

PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook

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Glossary

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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.

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.

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 ***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.

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.

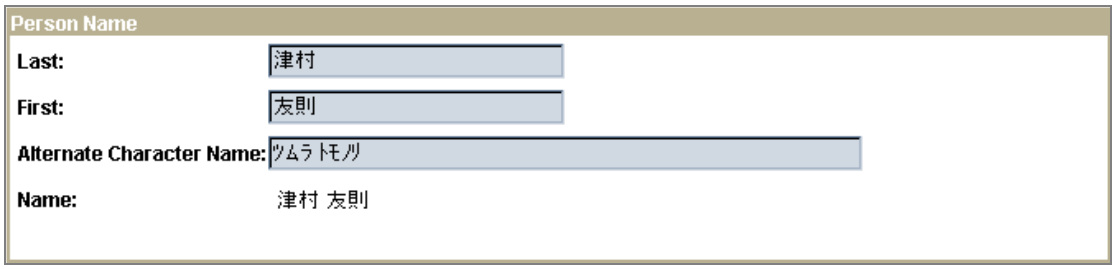
Royal Suffix — Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.

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.



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.

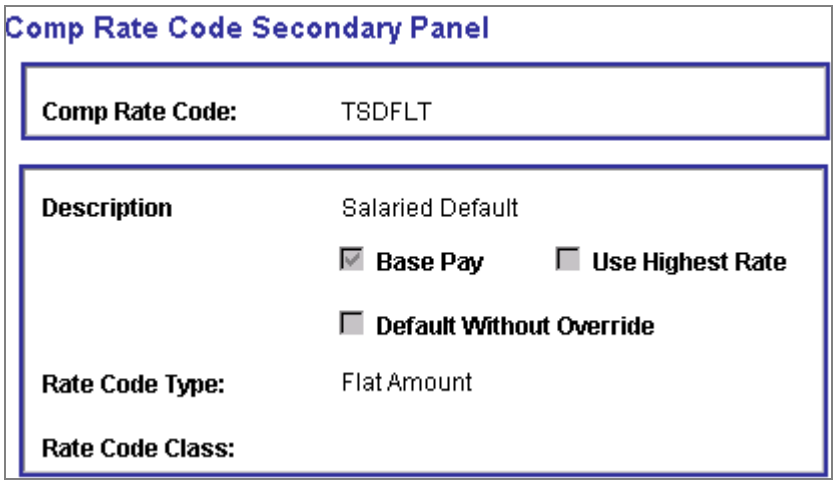
Entering or Viewing Pay Components

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.



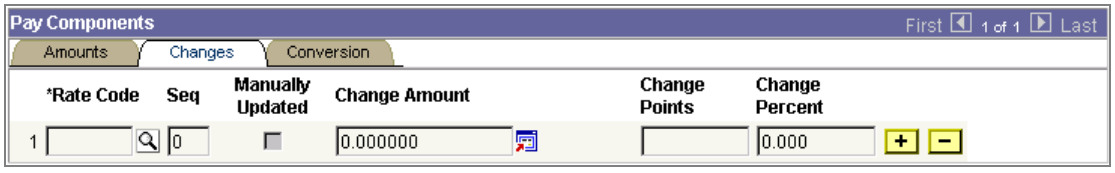
Comp Rate Code Secondary Panel

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 – Changes page

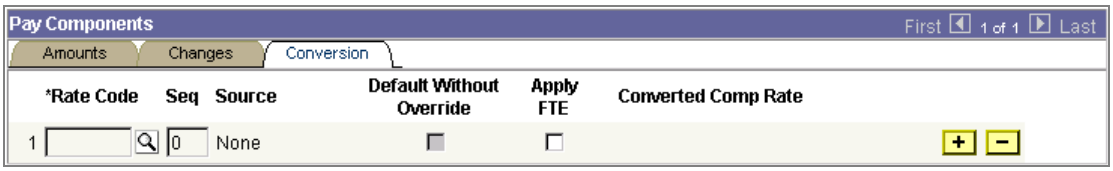
This page displays the change in an employee's salary.

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 – Conversion

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

Source The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.

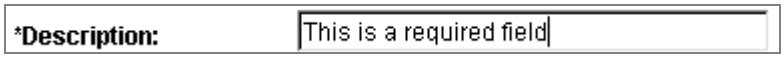
Default Without Override Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.

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.



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**).
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.
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 Application Fundamentals for HRMS PeopleBook

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

This preface complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About These PeopleBooks. It provides information about the following topics:

- Using related documentation such as the PeopleSoft 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 These PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists 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 Application Fundamentals for HRMS PeopleBook*.

Note. Each PeopleBook has a unique SKU for ordering purposes. The SKU for the *PeopleSoft Human Resources PeopleBook* is mentioned in the beginning of this section.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks"

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.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Documentation

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.

CHAPTER 2

Regulating PeopleSoft HRMS System Data

This chapter provides an overview of regulating PeopleSoft HRMS data and tells you how to:

- Organize your businesses by dividing them into logical units, using business units and setIDs.
- Implement business units.
- Implement TableSet sharing.
- Link system defaults to your business units.
- Set up primary permission list preferences.

Understanding HRMS System Data Regulation

As companies grow larger and more complex, they often need to collect the same type of data across many locations. Using PeopleSoft business units and setIDs, you can organize your businesses by dividing them into logical units other than companies and departments. You can also control, or regulate, how you share your organizational data among those units.

Business Units

Business units are logical units that you create within your organization for reporting purposes and that don't have any predetermined restrictions or requirements. Business units enable you to 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 needs of your internal human resources departments or the business structure of your enterprise. For example, your business units might be companies, agencies, subsidiaries, divisions, departments, or branch offices. Or you might want a single business unit to represent your entire organization.

TableSets and SetIDs

- TableSets

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. 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. Sharing TableSets among business units enables you to centralize redundant information while keeping 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 behave throughout PeopleSoft HRMS.

- SetIDs

Just as business units organize your company or organization, SetIDs help organize your data within the system. PeopleSoft HRMS uses tables (control tables and prompt tables) that use a high-level key that enables you to identify and retrieve data from the system. A secondary high-level key, called a *SetID,* has also been added to various tables. SetIDs are the labels that identify a TableSet. Business unit and setID functionality in PeopleSoft HRMS provides a higher business level for reporting purposes and other business data rollup.

Before You Begin

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

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

Table	***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.

Determining Your Business Unit Structure

Because PeopleSoft HRMS doesn't offer any predetermined definition for a business unit (as it does for a department and a company), you can decide how to 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 in just one PeopleSoft application.

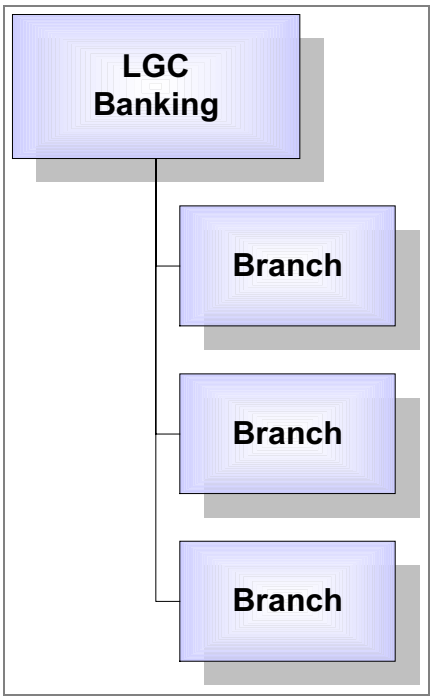
Your entire organization may have only one business unit, if every department uses the same processing rules. But multinational or otherwise diversified companies, such as those that have multiple cost centers, divisions, or subsidiaries, usually have multiple business units.

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.

Note. The SetID segregates the data in the control tables. Therefore, many business units can share the same set of data on the physical table in your human resources system.

Defining a Business Unit

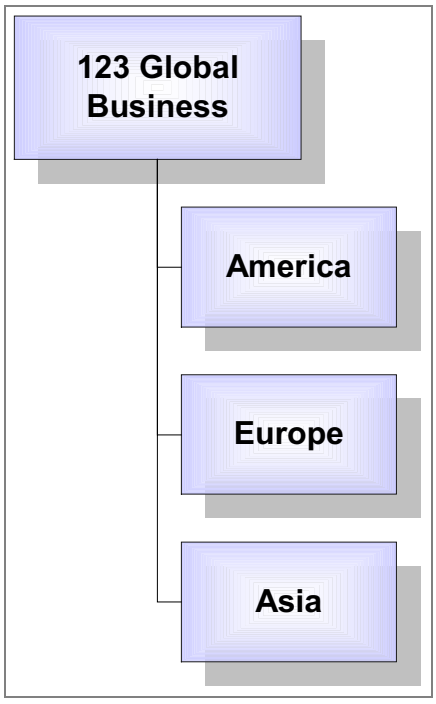
How you define a business unit depends on your industry, statutory requirements, regulatory reporting demands, or how you've organized operating responsibilities. For example, a bank might treat each branch as a business unit, which would mean that the bank could do reporting for its people within each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



Identifying business units for a bank

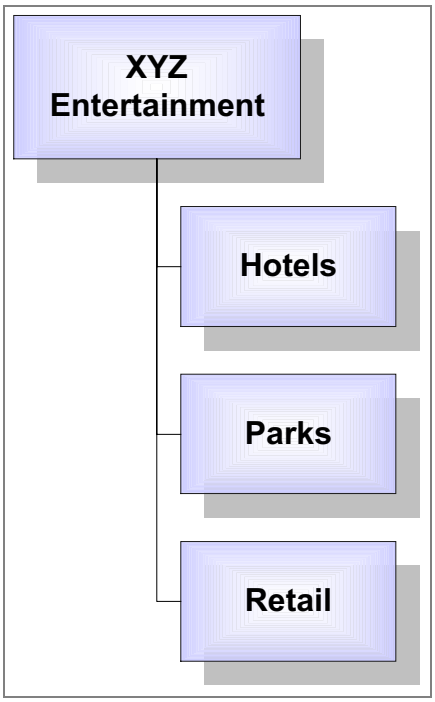
Another example might be an organization that's global. Multinational companies might separate their operations geographically because of the necessities of conducting business

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 market? Then they can track their business requirements and business needs accordingly.



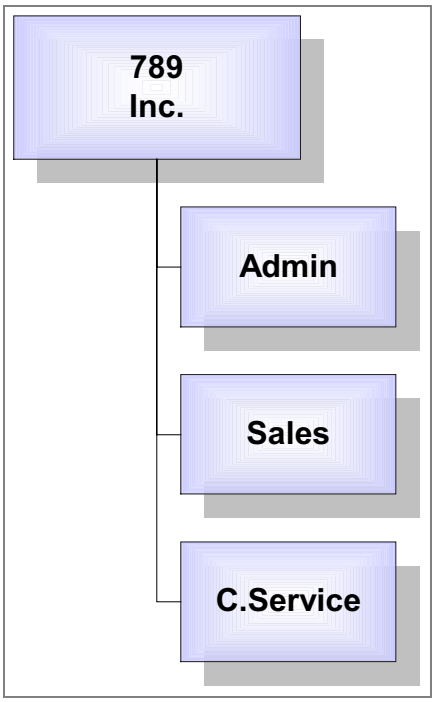
Identifying business units for a global organization

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



Identifying business units for an organization with subsidiary companies

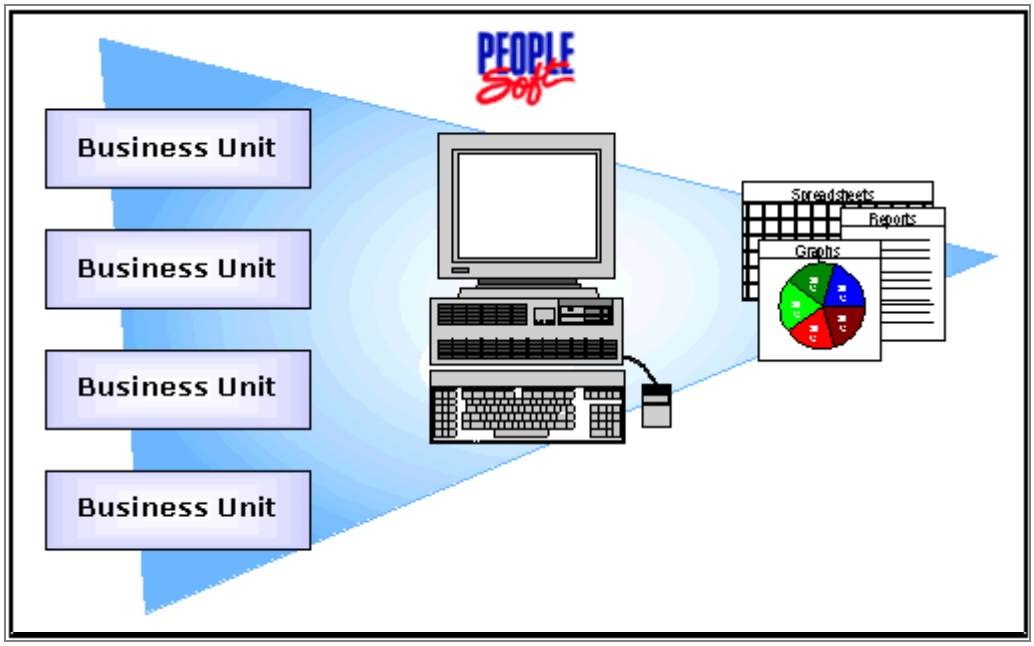
Some organizations may want to organize information by functionality or purpose, such as what's going on in Sales versus Customer Service. You can create business units that reflect the administrative needs of your human resources, benefits, and payroll departments.



Identifying business units by 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 that interfaces with and manages 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 each unit to manage its own human resources information independently, while sharing data with a central, parent business unit.

While each business unit maintains its own human resources information, your organization can maintain a single, centralized database, reducing the effort of maintaining redundant information for each business unit. More importantly, you can produce reports across business units, enabling you to see the big picture and to compare 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 the 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 is divided into these logical units." Then you might reconsider from another perspective, asking, "Is this structure going to hold up for the other types of business decisions that 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 might choose to have multiple business units, even though you don't need to: Setting up multiple business units in such situations 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 with 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 is for a department and a 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 rollup data collection.

See Also

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 can offer important reporting and data control options, as follows:

- Maintain a tree structure to facilitate organization-specific, rollup 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 useful for controlling data flow across different parts of the enterprise.

Note. 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 that you might encounter as you define your business unit structures. But once you've mulled over the ideas that we've outlined, 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 that this wouldn't work?
- Will this preclude me from taking advantage of some functionality that I might want to use?
- Will this restrict my reporting options?
- Will this cause me to process more than I want to process on any particular night?
- Is this just right?

Note. You want to work closely with your PeopleSoft implementation partner early in your design to determine how best to define the business units for your PeopleSoft HRMS system.

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.

Warning! You must define at least one complete set of these tables (a 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 TableSet Controls component (Utilities menu).

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 to identify which data should be shared and how it should be shared for each business unit.

