call the function. If the flag is set to ***N*** the function looks if a generated group exists and returns its version number. If the group doesn't exist, it generates it. Refresh_flag is a required parameter.

x. Deleting the content of the result table.

```
GB_DELETE()
```

y. Disabling/enabling the generic workflow and enabling/disabling the specific workflow.

```
GB_SET_JOB_WF(job_name)
```

Disables/enables the generic workflow and enables/disables the specific workflow according to job_name value. Specifies the job (job_name) to be scheduled in place of the default one (used for generic workflow) if specified.

- The parameter job_name is optional.
- If the job_name is specified then the job named job_name must be defined in the Process Scheduler as described in the specific workflow section of the document.
- Providing a non null job_name enables the corresponding specific workflow. Generic workflow is then disabled.
- Providing a null job_name as parameter enables the generic workflow (workflow by default).

Note. Group Build API functions list described here is a funclib (DERIVED_HR_GB.GB_API FieldFormula) for PeopleCode.

- On FieldChange PeopleCode event of DERIVED_MyClientModule.MyClientModule_GEN_BTN add:
- Implement Group Build Calls using the standard Result Table and Query

When implemented in the modified module, your People Code should actually look like:

```
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() ;]
```

Implement Group Build calls using your own modified Result Table and Query

```
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() ;]
```

8. Implement Security to check if a Group can be used in the component.

- 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.
- Add DERIVED_XXX.PNLGRPNAME and DERIVED_XXX.OPRID on Level 0 of the page. Those fields must be display only and hidden.

Implementing AE API Calls

To Implement PeopleCode API Calls:

1. Create your Run Control panel in Application Designer.

2. Create a new Run Control Record, or use an existing one.

In this Run Control Record, you must add:

z. Your Parameters (GB_GROUP_ID, GB_EFFDT, GB_REFINE_DATE)

aa. The field VERSIONGBQDM

3. Create a new program using the Application Engine Program.

This program must contain:

bb. 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)
```

cc. 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
*/
```

dd. 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.
```

ee. 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)
```

Perform your own AE processing using this group

4. Create reports based on the group you have just created by setting up a JOB.

   When the system launches the SQR, you will get the GB_GROUP_ID VERSIONGBQDM (Version of the group) from the Run Control record. This will enable you to retrieve the group from the Results table and print it or make some processing on it.

- What are the differences between a PeopleCode API and an Application Engine API?

There are not too many differences between the two ways of building a group.

- In both cases, you use the PCode functions GB_DECLARE, GB_BIND or GB_BIND_DATE.
- In the PCode 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 AE 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 PCode API directly in an AppEngine PCode Step?

There is a tools limitation:

The CallAppEngine( ) function is not intended to be inserted within 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.

As the PCode API makes several CallAppEngine calls, we can’t proceed this way, and must use a call section action.

Developing Client Specific Workflow

Though the business process diagram looks like the Group Build generic workflow business process, you have to fully develop a specific business process for each specific client module if you want to enhance the information provided by the group build generic workflow for the following reasons:

- The worklist routing to enhance user information should branch directly the operator to the calling client module panel.
- The business event is triggered from the client module panel.

Due to the first consideration, the worklist record table has to contain key fields for accessing the client module panel. This means that you should map these worklist fields to the appropriate client module panel fields (the workflow is triggered from the calling panel).

The Message Agent is responsible for entering data on the client module panel for triggering the specific workflow. The Database Agent executes a query that retrieves values passed as Message Agent input fields. This means that the database agent query should retrieve the needed key values plus the condition for triggering the workflow.

You'll have to define a new client specific table record (MySpecificWorkflowTable). This record stores all client module key fields, the Group ID (GB_GROUP_ID) field and the version (VERSIONGBQDM) field. You should fill the MySpecificWorkflowTable you call Group Build (in order to know the version number).

In summary, as a client module developer, you'll have to :

1. Define a new table (MySpecificWorkflowTable) for storing the panel key fields, Group ID and version number fields.

2. Define a new worklist table record.

3. Define a derived/work field responsible for triggering the specific workflow.

4. Add this field as a hidden field to the client module panel.

5. Provide PeopleCode for storing panel key values before calling group build.

6. Define a database agent query for retrieving key fields values, Group ID, version number, oprid.

7. Design the specific business process (activities, steps, business event, worklist routing, email routing, database agent, message agent) meaning defining all needed attributes and field mappings.

8. Define a new process for the modified database agent (MyDBAGProcess) in the process scheduler.

9. Define a new job (MySpecificJobName) serializing the Application Engine calling the section GB_EXEC in the application engine GB_API and the modified database agent process (MyDBAGProcess).

10. Pass the new job name to Group Build as a parameter via 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 one. The call to this function has to be done before the call to GB_EXEC.

11. Add PeopleCode to save needed information in MySpecificWorkflowTable.

    The work is presented step by step in the following steps.

5. Design MySpecificWorkflowTable.

Design MySpecificWorkflowTable so that all key fields necessary for accessing your client module panel be recorded.

- Add two key fields GB_GROUP_ID and VERSIONGBQDM to your record.

- Add a workflow flag WF_FLAG.

In the example below MySpecificWorkflowTable is SWF_SWF_TBL

6. Design MySpecificWorkflowDerived/Work.

Design MySpecificWorkflowDerived/Work, adding 2 fields GB_TRIGGER_WF, which are responsible for triggering the workflow and OPRID important for routings.

In the example below MySpecificWorkflowDerived/Work is DERIVED_SWF

7. Add the newly created fields to the client module panel.

Make them invisible.

8. Define a worklist record MyWorklistRecord for routing to the calling client module panel.

BUSPROCNAME, ACTIVITYNAME, EVENTNAME, WORKLISTNAME, INSTANCEID, TRANSACTIONID are standard and mandatory fields for any worklist record.

Add all your panel key fields plus GB_GROUP_ID and VERSIONGBQDM fields.

9. Define the database agent query.

DBAG query is responsible for retrieving calling client module key fields values, Group ID, group version number, operator id.

ff. Go to Tree Manager.

Add MySpecificWorkflowTable into HR ACCESS GROUP as follows :

gg. Go to the Query Tool.

- Define your query joining MySpecificWorkflowTable and GB_GENERICWF on Group ID and version number to return specific key values, Group ID, group version number, workflow triggering flag and operator id.
- Include in your criteria two prompts on Group ID and version number.
- Save your query as a public database agent query named "_DBAG__MySpecificWorkflowQuery".

10. Design the MySpecificBusinessProcess.

hh. In Application Designer, define a business process. MySpecificBusinessProcess has two activities, MySpecificWorkflowModule and MySpecificWorkflowModuleResult. Each activity has only one step branching to the client module panel:

ii. In MySpecificWorkflowModule activity add a business event, a worklist routing, an email routing, a database agent and links according to the following diagram :

jj. Define each item and its required attributes. The business event is triggered from MySpecificWorkflowDerived/Work record (DERIVED_SWF in the example).

kk. Add workflow PeopleCode using push button "Edit Business Rules…" and write code as displayed providing the condition for calling TriggerBusinessEvent function. Write correct parameters: business process, activity and business event to trigger.

ll. On the Worklist Attributes panel, choose the record defined in step 4 as being the worklist record. Specify the Business Process, its activity that works the worklist (MySpecificWorkflowModuleResult).

mm. On the Field Map panel, specify the mapping between the worklist record fields and your client module panel keys.

nn. For the field OPRID choose the rolename "Roleuser by Oprid Qry" binding the OPRID query variable to the field MySpecificWorkflowDerived/Work.OPRID (DERIVED_SWF.OPRID in the example).

oo. For the email routing define the field map between your email fields (SUBJECT, NOTETEXT, TO, CC, BCC) and your module fields.

pp. Define the database agent items as described hereafter:

- Define the target component in the Message Attributes panel; give the path to your client module component.
- Enter in the Query Name field the database agent query defined at Step 5.
- Then define the mapping between the query selection fields (second column) and your client module panel fields (last column).

11. Go to the Process Scheduler and define MySpecificWorkflowDBAGProcess

qq. Add a new process of type Database Agent in the Process Definitions panel.

rr. Provide all needed information as described below:

ss. On Process Definition Options panel override parameters list in Append mode specifying 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 panel.

12. Go to the Process Scheduler and define MySpecificWorkflowJob.

Add a new job serializing the Group Build App Engine process (the one calling GB_API.GB_EXEC) and MySpecificWorkflowDBAG database agent process.

13. Add calls to Group Build API on your client module.

On FieldChange PeopleCode event of your Group Build calling push button, use group build API as described at Step 7 in the first section of this Guide. Don't forget to make a call to

GB_SET_JOB_WF function in order to activate your specific workflow (and to disable the generic one).

14. Add PeopleCode to store needed information in MySpecificWorkflowTable.

CHAPTER 14

Generating Form Letters

Many of your organization's human resources activities involve sending out routine letters and memos on a regular basis. For example, in managing recruitment tasks you might write letters acknowledging receipt of resumes, job postings, job offers, and rejections after interviews. If you administer training courses, your letters might include announcements for course session enrollments, cancellations, and rescheduling.

Each type of letter doesn't change much from mailing to mailing; what changes is information like names, addresses, and dates. All this data is already in your human resources database, but up to now, you've had to re-enter the information in letters in your word processor, a laborious job.

With PeopleSoft Human Resources, you can create form letters in your word processor by directly accessing the data you need from your database. You'll no longer have to spend a lot of time creating the same letters over and over. In addition, your letters will be accurate–you don't have to retype the information, so there's no risk of making new errors like name misspellings or incorrect dates.

Using Microsoft Word for Windows as the word processor, we deliver sample form letters for these areas of human resources: recruitment, training administration, and manage labor relations. 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. You can find a set of sample form letters at the end of this section.

We assume you're familiar with Word for Windows macros and mail merge. If you are unfamiliar with these processes, consult your ***Microsoft Word for Windows User's Guide.***

Before You Begin

You generate the sample form letters included with PeopleSoft Human Resources from the Process Scheduler. You run an SQR to extract data from PeopleSoft Human Resources and merge it into a Word for Windows document template.

The sample form letters we deliver with PeopleSoft Human Resources use SQRibe Technology's Structured Query Report Writer to extract data from the PeopleSoft Human Resources database, and Microsoft Word for Windows as the word processor.

If you use a different report writer or word processor in your organization, use the information in this section to understand the steps involved in generating form letters. Then consult your report writer or word processor documentation to help you modify the procedures to fit them or use the Process Scheduler in PeopleSoft Human Resources to generate the letters.

Once you're familiar with the sample letters included with the system, you may modify the form letters (or create new letters) for other human resources tasks. We discuss ways you can modify the form letter process in Adapting Form Letters, at the end of this section.

Overview of the Form Letter Process

Before you generate any form letters, or make any modifications to the sample form letters delivered with PeopleSoft Human Resources, you should have a good understanding of how the process works and the elements involved.

To generate form letters:

1. To prepare for generating form letters, you tag records in your PeopleSoft Human Resources database that you want to extract data from, by inserting a Letter Code in the records of applicants, employees, or non-employees.

For example, if you want to print letters inviting applicants for interview, you enter a Letter Code on the Interviews page that you access from Requisition Activity - Interviews page. The system automatically inserts letter codes into employee and non-employee records when you enroll or waitlist students. You create letter codes in the Standard Letter Table.

For more information about tagging records, see the Recruiting Your Workforce, Administering Training, or Managing Labor Relations.

---

2. Use the report writer to run SQRs. The SQRs search your PeopleSoft Human Resources database, retrieve data from tagged records, and create data extract files containing one line of data for each letter. The system also updates the Print Date field in applicant or student records so that the next time you run the SQRs, it won't extract data for letters you've already printed.

3. Use Word for Windows to run macros that merge the data extract files into form letter templates, one for each type of letter. The macros themselves are stored in a Word for Windows document called EMPTY.DOC.

To generate form letters using the Process Scheduler, we deliver these Word macros:

- PRCSAPP004 for generating job postings
- PRCSAPP007 for generating recruitment letters
- PRCSTRN001 for administer training letters
- PRCSPER061 for manage labor relations letters.

Your PeopleSoft Human Resources system is delivered with two files containing the macros

STDLTR.DOT and STDLTR.95. You'll find these in the \\PS\WINWORD directory on your application CD. The macros in STDLTR.DOT are for use with Word 97, which is used in Microsoft Office 97, and are written in Visual Basic. The macros in STDLTR.95 are for use with Word 7.0, which is used in Microsoft Windows 95, and are written in Word Basic. You must ensure that you use the file that is appropriate for your system. If you need to use STDLTR.95, copy it to your system and rename it to STDLTR.DOT.

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 address is in their employee record.

5. Print the letters using Word for Windows. The system creates the form letters in a temporary directory on the application server, putting all the letters of the same type in one file.

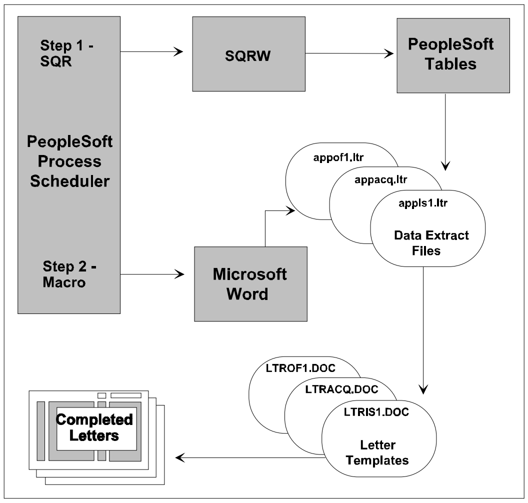
The distributed architecture of your PeopleSoft Human Resources system means that your application server could be located far from your machine so the system doesn't print letters automatically to a default printer. Instead, you select where you want to print the letters using the standard Word for Windows print options .

For more information about changing the location of letter files, see Setting up the Macros for your Environment.

Generating Form Letters with the Process Scheduler

The Process Scheduler performs steps 2 and 3 described in the previous section (it also performs step 4, sending emails, for training 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 these steps sequentially–an SQR first, then its corresponding macro–because the Process Scheduler can't call up the report writer and the word processor simultaneously. Also, the data extract file the SQR creates must exist before the Word macro starts.

The following diagram illustrates generating form letters using the Process Scheduler, we'll use the SQR APP007 and the macro PRCSAPP007.



Generating Form Letters Using the Process Scheduler

APP007 scans the recruitment records (Applicant Data, Applicant Activity - Positions, Applicant Activity - Interviews, and Applicant Activity - Offers) that contain Letter Codes and have no Print Date. It retrieves the information from the records, creates data extract files in the TEMP directory defined in the macro, and updates the Print Date field in applicant records.

The data extract files have a name with three-letter module references, a Letter Code, and an extension reflecting the type of document it is. For example, the file containing data for offer letters is APPOF1.LTR, where APP represents recruitment applicants, OF1 represents offer letter, and .LTR represents letter.

When you run the Word for Windows macro PRCSAPP007, it opens form letter templates corresponding with each data extract file. The macro merges the appropriate extract file data into the field codes of each template. In the case of offer letters, the template is called LTROF1.DOC, and includes field codes for names, addresses, and offer amounts. The macro inserts the data from APPOF1.LTR into the template field codes.

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, from the Letter Codes used in PeopleSoft Human Resources pages to the form letter templates used in Word for Windows. You should use this same naming convention for any new form letter components you create.

Letter Codes. You create Letter Codes in the Standard Letter Table. The standard letter codes delivered by PeopleSoft for use with the sample letters are listed here.

Data Extract Files. The first three letters identify the PeopleSoft Human Resources module:

- APP represents Recruitment
- TRN represents Administering Training
- MLR represents Manage Labor Relations

The second three letters correspond with the Letter Code used and the extension .LTR represents form letters. Every Letter Code that you generate form letters for must have a corresponding data extract file with this naming convention.

Word Letter Templates. All the sample Word letter templates begin with the letters LTR. The LTR prefix identifies the document to the macro automating the form letter generation. The next three characters indicate the type of letter you are generating. These characters must match the Letter Code in PeopleSoft Human Resources. Word for Windows automatically assigns the extension .DOC to all documents.

Here's a list of the Letter Codes and the associated data extract files and word templates:

Purpose of Letter	***Letter Code***	***Data Extract File***	***Word Letter Template***
Recruitment Letters			
Acknowledgement	LAQ	APPLAQ.LTR	APPLAQ.DOC
Acknowledgment of resume receipt	ACQ	APPACQ.LTR	LTRACQ.DOC
No current opening letter	ANO	APPANO.LTR	LTRANO.DOC
First interview letter	IS1	APPIS1.LTR	LTRIS1.DOC
Second interview letter	IS2	APPIS2.LTR	LTRIS2.DOC
Third interview letter	IS3	APPIS3.LTR	LTRIS3.DOC
Rejection after an interview	IR	APPIR.LTR	LTRIR.DOC
Job offer 1 letter	OF1	APPOF1.LTR	LTROF1.DOC
Job offer 2 letter	OF2	APPOF2.LTR	LTROF2.DOC
Training Letters			
Confirmation of session enrollment	CON	TRNCON.LTR	LTRCON.DOC
Rescheduling of course session	RSC	TRNRSC.LTR	LTRRSC.DOC
Cancellation of course session	CAN	TRNCAN.LTR	LTRCAN.DOC
Labor Relations Letters			
Confirmation of Disciplinary Action Filed	DAF	MLRDAF.LTR	LTRDAF.DOC
Confirmation of Disciplinary Action Resolution	DAR	MLRDAR.LTR	LTRDAR.DOC
Confirmation of Grievance Filed	GRF	MLRGRF.LTR	LTRGRF.DOC
Confirmation of Grievance Resolution	GRR	MLRGRR.LTR	LTRGRR.DOC

The Standard Letter Table also contains two codes, WTC and WTS, used in Administer Training for students on waiting lists. However, these codes don't have macros or sample letters associated with them. To create letters and macros for these letter codes, refer to Adapting Form Letters.

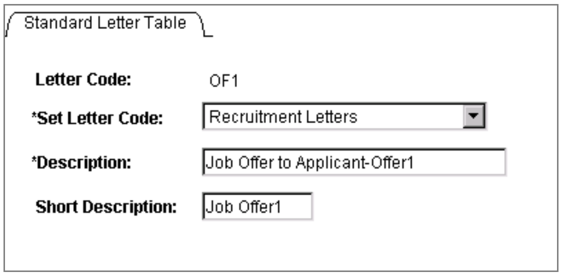
Setting up Standard Letter Codes

Each standard letter is represented by a code that you enter in pages when you want to generate a form letter. The Letter Code field is used in Recruit Workforce, Administer Training, and Manage Labor Relations.

This section explains how to set up codes for your standard letters and print out a report of the codes you have set up in the Standard Letter table.

Standard Letter Table Page

Usage	Use the Standard Letter Table page to define your letter codes. PeopleSoft deliver letter codes for the sample letters supplied as standard. You may need to add your own codes if you want to generate other form letters.
Object Name	STANDARD_LTR_TABLE
Navigation	• **Develop Workforce, Administer Training (GBL), Setup, Standard Letter Table, Standard Letter Table** • **Develop Workforce, Administer Training (USF), Setup, Standard Letter Table, Standard Letter Table** • **Develop Workforce, Recruit Workforce (GBL), Setup, Standard Letter Table, Standard Letter Table** • **Develop Workforce, Recruit Workforce (USF), Setup, Standard Letter Table, Standard Letter Table**
Prerequisites	None
Access Requirements	Enter a Letter Code.


Standard Letter Table

Letter Code: OF1

*Set Letter Code: Recruitment Letters

*Description: Job Offer to Applicant-Offer1

Short Description: Job Offer1

Standard Letter Table page

Set Letter Code

Select a **Set Letter Code** from the available options. The **Set Letter Code** is used to group together similar letter codes, making it easier to find the letter code you want to use. These are the valid options:

Customer Letters: Use this option if you have created letters specifically for your organization that don't fit into any of the other categories.

Employee Review Letters: Use this option for your employee review letters.

Manage Labor Relations: Use this option for your labor relations letters. The standard disciplinary and grievance letters are covered in Administering Your Workforce.

Recruitment Letters: Use this option for your recruitment letters and job postings.

Training Letters: Use this option for your training letters.

The system uses the **Set Letter Code** to determine which letter codes to list at the Letter Code fields. For example, if you are at a recruitment page, the list of valid values only includes letter codes with a **Set Letter Code** of ***Recruitment Letters***.

Description

Enter a **Description** of the purpose of the letter.

Short Description

Enter an abbreviated description of the letter in the **Short Description** field.

Printing a Report of Standard Letter Codes

Once you have set up your Standard Letter Table, you can generate a report of the letter codes. You can run the Standard Letter Table report from Recruit Workforce or Administer Training.

For more information about generating the report, see Generating the Standard Letter Table Report.

Setting up the Macros for your Environment

The standard Word for Windows macros supplied by PeopleSoft create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to create the letters locally on your own machine so that when you print the letters from Word for Windows, you can print them to your local printers.

To change the location of form letters:

1. Set up a shared directory on your machine for the reports. 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 Recruit Workforce and Manage Labor Relations letters you must also set up subdirectories for each language you run the letters in. For example, if you run letters with the Language field set to English, you must create a directory C:\TEMP\ENG. See your system administrator if you don't know how to set up shared directories.

2. Update the macros you need to use with the location of your shared directory. For example, if you are the Training Administrator you edit the macro PRCSTRN001.

   You would replace the following line in the macro PRCSTRN001

   ```
   WordBasic.Call "FuncLib.MergeWild", "C:\TEMP", "TRN*.LTR", "C:\HR800\WINWORD",
   "LTR*.DOC", "C:\TEMP"
   ```

   With:

   ```
   WordBasic.Call "FuncLib.MergeWild", "C:\TEMP", "TRN*.LTR", "C:\HR800\WINWORD",
   "LTR*.DOC", "\\<machine_name>\TRNTEMP"
   ```

   Where <machine_name> is the machine name assigned to your computer.

Adapting Form Letters

Form letters are useful for many other administrative tasks besides those for which we deliver sample letters. Depending on your needs, you can modify the sample form letters in several ways, ranging from simple changes to text in the existing templates, to adding the Letter Code field to other pages in PeopleSoft Human Resources. At the very least, you'll want to ensure that the macros contain the right PATH configuration for your system, and change the text in the sample letters to match your organization's requirements.

In this section we'll outline exactly how you can adapt form letters as follows:

- Modify the Word for Windows macros for the sample letters, such as changing the PATH statements to match your environment.
- Change the text in sample form letters so that it suits your organizational needs, such as changing the author name and title.

- Extract values from other fields in PeopleSoft Human Resources and insert them into existing form letter templates, such as adding a currency code field to the job offer letter.
- Create new form letters for different purposes, such as creating a letter notifying applicants of their interview schedule.
- Add the Letter Code field to other pages in PeopleSoft Human Resources and create form letters for them. For example, you might want to add the Letter Code field to Employee Review in Plan Salaries and create a form letter to advise employees of upcoming reviews.

Modifying the Word Macros for the Sample Letters

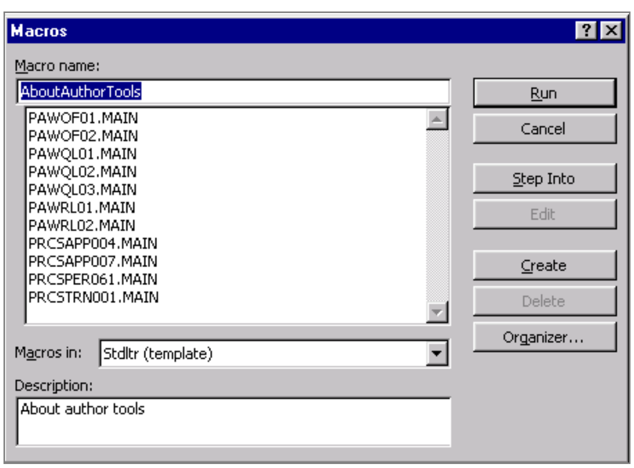
You should specify several environment variables in each Word for Windows macro so that it can find the Word templates and data extract files during the form letter process. For example, your network or workstation configuration may have some of the files in different locations than those specified in the macros, so you'll need to modify the PATH in the macros to reflect the correct locations.

Before you edit the existing macros (or create new ones), we recommend that you print copies of the Word for Windows documents, macros, and the report writer SQRs, and study them carefully.

To make this change, you should be familiar with Microsoft Word for Windows templates and macros, and your report writer.

You'll find all the macros attached to a file in the \PS\WINWORD directory. (Your path may differ depending upon your installation but you should always be able to find the file under a winword subdirectory.) They are attached to an empty Word for Windows file called EMPTY.DOC.

To modify existing macros, open Microsoft Word, and open the file EMPTY.DOC. Then select Tools, Macro and select Stdltr (template) in the Macros in field.



Template Macros

Highlight the macro you want to modify and click **Edit.**

Macros names that begin PAW are used in PeopleSoft Pension Administration.

For more information about Word macros, see your ***Microsoft Word for Windows User's Guide.*** For more information about SQRs, see Structured Query Reports (SQRs).

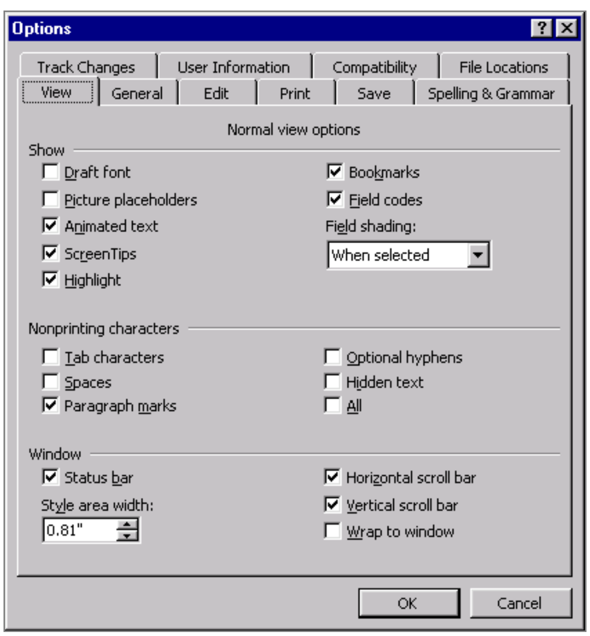
Modifying the Text in Sample Letter Templates

The form letter templates delivered with PeopleSoft Human Resources contain sample text for different types of tasks, which you can change to suit your own needs. For example, you'll probably want to change the sender name in the letters to the employees in your organization who are responsible for administering the tasks. If all you need to do is adapt the text to your organization without changing any fields used, or pages and tables referenced, in PeopleSoft Human Resources, follow these instructions.

Locate the Word letter template you want to update. These are listed in Naming Conventions for Form Letter Files. All the templates are in the directory \PS\WINWORD.

To modify the existing form letter templates, open Microsoft Word for Windows, and then open the document you want to modify.

If you see "" in the document, select Tools, Options, and select the **Field Codes** check box.



Selecting the Field Codes Check Box

Don't overwrite the field codes–they are the placeholders for values extracted from PeopleSoft Human Resources. Field codes are within curly brackets.

{MERGEFIELD System Date}

{ MERGEFIELD **Line1}**
{ MERGEFIELD **Line2}**
{ MERGEFIELD **Line3}**
{ MERGEFIELD **Line4}**

{ MERGEFIELD **Line5}**
{ MERGEFIELD **Line6}**

Dear {MERGEFIELD Salutation}:

I am pleased to offer you a position at PeopleSoft at a starting salary of {MERGEFIELD Offer_Amt}. Salary payments are made on the last working day of each month. You are provided with 15 paid leave days during each calendar year with the Paid Time Off program.

Following a one-month waiting period, you will be eligible for our company-paid benefits package, which includes the medical/dental, vision, life insurance, and disability benefits described in the attached brochure.

You will be eligible to participate in the 401(k) plan beginning the first
quarter after your hire date. You are also eligible for the PeopleSoft Stock Option plan. Grants are made at the discretion of management based on performance and significant contribution to achieving corporate goals.

I believe that PeopleSoft has tremendous potential as a company that
provides great opportunities for personal growth, challenging work, and financial rewards. We look forward to your joining the PeopleSoft team.

Sincerely,

Jay Ferreira
Recruitment Specialist

Make changes to the text as you would to any other document. In our example, we've changed the author from Barbara Smith, Employment Coordinator to Jay Ferreira, Recruitment Specialist. When you've finished, select File, Save.

