



PeopleSoft 8.3 ePay
PeopleBook

PeopleSoft 8.3 ePay PeopleBook

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

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

Before You Begin

To benefit fully from the information covered in these books, 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 windows, 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 the PeopleSoft system, much of the information in these books is not procedural. That is, it does not 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. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, 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.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've

removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

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 (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, 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://www4.peoplesoft.com/cc>

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 8.3 HRMS PeopleBooks*, SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks*, SKU PTB814R0.

Note. 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.

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

<i>Field</i>	<i>Definition</i>
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.

Field	Definition
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also Prefecture and Parish)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
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.
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.

Field	Definition
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2, or Telex.
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the 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.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
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.

Field	Definition
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also Province)	State (Province) for address.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, “Creating Field Definitions,” Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

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

Format Using

Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field

Click to refresh the Name field after you’ve edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

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

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and Name Prefix	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee's official first name.
Preferred First Name	For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee's middle name, if applicable.
Last Name	Enter the employee's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters). Note. You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. Warning! Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

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

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

Person Name	
Last:	津村
First:	友則
Alternate Character Name:	ツムラトモリ
Name:	津村 友則

Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS,” Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, Address 2, Address 3, and Address 4	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and Number 2	Enter 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.

House Type	Enter the house type, if applicable.
Postal Search	Click Postal Search to use international address formats.

Entering or Viewing Pay Components

Amounts Tab

Pay Components - Amounts

Rate Code	Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid. Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.
Seq (sequence)	The sequence number of the rate code if it is used more than once.
Details	Click the Details button to open the Comp Rate Code Secondary Panel page.
Comp Rate , (compensation rate) Currency , and Frequency	The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for Percent rate codes.
Points	The salary points associated with this rate code, if any.
Percent	If the rate code rate type is Percent , the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
Rate Code Group	A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.

Comp Rate Code Secondary Panel

Comp Rate Code: TSDFLT

Description: Salaried Default

Base Pay **Use Highest Rate**

Default Without Override

Rate Code Type: Flat Amount

Rate Code Class:

Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Multiple Components of Pay,” **Defining Rate Codes**

Changes Tab

Pay Components							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Manually Updated	Change Amount	Change Points	Change Percent				
1	0	<input type="checkbox"/>	0.000000		0.000	<input type="button" value="+"/>	<input type="button" value="-"/>		

Pay Components – Changes page

This page displays the change in an employee’s salary.

- Manually Updated** The system selects this if you have manually updated the pay components.
- Change Amount** The overall change amount to this pay component rate.
- Change Points** The overall change amount (in points) to this pay component, if applicable.
- Change Percent** The overall percentage change to this pay component, if applicable.

Pay Components							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate				
1		None	<input type="checkbox"/>	<input type="checkbox"/>		<input style="background-color: yellow;" type="button" value="+"/>	<input style="background-color: yellow;" type="button" value="-"/>		

Pay Components – Conversion

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

Source	The system displays the source of the rate code, such as <i>Absorbing Premium</i> , <i>Seniority Pay</i> , <i>Job Code</i> , or <i>Manual</i> .
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
Apply FTE	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

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 not save a page without entering data into all of the required fields on a page.

*Description:	<input type="text" value="This is a required field"/>
----------------------	---

Example of a required field label

In some unique instances a field may be required even though 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).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: <i>field value</i> . We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
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.
See Also	PeopleBooks provide cross-references under the heading “See Also.” Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example:

See Also

About These HRMS PeopleBooks, PeopleSoft 8.3 HRMS PeopleBooks Preface

Note. 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.

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

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	System Name	Navigation	Usage
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the 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.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country 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:

DOC@PEOPLESOFT.COM

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

CHAPTER 1

About the PeopleSoft 8.3 ePay PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft ePay.

This preface explains how to use the documentation for PeopleSoft ePay. General information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks. It provides information about the following topics:

- Using related documentation such as the PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook.
- Ordering documentation on the Internet, on CD-ROM, and in hardcopy.
- PeopleBooks standard page element definitions.
- Required fields on pages.
- Typographical conventions and visual clues in the documentation.
- Process introductory table explanation.
- U.S. Federal Government functionality designation within the documentation.
- Education and Government functionality designation within the documentation.
- Local country functionality designation within the documentation.
- Comments and suggestions about the documentation.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft HRMS Application Fundamentals section explains where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, “About the HRMS PeopleBooks”

CHAPTER 2

Introducing PeopleSoft ePay

This chapter defines the components of PeopleSoft ePay and explains how to:

- Move around PeopleSoft ePay.
- Understand roles and security.
- Set up workflow.

Understanding PeopleSoft ePay Components

PeopleSoft ePay self-service transactions are designed to interface with PeopleSoft's Payroll systems. They enable employees to review, add, and update their payroll information. The self-service transactions that make up PeopleSoft ePay are:

For PeopleSoft Global Payroll Users Only

- Payee Bank Accounts enables employees to enter and maintain their personal bank account information.
- Global Payroll Net Pay Distribution enables employees to define their net pay distribution requirements.
- View Payslip enables employees to review paycheck information for earnings, taxes, deductions, and net pay distribution.

For PeopleSoft Payroll for North American and PeopleSoft Payroll Interface Users Only

- Payee Bank Accounts enables employees to display, add, change, or discontinue direct deposit instructions.
- View Payslip enables employees to review paycheck information for earnings, taxes, deductions, and net pay distribution. (PeopleSoft Payroll for North America only.)
- 3rd Party Pay Inquiry enables employees to review paycheck information for earnings, taxes, deductions, and net pay distribution. (PeopleSoft Payroll interface only.)
- Voluntary Deductions enables employees to add, change, or stop (delete) voluntary deductions.

- W-2 Reissue Request enables employees to request a duplicate W2 to be sent to either their work or home addresses.
- W-4 Tax Information enables employees to change tax withholding information.

Moving Around PeopleSoft ePay

There are two ways to access self-service transactions:


- Home pages.
- Standard menu navigation path.

Home Pages

The home page presents a simple user interface design and direct navigation for the end user.

The links that appear on a home page depend on which collaborative applications have been purchased and whether the product has been selected on the Installation table.

Human Resources Home




My Personal Information
Review and edit your contact information, including name and marital status changes.



Benefits
Review health, insurance, savings, and flexible spending accounts plans in addition to dependent and beneficiary information.



Payroll and Compensation
Access your online payslip, direct deposit, and other deduction or contribution information. Review your job, salary, and compensation history.



Stock Activity
Review stock options and purchase activity, report sales, and update your share issuance instructions.





Training and Personal Development
Enroll in training or review your enrollment status. View your training history, accomplishments, and competencies.


The Human Resources home page


Payroll and Compensation


Payroll

 [Payee Bank Account](#)
Review and edit your direct deposit accounts.


 [View Pay Slip](#)
View your current and prior earnings statements on-line.

 [Voluntary Deductions](#)
Review and edit your voluntary deductions.

 [W-2 Reissue Request](#)
Request a reissue of your W-2 statement.

 [W-4 Tax Information](#)
Review and edit your federal tax withholding exemption and amount.

Compensation

 [Compensation History](#)
Review your annual salary and compensation per pay frequency, as well as any variable compensation.