See Also

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities," TableSet Control – Record Group

PeopleTools PeopleBook: Application Designer, "Planning Records, Control Tables, and TableSets," Defining TableSet Controls

Understanding the Relationship Between SetIDs and TableSets

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

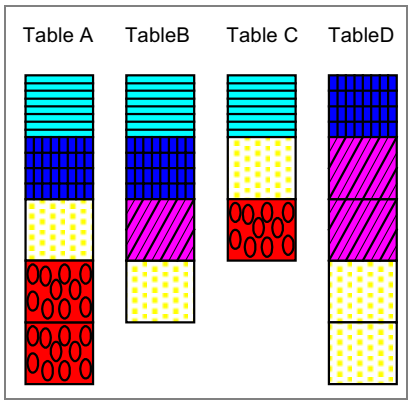
Department ID	***Description***
00001	Branch Administration
00002	Canadian Sales
00002	U.S. Sales
00003	Customer Service
00004	Distribution
00005	Operations

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

Note. 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 that are identified by the same SetID. In other words, all rows of data in your control tables that are keyed by the same SetID compose a TableSet. When you want to look up U.S. information, enter the highest-level key or SetID for the U.S. to retrieve all the rows that are 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 that are identified by the same SetID. You 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 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 enables 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 the following choices:

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

See Also

Adding and Updating Business Units

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 a 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, even though all the code values 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, the job codes you see are different from the ones you would see if you had assigned the employee to a company in the U.S. business unit, even though all of the U.S. and CANADA job codes reside on a single Job Code table.

Note. 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 PeopleSoft HRMS system. When you hire an employee, you assign a business unit in PeopleSoft Human Resources on the Work Location page (Hire menu).

See Also

PeopleSoft Human Resources PeopleBook: Recruit 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.

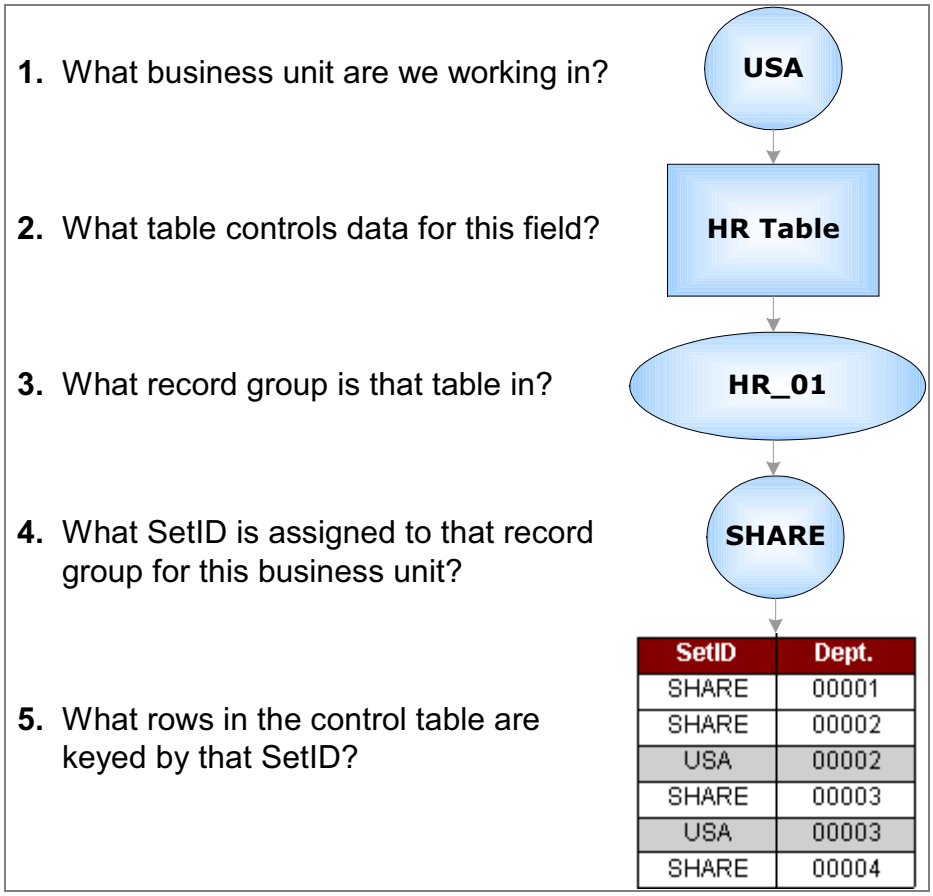
Example: Using Business Unit/SetID to Control Information Flow

For example, your organization has 10 business units with the same job codes. 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 9 of your 10 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 for this to happen:

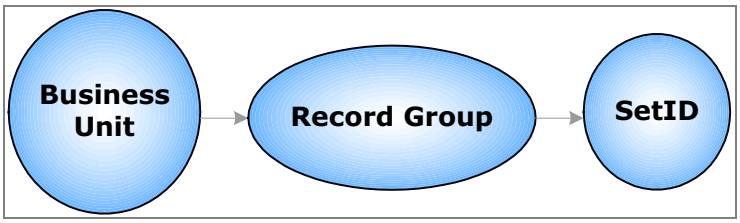


TableSet sharing process

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

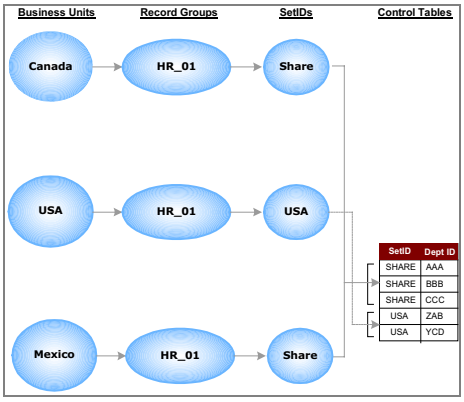
TableSet sharing is a time-saver, a way to share redundant information among business units. The key to sharing that information is defining what data is available under specific circumstances. To do this, you use SetIDs. TableSet sharing consists of assigning specific SetIDs to specific record groups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

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



Assigning specific SetIDs to specific record groups

In questions 4 and 5 in our example, the data from the control tables that is valid in any situation depends on the SetID that has been assigned to a 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 business unit.



TableSet sharing

TableSet sharing is easy for an organization to design. In fact, it is almost entirely set up by the time you finish creating your business units. Most of the setup happens behind the scenes and isn't obvious. When you create a business unit, that business unit and a default SetID are automatically linked to each record group in the system that you are using.

When TableSet Sharing Doesn't Help

Sometimes you may 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 wouldn't be useful, and it would be more efficient to enter each job code into the Job Codes table for each SetID.

Understanding Default Values in Records That Reference Multiple SetIDs

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

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

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

For example, let's look at DEPT_TBL that has SETID in the key, along with the DEPTID (department ID). 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? You can set the system to display all SetIDs for the Location table or you can limit the choices. Showing all SetIDs (and all Location values) often creates situations where the Location value that the user selects is not correct for a certain business unit when it is defaulted in at runtime. 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
	LOCATION	RUSS

In this example, when a department is part of the 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, and business units, the location that the system defaults into the page is invalid.

Because you can't predict what the business unit in the transaction table will be, you establish the group of SetIDs with which the business unit can be associated. The system won't default 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 Defaults Across the Transaction Record

Let's look at the JOB_DATA table that has a default Business Unit/SetID that is associated with the employee on the Work Location page. The default business unit here controls the prompt values that are displayed when you select a department on the Work Location page, based on the SetIDs that are associated with that business unit on the TableSet Record Control page. The department that you select 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 select 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 the following 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	*Location Table*
SetID = USA	SetID = USA

Department Table	*Location Table*
Department = 10100	Location = 001
Location SetID = USA	Default SetID = USA
Location = 001	Salary Plan = CCB

Given the preceding 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 Work Location page (Hire menu), the employee's Business Unit default is *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 that are associated with the SetID *USA,* as defined on the TableSet Record Control table.

You select *Department 10100 USA* (a department selected from the departments with the 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 a 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 the valid SetIDs for the PDEV Location Record Group on the TableSet Record Group Control table.

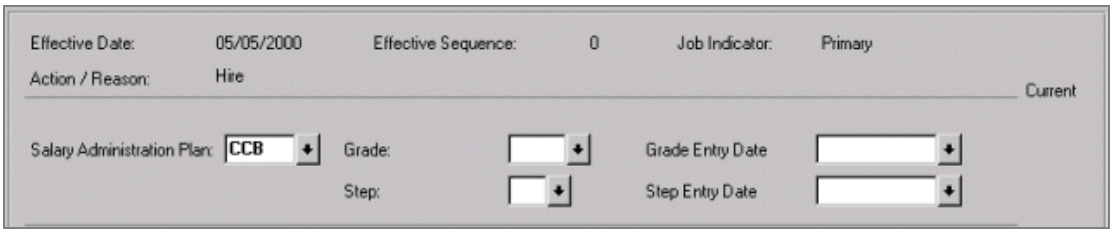
However, because *USA* is a valid SetID for the PDEV Location Record Group, the system inserts the default location for *Department 10100 USA,* as defined on the Location table–in this case, Location 001, Corp (Corporate) HQ.



Department and Location defaults based on the 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 field 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 does not insert a default value 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.

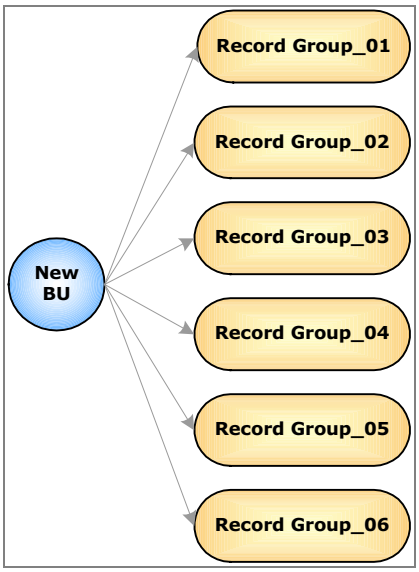


Default salary plan on the Compensation Page based on the Location field on the Job Location page

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 that you are using. This is the beginning of TableSet sharing.



The beginning of TableSet sharing

Implementing TableSet Sharing

For the purpose of TableSet sharing, the control tables PeopleSoft applications use are divided into record groups, which serves two purposes:

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

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

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 use pages in both PeopleSoft HRMS and within PeopleTools.

To establish TableSet sharing:

1. Define SetIDs for your organization on the TableSet ID page.
2. Define record groups on the Record Groups page.

   Record groups are predefined for your PeopleSoft HRMS system. All predefined PeopleSoft 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.
3. Set up business units to reflect your organization's structure on the Business Unit page.
4. Update all your TableSet record group controls on the Record Group page.

To link TableSet sharing and system defaults to permission lists and/or business units:

1. Set up preferences on the Primary PrmList Preferences page (required).
2. Set up defaults on the Business Unit Options Default page (optional).

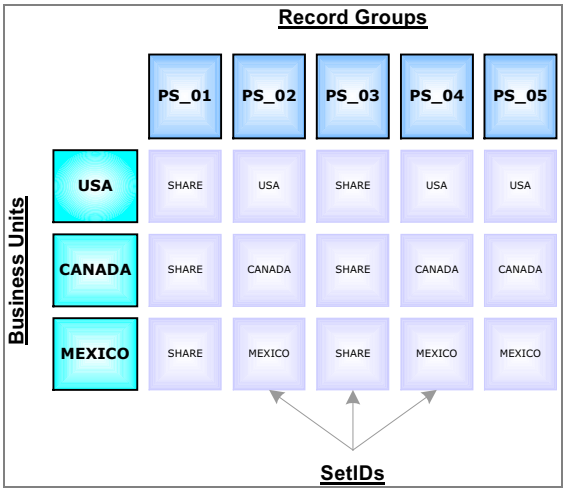
See Also

PeopleTools PeopleBook: Data Management, "PeopleSoft Utilities"

Adding or Updating SetIDs

If you want to use multiple SetIDs to set up TableSet sharing for the first business unit you create (before you create any additional business units), create SetIDs on the TableSet ID 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 section, 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

Warning! To optimize system performance, your SetIDs must contain five characters. If your SetIDs or business units have fewer than five characters, you will experience serious performance degradation.

Adding, Updating, and Identifying Business Units

You can add and update business units in PeopleSoft HRMS as well as identify units in other PeopleSoft applications.

Understanding Enterprise Integration Points

The Business Unit Table HR enterprise integration point (EIP) determines if a business unit exists in the business unit table. If the business unit does exist the EIP will populate the description work fields in the Business Unit component. If the business unit does not exist the EIP will add the business unit you enter in the Business Unit component to the business unit table.

See Also

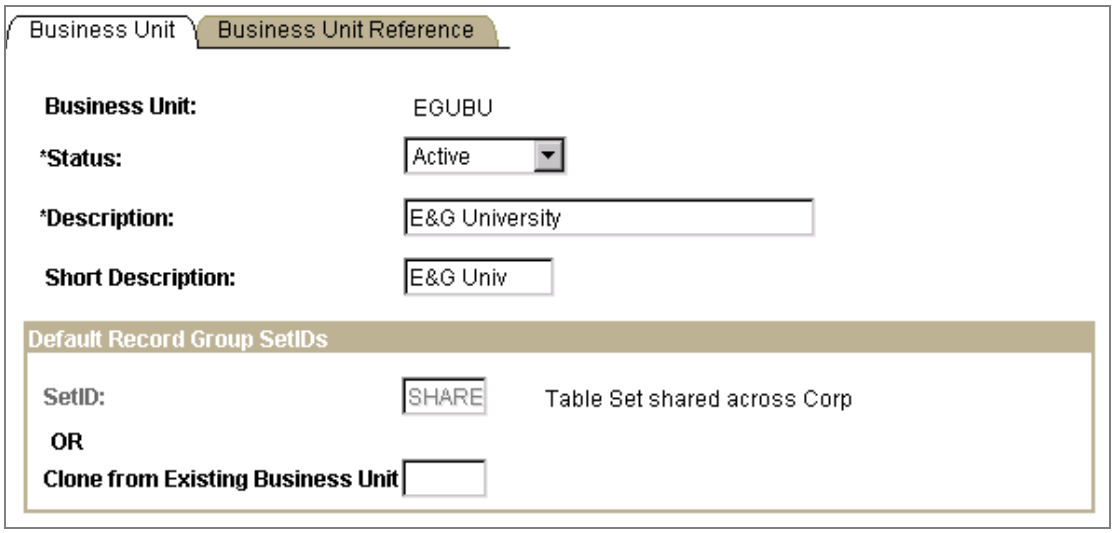
PeopleSoft Enterprise Integration PeopleBook

Pages Used to Add or Update Business Units

Page Name	Object Name	Navigation	Usage
Business Unit - Business Unit	BUS_UNIT_TBL_HR	Define Business Rules, Manage Human Resources (GBL) Setup, Business Unit, Business Unit Define Business Rules, Manage Human Resources (USF) Setup, Business Unit, Business Unit	Add or update business units.
Business Unit - Business Unit Reference	BUS_UNIT_TBL_HR2	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	Identify business units in other PeopleSoft applications that are related to a business unit.

Adding and Updating Business Units

Access the Business Unit page.



Business Unit -Business Unit page

Warning! To optimize system performance, your business units must be 5 characters. If your SetIDs or business units have fewer than five characters, you will experience serious performance degradation.

Status

Select ***Active*** or ***Inactive.*** If you select ***Inactive,*** the business unit won't appear in any business unit lists in PeopleSoft HRMS.

Note. Business units aren't effective-dated, so use this field to implement or retire business units.