For more information about Word letter templates, see your ***Microsoft Word for Windows User's Guide.***

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. For example, if you routinely make job offers using multiple currencies, you might want to include a currency field code in the Recruitment job offer letter.

To make this change, you should be familiar with Microsoft Word for Windows 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 you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all the fields you want to use and writes them to the appropriate data extract files.

Example

For example, to include currencies in the job offer letter LTROF1.DOC, you'll add a Currency field code to the form letter template. You'll also add a variable for currency in APP007.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:

```
systemdate, Line1, . . ., Offer_Amt

"May 15, 1993", "Mr. John Matson" . . . , "40,000"
```

Here's what it looks like after the change:

```
systemdate, Line1, . . ., Offer_Amt, Currency

"May 15, 1993", "Mr. John Matson" . . . , "40,000", "US Dollars"
```

For more information about Word letter templates, see your ***Microsoft Word for Windows User's Guide***. For more information about SQRs, see Structured Query Reports (SQRs).

Creating New Form Letters

How about creating new form letters for different purposes? For example, you might want to send out form letters listing interview schedules for applicants. Or for administering training, you might want to create a form letter notifying students they are on the waiting list for a course session. The possibilities are endless. As you work with form letters, undoubtedly more ideas for using them for other purposes will occur to you.

To make this change, you should be familiar with Microsoft Word for Windows field codes and the SQR's used to extract data values from your PeopleSoft Human Resources database.

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. Letter templates are described in your ***Microsoft Word for Windows User's Guide.***

   You might find it easier to adapt an existing form letter template than to create a new one from scratch. Look through the existing form letter templates to see if there's one that might need only minor modifications to serve as a new form letter template.

   For example, let's create a new form letter for interview schedules, INT. To create a new form letter template for interview schedules, let's adapt the offer letter template. In the directory \PS\WINWORD, open LTROF1.DOC. Save the new template with a different name by selecting File, Save As, LTRINT.DOC, OK.

   Make the appropriate changes to the text and add any new field codes you want to use in the letter.
3. Edit the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.

   For example, if you want to create a new form letter for interview schedules, you'll create new procedures in APP007.SQR to extract values from all the fields and create a separate data extract file to store interview schedule letter information.

For more information about SQRs, see Structured Query Reports (SQRs).

If you want to link your new letter to the Process Scheduler, ask your human resources project leader or refer to Introduction to PeopleSoft Reporting and Process Scheduler.

Adding Letter Code Fields to Pages

To get you started generating form letters, we deliver PeopleSoft Human Resources with Letter Code fields in several pages in Recruit Workforce, Administer Training, 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 could add the Letter Code field to one of the pages from the Plan Careers menu. If you send out letters to employees advising them of performance or salary reviews, you could add a Letter Code field to the Employee Review page.

To make this change, you should be familiar with the PeopleTools Application Designer; Microsoft Word for Windows field codes, macros, and data statements; and the SQR's 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, you'll also need to create a new:

- Letter code that represents the particular module.
- Form letter template with the appropriate text, field codes, and data statements.
- SQR that extracts data from the correct tables in PeopleSoft Human Resources and creates new data extract files.
- Word for Windows macro.

For more information about creating new SQRs, see Structured Query Reports (SQRs). For more information about Word macros, see your ***Microsoft Word for Windows User's Guide*.**

To link the new SQR and Word macro to the Process Scheduler, ask your human resources project leader or refer to Introduction to PeopleSoft Reporting and Process Scheduler.

Sample Form Letters

In this section there are two sample letters, a confirmation of enrollment letter used in Administer Training and an acknowledgment of resume letter used in Recruit Workforce.

Training Letter Sample

August 10, 2000

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 09/11/2000 and ending 09/15/2000. 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

Recruitment Letter Sample

November 1, 1998

Ms. Judith Cologne
698 Donegall Drive
Apt. 301
Toronto, ON M5P 3K8

Dear Ms. Cologne:

Thank you for sending your resume to PeopleSoft. We are now reviewing your qualifications and background against current openings. We will contact you for an interview if we identify an appropriate position for you.
It is our policy to keep all applications in an active file for one year. If you do not hear from us, we will place your application in our file for future consideration.

We thank you for your interest in PeopleSoft and wish you well in your pursuit of new goals.

Sincerely,

Barbara Smith
Employment Coordinator

CHAPTER 15

Application Fundamentals Reports

PeopleSoft 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.

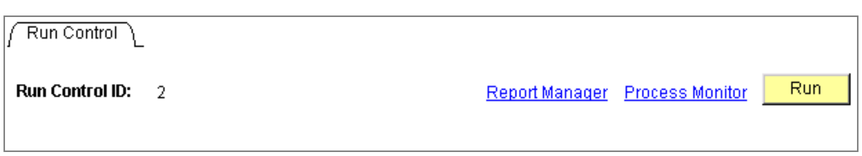
For more information on generating these reports, see Introduction to PeopleSoft Reporting. For a complete listing of all Human Resources reports by Report Name, see List of Reports in PeopleSoft Human Resources.

Common PeopleSoft HRMS Report Run Control Pages

Some of the PeopleSoft HRMS reports are generated from run control pages that are common to many reports. This section documents these common run control pages.

PRCSRUNCNTL Page

Usage	This run control page is used to run many PeopleSoft HRMS processes and to generate many different PeopleSoft HRMS reports.
Object Name	PRCSRUNCNTL
Navigation	**This page is used by a wide variety of reports and processes. Navigation depends on the report to be run.**
Prerequisites	None
Access Requirements	Enter a Run Control ID.



PRCSRUNCNTL page

Run Control ID	The system displays the run control ID that you entered when you accessed the page.

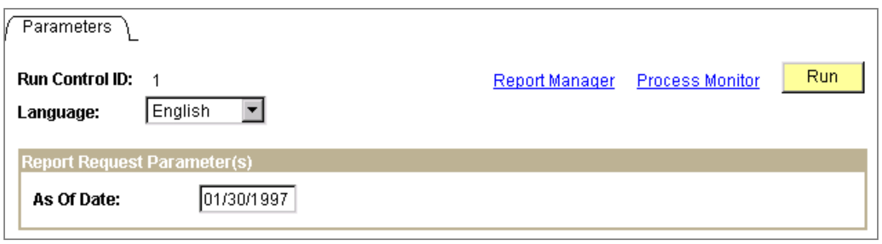
Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler. For more information about reports generated by this run control page, see the documentation of individual reports in the PeopleSoft HRMS application PeopleBooks.

RUNCTL_ASOFDATE Page

Description	This run control page is used to generate multiple PeopleSoft HRMS reports.
Object Name	RUNCTL_ASOFDATE
Navigation	• **Define Business Rules, Administer HR System, Process, Refresh PS_EMPLOYEES table, Parameters** • **Administer Workforce, Administer Workforce (GBL), Process, As-of-Date Request, Parameters** • **Administer Workforce, Administer Workforce (GBL), Report, Temporary Employees, Temporary Employees** • **Administer Workforce, Administer Workforce (USF), Process, Refresh Employees Table, Parameters** • **Administer Workforce, Administer Workforce (USF), Report, Compa_Ratio Analysis, Parameters** • **Administer Workforce, Administer Workforce (USF), Report, Temporary Employees, Temporary Employees** • **Administer Workforce, Manage Performance (USF), Report, Appraisals by Evaluation Pts, Job Grading by Evaluation Pts** • **Develop Workforce, Manage Positions, Report, Active Position History, Parameters** • **Develop Workforce, Manage Positions, Report, Build Position Structure, Parameters** • **Develop Workforce, Manage Positions, Report, Position Status, Parameters** • **Develop Workforce, Manage Positions (USF), Report, Build Position Structure, Parameters** • **Administer Workforce, Mass Organization Changes USF, Process, Build Position Structure, Parameters** • **Administer Workforce, Plan Salaries (GBL), Report, Above**

	Maximum Analysis, Above Maximum Analysis • **Administer Workforce, Plan Salaries (GBL), Report, Below Minimum Analysis, Below Minimum Analysis** • **Administer Workforce, Plan Salaries (GBL), Report, Compa_Ratio Analysis, Compa_Ratio Analysis** • **Administer Workforce, Plan Salaries (GBL), Report, Job Grading by Evaluation Pts, Job Grading by Evaluation Pts** • **Administer Workforce, Plan Salaries (GBL), Report, Salary Structure, Salary Structure** • **Monitor Workplace, Report Regulations (UK), Report, Joint Staffing Report, Runctl Asofdate** • **Monitor Workplace, Report Regulations (US), Report, EEO-5 Job Analysis, Parameters**
Access Requirements	Enter a Run Control ID.



RUNCTL_ASOFDATE page

Run Control ID	The system displays the **Run Control ID** that you entered when you accessed the page.
Language	Select the language in which you want the system to print the report.
As Of Date	Enter the date as of which you want the system to report the data.

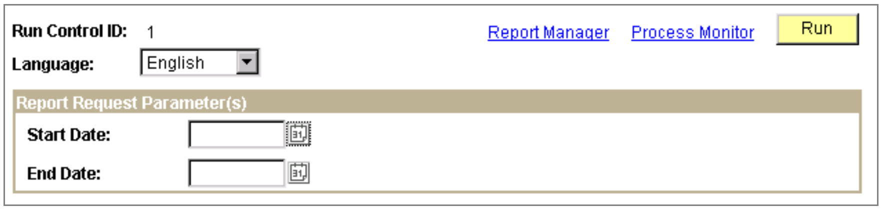
Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

RUNCTL_FROMTHRU Page

Description	This run control page is used to generate multiple PeopleSoft HRMS

	reports.
Object Name	RUNCTL_FROMTHRU
Navigation	• **Administer Workforce, Administer Workforce (GBL), Process, Database Audit, Database Audit** • **Administer Workforce, Administer Workforce (GBL), Process, From/Thru Dates Request, Parameters** • **Administer Workforce, Administer Workforce (GBL), Report, Employee Turnover Analysis, Employee Turnover Analysis** • **Administer Workforce, Administer Workforce (GBL), Report Lcl, CAN Hire List, Hire List** • **Administer Workforce, Administer Workforce (USF), Process, Database Audit, Database Audit** • **Administer Workforce, Administer Workforce (USF), Process, From/Thru Dates Request, Parameters** • **Administer Workforce, Administer Workforce (USF), Report, Employee Turnover Analysis, Employee Turnover Analysis** • **Administer Workforce, Monitor Absence (GBL), Report, Absence Periods, Absence Spells** • **Administer Workforce, Monitor Absence (GBL), Rep Lcl, UK Bradford Score, Bradford Score Report** • **Administer Workforce, Plan Salaries (GBL), Report, Employee with Merit, Employee with Merit** • **Administer Workforce, Plan Salaries (GBL), Report, Employee without Merit, Employee without Merit** • **Develop Workforce, Recruit Workforce (GBL), Report, Job Group Movement Analysis, Parameters** • **Monitor Workplace, Report Regulations (UK), Report, Adverse Impact Report, Parameters** • **Monitor Workplace, Report Regulations (UK), Report, Termination Analysis, Parameters** • **Monitor Workplace, Report Regulations (US), Report, Adverse Impact, Parameters** • **Monitor Workplace, Report Regulations (US), Report, Job Group Movement Analysis, Parameters** • **Monitor Workplace, Report Regulations (USF), Report, Adverse Impact, Parameters**
Access Requirements	Enter a Run Control ID.



RUNCTL_FROMTHRU page

Run Control ID The system displays the **Run Control ID** that you entered when you accessed the page.

Language Select the language in which you want the system to print the report.

Start Date Enter the begin date of the period for which you want the system to report the data.

End Date Enter the end date of the period for which you want the system to report the data.

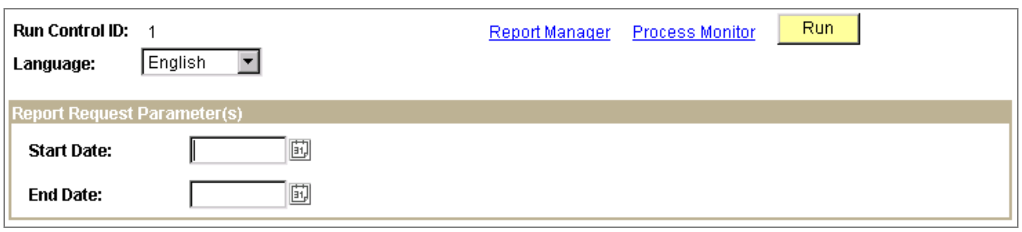
Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

RUNCTL_OHS_FROMTO Page

Usage	This run control page is used to generate multiple PeopleSoft Human Resources reports.
Object Name	RUNCTL_OHS_FROMTO
Navigation	• **Administer Workforce, Manage Labor Relations (GBL), Report, Discipline Action Summary, Discipline Action Summary** • **Administer Workforce, Manage Labor Relations (GBL), Report, Grievance Summary, Grievance Summary** • **Administer Workforce, Manage Labor Relations (USF), Report, Discipline Action Summary, Discipline Action Summary** • **Administer Workforce, Manage Labor Relations (USF), Report, Grievance Summary, Grievance Summary** • **Monitor Workplace, Monitor Health/Safety (GBL), Report, Non-Employees In Incidents, Non-Employees In Incidents** • **Monitor Workplace, Monitor Health/Safety (GBL), Report, Incident Summary, Incident Summary** • **Monitor Workplace, Monitor Health/Safety (GBL), Report,**

	Location Incident Summary, Location Incident Summary • **Monitor Workplace, Monitor Health/Safety (GBL), Report, Claim Summary Overview, Claim Summary Overview** • **Monitor Workplace, Monitor Health/Safety (GBL), Report, Employees In Incidents, Employees In Incidents** • **Monitor Workplace, Monitor Health/Safety (GBL), Report, Incident Lost Work, Incident Lost Work** • **Monitor Workplace, Monitor Health/Safety (GBL), Report, Vehicle Incident Summary, Vehicle Incident Summary** • **Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, ESP Incident without Lost W., Incident Lost Work**
Prerequisites	None
Access Requirements	Enter a Run Control ID.



RUNCTL_OHS_FROMTO page

Run Control ID The system displays the **Run Control ID** that you entered when you accessed the page.

Language Select the language in which you want the system to print the report.

Start Date Enter the begin date of the period for which you want the system to report the data.

End Date Enter the end date of the period for which you want the system to report the data.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

List of Application Fundamentals Reports

Report Name	***Report ID***	***Location***	***Global or Local***
Above-Maximum Analysis	CMP005	Administer Workforce, Plan Salaries, Report	GBL
Agency Table report	FGPER803	Define Business Rules, Manage Human Resources (USF), Report, Agency Table	USF
Can Job Code Table report	PER709B	Define Business Rules, Manage Human Resources (GBL), Report Lcl, CAN Job Code Table	Canada
Company Table report	PER707	Define Business Rules, Manage Human Resources (GBL), Report, Company Table	GBL
Country Table report	PER708	Define Business Rules, Define General Options, Report, Country Table	GBL
Currency Code Table report	PER713	Define Business Rules, Define General Options, Report, Currency Code Table	GBL
Currency Rate Table report	PER714	Define Business Rules, Define General Options, Report, Currency Rate Table	GBL
Department Table report	PER701	Define Business Rules, Manage Human Resources (GBL), Report, Department Table Define Business Rules, Manage Human Resources (USF), Report, Department Table	GBL
Geographic Location Table report	FGPER802	Define Business Rules, Manage Human Resources (USF), Report, Geographic Location Table	USF

Group Member Overlap report	GBP001	Define Business Rules, Manage Human Resources (GBL), Report, Group Member Overlap Define Business Rules, Manage Human Resources (USF), Report, Group Member Overlap	GBL
Group Membership report	GBP002	Define Business Rules, Manage Human Resources (GBL), Report, Group Membership Define Business Rules, Manage Human Resources (USF), Report, Group Membership	GBL
Handicap Table report	FGPER811	Define Business Rules, Manage Human Resources (USF), Report, Handicap Table	USF
Installation Table report	PER702	Define Business Rules, Define General Options, Report, Installation Table	GBL
Job Code Table report	PER709C	Define Business Rules, Manage Human Resources (GBL), Report, Job Code Table	GBL
Legal Authority Table report	FGPER812	Define Business Rules, Manage Human Resources (USF), Report, Legal Authority Table	USF
LEO Pay Area Table report	FGPER808	Define Business Rules, Manage Human Resources (USF), Report, LEO Pay Area Table	USF
Locality Pay Area Table report	FGPER807	Define Business Rules, Manage Human Resources (USF), Report, Locality Pay Area Table	USF
Location Table report	PER705	Define Business Rules, Manage Human Resources (GBL), Report, Location Table	GBL

Multiple Seniority Components report	PER044	Administer Workforce, Administer Workforce (GBL), Report, Multiple Seniority Components	GBL
Nature of Action Table report	FGPER813	Define Business Rules, Manage Human Resources (USF), Report, Nature of Action Table	USF
NOA Authority 1 report	FGPER814	Define Business Rules, Manage Human Resources (USF), Report, NOA Authority 1	USF
Pay Group report	PAY711	Define Business Rules, Manage Human Resources (USF), Report, Pay Group	USF
Pay Plan report	PAY717	Define Business Rules, Manage Human Resources (USF), Report, Pay Plan	USF
Personnel Office ID Table report	FGPER805	Define Business Rules, Manage Human Resources (USF), Report, Personnel Office ID Table	USF
Priority Placement Table report	FGPER816	Define Business Rules, Manage Human Resources (USF), Report, Priority Placement Table	USF
Standard Letter Table report	PER711	Develop Workforce, Recruit Workforce (GBL), Report, Standard Letter Table Develop Workforce, Recruit Workforce (USF), Report, Standard Letter Table Develop Workforce, Administer Training (GBL), Report, Standard Letter Table Develop Workforce, Administer Training (USF), Report, Standard Letter Table	GBL
State Table report	FGPER809	Administer Workforce, Administer Workforce (USF), Report, Award Action Data, State Table	USF

Sub-Agency Table report	FGPER804	Define Business Rules, Manage Human Resources (USF), Report, Sub-Agency Table	USF
U.S. County Table report	FGPER806	Define Business Rules, Manage Human Resources (USF), Report, U.S. County Table	USF
US Job Code Table report	PER709A	Define Business Rules, Manage Human Resources (GBL), Report Lcl, US Job Code Table	USA
USF Job Code Table report	FGPER823	Define Business Rules, Manage Human Resources (USF), Report, Job Code Table Develop Workforce, Manage Positions (USF), Report, Job Code Table	USF
Work Location Table report	FGPER817	Define Business Rules, Manage Human Resources (USF), Report, Work Location Table	USF

Reporting Control Table Data

PeopleSoft provides you with multiple reports so that you can report on the data you've set up in the PeopleSoft HRMS control tables.

List of Reports Run Using the PRCSRUNCNTL Run Control Page

Under the **Manage Human Resources (GBL), Report, Manage Human Resources (USF), Report,** and **Define General Options, Report** menus in PeopleSoft HRMS, you'll find several variations of the same page. The object page name (PRCSRUNCNTL) remains the same throughout, as do the fields; however, the actual names of the page and the reports produced vary depending on the business process.

Use the PRCSRUNCNTL Page to run the following reports:

- Department Table report
- Agency Table report
- CAN Job Code Table report
- Company Table report

- Country Table report
- Currency Code Table report
- Currency Rate Table report
- Geographic Table report
- Handicap Table report
- Installation Table report
- Job Code Table report
- Legal Authority Table report
- LEO Pay Area Table report
- Locality Pay Area Table report
- Location Table report
- Nature of Action Table report
- NOA/Authority 1 report
- Pay Group report
- Pay Plan report
- Personnel Office ID Table report
- Priority Placement Table report
- State Table report
- Sub-Agency Table report
- US County Table report
- US Job Code Table report
- Work Location Table report

Generating the Company Table Report

The 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).

Run Control Page

Usage	Use the Run Control page to run the Company Table report.
Navigation	**Define Business Rules, Manage Human Resources (GBL), Report, Company Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Company Table Report

Description	The Company Table contains all individual companies within your organization. Typically, you set up companies in this table when they have their own federal identification numbers. You must set up at least one company in this table. This report prints all companies in the Company Table and default information, including name and address, company code, and effective date. Payroll-related information includes deduction code, earnings code, the default pay group, applicable earnings codes, number of pay lines contained on the pay sheet page, and the holiday schedule used.
Report ID	PER707
Type of Report	A separate report program (PAY702) prints the General Ledger information you enter in the Company Table.
Parameters	Crystal Report
Source	PRCSRUNCNTL
Source Records	COMPANY_TBL
Sorted By	Company, Effective Date (descending order)

Generating the Country Table Report

The Country Table report prints a list all countries with their two-character codes.

Run Control Page

Usage	Use the Run Control page to run the Country Table report.
Navigation	**Define Business Rules, Define General Options, Report, Country**

	Table
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Country Table Report

Description	PeopleSoft supplies the country codes used in all address formats in the Country Table. This report lists all countries with their two-character codes.
Report ID	PER708
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	COUNTRY_TBL
Sorted By	Country

Generating the Currency Code Table Report

The Currency Code Table report prints information about each currency; including the code, effective date, description, short description, currency symbol, country, and decimal position.

Run Control Page

Usage	Use the Run Control page to run the Currency Code Table report.
Navigation	**Define Business Rules, Define General Options, Report, Currency Code Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Currency Code Table Report

Description	The Currency Code Table contains valid currency codes. Before you can use international currencies, you need to enter one of the codes from this table on the Installation Table. The Currency Code Table report prints information about each currency; including the code, effective date, description, short description, currency symbol, country, and decimal position.
Report ID	PER713
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	CURRENCY_CD_TBL
Sorted By	Currency Code, Effective Date, Description, Short Description

Generating the Currency Rate Table Report

The Currency Rate Table report prints information about exchange rates, including from/to currencies, exchange rate type, effective date, and the rate exchange.

Run Control Page

Usage	Use the Run Control page to run the Currency Rate Table report.
Navigation	**Define Business Rules, Define General Options, Report, Currency Rate Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Currency Rate Table Report

Description	The Currency Rate Table contains exchange rates for foreign currencies. The Currency Rate Table report prints information about exchange rates, including from/to currencies, exchange rate type, effective date, and the rate exchange.

Report ID	PER714
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	CUR_RT_TBL
Sorted By	From Currency, Currency Exchange Rate Type, Effective Date

Generating the Department Table Report

The Department Table report lists all departments by Department ID.

Run Control Page

Usage	Use the Run Control page to run the Department Table report.
Navigation	**Define Business Rules, Manage Human Resources (GBL), Report, Department Table** **Define Business Rules, Manage Human Resources (USF), Report, Department Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Department Table Report

Description	You store data about the departments in your organization in the Department Table, including departmental reporting hierarchy and security access information. The Department Table report lists all departments by Department ID. It includes the effective date of each department, its name, and its location code. The Manager ID is the Employee ID that appears as a default in the Manager ID fields for that department. The last column shows the General Ledger Account number, if assigned, for this department.
Report ID	PER701
Type of Report	Crystal Report

Parameters	Department
Source	PRCSRUNCNTL
Source Records	DEPT_TBL
Sorted By	Department ID, Effective Date

Generating the Installation Table Report

The Installation Table report lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.

Run Control Page

Usage	Use the Run Control page to run the Installation Table report.
Navigation	**Define Business Rules, Define General Options, Report, Installation Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Installation Table Report

Description	The Installation Table contains various defaults used for all PeopleSoft Human Resource applications. You must set it up during installation as a base for establishing other tables. The Installation Table Report lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number. It also shows whether your organization allows employees to hold multiple jobs and consists of more than one company, and it shows the last number in the automatic Employee or Applicant ID numbering sequence.
Report ID	PER702
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL

Source Records	INSTALLATION, PSOPTIONS
Sorted By	Company

Generating the Job Code Table Report

The Job Code Table report prints a list of all job codes and the date on which they become effective.

Run Control Page

Usage	Use the Run Control page to run the Job Code Table report.
Navigation	**Define Business Rules, Manage Human Resources (GBL), Report, Job Code Table** **Define Business Rules, Manage Human Resources (USF), Report, Job Code Table** **Develop Workforce, Manage Positions (USF), Report, Job Code Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Job Code Table Report

Description	The Job Code Table holds the codes and descriptions for all the jobs in your organization. This report prints a list of all job codes and the date on which they become effective. The information shown about each code includes the salary administration plan, grade, step, standard work hours, Job Family, and the breakdown of job evaluation criteria points.
Report ID	PER709C
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	JOBCODE_TBL

Sorted By	Job Code, Effective Date (descending order)

USF Job Code Table Report

Description	The Job Code Table holds the codes and descriptions for all the jobs in your organization. This report prints a list of all job codes and the date on which they become effective. The information shown about each code includes: pay plan, grade, FLSA status, standard workweek, workers' compensation codes, EEO information, and the breakdown of job evaluation criteria points.
Report ID	FGPER823
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	JOBCODE_TBL
Sorted By	Job Code, Effective Date (descending order)

Generating the Can Job Code Table Report

The 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.

Run Control Page

Usage	Use the Run Control page to run the Job Code Table report.
Navigation	**Define Business Rules, Manage Human Resources (GBL), Report Lcl, CAN Job Code Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

CAN Job Code Table Report

Description	The Job Code Table holds the codes and descriptions for all the jobs in your organization. This report prints a list of all job codes and the date on which they become effective, and contains Canadian-specific

	information you enter on the Job Data pages. For each code, the report prints the salary administration plan, grade, step, and the Canadian Standard Occupational Classification and Pay Equity Job Class codes.
Report ID	PER709B
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	JOBCODE_TBL
Sorted By	Job Code, Effective Date (descending order)

Generating the US Job Code Table Report

The 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.

Run Control Page

Usage	Use the Run Control page to run the Job Code Table report.
Navigation	**Define Business Rules, Manage Human Resources (GBL), Report Lcl, US Job Code Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

US Job Code Table Report

Description	The Job Code Table holds the codes and descriptions for all the jobs in your organization. This 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. The information shown about each code includes the salary administration plan, grade, FLSA status, standard workweek, workers' comp codes, EEO information, and the breakdown of job evaluation criteria points.
Report ID	PER709A
Type of	Crystal Report

Report	
Parameters	None
Source	PRCSRUNCNTL
Source Records	JOBCODE_TBL
Sorted By	Job Code, Effective Date (descending order)

Generating the Location Table Report

The 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).

Run Control Page

Usage	Use the Run Control page to run the Location Table report.
Navigation	**Define Business Rules, Manage Human Resources (GBL), Report, Location Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Location Table Report

Description	You establish the physical locations within your company in the Location Table. 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). In addition, the report gives the location name and abbreviation, Building ID, and address. It also identifies the number of hours you use to define the standard workweek for each location and the Establishment ID, as required for U.S. federal reporting.
Report ID	PER705
Type of Report	Crystal Report
Parameters	Location
Source	PRCSRUNCNTL

Source Records	LOCATION_TABLE
Sorted By	Location, Effective Date (descending order)

USF Generating the Agency Table Report

The Agency Table report prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date.

Run Control Page

Usage	Use the Run Control page to run the Agency Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Agency Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Agency Table Report

Description	The Agency Table contains all individual agencies within your organization. Typically, you set up agencies in this table when they have their own federal identification numbers. You must set up at least one agency in this table. This report prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date. Payroll-related information includes deduction code, earnings code, the default pay group, applicable earnings codes, number of pay lines contained on the pay sheet page, and the holiday schedule used.
Report ID	FGPER803
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	COMPANY_TBL
Sorted By	Agency, Effective Date (descending order)

USF Generating the Geographic Location Table Report

The Geographic Location Table report produces a detailing of the Geographic Location Table.

Run Control Page

Usage	Use the Run Control page to run the Geographic Location Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Geographic Location Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Geographic Location Table Report

Description	The produces a detailing of the Geographic Location Table.
Report ID	FGPER802
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_GEOLOC_TBL
Sorted By	Location Code

USF Generating the Handicap Table Report

The Handicap Table report prints all disabilities and their associated codes.

Run Control Page

Usage	Use the Run Control page to run the Handicap Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Handicap Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Handicap Table Report

Description	The Handicap Table contains descriptions and codes for every disability you need to track in your agency. This report prints all disabilities and their associated codes.
Report ID	FGPER811
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_HANDICAP_TBL
Sorted By	Disability Code, Effective Date (descending order)

USF Generating the LEO Pay Area Table Report

The LEO Pay Area Table report prints each LEO Special Pay Area and associated percentage.