The Payroll and Compensation home page for PeopleSoft Payroll for North America

Standard Menu Navigation

The standard menu driven navigation path is the traditional PeopleSoft access method. Home pages are easier to navigate for employees who are not PeopleSoft users.

[Home](#) > **Self Service**

- + Develop Workforce
- + Administer Workforce
- + Compensate Employees
- + Monitor Workplace
- + Define Business Rules
- Self Service
- + Global Payroll Australia
- + Administer Self Service
- + Applicant
- + Employee
- + Faculty
- + Manager
- + Optionee
- + eBenefits

Standard self-service navigation path

Understanding Roles and Security

User profiles determine default access to transactions. Create user profiles on the Maintain Security page in the User Profile component. Assign a role to each user profile.

Profiles are linked to access control lists. Each access control list identifies the pages that users can access. To modify access to specific web pages for each role, modify the access control list.

User profiles also control the data each employee can access.

See Also

PeopleTools PeopleBook: Security, “Understanding PeopleSoft Security”

Setting Up Approvals Workflow

Many self-service transactions take advantage of workflow functions, such as approvals workflow. Approvals workflow takes a request entered by an employee or manager and routes it to an approver to accept or deny.

If the approver accepts the request, the system routes it to the next approver. If the request is denied, the request is not routed any further, and the system notes that the request was denied.

If there are no approvers, the system notes that the request has final approval, and the request is routed to someone (such as a stock administrator) for further processing.

Employees and managers can view the approval status of some requests with self-service transactions.

See Also

PeopleTools PeopleBook: Workflow, “Using Workflow” and “Setting Up Workflow Approval Functionality”

CHAPTER 3

Managing Pay Information for Payroll for North America and Payroll Interface

This chapter overview of the PeopleSoft ePay self-service transactions and describes how to:

- Set up leave balance information.
- Set up voluntary deduction information.

Understanding View Payslip

PeopleSoft ePay collaborative application provides employees convenient access to their personal payroll information. It enables them to manage (online) their:

- Direct deposit information.
- Tax withholdings.
- Voluntary deductions.

It also enables employees to:

- Display their payslips.
- Request a duplicate W-2 form.

Setting Up Leave Balance Information

As part of the view payslip feature, employees can display their leave balances. For leave balances to display on the page, you must select the Balance Visible to EE on Self-Service check box on the Leave Plan Table page.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, “Setting Up Benefit Plans”

Setting Up Voluntary Deduction Information

To display or add a voluntary deduction through the self-service transaction, you must select the Allow Update via Self Serv check box on the General Deduction page for the voluntary deduction.

The pages listed in this section are all used by employees.

See Also

PeopleSoft Payroll for North America PeopleBook, “Defining Deductions,” Defining General Deductions

PeopleSoft Payroll Interface PeopleBook, “Defining Deductions,” Defining General Deductions

Pages Used to Manage and View Payroll Information

Page	Object Name	Navigation	Usage
Direct Deposit	PY_IC_DD_LIST	Self Service, Employee, Task, Direct Deposit	View a list of their current direct deposit information
Add Direct Deposit Change Direct Deposit	PY_IC_DD_DATA	Click the Add Account or Edit button on the Direct Deposit page.	Add or change direct deposit information.
Delete Confirmation	EO_DEL_CONFIRM	Click the Delete button on the Direct Deposit page	Delete direct deposit information.
Voluntary Deductions	PY_IC_DED_LIST	Self Service, Employee, Task, Voluntary Deductions	View a list of the current voluntary deductions. To use this transaction, select the Allow Update via Self Serv check box for the voluntary deduction on the General Deduction page.
Add Voluntary Deduction Change Voluntary Deduction	PY_IC_DED_DATA	Click the Add Account or Edit button on the Voluntary Deductions page.	Add change or delete voluntary deduction information.
(USF) Distribution Information	W3_GVT_PY_ALOT_IC	Click the Distribution Information link on the Add Voluntary Deduction page or the Change Voluntary Deduction page	Enter details of the account from which the voluntary deduction is taken.

Page	Object Name	Navigation	Usage
W-4 Tax Information	PY_IC_W4_DATA	Self Service, Employee, Task, W-4 Tax Information	Change tax data. If you work for multiple companies, select the employer for whom you want to change tax information.
View Payslip	PY_IC_PI_DATA	Self Service, Employee, View, View Payslip	For PeopleSoft Payroll for North America users only, view payslip information for any confirmed pay period.
Suppress Paycheck Print	PY_IC_PI_	Click Suppress Paycheck Print on the View Paycheck page.	Indicate if you want a printed copy of your payslip mailed to your home.
3rd Party Pay Inquiry	PY_IC_CHK_DATA	Self Service, Employee, View, 3rd Party Pay Inquiry	For PeopleSoft Payroll Interface users only, view paycheck information for any confirmed pay period.
W-2 Reissue Request	PY_IC_W2_DATA	Self Service, Employee, Task, W-2 Reissue Request	Request to have a new W-2 form sent to your home or office location.

CHAPTER 4

Managing Pay Information for PeopleSoft Global Payroll

This chapter provides an overview of managing pay information and describes how to:

- Define employee bank information.
- Enter payment instructions and distribution details.
- Set up and viewing employee payslips.

Understanding Managing Pay Information

PeopleSoft ePay collaborative application provides PeopleSoft Global Payroll employees convenient access to their personal payroll information. It enables them to manage (online) their:

- Personal account information.
- Preferred mode of payment (bank transfer, cash, check, or postal order).
- Net pay distribution.

It also enables UK, Australia, and Hong Kong employees to view their payslips online.

Defining Personal Bank Information

The steps for setting up and entering personal account data are as follows:

1. Before employees can use the self-service pages to enter personal bank information, you must set up general bank and bank branch information using the Bank Table and Branch Table pages in PeopleSoft Human Resources.
2. If you want to replace default instructions that appear on the Personal Bank Accounts pages with instructions specific to your company, define these instructions on the Banking Instructions page.

The new instructions appear in place of default messages from the message catalogue. If you are a UK user, specify additional instructions on the Banking Instructions page for employees belonging to building societies.

3. Once you set up general bank/branch information, PeopleSoft Global Payroll employees can enter personal bank information, such as bank location and account type, bank and branch name, account name, account number, and currency codes.

Do this on the Personal Bank Accounts pages.

In this section, we discuss how to:

- Set up banking instructions.
- Enter personal bank account information.

See Also

PeopleSoft HRMS Application Fundamentals PeopleBook, “Setting Up Banks and Bank Branches”

Pages Used to Set Up and Enter Personal Bank Information

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Banking Instructions	GP_SS_NPD_CNF_IN ST	Define Business Rules, Define Global Payroll Rules, Setup 5, Self Service Net Pay	(Customers) Override default instructions/messages appearing on the Personal Bank Accounts page (see below) with company specific instructions. (Payroll administrators) Create instructions you want employees to see on the Personal Bank Accounts page. These instructions override any default messages defined by PeopleSoft in the message catalog.