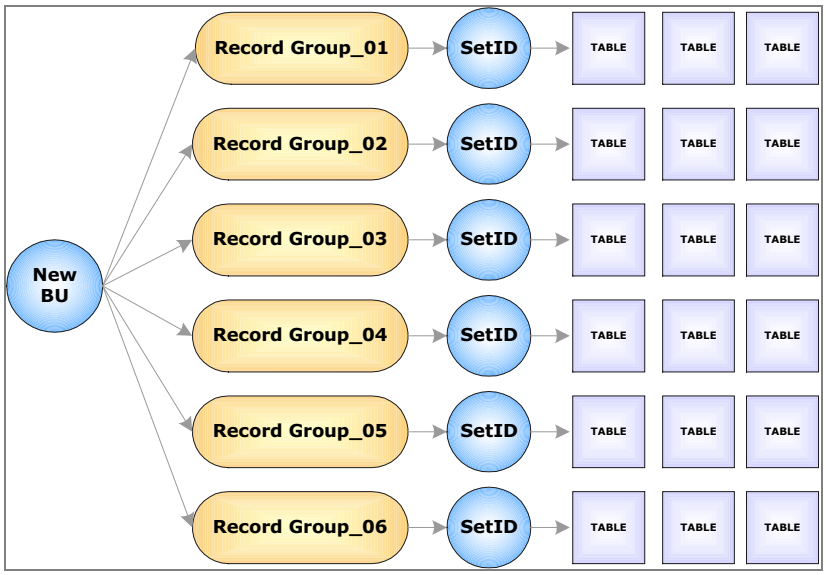
Understanding Your TableSet Sharing Options

Default Record Group 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 options in this group box. The **SetID** or **Clone from Existing Business Unit** value that you enter determines your preliminary TableSet sharing setup for the new business unit by determining the SetIDs that are assigned to each record group for the new business unit. The SetID assigned to a record group determines which TableSet is used as valid values for that business unit.



Default record group SetID options on the Business Unit table



TableSet sharing

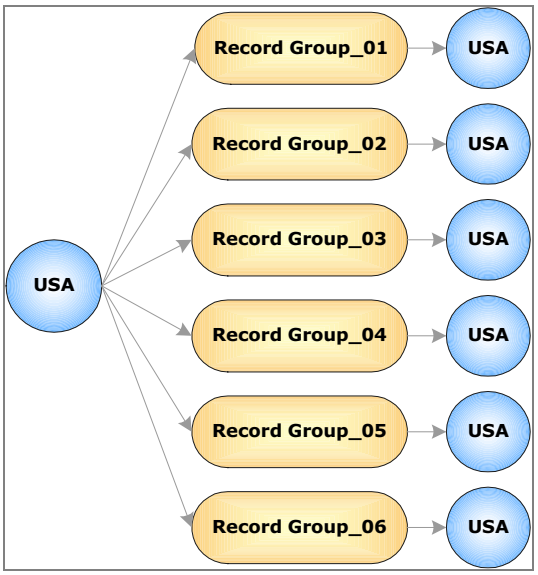
Establishing a TableSet Sharing Setup Using One Default SetID

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, enter the default SetID that you want to use.

When you add a new business unit to the system, the system populates the SetID field with a SetID name that is the same as your new business unit. For example, if your business unit is called USA, then the SetID defaults to *USA*. You can override the default SetID as necessary.

Note. 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.



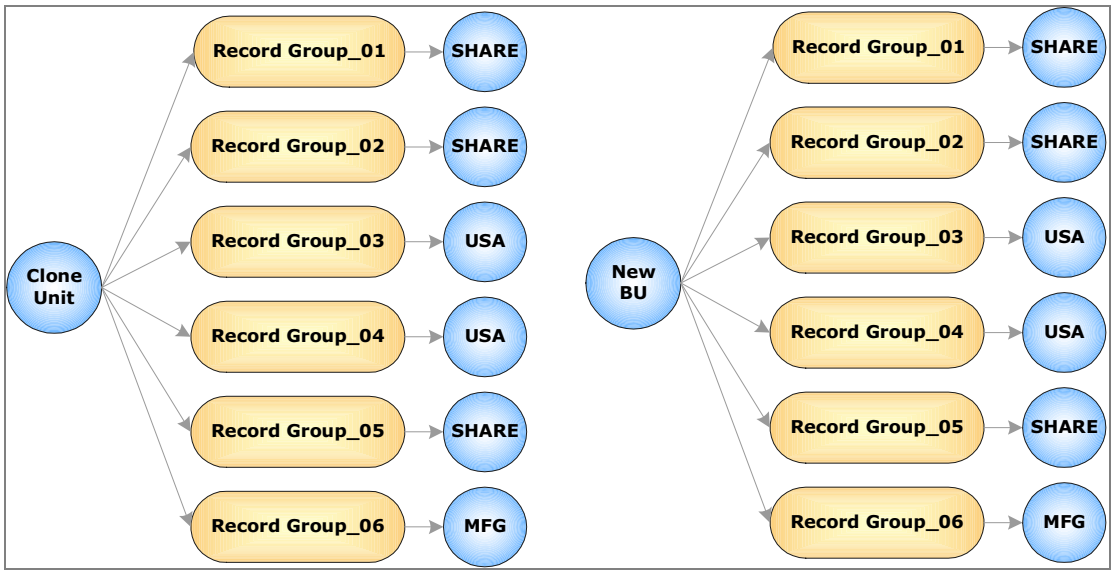
TableSet sharing using a default SetID

Cloning TableSet Setup From Existing Business Units

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

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

If you want the TableSet sharing for the new business unit that you are creating to mirror that of another business unit you've defined, or if you want the two units to be similar except for a few record groups, enter the business unit that you want to mirror as the Clone Unit. When the record groups are linked to the new business unit, the system assigns each record group the same SetID that is used for the record group by the business unit that you selected as the Clone Unit.



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.

Note. When you add a new business unit and save the page, the system creates all the appropriate table values provided by PeopleTools that connect the business unit ID, the record group ID, and the SetID.

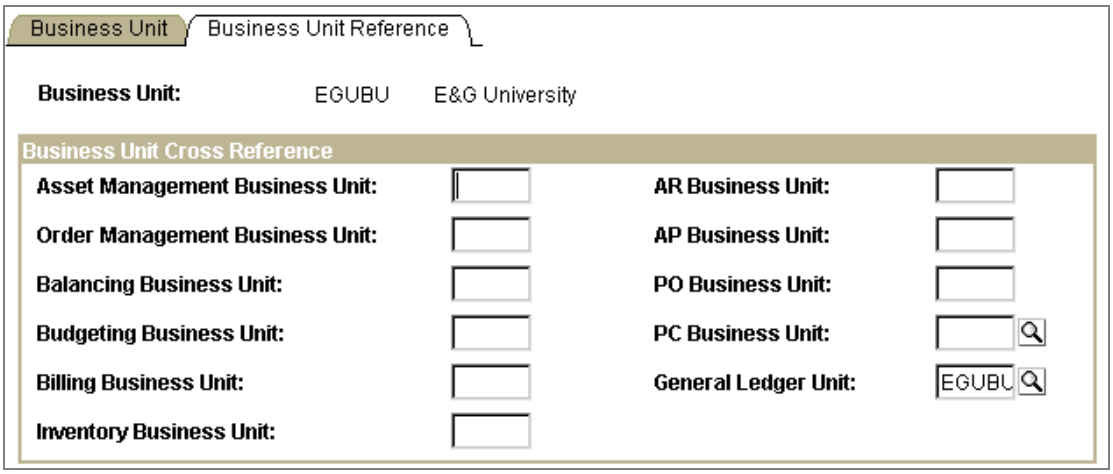
TableSet sharing is set up as soon as you create your business units. However, the sharing, especially if you have chosen to create a TableSet sharing setup using one default SetID, may need some fine-tuning. You can do this by changing the SetIDs that are assigned to individual record groups on the TableSet Control – Record Group page. The system uses the default SetID on this page when you add record groups.

See Also

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities," TableSet Control – Record Group

Identifying Business Units in Other Applications

Access the Business Unit - Business Unit Reference page.



Business Unit - Business Unit Reference page

Business Unit Cross Reference In this group box, enter the business unit cross reference, if applicable, for any PeopleSoft application that is listed on the page. You identify other business units in other PeopleSoft applications that relate to your business unit.

Note. You can review which PeopleSoft General Ledger units are associated with the PeopleSoft HRMS business units on the Business Units Links Details. The HRMS Commitment Accounting business process 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 are 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, and Standard Hours, for each permission list.
- Control which default values are 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 the tables and pages throughout PeopleSoft Human Resources, the defaults for country and currency (to name just a couple of options) populate 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 Preference table for your primary permission lists in PeopleSoft Human Resources, setting up the Business Unit HR Defaults table is optional.

Note. Before you can link default values to specific permission lists, define the permission lists in PeopleSoft HRMS.

See Also

Understanding How the System Determines Default Values

PeopleTools PeopleBook: Security, "Working With Permission Lists"

"Administering PeopleSoft Security"

Setting Up Primary Permission List Preferences

Why Define Business Unit HR Defaults?

The first time you open a system page, with or without a business unit being associated with it, the 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. These defaults 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 that, the system finds the business unit (set control value) on the TableSet Control – Record Group page. The system checks to see 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 defaults on the Business Unit HR Defaults table makes sense when you have multiple business units that share the same kind of defaults; but shared defaults are not readily organized by permission list. If this is the case, you can predetermine system defaults 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 Defaults

Most of the page-level defaults in the PeopleSoft HRMS system are based on permission list as opposed to business unit. Business unit-based defaults in PeopleSoft HRMS work as follows:

1. The system retrieves the SetID for the specified business unit, as defined in the HR_06 record group.

2. Once the system has the SetID for that business unit, the system can retrieve the correct data row of default values for that unit, because the Business Unit HR Defaults table is keyed by SetID.

In this way, many business units can share the same default values.

Permission list-based defaults have one set of defaults for one permission list. The default SetID and business unit for a permission list are normally used to populate values in the relevant fields (for example Business Unit and SetID) on pages and in dialog boxes throughout your system.

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

See Also

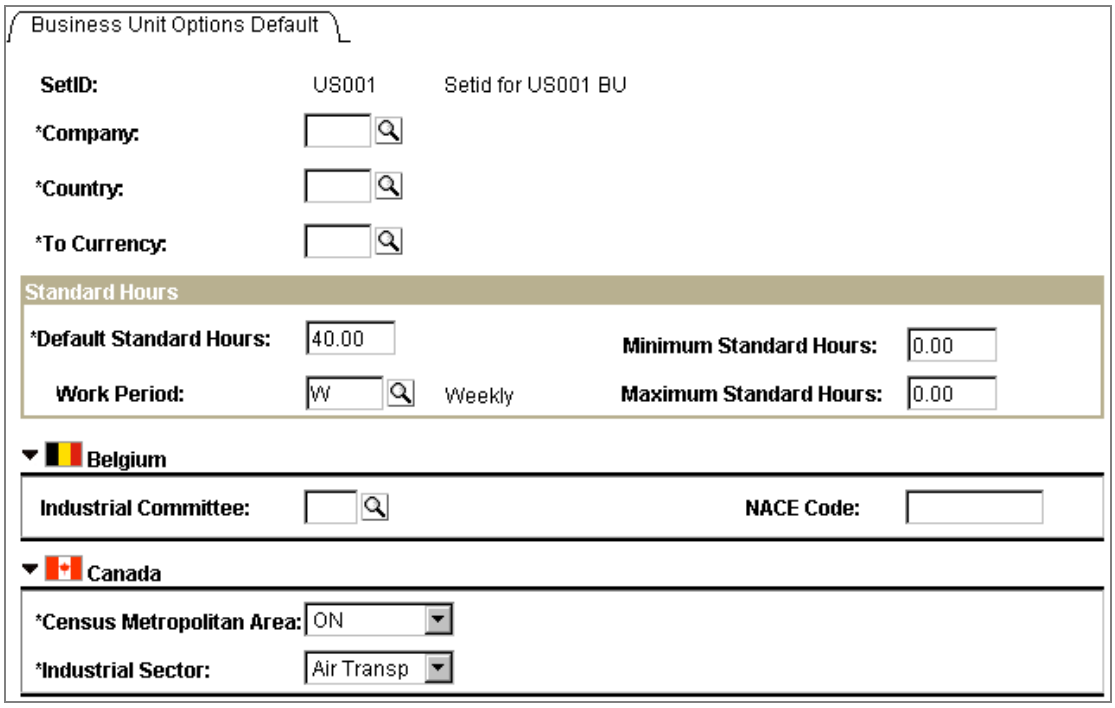
PeopleTools PeopleBook: Data Management, "PeopleTools Utilities," TableSet Control – Record Group

Page Used to Set System Defaults

Page Name	*Object Name*	*Navigation*	*Usage*
Business Unit Options Default	BUS_UNIT_OPT_HR	Define Business Rules, Define General Options, Setup, Business Unit HR Defaults, Business Unit Options Default	Set system defaults such as Company, Country, and Currency for a specific SetID.

Setting System Defaults

Access the Business Unit Options Default page.



Business Unit Options Default page

By setting up default values for a SetID, you can specify the default values that populate these fields in your human resources system. Because the SetID keys the Business Unit HR Default table, you can share these defaults among multiple business units.

Warning! The values that you enter or select on this page affect the default values throughout your PeopleSoft HRMS system.

Standard Hours

Default Standard Hours The default is ***40*** hours. The value that you enter affects how the human resources system calculates FTE (full-time equivalency) for workers and how it affects compensation processing.

Work Period Enter a standard work period (the time period in which employees must complete the standard hours).

The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency).

Minimum Standard Hours Enter the default minimum standard hours for this SetID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

Maximum Standard Hours	Enter the default maximum standard hours for this SetID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

(BEL) Belgium

Industrial Committee	Select the appropriate industrial committee for the company. This can be overwritten at the department level if necessary.
NACE Code	Enter the NACE code for the company. Note: You can choose the level of detail for the NACE Code. It can range from 5 digits for group level, 6 for class level and 7 for subclass level.

(CAN) Canada

Census Metropolitan Area	Select a metropolitan area.
Industrial Sector	Select an industrial sector.

Note. These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

See Also

"Setting Up PeopleSoft HRMS," Selecting HRMS Options

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

Understanding TableSets

"Working With Currencies"

"Setting Up PeopleSoft HRMS," Administering Country Codes

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. Primary permission lists are assigned to the user on the User Profile – General page. 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 who is associated with that permission list logs in to PeopleSoft HRMS. Primary permission lists also control user access to country functionality, as determined on the Maintain Global Security – Global Panels page.

See Also

PeopleSoft Security PeopleBook, "Working With Permission Lists"

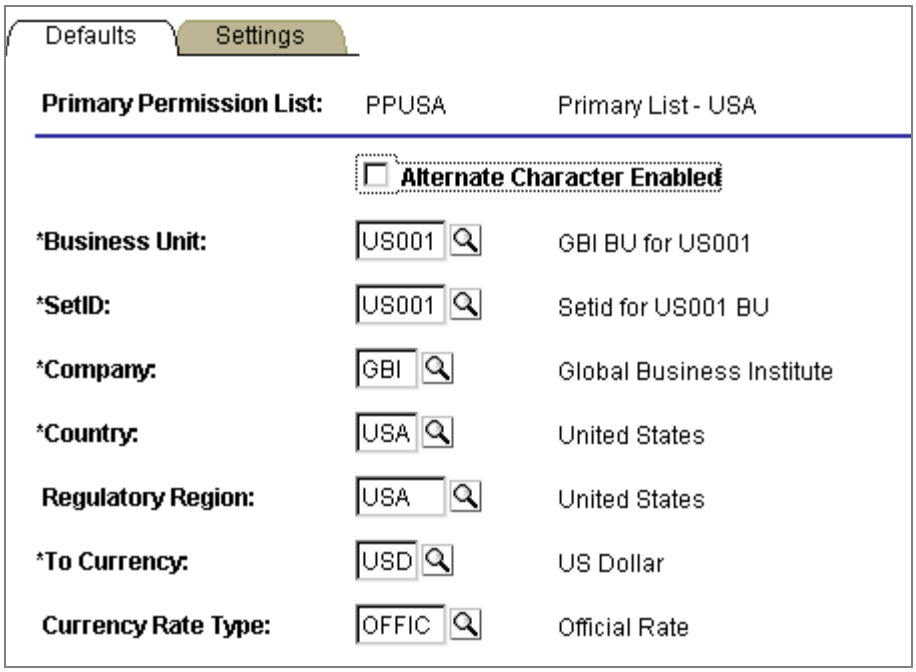
"Administering PeopleSoft Security "

Pages Used to Set Defaults for Permission Lists

Page Name	*Object Name*	*Navigation*	*Usage*
Primary Permission List Preferences - Defaults	OPR_DEF_TBL_HR	Define Business Rules, Define General Options, Setup, Primary PrmList Preferences, Defaults	Set predefined TableSet sharing and system-wide defaults for each of your primary permission lists.
Primary Permission List Preferences - Settings	OPR_DEF_TBL_HR2	Define Business Rules, Define General Options, Setup, Primary PrmList Preferences, Settings	Set Payroll System and system-wide defaults for each of your permission lists.