Run Control Page

Usage	Use the Run Control page to run the LEO Pay Area Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, LEO Pay Area Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

LEO Pay Area Table Report

Description	The LEO Pay Area Table contains the name and LEO percentage of all LEO Special Pay Areas. This report lists each LEO Special Pay Area

	and associated percentage.
Report ID	FGPER808
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_LEOAREA_TABLE
Sorted By	LEO Special Pay Area, Effective Date (descending order)

USF Generating the Legal Authority Table Report

The Legal Authority Table report prints the information about the legal authorities you set up in the Legal Authority table.

Run Control Page

Usage	Use the Run Control page to run the Legal Authority Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Legal Authority Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Legal Authority Table Report

Description	The Legal Authority Table report prints the information about the legal authorities you set up in the Legal Authority table.
Report ID	FGPER812
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_LEGAL_AUTH_TBL

Sorted By	Legal Authority Code, Effective Date (descending order)

USF Generating the Locality Pay Area Table Report

The Locality Pay Area Table report prints information for every Locality Pay Area.

Run Control Page

Usage	Use the Run Control page to run the Locality Pay Area Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Locality Pay Area Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Locality Pay Area Table Report

Description	The Locality Pay Area Table contains the name, locality percentage, and IGA percentage of all government-recognized localities. This report prints information for every Locality Pay Area.
Report ID	FGPER807
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_LOCAREA_TABLE
Sorted By	Locality Pay Area, Effective Date (descending order)

USF Generating the Nature of Action Table Report

The Nature of Action Table report prints a detailing of the Nature of Action Table.

Run Control Page

Usage	Use the Run Control page to run the Nature of Action Table report.

Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Nature of Action Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Nature of Action Table Report

Description	OPM (Office of Personnel Management) supplies unique numerical codes that identify, for statistical and data processing purposes, the particular nature of action. These codes are captured in the Nature of Action table. This report generates a detailing of the Nature of Action Table.
Report ID	FGPER813
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_NOAC_TBL
Sorted By	Nature of Action Code, Effective Date (descending order)

USF Generating the NOA Authority 1 Report

The NOA Authority 1 report prints a detailing of the Nature of Action/Authority 1 Table.

Run Control Page

Usage	Use the Run Control page to run the NOA Authority 1 report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, NOA Authority 1**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

NOA Authority 1 Report

Description	The NOA/Legal Authority table is a validity table used for ensuring that only valid combinations of NOACs and Legal Authorities are used. This report generates a detailing of the Nature of Action/Authority 1 Table.
Report ID	FGPER814
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_NOAC_TBL, GVT_LEGAL_AUTH_TBL
Sorted By	Nature of Action Code, Effective Date (descending order)

USF Generating the Pay Group Report

The Pay Group report prints each pay group and its effective date along with the processing characteristics that apply to that group.

Run Control Page

Usage	Use the Run Control page to run the Pay Group report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Pay Group**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Pay Group Report

Description	You use the Pay Group Table to establish pay groups within an agency. A pay group is a set of employees grouped together in the same payroll processing frequency because they share the same earnings and deductions and use the same check or direct deposit stock. This report prints each pay group and its effective date along with the processing

	characteristics that apply to that group.
Report ID	PAY711
Type of Report	SQR
Parameters	None
Source	PRCSRUNCNTL
Source Records	PAYGROUP_TBL
Sorted By	Pay Group, Effective Date (descending order)

USF Generating the Pay Plan Report

The Pay Plan report prints a detailing of your pay plan definitions.

Run Control Page

Usage	Use the Run Control page to run the Pay Plan report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Pay Plan**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Pay Plan Report

Description	Prints a detailing of your pay plan definitions.
Report ID	PAY717
Type of Report	SQR
Parameters	None
Source	PRCSRUNCNTL
Source Records	ERN_PROGRAM_TBL, ERN_PROGRAM_DEF, EARNINGS_TBL
Sorted By	Earnings Program ID

USF Generating the Personnel Office ID Table Report

The Personnel Office ID Table report prints information about all Personnel Offices in your agency.

Run Control Page

Usage	Use the Run Control page to run the Personnel Office ID Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Personnel Office ID Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Personnel Office ID Table Report

Description	The Personnel Office ID Table contains the name, address, agency, sub-agency, telephone number, and location of each Personnel Office in your organization. This report prints information about all Personnel Offices in your agency.
Report ID	FGPER805
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_POI_TABLE
Sorted By	Personnel Office ID, Effective Date (descending order)

USF Generating the Priority Placement Table Report

The Priority Placement Table report prints a detailing of the Priority Placement Table.

Run Control Page

Usage	Use the Run Control page to run the Priority Placement Table report.

Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Priority Placement Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Priority Placement Table Report

Description	This generates a detailing of the Priority Placement Table.
Report ID	FGPER816
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_PRIO_TBL
Sorted By	Priority Placement Code

USF Generating the State Table Report

The State Table report prints a list of all the states and their numeric codes.

Run Control Page

Usage	Use the Run Control page to run the State Table report.
Navigation	**Administer Workforce, Administer Workforce (USF), Report, Award Action Data, State Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

State Table Report

Description	PeopleSoft supplies names and numeric codes for every state in the State Table. This report lists states and their numeric codes.
Report ID	FGPER809
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	STATE_NAMES_TABLE
Sorted By	State

USF Generating the Sub-Agency Table Report

The Agency Table report prints all sub-agencies in the Sub-Agency Table and their associated agencies.

Run Control Page

Usage	Use the Run Control page to run the Sub-Agency Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Sub-Agency Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Sub-Agency Table Report

Description	The Sub-Agency Table contains all individual sub-agencies within your organization. This report prints all sub-agencies in the Sub-Agency Table and their associated agencies.
Report ID	FGPER804
Type of Report	Crystal Report

Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_SUBAGCY_TABLE
Sorted By	Sub-agency, Effective Date (descending order)

USF Generating the U.S. County Table Report

The U.S. County Table report prints all counties with their associated two-digit county codes.

Run Control Page

Usage	Use the Run Control page to run the U.S. County Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, U.S. County Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

U.S. County Table Report

Description	PeopleSoft supplies counties and county codes in the U.S. County Table. This report lists all counties with their associated two-digit county codes.
Report ID	FGPER806
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_COUNTY_TABLE
Sorted By	County

USF Generating the Work Location Table Report

The Work Location Table report prints a detailing of the Work Location Table.

Run Control Page

Usage	Use the Run Control page to run the Work Location Table report.
Navigation	**Define Business Rules, Manage Human Resources (USF), Report, Work Location Table**
Access Requirements	Enter a Run Control ID

For more information about this run control page, see PRCSRUNCNTL Page.

Work Location Table Report

Description	This generates a detailing of the Work Location Table.
Report ID	FGPER817
Type of Report	Crystal Report
Parameters	None
Source	PRCSRUNCNTL
Source Records	GVT_LOC_TABLE1
Sorted By	Location Code, Effective Date (descending order)

Group Build Reports

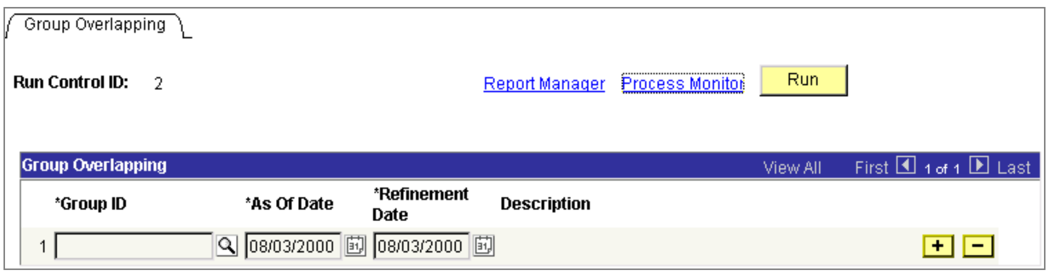
The Group Build feature generates a few reports, which are found under the **Manage Human Resources (GBL), Report** and **Manage Human Resources (USF), Report** menus. Those reports are listed and discussed in this section.

Generating the Group Member Overlap Report

There may be situations where you want to make sure that each employee belongs to just one group. For instance, if you are administering merit increases to several employee groups, you may want to make sure there is no overlap so you won’t give the same employee two different merit increases. The Group Member Overlap report shows you when members belong to more than one group.

Group Overlapping Page

Usage	Use the Group Overlapping page to run the Group Member Overlap Report.
Object Name	RUNCTL_GBP001
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Report, Group Member Overlap, Group Overlapping** • **Define Business Rules, Manage Human Resources (USF), Report, Group Member Overlap, Group Overlapping**
Access Requirements	Enter a Run Control ID.



Group Overlapping page

Group ID Enter the ID of the group whose members you want to view.

As Of Date Since Group definitions are effective-dated, you may have defined several versions of the same group for different dates. Enter the effective date to specify the Group Definition valid as of this date. The report will list 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.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Group Member Overlap Report

Description	There may be situations where you want to make sure that each employee belongs to just one group. For instance, if you are administering merit increases to several employee groups, you may want to make sure there is no overlap so you won't give the same employee two different merit increases. The Group Member Overlap report shows you when members belong to more than one group.
Report ID	GBP001
Type of Report	SQR
Parameters	Group ID, Group As Of Date, and Refinement Date
Source	RUNCTL_GBP001
Source Records	JOB, PERSONAL_DATA, EMPLOYMENT, PERS_DATA_EFFDT, COMPENSATION, TL_EMPL_DATA
Sorted By	EmplID, Employee Name, Employee Record Number, Job Code

Generating a Group Membership Report

When you define a group through the Group Definition pages, you don't specify any time limits on group membership. This means that some groups may have very large lists of members. To help you manage these potentially unwieldy groups, You can use the Group Membership report to view group members.

Group Membership Page

Usage	Use the Group Membership page to generate a report listing all the members in a particular group.
Object Name	RUNCTL_GBP002
Navigation	• **Define Business Rules, Manage Human Resources (GBL), Report, Group Membership, Group Membership** • **Define Business Rules, Manage Human Resources (USF), Report, Group Membership, Group Membership**
Access Requirements	Enter a Run Control ID.

Group Membership page

Group As Of Date

Since Group definitions are effective-dated, you may have defined several versions of the same group for different dates. Enter the effective date to specify the Group Definition valid as of this date. The report will list the members who belong to the group as of the current date, or as of the date you specify in the **Refinement Date** field.

Group ID

Enter the ID of the group whose members you want to view.

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.

Click **Run** to run the report using Process Scheduler.

For more information about Process Scheduler, see Process Scheduler.

Group Membership Report

Description	When you define a group through the Group Definition pages, you don't specify any time limits on group membership. This means that some groups may have very large lists of members. To help you manage these potentially unwieldy groups, You can use the Group Membership report to view group members.
Report ID	GBP002
Type of	SQR

Report	
Parameters	Group ID, Group As Of Date, and Refinement Date
Source	RUNCTL_GBP001
Source Records	JOB, PERSONAL_DATA, EMPLOYMENT, PERS_DATA_EFFDT, COMPENSATION, TL_EMPL_DATA
Sorted By	EmplID, Employee Name, Employee Record Number, Job Code

Generating a Multiple Seniority Components Report

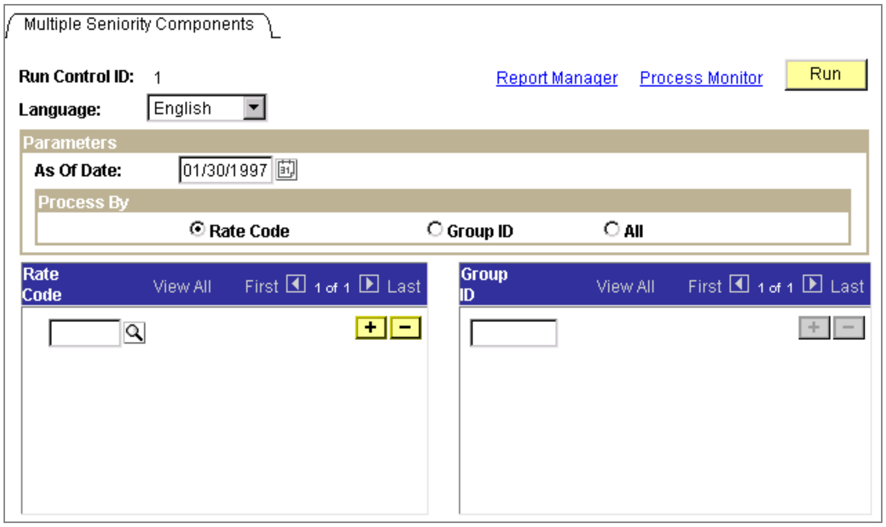
The Multiple Seniority Components report lists all multiple seniority rate codes in workers' compensation packages. This process enables you to check whether the multiple seniority rate codes are appropriate for a worker.

The report checks worker compensation packages for multiple seniority rate codes. If it finds multiple seniority rate codes, the process lists the EmplID (employee ID), the name of the worker, the seniority rate codes, and the corresponding seniority-level information associated with the worker. The report also 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.

Multiple Seniority Components Page

Usage	Use the Multiple Seniority Components page to run the Multiple Seniority Components report.
Object Name	RUNCTL_SENPAY
Navigation	• **Administer Workforce, Administer Workforce (GBL), Process, Update Seniority Eligibility, Update Seniority Eligiblity** • **Administer Workforce, Administer Workforce (GBL), Report, Multiple Seniority Components, Multiple Seniority Components**
Access Requirements	Enter a Run Control ID.



Multiple Seniority Components page

The following fields are common to multiple pages and are defined in PeopleBooks Standard Page Element Definitions **Run Control ID,** and **As Of Date.**

Language Select a **Language Code** from the list of available options. Valid values prompt from the Translate table.

Process By Determine how you want to run the Update Seniority Pay process: by **Rate Code** or by **Group ID.** Select one of the radio buttons.

Rate Code: The process adds or updates seniority rate codes in the compensation packages of all employees in groups that are associated with the seniority rate codes you list on this page. If a seniority rate code is not associated with a group ID, the process adds the seniority rate code to the compensation packages of all workers.

If you click **Rate Code,** the **Rate Code** field in the next section of the page becomes available for data entry.

Group ID: The process adds or updates seniority rate codes in the compensation packages of all employees associated with the groups you list on this page.

If you click **Group ID**, the **Group ID** field in the next section of the page becomes available for data entry.

Clicking the **All** button runs the report for all employees.

Rate Code

This field is available for data entry if you clicked the **Rate Code** button in the **Process By** field. Select one or more **Rate Codes** prompting from the Comp Rate Code Table. Insert rows to run the process using multiple Seniority **Rate Codes**. The system displays the associated **Group IDs** when you leave the field.

Group ID

This field is available for data entry if you clicked **Group ID** in the **Process By** field. Select one or more **Group IDs** prompted by the Group table. Insert rows to run the process using multiple **Group IDs.** The system displays the associated **Rate Codes** when you leave the field. (Groups for which you do not have security access do not appear.)

For more information on defining and building employee groups, see PeopleSoft 8 Application Fundamentals for HRMS, "Working With Groups" For more information on security for employee groups, see PeopleSoft 8 Application Fundamentals for HRMS, "Working With Groups"

Click **Run** to run this request. Process Scheduler runs the Multiple Seniority Components process at user-defined intervals.

For more information about Process Scheduler, see Process Scheduler.

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation or *PeopleSoft HRMS Reporting Tools*.

Multiple Seniority Components Report

Description	The Multiple Seniority Components report lists all multiple seniority pay components in workers' compensation packages.
Report ID	PER044
Type of Report	SQR
Parameters	As of Date, *as well as* Rate Code, Group ID, or All workers.
Source	RUNCTL_SENPAY

Sorted By	Emplid, Rate Code, or Group ID.

Generating the Standard Letter Table Report

The Standard Letter report lists all the letter codes you have set up in your system. You can use these letter codes to generate standard letters as part of your Recruit Workforce, Administer Training, and Manage Labor Relations business processes. Letter codes are also used to generate COBRA letters.

For more information about setting up letter codes and form letters, see Generating Form Letters.

Standard Letter Table Report Page

Usage	Use the Standard Letter Table report page to generate a list of your letter codes.
Navigation	• **Develop Workforce, Recruit Workforce (GBL), Report, Standard Letter Table** • **Develop Workforce, Recruit Workforce (USF), Report, Standard Letter Table** • **Develop Workforce, Administer Training (GBL), Report, Standard Letter Table** • **Develop Workforce, Administer Training (USF), Report, Standard Letter Table**
Prerequisites	You must set up your Standard Letter Table before you run this report.
Access Requirements	Enter a run control ID.

For more information about this page, see PRCSRUNCNTL Page.

Standard Letter Table Report

Description	The Standard Letter Table contains the codes you associate with form letters created for use with mail merge programs. This report lists the codes in your Standard Letter Table.

Report ID	PER711
Type of Report	Crystal
Parameters	None.
Source	PRCSRUNCTL
Source Records	STANDRD_LTR_TBL

GLOSSARY

Numbers

401(a)(17) Limits. The limitations on the earnings that may be included in the calculation of benefits under qualified U.S. pension plans.
415 Limits. The limitations on benefits payable under qualified U.S. pension plans.

Alphabetical

A

Abend. Abnormal **End** (to a process).

Absence: An absence occurs when an employee is not at work (absent) during a normally scheduled work period. Absences may be scheduled or non-scheduled, compensated or uncompensated, excused or unexcused. An absence may occur for a variety of reasons like illness, family emergency, civic obligations (e.g. Military duty or jury duty), or vacation.
Absence Entitlement. Element which defines the rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
Absence Take. Element which defines the conditions that must be met before a payee is entitled to take paid time off.
Accepted Exception: An exception that has been reviewed and validated (see Time Management)
Accommodations. Accommodations are efforts your organization is able to make for employees or applicants with disabilities, such as purchasing special equipment or making structural changes to a work environment.
Accredited Education. Education above the high school level completed in a U.S. college, university, or other educational institution that has been credited by one of the accrediting agencies or associations recognized by the Secretary, U.S. Department of Education.
Accrual. Any hours that employees accumulate for use at another time in the form of earned vacation time or sick leave, for example.
Accrual Basis Accounting. Accounting that records the impact of a business event as it occurs, regardless of whether the transaction affected cash.
Accrual Class Codes. Classes or categories of accruals.
Accrual Type. Defines an accrual such as annual leave or sick leave.
Accumulator. Element which allows you to combine several elements. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated. See also Time Administration.

Accumulator [Global Payroll]. Element which provides a means for storing the cumulative values of defined items as they are processed. As you make payments, take deductions, and perform calculations, you'll use accumulators to track accumulated amounts, or balances. You can accumulate a single value over time or multiple values over time, as your requirements specify. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
Action and Conditions. A process that defines actions and conditions independently of one another and then combines them to create a complete rule (see Rule Creation)
Action Reason. The reason an employee's job or employment information is updated. The action reason is entered in two parts: a ***personnel action,*** such as a promotion, termination, or change from one paygroup to another—and a ***reason*** for that action. Action Reason is used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of PeopleSoft Base Benefits.
Activity List. In PeopleSoft Pension Administration, a checklist used to monitor pension-related activities.
Activity Type. Also known as Activity Code. A categorization of work effort. Typically work effort is categorized as productive or non-productive; Repair, Maintenance, Enhancement, or Improvement; or Development or Construction. Activity type is usually required to support cost accounting or financial accounting (recording) functions. It may also be required to support some organizational administration requirements such as organizational productivity goals, or employee performance measurement. In some companies, activity type is inferred from job function, work group affiliation, or organization.
Actual Contribution Percentage (ACP). The amount of an employee's after-tax or employer matching contributions made in a Section 401(m) plan on behalf of highly compensated plan participants, divided by the employee's annual compensation, or an amount determined in the same manner with respect to non-highly compensated employees. PeopleSoft Human Resources base benefits is set up to perform ACP nondiscrimination tests for Section 401(m) plans. See Nondiscrimination Tests and Highly Compensated Employee.
Actual Date. Calendar date in which a punch occurred (see Time Reporting)
Actual Deferral Percentage (ADP). The amount of salary reduction contributions made by an employee to a Section 401(k) plan for a year, divided by the employee's total compensation for that year. PeopleSoft Human Resources base benefits is set up to perform ADP nondiscrimination tests for Section 401(k) plans. See Nondiscrimination Tests and Highly Compensated Employee.
Actuarial Assumptions. Any assumptions used to calculate an equivalent benefit for an optional form of payment or an alternative retirement date.
Actuarial Valuation Extract. A PeopleSoft Pension Administration data extract containing data that a plan actuary needs in order to determine the plan's assets and liabilities.
Actuarial Valuation. A comparison of a pension plan's assets and liabilities.
Advice. The Form that employees who choose direct payroll deposit receive in lieu of a check.
Affiliate. A control person of a corporation. Generally, an officer, director, or major shareholder who has the ability to influence the corporate management decisions.
Affirmative Action (AA). United States regulations require employers to prepare affirmative action plans that are intended to provide equal employment representation within their workforce, with respect to ethnicity, gender and age.
After-tax Deductions. Deductions that reduce net pay. These deductions are subtracted from gross pay after taxes have been taken out. Also called "post-tax" deductions.
Agency. Any Department or independent establishment of the Federal Government, including a government-owned or -controlled corporation, that has the authority to hire employees in the competitive, excepted, and senior executive services.

Aggregate Reporting. The ability to report time as a collection or mass. In Time and Labor aggregate time reporting features include the ability to report time in a lump sum, as a pattern, in a range of dates, or for an entire crew.
Alias. Any of several PeopleSoft Pension Administration utilities that look up or calculate employee information.
Allotment. This is a voluntary deduction from pay. Employees may elect up to two allotments from pay, transmitted to a financial institution to the employee's checking or savings account.
Alternative Minimum Tax (AMT). ATM is calculated by adjusting the taxpayer's regular taxable income with a number of tax preference items and adjustments. Tax preference items are positive items increasing Alternative Minimum Taxable Income (AMTI) and are excluded from regular taxable income. Tax preference items include gain from the exercise of incentive stock options.
Americans with Disabilities Act (ADA). This Act prohibits employers with U.S. operations from discriminating against applicants or employees with disabilities.
Annual Declaration Report. The French Annual Declaration report is a payroll report which checks establishment profiles to see whether an establishment has to produce the report, and then calculates the amount of all the social security contributions for this establishment.
Annual Leave. Annual leave is absence from work with pay and must be approved by the employee's supervisor in advance. This type of leave (Plan Type 51) is accrued based on years of service: Full-time Permanent/Full-time Seasonal employees ...0-3 years - 4 hours per biweekly pay period; 3-15 years - 6 hours per biweekly pay period (plus an additional 4 hours in the final pay period of the leave year); and 15+ years - 8 hours per biweekly pay period. Part-time Permanent/Part-time Seasonal employees...0-3 years - 1 hour for every 20 hours worked; 3-15 years - 1 hour for every 13 hours worked; 15+ years - 1 hour for every 10 hours worked. Generally, there is a leave year ceiling of 240 hours on accrual; amounts accrued in excess of the ceiling and not used prior to leave year end are forfeited.
Annual Shareholders Meeting. A meeting of corporation's directors, officers, and shareholders held for the purpose of communicating the operating and financial results for the prior year, the prospects for the future and major decisions of management.
Annual Workforce Survey by Nationality and Professional Category (Enquête sur l'activité et les conditions d'emploi de la main d'oeuvre). In France, companies are required to submit the Annual Workforce Survey by Nationality and Professional Category to the Ministry of Labor. This report provides an analysis of the company's foreign workforce, which includes any employee who does not have French citizenship.
Annualized Tax Method. A payroll tax calculation method that divides the tax on an annualized amount by the number of pay periods in the year to find withholding for a given pay period, based on the number of withholding allowances. Annualized is the most common tax method.
Annuitant Amount. The gross monthly annuity a federally retired employee receives.
Annuitant CSA Number. A unique number assigned by OPM for a retired employee.
Annuitant Indicator. A code used to indicate the status of an annuitant appointed to a position in the Federal civilian service. Text for the codes is as follows:

1. Reemployed annuitant - Civil Service/FERS
2. Retired military officer receiving pay
3. Retired military non-officer (enlisted) receiving pay
4. Retired military officer receiving pay and a reemployed annuitant - Civil Service
5. Retired military non-officer (enlisted) receiving pay and a reemployed annuitant - Civil Service

6. Not applicable (none of the above)

A. Reemployed Annuitant – FERS

B. Former Annuitant - FERS

C. Retired Officer/Reemployed Annuitant - FERS

D. Retired Officer/Former Annuitant - FERS

E. Retired Enlisted/Reemployed Annuitant - FERS

F. Retired Enlisted/Former Annuitant - FERS

Annuity. A series of periodic payments made to an individual. Under a pension plan, these payments are generally made monthly.

Anti-Dilutive. Typically, options or shares where the price is greater than the current fair market value of the security.

APE (Activité Principale Exercée) Codes. APE codes classify the type of industry or activity your French company is in, such as software, banking or insurance. The APE codes are a normalized set of codes that are required by law and are used in regulatory reporting.

Applicant Hire Process. The procedure of hiring an applicant who has been tracked and administered in the Recruitment pages. Once you assign an Employee ID, the system uses recruitment data to populate the fields in the Personal Data pages.

Appointing Authority. The basis that authorized the appointing officer to effect personnel actions on an employee.

Appointing Officer. Denotes if the employee has appointment authority based on laws and regulations.

Approve Time. The Time and Labor feature that approves all employee daily time before it can be sent to payroll for processing. You can approve time by group or by individual employee. You can also unapprove previously approved time.

Approved Time. Payable time that does not have any exceptions.

Approving Official. Individual with the delegated authority responsible for signing the action(s) taken on an employee.

Array. Element which enables you to extract information based on a column value. One way of thinking of an array is that it is a SQL statement that retrieves data from a database table. You define all the pieces of the statement and the system puts them together. An array is not the same as a bracket. An array defines a lookup based on existing tables, which may or may not be payroll tables, in the database.

Arrears Balance. An amount owed to either the employer or employee, usually the result of a deduction not fully taken.

ASCII. American national standard code for information interchange using a coded character set consisting of 7-bit coded characters (8-bits if the parity check is included), that is used for information interchange among data processing system, data communication system, and associated equipment.

Ask Price. The price at which someone who owns a security offers to sell it; also known as the asked price.

Assignment of Life Insurance. Effective 10/3/94, Federal employees can assign their Basic, Option A and Option B insurance to another person(s), firm(s), or trust(s); Option C is excluded. The assignment of benefits transfers ownership of the FEGLI coverage to the assignee(s). The insured no longer has control over his/her insurance coverage and can no longer designate beneficiaries. Assignment is irrevocable. Either all or none of the insurance can be assigned.

Assignment does not have to be to the same person or firm. Assignments must be made in percentages of total insurance versus an assignment of Basic Insurance to one person and Option A to another. Additionally, terminally ill employees can assign their insurance to a Viatical Settlement Firm in exchange for cash (approx. 60% - 85% of the face value of the coverage). Life Expectancy is usually 24 months or less for a Viatical Settlement Agreement.
AT Section. In France this stands for Section Accident du Travail, or Work Accident Section. It is information needed to identify the establishment risk code for insurance purposes.

Attendance. A component of time reporting application whose purpose is to apply business rules related to Benefit Entitlement and Administration and Organizational Administration to time reported as worked or not worked, and to satisfy a variety of reporting needs
Attendance Reporting. A Time and Labor report that indicates an employee's attendance record. It includes sick leave, vacation time, and other leaves taken.
Automatic Spouse Benefit. A joint and survivor pension benefit provided without any actuarial reduction to a pension benefit. The automatic benefit is a n% joint and survivor; the employee is still entitled to choose any optional form of payment and any beneficiary for the remainder of the benefit.
Average Price. The average price derived from either the bid and ask prices (for bid/ask/average) or from the high and low prices (for high/low/average).
Award. A special payment to an employee for certain prescribed kinds of activities or accomplishments.