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Personal Bank Accounts	GP_SS_EE_BANK	Self Service, Employee, Tasks, Personal Bank Accounts	(PeopleSoft Global Payroll users) Enter personal bank account information. Using these pages, employees can add new accounts, edit existing account information, and view and delete personal bank information. Once employees have defined their personal account information, they can click the Payroll Payment Instructions link, which takes them to the Payroll Payment Instructions pages where they can define their net pay distribution.

Setting Up Banking Instructions

Access the Banking Instructions page.

Run Types Banking Instructions

Country: CHE Switzerland

Bank Instructions:
If a Bank you require is not available in the list, then please contact your Payroll Administrator in the Zurich head office on x123

Branch Instructions:
If a Branch you require is not available in the list, then please contact your Payroll Administrator in the Zurich head office on x123

Banking Instructions page

Bank Instructions

The message that you enter in this field appears directly above the list of banks that a user can select from on the self-service Personal Bank Accounts - Select a Bank page.

Branch Instructions

If you set up bank branches in the Bank/Branch table, when employees enter personal account information on the Personal Bank Accounts page, they are taken to a list

of available branches. Employees then see any instructions you defined in the Branch Instructions field.

United Kingdom—Building Society Instructions

If an employee specifies a bank location of GBR (Great Britain) and an account type of Building Society Roll Number when they access the Personal Bank Accounts page, the bank selection page displays the instructions you defined using the **United Kingdom—Building Society Instructions** field.

Entering Personal Bank Account Information

Access the Personal Bank Accounts pages.

These pages are designed to be used by payees processed through PeopleSoft Global Payroll.

The steps for employees to add new account information are as follows:

1. On the initial Personal Bank Accounts page, view any previously defined accounts and delete or edit earlier entries.

If you want define a new account, click the **Add a New Account** button, which takes you to a page on which you are prompted to enter a bank location and an account type.

2. Click the **Continue** button, which takes you to a page where you can select a specific bank.
3. If branches have been defined for the bank in the Bank/Branch table, select a branch.
4. Add additional account details, such as the account name, account number, and currency code.
5. Save your information.
6. Click the **Payroll Payment Instructions** link to select a payment mode (bank transfer, cash, check, or postal order) and enter distribution details using your account information.

Note. Any information you enter on the Personal Bank Account pages automatically updates the Bank Account Information page in the PeopleSoft Global Payroll core application.

Entering Payment Instructions and Distribution Details

The steps needed to enter payment instructions and distribution details are as follows:

1. Before employees can distribute payments between different accounts, the payroll administrator must set up general bank and bank branch information in the Bank/Branch table.
2. Once bank/branch data has been set up, the payroll administrator must determine whether employees can define separate payment instructions and distributions for different run

types, such as expenses and bonuses. The administrator must also set default elections and decide whether to “lock” net pay transactions so that employees cannot alter their distributions before or during a banking run.

All of this is done using the Run Types page in the PeopleSoft Global Payroll core product. If you configure the system so that users can specify different distributions for different run types, then users are required to select a run type before entering distribution details.

Note. If an employee has more than one job, they will also need to select the job for which they are entering distribution details.

3. Employees enter personal bank account information on the Personal Bank Accounts pages for those banks and branches set up in Step 1.

The accounts defined here are those to which employees will later be distributing their net pay in Step 4. Any information the employee enters on these pages automatically updates the Bank Account Information page in the PeopleSoft Global Payroll core application. (Alternatively, employees can use the Payroll Payment Instruction pages to add personal account information if required. This is because the personal bank account transaction is incorporated within the payroll payment instructions transaction.)

Note. The Bank Account Information page was designed to enable payroll departments to enter payee bank account information, while the Personal Bank Accounts pages were designed as part of a self-service application enabling payees to enter their own account information online. Regardless of which component is used to enter account information, the account data is reflected in the other component as well because both reference the same bank table (PYE_BANKACCT).

4. After the available run types have been set up (Step 2), employees can distribute electronic transfer payments between the various banks and accounts defined in Step 3 using the Payroll Payment Instructions pages.

Any information employees enter on these pages automatically updates the Net Distribution page in the PeopleSoft Global Payroll core application.

Note. The Net Distribution page was designed to enable payroll departments to define net distribution details, while the Payroll Payment Instructions pages were designed as part of a self-service application enabling payees to set their own distribution amounts and percentages online. Regardless of which component is used to enter this information, the data is reflected in the other component as well because both reference the same bank tables (GP_NETDIST, GP_NETDIST_DT, and GP_NETDIST_DTL).

5. If employees don't want to distribute all their earnings between different accounts, but want to receive some or all their earnings in the form of a check, postal order, or cash, they can select check, postal order, or cash as the payment method, and use the Payroll Payment Instruction pages to define the amounts or percentages to be paid in any one of these forms.

In this section, we discuss how to:

- Define run type information.
- Enter payment instructions and distribution details.

See Also

PeopleSoft HRMS Application Fundamentals PeopleBook, “Setting Up Banks and Bank Branches,” Pages Used to Set Up Banks and Bank Branches

PeopleSoft Global Payroll PeopleBook, “Understanding Banking“

Pages Used to Set Up and Define Payment Instructions and Distribution Details

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Bank Table	BANK_EC	Define Business Rules, Manage Human Resources (GBL), Setup, Bank Branch Table	Set up general bank information needed to enable employee self-service transactions.
Branch Table	BANK_BRANCH_EC	Define Business Rules, Manage Human Resources (GBL), Setup, Bank Branch Table	Set up general bank branch information needed to enable employee self-service transactions.
Run Types	GP_SS_NPD_CONFIG	Define Business Rules, Define Global Payroll Rules, Setup 5, Self Service Net Pay	Set up the net pay distribution options that are available to employees in the self-service net pay distribution transaction. Note that the run types a payroll administrator can establish are controlled by their PeopleSoft Global Payroll security setting (they can see elements for all countries or specific countries). In addition, only run types with a calculation type of Payroll are available.

Page Name	Object Name	Navigation	Usage
Payroll Payment Instructions	GP_SS_EE_NPD_RT	Self Service, Employee, Tasks, Payroll Payment Instructions	(Employees) Distribute net pay between different bank accounts, or request payment in the form of a check, postal order, or cash.

Defining Run Type Information

Access the Run Types page.

Run Types Banking Instructions

Country: CHE Switzerland

Run Type Defaults First 1-2 of 2 Last

*Run Type	Description	Default Election	Net Pay Transaction Locked
1 GXERBONUS	Earnings Bonus Run	<input type="checkbox"/>	<input type="checkbox"/> + -
2 KORYPAY	Payroll	<input type="checkbox"/>	<input type="checkbox"/> + -

Run Types page

The information you enter on this page determines what a payee first sees when accessing the self-service Payroll Payment Instructions pages.

Run Type

Select the run type for which you want to allow or prevent payees from entering distribution instructions.

Only run types with a calculation type of *Payroll* are listed. Your PeopleSoft Global Payroll security settings determine whether you can select run types set up for all countries or only selected countries.

If you do not select run types on this page, payees will see the following message when they access the Payroll Payment Instructions pages: “There are no payroll types set up in the system which you can access. Please contact your Payroll Administrator.”

If you select only one run type, payees will not have to choose a run type before defining their distribution amounts and percentages.

If you select more than one run type, payees must select a run type before entering distribution instructions.