Setting TableSet Sharing Defaults

Access the Primary Permission List Preferences - Defaults page.



Primary Permission List Preferences - Defaults page

You can tailor your PeopleSoft HRMS system for each of your users, controlling the default values that users see on pages in the system.

Note. The TableSet Record Group Control table regulates what users see on the prompt tables in PeopleSoft HRMS. These defaults override the defaults that you set for these options on the Installation table for this permission list.

Alternate Character Enabled	Select to enable alternate character searching for this permission list.

Warning! The **SetID** field value that you select affects the business unit and SetID defaults for this permission list throughout your PeopleSoft HRMS system.

See Also

"Working With Languages," Working With Double-Byte Characters

Understanding TableSets

"Setting Up PeopleSoft HRMS," Administering Country Codes

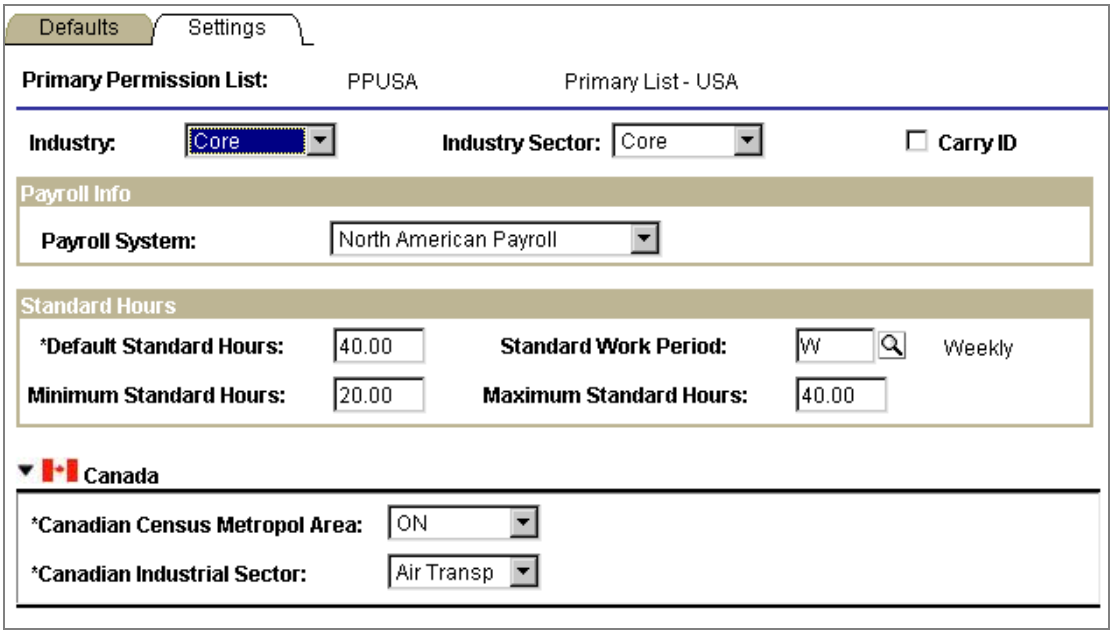
"Processing Transactions Using Regulatory Regions "

"Working With Currencies "

PeopleTools PeopleBook: Security, "Understanding PeopleSoft Security"

Setting Payroll System Defaults

Access the Primary Permission List Preferences - Settings page.



Primary Permission List Preferences - Settings page

You can tailor your PeopleSoft HRMS system for each permission list, thus controlling the default values that users see on the system pages.

Industry Select ***Government*** if this is a U.S. federal government database. The default value is ***Core.***

Industry Sector Select ***US Federal*** if this is a U.S. federal government database. The default value is ***Core.***

Carry ID Select to carry the EmplID (employee ID) search key information across menus. When you select this check box, the system uses the EmplID search key that you are currently using on subsequent menus.

Note. You must select an **Industry** of ***Government*** and an **Industry Sector** of ***US Federal*** to fully utilize U.S. federal government functionality in your database. In addition, you need to select Federal on the Installation Table - Products page.

See Also

"Setting Up PeopleSoft HRMS," Setting Up Implementation Defaults

Specifying a Default Payroll System

Payroll System Select the default payroll system. When you select a payroll system on a table or page in PeopleSoft HRMS, the system displays ***North American, Global,*** or neither one based on the choice you enter here for this permission list. The user can override this default, as necessary.

Setting Default Standard Hours

Default Standard Hours The default is ***40*** hours. The value that you enter here affects how the human resources system calculates FTE (full-time equivalency) for workers and affects compensation processing.

Standard Work Period Select a standard work period. The standard work period is the time period in which employees must complete the standard hours.

The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency).

Minimum Standard Hours Enter the default minimum standard hours for this SetID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

Maximum Standard Hours Enter the default maximum standard hours for this SetID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

See Also

"Setting Up PeopleSoft HRMS," Selecting HRMS Options

(CAN) Canada

Canadian Census Metropol Area (Canadian census metropolitan area) Select from the metropolitan areas defined on the Translate table.

Canadian Industrial Sector Select from the list of values on the Translate table.

(CAN) Note. These values affect Canadian regulatory reporting in PeopleSoft Human Resources.

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

Understanding How the System Determines Default Values

To see how the system checks for default values, based on the information that you 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*
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.
An EmplID (employee ID) value but no Business Unit value is on the page.	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).
No Business Unit and no EmplID are on the page.	Default values are based on defaults from the Primary Permission List Preferences table (OPR_DEF_TBL_HR).

Situation on the Page	*How the System Determines Defaults*
A SetID is on the page without Business Unit and EmplID values. (This is the situation on most setup and control tables, such as the Location and Department tables.)	Default values are based on defaults from the Primary Permission List Preferences table (OPR_DEF_TBL_HR).

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

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

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 is not 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 table
- Plan Salaries table
- Absence Types table
- Health & Safety table
- Contract Type table

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

Business Unit Process Tables

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

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

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

See Also

Processing Transactions Using Regulatory Regions

Understanding How Business Units Affect 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 an 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 would be in two different job codes and in two different business units (UNI and ADMIN) simultaneously. The only requirement is that the concurrent jobs be in different Employment Record Numbers.

Note. 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.

CHAPTER 3

Processing Transactions Using Regulatory Regions

This chapter provides an overview of regulatory regions and tells you how to:

- Set up regulatory regions in PeopleSoft Human Resources.
- Set up additional regulatory regions.

Understanding Regulatory Regions

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

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

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

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

- An employee officially works in the U.S., but has a health and safety-related incident occur during a business trip in Canada. Using Regulatory Region in the Incident Details component, your operators work with incident data and codes (body parts, dangerous occurrences, diagnosis codes, and so forth), that are applicable to the country in which the incident occurred.

- Your organization has implemented PeopleSoft Benefits Administration and would like to use its automatic eligibility processing capabilities to determine the benefits enrollment options for your U.S. and Canadian employees. Because benefits rules in Canada and the United States vary, you can use the Regulatory Region on the Eligibility Rules table to set up two sets of benefits eligibility rules: one set for your Canadian employees and another for your U.S. employees.

See Also

PeopleSoft Benefits Administration PeopleBook, "Defining Eligibility Rules"

Understanding Regulatory Region Table Relationships

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

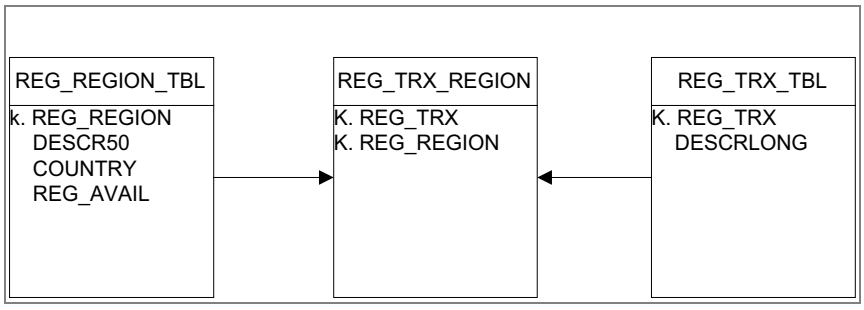
- Regulatory Region
- Transaction
- Regions in Transaction

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

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

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

The following diagram shows 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 by either making the REG_AVAIL = NOT or removing it from the transaction's region list.

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

Setting Up Regulatory Regions

We've already defined the 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. You can modify the regulatory regions that we've defined as templates, to meet your organization's business process needs.

Note. 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.

Establishing Regulatory Regions

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

Note. You don't have to create new regulatory regions. You create new regulatory regions only if there is a special need, perhaps to accommodate specific local regulations. You do have to use the existing regulatory regions that are already in the system. If you have operations in only one country, and you want to limit the impact of Regulatory Region on your data entry operators, then you can assign your one 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.

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

- For new country-level regulatory regions, use the 3-character, ISO-certified country code found in the Country Table.

- For regions that are smaller than a country, use the 3-character country code and concatenate a 2-character unique regional identifier. For example, use *CCCSS* for state-level or province-level regions, where *CCC* is the country code and *SS* is the state or province code. Using this system, the regulatory region code for Canada - British Columbia is *CANBC*.

See Also

Associating a Regulatory Region With a Transaction

Understanding Enterprise Integration Points

When you save changes to the Regulatory Region Table, it publishes uses the Regulatory Region Table enterprise integration point (EIP). After HR publishes the data, other products can subscribe to the data for incorporation into their own data, keeping regulatory region codes synchronized across applications.

See Also

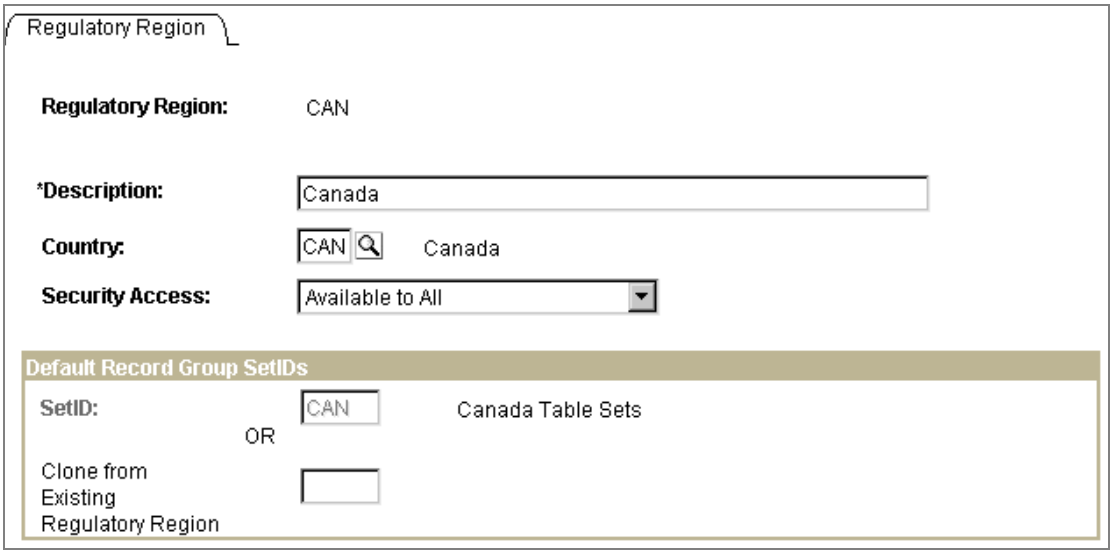
PeopleSoft Enterprise Integration PeopleBook

Page Used to Set Up Regulatory Regions

Page Name	*Object Name*	*Navigation*	*Usage*
Regulatory Region	REG_REGION	Define Business Rules, Administer HR System, Setup, Regulatory Region, Regulatory Region	Set up a regulatory region.

Defining Regulatory Regions

Access the Regulatory Region page.



Regulatory Region page

Country

Select a country from the list and continue through the field. When you create a regulatory region, you must specify the country to which the region belongs. This enables country-specific edits even when a state-level or provincial-level region is used in a system transaction. If the country you want to add isn't in the list of values, add that country to the system using the Country Table.

Security Access

Select a security access level from the list. Because many companies have 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 the regions to which the user has access. Values are as follows:

Available To All: Operators can select this region.

Not Available To Anyone: No operators can select this region.

With Global Security Only: Only operators who have that region's country established in their "Security Detail" list of Data Security **(Administer HR System, Use, Maintain Global Security)** can select that region.

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

Default Record Group SetIDs

Use this group box to specify the SetIDs that make up this regulatory region. Since Regulatory Region is used to drive set processing in some applications, such as Health and Safety, Regulatory Region is a set control value. The default record group SetIDs establish an initial set processing relationship for this new regulatory region.

SetID

When you add a regulatory region, the **SetID** field is available for entry, and the **Clone From Existing Regulatory Region** field is unavailable for entry. The system places a default setID in the **SetID** field that bears the same name as the Regulatory Region Code that you just defined. If you haven't defined a SetID that matches this code, select another applicable SetID for your regulatory region from the list of valid values. The SetIDs in the list were set up using the TableSetID table. You can select only from those SetIDs.

Note. Before you can specify SetIDs, you must define SetIDs, record groups, set control values, and TableSet record group controls, using the PeopleTools Utilities component.

Clone from Existing Regulatory Region

You can clone the SetIDs attached to this new regulatory region from an existing regulatory region. Use this option if the new regulatory region that you're defining requires the same default record group SetIDs as those that you've already created for another region.

Enter the regulatory region that you want to clone.

See Also

"Administering PeopleSoft Security "

"Regulating HRMS System Data," Business Units and TableSet Sharing

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities"

Establishing Regulatory Transaction Types

Two sets of regulatory transactions are already defined in the system as shown in the following table:

Regulatory Transaction	*Countries or Regions Included*	*Reason*
STANDARD	All countries that are supported in the system.	Most modules apply regulatory and legislative edits at the country level.

Regulatory Transaction	*Countries or Regions Included*	*Reason*
HANDS (Health and Safety)	All countries that are 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 governing their Health and Safety reporting.