B

Back Pay Interest. Under certain circumstances, an employee can be eligible to receive additional pay relative to a delayed receipt in salary caused by administrative error in processing a personnel action. The U.S. Office of Personnel Management has established guidelines for Federal agencies on when and how to make these calculations.
Base Pay. A pay component included in the job comp (job compensation rate) calculation. It is pay for a regularly assigned workweek. For example, you can set up a regular hourly rate plus a shift rate, a union-negotiated rate for hazardous work, and so on.
Base Time Zone. Customer defined time zone used for converting reported time to a common time zone for ease of applying rules (see Time Administration)
Batch Processes. Any of the background programs in the client/server environment of PeopleSoft applications. Batch processes perform operations—such as pay confirmation, deduction calculation, and so forth—on groups of records, and are usually scheduled to run on a regular basis. You run these processes from the Process Scheduler, and they are executed through process-specific COBOL programs.
Before-Tax Deduction. Deduction that reduces net pay and FWT taxable gross, applied prior to the calculation of federal and state/provincial withholding taxes. Also called "pre-tax" deductions.
Benefit Commencement Date (BCD). The date on which a pension payee elects to begin receiving payments.
Benefit Deduction. Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Benefit Eligibility. The PeopleSoft Pension Administration function that determines if an employee is eligible for retirement or ancillary benefits. A plan may have several retirement types—normal, early, late, death, and disability—each with its own eligibility criteria.
Benefit Entitlement. Any rules governing the circumstances under which employees are entitled to receive certain benefits. Typically, entitlement to benefits is based on type of employee (for

example, full time, part time, occasional), length of employment, and specific rules which apply thereto, i. e., work group affiliation, and compensation base. Other criteria may also apply, such as reasons-for-claiming or job performance.

Benefit Formula. The formula that determines a participant's pension benefit in a defined benefit plan, as well as the PeopleSoft Pension Administration function that calculates the benefit.

Benefit Plan. A specific benefit within a plan type. For example, your company's life plan type might include benefit plans of one times salary, two times salary, and three times salary.

Benefit Plan Type. Any category of benefit, such as health, life, or savings.

Benefit Tables. Any of the tables that contain employee benefits information. These are often relevant to payroll processing.

Benefit/Deduction Program. A set of benefits and deductions valid for an employee or group of employees. A single company may have any number of programs. An individual employee may belong to only one program; the deductions and benefits contained in that program are the only valid deductions and benefits for that employee.

Benefits Base. The salary used for benefit calculations. The benefits base will be either the employee Annual Rate or Annual Benefits Base Rate.

Betriebszählung (Company Statistics Report). Also called the OFIAMT report. This report provides statistics required by the Swiss Federal Department of Statistics (BFS).

Bid Price. The price a prospective buyer is prepared to pay at a particular time for trading a unit of a given security

Bilan Social Report. See Employee Survey Report.

Blackout Period. The period of time, determined by the company, which prohibits certain activity in the company stock. Blackout Periods can affect the trading of some key individuals or can be placed on the entire company.

Bonus Tax Method. Annualizes your year-to-date earnings by multiplying them by the number of pay periods in the year. This method is used for Canadian tax processing.

Borrow/Loan. The temporary reassignment of an employee to other task reporting or compensation requirements to allow the business to meet unexpected, short-term, fluctuations in staffing or work load. Typically, this kind of reassignment is done informally at a local level, where HR isn't involved and a new job record isn't created. Companies may have specific rules about how long an employee may be borrowed/loaned, how and where productive, non-productive, and compensated absence time will be charged, and what business rules to apply to the borrowed employee's time for the purpose of compensation and benefit entitlement and administration. See also Casual work Assignment.

Bracket. Brackets are a way to look up and retrieve database table values. After you've defined a table, the system finds a corresponding row on that table and returns the value of the bracket. The result is then available for use in other items such as formulas.

Branch Of Military Service. Identifies, if any, military service in which the employee served.

Break in Service. A period of time for which an employee does not meet stated service requirements.

Break Price. The price used to determine which options are eligible for repricing. For example, if the break price is $36, then all outstanding option with a grant price of $36 and greater are eligible for repricing.

Break Punch. An in/out punch of when a time reporter takes a break.

Brokers are individuals or organizations who buy and sell securities. Often they are account executives who work for firms registered with the Stock Exchanges and the SEC. Unlike Transfer Agents, (who are not responsible for sales) Brokers do not maintain records on all your company's certificates. They maintain only sales records and stocks for their clients.

Budget Category. Numeric/alpha identification given to each category of positions.

Budget Period. The period in which you define plans to meet your organizations training requirements.

C

Cafeteria-Style Benefits. Any programs offering several benefit plans from which participants make elections. Cafeteria-style benefits may or may not include flexible credits.
Calculation. In PeopleSoft Pension Administration, the determination of a participant's pension benefit.
Calculation Rule. Criteria for calculating benefits, including as-of dates for age, service, premium, and coverage calculations; rounding rules; and minimum and maximum coverage amounts. Any number of program and plan combinations can use a single set of calculation rules.
Calculation Rule [Global Payroll]. Any rule you develop using combinations of elements to command the system to perform a type of calculation.
Calendar Group ID. Allows you to group together multiple Calendars that you want to run together at the same time. It also controls the order in which the Calendars are processed. You can only group calendars together that are for the same country (based on pay entity country).

Calendar Scope. A time period type (Day-Factored, Month-Factored, or Week-Factored) for use in building your time period calendar.
Canada Academic Teaching Surveys. Statistics Canada requires that all Canadian universities (all degree granting institutions) produce full-time and part-time *Canada Academic Teaching Surveys*. These reports are a legislative requirement. PeopleSoft HRMS 8 provides you with the functionality to code HRMS information using Statistics Canada codes and create both the full-time and part-time Academic Teaching Surveys.
Canadian Industrial Sector. The Canadian industrial classification code with which employees are associated for Canadian employment equity reporting purposes.
Canadian National Occupational Classification (NOC) Codes. NOC codes are occupational classification codes for Canadian companies provided by the government.
Canadian Standard Occupational Classification (SOC) Codes. SOC codes are occupational classification codes for Canadian companies provided by the government.
Cancellation. In the context of an employee stock plan, a transaction (usually triggered by a specific event, such as a termination of employment) in which outstanding securities are declared void and inactive and returned to the pool of securities reserved for issuance under the plan or retired.
Capital Gain. The difference between an asset's purchase price and selling price, when the difference is positive. Capital gains can be either short-term (where the capital asset was held for 12 months or less) or long-term (where the capital asset was held for 12 months or more).
Capital Gains Tax. A tax on profits from appreciation in owned real property, recognized at the time the property is sold; real property includes owned company shares.
Capitalization. The total types and amount of the outstanding securities that have been issued by a corporation. Generally includes both equity and debt securities.
Carry-Forward. Residual contributions that remain in a stock purchase participant's account after the purchase of shares that are used toward future purchases.
Case Officer. In Germany employees in your company are designated as Case Officers, and have responsibilities for handling health and safety incidents.
Cash Balance Accounts. The PeopleSoft Pension Administration function that tracks the activity in an employee's hypothetical account under a cash balance plan.
Cash Balance Plan. A defined benefit plan designed to look like a defined contributory plan. The plan periodically credits a percentage of pay to each employee's hypothetical account.

Cash Exercise. At the time of exercise, the optionee is required to pay in cash the total option price plus any withholding taxes due to the company.

Casual Work Assignment. The temporary assignment of an employee to a work position or location to meet the needs of the business. Typically, there is no Human Resource activity to support the work assignment (that is, a new Job record is NOT created). Often compensation rules that accrue to the temporary assignment override the compensation rules that apply to the employee's normal work assignment. See also Borrow/Loan.

Catalog. A way of organizing your training courses into classifications for increased flexibility. Catalogs consist of categories and subcategories.

Category. Categories are the primary level of a two-tier structure of training courses. Categories can consist of subcategories that provide further course definition.

Census Metropolitan Area (CMA) Code. In Canada this code is prescribed by the government and refers to the area of an urbanized core with a population of at least 100,000.

Central Personnel Data File (CPDF). Two types of reporting made by agencies to the OPM include the Dynamic and Status files (quarterly and monthly, respectively) covering a range of employee personnel/payroll data.

Certain and Continuous Payment Option. A form of pension payment where the benefit is paid out for the lifetime of the participant with a specified number of payments guaranteed so that a beneficiary will receive payments until the end of the guarantee period if the employee dies before the guaranteed payments are complete. For example, under a ten-year certain and continuous payment option, a retiree who lives less than ten years receives payments until death, then the retiree's beneficiary continues to receive payments for the remainder of the ten year period. A retiree who lives longer than ten years continues receiving payments after the ten year period until death. Also knows as a "Term Certain and Continuous" payment option.

Certain Only Payment Option. A form of pension payment where the benefit is paid out entirely over a specified period of time—usually five, ten, or fifteen years—with no ongoing payments after the specified period. If the retiree dies before payment period is over, the remaining payments are made to a beneficiary. Also known as a "Term Certain" payment option.

Change To Lower Grade.

- For positions under the General Schedule or under the same wage grade schedule, a change-to-lower grade changes the employee to a lower grade; and
- When both the old and new positions are under the same type ungraded wage schedule, or in different pay-method categories, a change-to-lower grade changes the employee to a position with a lower rate of basic pay.

Child. A node or detail of a tree linked to another, higher-level node referred to as the parent. Child nodes can be rolled up into their parent. A node can be a child and a parent at the same time depending on its location within the tree.

Citizenship Code. Numeric indicator as to whether the employee is a U.S. citizen or a foreign national serving in the U.S. The codes are:

- Citizen
- Other.

Civil Service Retirement System (CSRS). A retirement plan available to employees of the federal government. CSRS covers all employees appointed to a position in the federal government before January 1, 1984. Coverage includes a basic annuity plan with employee contributions and the Medicare Hospital Insurance component (1.45%) of the Social Security tax.

Clock Hour Reporting. Method of reporting time by recording actual times in and out (start and stop) (see Time Reporting)

Cloning. The process that enables you to copy run controls to create employee schedules from existing Run Control ID's that have already been executed and saved.
Close Date. The date in which time entry is no longer allowed for a given pay period. Defined as an offset number of days to the pay period end date.
Close Date [Time and Labor]. On the Pay Calendar Table, the Pay Period Close Date is the date beyond which a Time and Labor period is no longer "current". Time and Labor uses the Pay Period Close Date to determine if the time being reported is for the "current" pay period.
Close Price. The price of the final trade for a security at the end of the trading day.
COBRA (Consolidated Omnibus Budget Reconciliation Act). Legislation that requires employers to offer continued health care coverage to employees and their dependents who lose benefits coverage under certain defined conditions such as voluntary termination, divorce, becoming an overage dependent, or retirement. Any individual, whether employee or dependent, who is covered under a health plan at the time of a qualifying event, has the option to elect COBRA coverage.
Combined Federal Campaign (CFC). A vehicle used by federal employees to contribute to a charity or charities of their choice.
Commercial-Off-The-Shelf (COTS). Equipment or software that is currently sold commercially to at least one customer.
Commission Tax Method. A payroll tax calculation method that adds year-to-date earnings to earnings for this pay period and finds the annualized gross by multiplying by the number of pay periods in the year; the gross is then divided by the number of tax periods specified on the paysheet. This method is used for Canadian processing only.
Common Shares Issued and Outstanding. Represents the residual ownership interests in the corporation. This is the composite number of shares available and tradable on the open market.
Community Background. In the United Kingdom Community Background refers to the religious category, such as Catholic or Protestant, of employees, job applicants or appointees. See the Northern Ireland Report for more information.
Compensation. The process by which a worker is remunerated for services rendered to, or work performed on behalf of a business entity.
Compensation Package. All of the base and non-base components on a job row.
Compensation Rules. Business methodology or logical process that is applied to reported time in order to determine payable time (see Time Administration)
Comp time (compensatory time). A PeopleSoft Time and Labor-managed employee benefit where time off is granted in exchange for time worked based on customer-defined criteria; is associated with an expiration and is used as reported time (see Attendance)
Competitive Appointment. An appointment to a position in the competitive service following open competitive examination or under direct-hire authority. The competitive examination, that is open to all applicants, may consist of a written test, an evaluation of an applicant's education and experience, and/or an evaluation of other attributes necessary for successful performance in the position to be filled.
Competitive Service. All positions as defined by 5 USC 2102 in the executive branch of the Federal Government are in the competitive service unless they are specifically excluded from it. Positions in the legislative and judicial branches are outside of the competitive service unless they are specifically included.
Computer Aided Software Engineering (CASE). A set of tools to help application developers complete software development or modification more quickly and accurately.
Concurrent Offerings. Multiple stock purchase offerings that are active and outstanding at the same time. The end date is measured from the employee's grant date.
Concurrent Processing. The situation in which you run multiple batch processes at a time. In PeopleSoft Benefits Administration, for example, simultaneous open enrollment and event maintenance qualifies as concurrent processing.

Consolidations. The PeopleSoft Pension Administration functions that accumulate hours, earnings, and pension contributions based on payroll data.

Contingent Beneficiary. In PeopleSoft Pension Administration, any non-spouse pension beneficiary, including a child, other relative, or a trust. Spousal consent is required in order for an employee to name a contingent beneficiary.

Contracting Officer (CO). Individual who has the authority and the official responsibility to produce a sound acquisition document.

Contracting Officer's Technical Representative (COTR). Individual responsible for monitoring a contract and its associated tasks and deliverables.

Contractor. Any individual or non-employee reporting time that will not be paid through the payroll system

Contribution. Represents money a stock purchase participant elects to contribute to the plan. Contributions are deducted from the participant's paycheck and used to purchase stock pursuant to the offering and purchase period they are enrolled.

Contributory Plan. A Pension plan to which employees contribute. Contributions are typically a percentage of pay deducted from the employees' paychecks.

Control Number. A sequential identifying number used to identify an exercise.

Core Functionality. Core functionality is the set of information in PeopleSoft HRMS that is common to all of your global workforce tracking needs—and is always displayed on the primary page.

Core hours. The hours a workday, workweek or pay period in which a time reporter must be present for work in a flexible work schedule (see Scheduling)

Corporate Reporting. Companies with more than $10 million in assets whose securities are held by more than 500 owners must file annual and other periodic reports. Publicly held companies are required to file documents with the SEC which include:

- Registration statements for newly-offered securities
- Annual and quarterly filings (Forms 10-K and 10-Q)
- Proxy materials sent to shareholders before an annual meeting
- Annual reports to shareholders
- Documents concerning tender offers (a tender offer is an offer to buy a large number of shares of a corporation, usually at a premium above the current market price)
- Filings related to mergers and acquisitions

Corporate Repurchase. When a corporation elects to repurchase some of it's own securities. This reduces the Common Shares Issued and Outstanding. Typically, used to improve the valuation of the company's common securities outstanding as well as the Earnings Per Share (EPS).

Correction to IRR. An IRR type used when corrections need to be made to an original IRR that has already been submitted to the Office of Personnel Management (OPM). Federal employees covered by the CSRS retirement plan require SF-2806-1. Federal employees covered by the FERS retirement plan require SF-3101. A Correction IRR is also used if original retirement deductions were over-reported. See also Individual Retirement Record (IRR).

Cost Accounting. A method where business costs are accumulated and distributed to products, processes, or discrete undertakings on an equitable basis. There are a variety of cost accounting methods, but they all share the same basic functions. classifying costs, recording costs, allocating costs to products or activities, summarizing and reporting costs to management. Cost accounting requirements and financial accounting requirements are not necessarily synonymous.

Cost Basis. Typically, this refers to the original price of an asset used in determining capital gains. However, in the case of death of an optionee, the appraised value of the asset at the time of death is the cost basis.

Cost Center. A Time and Labor Business Unit, in which all related costs attributable to some center within a business (such as an activity, an organization, or a program), are segregated for accounting or reimbursement purposes.

Cost Of Living Allowance (COLA), Non-Foreign. A cost-of-living allowance payable to an employee at a location in a non-foreign area where living costs are substantially higher than those in the Washington, DC area.

Counts. Count elements allow you to count the number of days or hours from a specific period of time. Counts are used primarily during proration calculations, but can potentially be utilized in other situations as well.

Court-Ordered Benefits Coverage. As prescribed in Title 5, United States Code and Title 5, Code of Federal Regulations, court orders that stipulate that an employee must continue or begin the coverage features for all employee benefits must be enforced. Federal employees are mandated by court orders to continue covering or begin covering their former spouses and/or children under their federal employee benefit programs (health, life, and thrift savings).

Court-Ordered Garnishments. As prescribed in Title 5, United States Code and Title 5, Code of Federal Regulations, court orders enforcing child support, alimony, or collection of commercial indebtedness are served on the appropriate entity within the Federal agency and implemented as offsets against the employee's salary.

Coverage. An employee’s chosen benefit plan and coverage level; that is, what sort of benefit is provided as well as the value.

CPAM (Caisse Primaire d'Assurance Maladie). In France, CPAMs are the local social security offices that manage health coverage for French workers. CPAMs are regulated and established by the French government. If you’re managing a French workforce you’ll need to identify and track the CPAM offices that impact your enterprise.

CRAM (Caisse Régionale d'Assurance Maladie). In France the CRAM is the regional social security body which oversees the running of CPAMs. CRAM offices work with companies to both prevent and compensate workers for industrial injury.

Created Time. Time collecting device time or elapsed time generated by the system based on the time reporter’s schedule (see Time Administration)

Creating Time. The preliminary generation of time segments as close as possible to their likely values when you officially report time—so that the information on the time records is as fresh and current as possible. The system shows you time that has already been created, rather than you having to create it “on the fly” when you come in to report. The process fills in reporting day gaps as defined by work schedules.

Credits. See Flexible Credits.

Crew Reporting. A Time and Labor process that enables you to report the earnings which consist of one or several time reporting codes and associated quantities of hours, amounts, or units, and task information for one date under report for a user-defined crew. The system transforms the information into instances of daily time for each crew member for the entered date.

Cross Border Walker. This term is used in Europe for an employee who lives near a border in one country and works in another country. Such employees are subject to different tax and social security rules.

Cross-Plan Validation. The process by which the PeopleSoft Benefits Administration determines enrollment prerequisites for benefit plans. You can define four types of cross-plan validation prerequisites: prerequisites based on plan types, benefit plans, dependent enrollments, and coverage percentage limits for Life and AD/D plans.

Cumulative Tax Method. A payroll tax calculation method that adds together year-to-date earnings and earnings for the current pay period, then annualizes the result before calculating tax. This method is useful when Payrolls vary greatly in amounts from pay period to pay period, such as in the case of sales commissions.
Current Period. The earliest pay period for which the close date has not passed (see Time Reporting).
Current Period [Time and Labor]. In Time and Labor, the employee's current pay period which will be determined via the employee's Pay Group affiliation. Although there can be only one definition of Current Period per installation, the user can change it manually.
Current View. A reporting screen in Time and Labor whose effective date is within the date boundaries of an employee's current pay period, and for which pay has not yet been confirmed. A ***Future Time Reporting Transaction*** is one that has an effective date after the last day of the employee's current pay period. An ***Historical Time Reporting Transaction*** is one that has an effective date before the first day of the employee's current pay period.
Current Year. A period for event maintenance processing.
CUSIP Number. A nine digit alphanumeric number associated with issuers' securities. CUSIP (Committee on Uniform Securities Identification Procedures). A uniform numbering system widely used to identify specific securities and their issuers.
Custom Statement. A user-created logical or mathematical expression that determines information about an employee in PeopleSoft Pension Administration. Custom Statements commonly define employee groups and benefit formulas.
Cut Session. Cut sessions are a means of dividing a course session. You use cut sessions where a course session does not run on consecutive days from start to finish, or if there are multiple instructors or locations. Each cut session has it's own start/end date, location, and instructor. For example, if you have a course that runs for two days a week for a month, you would divide the course session into four cut sessions, each of which is two days long.

D

Data Extract. A report that creates a file used to transmit data to a third party on magnetic media. There is no meaningful printed output for this type of report.
Data Mart. A database containing data summarized from one or more transactional systems, optimized to support the business analysis needs of a particular department, such as Sales, Finance, or Marketing. Users analyze the data using OLAP tools and ad hoc query/reporting tools. The data mart can be a relational database or a multidimensional database, and its data can come directly from transactional systems or from a data warehouse.
Data Row. Contains the entries for each field in a table. To identify each data row uniquely, the system uses a key consisting of one or more fields in the table.
Data Warehouse. A large database containing data summarized from one or more transactional systems, optimized to support the analysis needs of the enterprise. An ideal data warehouse contains all the data necessary to make business decisions. Users analyze the data in the warehouse using OLAP tools and ad hoc query/reporting tools.
Database Alias. The PeopleSoft Pension Administration utility that looks up employee data.
Date. If you want to either include a date in a calculation, or determine a new date by taking a starting date and either adding or subtracting a period of time to come up with another date, you use a date element.
Date Classified. Date the Position Description is approved by Management/Position Management.
Date Eligible To Retire. Date an employee is eligible to optionally retire based on the combination of age and service that meets legal requirements.

Date Under Report. The date (day) in PeopleSoft Time and Labor for which time is being reported. The Date Under Report does not have to equal today's date.
Day Breaker. Customer defined time that is used to determine when one day becomes the next. It's used to determine the "logical" date of a punch. (See Understanding Workgroups)
Death Coverage. The PeopleSoft Pension Administration function that determines the factor used to reduce an employee's benefit when the plan charges for PRSA coverage.
Deduction. Any amount taken from an employee's pay check each pay period. Deductions may include health or medical benefits, union dues, and so on. See also Benefit Deduction and General Deduction.
Deduction Subset. A group of deductions selected from a company's standard set of deductions. Deduction subsets minimize data entry time in special processing situations such as bonus check runs.
Deferred Compensation. Compensation payments that are payable to an individual in the future such as pension plan payments, annuities, stock awards and profit sharing. Note: Profit sharing can be considered direct pay if paid out in cash on a periodic basis or deferred pay if cumulative with the intention of payment in the long-term future.
Deferred Vesting. The adjustment made to the original option's vesting schedule that pushes the vesting into the future.
Defined Benefit Plan (DB Plan). A retirement income plan (usually called a pension plan) where the employee's benefit is definitely determinable based on a plan-specified benefit formula.
Definition or **Function Definition.** The parameters for any of PeopleSoft Pension Administration's nineteen core functions. A definition has to be explicitly associated with an employee Group Definition before it can be applied.
Delta. When retroactive processing occurs for a given payee, the system recalculates each element generated for the payee. The system compares the recalculated results to the original results. The difference between these results is typically referred to as the retro "delta." A retro delta can represent either an underpayment or an overpayment that results in an adjustment to the payee's earnings.
Demand. Collection of training requests. This could be an employee demand, a departmental one or a company-wide demand.
Detail Tree. A tree which employs ranges of detail values under each node; you must manually specify the detail values.
Detail. A temporary assignment to a different position for a specified period when the employee is expected to return to his/her regular duties at the end of the assignment. This employee is considered for pay and strength count purposes to be permanently occupying his/her regular position. Unless the agency chooses to use an SF50, a detail is documented with an SF52.
Direct Compensation. Cash payments made to workers in exchange for their contributions to the organization. Direct pay is typically categorized as fixed pay (for example, base pay, shift differentials) and variable pay (for example, profit sharing, incentive, bonus). Note: Profit sharing can be considered direct pay if paid out in cash on a periodic basis or deferred pay if cumulative with the intention of payment in the long-term future.
Director. An affiliate of the company who holds a seat on the Board of Directors for the corporation. A Director, generally, is not an employee of the corporation.
Disability and Discrimination Act of 1995. In the United Kingdom this act makes it unlawful to discriminate against individuals on the basis of their disability in relation to recruitment, promotion, training, benefits, terms and conditions of employment, and dismissal.
Disability Rate Code. The desired percentage of disabled persons that should be employed by French employers, as mandated by the French government.
Discounted stock option. Rights to a stock option at a price less than 100 percent of fair market value at the time of grant.

Disqualifying Disposition (DD). When an optionee sells or otherwise disposes of the shares of stock acquired through the exercise of an incentive stock option or through an employee stock purchase plan before the holding period for preferential tax treatment has lapsed.

In the case of Incentive Stock Options, the holding period is one year of the date of exercise and two years of the date of grant. At the time of disposition, the individual recognizes compensation income equal to the difference, if any, between the option price and the fair market value of the corporation's stock on the date of exercise. If the sale price is less than the fair market value of the stock on the date of exercise, the compensation income is limited to the total sales price less the total option price, less any fees.

In the case of purchases through an employee stock purchase plan, the holding period is one year from the purchase date and two years from the enrollment date. Compensation income in a disqualifying disposition is equal to the difference between the total fair market value on the purchase date and the total purchase price.

Distribution. Provide a repository of time and associated estimated and actual allocated labor costs to other systems

Dividend. Distribution of earnings back to shareholders, prorated by the class of security and paid typically in the form of money or stock. The amount of a dividend is decided by the Board of Directors and is usually paid quarterly.

Domestic Relations Order (DRO). A preliminary version of a court order (usually stemming from a divorce settlement) ordering a division of a participant's pension benefits. The order is not in effect until it is determined to be "qualified" by virtue of meeting certain requirement. At that point it becomes a Qualified Domestic Relations Order, or QDRO.

Double Byte Characters. If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].

Drill Down. The ability to go down to the next level of detail in a set of data. For instance, if you're looking at an expense figure for a division, you can drill down to the expenses for each department in the division.

Drilldown. The act of moving from the general to the specific. By drilling down you can examine the data underlying any summarized form of information in your PeopleSoft system. You can also drill down from one PeopleSoft system to other systems from which information was received.

DRO. See Domestic Relations Order.

DSS (Decision Support System). A DSS is a workstation-based analysis and reporting system, typically aimed at analysts and line managers. OLAP tools provide a powerful DSS.

Duration. In PeopleSoft Pension Administration, the utility that calculates the length of time between two dates.

Duration [Global Payroll]. An element type that calculates a period of time between two dates. For example, if you want to determine a payee's age, you can calculate the duration between his birth date and the calendar period end date.

Dynamic Group. A group in Time and Labor that enables you to establish criteria or attributes for a group of employees. All employees who fit this criteria at processing time belong to the group.

Dynamic Tree. A tree which takes its detail values—***Dynamic Details***—directly from a table in the database, rather than from a range of values entered by the user.

E

Early Retirement Date (ERD). A retirement date earlier than a plan-specified "normal" retirement date. Employees usually must meet age and/or service requirements to be eligible for early retirement, and early retirement benefits are often reduced to compensate for the longer duration of payments.

Early Retirement Factor. The reduction made to an employee's benefit if the employee elects for early retirement.

Early/Late Adjustments. The PeopleSoft Pension Administration function that calculates early retirement factors or late retirement factors.

Earliest Change Date. Determines both the range of dates and the amount of data that will be processed for each time reporter (see Batch Processing)

Early Punch. A punch that is more than the predefined number of hours/minutes before a scheduled punch where a time reporter is warned

Earnings. The amount owed to an employee based on salary, hours worked, or other calculation routines, plus other types of compensation and holiday, vacation, and bonus pay.

Earnings [Global Payroll]. An element type that defines the different types of compensation that are added to a person's pay. Examples include salary, commission, bonuses, and retirement pay.

Earnings Accrual Class. Categorizes a set of accruable earnings.

Earnings Code. Codes that represent the various types of earnings such as regular, overtime or leave.

Earnings Per Share (EPS). The portion of a company's profit allocated to each outstanding share of common stock. Net income (reported or estimated) for a period of time is divided by the total number of shares outstanding during that period.

Earnings Type. An abbreviated and encrypted set of business instructions containing compensation instructions. Earnings Type may also contain Benefit Entitlement and Administration instructions, taxation instructions, Financial Accounting instructions, Organizational Administration instructions, work group and labor affiliation instructions, and other instructions.

EDGAR (Electronic Data Gathering, Analysis, and Retrieval). An electronic system implemented by the SEC that enables companies to file documents in conjunction with disclosure requirements mandated by the SEC.

EEO Company Code. In the United States companies are assigned this federal code for EE0 and VETS100 reporting.

Effective Date. A method of dating information in your system. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. The Effective Date usually defaults to your system's current date.

Effective Tax Rate. The ratio of income tax paid over gross income, showing the percentage of income actually paid in taxes.

EIS (Executive Information System). An EIS is a workstation-based analysis and reporting system for executives. An EIS provides a higher-level view of the data than a DSS, and typically requires less knowledge about the underlying transactional systems. OLAP tools provide a powerful EIS.

Elapsed Schedule. A method of scheduling a time reporter's time that is based on TRC and duration. This method can be used for scheduling of elapsed time reporters (see Scheduling)

Elapsed Time. Reporting non-clock time in increments of hours or partial hours (see Managing Time / Understanding Time Reporting)

Elapsed Time Service. A method of calculating a period of service that uses only the start and end dates of the period to determine the amount of service. Hours worked or other measures of the actual work performed during the period are not taken into account.