Default Election

Enables you to define the distribution options selected by a payee for a particular run type as a default distribution. The default works as follows: When the banking process is run, the system looks at the run type defined on the pay calendar. It then tries to find the net distribution selections that the payee has made for that run type on the Payroll Payment Instructions pages. If the current run type does not have distribution instructions defined for it, the system uses the distribution amounts and percentage corresponding to the row marked as Default Election.

If you choose a default run type, when payees go to the Payroll Payment Instructions - Payment Instruction Details page to enter their distribution amounts/percentages for that run type, the **Use Payment Instructions for All Payroll Runs** checkbox is selected. This lets payees know that the distributions they make for that run type will be used as the default election. Payees can override this default and set any other defaults they want by clearing the check box.

Net Pay Transaction Locked

Select this check box if you want to temporarily prevent payees from entering distribution instructions for this run type. For example, you may want to select this option while you are running the Banking process.

Doing so causes the following message to appear after the name of the run type on the Payroll Payment Instructions pages: “Locked by Payroll Administrator – please try later.”

Entering Payment Instructions and Distribution Details

Access the Payroll Payment Instructions pages.

These pages are designed for use by payees processed through PeopleSoft Global Payroll.

The steps for employees to enter payment instructions and distribute net pay between different accounts are as follows:

1. On the initial Payroll Payment Instructions page, select the run type for which you want to enter payment instructions and define distribution amounts and percentages.

If the payroll administrator has selected only one run type for distribution on the Run Types page, you are not required to select a run type and can immediately begin entering your distribution details. However, if you have multiple jobs, you must first select the job for which you want to enter distribution and payment instructions, and then specify the run type.

2. After selecting a run type (if multiple types are available), view any previously defined distributions or payment instructions and delete or edit your earlier entries.

If you want to enter new distribution instructions, click the **Add a New Payment Instruction** button. Then select a **Payment Method**—either *Bank Transfer* (if you want to distribute electronic payments between bank accounts) or *Cash, Check, or Postal Order* (if you elect to receive payment in the form of cash, a check, or a postal order).

Selecting a payment method retrieves the Payment Instruction Details page. If you select *Bank Transfer* as the payment method, you can use this page to distribute amounts or percentages to specific banks and accounts. If the payment method is *Cash, Check, or Postal Order*, you must specify the amount or percentage of funds to be paid using one of these methods.

3. Save your elections.

Note. Any information you enter on the Payroll Payment Instructions pages automatically updates the Net Distribution page in the PeopleSoft Global Payroll core application.

Payroll Payment Instructions Page

The following page (described in Step 2) displays previously defined distributions and allows the payee to edit or delete previous entries.

Payroll Payment Instructions

Paul Zingg

This page shows you a summary of the payment instructions that will be used by the payroll process - Payroll - for your job of Customer Services Manager.

These payment instructions will be used for ALL types of payroll runs.

Priority	Bank Name	Account Name	Account Number	Type	Use for Balance	Amount/Percent		
1				Check	<input type="checkbox"/>	0	Edit	Delete
2				Check	<input type="checkbox"/>	75%	Edit	Delete
3				Check	<input checked="" type="checkbox"/>	10%	Edit	Delete

Payroll Payment Instructions page

- Priority** The order in which distributions occur. For example, if a payee wants 350 distributed to her savings account every month and everything else distributed to her checking account, the distribution to the savings account should have a higher priority than the distribution to the checking account.
- Bank Name** If the payment method is *Bank Transfer*, this field displays the name of the bank to which funds are being distributed.

Account Name	If the Payment Method is Bank Transfer , this field displays the name of the account to which funds are being distributed.
Account Number	Displays the account number to which funds are being distributed.
Type	Displays the method of payment: Bank Transfer , Cash , Check , or Postal Order . Select a payment type when adding new payment and distribution instructions.
Use for Balance	If an employee chooses Bank Transfer as the payment type, and an account to which that employee distributes funds is marked as Use for Balance, this account receives any funds left undistributed after all payment amounts or percentages have been parceled out according to the distribution priority. An employee can also apply the Use for Balance option to payment types of Cash , Check , or Postal Order . If an employee does this, any remaining funds are paid in the form of cash, check, or postal order (depending on the payment type selected).
Amount/Percent	Displays the amounts/percentages distributed to each account (if the payment type is Bank Transfer) or paid out in the form of Cash , Check , or a Postal Order .
Add New Payment Instructions	Click to add new account information and distribution details.

Payroll Payment Instructions: Payment Instruction Details Page

The following page (described in Step 2) is used to enter distribution amounts and percentages, as well as other information related to distributions.

Payroll Payment Instructions	
Payment Instruction Details	
Paul Zingg	
Specify your payment instruction details.	
If you wish to use this payment information for all types of payroll please tick the "Use payment instructions for ALL payroll runs" box.	
Payment Method:	Check
<input checked="" type="checkbox"/> Use payment instructions for ALL payroll runs	
Priority:	<input type="text" value="3"/>
Percent:	<input type="text" value="10.00"/>
Amount:	<input type="text"/>
<input checked="" type="checkbox"/> Use for any Remaining Payment Balance	
<input type="checkbox"/> Accept Partial Payment	
<input type="button" value="Save"/>	Return to Payroll Payment Instructions

Payment Instruction Details page

Payment Method	This refers to the payment type that payees must define whenever they enter distribution details: Bank Transfer , Cash , Check , or Postal Order .
Use Payment Instructions for All Payroll Runs	Defined in the documentation of the Run Types page. Used to create a default set of distribution instructions for all payroll runs types for which payees have not specified distribution details.
Priority	Defined in the documentation of the Payroll Payment Instructions page and refers to the order in which distributions will occur.
Percent	Used to define the percentage of the total net pay that should be channeled to the selected bank account or that should be paid in the form of cash, check, or postal order.
Amount	Used to define the amount that should be channeled to the selected bank account or that should be paid in the form of cash, check, or postal order.
Use for Any Remaining Payment Balance	If selected, the system moves into the selected account—or into a cash, check, or postal order payment—any funds left undistributed after all amounts or percentages have been parceled out according to the distribution priority.

Accept Partial Payment

Used when the employee is distributing amounts (as opposed to percentages). For example, let's say that a payee wants to distribute 1,200 each month as follows:

- 500 to a checking account.
- 400 to a savings account.
- 300 to a retirement account.

One month, the payee's net pay is only 1,050. The system still distributes 500 to the checking account and 400 to the savings account, but it cannot distribute the full 300 to the retirement account. If Accept Partial Payment is selected, the system takes the partial amount, in this case, an amount of 150. If Accept Partial Payment is not selected, the system allocates the partial amount of 150 to the checking account or the savings account, depending on which is defined to be used for any remaining payment balance.

Setting Up and Viewing Employee Payslips

PeopleSoft ePay enables PeopleSoft Global Payroll employees in the UK, Hong Kong, and Australia to view their payslips online. In this section, we explain where you should go to set up and view employee payslips for these countries.

In this section, we discuss how to:

- Set up and view the employee payslip for the UK.
- Set up and view the employee payslip for Hong Kong.
- Set up and view the employee payslip for Australia.