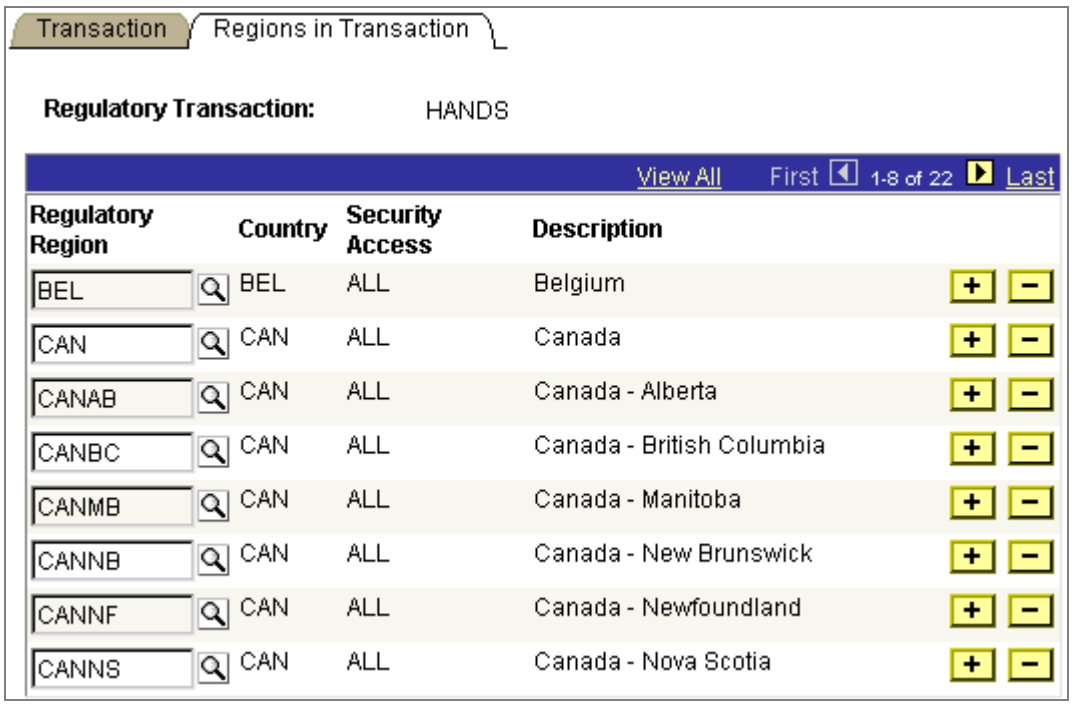
Use the two pages in the Regional Transactions component to assign new regulatory regions to these transaction types (if you have added countries or regulatory regions to the system) and to establish new regulatory transactions.

Pages Used to Update or Add Regulatory Transactions

Page Name	*Object Name*	*Navigation*	*Usage*
Regional Transactions - Transaction	REG_TRX	Define Business Rules, Administer HR System, Setup, Regional Transactions, Transaction	Update the regulatory transaction description or add a new regulatory transaction.
Regional Transactions - Regions in Transaction	REG_TRX_REGION	Define Business Rules, Administer HR System, Setup, Regional Transactions, Regions in Transaction	Define the regulatory regions that make up a regulatory transaction type.

Defining Regulatory Regions

Access the Regional Transactions - Regions in Transaction setup page.



Regional Transactions - Regions in Transaction page

Regulatory Region Select a regulatory region from the list.

If the regulatory region that you want to add isn't in the list of values, enter it into the system using the Regulatory Region table. The system displays the country, security access, and description that is associated with this regulatory region.

Associating a 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 that are 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 selecting the appropriate regulatory region and transaction.

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

Maintaining Regulatory Regions

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

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

Transaction Type	*Reg Region (Char 10)*	*Description Descr50*	*Country Code (Alt-Search)*	*Security Availability Status*
Standard	BEL	Belgium	BEL	With Global Security Only
Health and Safety	BEL	Belgium	BEL	
Standard	CAN	Canada	CAN	Available to All
Health and Safety	CANBC	Canada - British Columbia	CAN	
Standard	DEU	Germany	DEU	Available to All
Standard	FRA	France	FRA	Not Available to Anyone
Standard	GBR	UK	GBR	With Global Security Only
Standard	JPN	Japan	JPN	Not Available to Anyone
Standard	NLD	Netherlands	NLD	Not Available to Anyone
Health and Safety	QC	Canada - Quebec	CAN	
Standard	USA	United States	USA	Available to All

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

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. Use a Transaction view (normally STANDARD) from the Regulatory Region table to provide the appropriate prompt of Regulatory Regions for that transaction.

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

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

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. The following table lists the components that default a Regulatory Region value and the pages the value defaults from.

Component	***Default regulatory region value from:***
Position Data	Primary Permission List Preferences page
Job Data	Position Data component (if the employee is assigned to a position) ***or*** Primary Permission List Preferences page (if the employee is not assigned to a position)
Incident Details	Primary Permission List Preferences page
Disability	Job Data – Work Location page
Establishment	Primary Permission List Preferences page
Job Requisition	Position Data component (if the requisitioned job is assigned to a position) ***or*** Primary Permission List Preferences page (if the requisitioned job is not assigned to a position)

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "Creating and Tracking Incidents," Adding and Updating Incidents

"Regulating PeopleSoft HRMS Data," Setting Up Primary Permission List Preferences

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

"Working with Companies, Agencies, and Locations," Defining Establishments

PeopleSoft Human Resources PeopleBook: Manage Positions, "Maintaining Positions," Entering Work Location Information

Impact on PeopleCode Transaction Processing

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

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

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

Creating Prompt Edit Transaction Views for REG_REGION

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

```
REG_STANDARD_VW
SELECT
S.OPRID,
R.REG_REGION,
R.DESCR50,
R.COUNTRY
FROM PS_REG_REGION_TBL R,
      PS_REG_TRX_REGION  T,
      PSOPRDEFN S
WHERE T.REG_TRX = 'STANDARD'
AND T.REG_REGION =   R.REG_REGION
      AND (R.REG_AVAIL = 'ALL'
          OR (R.REG_AVAIL = 'GBL'
              AND S.OPRID = (SELECT OPRID FROM PS_SCRTY_TBL_GBL G
              WHERE S.OPRID = G.OPRID
              AND G.COUNTRY = R.COUNTRY)))
REG_HANDS_VW
SELECT
S.OPRID,
R.REG_REGION,
R.DESCR50,
R.COUNTRY
FROM PS_REG_REGION_TBL R,
      PS_REG_TRX_REGION  T,
```

```
      PSOPRDEFN S
WHERE T.REG_TRX = 'HANDS'
AND T.REG_REGION =   R.REG_REGION
      AND (R.REG_AVAIL = 'ALL'
          OR (R.REG_AVAIL = 'GBL'
              AND S.OPRID = (SELECT OPRID FROM PS_SCRTY_TBL_GBL G
              WHERE S.OPRID = G.OPRID
              AND G.COUNTRY = R.COUNTRY)))
```

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

Adding REG_REGION to Human Resources Transactions

Following are two examples of how to associate regulatory regions with human resources transactions:

Example - Job Data

To 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.

Example - Health and Safety

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

Warning! All linked setup values for an incident must belong to the same regulatory region. If the Regulatory Region is altered (such as when you are operating in update/display mode), and the SetID for the new Regulatory Region is different from the original, all linked setup fields and values are deleted to prevent inconsistent data. For example, the SetID for the Regulatory Region USA is *USA,* and for GBR it is *GBR.* If the Regulatory Region for an already established *USA* incident is changed to *GBR,* then all of the linked details on the Incident Details pages are lost. The system prompts you that the Regulatory Region is about to be changed, and you can choose whether to proceed before the values are deleted.

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

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

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

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

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

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

Additional Transaction Modifications for Regulatory Region

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

- Position Data, with REG_STANDARD_VW as the prompt edit.
- Job Requisition, with REG_STANDARD_VW as the prompt edit.
- Establishment table, with REG_STANDARD_VW as the prompt edit.
- Primary Permission List Preferences, with REG_STANDARD_VW as the prompt edit.
- Disability/Accommodation Request, with REG_STANDARD_VW as the prompt edit.

CHAPTER 4

Working With Currencies

This chapter provides an overview of currency and tells you how to:

- Define your currency setup.
- Set primary permission list preferences for currency.
- Configure currency precision.

Understanding Currency

If your organization operates in a global environment, your business tasks are probably global, too. You need to track personnel salaries and reimbursement amounts in multiple currencies, perhaps even multiple currency rate types, yet keep an eye on the bottom line by using one currency as a point of reference to track your expenses and costs worldwide.

Understanding currency in PeopleSoft is a two-part process:

- Understanding the mechanics of defining currency codes, types, exchange rates, and base currency, which are universal to PeopleSoft Human Resources.
- Understanding how some of the PeopleSoft Human Resources applications use this information. For example, PeopleSoft Global Payroll has extensive, application-specific currency functionality. For details of application-specific currency issues, see the application-specific documentation.

See Also

PeopleSoft Currency Conversion Utility PeopleBook

Defining Your Currency Setup

To use multiple currencies in PeopleSoft Human Resources, you set up and maintain the Currency Code, Currency Rate Type, and Market Rates tables. In addition to setting up these tables, you set up and maintain a currency quotation method for each From Currency/To Currency pair, which forms the basis of your currency conversions.

In this section, we describe how to:

- Maintain currency tables.

- Establish market rates.
- Maintain market rates.
- Define currency quotations.
- Calculate currency rates.

Understanding Enterprise Integration Points

When you save changes to the Currency Code Table, it publishes the Currency Code Table enterprise integration point (EIP). After HR publishes the data, other products can subscribe to the data for incorporation into their own data, keeping currency codes synchronized across applications.

See Also

PeopleSoft Enterprise Integration PeopleBook

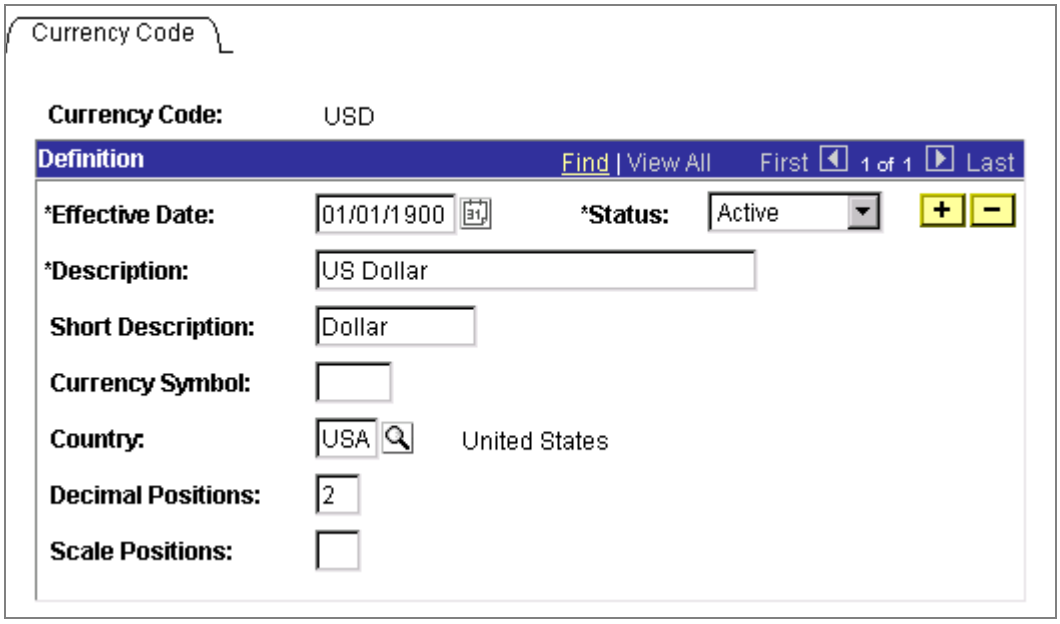
Page Used to Maintain Currency Tables

Page Name	*Object Name*	*Navigation*	*Usage*
Currency Code	CURRENCY_CD_TABLE	Define Business Rules, Define General Options, Setup, Currency Code, Currency Code	Define the decimal position by currency.
Market Rate Index	RT_INDEX_TBL	Define Business Rules, Define General Options, Setup, Market Rate Index, Market Rate Index	Describe the indexes for which you track rates.
Currency Rate Type	RT_TYPE_TBL	Define Business Rules, Define General Options, Setup, Currency Rate Type, Rate Type	Identify the rate types on which your exchange rates are based, to provide further categorization of market rates.
Market Rate Definition	RT_RATE_DEF_TBL	Define Business Rules, Define General Options, Setup, Market Rate Definition, Rate Definition	Enter a market rate definition. Define tolerance limits for rates and determine what action should occur if a new rate falls outside the set tolerance limit.

Page Name	*Object Name*	*Navigation*	*Usage*
Market Rates	RT_RATE_PNL	Define Business Rules, Define General Options, Setup, Market Rates, Market Rates	Enter and maintain market rates on the Market Rates Data table.
Market Rates - Rate Definition	RT_RATE_DEF_SEC	Click the Rate Definition button on the Market Rates page.	Modify the settings for the market rate.
Market Rates - Exchange Rate Detail	EXCH_RT_DTIL	Click the Exchange Rate Detail button on the Market Rates page.	View currency exchange rates.
Currency Quotation Method	CURR_QUOTE_PNL	Define Business Rules, Define General Options, Setup, Currency Quotation Method, Currency Quotation Method	Set up and maintain a currency quotation method for each From Currency /To Currency pair.
Cross/Reciprocal Rate Calc - Parameters	RUN_EO9030	Define Business Rules, Define General Options, Process, Cross/Reciprocal Rate Calc, Parameters	Set up reciprocal rates and cross rates.
Currency Exchange Calculator	CURRENCY_EXCHNG_PN	Define Business Rules, Define General Options, Setup, Currency Exchange Calculator, Currency Exchange Calculator	Calculate the currency exchange between currencies.

Maintaining Currency Tables

Access the Currency Code page



Currency Code page

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

Note. The Currency Code Table supports the ISO standard of 0, 2, and 3 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).

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.

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

Country Select the code for the country from which the currency originates.

Note. PeopleSoft contains fully populated country and state/province code tables.

See Also

"Setting Up PeopleSoft HRMS," Administering Country Codes

Decimal Positions Enter the number of decimal positions that will appear in the notation for the currency; for example, enter ***2*** for 2 decimal positions for Australian dollars ($5.00) and enter ***0*** for no decimal positions for Italian lira (500 L). Changing the decimal positions affects all currency values throughout the system. You cannot change only 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 that you want to round for this currency. Scale positions control the number 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 appear as ***24.*** Some PeopleSoft applications don't support the **Scale Positions** that are defined on this page; we recommend that you not set them if they aren't supported for your application.

See Also

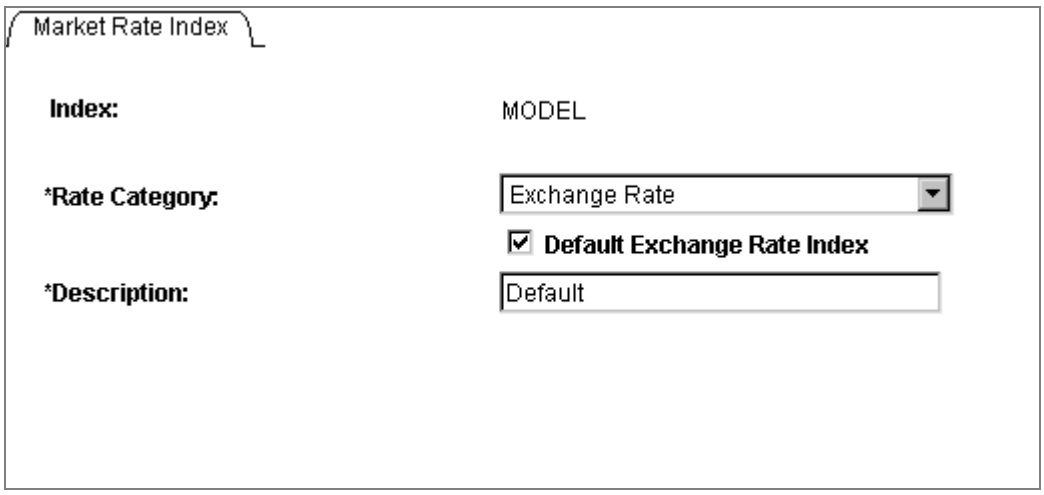
Configuring Currency Precision

Setting Up and Maintaining a Currency Quotation Method

PeopleSoft Enterprise Integration PeopleBook

Establishing Market Rates

Access the Market Rate Index page.