Electronic Certification System (ECS). An automated Payment Voucher authorized by the Certifying Officer for use within the Treasury Department, Financial Management Service's financial system. PeopleSoft provides a method to record and generate data files for on- and off-cycle processed payments.

Electronic Data Interchange (EDI). In Canada some provincial Workers Compensation Board jurisdictions allow for health and safety incident report submission by electronic media, such as email.

Element. In PeopleSoft Global Payroll, an element refers to both primary elements and supporting elements. Primary elements are comprised of earnings, deductions, absence entitlements, and absence take elements. Supporting elements are element components that are combined to create primary elements.

Element Group. Element Group identifies a group of elements to provide eligibility. You can then use this as a notational shortcut—instead of having to list each element, you can use the element group name. Element Group's expedite the process of manipulating earnings and deductions.

Element Name. Name assigned by the user for data fields, rules, formulas, and tables. For example, the names you give to new rules, elements, or objects.

Element Segment. When an element changes mid-period, requiring the affected element (and perhaps a subset of other elements) to be calculated multiple times on either side of the date on which the change takes place, element segmentation is used. Unlike period segmentation, the system segments only the elements you select, and creates separate result columns only for the specified elements. In element segmentation, there is only one gross-to-net result set.

Eligibility Group. Eligibility groups define the possible earnings, deduction, absence entitlement, and absence take elements that a payee might be eligible to receive. This enables you to group payees so as to assign eligibility for certain pay elements.

Eligibility Rule. PeopleSoft Benefits Administration uses eligibility rules during Benefits Administration processing to determine which benefit programs and options an employee is eligible for. Eligibility rules are closely associated with event rules: they determine what options an employee can ***have,*** while event rules determine which of those options an employee will actually be able to ***choose.***

Employee. An individual employed by an organization and administered as an employee in the PeopleSoft Human Resources system.

Employee Accounts. The PeopleSoft Pension Administration function that tracks employee contributions to a pension plan.

Employee Paid Benefit. The portion of a pension benefit funded by the employee's own contributions to the pension plan. Also, the PeopleSoft Pension Administration function that determines this amount.

Employee Stock Purchase Plan. A type of statutory stock option plan through which employers grant options to their employees in order to provide them with additional forms of compensation.

Employee Survey Report. The Employee Survey Report is an annual regulatory report that the French government requires from employers with more than 200 employees. In French it is called "Le Bilan Social". The report is communicated to both labor unions and the government. It provides a snapshot view of the company over the past 3 years for about 200 indicators.

Employee Training Cost. Amount budgeted to pay for students' salaries while on training courses.

Employer Identification Number (EIN). In the United States a company is typically defined as a business enterprise that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

Employer's Liability Insurance Associations (Berufsgenossenschaften). Social Insurance in Germany is maintained and administered by private organizations that act as employer's liability insurance associations. Employers pay out premiums to these associations, who administer and pay out funds to workers who are injured on the job.

Employment Cost Index (ECI) Adjustment. Annual increase to wages established/permitted by statute.

Employment Equity Computerized Reporting System (EECRS). Canadian companies are required to report to the Federal Government on employment equity. PeopleSoft Human Resources contains the Canadian Employment Equity report (PER101CN), which creates a data interface file to the federal government's Employment Equity Computerized Reporting System (EECRS).

Encumbrance. A claim against funds. It is a projection of future expenses based on the situation, as we know it today. Encumbering funds is not the same as spending them or even guaranteeing that you will spend them. It just means that if the situation as it exists today does not change, you will spend all of those funds by the end of the fiscal year.

Enterprise. In PeopleSoft Time and Labor, all of the business units of the installation site.

Entry On Duty Date (EOD). Date that indicates when an employee started to work at his/her current agency.

Equal Employment Opportunity Act (EEO). Legislation which requires United States employers to provide equal employment opportunity to all persons regardless of ethnicity, gender or age.

Equal Employment Opportunity Commission (EEOC). In the United States the EEOC requires that most companies file one or more reports from a series named EEO-1 through EEO-9. These reports include counts by federal employment categories of male and female employees in certain ethnic groups.

ERISA (Employee Retirement Income Security Act of 1974). The U.S. Federal legislation enacted to prevent abuses of employee pension rights by employers.

Estimated Gross. Estimated labor cost associated with reported time (see Managing Time, Understanding time Reporting Codes)

Ethnic Code. The Federal Office of Management and Budget (OMB) racial and ethnic census categories used for classifying individuals in U.S. Government reports.

EU. This acronym stands for the European Union.

Event. Occurrence or happening

Event Class. An event or type of event that results in a change of benefits eligibility for an employee or dependent. Event classes are prominently used in COBRA and Benefits Administration processing.

Event Maintenance. The process that enables you to manage ongoing enrollments during a plan year. Changes involving maintenance include new hires and re-hires, terminations, family status changes, and changes to benefits eligibility.

Event Rule. Used by PeopleSoft Benefits Administration to determine how events are processed by the system. Event rules look at the benefit plan options an employee is eligible for and determine which options the employee can actually ***choose.*** Event rules are closely associated with eligibility rules but it is important to note that they are not the same. Event rules ***should not*** be used to determine eligibility.

Event Trigger. You use triggers to tell the system that when a change takes place to certain data (an event), it should perform an action automatically. When the event occurs, the system writes a line to a trigger table. Then when it's time for the action, the system reads the data from the trigger table and performs the appropriate action.

Excepted Service. As defined by 5 USC 2103, the Excepted Service consists of those civil service positions that are not in the competitive service or Senior Executive Service.

Exception. User or system delivered, defined conditions applied to scheduled, reported or payable time that require audit or review (see Time Management)

Exception Rules. A rule (s) that is applied to scheduled, reported time, and payable time in order to determine conditions which require audit or review (see Time Administration)

Exception Severity. The degree of importance associated with an exception. For example, in exception which is a result of an employee clocking in late may have a ***Medium*** severity, while an exception which is a result of an employee not clocking in has a ***High*** severity (see Time Management)

Exception Time Reporting. A method of time reporting where only differences to the schedule are provided (see Time Reporting)

Excess Plan. A pension plan where the benefit formula provides an increased benefit for Final Average Earnings above a specified integration level. This compensates for the fact that Social Security benefits are based only on earnings up to a specified maximum.

Executive Schedule (EX). Compensation and pay plan used by the Executive Branch of the federal government. Statutory pay limits are derived from several of the pay levels within this plan and imposed on the General Schedule and other existing pay plans throughout the Federal government.

Exercisable. The option shares that are available to the optionee to exercise

Exercise Date. The date on which an individual purchases underlying shares from and option grant or transacts a simultaneous purchase and sale of underlying option shares through a cashless exercise and collects option profit in cash or shares.

Exercise Price. The price per share required to exercise a stock option.

Exercise Proceeds. Cash, stock or other recognition received by a company as a result of option exercises, including cash or stock paid by individuals to exercise options and cash company tax savings from deducting non-statutory option profits at exercise.

Exercise. The transaction in which an individual purchases or "exercises" the right to purchase the option shares. The IRS refers to the purchase of company stock in an employee stock purchase plan as an exercise.

Expiration. The process by which the outstanding shares of an option cease to be exercisable, generally at the end of the option term. The length of the option term and the date of expiration are established in the Grant Agreement.

Expiration Date. The last day of an option term in which the option is canceled and no longer exercisable.

Expiration Grace Period. When you enter a stock action allows the exercise of the already vested shares as of the action date, the system will calculate the date these shares expire based on the grace period defined on the Stock Action Rules page for that stock action. The system will automatically cancel vested shares not exercised at the end of the expiration grace period.

External Scheme. In the United Kingdom an External Scheme is a vocational training, education and job placement program involving an employee, an employer and the government.

Extra Time. Any hours worked outside of an employee's normal (scheduled/shift) hours or days. Extra time may be scheduled in advance of when it is worked, and may be subject to special compensation rules. It may be treated differently than standard time for purposes of Benefit Entitlement and Administration.

Extrinsic Rewards. Tangible rewards that can be given to the individual. Typically categorized as financial and non-financial rewards. Financial rewards would include direct compensation, indirect compensation and deferred compensation. Non-financial rewards are provided to the individually and viewed as a benefit by the individual based on the culture of the organization such as the size or location of one's office.

F

Fair Labor Standards Act (FLSA). A federal regulation governing several time and labor issues. ***FLSA Overtime*** requires that all nonexempt employees be paid at a rate of time-and-one-half for all hours over 40 physically worked during a workweek. This requirement may be superseded by state or local laws when the lesser law is to the greater benefit of the employee, or by union contract. An ***FSLA Workweek*** is a permanently established, regular workweek for a group of employees.

Fair Market Value (FMV). The price of a company stock based on the current market value as determined by supply and demand, or a valuation method. The stock market sets the fair market value for a public company. For a private company the fair market value is more subjective, but typically determined by financial factors or set by an outside valuation company.

Fair Market Value Tracking Methods. Methods used to track and report trading activity on various exchanges (i.e. NYSE, AMEX, NASDAQ, etc…).

Family Medical Leave Act (FMLA). A federal regulation that protects health benefits and job restoration for employees who must take a leave from work to care for themselves or family members. FMLA regulations contain provisions regarding employer coverage, employee eligibility and entitlement, notice and certification, continuation of health benefits, and job restoration. PeopleSoft Benefits applications offer FMLA Plans that help employers and employees determine FMLA eligibility and schedule and track FMLA leave requests.

Federal Employee Group Life Insurance Program (FEGLI). Generally, if the employee has Federal retirement coverage or is on a temporary appointment exceeding one year, he/she is eligible to participate in the FEGLI program. Once eligible, he/she is covered automatically for Basic Life Insurance and premiums will be deducted from gross salary unless coverage is waived within the first period of eligibility. The program offers Basic Insurance coverage and three types of optional coverage: Option A (Standard), Option B (Additional), and Option C (Family).

Federal Employee Pay Comparability Act (FEPCA). This law provides a structure and methodology to determine and authorize locality-based pay adjustments to Federal employees in order to elevate their basic pay to be commensurate with private sector employees working in the same occupations in the same geographic localities. It also includes a feature to authorize agencies to make advance salary payments to attract candidates for open positions which have consistently been hard-to-fill in certain geographic areas.

Federal Employees' Compensation Act (FECA). This law provides compensation and medical benefits to civilian employees of the United States for disability due to personal injury or disease sustained while in the performance of duty. A feature of this law provides for the continuation of pay (COP) without charge to leave for up to 45 calendar days due to disability and/or medical treatment following a traumatic injury. Employees file claims with the U.S. Department of Labor, Office of Worker's Compensation, which adjudicates the claims and compensates the employing agencies for the employee's pay and benefits during the claim period.

Federal Employees Health Benefits (FEHB). Generally, the employee is entitled to coverage by the FEHB program if appointed to a position with Federal retirement coverage or has been on the rolls on a temporary appointment for more than one year. The Federal employer shares the cost of the premium (about 75%); actual premiums depend on the plan selected. If under a temporary appointment, the employee pays both the employer and employee shares. If the position is part-time, the employee pays the employee share and a portion of the employer's share.

Federal Employees Retirement System (FERS). A retirement plan available to employees of the federal government. FERS covers all employees appointed to a position in the federal government after January 1, 1987. Coverage includes Social Security, a basic annuity plan, and a TSP.

Federal Employer Identification Number (EIN). Used to identify the tax accounts of businesses. Businesses, which have employees or operate business as a partnership or corporation, must obtain an EIN.

Federal Holidays. The following ten holidays are observed as non-work days; without loss to pay or charge to leave:

- New Year's Day - January 1

- Martin Luther King's Birthday - Third Monday in January
- President's Day - Third Monday in February
- Memorial Day - last Monday in May
- Independence Day - July 4
- Labor Day - First Monday in September
- Columbus Day - Second Monday in October
- Veterans Day - November 11
- Thanksgiving Day - Fourth Thursday in November
- Christmas Day - December 25

Federal Insurance Compensation Act (FICA). Employee and employer contributions to Social Security.

Federal Reserve Transit Number. A unique identifier for U.S.-based banks, allowing banks to transfer funds within the Federal Reserve system.

FEGLI Living Benefits Act. Beginning 7/25/95, a Federal employee who is terminally ill may elect to receive a lump-sum payment equal to the full amount of basic life insurance only, or a limited portion designated in multiples of $1000. An election to receive this benefit is irrevocable; the individual is considered terminally ill if his /her life expectancy is 9 months or less.

FICA (Federal Insurance Contributions Act). FICA consists of both a Social Security (retirement) payroll tax and a Medicare (hospital insurance) tax. The tax is levied on employers, employees, and certain self-employed individuals.

FIFO (First In First Out). Method used by companies to record Disqualifying Disposition Income. If a company uses this method they record the optionees disposition of shares by attributing the shares to the earliest exercise, purchase or release dates for which shares remain available for sale.

Fill-In Employment. Employment held by persons during the time period after leaving their regular occupation in anticipation of, but before entering, military service.

Fictitious Calculations. Fictitious calculation rules perform temporary calculations. A fictitious calculation is a sub-calculation run during a normal calculation to determine a net that would have been computed if certain parameters were used. This result is then used for further processing in the normal calculation. A fictitious calculation is always started from inside a normal calculation, run for one payee, and run for a specified set of periods.

Final Average Earnings (FAE). The PeopleSoft Pension Administration function that averages earnings from a specified period of an employee's career. The result is used as a component of the pension benefit formula.

Financial Accounting. The accounting for a business entity's assets, liabilities, revenues, and expenses to determine its net worth and to produce financial statements. Within Generally Accepted Accounting Principles, a business has some latitude as to when and how to record its financial transactions, as long as it continues to meet its legal and regulatory requirements. A business' financial accounting requirements are not necessarily the same as its cost accounting requirements. The one should not be mistaken for the other (i.e. the extent to which a company's financial accounting system meets its cost accounting needs depends on how it has chosen to describe its chart of accounts and the level at which it has chosen to record financial transactions.

Financial Accounting Standards Board (FASB). Government accounting agency headed by the Office of the Chief Accountant that creates the generally accepted accounting principles (GAAP).

Financials. A component of an enterprise application suite, which administers a company's financial accounting requirements.

Fixed Offering. The offering type is fixed when the end date of each offering is the same for all employees regardless of the employee's grant dates.

Fixed Plan. A stock purchase offering period where the ending offering date will be the same as the purchase date. Eligible employees will always purchase stock on the specific purchase dates and by the purchase rules you define.

Flexible Credit. Any credit associated with a given benefits program, plan, or type of coverage. Credits based on an entire program can be applied toward the benefit costs however the employee chooses.

Flexible Hours. Hours during the workday, workweek or pay period during which a time reporter covered by a flexible work schedule may choose to vary his times of arrival and departure from the worksite (see Scheduling)

Flexible Spending Account (FSA). An account to which an employee and (optionally) an employer pledge an annual amount for a plan year. The employee then submits claims for authorized expenses.

Flexible Work Schedule. A method of scheduling a time reporter's time that is based on a range of flex hours of start and stop times and core work hours. This method can be used for scheduling clock and elapsed time reporters (see Scheduling)

FLSA Status. A PeopleSoft Human Resources term that is used to indicate whether a job is exempt or nonexempt according to the Fair Labor Standards Act. All employees associated with a particular job will receive that job's **FLSA Status. FLSA Status** is an eligibility determination factor for PeopleSoft Benefits Administration.

Foreign Education. Education acquired outside of any state of the U.S., the District of Columbia, the Commonwealth of Puerto Rico, a Trust Territory of the Pacific Islands, or any territory or possession of the U.S.

Form 10-K. A form used for annual reports pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934 for which no other form is prescribed.

Form 10-Q. A form used for quarterly reports under Section 13 or 15(d) of the Securities Exchange Act of 1934, filed pursuant to Rules 13a-13 or Rule 15d-13. This report, which public companies are required to file quarterly with the SEC, provides unaudited financial information and other selected material.

Form 5500 Participant Count Extract. A PeopleSoft Pension Administration data extract containing data that a plan administrator needs in order to complete IRS Form 5500, used to report on the number of plan participants.

Form S-8. A form used to register securities offered by a reporting company under its employee benefits plans, including stock option plans. Also called the Registration Statement under the Securities Act of 1933.

Form W-2. A form used by employers to provide workers with a statement of wages, tips and other compensation from the previous year. This form, distributed employees by January 31 of each year, reflects state and federal taxes, social security, Medicare wages, and tips withheld.

Formula. Element which enables you to define your own formulas for use—gives further flexibility to define complex organizational needs.

French Professional Elections. French companies employing a certain number of employees must hold elections for selecting personnel representatives (Délégués du personnel), and members of the Work Council (Comité d'Enterprise).

FTE (Full Time Equivalency). FTE is the percent of full time the employee should normally work in this job. Full time is defined by the Standard Hours specified in either the Salary Plan Table or the Default Standard Hours specified in the Installation Table.
Function. A category of pension calculation. PeopleSoft Pension Administration divides a pension calculation into nineteen "core functions" such as Service, Final Average Earnings, and Benefit Formula.
Function Result. The calculation rules for any of PeopleSoft Pension Administration's nineteen core functions. These rules match Definitions—the specific parameters for the function—to the Groups of employees that use that particular definition. Function Result also refers to the value produced by the rules.
Future Period. Any pay period which is not current and whose close date hasn't passed (see Time Reporting)

G

GAAP. Generally Accepted Accounting Principals.
Gang Reporting. See Crew Reporting.
General Deduction. Any non-benefit deduction. Examples include charitable deductions, union dues, parking, garnishments, and bonds. General Deductions are calculated from the General Deduction Table; Benefit Deductions draw on one of the benefits tables.
General Schedule (GS). Compensation and pay plan used by the Executive Branch of the federal government.
Generation Control. Generation control elements allow you to indicate to the system whether to process an element based upon criteria you define. There are six parameters that control this function and comprise the definition of the generation control element—HR Status, HR Action/Reason, Segment Status, Frequency, Formula, and Run Types.
Geo RSZ Code. This code is for Belgian employers to track the geographical location for RSZ codes.
Geographic Location Code. In Canada this code is prescribed by the government and refers to the location a business is in.
Grace Period. A period that is a number of hours or minutes before or after a scheduled punch where a time reporter's punch is accepted. For Stock Administration, the period of time an optionee has to exercise an option after termination and before the option expires.
Grade. A range of pay in a graduated scale that includes positions of different occupational groups. The work performed should be equivalent as to the level of difficulty and responsibility and the level of qualification requirements of the work. The levels are established and designated within a specific pay plan by law or regulation.
Graduate Education. Successfully completed education in a graduate program for which a bachelor's or higher degree is normally required for admission. To be creditable, such education must show evidence of progress through a set curriculum, i.e., it is part of a program leading to a master's or higher degree, and not education consisting of undergraduate and/or continuing education courses that do not lead to an advanced degree.
Grandfathered Benefit. A benefit that an employee was entitled to prior to a change in the plan and that defines the employee's new minimum level of benefits. The change might be caused by a plan merger, new legislation, or a plan amendment.
Grant. A contractual right giving an individual the option to purchase a specified number of shares of stock through an Equity Compensation Plan. Also known as an option.
Grant Agreement. The legal document issued by a company defining the number of shares granted, grant price, vesting schedule and other terms and conditions of the stock option or stock award.

Grant Date. The date the individual begins participating in a stock purchase offering. The date on which an option or other award is granted. The date the company enters into the grant agreement. The underlying stock's fair market value on this date generally derives the option price.
Grant Price. The price per share at which the stock option was granted. This is the price per share the individual must pay when exercising the option.
Graphical User Interface (GUI). An icon-based user interface to a system.
Gross-up. The process used to calculate taxes and resultant gross pay from a check for an exact net amount.
Group Coverage (Or Generic) Qualification Standards. Standards prescribed for groups of occupational series that have a common pattern of education, experience, and/or other requirements.
Group. Any set of records associated under a single name or variable in order to run various calculations in PeopleSoft Business Processes. In Time and Labor, for example, employees are placed in groups for time reporting purposes, while in Administer Variable Compensation, groups identify which employees are eligible for what forms of compensation. In PeopleSoft Pension Administration, you'll use Custom Statements to define criteria for grouping employees, then by associating calculation rules (Definitions) with specific Groups, you can vary rules for different classes of employees.
Group Security [Time and Labor]. The ability to grant access to employee time, by providing security through Time and Labor's groups functionality. For example, you might want your employees to only access their own records, or allow your supervisors who handle all of the time input for have access to specific groups. You can restrict the user from accessing everyone, or allow the user to be able to access only their own records, or only a specific group. This feature also provides the ability for employees to report their own time.
Group Security. The ability to grant or deny access to groups. You can set up group security by Group ID or by user ID.

H

Handicap Code. A code that identifies a type of physical or mental impairment that substantially limits one or more of an employee's major life activities.
Health and Safety Executive (HSE). Health and Safety reporting for your UK operations is sent to the local office of the HSE per the requirements of the RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrences Regulations).
Health Benefits Code. An alpha/numeric code that identifies each Health Benefit plan.
Health Benefits Effective Date. Date the health benefit plan goes into effect or the effective date of cancellation.
High School Graduation Or Equivalent. Applicant has received a high school diploma, General Education Development (GED) equivalency certificate, or proficiency certificate from a State or territorial-level Board or Department of Education.
Highly Compensated Employee (HCE). An IRS employee category applied to employees who are considered "highly compensated" according to a federally set standard. This distinction is used for the purposes of nondiscrimination tests, to determine that Section 401 and Section 129 plans do not discriminate in favor of highly compensated employees.
HIPAA. The Health Insurance Portability and Accountability Act of 1996. PeopleSoft Benefits applications enable you to comply with this act, which requires that employers provide Certificates of Group Health Plan Coverage to employees who have their health coverage terminated. This certificate lists group health coverage an employee had for the twelve month period prior to the date coverage ended as a result of termination of coverage. The HIPAA

certificate will be used by subsequent health coverage carriers to evaluate pre-existing condition clauses, if applicable.

Historical Rules. An element used to set up rules that retrieve data from prior periods. Historical rules can be used in formulas and fictitious calculations.

Hold Grade/Step. Grade/step the employee was in prior to receiving a temporary promotion.

Hold Last Equivalent Increase (LEI). Date held by an employee for this event prior to receiving a temporary promotion. Necessary in order to establish the WGI due date if returning to original grade/step.

Hold Position Description. The new position description number that is the result of a reclassification action prior to the NOA being processed.

Hold Purchase. A flag that tells the system to keep this participant in the purchase process. The hold flag is maintained at the contribution page.

Hold Within Grade Increase (WGI) Due Date. WGI due date prior to an employee receiving a temporary promotion.

Holding Period. Typically refers to the holding period required for ISO's and Qualified Section 423 Purchase Plans, to receive preferential tax treatment on a disposition of shares. See Disqualifying Disposition.

Hours Counting Service. A service calculation that uses actual or generated hours to determine the service credited to a pension plan participant.

Hours Equivalence Service. A service calculation that uses hours to determine service, but that uses a set number of hours per day, week, or other period worked rather than counting actual hours.

HR Action/Reason Category. A group of related job actions—for example, hire and rehire—treated similarly for pension purposes in PeopleSoft Pension Administration.

Human Resources Tables. Any of the tables used by PeopleSoft HRMS applications to set up company information.

I

Ignore Plan. Complex event processing feature of PeopleSoft Benefits Administration that enables the user to designate plan types linked to a particular Event Rules/Event Classification combination as being unaffected by Benefits Administration processing.

Imputed Income. Theoretical income that a company pays on behalf of an employee but the individual does not actually receive. This "theoretical income" must be added to the employee's gross wages. In general, imputed income refers to the value of excess Group Term Life or Dependent Life coverage.

In the Money Option. When the fair market value of the stock is greater than the grant price of an option.

INAIL code. In Italy, the INAIL code is used to classify jobs according to the level of risk associated with the job and the related risk insurance required by the employer. INAIL codes are defined by the employer.

Incentive Plans. Pay plans that are formula-driven based on the expected results defined at the beginning of a performance cycle. Incentive plans can be designed for the individual worker or at group levels such as teams, business units, divisions or company wide.

Incentive Stock Option (ISO). For an option to be considered an Incentive Stock Option, it must have the following characteristics:

- The option must be granted pursuant to a plan which includes the aggregate number of shares which may be issued under options and the employees (or class of employees) eligible to receive options, and which is approved by the stockholders of the granting corporation within 12 months before or after the date such plan is adopted;

- The option must be granted within 10 years from the date such plan is adopted, or the date such plan is approved by stockholders, whichever is earlier;
- The option is not exercisable after the expiration of 10 years from the date such option is granted;
- The option price is not less than the fair market value of the stock at the time such option is granted;
- The option is not transferable by such individual otherwise than by will or the laws of descent and distribution, and is exercisable, during his lifetime, only by him, and;
- The optionee, at the time the option is granted, does not own stock possessing more than 10% of the total combined voting power of all classes of stock of the employer corporation or of its parent or subsidiary corporation.

Income Tax. A tax on income, both earned income (salaries, wages, tips, commissions) and unearned income (interest from savings accounts, dividends if you hold stock).
Incomplete Punch. A punch that cannot be processed (i.e. missing employee ID, invalid date or time)
Incumbent. An employee currently assigned to a position.
In Punch. Indicates start of a shift
Indirect Compensation. Typically involves non-cash types of compensation awarded to the individual in exchange for their contribution to the organization. Common types of indirect pay include health and welfare benefits (for example, medical, dental, vision, long-term disability, short-term disability, unemployment insurance), payment for time not worked (for example, holiday, vacation, sick), and employee services and perquisites (for example, club memberships, parking, holiday gifts).
Individual Occupational Requirements. Requirements, e.g., experience or education, for particular occupational series of positions within a series and are used in conjunction with a group coverage (generic) standard.
Individual Retirement Record (IRR). The Individual Retirement Record is used by the Office of Personnel Management (OPM) as the basic record for determining the retirement benefits payable to separated federal employees and their survivors. Employees covered by the CSRS retirement plan require SF-2806. Employees covered by the FERS retirement plan require SF-3100. In addition, the SF-2806-1 and SF-3101 are used for corrections to the IRR. See also Correction to IRR.
Initial COBRA Events. The event which makes an individual eligible for COBRA coverage. Typical initial COBRA events include loss of benefits eligibility due to termination, reduction in hours, retirement, and military leave, as well as divorce, death of employee, and Medicare entitlement. See COBRA and Secondary COBRA Events.
INSEE (National Institute for Statistical and Economical Studies) Codes. INSEE is an official statistics and economics organization in France. INSEE codes for your French company's organizations are used in regulatory reporting.
INSEE PCS (Classification par Catégorie Socio-Professionnelle) Code. Each PeopleSoft Human Resources French Jobcode is linked to a four-digit INSEE PCS, or social/professional classification code.
Inservice Placement. Includes a noncompetitive action in which a position is filled with a current or former competitive service employee through promotion, reassignment, change to lower grade, transfer, reinstatement, reemployment, or restorations. Inservice placement also includes noncompetitive conversion f appointees whose Federal excepted positions are brought

into the competitive service under Title 5 CFR 316.702, and Department of Defense/Nonappropriated Fund (DOD/NAF) and Coast Guard NAF employees whose positions are brought into the competitive service.

Insider. An officer, director or principal shareholder of a publicly owned company and members of his or her immediate family. This category may also include other employees of the company and people who obtain nonpublic information about the company.

Insider Trading. When a person trades a security while in possession of material non-public information in violation of a duty to withhold the information or refrain from trading. The securities law broadly prohibits fraudulent activities of any kind in connection with the offer, purchase, or sale of securities.

Instance. A row of data on the Positive Input table. Instances of positive input can be entered manually, or can be system generated. They can also be received from other applications, such as PeopleSoft Time and Labor.

Integration Level. The salary level in a defined benefit excess plan at which a higher benefit rate becomes applicable. For example, the following formula uses a $10,000 integration level: 1% of Final Average Earnings up to $10,000 plus 1.75% of Final Average Earnings over $10,000.

Interest. Some companies pay interest on the monies that are being withheld from employees' paychecks. The interest plus the employees' stock purchase contributions are used to purchase stock at the end of the purchase period.

Intrinsic Rewards. A reward that is generated by the worker internally such as job satisfaction, as opposed to Extrinsic Rewards which are tangible rewards.

IRC 423 (Internal Revenue Code 423). The section of the IRC that defines a Qualified Employee Stock Purchase Plan.