Pages Used to View the Employee Online Payslips

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Pay Advice	GPGB_PSLIP_SS	Self Service, Employee, View, View Payslip United Kingdom	View the online payslip for the UK.

Page Name	Object Name	Navigation	Usage
Payslip	GPHK_PSLP_SS	Self Service, Employee, View, View Payslip Hong Kong	View the online payslip for Hong Kong. This page mirrors the printed payslip and contains a series of grids that extract the earnings, deductions, accumulators, arrears, absence, and net distribution details from the core PeopleSoft Global Payroll result tables. These details are based on the elements you select on the Payslip Setup pages.
Payslip	GPAU_PSLP_SS	Self Service, Employee, View, View Payslip Australia	View the online payslip for Australia. This page mirrors the printed payslip and contains a series of grids that extract the earnings, deductions, accumulators, arrears, absence, and net distribution details from the core PeopleSoft Global Payroll result tables. These details are based on the elements you select on the Payslip Template pages.

Setting Up and Viewing the Employee Payslip for the UK

The setup of the UK employee payslip is handled entirely within PeopleSoft Global Payroll for the United Kingdom and is documented in the corresponding PeopleBook. Once you set up the payslip, employees can view it using the Pay Advice page.

See Also

PeopleSoft Global Payroll for the UK PeopleBook, “Setting Up Payslips for the UK”

Setting Up and Viewing the Employee Payslip for Hong Kong

The setup of the employee payslip for Hong Kong is handled entirely within PeopleSoft Global Payroll for Hong Kong and is documented in the corresponding PeopleBook. Once you set up the payslip, employees can view it using the Payslip page for Hong Kong.

See Also

PeopleSoft Global Payroll for Hong Kong PeopleBook, “Setting up Payslips for Hong Kong”

Setting Up and Viewing the Employee Payslip for Australia

The setup of the employee payslip for Australia is handled entirely within PeopleSoft Global Payroll for Australia and is documented in the corresponding PeopleBook. Once you set up the payslip, employees can view it using the View Payslip Australia page.

See Also

PeopleSoft Global Payroll for Australia PeopleBook, “Setting Up Payslips for Australia”

CHAPTER 5

Enrolling in W-2 Import Program

This chapter provides an overview of the W-2 Import Program and describes how to:

- Set up the W-2 Import Program.
- Enroll in the W-2 Import Program.

Understanding the W-2 Import Program

Every year employees face the challenge of filing their tax returns. One aspect of that filing is transferring data from the W-2 form to the tax filing form. Many tax preparation providers are now offering services that enable an employee's W-2 information to be electronically imported into a tax preparation software package.

Integrating with a tax preparation provider involves three parties: PeopleSoft ePay, PeopleSoft MarketPlace, and the tax preparation provider.

- ePay provides the transaction that enables employees to enroll in the program.
- PeopleSoft MarketPlace maintains the employee enrollment data and is responsible for all the communications with the tax preparation providers. This means that once you set up the W-2 Import Program, you don't have to any other set up, even when a new tax preparation provider is added to the program.
- The tax preparation provider requests the employee's W-2 information through a link with PeopleSoft MarketPlace.

Understanding Enterprise Integration Points

The W-2 Import Program uses a business interlink named CO_TAX_IMPORT to send and receive data to PeopleSoft MarketPlace.

To research the technical details of any Enterprise Integration Point (EIP) used by PeopleSoft applications, refer to the online EIP Catalog database under Open Integration Framework in the Documentation section of the Customer Connection website.

Setting Up the W-2 Import Program

Here's how you set up the program:

1. Activate PeopleSoft MarketPlace as a supplier.
2. Define the enrollment period.

See Also

Activating PeopleSoft MarketPlace as a Supplier

Defining the Enrollment Period

Pages Used to Set Up W-2 Import Program

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Merchant Profile	MERCHANTID	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Activate the supplier.
Merchant Authentication	MERCHANTAUTH	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Enter supplier information.
Tax Import Setting	CO_TAXIMP_SETUP	Define Business Rules, Administer Suppliers, Tax Import, Tax Import Settings	Define the time period in which employees can enroll in the tax import program. You must do this for each year you participate in the program.

Activating PeopleSoft MarketPlace as a Supplier

PeopleSoft MarketPlace is already set up in the system, but you may need to modify the data to reflect your registration with PeopleSoft MarketPlace. If you are not registered with PeopleSoft MarketPlace, contact your PeopleSoft MarketPlace representative or go to the W-2 Import Program website at <http://www4.peoplesoft.com/cc/W2import> for more information.

To activate the supplier:

1. Navigate to the Merchant Profile page: Define Business Rules, Administer Suppliers, Use, Merchant Profile.
2. Enter MarketPlace in the Merchant ID.
3. Select the Merchant Enabled check box.
4. Select the Merchant Authentication tab.

5. In the Company ID field, enter the identification number provided by your PeopleSoft MarketPlace representative.
6. In the Company Authentication Token field, enter the Shared Secret password provided by your PeopleSoft MarketPlace representative.

See Also

PeopleTools PeopleBook: Integration Tools, “Merchant Integration”



Defining the Enrollment Period

Access the W-2 Import Settings page.

W-2 Import Settings

Tax Year: 2001

Employee Enrollment Period

*From Date:  *To Date: 

W-2s Finalized

W-2 Import Settings page

Employee Enrollment Period

The **From Date** and **To Date** fields identify the time period during which employees can enroll in the program.

W-2s Finalized

Indicates that W-2s have been finalized and are available for import. This must be selected in order for the W-2 data to be transferred to the tax preparation supplier. Select this check box when all W-2s and W-2Cs are finalized.

Enrolling in the W-2 Import Program

To enroll in the program, the employee uses a series of pages that require the employee to enter a password and email address. After the employee enrolls in the program, the employee can return to the W-2 Import Program self-service transaction to:

- Cancel participation.
- Change email addresses.
- Request a forgotten password.

Page Used to Enroll in the W-2 Import Program

<i>Pages Used</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
W-2 Import Program	CO_TAX_IMPORT	Self Service, Employee, Tasks, Tax Import Participation	(Employees) Enroll in the W-2 Import Program.

CHAPTER 6

Integrating With TALX

This chapter provides an overview of the integration with TALX and describes how to:

- Set up TALX.
- Send data to TALX.
- Use the Employment and Income Verification transaction.

Understanding TALX Integration

Employees often need to obtain verification of current or prior employment and income information for obtaining loans for houses, autos, or other purchases. To automate this process, we have partnered with TALX, to use The Work Number, which provides companies and lenders with an automated process to handle this employment and income verification need. You can access this transaction if you have purchased PeopleSoft ePay and have a license agreement with TALX.

See Also

PeopleTools PeopleBook: Security, "Setting Up Digital Certificates"

Understanding Enterprise Integration Points

The Enterprise Integration Point (EIP) used by the Employment and Income Verification transaction is called `EMPLOYMENT_AND_INCOME_VERIFICATION`.

To research the technical details of any EIP used by PeopleSoft applications, refer to the online EIP Catalog database under Open Integration Framework in the Documentation section of the Customer Connection website.

Setting Up TALX

Here's how to set up TALX:

1. (Optional) Create a special group for the employees who you want to have access to this supplier.