Market Rate Index page

The PeopleSoft approach to market rates and currency conversion is largely driven by the need to accommodate business practices that are related to the Euro. In addition to currency exchange rates, PeopleSoft supports the many different types of market rates that are used in global businesses, such as interest rates, stock exchange indexes, 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 the enterprise-wide requirements that are related to currency conversion, PeopleSoft provides a common repository for all types of market rate data and the option to enter and maintain rates manually.

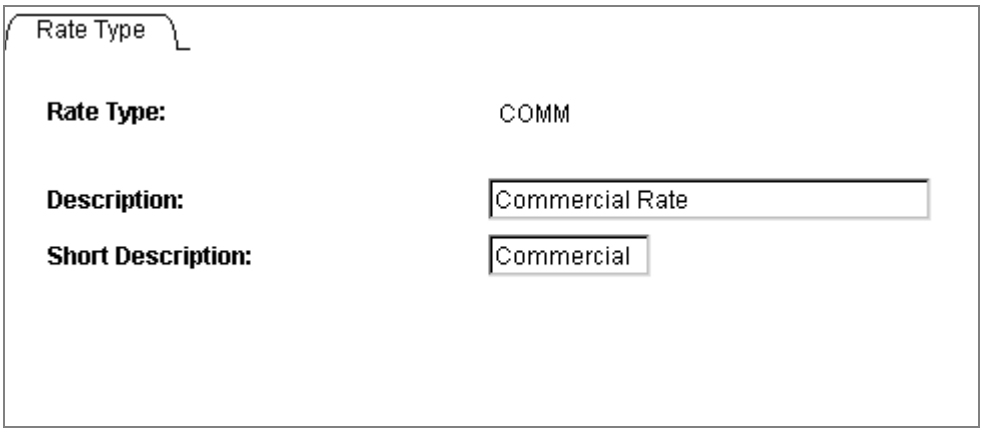
Index — Use the default index, ***MODEL,*** for currency exchange rates.

Rate Category — Select a rate category from the list. Values are as follows: ***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*** indexes, select this check box to indicate that a particular index is used to calculate currency exchange rates. You can specify only one index code as the default.

Identifying the Rate Types

Access the Currency Rate Type page.



Currency Rate Type page

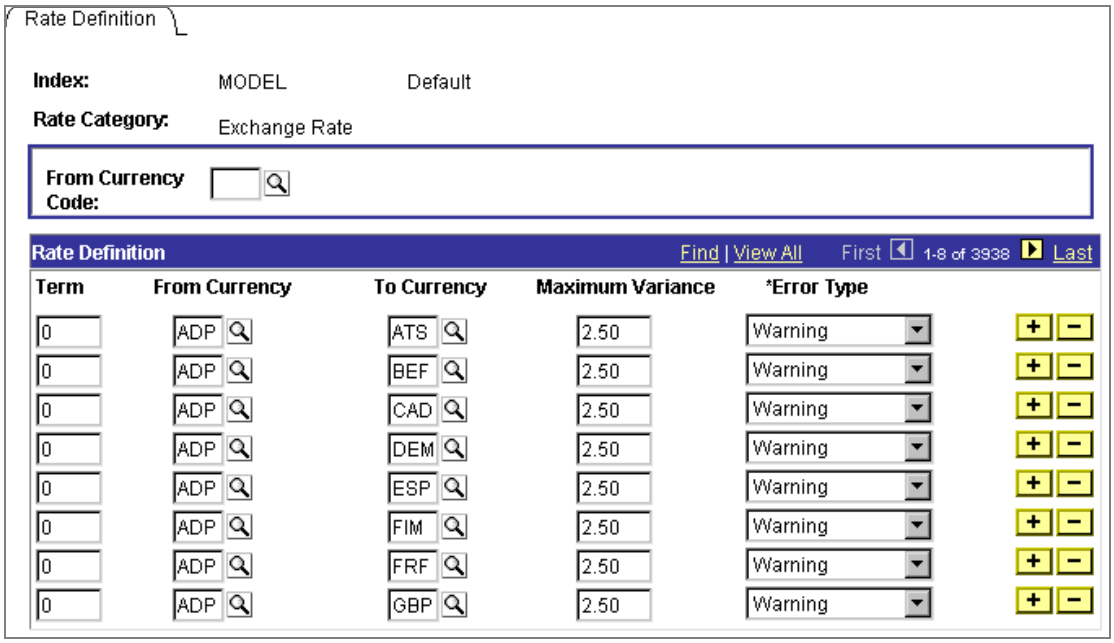
Rate Type When you convert from one currency to another, the rate type tells the system which exchange rate to use. By using rate types, you can convert the same currency using more than one exchange rate. Depending on your requirements, you might have several rate types. Typical rate types are official, commercial, floating, average, historical, and contract.

Example

Ten employees in Germany are on assignment from England. They receive their housing allowance in marks, rather than pounds. 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 exchange pounds to marks at two separate rates: the official bank rate and the fixed contract rate. So you would set up two currency rate types, one called *Official* and another called *Contract.*

Defining the Market Rate

Access the Rate Definition page.



Market Rate Definition page

The fields on this page differ according to the Rate Category of the Market Rate Index.

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** of ***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.

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

From Currency, To Currency — Enter the currency values. These values are used for exchange-rate pairs. When using triangulation, include a definition for each currency pair involved.

Maximum Variance — Enter the percentage of variance allowed when the user maintains the market rate. If the change exceeds the tolerance, you get an error message. The default value is ***2.5%.***

Error Type — Enter the type of error processing that occurs if the maximum variance is exceeded. Values are as follows:

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.

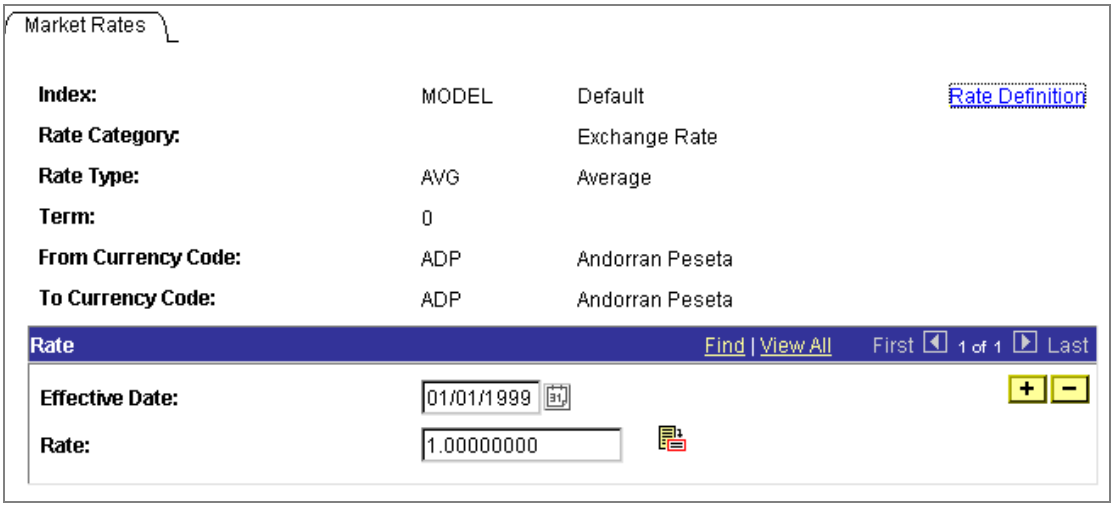
Stop: Processing stops; the system prevents you from saving the new rate.

See Also

Setting Up and Maintaining a Currency Quotation Method

Maintaining Market Rates

Access the Market Rates page.



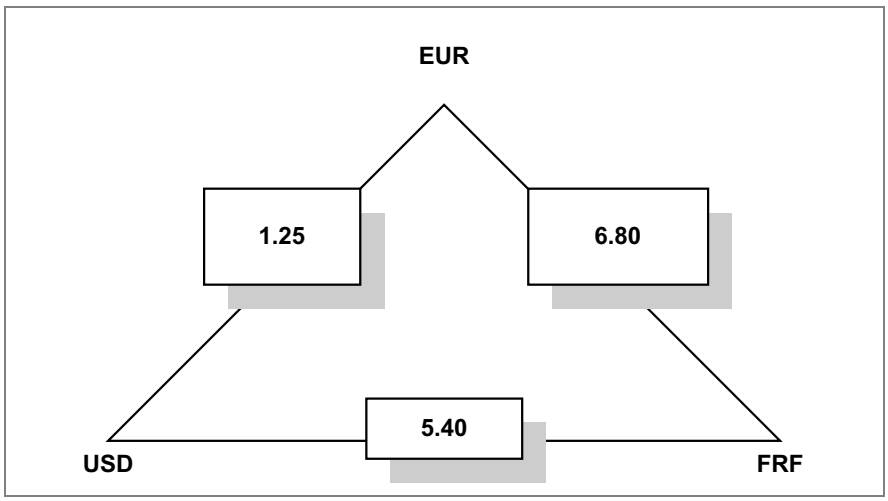
Market Rates page

Rates are effective-dated, enabling you to track them as they change over time.

Once you enter currency codes into the system and determine your currency rate type requirements, enter and track the rates of exchange in the Market Rates Data 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 that they are up to date and accurate for your purposes.

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 can also be one of the other component rates of the triangle. You can edit the rate for both nontriangulated rates and triangulated rates if a quotation method has been defined for the currency pair and the 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 on 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 through 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 only if none of the following conditions is 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.

Note. 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, and then run the Cross-Rate Reciprocal SQR (FIN9030.SQR) to define the triangulated exchange rates.

If a quotation method has been defined for the currency pair, and if the Auto Reciprocate check box for the 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 the 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.

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



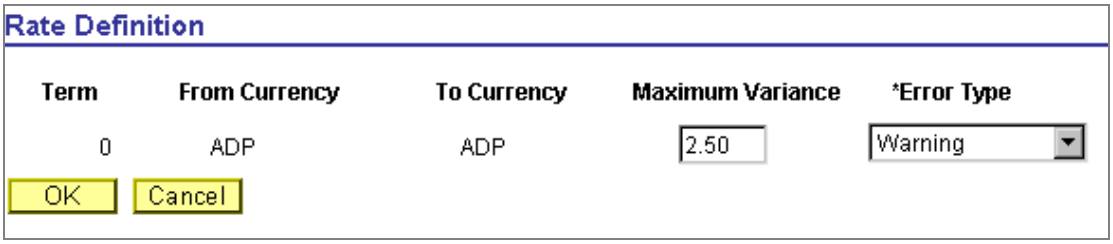
Click the **Exchange Rate Detail** button to access the Exchange Rate Detail page, where you can view your currency exchange rates.

See Also

Calculating Currency Rates

Modifying Settings for the Market Rate

Access the Market Rates - Rate Definition page.



Market Rates - Rate Definition page

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

Error Type You can 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. Values are as follows:

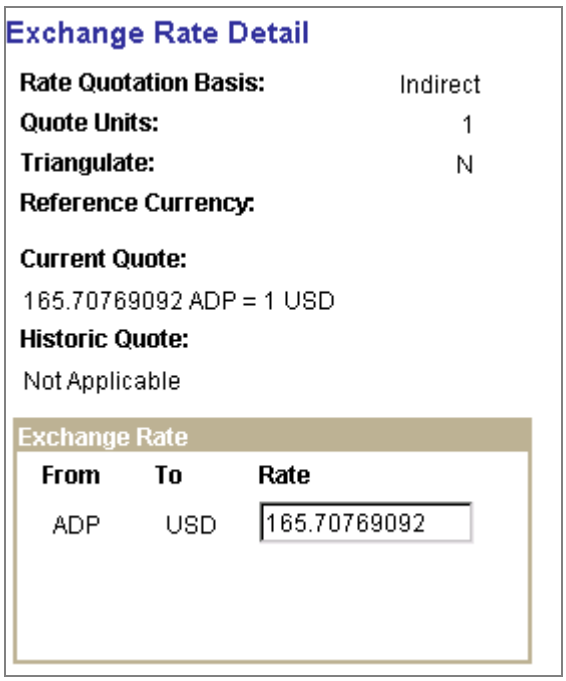
None: No error processing occurs; the new rate is used even though it exceeds the limit.

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

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

Viewing Currency Exchange Rates

Access the Market Rates - Exchange Rate Detail page.



Market Rates - Exchange Rate Detail page

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

The historic exchange rate is displayed according to the current quotation method, which may not be the quotation method that was originally used by the historic rate. This makes it convenient to compare how the exchange rate has changed over time, using a consistent quotation method, even if the quotation method has changed. When the system determines that the historic quotation method and the current quotation method are different, it displays a historic quote in the **Historic Quote** field.

In the exhibit above, the Exchange Rate Detail page is for a triangulated currency pair. For a nontriangulated currency pair, the lower section of the page would contain only the visual rate.

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

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

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

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

Reference Currency

Displays the reference currency for triangulated exchange rates (only) and the reference currency that is used in the triangulated exchange.

Current Quote

Displays the current quote (exchange rate) that was used to convert the **From** currency to the **To** currency.

- A direct, nontriangulated rate displays quote units (or ***1***) on the left side of the equal sign and the visual rate on the right. For example:

1 USD = 1.40000000 CAD

- An indirect, nontriangulated rate displays the visual rate on the left side of the equal 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 that indicates the quotation method that was originally used by a historic exchange rate, if the system determines that the original quotation method is different from the current quotation method.

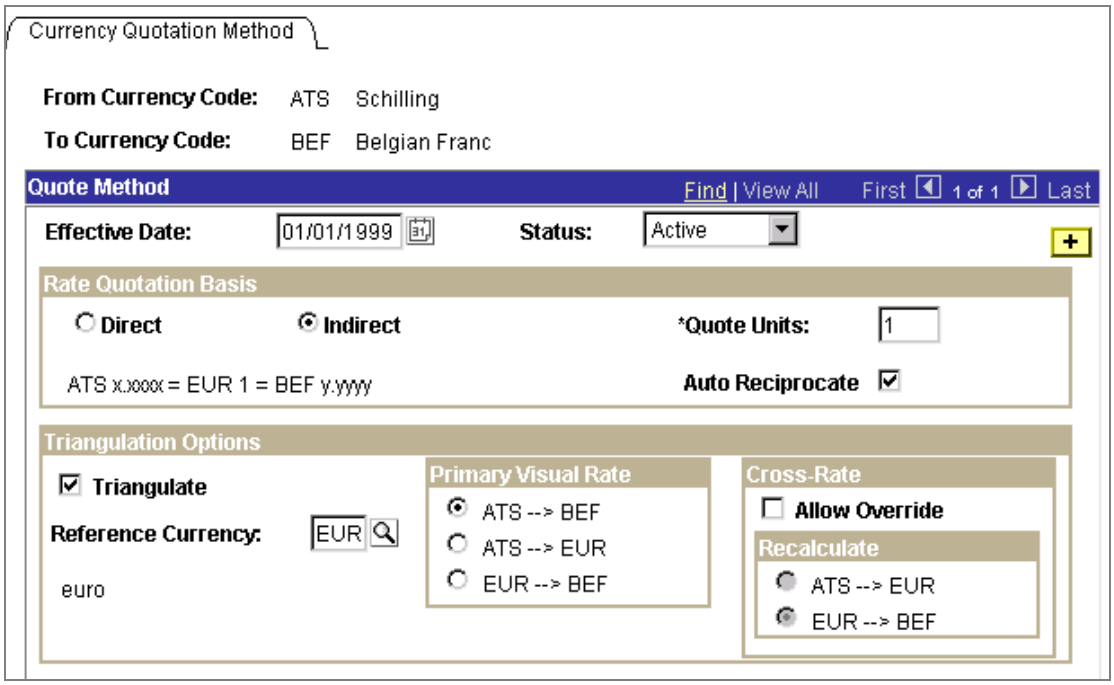
If the system determines that the historic and current quotation methods are the same, the **Historic Quote** field displays ***Not Applicable.***

Exchange Rate

Displays one visual rate for nontriangulated exchange rates or all three visual rates for triangulated exchange rates**.** You can edit the cross rate for triangulated exchange rates only if the Allow Override check box is selected in the quotation method definition for **Exchange Rate.**

Setting Up and Maintaining a Currency Quotation Method

Access the Currency Quotation Method page.