IRR Fiscal Data Accumulation. This report accumulates all retirement deductions for employees, as well as any LWOP and any basic pay that was received when an employee was not covered by the CSRS or FERS retirement plans.

IRR Remarks. Special remarks that are documented on an employee's IRR. IRR Remarks can be set up ahead of time and can be system-entered text or employee-specific.

IRR Status. IRRs can be in pending or final status. Those in pending status can be updated and corrected. A final status indicates that the IRR has been processed and can't be updated or corrected except through a Correction IRR or a Supplemental IRR.

IRR Worksheet. A preliminary IRR form that enables an agency to print a pending IRR for a separated employee, review it and make corrections, if necessary. Agencies can also use the IRR Worksheet to view a current IRR for an active employee.

IRS. Internal Revenue Service (of United States of America)

ISO IRS $100K Limit. The limit the IRS places on the exercisable value of Incentive Stock Options (ISOs) of $100K per calendar year based upon the fair market value at the time of grant (Section 422 of the Internal Revenue code).

ISO to NQ Grace Period. The period of time after which an Incentive Stock Option is treated as a Non-Qualified Stock Option for tax purposes upon the termination of employment according to Internal Revenue Code Sections 421 and 422. Depending on the termination reason the option is treated:

- If the termination reason is for any reason other than death or disability, and an exercise occurs more than three months from the termination date, the system withholds taxes as if the option is a non-qualified stock option.

- If the termination reason is disability, the system withholds taxes if an exercise occurs more than twelve months from the termination date.

- If the termination reason is death, the system always treats the option as an ISO.

Issuer. A legal entity that has the power to issue and distribute a security.
Iterative Processing. Refers to a concept on only re-calculating those payees who have had changes and need to be recalculated (if you choose to run your payroll multiple times before actually finalizing it). This concept saves you a lot of time as you only have to recalculate those payees who have had a data change or who you indicate you would like to be recalculated.

J

Job Code. An ID for a job as defined on the Job Code table.
Job Code Components. The pay components assigned to a job code by associating rate codes with job codes on the Default Compensation page or the Non-Base Compensation page of the Job Code table.
Job Code Cost. Evaluation of salaries for specific job codes.
Job Compensation Rate. The compensation rate of the corresponding job row.
Job Events. Actions relevant to an employee's employment—such as a hire, transfer, or termination—that can affect benefit program or plan eligibility. Used by PeopleSoft Benefits Administration. See Event Class.
Job Order Cost Accounting. A cost accounting method that attempts to develop a discrete cost for each job performed or product produced. Only the material, labor, and overhead required to complete the job are attributed to the job cost.
Joint and Survivor Payment Option. A form of pension payment in which benefits are paid for the life of the participant and a beneficiary. Should the beneficiary outlive the participant, the benefit continues (often in a reduced amount) for the life of the beneficiary.
Joint Staffing Report. In the United Kingdom governmental agencies are required submit the Joint Staffing Report. Although it is mainly designed for government sector organizations, commercial organizations may also use this SQR to provide a summary of their staffing by department, job code, gender and full/part time employment status.

K

Key. One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
Knowledge, Skills, And Abilities (KSA). Also known as **Competencies**, these are attributes required to perform a job and are generally demonstrated through qualifying experience, education, or training. *Knowledge* is a body of information applied directly to the performance of a function. *Skill* is an observable competence to perform a learned psychomotor act. *Ability* is competence to perform an observable behavior or a behavior that results in an observable product.

L

Labor Costs. Actual expenditures associated with *salary* portion of time reporter expense
Labor Dilution. A process that occurs after the Labor Distribution process in PeopleSoft Time and Labor. The labor dilution process takes the costs that the payroll system has calculated for payable time, determines an average or rate per hour, and applies the average amount evenly across all reported hours for the day
Labor Distribution. The process of distributing payroll expense to the corresponding payable time entries generated in PeopleSoft Time and Labor.

Labor Distribution Amount. An actual labor cost associated with reported time

Last Equivalent Increase (LEI). Reflects the effective date of the last step received in grade or the last promotion, whichever is most current (does not include QSI). Used as the basis to establish an employee's WGI due date.

Law Enforcement Officers (LEOs). Positions within the Federal government involving law enforcement. Under FEPCA, many of these positions are entitled to additional special pays.

Leave. Time entitled to an employee as a benefit, such as, Sick, Vacation, STD, and LTD. This process is managed by HRMS (see Time Reporting)

Leave Accrual Processing. Processing of leave accruals is used to maintain employee leave balances. All leave benefit plans accrue leave by length of service or number of hours worked. Leave accrual processing is used to determine the employee's leave accrual award and resulting leave balance.

Leave Accruals. Hours that employees earn to use at another time, such as annual leave and sick leave.

Leave Plan. A method for earning and managing leave time

Leave Without Pay (LWOP) Total (Cumulative). An employee's cumulative number of hours of leave without pay (LWOP).

Legend ID. A way of recording information that is displayed upon the Issuance Instruction Report. Can be used to record a notice that should appear on the back of a stock certificate indicating that the shares represented are "Restricted Securities." Can also be used to indicate how shares should be processed, as in the case of Swaps, Trades, Repurchases and SAR Exercises.

Level Income Payment Option. An annuity form of pension payment in which payments are increased in early years (prior to eligibility for Social Security benefits) and decreased in later years when Social Security benefits are also received. The goal is to provide a relatively constant total retirement income both before and after Social Security eligibility.

Level. The section of a tree that organizes groups of nodes.

Lifecycle (of Reported Time). A representation of time through the various stages of Time and Labor; includes processing of current, future, and previous period time from scheduling and time capture through Time Administration and distribution

LIFO (Last In First Out). Method used by companies to record Disqualifying Disposition Income. If a company uses this method they record the optionees disposition of shares by attributing the shares to the most recent exercise, purchase or release dates for which shares remain available for sale.

Load. The feature that initiates a process to automatically load information into a PeopleSoft application—for example, populating the PeopleSoft Benefits database with plan-level election information.

Loan Exercise. A form of cash exercise, typically requiring a loan agreement and a promissory note.

Local Functionality. Local functionality is the set of information in PeopleSoft HRMS that is available for a specific country. You can access this information when you click on the appropriate country flag push button in the global window, or when you access it by a local country menu.

Lock for Confirm. A flag on the Pay Line record that enables users to access the database 7 days a week, 24 hours a day, without affecting or interrupting payroll processing. Issues a warning message "A payroll is currently in process for this employee. This data will not be processed until the next payroll."

Lump Sum. A tax method that determines withholding based on the Canadian Lump-Sum tax table.

Lump Sum Payment Option. A form of pension payment in which some or all of a participant's benefit is paid as a single sum.

Lump Sum Reporting. A Time and Labor process that enables you to report time in a lump sum of hours or units for a single Time Reporting Code, and quantities of time. The system uses a batch process to gather the information you enter, perform edits, and update the daily time tables. The system uses the default assignments you establish for workgroups, taskgroups, shifts and so on.

M

Manual Checks. Any checks calculated and prepared outside of the PeopleSoft Payroll system that you must enter into the system manually.
Manual Events. Events that are inserted by the user manually through the BAS Activity table. Events are actions that occur, which potentially change employee benefit coverage eligibility—see Event Class for more information. Used by PeopleSoft Benefits Administration.
Marginal Tax Rate. The tax rate that applies to the next dollar of income generated.
Market Capitalization. The value of a corporation as determined by the fair market value of its issued and outstanding common stock. It is calculated by multiplying the number of outstanding shares by the current fair market value of a share. Analysts look at market capitalization in relation to book, or accounting, value for an indication of how investor's value a company's future prospects.
Matched Punches. A period between two consecutive punches during which some activity happens measured intervals
Material News. Company news that could be expected to affect the value of a company's securities or influence investors' decisions. Material news includes information regarding corporate events of an unusual and non-recurring nature, news of tender offers, unusually good or bad earnings reports, and a stock split or stock dividend.
Maximum Compensation Hours. The greatest number of hours to be paid for a specified TRC (see Time Reporting)
Maximum Taxable Wage Base. An annual earnings threshold used for Social Security purposes. Pension plans sometimes provide different levels of pension benefits for earnings above and below the Maximum Taxable Wage Base.
Metadata. Metadata is data about data. Metadata is the information a database or application stores to describe your business data. At its simplest, metadata defines the structure of a data field—its data type and size, for example. Metadata can also describe more complex data relationships, such as the rollup structure for a chart of accounts. Reporting and analysis tools should be able to use this metadata to let users access data just as they would from within the application, without having to understand how it is stored.
Minimum Benefit. See Grandfathered Benefit.
Minimum Compensation Hours. The lowest number of hours to be paid for a specified TRC (see Time Reporting)
Missed Punch. A punch that is not entered at the scheduled time (see Time Reporting)
Mortality Table. A table showing rates of death by age. Mortality tables are part of a pension plan's actuarial assumptions.
Multidimensional Analysis. A type of analysis that enables you to look at data from many different dimensions, or attributes. You identify the dimensions of the data, then combine the dimensions in various ways. For example, you might identify five dimensions of your sales data: sales, region, channel, product line, and time. Once you've identified the dimensions, you can "slice and dice" the data based on combinations of these dimensions, such as sales in the Western region for the last quarter.

Multidimensional Database (MDDB). A database that stores data for multidimensional analysis in a proprietary multidimensional format. Users access MDDBs exclusively for reporting and analysis, never transaction processing, so they are optimized for retrieval speed.
Multiple Jobs. Multiple jobs allow you to hire an employee into more than one concurrent job and have them processed through Payroll, Benefits, and Pension. In order to enable this feature, the Multiple Jobs check box must be selected in the PeopleTools Options page.

N

National Association of Securities Dealers, Inc. (NASD). Self-regulatory organization of the securities industry responsible for the regulation of The NASDAQ Stock Market and the over-the-counter markets. The NASD operates under the authority granted it by the 1938 Maloney Act Amendment to the Securities Exchange Act of 1934.
National ID Number. Different 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 Code, and US laborers have a Social Security Number. Each of these different types of National IDs has unique formatting requirements associated with them as well.
Nature Of Action (NOA) Code. Indicates the type of personnel action being processed.
Nature Of Action Description. Describes the NOA code.
Nature Of Action Effective Date. The date the personnel action is effective.
Net-To-Zero Adjustment. A prior period adjustment where no compensation affecting fields on the pre-existing (original) record are changed by the adjustment.
New Hire Report. In the United States the Personal Responsibility and Work Opportunity Act of 1996 (the so-called Deadbeat Dads law) requires employers to report new hires to specified agencies within a pre-determined number of days from the hire date.
Next Year. PeopleSoft Benefits term referring to the next open enrollment processing year.
NIC (Numéro Interne de Classement) Code. In France NIC numbers identify the entities inside the same enterprise, and represent an Internal Filing Number.
Node. An individual item on a tree. Nodes summarize detail values or other nodes, and may or may not roll up into other nodes or levels.
Non-Base Pay. A pay component not included in the job comp rate calculation. It is used by payroll only in the paysheet calculation. For example, non-base pay can be set up for additional work, holiday pay, bonuses, and so on.
Noncompetitive Action. An appointment or placement in a position in the competitive service that is not made by selection from an open competitive examination, and that is usually based on current or prior Federal service. A noncompetitive action includes:

- All of the types of actions described under inservice placement, above
- Appointments of non-Federal employees whose public or private enterprise positions brought into the competitive service under Title 5 CFR 316.701; and
- Appointments and conversions to career and career-conditional employment made under special authorities covered in 5 CFR 315, Subpart F.

Nondiscrimination Tests (NDT Tests). Tests used to help employers ensure that their organization's 401(k), 401(m), and Section 129 dependent care reimbursement plans do not discriminate in favor of highly compensated employees. See Highly Compensated Employees.
Non-Employee [Stock Administration]. An individual who is not compensated directly through the corporation's payroll system but provides a service to the corporation. Examples include Directors, consultants, and Partners.

Non-Employee. Those workforce resources hired to perform a specific job and/or hired for a specific period of time. Although non-employee time will be entered into Time and Labor for the purposes of managing their Task time, non-employee earnings will not be updated to Payroll and they will not be paid through the Payroll system.
Non-HR Employee [Time and Labor]. An individual employed by the corporation who is administered outside of the PeopleSoft Human Resources system.
Non-Job Event. Actions which result in changes to an employee's personal or demographic information that also affect benefit program and plan eligibility—such as an a state or postal code change, a family status change like a divorce, or a birthdate change. Used by PeopleSoft Benefits Administration. See Event Class.
Non-Productive Time. Any employee scheduled work time spent on tasks (or non-tasks) other than those which the employee was hired to perform. This could include time spent in training, time spent in meetings, travel time, and time spent reporting time.
Non-Qualified Dependent. Dependents such as domestic partners, their children, and other people who do not meet the definition of qualified dependents as presented in IRS Section 152. PeopleSoft Benefits applications enable the creation of benefit programs that offer health and life coverage to non-qualified dependents.
Nonqualified Plan. A plan that doesn't conform to ERISA rules. Employers cannot take a tax deduction for contributions to a nonqualified plan; instead, plan benefits are generally paid directly from the employer's assets.
Nonqualified Stock Option (NQ). Any option that does not satisfy the conditions of a statutory stock option under the Internal Revenue Code and therefore does not qualify for preferential tax treatment. Generally, companies can design nonqualified options in almost any way they like. Features are:

- The grant price may be less than fair market value (with some exceptions under state law).
- Grants are not limited to employee of the company or subsidiary.
- No taxable income is recognized at the time of grant.
- Options can be granted to anyone (Employees, Consultants and Board of Directors).
- Difference between the fair market value on the date of exercise and the grant price is treated as compensation income.
- In the U.S., withholding tax obligation arises at the time of exercise.
- Company receives a tax deduction equal to the compensation income recognized.

Nontaxable Benefits. Any employer contributions that are not subject to Federal Withholding Tax, such as an employer's portion of a 401(k) plan.
Normal Form of Payment. The payment form associated with the amount calculated by the benefit formula. Pension Administration uses it as a basis for converting to optional forms of payment.
Normal Hours. The hours an employee is normally expected to be at work for any given workweek.
Normal Line Of Promotion (Career Ladder). The pattern of upward movement from one grade to another for a position or group of positions in an organization.
Normal Retirement Date (NRD). The date on which an employee is eligible to retire and begin receiving pension benefits. Eligibility for normal retirement is typically based on age only.
Northern Ireland Report. In the United Kingdom the Fair Employment (Northern Ireland) Act of 1989 requires private sector employers with more than 10 employees to submit the Northern

Ireland report to the Fair Employment Commission annually. The report indicates the religious composition (referred to as Community Background—Catholic, Protestant, Other) of the workforce, job applicants and appointees.

Not To Exceed (NTE) Date. Types are as follows:

- Appointment NTE Date: Indicates the length of time a person may serve in a position.
- Classification Temporary NTE Date: Established temporary date that is used for a temporary classification of a unique position.
- Health Benefits Renewal Self-Support NTE: Date when an employee's incapacitated child must be reevaluated for care under employee's hospitalization coverage.
- LWOP NTE Date: NTE date is the last day the employee is in leave without pay status. The employee is scheduled to return to duty the next workday.
- Position NTE Date: Indicates the length of time a position is available for use.
- Promotion NTE Date: Specific NTE Date: Specific time for an increase in grade on a temporary basis.
- Suspension NTE Date: Specific time an employee is to be on suspension. No salary is paid for the period.

nPlosion. An nVision feature that enables you to expand rows and columns in your spreadsheet to underlying details, as in drilldown.

nVision. A PeopleSoft reporting tool for importing information from your applications to spreadsheets. You can create a report layout that defines both the data to retrieve and the format of the report, and share report layouts across multiple business units and time periods.

NYSE. New York Stock Exchange

O

Occupant Of Position/Vice. Indicates new position or former occupant of a position.

Occupational Series Code. Designates a grouping of positions similar in work and qualification requirements. They are designated by a title and four digit number (e.g., the Accounting Series, GS-0510).

OECD. This acronym stands for the Organization for Economic Cooperation and Development in Europe.

Off-Cycle Processing. The process of calculating and creating a paycheck for one or more employees aside from the normally-scheduled ***(on-cycle)*** payroll run for their pay group. You typically use off-cycle payroll processing for employees who are being terminated, new hires who weren't entered into the system in time for the last on-cycle payroll run, and employees who received an incorrect paycheck during a normal on-cycle payroll.

Off Date. A specific date that is defined as an off day (see Scheduling)

Off Day. A 24-hour period rounded by daybreaker with no associated shifts (see Scheduling)

Off Day Type. A classification of off days (i.e. holiday, plant shutdown) (see Scheduling)

Offer Period. This is the period of time in which an employee’s ESPP share price is determined.

Officer. An insider who sits on the Board of Directors and who is also an employee of the corporation. Examples include CEO, CIO, CTO, CFO, COO, Corporate Secretary, and Treasurer.

Official Forwarding Address. An employee's mailing address following separation.

Official Languages Act (OLA). Canadian federal institutions are required to report on the official languages used in their departments, in accordance with the Official Languages Act (OLA).

Official Personnel Folder (OPF). The repository of a Federal employee's official documents related to Personnel history.

Official Personnel Folder (OPF) Address. Indicates the address where the Official Personnel Folder is maintained.

Offset Plan. A pension plan where the benefit formula includes an offset of a portion of the participant's Social Security benefits.

OLAP (Online Analytical Processing). OLAP is the multidimensional analysis of application data, performed interactively. The acronym contrasts with OLTP (Online Transaction Processing), which is what most production business application systems do.

Ontario Employment Equity Commission (OEEC). The OEEC requires employers in Ontario to complete workforce surveys.

Open Enrollment. The scheduled annual re-enrollment of plan participants into appropriate benefit programs and, within those programs, benefit options.

Open Price. The price at which a security starts a trading day.

Open Season. A time period during which Federal employees are open to re-enroll in a specific benefit plan and option. Open Seasons can be scheduled at varying times throughout the year and multiple Open Seasons can occur concurrently with each other. For FEHB processing, it is generally the time period from mid-November through mid-December. For Thrift Savings Plan (TSP) processing, these are semi-annual and are generally held from May 15 - July 31 and November 15 - January 31. Open seasons for FEGLI are infrequent and special notification from the OPM would be issued to all Federal employees should they occur.

OPF Code. Indicates where the OPF is maintained.

OPM. Office of Personnel Management.

Option. A contractual right that gives the individual the option to purchase a specified number of shares of stock through an Equity Compensation Plan. Also known as a grant. Regulatory agencies also refer to an option as the right to purchase stock in an employee stock purchase plan. These options are considered granted on the offering begin date.

Option Types. Types of stock options. PeopleSoft Stock Administration supports the following stock option types**.** Incentive Stock Options (ISO), Nonqualified Stock Options (NQ), Tandem Incentive Stock Options/Stock Appreciation Right (ISO/SAR), Tandem Nonqualified Stock Option/Stock Appreciation Right (NQ/SAR), Restricted Stock Award (RSA).

Optional Forms of Payment. Any alternative forms of payment available to a participant retiring under a pension plan. These can include: annuity options paid over the participant's (and possibly a beneficiary's) lifetime; certain term options paid over a specified number of years; and lump sum options paid out in a single payment.

Options Outstanding. The total number of option shares held by optionees. It is the number of Grants less the number of Exercises, Cancellations, and Expirations.

Ordinary Income Tax. An individual's tax on earnings from wages, tips, and all other sources except capital gains. Includes option profits upon exercise of non-statutory options.

Original Option. A stock option that is eligible for repricing. This option has a grant price greater than the current FMV.

OSHA 200 Occupational Injury and Illness Recordkeeping Log. In the United States this record-keeping logbook meets reporting requirements for reporting occupational injuries and illnesses to the Occupational Safety and Health Administration (OSHA). It lists the case numbers and details of each injury and illness that occurred during a calendar year.

Out-of-the-Money. A term used to describe an employee stock option when the current market price is below the option grant price. When an option is out-of-the-money, it costs more to

exercise than the underlying stock is worth. Such options are also described as being "underwater."
Out Punch. Indicates the end of a shift
Output Result Tables. Refer to the database tables that are populated with information at the end of each pay calculation.

Outside The Register Appointment. An appointment in the competitive service made under an agency's applicant supply system because either there is not a sufficient number of eligibles on the appropriate register or no competitor inventory exists. Agencies are also authorized to make temporary limited appointments outside the register at grades GS-12 and below.
Outstanding Option. A stock option that still has unexercised (vested or unvested) uncancelled or unexpired shares. Options with a "pending" status are not included. Only options with a status of 'active' or 'suspended' are considered outstanding.
Override Rate. Cost per hour or unit reported with time used to replace the time reporter's default rate (see Time Reporting)

P

Paired Punches. Two punches for the same employee in chronological order that exists for the purpose of determining the duration between the punches
Par Value. The nominal or face value of a security. It establishes a price floor below which shares may not be issued. With common stock, the company issuing the stock sets par value. Par value has no relation to fair market value. Some companies issue no par value stock.
Parent. A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time depending on its location within the tree.
Partial Pay. The pay processed whenever a job record has an effective date in the middle of a pay period. Typically, this happens whenever you hire, terminate, transfer, or change the rate of pay for an employee mid-period.
Participants. Individuals who elect to participate in the stock purchase plan.
Participation. The PeopleSoft Pension Administration function that determines whether an eligible employee has met the plan's rules for joining the plan. Generally, these rules are based on age and service criteria.
Passive Events. Events that are initiated by a change that has taken place over time, rather than by a direct data entry action. Events are actions that potentially change benefit coverage eligibility. Examples of passive events include an employee's reaching the age of retirement. See Event Class for more information.
Pattern Reporting. A Time and Labor process that enables you to report a start and stop date, a pattern of one or several time reporting codes, associated hours, amounts, or units and task information once for an employee. The system transforms the information into instances of daily time for each scheduled employee work day based on the employee's schedule.
Pay. Types of "pay" are as follows:

- Basic Pay: generally, the total amount of pay received during any one calendar year at the rate fixed by law or administrative action for the position held by the employee or judicial official prior to any deductions and not including any special payments or premium pay.

- Gross Pay: total compensation earned by an employee, annuitant, or survivor of a judicial official prior to any deductions. Includes basic pay plus locality pay; availability pay (if any) for LEOs; special payments (if any); an annuity (if any); plus awards (if any).

- Premium Pay: pay provided to an employee as a regular addition to basic pay (e.g., administratively uncontrollable overtime (AUO), availability pay, overtime, night differential, holiday pay, etc.).

Payable Time. Time that is ready to be collected by the payroll system (see Time Reporting)
Pay Basis. A code indicating the principal condition in terms of time, procedures or criteria, that serves as a basis for computing an employee's pay.
Pay Calculation. Formula that calculates an employee's gross to net.
Pay Calendar. Payroll processing cycle for a given pay group.
Pay Components. Rows in the compensation record. They build the compensation packages in the compensation record.
Pay Confirmation. Process in which the system updates all to-date totals on the database for earnings, deductions, and taxes for pay groups assigned to a given Pay Run ID.
Pay Entity. A pay entity is the organization responsible for making payments to payees. You can also use a pay entity to define the type of currency to be used when processing calculations. The pay entity is a legal definition of an organization from a payroll perspective. In many cases, an organization and a pay entity are the same. However, PeopleSoft Global Payroll does not define a relationship between an organization and a pay entity.
Pay Frequency. Defines how often employees in a pay group are paid—weekly, biweekly, monthly, and so on.
Pay Group. A set of employees grouped together for payroll processing. It's a way of "bundling" payees for more efficient processing. A pay group is made of payees that the system processes at the same time during a pay run.
Pay Period. The established time segments for which employees in a pay group are paid. Pay Periods are defined by their beginning and ending dates.
Pay Period [Time and Labor]. A PeopleSoft Time and Labor period identified as correlating to the periods which employees are paid (see Time Reporting)
Pay Plan. A code that denotes the pay schedule under which an employee is paid , e.g., JS, UG, UJ, etc.
Pay Slip. Either an actual check or an advice notice of a direct deposit. You build these to match your organization's needs. A pay slip is the details of a payment you've made.
Payable Date. The date that a corporate distribution, such as a dividend, is payable to the record holders of a corporation's securities.
Payee. Any payroll recipient. A payee can be an employee or a non-employee of an organization.
Payee Process Stat Record. A record created for each payee during the payroll process. The system creates one Process Stat record per payee for each calendar.
Payee Section. Type of section that can be added to a process list. A payee section defines a set of elements that is to be resolved for a particular payee.
Payline. Record containing standard payroll information for an employee, such as the amount of regular pay, number of regular hours, additional pay (if any), and tax information and job data.
Payroll Certifying Officer. The individual with the delegated authority for approving all items relating to payroll for those employees under his/her authority.
Payroll Process Tables. Records holding data necessary to process a payroll, such as employee, company, and tax information.
Paysheets. Repository for the raw data necessary to calculate pay for employees, including earnings, hours, deductions, taxes, and accounting data.
PBGC Rates and **PBGC Grading.** The interest rates published monthly by the Pension Benefit Guaranty Corporation. There is an "immediate" rate that applies once benefits commence as well as a series of "graded" rates—calculated based on the immediate rate—that are used during the time between benefit determination and a deferred benefit commencement.
Pending Exception. Any known exception to an employee's scheduled workday. Pending Exceptions are future dated (future is defined to be for a date under report beyond the last date of the employee's current pay period).

Pending Time. Time that has been reported or is assumed to have been reported (based on employee work schedule and calendar date) that has not been used by the business entity. Pending Time may be for past, current, and future pay periods. It is the label for those time transactions that are waiting to be used by the business (for example, approved and unapproved time not yet updated to Paysheets).

Pension Status. An employee's standing with regard to a particular pension plan. For example, employees can be active participants, terminated deferred vested, or in pay status.

Performance Appraisal Code. Indicates the level of performance of an employee.

Performance Appraisal Due Date. Date established based on the WGI or LEI for the yearly appraisal of an employee.

Period Closing Offset. In Time and Labor, the closing date beyond which this pay period is not considered current any longer, if the period's closing date is different from its end date. You can enter a positive or negative number of days.

Period of Interest. The maximum period of time containing the data needed to run all the rules in a rule program (see Batch Processing)

Period Segmentation. When an element (like compensation rate) changes mid-period, requiring all other elements in the process list to be calculated multiple times on either side of the date on which the change took place, period segmentation is used. The system calculates each element more than once, using the components that were effective during the different time slices. The system keeps the results of these calculations separate with the object of creating two gross-to-net result sets.

Periodic Processing. In PeopleSoft Pension Administration, any of several batch processes that a plan administrator must run on a regular basis—for example, consolidation of payroll data.

Personal Register (Registre Unique du Personnel). In France, companies are required to be able to produce, at any given time, a Personal Register. For a given establishment, this report lists current employees and employees who left up to 5 years ago.

Personnel Action. Personnel actions are changes to employee data or status resulting from such activities as promotions, transfers, terminations, salary increases, and leaves of absence.

Personnel Representatives (Délégués du personnel). In France it is mandatory for companies with more than 11 employees to elect personnel representatives who will represent all of the employees before management.

Piece Work. Method of compensating time reporters based on units completed rather than hours worked

PIN. Technical term for an element. In PeopleSoft Global Payroll, PIN is often referred to in the online object names and within the batch code. PIN stands for PayitemName.

Plan Administrator. The person selected by the employer to perform the administration of a plan under PeopleSoft Pension Administration.

Plan Eligibility. The PeopleSoft Pension Administration function that uses job data to determine whether an employee may participate in a pension plan. An employee can be eligible based on job data but not be participating because of an unmet service or age requirement.

Plan Type. A unique ranges of codes used during payroll calculation to determine deduction processing rules. See also Benefit Plan Type.

Plan Year. The annual period that a pension plan uses to measure service, earnings, and benefits. Generally, the pension plan year will match the fiscal year of the plan sponsor.

POI. Personnel Office Identifier. Also known as **Submitting Office Number (SON).** These are codes assigned by the OPM to the office(s) delegated authority within an agency to process personnel actions on Federal employees.

Pop Up Payment Option. A variation on a joint and survivor payment option under which the benefit payable to the participant is increased if the beneficiary should die prior to the participant.

Position. The officially assigned duties and responsibilities that make up the work performed by an employee. Positions are linked to Job Codes, which can be considered the electronic version of the Position Description. There can be a many-to-one relationship between the Position and Job Code.

Position Change.

- A move by an employee to another position during the employee's continuous service under the same appointment within the same agency. Also,
- When the employee is entitled to grade retention and moves to another position at or between the retained grade.