2. Activate TALX as a supplier.
3. Define general information about TALX.
4. Define the fields that will be pulled from the PeopleSoft Human Resources database and loaded into the extract file.
5. Define TALX's file transfer protocol settings.
6. Map the PeopleSoft earnings codes to the supplier's earnings codes.
7. Map the PeopleSoft compensation frequency codes to the supplier's compensation frequency codes.
8. Map the PeopleSoft employee status codes to the supplier's employee status codes.

Pages Used to Set Up TALX

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Merchant Profile	MERCHANTID	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Activate the supplier.
Merchant Authentication	MERCHANTAUTH	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Enter supplier information.
Merchant BI Overrides	MERCHANTBIPARMS	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Enter supplier information.
Define Supplier - General	CO_ESV_SUPPLIER	Define Business Rules, Administer Suppliers, Emp Verify, Define Supplier	Define general information used for setting up the TALX integration.
Define Supplier - File Extract Fields	CO_ESV_SUPP_XTRACT	Define Business Rules, Administer Suppliers, Emp Verify, Define Supplier	Define the fields that will be pulled from the PeopleSoft Human Resources and PeopleSoft Payroll databases and loaded into the extract file.
Define Supplier - FTP Parameters	CO_ESV_SUPP_FTP	Define Business Rules, Administer Suppliers, Emp Verify, Define Supplier	Define TALX's file transfer protocol settings.
Map Supplier Codes - Earnings Code	CO_ESV_EARN_MAP	Business Rules, Administer Suppliers, Emp Verify, Map Supplier Codes	Tie the PeopleSoft earnings codes to the supplier's earnings codes.

Page Name	Object Name	Navigation	Usage
Map Supplier Codes - Compensation Frequency	CO_ESV_FREQ_MAP	Business Rules, Administer Suppliers, Emp Verify, Map Supplier Codes	Tie the PeopleSoft compensation frequency codes to the supplier's compensation frequency codes.
Map Supplier Codes - Employee Status	CO_ESV_STAT_MAP	Business Rules, Administer Suppliers, Emp Verify, Map Supplier Codes	Tie the PeopleSoft employee status codes to the supplier's employee status codes.

Creating a Group ID

Companies may want to control which suppliers an employee can access through a self-service transaction. The Group Build feature in PeopleSoft 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 variety of purposes.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Groups”

Activating TALX as a Supplier

TALX is already set up as a supplier in the system, but you may need to modify the data to reflect your registration with TALX.

To activate TALX:

1. Navigate to the Merchant Profile page: Define Business Rules, Administer Suppliers, Use, Merchant Profile.
2. Enter TALX as the Merchant ID.
3. Select the Merchant Enabled check box.
4. Select the Merchant Authentication tab.
5. In the Company ID field, enter the identification number provided by your TALX representative.
6. Select the Merchant BI Overrides tab.
7. In the Parameter Value field for the Parameter MerchantURL, enter the Single Server Signon URL supplied by TALX.
8. Ensure that the Override check box is selected.

See Also

PeopleTools Integration Tools PeopleBook, “Merchant Integration”

Entering Additional Supplier Information

Access the General page.

General page

Group ID The group build ID you created to identify the employees for whom you want data extracted and sent to TALX. Leaving this field blank means that all employees are selected.

Application ID The ID of the application to which the user is redirected when accessing the self-service transaction. PeopleSoft supplies this data; however, you may need to change this field if instructed by the supplier’s representative.

Server ID Defines the server to which the Extensible Markup Language (XML) message is sent. PeopleSoft supplies this data; however, you may need to change this field if instructed by the supplier’s representative.

Page Instructions The text that appears on the Employment and Income Verification page. Change this text to meet your needs.

File Type There are two predefined naming conventions for the file: production and test. Production is when actual production

data is used; test is when dummy data is being used to test the extract program.

File Directory

The directory where the file resides when it has been created. This is already defined for you; however, you can change this field or override the directory on the run control page for the file extract process.

Defining File Transfer Parameters

Access the FTP Parameters page.

FTP Parameters page

- | | |
|-------------------------|--|
| FTP Address | Enter the supplier's FTP address. |
| FTP User Name | Enter your logon name. The TALX representative provides this information. |
| FTP Password | Enter the password assigned to you in order to access the supplier's ftp server site. The TALX representative provides this information. |
| Confirm Password | Enter the FTP password again. |

Sending Employment and Income Data to TALX

Here's how to send data to TALX:

1. Run the initial file extract process.

This creates a file containing complete employee employment and income history and automatically sends it to TALX. This history includes current and the past two years of gross earnings data, pay period earnings for the past 12 pay periods, and terminated or retired employees for the past three years. Run this process only once.

2. Run the year-to-date file extract process.

This process creates and automatically sends a file containing current employment information and current YTD gross earnings and pay period earnings. Run this process on a regular basis after each confirmed payroll.

Resending a File

If a supplier does not receive a file, it may be necessary to send the file again. The Resend Files via FTP page enables you to select a file from a list of existing, previously sent files and send it again.

If you don't see the file listed, two things might have happened:

- The file was deleted.
- The name of the directory was changed on the Define Supplier - General page.

Important. Resend File via FTP assumes PeopleSoft Process Scheduler and the application server are on the same machine. If they are not on the same machine, the application cannot find the file.

Pages Used to Send Data to TALX

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Employment and Income Verification File Extract	CO_ESV_RUN_CNTL	Define Business Rules, Administer Suppliers, Emp Verify, Process File Extract	Create an extract file and send it to a supplier.
Resend Files via FTP	CO_ESV_REFTP_FILE	Define Business Rules, Administer Suppliers, Emp Verify, Resend Files via FTP	Resend a file to a supplier.

Using Employment and Income Verification

Employees can access the Employment and Income Verification transaction either through:

- A link to the Work Number (TALX) on the PeopleSoft ePay homepage.
- Self Service, Employee, Tasks, Employment and Income Verification.

Once employees access The Work Number (TALX) website, they request a Salary Key that is a single-use authorization code. Employees give this code, along with any other necessary information, to the lending institution. The lending institution uses this information to access the employee employment and income information located in The Work Number's database.

Pages Used to for Employment and Income Verification

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Employment and Income Verification	CO_ESV_SIGNON	Self Service, Employee, Tasks, Employment and Income Verification	(Employees) Initiate the employment and income verification process.

CHAPTER 7

Integrating With Discounts and Perks Suppliers

This chapter discusses the integration with discount and perk suppliers and explains how to:

- Set up discount and perks suppliers.
- Send eligibility data to discounts and perks suppliers.
- Set up supplier links.

Understanding Discounts and Perks Suppliers Integration

Many companies make special discounts and perks available to their employees as part of an overall total compensation program. However, most human resource departments have limited resources and do not have the ability to administer every voluntary benefit or perk program in-house.

By contracting with a supplier, a company gains a robust benefit offering, while reducing their administration and cost.

Understanding Enterprise Integration Points

When connecting to discounts and perks suppliers, the system uses an Enterprise Integration Point (EIP) called DISCOUNT_AND_PERKS.

To research the technical details of any EIP used by PeopleSoft applications, refer to the online EIP Catalog database under Open Integration Framework in the Documentation section of the Customer Connection website.