Currency Quotation Method page

PeopleSoft supports direct and indirect rate quotation, quote units, and triangulation. These options provide tools for converting and managing multicurrency operations.

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 don't typically maintain rates online. Instead, the Cross Rate/Triangulation Generation SQR uses the rates between the From Currency and the Reference Currency and between the Reference Currency and the To Currency, to determine the cross rate.

Rate Quotation Basis

In the **Rate Quotation Basis** group box, you determine whether the rates for a currency pair are to be quoted directly or indirectly.

Direct	A direct quote indicates that the **From Currency Code** will be quoted directly against the **To Currency Code.**
Indirect	An indirect quote indicates that the **To Currency Code** will be quoted directly against the **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 as follows:

From Currency * RATE_MULT/RATE_DIV = To Currency

Quote Units

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

For example:

The exchange rate between ITL and FRF can 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

Select to have the system create or update the rate for the selected reciprocal currency pair when 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 automatically reciprocate only the currency pairs for which quotation methods have been established. This check box is selected by default.

Triangulation Options

Triangulate

Select to have the system convert two currencies through a third currency (the reference currency).

Triangulation is used in hyperinflationary environments where 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. With the introduction of the Euro, all participating currencies are quoted directly against that currency.

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, as follows:

1. Convert the USD amount to the reference currency using the appropriate spot rate.

2. Convert the reference currency to FRF using the fixed exchange rate.

Typically, you don't maintain these rates directly; instead, you process them and all other 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-multiply)*	***Rate-Div*** *(rate-divide)*
USD to Euro	Indirect	1	1.25	1	1.25
Euro to FRF	Direct	1	6.8	6.8	1
USD to FRF	Triangulate via Euro	1	N/A	6.8	1.25

Reference Currency Select the currency through which the From currency is to be converted. For example, when you convert between French francs and U.S. dollars, the reference currency is ***EUR*** (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 the rate that you want to use as the primary rate, the one that appears on primary pages and reports.

Cross-Rate In this group box, select **Allow Override** to enable users to override the cross rate for a triangulated currency pair. If this check box is clear, users can only change the components of the triangulated rate.

Recalculate If you select **Allow Override,** also 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 updated automatically.

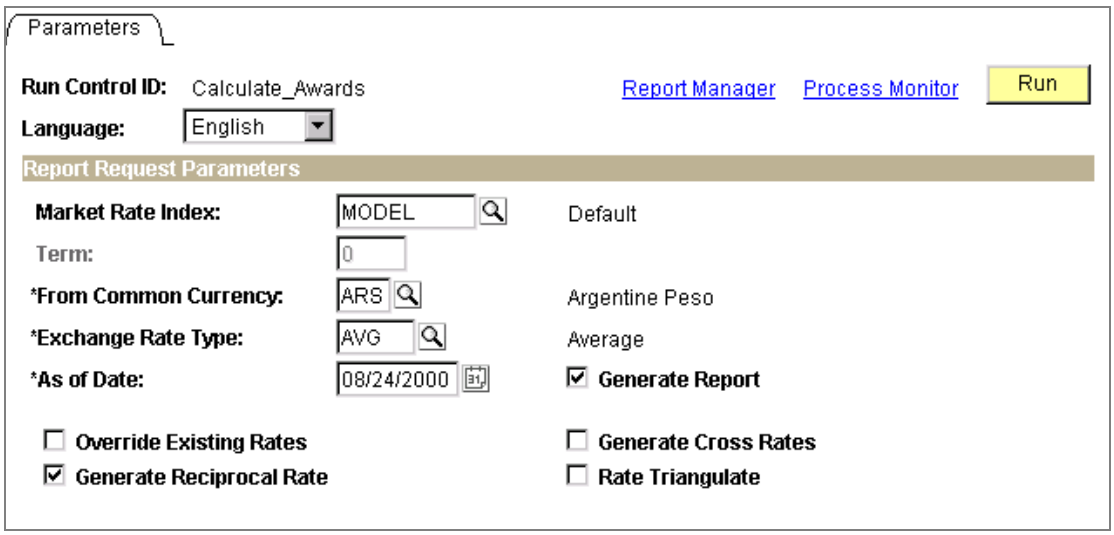
The following table shows each possible field value with its reciprocal value:

Field	***Value (Example: USD to FRF)***	***Reciprocal Value (Example: FRF to USD)***
Quotation Basis	*Direct*	*Indirect*

Field	*Value (Example: USD to FRF)*	*Reciprocal Value (Example: FRF to USD)*
	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 (for example, USD → FRF)	From → To (for example, FRF → USD)
	From → Reference (for example, USD → EUR)	Ref → To (for example, EUR → USD)
	Reference → To (for example, EUR → FRF)	From → Reference (for example, FRF → EUR)
Allow Override	Yes	Yes
	No	No
Recalculate	From → Reference (for example, USD → EUR)	Reference → To (for example, EUR → USD)
	Reference → To (for example, EUR → FRF)	From → Reference (for example, FRF → EUR)

Calculating Currency Rates

Access the Cross/Reciprocal Rate Calc - Parameters page.



Cross/Reciprocal Rate Calc - Parameters (cross/reciprocal rate calculator - parameters) page

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 that have been established for each currency pair on the Currency Quotation Methods page. The Currency Exchange Calculator page calculates rates between currencies.

Language Select the language for translation.

Market Rate Index Select the market rate index. For non-Treasury Management applications, select the default index, ***MODEL.***

Term Select the term. For non-Treasury Management applications, enter ***0.***

From Common Currency Select the currency type.

Exchange Rate Type Select the exchange rate type.

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

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

Override Existing Rates Select if you want this calculated rate to override rates for the exchange rate type that currently resides on the Exchange Rate table (regardless of the As of Date).

Generate Reciprocal Rate Select to have the system calculate reciprocal rates for you. PeopleSoft doesn't manipulate the exchange rates directly, but uses numerator and denominator values as follows:

From Currency * RATE_MULT/RATE_DIV = To Currency

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

$$xFRF \frac{(RT_MULT)\ 1}{(RT_DIV)\ 5} = yUSD$$

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

Generate Cross Rates Select to have the system generate cross rates. For example, for cross-currency rates between dollars, francs, and marks, you enter USD to FRF = 5 and USD to DEM = 1.43; the system generates FRF to DEM = 1.43/5 = 0.286.

If you select this check box, also select a **From Curr** currency and a **To Curr** currency. The **To Curr** field is useful if you need a particular rate. You can enter the **%** wild card in either field, or both fields, to indicate *from all* or *to all* currencies. Press the F7 key to add more currency types for cross-rate generation.

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

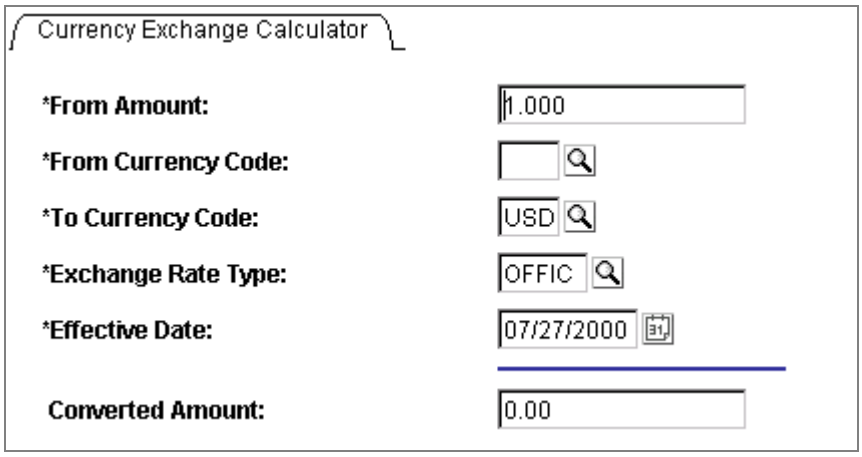
Run Click to run the report using PeopleSoft Process Scheduler.

See Also

PeopleTools PeopleBook: Process Scheduler

Calculating the Currency Exchange Between Currencies

Access the Currency Exchange Calculator page.



Currency Exchange Calculator page

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 that have been established for each currency pair on the Currency Quotation Methods page. The Currency Exchange Calculator page calculates rates between currencies.

From Amount	The currency exchange is based on the **From Amount** value that you enter and the current exchange rate that is 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 calculates the amount in this field when you save the page.

Setting Primary Permission List Preferences for Currency

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

This section describes how to:

- Set defaults for a primary permission list.
- View information about current exchange rate calculations.

See Also

”Regulating PeopleSoft HRMS System Data” Setting Up Primary Permission List Preferences

Pages Used to Set Defaults for a Primary Permission List

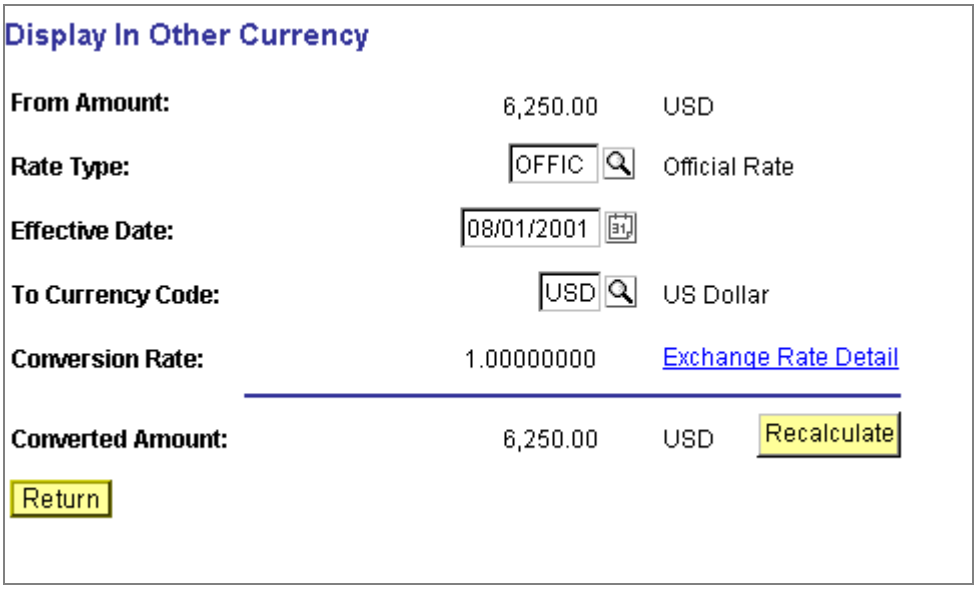
Page Name	*Object Name*	*Navigation*	*Usage*
Primary Permission List Preferences - Defaults	OPR_DEF_TBL_HR	Define Business Rules, Define General Options, Setup, Primary PrmList Preferences, Defaults	Set defaults for a primary permission list.
Display In Other Currency	CURRENCY_OTHER	Click the Display In Other Currency button on a page featuring currency fields.	View an amount in a field in another currency.
Exchange Rate Detail	EXCH_RT_DTL_INQ	Click the Exchange Rate Detail button on the Display In Other Currency page.	View information about current exchange rate calculations.

Viewing Multiple Currencies

Access the Display in Other Currency page.



To open this page, click the **Display In Other Currency** button on any page that supports multicurrency.



Display in Other Currency page

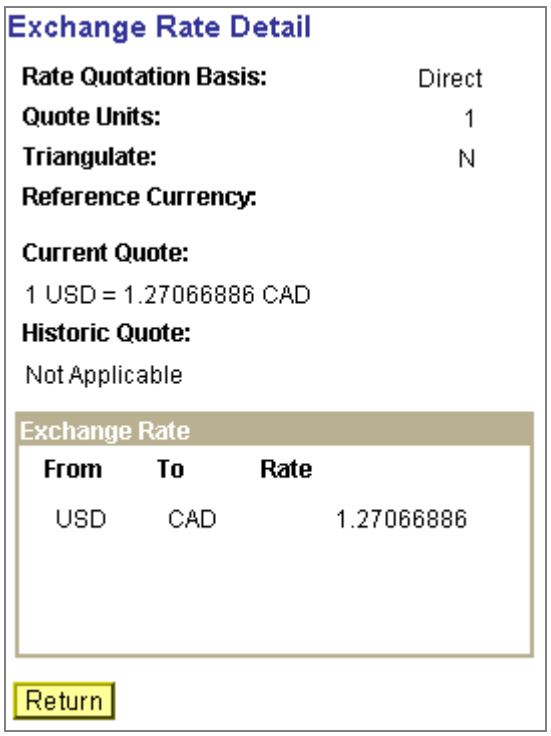
Many of the pages that display earnings or amounts in one currency enable you to view the amounts in another currency. This is an integral feature of the PeopleSoft Economic and Monetary Union (EMU) support and it enables you to view conversions across all currencies that are supported by the system.

See Also

"Regulating PeopleSoft HRMS System Data" Setting Up Primary Permission List Preferences

Viewing Information about Current Exchange Rate Calculations

Access the Exchange Rate Detail page.



Exchange Rate Detail page

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

Configuring Currency Precision

According to the ISO standard, currency precision can range from no decimals to 3 decimals. For example, U.S. dollar amounts have 2 digits to the right of the decimal; Japanese yen have none. To support this dynamic currency precision, PeopleSoft delivers all of its currency-sensitive amount fields with a standard length of 13.2; that is, 13 digits to the left of the decimal and 2 digits to the right. Optionally, with some modification, you can expand these amount fields in your system to a maximum of 15.3 digits. There is a controlled currency on the same record to control the display and processing of such amount fields.

PeopleSoft rounds all currency-sensitive amount fields to the currency precision of the controlled currency during all online or background processes. For example, in a database containing amount fields with a length of 15.3, Japanese yen are rounded to123.000 and U.S.

dollars are rounded to 123.230. The system doesn't place a nonzero amount after the decimal for a Japanese amount or after the second digit to the right of the decimal for a U.S. amount.

PeopleSoft displays the amount fields on the online pages with the proper precision. For example, it displays Japanese yen as 123 and U.S. dollars as 123.23. When entering an amount, you can't enter more than the defined precision; if you do, the system treats the entry as an online error.

PeopleCode programs and background processes round all currency-sensitive amount fields to the currency precision of the controlled currency.