Position Date Created. Date the position was created for use in the agency.

Position Description (PD). In accordance with OPM guidelines, an official description, authorized and approved by an agency official, describing duties and responsibilities to be performed. Position classification standards are used to describe the work, classify the work components by occupational series, and factors (e.g. supervisory control, scope, complexity, competencies required) are used to determine the grade level (i.e., salary range) for the position.

Position Description Number. A number assigned to identify various types of Position Descriptions.

Position Description Required. Identifies those positions for which a position description must be maintained.

Position Number. A number that identifies an authorized Position.

Positive Input. Data such as hours worked or a bonus amount entered for elements that change each pay period. Positive input can be entered manually, generated by the system, or received from other applications.

Positive Task Reporting. A method of time reporting in which all required task elements must be provided (see Time Reporting)

Positive Time Reporting. A method of time reporting in which all elements of time must be provided (see Time Reporting)

Post Differential Percent. Additional compensation that may be paid to certain employees who work in Guam or the Northern Mariana Islands.

Post Differential, Non-Foreign. A differential payable to an employee at a location in a non-foreign area if conditions of environment differ substantially from conditions of environment in the contiguous United States and warrant its payment as a recruitment incentive.

Post-56 Military Deposit. The OPM provides guidelines to Federal agencies on how to calculate and process these voluntary employee deductions from pay toward the employee's current retirement fund for those periods of eligible military service.

Pre-encumbrance. An encumbrance that occurs before an employee/employer relationship exists. You encumber funds for an employee you have on staff; you pre-encumber funds for an employee that you anticipate hiring. For example, you would pre-encumber funds for a new position that has just been approved but not filled.

Premium. Any additional compensation for extra hours worked, often expressed in terms of factor-above-normal-per-hour pay, such as time and a half (where one-half is premium pay), double time or triple time. Also, any additional pay provided to a time reporter based on compensation rules (see Time Administration in your *PeopleSoft Time and Labor* PeopleBook).

Prenote. A prenotification or waiting period requested by banks before processing payroll direct deposits.

Pre-Retirement Survivor Annuity (PRSA). A benefit paid to a beneficiary if a pension plan participant dies before commencing benefits. Qualified plans must offer a pre-retirement survivor annuity, although the employee can be required to pay for the coverage with a reduction in the benefit.

Previous Day's Close. The previous trading day's last reported trade.
Price Source. A service provider or publication that reports the trading activity for a stock traded on stock exchanges. Examples include Wall Street Journal and Bloomberg.
Primary Insurance Amount (PIA). The benefit amount calculated under the Social Security benefit formula.
Prior Period. In Time and Labor, any payroll period before the current one.
Prior Period Adjustment. A correction to previously reported time or task information, or an insertion of time or task information that may require the original report to be offset (reversed) and the correct information to be recorded.
Prior Period Adjustment. A change to previously reported time or task information that requires the original report to be offset (reversed) and the correct information to be recorded (see Time Reporting)
Private. A tracking method used by a privately held company to track their daily prices. The Board of Directors typically establishes a price for a period of time. Stock of a privately held company is not traded on an exchange.
Process. See Batch Processes.
Process List. The set of instructions the system uses during a payroll process to determine which elements to resolve. A process list is comprised of sections that identify the sets of elements to be resolved. You build process lists and attach them to calendars.
Process List Manager. The program used during batch processing that reads the Process List and calls the PIN Manager to resolve elements on the list.
Productive Time. Employee scheduled time spent performing any task for which a position was created; work performed on behalf of a business entity that is required for that entity to fulfill its business purpose. Employees doing the work they or someone else was hired to do.
Productive Unit. In Italy employers organize employees into productive units based on agreements between the unions and the employer.
Profiles. Group of employees defined according to a list of job codes and departments. You can use these profiles to ascertain training demands within your organization based on set criteria.
Project. In PeopleSoft Time and Labor, a specific endeavor undertaken to achieve a specific goal. Typically, projects are approved and undertaken with level of cost, schedule, and performance already agreed upon. A project is composed of a set of tasks, each of which requires staffing, provisioning, and/or scheduling. Project progress is often measured in terms of task completion.
Projection. An estimated pension benefit calculated as of a future date or any estimated data used as the basis for such a calculation.
Promotion.

- For positions under the same type job classification system and pay schedule, a promotion changes the employee to a higher grade level or makes permanent a Promotion NTE;

- When the old and new positions are under different job classification systems and pay schedules, a promotion changes the employee to a position with a higher rate of basic pay or makes permanent a Promotion NTE.

Prompting Profile. A task profile usually used by account managers as a way of creating task profiles for employees who report task time differently by customer. For example, you might have an account manager who has fifty customers; when the account manager comes in each day to report time, the system will display all the customers, and indicate which customers it will use as a default if she doesn’t manually report time.
Pro-Rate Purchase. A purchase in which the number of shares to be purchased is prorated according to a specified factor. This may occur when the total number of shares to be purchased is greater than the number of shares allocated to the stock plan from the treasury.

Proration Rule. Element that defines how you want to prorate an item. You use proration rules in numerous places—for instance you could prorate an earning, deduction, or many of the elements that make up an earning or deduction.

Provider. An entity, such as an insurance company, that provides one or more of the benefits your company offers. For example, Metropolitan Life Insurance Company is a provider to companies that use a Metropolitan life plan.

Proxy Person. A highly compensated executive. Corporations must include information regarding the most highly compensated executive officers in their proxy reporting.

Proxy Statement. The document that must accompany a solicitation of proxy appointment under SEC regulations. The purpose of a proxy statement is to provide shareholders with the appropriate information to make an intelligent decision.

Public Company. A company that has held an initial public offering and whose shares are traded on a stock exchange or in the over-the-counter market. Public companies are subject to periodic filing and other obligations under the federal securities laws.

Punch. Precise instances of date and time recorded for a user and measured in seconds, minutes, hours, day, month and year and time zone (see Time Reporting)

Punch Duration. Length of time between two punches in increments of hours or partial hours (see Time Reporting)

Punch Matching. Area of the application which converts paired punches to punch duration by processing rounding rules and assigning the tasks to the appropriate logical day based on rules established by the user

Punch Restriction. The facility to constrain a time reporter's ability to create a punch that deviates from the schedule (see Time Reporting)

Punch Type. A user defined classification of punches, i.e. In, Out, Start, Stop (see Time Reporting)

Purchase. The issuance or purchase of shares through a stock purchase program. The purchase is made using current contributions from a participant and any carry-forward remaining for the participant from previous purchases.

Purchase Price. The discounted price paid for the shares at the end of a purchase period.

Purge Rules. The rules that define criteria to clear data you no longer need from previous open enrollment processing cycles in PeopleSoft Benefits Administration.

Pyramiding. A computer calculation enabling an individual owner of one share of stock to use the stock-swap technique to exercise a stock option of any size without using cash. Not many corporations permit pyramiding.

Q

QDRO. See Qualified Domestic Relations Order.

QDRO Alternate Payee. A former spouse who is entitled to a portion of a participant's pension benefits as a result of a court order.

QJSA. (Qualified Joint and Survivor Annuity). A post-retirement death benefit for a spouse. Plans subject to this requirement must provide an annuity for the life of the participant with a survivor annuity for the life of the participant's spouse.

QMCSO. (Qualified Medical Child Support Order). A QMCSO is a court order that requires a group health care plan to provide benefits to the child of a participant as part of a child support arrangement on the behalf of that participant. PeopleSoft Human Resources Base Benefits enables the tracking of QMCSOs for dependents.

Qualified Domestic Relations Order (QDRO). A court order ordering a division of a participant's pension benefits. This is normally the result of a divorce and gives a portion of the pension benefits to the former spouse.

Qualified Plan. A pension plan for which the employer can take tax deductions for contributions to the plan. Investment income of the plan trust fund is not taxable to the employer. Tax law places restrictions on the plan rules.
Qualifying Dispositions. A transaction whereby a participant sells shares acquired through a stock purchase plan two years after the grant date and one year after the purchase date.
Quality Ranking Factors. Knowledge, skills, and abilities that could be expected to enhance significantly performance in a position, but are not essential for satisfactory performance. Applicants who possess such KSAs may be ranked above those who do not, but no one may be rated ineligible solely for failure to possess such KSAs.
Quality Step Increase (QSI). A step increase awarded to an employee for sustained high quality performance.
QuickSales. At the end of each purchase period, a company may facilitate a QuickSale Program. Stock purchase participants must file an irrevocable election to participate in the QuickSale Program. Upon completion of the purchase process, the company notifies the stockbroker of all the participants in the QuickSale Program and the number of shares that are being sold by each person. This allows the broker to group the shares together for a bulk sale, which in turn can provide a greater selling price for each participant. This feature is beyond scope for R8.

R

Race And National Origin Code. A code that identifies the employee's basic racial and national origin category.
Range of Dates Reporting. A Time and Labor process that enables you to report a start and stop date, a time reporting code and task information for a single employee. The system transforms the information into instances of daily time based on the employee's schedule or default work schedule, replacing the scheduled time with the entered Time Reporting code and the number of scheduled hours on a day-to-day basis.
Rapid Time Entry. The process that enables you to enter daily time for single employees without the system editing your field entries. The system populates temporary tables, which are used by a batch process that reads, edits and moves the data into the appropriate time and labor tables. You cannot prompt for valid values in any of the fields, and the online system does not edit any of the data you enter against other tables.
Rate Code [Global Payroll]. IDs for pay components. Rate codes define rates of pay and are set up in the Comp Rate Code table. Rate codes are then used to represent pay components in pages and when you configure compensation packages in the compensation record.
Rate Code. Alphanumeric reference to the cost per hour or unit of time reported to a specific TRC
Rate Code Group. A rate code group is a number of pay components (represented by rate codes) bundled into a subset of a compensation package. The rate code group is used to calculate percentage-based components that do not apply the percentage to all pay components in the compensation package. Rate code groups are constructed on the Rate Code Groups page.
Rate Code Type. Defines how the monetary value of the rate code is calculated. The compensation rate code type is defined on the Comp Rate Code table. Valid values are Flat Amount, Hourly Rate + Flat Amount, Hourly Rate, Percent, and Points.
Rates. The arrays of values used to calculate the cost of a plan to an employee. Rates can be age-graded, service-related, or general, depending upon the benefit plan type. Any number of benefit program and benefit plan combinations can use each set of rates.
Rating Model. The scale used by your company to measure competency proficiency. The default rating model is the PSCM (PeopleSoft Competency Management) Rating Model that PeopleSoft delivers with your PeopleSoft Human Resources System.

Raw Punches. See Actual Punch; typically this is distinguished from a rounded punch (see Time Reporting)
Reason Code. A code describing employee time such as comments for sick time or travel time.
Reassignment. Change of an employee from one position to another without promotion or change to lower grade.
Record Date. The date a stockholder must officially own shares in order to vote at the meeting or to derive an adjustment resulting from a stock split or a stock dividend. The Board of Directors sets the Record Date.
Record Owner. The "Stockholder of Record" of the stock. This may be different from the "Beneficial Owner" of the stock.
Reduction In Force (RIF) . Method used to reduce the number of government workers in an agency.
Reemployed Annuitant. An employee who has retired from Federal employment and is receiving an annuity. His/her salary is reduced by the amount of the annuity.
Referential Integrity: Issues that occur when an update to an instance of one object invalidates one or more instances in a related object. In other words, when you make a change to one area of the application, referential integrity makes sure the changes do not adversely affect another area of the application.
Refresh Time. The process that retrieves the appropriate current version of objects related to employee time (such as task profiles or work schedules) and associates them with that time.
Regional Stock Exchanges. Organized securities exchanges located outside of New York City and registered with the SEC. Some examples are the Philadelphia, Midwest, Pacific and Boston exchanges.
Register of Separations and Transfers (ROST). The ROST is a regulatory compliance document used by federal agencies to summarize the information in an employee's Individual Retirement Record (IRR). The ROST is a one-page cover sheet that accompanies a batch of IRRs being submitted to the Office of Personnel Management (OPM) at the time of an employee's separation from a federal agency. Employees covered by the CSRS retirement plan require SF-2807. Employees covered by the FERS retirement plan require SF-3103.
Registration Statement. The document that must be filed to permit registration of an issue of securities under the Securities Act of 1933. A major component of the registration statement is the prospectus that is to be supplied to prospective purchasers of securities.
Registration. The name or names that appear on the stock certificate to indicate who owns the stock.
Regular Time. An employee's normal (scheduled/shift) work hours.
Regulation T. Federal Reserve Board regulations governing the extension of credit by brokers or dealers, including their participation in same-day sale transactions and sell to cover exercise.
Regulatory Region. The Regulatory Region functionality in PeopleSoft HRMS is designed for use in performing regulatory and regional edits. You'll use Regulatory Region to drive PeopleCode edits, perform set processing, and control what codes and values the operator sees. A Regulatory Region can be any country (or province or state) where there are specific laws and regulations addressed by functionality in PeopleSoft HRMS.
Related Education. Education above the high school level that has equipped the applicant with the KSAs to perform successfully the duties of the position being filled. Education may relate to the duties of a specific position of to the occupation, but must be appropriate for the position being filled.
Release. An industry standard term associated with the lifting of a company's Repurchase Option from a portion or all shares from a Restricted Stock Award (RSA). RSA's are subject to release schedules, similar to vesting schedules.
Reloads. Some stock option plans provide for the grant of a "reload" stock option in connection with stock option exercises, typically by means of stock swaps. A reload option feature provides

that upon a stock exercise, the employee will receive an automatic grant of a new stock option at the then-current fair market for the shares that they exercised or for the shares that they used to swap.

Remark Codes. Codes that cause the printing of pre-set text passages on a notice of action form. Some passages are general purpose and others are specific to the personnel action being processed.

Replacement Option. The “new” “replacement” stock option that will replace the original stock option. This option will have a grant price lower than the original stock option.

Reported Time. Clock time or elapsed time provided to the system by the user (see Time Reporting)

Reporting Person. An insider that is regularly considered by the SEC to have material information and policy-making authority for the corporation. These individuals are subject to the reporting requirements promulgated by Section 16 of the Securities Exchange Act of 1934. Reporting Persons typically include Directors, Officers, and shareholders with 10% holding interest in the equity of the registrant’s securities.

Repricing Election. Eligible optionees can choose (elect) to accept the corporation’s repricing offer or choose to decline the offer.

Repricing. An agreement between the corporation and the optionee that allows the optionee to cancel an outstanding high-priced, usually "Out-of-the-Money" stock options for lower-priced options.

Repurchase. The reacquisition of shares of stock from an individual by a corporation. This usually occurs when an individual fails to meet the vesting requirements on a RSA or option that is exercised before it vested. The corporation might pay the original cost of the shares to the individual or the fair market value of the shares at the time of repurchase.

Repurchase Option. An irrevocable, exclusive option to repurchase up to the number of shares that constitute Unreleased Shares at the original purchase price per share. The Company shall exercise said option. The repurchase of outstanding shares is regulated under the laws of all states (except Massachusetts). Under some laws, as under the Model Business Corporation Act, the repurchase is prohibited unless the corporation remains solvent, in both the equitable and bankruptcy senses of insolvency and after taking any liquidation preferences of other outstanding stock into account.

Repurchase Right. A company's contractual right to buy back from an employee any stock resulting from the exercise of the option. The buy back can be at fair market value, book value, or the original purchase price.

Restricted Punch. A punch which is not accepted because it occurs outside of the predefined number of hours and minutes before or after a scheduled (Understanding Time Collecting Device)

Restricted Securities. Securities issued privately by the company, without the benefit of a registration statement. Restricted securities are subject to a holding period before they can be sold under Rule 144.

Restricted Stock Awards (RSA). An award of shares of stock to an individual, typically granted at the par value or for no consideration. The shares are awarded on the basis of some future performance goal, either the passage of time (vesting) or the attainment of a specific goal. When the goal is achieved, the vesting occurs. The individual, typically, has all other shareholder rights over these shares such as, voting and dividend rights. The shares are issued in the name of the individual at the time of the award and are held in escrow until vesting occurs. If an employee terminates prior to the vesting of the shares then the company normally repurchases the unvested shares.

Retained Grade Effective Date. Date employee became eligible or began receiving a retained grade and pay.

Retained Grade Expiration Date. Expiration date of an employee's retained grade and pay.

Retirement Coverage Code. A code used to denote an employee's retirement coverage. The major ones include the following:

- Civil Service (CSRS)
- Federal Employees Retirement System (FERS) and FICA
- Foreign Service (FS)
- CSRS Offset
- CSRS - Special (for LEOs)
- FERS and FICA - Special (for LEOs)
- Social Security System
- None

Retirement. Types of retirement are:

- Mandatory Retirement.
- Disability Retirement.
- Voluntary Retirement.
- Special Option Retirement.
- ILIA (In Lieu of Involuntary Action) Retirement.

Retroactive Benefits/Deductions. Deductions taken or benefits granted due to a recalculation of previous benefits and deductions. Late or modified union contracts, late paperwork, and delays in benefit enrollment processing may all result in a need for benefit/deduction recalculation.

Reverse Split. A reduction in the number of outstanding shares of a corporation's stock, with a corresponding increase in the stock's value.

Reversionary Annuity. A form of pension payment where the retiree foregoes all benefit during his or her lifetime so that the entire benefit is paid as an annuity to a beneficiary after the retiree's death. If the beneficiary predeceases the retiree, the benefit is forfeited.

RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrences Regulations). Health and safety regulations in the United Kingdom requiring employers to report certain types of health and safety incidents to the Health and Safety Executive (HSE).

Rider. A special court-ordered or regulatory provision that may be applied to an enrollment to expand or limit any dependent or beneficiary coverage.

RIZIV Code. This code is for Belgian employers to track the Federal Institute for Illness and Disability Insurance category.

ROE (Record of Employment) Reason Codes. ROE codes are defined by the Canadian government for employers to record employment actions such as Return to School or Pregnancy Leave.

Rolling Plan. An ESPP offering period where the purchase date is measured from the offer start date. If at the purchase date, the current stock price is lower than the last stock purchase price, you may elect to reset your employees to the new lower purchase price. The offering period is now based of the new purchase date.

Rounded Punch. A punch that has a company's rounding requirements applied to it (see Time Administration)

Rounding Rule. Defines a rounding rule. You use rounding rules in numerous places—for instance you could round an earning, deduction, or many of the elements that make up an earning or deduction.
Routing Transit Number (RTN) . A number that identifies the financial institution to which an electronic payment should be sent for deposit.
RSZ (Rijksdienst Sociale Zekerheid) Category Codes. These government defined Social Insurance category codes are used to maintain social security records for your Belgian employees. RSZ Categories are associated with a Contract Type, Statute and Substitute for Claeys Formula calculations.
Rule 10b-5. A SEC rule that prohibits trading by insiders on material non-public information. This is also the rule under which a company may be sued for false or misleading disclosure.
Rule 144. A SEC rule that applies to public re-sales of restricted securities as well as all sales by affiliates. The requirements include (1) current public information about the issuer, (2) a one-year holding period for "Restricted Securities," (3) unsolicited brokers' transactions, (4) an amount limitation**.** the greater of 1% of the outstanding stock or the average weekly trading volume may be sold during any three-month period, and (5) a Form 144 filing.
Rule. Representation of a company's compensation, task allocation, or exception requirements (see Creating Rule)
Rule Actions. Functions that can be used in the creation and application of a rule (see Time Administration)
Rule Elements. Customer defined pieces of information which are passed to Time Administration in order to apply and evaluate rules (see Time Administration)
Rule Period. A Time & Labor period used in the evaluation and application of a rule (see Time Administration
Rule Program. Specifies the set of rules the Time Administration process will execute and the order in which it will execute the rules
Rule Results. Net effect of the application of a rule; for instance, the creation of time, initiation of workflow, modification of reported tasks (see Time Administration)
Rule Templates. Templates used to quickly create a variety of rules for the Time Administration program to execute when processing reported and/or scheduled time. Some examples are. compensation rules for overtime and holidays, notification rules for irregular attendance, and rules for just about any other time-reporting situation that requires special processing.
Rules/Time Administration. A physical implementation or execution of a company's compensation, exception and task rules (see Time Administration)
Run Control. A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start some type of program that manipulates data in some way.
Run ID. Code that uniquely identifies a Run Control for batch processes.

S

Salary. Rate of compensation received by an employee.
Salary Step Components. Pay components assigned to a salary step by entering the corresponding rate codes on the Salary Step Components page.
Same-Day Sale. An exercise and sale occurring on the same day. The exercise of the option and sale of the underlying shares take place simultaneously. The broker uses the proceeds of the sale to pay the company the exercise price and any tax withholding and the optionee the net cash (less any brokerage commission/fees).
Schedule. Specific task, date, and time to be worked by a Time Reporter (see Scheduling)

Schedule 13D or 13G. Disclosure forms required to be filed with the SEC and the company by a shareholder (or shareholders) that own(s) more than 5% of a public company. Schedule 13G is a short-form version of the 13D and may generally (but not always) be used only by institutional investors.
Schedule Criteria. Guidelines used to validate the formation and assignment of a time reporter's schedule (see Scheduling)
Schedule Elements. Elements that comprise a schedule such as Workday, Shift, Punches, Tasks, Elapsed Time Duration (see Scheduling)
Schedule Group. A category of employees or employee groups associated for purposes of time scheduling.
Schedule Number. A number identifying the salary table form that an employee's pay is computed. Also has a second meaning related to the Payment Voucher processing for the ECS.
Schedule Request. A time reporter's request (vacation, comp time, overtime, shift) to be taken into consideration when scheduling (see Scheduling)
Schedule Request Types. A classification of schedule requests (see Scheduling)
Schedule Template. An ordered pattern of workday(s) and/or off day(s) used in scheduling (see Scheduling)
Scheduled Punch. A time reporter's expected punch (see Time Reporting)
SDS (Same Day Sale). A same-day exercise and sale transaction.
Secondary COBRA Events. COBRA qualifying events that extend the amount of time a participant is eligible for COBRA coverage. For an event to qualify as a secondary COBRA event, it must fulfill the following qualifications: The participant must already be enrolled in COBRA coverage as a result of an initial COBRA event, the initial COBRA event must be one that is associated with a change to the employee's job status (such as a reduction in hours, termination, or retirement), and the secondary event must be one of the COBRA event classifications that involves loss of coverage for the dependent (such as divorce, marriage of dependent, or death of employee). See COBRA and Initial COBRA Events.
Section. A set of logically related elements that are to be resolved during the payroll process. You define your payroll process by creating sections and adding them to process lists. You can create four different types of sections: standard, generate positive input, sub-process, and payee.
Section 16(a). Provision of the Securities Exchange Act of 1934 that requires company insiders to file changes in beneficial ownership of the company's equity securities and periodic reports disclosing their holdings.
Section 16(b). Provision of the Securities Exchange Act of 1934 that requires that any profit realized by a company insider from the purchase and sale, or sale and purchase, of the company's equity securities within a period of less than six months must be returned to the company. It is also known as the "short-swing profit" rule.
Section 423. The Internal Revenue Code section that regulates Employee Stock Purchase Plans.
Section 83(b) Election. A tax filing within 30 days of grant that allows employees granted restricted stock to pay taxes on the exercise date, rather than the date when restrictions lapse. If an employee files the election, taxes are based on the fair market value on the exercise date, with any future appreciation taxed as a capital gain. If the employee does not file an election, taxes are based on the fair market value on the date the restrictions lapse, which will be higher assuming the stock has appreciated in value.
Securities Act of 1933. Often referred to as the "truth in securities" law, the act requires that investors receive financial and other significant information concerning securities being offered for public sale; and prohibits deceit, misrepresentations, and other fraud in the sale of securities.
Securities and Exchange Commission (SEC). The government agency responsible for the supervision and regulation of the securities markets and industry, as well as the ongoing disclosure obligations of public companies and public securities offerings.

Securities Exchange Act of 1934. The Congressional act that created the Securities and Exchange Commission. The Act empowers the SEC with broad authority over all aspects of the securities industry. This includes the power to register, regulate, and oversee brokerage firms, transfer agents, and clearing agencies as well as the nation's securities self regulatory organizations (SROs). The various stock exchanges, such as the New York Stock Exchange, and American Stock Exchange are SROs. The National Association of Securities Dealers, which operates the NASDAQ system, is also an SRO. The Act also identifies and prohibits certain types of conduct in the markets and provides the Commission with disciplinary powers over regulated entities and persons associated with them. The Act also empowers the SEC to require periodic reporting of information by companies with publicly traded securities.
Security Clearance. Security Clearances (Classified, Secret, Top Secret) are granted to employees by government agencies and are usually associated with jobs that bring employees into contact with classified government projects or sensitive technologies.
Segmentation. You can “segment” components of pay based on such events as changes in compensation, employee status, or job changes during a pay period. For example, if an individual changes jobs in the middle of a pay period and your organization has a practice of separating components earned in the first job from those earned in the second job, you can set up your system to trigger segmentation of earnings results on the pay slip when there is a change to the job change action/reason field.
Selective Factors. Knowledge, skills, abilities or special qualifications that are in addition to the minimum requirements in a qualification standard, but are determined to be essential to perform the duties and responsibilities of a particular position. Applicants who do not meet a selective factor are ineligible for further consideration.
Sell to Cover Exercise. When an optionee sells a portion of the option shares to cover the exercise cost and any applicable taxes.
Seniority Pay. A premium paid for seniority or for the length of time an employee works for an organization.
Seniority Pay Components. Pay components whose rate codes are assigned to the seniority rate code class SENPAY (provided by PeopleSoft) on the Comp Rate Code page, allowing you to access the seniority pay functionality.
Seniority Rate Codes. A premium paid for seniority or for the length of time an employee works for an organization.
Service. The PeopleSoft Pension Administration function that determines how much service credit an employee has accrued.
Service Buy Back. The process by which an employee repays a pension plan in order to restore service credit that was forfeited when the employee withdrawal previous contributions. Typically, employees withdraw contributions upon termination and initiate service buy back processing upon rehire.
Service Purchase. The process by which an employee gets additional pension service credit for periods not normally considered eligible. The employee “purchases” this service by paying into the plan.
Service Schedule. A table showing how much service an employee earns based on the number of hours the employee worked during the year or month.
Sex Code. Used to indicate gender.
Share. A share of a company's stock. Stock options give you the option to purchase a certain number of shares of company stock.
Share Price. The price per share of a company's stock. See, also, "stock price."
Shareholder. Owner of one or more shares of stock in a corporation. Also known as a stockholder or investor.
Shares Available to Issue. The total number of shares authorized, less shares granted, plus cancellations that revert to the Plan pool.