Before You Begin

Companies may want to control which suppliers employees can access through a self-service transaction. The Group Build feature in PeopleSoft Human Resources gives you a standardized way to create groups of eligible employees.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Groups”

Setting Up Discounts and Perks Suppliers

Here's how you set up a discounts and perks supplier:

1. Activate a discounts and perks supplier so that the PeopleSoft application can sign on to the supplier's website.
2. Enter the parameters that the application needs to communicate with the supplier and to define the information being sent to the supplier.
 - a. Create the merchant node.
 - b. Set up eligibility information.
 - c. Set up eligibility fields.

Pages Used to Set Up Suppliers

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Merchant Profile	MERCHANTID	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Activate supplier.
Application Designer	NODE	(In windows client) PeopleTools, Application Designer	Create a node for the supplier and attach it to the channel.
Merchant Authentication	MERCHANTAUTH	Define Business Rules, Administer Suppliers, Use, Merchant Profile	Enter supplier information.
Discounts and Perks Supplier Setup - Eligibility File	CO_DPK_SUPP_TBL	Define Business Rules, Administer Suppliers, Discounts, Supplier Setup	Enter additional supplier parameters and eligibility data.
Discounts and Perks Supplier Setup - Eligibility Fields	CO_DPK_SUPP_TBL 2	Define Business Rules, Administer Suppliers, Discounts, Supplier Setup	Enter eligibility data.

Activating Discounts and Perks Suppliers

Most of the information about the supplier comes loaded in the system. To enter specific data, use the following steps.

To activate a supplier:

1. Navigate to the Merchant Profile page.
2. Select the supplier's name from the list of available suppliers.

3. Select the Merchant Enabled check box.
4. Select the Merchant Authentication tab.
5. In the Company ID field, enter the identification number provided by the supplier's representative.
6. In the Company Authentication Token field, enter the Shared Secret password provided by the supplier's representative.
7. Select the Merchant BI Overrides tab.
8. In the Metatag parameter field, enter the domain name to the address provided by the supplier's representative.
9. In the MerchantURL parameter field, enter the domain name to the address provided by the supplier's representative.

See Also

PeopleTools PeopleBook: Integration Tools, "Merchant Integration"

Creating the Merchant Node

You must first establish a node for the supplier in order to send eligibility information. You need to do this only if you are sending eligibility information as an Extensible Markup Language (XML) message. After you create the node, you must attach it to the message channel used in the eligibility process.

Creating a Node

To create a node:

1. In the Windows client, navigate to PeopleSoft Application Designer.
2. Select File, New, Message Node, and click OK.
A new message node object appears.
3. Select Insert, Location from the menu.
A location dialog box appears.
4. Enter the address of the supplier's application message handler.
The supplier's representative should provide this information.
5. Select File, Save As from the menu, and name this node.
6. Click OK.

Adding a Node

To add the node to the message channel:
--

1. Select File, Open from the menu.

The Open Object dialog box appears.

2. Set the Object Type to *Message Channel*.

3. Set the Name to CO_DPK_ELIG, and click Open.

The message channel object appears.

4. Click the Routing Rules tab.

5. Select Insert, Insert Message Node from the menu.

The Insert Message Node dialog box appears.

6. In the Name field, enter the name of the node you just created and click Insert.

7. Select File, Save from the menu.

See Also

PeopleTools PeopleBook: Application Messaging

Setting Up Eligibility Information

Access the Discounts and Perks Supplier Setup page.

Eligibility File
Eligibility Fields

Discounts and Perks Supplier Setup

BeyondWork

View All
First ◀ 1 of 1 ▶ Last

*Effective Date:

Supplier Logo:

Eligibility File

Send: Changes Only All Employees

File Format: XML Message Flat File

Msg Node:

File Name: Auto Generate File Name

File Directory:

Eligibility Criteria

Group ID:

Eligible Employee Statuses
View All
First ◀ 1-2 of 2 ▶ Last

1	Active	▼	+	-
2	Leave of Absence	▼	+	-

Discounts and Perks Supplier Setup page

Supplier Logo

The image name of the supplier's logo.

Send

Define the data to send to the supplier. If you want to send a complete file containing information on all the eligible employees, select *All Employees*. If you want to send only the changes since the last file was sent, select *Changes Only*.

File Format

Select either *XML Message* or *Flat File* as the type of file format the supplier wants to receive.

Msg Node (message node)

If you selected *XML Message* as the type of file format, select the node to which the system publishes the messages.

File Name

If you selected *Flat File* as the type of file format and did not select *Auto Generate File Name*, enter the name of the file.

When creating your own name, make sure it is a name that helps you easily identify the contents. If you run the extract process more than once using the same name and directory, a sequence number is placed in front of the file name.

For example, if you send a file with the name XYZ twice, the first file name is XYZ.txt and 2XYZ.txt.

To have the system generate a name, leave the File Name field blank and select **Auto Generate File Name**.

Auto Generate File Name Select if you want the system to create a file name for you. When you select this check box, the File Name field is unavailable. The system creates the name using the following format: <Supplier ID>_YYYY-MM-DD-HH.MM.SS.txt.

File Directory If you selected *Flat File* as the type of file format, enter the directory in which the system creates the flat file.

Eligibility Criteria If you want to specify that only certain employees are eligible to participate with this supplier, select a group ID. If you leave the field blank, all employees are eligible for participation.

If you want to further refine employee eligibility, specify that only employee's with certain employee statuses can participate.

Setting Up Eligibility Fields

Access the Eligibility Fields page.

Eligibility File
Eligibility Fields

Discounts and Perks Supplier Setup

BeyondWork

View All
First ◀ 1 of 1 ▶ Last

*Effective Date:

+
-

Eligibility Fields

Personal Information

<input checked="" type="checkbox"/> EmpID	<input type="checkbox"/> Middle Initial	<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Marital Status
<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Name Suffix	<input type="checkbox"/> Language Code	<input type="checkbox"/> Smoker
<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Gender		

Address

<input checked="" type="checkbox"/> Address Line #1	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Postal Code	<input type="checkbox"/> County
<input checked="" type="checkbox"/> Address Line #2	<input checked="" type="checkbox"/> State	<input type="checkbox"/> Country	Address Type: <input style="width: 80px;" type="text" value="Home"/>

Job Information

<input type="checkbox"/> Employee Status	<input type="checkbox"/> Department	<input type="checkbox"/> Employee Type	<input type="checkbox"/> Company
<input type="checkbox"/> Full/Part Time	<input type="checkbox"/> Job Title	<input type="checkbox"/> Standard Hours	<input type="checkbox"/> Pay Group
<input type="checkbox"/> FICA Status	<input type="checkbox"/> Union Code	<input type="checkbox"/> Currency Code	<input type="checkbox"/> Comp Freq
<input type="checkbox"/> Location Code			

Discounts and Perks Supplier Setup - Eligibility Fields page (1 of 2)