Shares Cancelled. This is usually triggered by a specific event, such as termination of employment in which the unvested shares as of the date of termination are no longer available for future vesting and exercise. These shares are therefore canceled from the option and can be returned to the plan, retired to treasury or allocated back to a group.
Shares Exercisable The number of shares that are vested and available for exercise.
Shares Exercised The number of shares purchased upon exercise of a stock option.
Shares Expired. Option shares that no longer are exercisable at the end of the option term. The length of the option term is defined in option agreement. This date is usually the earlier of the exercise period for vested shares after termination of employment or the full length of the option term.
Shares Outstanding. The number of company shares currently held by shareholders, as tracked by the transfer agent
Shift. A regularly scheduled work period, defined by start and stop times (see Time Reporting)
Shift [Time and Labor]. The block of hours that an employee works in a day, such as nine to five, four to eleven, or ten to six. In PeopleSoft Time and Labor, Shift is used as a template of clock hours for scheduling an employee or group of employees to be at work or available to work (on call). Shifts may be constant, rotating, repeating, and/or split; any given shift may or may not have an associated Shift Differential or Bonus. A shift is always associated with a Work Schedule, and consists of clock hour Start and Stop times (two to allow for split shifts), meal periods (two) and relief periods (two).
Shift Bonus. A fixed amount (either a flat dollar figure or stated in terms of an employee's rate) paid for working a particular Shift.
Shift Code. A numerical shift identifier that is unique within a SetID.
Shift Differential. Any additional compensation for time worked during certain shifts. Typically, shift differential is administered as a flat amount per shift hour worked, or as a percentage of the amount paid per shift hour or Shift worked.
Shift Differential. Additional compensation paid an employee for time worked during certain shifts. Typically, shift differential is administered as a flat amount per shift, hour worked, and/or as a percentage of the amount paid per shift hour or shift worked.
Shift Elements. Individual components of a shift such as TRC start and stop time, duration (see Scheduling)
Shift Name. Customer defined nomenclature for a shift (see Scheduling)
Shift Type. A customer-defined classification associated with a shift. The shift type can be used in the evaluation of rules or exceptions (i.e. On Call) (see Scheduling)
Shift Type [Time and Labor]. Time and Labor defined classification of shifts. Valid shift categories include Flex, General and Elapsed. Shift categories are used in the creation of time reporter schedules (see Scheduling)
Short Sale. The sale of a security that is not owned or is not delivered at the time of the trade, necessitating its purchase or delivery some time in the future to "cover" the sale. A short sale is usually made with the expectation that the stock value will decline, so that the short seller can eventually cover at a price lower than the original sale, thus realizing a profit. At the time of the short sale, the broker borrows stock to deliver on the settlement date. A short sale can be "naked," in which case the seller does not deliver the shares being sold short and must provide the broker with collateral. Or the short sale can be "against the box," in which case the seller delivers the shares being sold short for the broker to hold "in the box" until the seller chooses to close out the short position.
Short-Swing Transaction. A purchase and sale, or sale and purchase, of the issuer's equity securities by an insider within a period of less than six months. See "Section 16(b)" above.
Sibling. A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

SIC Codes. Standard Industrial Classification codes used to classify businesses and industries.
Sick Leave. Sick leave is accrued by full-time permanent/seasonal employees at the rate of 4 hours every biweekly pay period; for part-time permanent/seasonal employees, it is accrued at one hour for every 20 hours worked.
Single Life Annuity. A benefit payable during the lifetime of the participant, with no payments made after the death of the participant. Also referred to as a “life only annuity” or a “straight life annuity.”
SIREN Code (Système Informatique pour le Répertoire des Entreprises). This stands for the Electronic List of Enterprises. The SIREN code is assigned to a company when it registers as a business with the French government, and identifies the purpose of the establishment for regulatory reporting purposes in France.
SIRET (Système Informatique pour le Répertoire des Établissements). This stands for Electronic List of Entities. In France the SIRET is an identifying number given to a French business by the INSEE, an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers. This number is used by the tax and social security authorities to identify a business enterprise and its entities.
Slice. The span of time into which an element is segmented as a result of element segmentation. Unlike a segment (or period), a slice does not represent a separate gross-to-net process since it affects only a limited set of elements within a period or segment. Like segments, slices have their own begin and end dates.
Slice and Dice. Another term for multidimensional analysis. When your data has three (or more) dimensions, you can think of it as being arranged in a cube (or hypercube), with each side representing a dimension. When you analyze the data, you “slice” off part of the cube or “dice” it to get to an individual cell.
Social Security. In PeopleSoft Pension Administration, the function that estimates an employee’s Social Security income.
Social Security Number. Nine numeric digits assigned to an individual by the Social Security Administration. Also known as a **Taxpayer Identification Number (TIN).**
Special Accumulator. A device that accumulates earnings from different sources for a specific purpose. 401(k), pension and retirement plans use special accumulators. A 401(k) plan might use a special accumulator to calculate a deduction using regular, vacation, and overtime earnings. Special accumulators can add to or subtract from a pool of earnings.
Special Payments. A payment that occurs once or under special circumstances (e.g., back pay interest, lump sum leave, bond refund, longevity bonus, compensatory time reimbursement, death payment, severance pay, separation bonus, etc.).
Special Rates. Higher salary rates for specific grade levels and occupational groups determined by OPM for employees working in specific geographic areas. Each area is assigned a separate Schedule Number.
Specialist. A member of a stock exchange who maintains a fair and orderly market in one or more securities. A specialist or specialist unit performs two main functions**.** executing limit orders on behalf of other exchange members for a portion of the floor broker's commission, and buying or selling for the specialist's own account to counteract temporary imbalances in supply and demand, preventing wide swings in stock prices.
Specialized Experience. Experience that has equipped the applicant with the particular knowledge, skills, and abilities to perform successfully the duties of the position and is typically in or related to the work of the position to be filled.
Split Shift. Periods of productive time split up by period of non-working time; example. a time reporter comes to work as a busboy for the lunch shift from 12-2 p.m. and then returns to work from 6-8 for the dinner shift (see Scheduling*)*
Spokesmen Committee (Sprecherausschusse). In Germany the Spokesmen Committee represents the interest of the management in your company before the ownership. The

Spokesmen's Committee is consultative in nature, although they play a co-determination role on individual employment contracts, hiring, and dismissals. They also play a role in monitoring employment fairness, equity, and non-discrimination in terms of nationality, race, religion, sex, and age.

Spouse Demonstration J&S. In the PeopleSoft Pension Administration system, an informational-only form of pension payment that tells what the spouse's total benefit would have been if the retiree had chosen the spouse as the beneficiary rather than a nonspouse beneficiary. You cannot pay pension benefits based on this form because it is informational only.

Spouse Eligibility Alias. In PeopleSoft Pension Administration, a Custom Statement that defines any criteria that must be met before the plan will provide an Automatic Spouse Benefit. For example, the plan may require that the employee and spouse be married a full year before they are eligible for an automatic spouse benefit.

Spouse Eligibility Statement. See Spouse Eligibility Alias.

Spread. Depending on the context, either (1) the difference between the bid and asked prices for an over-the-counter stock, or (2) the difference between an option's exercise price and the market price at the time of exercise (i.e., the profit component of the exercise).

SQL Objects. Used to create rules that are more complicated than templates or actions and conditions allow—select statements, insert statements, table joins, and sub-queries

Standard Form (SF). A standardized form for interagency use by the Federal government. The SF prefix is the most common but not exclusive one in usage.

Startup Data. In PeopleSoft Pension Administration, accrued Service, Cash Balance Account, or Employee Account data loaded into the system in the form of an opening balance and "as of" date. The alternative would be to load the entire accrual history.

Static Group. An employee group in Time and Labor that enables you to control its creation and maintenance. The group remains the same at all times until you change it.

Status Position Code. A code that identifies the various conditions of a position, e.g., frozen, classified, etc.

Step. A secondary level or subcategory within the primary pay level (depending upon pay plan, different employees may have a different number of steps within their primary pay level).

Stock. In corporate finance, the form in which an owner's interest is represented, distributed in units known as shares.

Stock Administrator. An individual who administers and manages the corporation's benefits and/or equity compensation plans. This individual serves as the contact for transfer agent and broker inquiries. Stock Administrators manage Stock Option Plans, Employee Stock Purchase Plans, Restricted Stock Award Plans, and Stock Bonus Plans.

Stock Appreciation Rights (SAR). A contractual right to receive, either in cash or employer stock, the appreciation in the value of the employer's stock over a certain period of time. A SAR can be used alone or in tandem with Incentive Stock Options (ISO/SAR) or Nonqualified Stock Options (NQ/SAR). PeopleSoft Stock Administration supports only tandem SAR's.

Stock Awards. Stock allocations that are processed in the Variable Compensation module. Stock Administration creates stock grants from finalized stock awards.

Stock Exchange. An organized marketplace in which bonds, stocks, and common stock equivalents are traded by members of the exchange, acting as agents (brokers) and as principals (dealers or traders). Such exchanges have a physical location where brokers and dealers meet to execute orders to buy and sell securities. Each exchange sets its own requirements for membership.

Stock Option. A contractual right granted by the company, generally under a stock option plan, to purchase a specified number of shares of the company's stock at a specified price (the exercise price) for a specified period of time (generally five or ten years). Assuming that the exercise price is the same as the fair market value on the grant date, the option will become more valuable if the fair market value goes up, because the option effectively gives the optionee the right to buy stock in the future at a discount.

Stock Price. The price per share of a company's stock. See, also, "share price.

Stock Purchase Participant. An individual who participates in the corporation's Stock Purchase Plan.

Stock Purchase Plan. A type of broad-based stock plan that permits participants to use payroll deductions accumulated over a period of time to acquire stock from the company.

Stock Split. A change in the capitalization of an issuer that increases or decreases the number of securities outstanding, and adjusts the value of the securities accordingly, without a corresponding change in the assets or capital of the issuer. For example, if an employee has options to purchase 25 shares at $10 per share and the company has a 2-for-1 stock split, the employee thereafter has the option to purchase 50 shares at $5 per share.

Stock Swaps. A payment method that can be used to cover the cost of the exercise price and taxes depending on whether it is allowed by the plan. When an employee elects to exercise a stock option by means of a stock swap, they surrender already-owned shares of stock to pay the total required option exercise price and/or taxes for the option being purchased. The surrendered shares are usually valued at the fair market value of the company's stock on the date of exercise.

Stock Trading Symbol. The three or four letter symbol used to identify a company's stock on the stock exchange where it trades. Also known as a "ticker symbol".

Stock Withholding. A cashless method of satisfying the withholding taxes due upon the exercise of a stock option by authorizing the company to withhold from the shares being exercised a number of shares equal to the taxes.

Stockholder of Record. Person or entity, often a broker or the Depository Trust Company, named on the issuer's or transfer agent's stock record books as the owner of shares held in "street name." The stockholder of record acts in part as a way of safekeeping stock certificates that might otherwise be lost by the beneficial owner, and also in order to keep the identity of the beneficial owner confidential from the company.

Stop Time. Out punch

Streams. An optional feature that enables you to reduce processing time by processing groups of payees simultaneously.

Street Name. See "Stockholder of Record".

Strike Price. The price per share which must be paid in order to exercise the stock option. The strike price is typically the fair market value of the stock on the grant date. Also known as the "exercise" or "grant" price.

Structured Query Language (SQL). A federal standard defined in FIPS PUB 127-1.

Sub-Process Section. A type of section you can add to a process list. Sub-process sections are especially useful for performing iterative processes such as gross ups (calculating the gross amount for a given net amount). You can include conditional logic within a sub-process section.

Supplemental IRR. An IRR type used when a federal employee's retirement deductions were originally under-reported. An agency can create a Supplemental IRR to report the difference in the retirement deduction amount to the Office of Personnel Management (OPM).

Supplemental Tax Method. A payroll tax calculation method that uses a straight percent rather than allowances. The percentage depends on state requirements.

Supporting Element Overrides. Provide a mechanism to override various supporting element types, such as brackets, dates, durations, formulas, and variables, at various different levels.

Supporting Elements. Supporting elements are building blocks for other elements. In PeopleSoft Global Payroll, they are used in combination with other elements to create rules. They are not stand-alone. Typical supporting elements are arrays, brackets, rounding rules, and fictitious calculations.

Suspend Exercise. As a condition of a leave of absence, a company may stipulate to restrict the exercise of shares during the leave or for a period of time. Only applicable if the Stock Action is LOA.
Suspend Vesting. As a condition of a leave of absence, a company may stipulate to suspend vesting of shares. Only applicable if the Stock Action is LOA. If a company does not Suspend Vesting then the Vest Deferral Grace Period and Service Rule are not applicable.
System Element. In PeopleSoft Global Payroll, system elements are delivered and maintained by Peoplesoft. There are two types of system elements: database system elements and system-computed elements. Database system elements contain payee-related data that can be used frequently in a calculation, such as department ID, location, and personal data. System-computed elements are automatically populated by the payroll process.

T

T+3. The obligation in the brokerage business to settle securities trades by the third day following the trade date. "Settlement" occurs when the seller receives the sales price (less the broker's commission) and the buyer receives the shares.
Table Lookup. A utility in PeopleSoft Pension Administration that finds an unknown value based on a known one in your data set. For example, you can look up an interest rate based on a year, or an actuarial factor based on an employee's age.
Tardy. The circumstance when a time reporter reports for work after the scheduled start time
Target End Date. The intended end date for employee schedules in Time and Labor reporting. You establish a target end date, and depending on the work schedule templates, the application determines what the actual end date should be.
Target Grade. Highest obtainable grade for a position.
Tariff Area. In Germany, additional labor agreement terms beyond those in the Tariff, such as salary plans or employee reviews, can also be applied based upon the Tariff Area. The Tariff Area is often split along regional lines (such as ***Bavaria*** or ***Berlin***).
Tariff. In Germany a Tariff is a contract between the employee's unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as ***Banking*** or ***Metal***).
Task Profile. A way of viewing or establishing where to allocate employee task information for a day and time. The task profile fields that appear on the page are established by the ***Task Profile Template.***
Task. A piece of work assigned to or demanded of a person; a unit of work (see Time Reporting)
Task Entity. Individual component of a task; for example, Project ID, Activity ID, Work order, Department, Company, Business Unit (see Time Reporting).
Task Profile. Entity that establishes the default values for optional and required task elements. This can be for single or multiple tasks. (i.e. default values based on hours allocation, percentage distribution, equally distributed or by prompt) (see Time Reporting)
Task Rules. a methodology that is applied to scheduled, reported and payable time to allocate or redistribute task assignments (see Time Administration)
Task Transfer. Department transfer
Task Values. The customer defined value for a specific task element i.e. Customer 1, project 1, etc (see Time Reporting)
Taskgroup. Identifies the default time reporting templates, task template, and task profile(s) for time reporters that share the same task reporting requirements.
Taxable Benefits. Any employer contributions that are subject to Federal Withholding Tax.

TDS (Transfert de Données Sociales). In France the TDS is a social security transfer report, submitted on magnetic media to the government.
Temporary Continuation of Coverage (TCC). The TCC program, as prescribed by the OPM, requires Federal agencies to provide to separating Federal employees the opportunity to temporarily continue their FEHB coverage for up to 18 months (unless involuntarily separated because of gross misconduct), provided the individual pays the full cost of coverage, including both the employee and government share and a two percent administrative charge. Agencies may elect to provide this service in-house or enter into cross-servicing agreements with another Federal agency.
Term Certain and Continuous Payment Option. See Certain and Continuous Payment Option.
Term Certain Payment Option. See Certain Only Payment Option.
Termination. A transaction in which an employee ceases to be an employee of the corporation.
Thrift Savings Plan (TSP) . A voluntary retirement savings and investment plan for Federal employees administered by the Federal Thrift Investment Board.
Ticker Symbol. The three or four letter symbol used to identify a company's stock on the stock exchange where it trades. Also known as a "stock trading symbol".
Time Administration. A process which provides four [separate] different online tools for creating, maintaining, and applying an organization's compensation, task, and exception rules to both reported and scheduled time. templates, actions and condition, SQL objects, and user exits
Time Capture Device. Third party system or methodology for collecting elapsed or time capture device time, i.e., time capture device, IVR, Fax, etc. (see Time Reporting)
Time Collection. A Time and Labor feature that collects positive and exception time reports, applies appropriate business rules and edits to the reported time to ensure validity and reasonableness, and returns errors and questionable items to the time reporter for correction or scrutiny. Time collection is also responsible for scrutinizing future (previously) posted time information for correctness when those reports are ready for use.
Time Collection Device. A group of time collection device lumped together and named for ease of assignment to employees. In other words. clock group 1 is made up of clock 1, and clock 2. Employee 123 is assigned to clock group 1 and can then punch in at either clock 1 or clock 2. (see Understanding Time Collection Device)
Time Collection Device time. Reporting time by recording actual starts and stop times (see Time Reporting)
Time and Labor Period. A distinct, configurable period of time used by all the PeopleSoft Time and Labor processes (see Time Reporting)
Time and Labor User. Either a Time Reporter or a Time Manager
Time Manager. An individual who supervises Time Reporters
Time Period. A period of Time used in Time and Labor rules processing. You can categorize time periods in terms of days, weeks, or months. You establish day, week, or month-type periods for use when you apply rules for compensation, holidays, and so on.
Time Report. A payroll time and/or labor distribution time report for an employee for any date within the employee's current period.
Time Reporter. Any employee or contractor for who time is reported or generated in PeopleSoft Time and Labor.
Time Reporter Information. Values associated with the Time Reporter that are displayed when entering or viewing reported time and facilitate the processes of Time Reporting and Time Management (see Time Reporting)
Time Reporting. Any information required by a business unit that can be attributed to an individual employee (worker/contractor) and can be expressed in hours.
Time Reporting Code. A hybrid of two PeopleSoft objects: the Payroll Earnings Type and the Human Resources Absence Type. The Time Reporting Code represents the level at which a

business actually needs to track employee time to support all of its administrative and compensation needs.

Time Reporting Code Type. Categorization of a time reporting code. Valid categories include. units, amounts, hours or a combination of hours and amounts (see Time Reporting)

Time Reporting Group. See Group [Time and Labor].

Time Segment. For Service, Cash Balance Accounts, and Employee Accounts, employees can accrue benefits differently at different times. The period of time during which employees use a particular rule is that rule's time segment.

Total Authorized But Unissued. The combined total number of shares from Shares Available to Issue plus Total Options Outstanding.

Total Compensation Management. The ability to track and report on all types of cash programs, non-cash programs, benefits and deferred compensation for all current workers, ex-workers and individuals associated with ex-workers who receive compensation due to the employment of the ex-worker.

Total Options Outstanding. The number of company shares currently held by shareholders as tracked by the transfer agent. Derived by using the number of Prior Outstanding plus Grants, less Exercises and less Cancellations.

Tour of Duty. The scheduled days and hours per day of attendance at a duty station for an employee.

Training Report 2483. The Training Report 2483 is a French regulatory report used to declare vocational training your company has provided to your employees. It is also known as the Declaration 2483 Report. The purpose of the report is to receive tax deductions from the government based upon the amount of money your company has spent on training.

Transaction Code. Identifies what action has taken place against the position.

Transactional System. A business application for performing the business transactions that keep your company running. Transactional applications, and the databases that support them, are optimized for quick transaction processing. Because they are constantly changing and are not optimized for data retrieval, transactional system databases are not usually the best source of data for analysis.

Transfer Agent is an individual or firm who that keeps a record of your shareholders and the number of shares they own. Transfer Agents also issue new share certificates and cancel old certificates. Unlike Brokers, Transfer Agents are not responsible for selling stocks. Instead they are primarily concerned with maintaining records on all stocks which your company has issued.

Transfer Agent. An institution selected by an issuer to issue and transfer share certificates representing ownership of the outstanding securities of the issuer. An agent of the corporation responsible for registering shareholder names on the corporation's records. The transfer agent maintains a current list of shareholders for purposes of distributing dividends, reports, and other corporate communications.

Transfer Punch. The start of a work period that specifically denotes a change in task and usually compensation-related characteristics

Transferable Stock Options. Options that may be transferred by the optionee, generally only to a family member or to a trust, limited partnership or other entity for the benefit of family members, or to a charity.

Translate Table. A system edit table that stores codes and translate values for the miscellaneous fields on the database that do not warrant individual edit tables of their own. In most cases PeopleSoft maintains the Translate Table.

Transport Rate. The Transport is a statutory deduction in France. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. This deduction is used by the region to subsidize transportation, and maintain and build roads.

Travel And Relocation Date. Length of time an employee must remain in the Government after the Government has paid to relocate him/her from one official duty station to another or for initial appointment.
Treasury Interface files. These are DOS-based files generated by PeopleSoft in accordance with FMS file layouts for transmission of payment data to one of the FMS' Regional Financial Centers.
Treasury Stock. Shares of a company's stock that have been repurchased or otherwise reacquired by the company and are "held in treasury." Whether the treasury shares count as "issued" or as "outstanding" shares of the company is a matter of state corporate law. Generally, a company may not vote its own shares held in treasury.
Treasury Stock Method. The method of calculating primary and fully diluted earnings per share when common stock equivalents such as unexercised stock options exist. Required under generally accepted accounting principles.
Trigger. See Event Trigger.
TRC Program. A program that runs the level at which an organization actually needs to track employee time to support all of its administrative and compensation needs. TRCs are assigned to TRC Programs, which are ultimately assigned to workgroups. Multiple Workgroups can share these TRC Programs.
Trustee Extract. A PeopleSoft Pension Administration data extract containing data that a third party needs in order to produce pension checks.
Type of Appointment. Indicates the specific type of appointment, e.g., part-time permanent, full time temporary, etc.

U

Underlying Security. The security underlying a stock option that an optionee has the right to buy, or the security underlying a convertible security.
Underwater Option. When the current market price is below the option exercise price. When an option is underwater, it would cost more than the underlying stock is worth to exercise the option. Such options are also described as being "out-of-the-money."
Underwriter. An investment banking firm that actually buys the shares from the company in a public offering and then resells them (at a slightly higher price) to its customers.
United States Code (USC). Codifies the laws and regulations of the United States.
Unscheduled Punch. A punch that is made be a time reporter who was not scheduled (see Time Reporting)
Unvested Shares. Unvested stock options are options that have not vested and, therefore, are not exercisable.
URSSAF Code. The URSSAF is the body responsible for ensuring payment of Social Security contributions by all French employers.

V

Valuation. The way a company represents the value of a non-monetary award such as stock.
Variable. Temporary storage for use or defined information used in the creation and application of rules (see Time Administration)
Variable [Global Payroll]. An element type that defines and stores values such as a character, date, or number. You can use variables to create generic formulas for situations where you use the same values over and over again in a calculation.

Variable Plan. A plan in which either the number of shares and/or the price at which they will be issued is not known on the grant date.
Vest Deferral Grace Period Service Rule. If the company provides a vest deferral grace period, they may stipulate that only certain individuals are eligible for the grace period based on service with the company. Only applicable if the Stock Action is LOA. Suspend Vesting must be selected for this rule to be applicable.
Vest Deferral Grace Period. The specified period of time within which an optionee must return from leave to avoid having the vesting differed. Only applicable if the Stock Action is LOA. Suspend Vesting must be selected for this rule to be applicable.
Vest Immediately. A stock option plan may provide that upon specific types of terminations, or upon a case by case scenario, all unvested shares held by an individual can be made immediately vested as of a specific date. Some companies' plans provide that under certain circumstances, such as retirement, the vesting of option shares accelerates upon termination of employment. When this occurs, you must modify the vesting schedule before you terminate the individual.
Vested Shares. Option shares that are free of any ownership restriction. Generally, vested exercised shares are fully owned by the optionee, free from restrictions and freely tradable.
Vested Termination. The termination of an employee who has a vested benefit. The benefit is deferred until the participant reaches retirement age. The employee is considered "Terminated Vested," "Term Vested," or simply "TV."
Vesting Schedule (Template). A convenient way to set up the framework for a vesting schedule that can be uniformly applied to individual options. When you grant stock options, you define a vesting schedule to determine the default-vesting schedule for the option.
Vesting Service. The service used to determine an employee's vesting percentage. Rules for accruing vesting service may be different from rules for accruing other plan service credits.
Vesting. The method by which a granted option becomes free of all restrictions and the Optionee has full rights to the shares.
VETS-100 Federal Contractor Report. This report is required of employers in the United States. It lists federal job classifications, and the number of employees and new hires in the last 12 months who are special disabled military veterans or Vietnam era military veterans. It also provides totals for each job classification of both veterans and non-veterans who hold these jobs.
Virtual Tasks. In Time and Labor, Virtual task data is associated with a taskgroup profile that defines common characteristics for a given Taskgroup and Task Profile ID. A single row of data is linked to multiple Earnings records for multiple employees. By minimizing the physical storage of daily task data we provide enhanced performance without limiting its functionality.
Volume. Total share volume traded in a stock during market hours.

W

Waiver Of An OPM Qualification Standard. Involves setting aside requirements in a published standard to place an employee in a particular position, usually to avoid some kind of hardship to the employee, such as in cases of RIF or administrative error on part of the agency. Extra training and/or skills development may be needed to help the employee adjust to the new position. Waivers are granted by OPM or an agency, as appropriate, on a case-by-case basis, and do not directly affect other positions in the organization.
Warrant. A type of security, usually issued together with a bond or preferred stock, that entitles the holder to buy a proportionate amount of common stock at a specified price, usually higher than the market price at the time of issuance, for a period of years or to perpetuity. A warrant is usually issued as a sweetener, to enhance the marketability of the accompanying fixed income securities. Warrants are freely transferable and are traded on the major exchanges.

WCB. In Canadian provinces the Worker's Compensation Board (WCB) operates as an independent board, and thus would have different requirements in each province. For example, in British Columbia the organization is called the Worker's Compensation Board of British Columbia and in the Province of Quebec, the board is known as Commission de la Santé et de la Sécurité du Travail (CSST).

WGI Due Date. Identifies the date of an employee's next within grade increase. Current policy is that the step increase is implemented on this date automatically unless prevented by the processing of an unsatisfactory performance appraisal.

WGI Non-Creditable Days. Total number of days that cause the WGI due date to be adjusted forward.

Whole Calendar Month. An instruction telling the system to use every day in each month for this time period. The system fills in the last day of the period according to the information you have entered.

Window Period. The ten-day period, from the third to twelfth day after public release of a company's financial statement, when insiders may exercise their stock-appreciation rights without violating Securities and Exchange Commission rules for short-term trading.

Withdrawal. An election not to continue participation in a stock purchase plan.

Withdrawal of Contributions. In a pension plan, the act of returning pension contributions, with interest, to an employee who is terminating. An employee who withdraws contributions typically forfeits all service associated with those contributions. If the employee is later rehired, repayment of contributions and interest typically reinstates the forfeited service.

Withholding. A deduction taken by employers out of taxable income of an individual. Typical withholding taxes include federal income taxes, federal social security, Medicare taxes, and state and local income taxes.

Within Grade Increase (WGI). A longevity-based increase in salary based on predetermined time in grade requirements and acceptable performance.

Work Council (Comitéd'Enterprise). In France it is mandatory for companies with more than 50 employees to elect a Work Council to represent the employees in negotiations with management.

Work Effort. See Activity Type.

Work Period. A Days On/Days Off template; the smallest unit of time that a business uses to communicate with their employees regarding when to be and/or not to be at work (that is, time working and time not working). The work period can be any number of hours. Until clock hour reporting is implemented, the application does not care about the number of hours. The initial Time and Labor product will apply the work period to a calendar day.

Work Schedule. A template consisting of a sequence of work periods (days) on and off, and the number of scheduled hours per work period. Work Schedules and Work Periods should not be confused with calendar days.

Work Templates. Work templates describe your employee's work patterns. Work templates could apply to individuals or entire organizations. For instance, 9 AM to 5 PM, Monday through Friday is a fairly standard working week in organizations.

Workday. A 24-hour period rounded by daybreaker with one or more associated shifts (see Scheduling)

Workday Override. A function that allows a Time Manager to override a Time Reporter's schedule for a single workday. For example, Jane's long-term schedule assignment is Monday – Friday, 8.00 to 17.00. Due to an increase in production demand, her manager needs to schedule her to work 7.00 to 18.00 on Thursday, 16 March 2000. Her manager needs to be able to make this change to her schedule in the PeopleSoft Time and Labor system, so when Jane checks her schedule for this week, she'll see the revised schedule.

Worker. Workers can be defined as anyone who performs functions for the organization and receives compensation from the organization's operating expense funds in return. Workers can be direct employees or independent contractors (includes individuals contracting business directly from the company or through an agency).

Workers Compensation. The days an employee is on LWOP due to sustaining an injury or illness while on the job.

Workflow. The background process that creates a list of administrative actions based on your selection criteria and specifies the procedure associated with each action.

Workforce Monthly Report (Déclaration Mensuelle Obligatoire des Mouvements de Main D'oeuvre). In France, companies that employ 50 or more employees are required to submit the Workforce Monthly Report to the Administrative Division of the Ministry of Work and Social Relations. The report contains workforce information for a given establishment of a company, including the total number of employees and details of employees who have joined or left the establishment during the month.

Workgroup. A user-defined group of employees who share identical compensation rules. A workgroup may be equivalent to all the employees in a business enterprise, all employees in a Paygroup, all employees belonging to the same Union or Union Local, or all employees who work at a specific work location.

Worklist. The automated "to do" list which Workflow creates. From the worklist you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

Works Councils (Betriebsrat). In Germany, the works councils for your company are internal committees elected by the employees that represent the interests of salaried and hourly paid employees, other than management. Every work location in your company has it's works council (this would be the local works council) and the company as a whole has a central works council.

Work Schedule. A method of scheduling a time reporter's time that is based on start and stop times. This method can be used for scheduling clock and elapsed time reporters (see Scheduling). The earliest change date helps determine both the range of dates and the amount of data that will be processed for each time reporter.

Work-Study Program. Government or non-government programs supervised work experience related to a student's course of study and are a part of, or a supplement to, education. Federal student-trainee programs are examples of such programs.

Y

Yearly Maximum Pensionable Earnings (YMPE). Amount set by the government upon which Canadian Pension Plan (CPP) contributions are made.

Z

Zip Code. The term for postal codes in the United States.

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