Dates			
<input type="checkbox"/> Hire Date	<input type="checkbox"/> Leave Date	<input type="checkbox"/> Termination Date	<input type="checkbox"/> Job Change Date
<input type="checkbox"/> Rehire Date	<input type="checkbox"/> Leave Reason	<input type="checkbox"/> Term Reason	<input type="checkbox"/> Retirement Date
Phone Numbers			
<input type="checkbox"/> Phone 1	Type: <input type="text"/>	<input type="checkbox"/> Phone 2	Type: <input type="text"/>
E-Mail Address			
<input checked="" type="checkbox"/> Email	Type: <input type="text" value="Business"/>		
National ID			
<input type="checkbox"/> National ID	Source: <input type="radio"/> Country	Country: <input type="text"/>	NID Type: <input type="text"/>
	<input checked="" type="radio"/> Primary		
Compensation			
<input type="checkbox"/> Comp Rate 1	Source: <input checked="" type="radio"/> Regular Salary	Frequency: <input type="text"/>	
	<input type="radio"/> Annual Benefits Base Rate		
<input type="checkbox"/> Comp Rate 2	Source: <input checked="" type="radio"/> Regular Salary	Frequency: <input type="text"/>	
	<input type="radio"/> Annual Benefits Base Rate		

Discounts and Perks Supplier Setup page (2 of 2)

Eligibility Fields

Select the fields that you want included in the extract file and sent to the supplier. The employee ID is always included.

Sending Eligibility Data to Discounts and Perks Suppliers

The Discounts and Perk Eligibility process enables you to create a file that contains information on employees who you designated as eligible participants and to send this information to the supplier. The application uses the information you defined on the Discounts and Perks Supplier Setup page to build the file.

When you send the file, you have the option of sending data for all employees that are eligible or to only those employees who are new or have changed information. The first time you send the eligibility file to the supplier, you want to select all employees in order to send a complete file. After that, you can send either the changes only for all employees or all the data for all employees. You should set up a schedule with the supplier for sending the eligibility file on a regular basis.

Pages Used to Send Eligibility Data

Page Name	Object Name	Navigation	Usage
Discounts and Perk Eligibility	RUN_CNTL_DPK_EL IG	Define Business Rules, Administer Suppliers, Discounts, Eligibility File	Send data to the supplier.

Sending Eligibility Data to Discounts and Perks Suppliers

Access the Discounts and Perks Eligibility page.

Discounts and Perks Eligibility page

Supplier ID

Select the supplier for whom you want to create an eligibility file. The fields are already populated with the supplier information entered on the Discounts and Perks Supplier Setup page. You can override the information for this run.

Setting Up Supplier Links

Now that you have established the links between the application and the supplier, the next step is to establish the links between your employees and the supplier.

Links can be placed on:

- Self-service transaction pages.
- Category pages.

Links can take you to:


- The supplier's website.
- A category within the supplier's website.
- A category page.

Category pages are pages that you create. These pages are used to group or organize related supplier information and may contain links that go to another category page or directly to the supplier's website.

Categories are major areas located on the supplier's website. Examples are tickets, health, travel, or finance. Technically, categories are nothing more than a URL address to the supplier's website.


The following page is an example of a category page with links to supplier categories located on the supplier's website.


Discounts and Perks Home Page



[BeyondWork Home](#)


Come on in and browse a while. You'll be amazed at the ways we can help you save time and money. Just one click and you're there!






[Tickets](#)


Get discount tickets to movies, sporting events, theme parks and more.






[Gifts](#)


Need a gift for that special someone? Have a special event coming up? Don't go to the store, go on-line and save time.





[Travel](#)

Let us help you plan for your next trip. Business or Pleasure, we have the resources to make putting together the perfect trip easy.



Example of a category page

Linking to Suppliers

Here's how you set up links to a supplier.

1. Discuss with the supplier the categories or locations available on the supplier's website.
2. Define which categories you want to use.
3. Create those categories using the Define Categories page.

4. If you want a page that contains nothing but links to discounts and perks suppliers, create a category page.
5. Add links to self-service transaction pages or category pages.

Pages Used to Set Up Supplier Links

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Discounts and Perks Category Setup	CO_DPK_CAT_TABLE	Define Business Rules, Administer Suppliers, Discounts, Supplier Categories	Define the areas you want employees to access on the supplier's website.
Discounts and Perks Category Page Definition	CO_DPK_PAGE_TABLE	Define Business Rules, Administer Suppliers, Discounts, Category Pages	Create a category page.
Discounts and Perks Links	CO_DISPRK_LINKS	Define Business Rules, Administer Suppliers, Discounts, Links	Add links to self-service transaction pages.

Common Elements in This Section

Sequence Number	Enter the order in which you want this link to appear on the page.
Page ID	If this link is to a self-service transaction, home page, or category page, select the ID.
Supplier ID	If this link is to a category on the supplier's website, select a supplier ID.
Category Code	If this link is to a category on the supplier's website, select a category code.

Defining Category Codes

Access the Discounts and Perks Category Setup page.

Discounts and Perks Category Setup

BeyondWork

View All First ◀ 1 of 1 ▶ Last

*Category Code: + -


View All First ◀ 1 of 1 ▶ Last

*Effective Date: *Status: + -

Group ID:

*Description:

*Link Text:

Image Name: 

Link Descr:

Discounts and Perks Category Setup page


Category Code	Enter the supplier's category code.
Group ID	Controls the display of the supplier link on a page. If you want to limit access to this supplier category to specific groups of employees, select a group ID. This overrides the group ID entered on the Discounts and Perks Supplier Setup page.
Description	Enter a general description of the category code. This text does not appear on any page.
Link Text	Enter the text (up to 30 characters) that you want to appear as the actual link.
Image Name	If you want an icon to appear on the page next to the link text, select an image name. This image appears on Category pages, the Benefit Enrollment Confirmation page, and the Life Event Confirmation page.
Link Description	This description appears on category pages, the eBenefits enrollment confirmation page, or a life event confirmation page. Use this field if you want text to appear below the Link Text. This text can be as long as you want.

Creating Category Pages

Access the Discounts and Perks Category Page Definition page.

Discounts and Perks Category Page Definition

Page ID: DISCOUNTS

Page Definition		View All	First	1 of 1	Last
*Effective Date:	<input type="text" value="01/01/2001"/>	*Status:	<input type="text" value="Active"/>	<input type="button" value="+"/> <input type="button" value="-"/>	
*Page Title:	<input type="text" value="Discounts and Perks Home Page"/>				
Image Name:	<input type="text" value="PS_BEYONDWORK_ICN"/>				
Link Descr:	<input type="text" value="This text will display below the page title, Discounts and Perks Home Page."/>				
Page Links		View All	First	1 of 1	Last
*Sequence Nbr:	<input type="text" value="1"/>	<input type="button" value="+"/> <input type="button" value="-"/>			
Page ID:	<input type="text"/>				
Merchant ID:	<input type="text" value="BEYONDWORK"/>	<input type="text" value="BeyondWork"/>			
Category Code:	<input type="text" value="TRAVEL"/>				

Discounts and Perks Category Page Definition page

- Page Title** Enter the name of the page exactly as you want it to appear on the page.
- Image Name** Select the logo you want to appear on the page.
- Link Description** Enter a description of the page exactly as you want it to appear on the page.
- Page Links** Add as many links as you want. Links are placed on the page in the following ordering scheme:
- | | |
|---|---|
| 1 | 2 |
| 3 | 4 |
| 5 | 6 |

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