Activating Currency Precision

Currency precision is a PeopleTools option; selecting this option activates all of its features. With the option turned off, the system displays amount fields as defined in PeopleSoft Application Designer and rounds them to the number of decimals defined there.

Activate the PeopleTools multicurrency option on the PeopleTools Options page by selecting the Multi-Currency check box. PeopleTools will then use the precision you specify in the Currency Code table for the currencies relating to monetary fields for which you have specified currency control fields. Some PeopleSoft applications are shipped with the Multi-Currency check box selected. You can change that default.

Note. Once you clear the Multi-Currency check box, selecting it again does not automatically round the existing transaction amounts. If you clear the Multi-Currency check box, PeopleSoft supports only the default amount field size of 13.2. It does not support the larger amount field size of 15.3.

See Also

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities," PeopleTools Options

Reporting With Currency Precision

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

For reporting with Crystal Reports and PS/nVision (Excel), the amount appears as a 2-decimal number. You have to modify the reports if you want to show 3 decimals on these reports.

Our third-party reporting tools don't fully support numeric fields that are greater than 15 digits. PS/nVision (Excel) uses an 8-byte float for numeric fields. This causes truncation after the fifteenth digit. Crystal Reports displays up to 16 digits correctly; for numbers that are greater than 16, Crystal Reports starts to insert nonsensical numbers into the decimal positions; however, this is a problem only with very large numbers. For any of these reporting tools, you should have accurate results up to the following amounts:

- Hundreds of trillions of yen (or lira): Precision = 0
- Trillions of dollars: Precision = 2
- Hundreds of billions of dinar: Precision = 3

For example, if you enter 2's into a 15.3 numeric database amount field, the following third party reporting tools will display the value as:

Number of Digits	*Crystal Reports*	*PS/nVision (Excel)*	*SQR*
16	2,222,222,222,222.222	2,222,222,222,222.220	2,222,222,222,222.222
17	22,222,222,222,222.219	22,222,222,222,222.200	22,222,222,222,222.220
18	222,222,222,222,222.188	222,222,222,222,222.000	222,222,222,222,222.200

Expanding a Database for Currency Precision

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

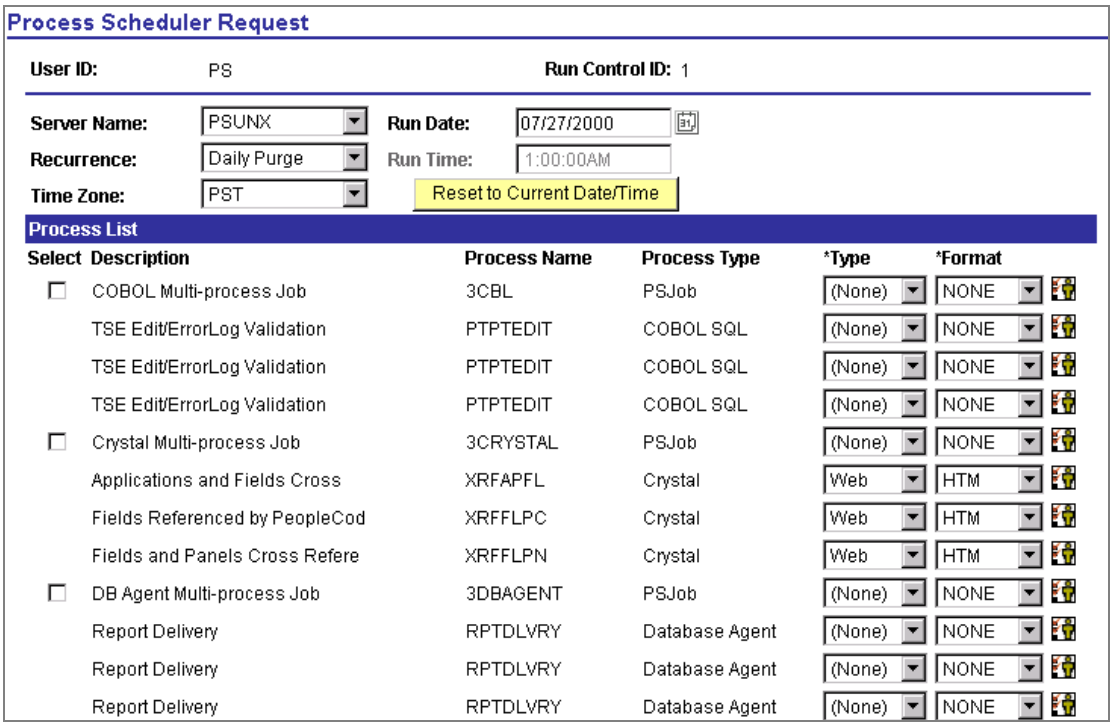
To expand your database:

1. Back up your database (optional).

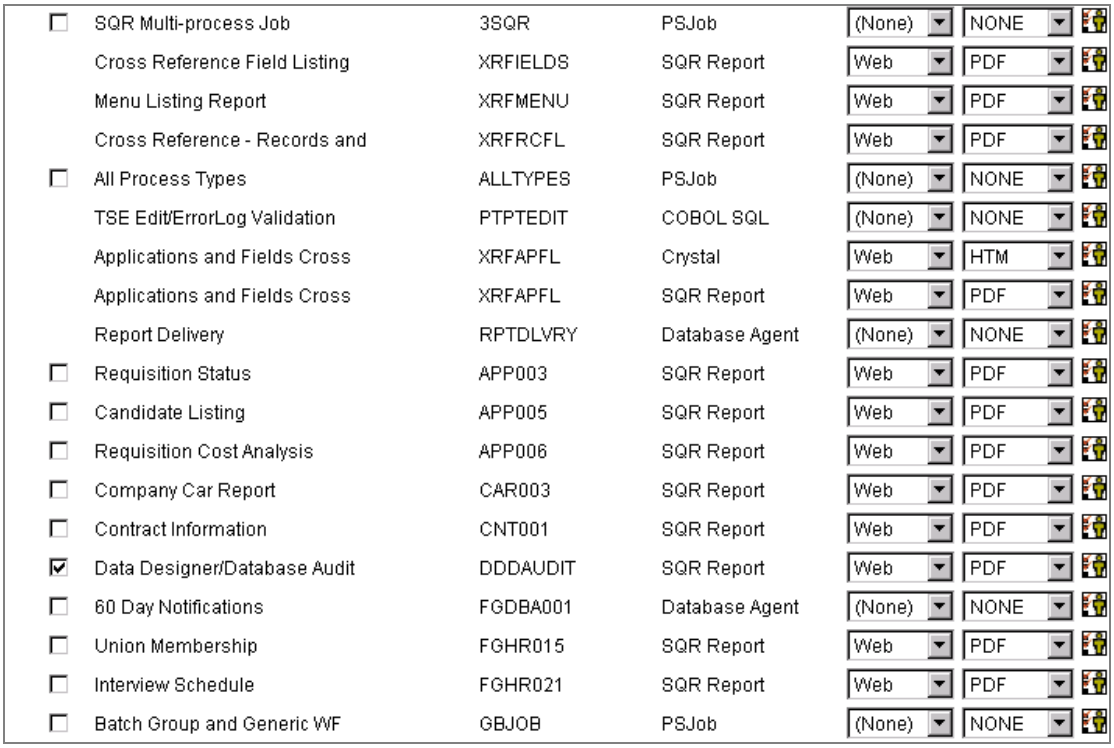
   Although this step is optional, we highly recommend it. This way, you can recover your database if you experience any database integrity problems during the remaining steps.

2. Run Audit scripts.

   Run DDDAudit and SYSAudit from PeopleSoft Process Scheduler to ensure that the database is clean. Select **PeopleTools, Process Scheduler Manager, Process, Multiple Process Sample** and enter a **Run Control ID.** Click **Run** or select **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.



Running DDAUDIT (1 of 2)



Running DDAUDIT (2 of 2)

3. Review the script output to ensure a clean database.

Locate the DDDAudit and SYSAudit reports in your environment and review them to ensure that the database is clean.

4. Run FSINTLFD.DMS to populate the international field size table.

   Once the database is clean, run the script FSINTLFD.DMS to populate the international field size table INTL_FLDSIZ_TBL. Use DataMover to run this script. The system populates the international field size table with all the amount fields that have the controlled currency that is specified in Application Designer. The system calculates the new length by adding 2 digits to the left of the decimal and 1 digit to the right of the decimal. Before the system inserts new fields into the international field size table, it deletes all existing fields from the table.

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

   Select the International Field Size page. The **Field Size - International** column displays 15.3 for most of its fields. When compared with the **Current Field Size,** the values in the **Field Size - International** column should be 2 digits greater to the left of the decimal and 1 digit greater to the right of the decimal. In other words, a Current **Field Size** value of ***13.2*** should correspond to a ***15.3*** value in the **Field Size - International** column.

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

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

   It also creates a report (TLSINST1.LIS) that lists all the pages that use Average or Maximum size page fields. As a standard of PeopleSoft Enterprise, all monetary amount fields use a Custom field size to avoid the overlapping of fields when the amount fields are expanded. Review the list of pages and make any adjustments that are necessary to preserve readability.

7. Review SQR.LOG for errors.

   The SQR log is created in C:\TEMP, unless otherwise specified. View the log to ensure that the field size value has been changed to ***15.3.*** Verify the result by randomly checking the field size, opening the various records containing amount fields, such as JRNL_LN, JRNL_HEADER, and VCHR_ACCTG_LINE. As you build the project, executing scripts to SQL alter tables, creating views, and indexing, closely monitor the execution of the scripts and review the error log.

8. Use SQL Alter all tables.

   a. Select **PeopleTools, Application Designer, File, New, Project.**

   b. Select **File, Save Project As.**

   c. Save the **Project Name** as ***CURR_TBL.***

   d. Select **Insert, Objects into Project.**

e. Select **Object Type:** ***Record*** and **Type:** ***Table.***

f. Click **Insert** under **Record Name.** The system displays a list of all the tables being populated.

g. Click **Select All** and click **Insert** again; click **Close** to close the page.

h. Select **Build, Project.**

i. In the **Build Options** group box, select **Create Indexes** and **Alter Tables.**

j. Under **Build Execute Options,** be sure that the ***Build*** script file is selected.

k. Review the script file with your database administrator (DBA) and execute the file using your recommended SQL query tool.

9. Use SQL Create all views.

a. Select **PeopleTools, Application Designer, File, New, Project.**

b. Select **File, Save Project As.** Save the **Project Name** as ***CURR_VW.***

c. Select **Insert, Objects into Project.** Select **Object Type:** ***Record*** and **Type:** ***View/Query View.***

d. Click **Insert** and then click **Select All.**

e. Click **Insert** again; then click **Close** to close the page.

f. Select **Build, Project.**

g. In the **Build Options** group box, select **Create Views.**

h. Under **Build Execute Options,** select the ***Build*** script file.

i. Review the script file with your DBA and execute it using your recommended SQL query tool.

10. Run Audit scripts again.

Run DDDAudit and SYSAudit again to make sure that the database is clean.

11. Manually change reports.

PeopleSoft has enhanced most SQR reports to accommodate 15.3 amount fields. However, some of them are too crowded, and their amount field sizes remain 13.2. If the last digits of the decimals are important to you, update the SQR to 12.3 to display 3 decimals on the report. Following is a list of reports that require manual changes by application to accommodate the third digit of the decimal:

General Ledger	GLS1001, GLS1003, GLS7000, GLS7009, GLS7010, and GLS7012
Receivables	AR30001 (9.2), AR30002 (9.2), AR30003 (9.2), and AR30004 (12.2)

See Also

PeopleTools PeopleBook: Globalization, "Controlling the Currency Display Format," Resizing Currency Fields Using the International Field Size Report

CHAPTER 5

Working With Languages.

This chapter provides an overview of multiple-language support in PeopleSoft and tells you how to:

- Set language preferences.
- Work with double-byte characters.

Understanding Language Support in PeopleSoft

A key part of any multiple-country system is language support. PeopleSoft streamlines the process of using multiple languages. For example, to change from one language to another during a session, you change the contents of only one field, and the system changes to the new language. You can change from German to English to French and back to German all in one session. This section introduces you to language support in PeopleSoft.

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

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

To maintain full language capability when you modify your application, you enter translations of any new items. If you use only one language and enter new items in that language, that's fine. However, if you use more than one language and you do not translate the new items, they appear in your original language, even when you change to another language. Then you may see more than one language on your page.

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

See Also

PeopleTools PeopleBook: Globalization, "Overview of PeopleSoft Globalization"

Setting Language Preferences

PeopleSoft has built-in language preference capabilities. Regardless of your system's base language, you can view a PeopleSoft application in any supported language.

Using the Language Preference Page

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

Once setup is established, click the Language Name button to view the sign-on page in the specified language. The language you select determines the language in which the entire application is displayed in the PeopleSoft Internet Architecture. For the Windows client, the Configuration Manager defines the application language.

Note. The Language Code used in **PeopleTools, Maintain Security, Use, My Profile** is applied only when you run reports and produce emails.

Using the User Profiles - General Page

When you log in, the language preference that is set in your user ID specifies your language of preference. When the application opens, the pages, menus, and data appear in that language, assuming that they're translated. You can use the User Profiles – General page to select a user language preference. Enter the user's preferred language in the Language Code field. The language code that you enter determines the language with which you see pages when you log on to the system. Your selection here updates PSOPRDEFN.LANGUAGECD. The next time you log in, you have a new language code.

Select the Multi-Language Enabled check box for multiple-language capability.

Classes

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

See Also

PeopleTools PeopleBook: Security

Using the International Preferences Page

After you log in to a PeopleSoft application, you can change your language preference anytime during your session on the International Preferences page When you change your language preference, everything appears in the new language, assuming that it's translated. If you change your language of preference, the language code change isn't written to the database, but is stored in PeopleTools memory for the duration of the current session.

The language code you indicate is the language that the system uses for future pages that are displayed during the current session. This is the language of the session until you either log off or change your language preference. The tool set uses the language code to apply country-specific formats for numbers, dates, and currencies. If you change the language code during a session, your user profile language preference is not affected. The next time you log in, you'll see the language that is associated with your user ID or security class.

Making a change means that everything you see—pages, menus, and field contents—appears in your new language preference.

Note. Your PeopleSoft language selection is independent of your Microsoft Windows language options. To change your Windows language parameters, select **Start, Settings, Control Page.**

See Also

PeopleTools PeopleBook: Globalization, "Controlling International Preferences"

PeopleTools PeopleBook: Security, "User Profiles"

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 to switch between a base language table and a related language table to view information in alphanumeric or double-byte characters.

The alternate character architecture accommodates languages (such as Japanese) that require the entry of proper nouns by using two-character sets to support phonetic sorting rather than binary sorting on proper nouns. For example, users who enter data in Japanese require functionality that allows them to enter proper nouns (such as names or descriptions) both in Kanji and by using a phonetic double-byte character set, such as Zenkaku Katakana. To accomplish phonetic sorting in PeopleSoft HRMS, configure your system so that the user can enter Japanese proper nouns twice: once in double-byte Kanji and once (phonetically) using Katakana or Hiragana.

(JPN) 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 aren't sorted together in PeopleSoft HRMS. For example, a Hiragana *Ma* character is sorted before a Hiragana *Mi* character and after a Hiragana *No* character. If a Katakana *Ma* character is included in the sort, it is sorted after a Katakana *Mi* character and appears only after all the Hiragana characters are sorted.

See Also

PeopleTools PeopleBook: Globalization

Configuring Your System for Alternate Character Functionality

Warning! Before you can enter double-byte characters and implement alternate character functionality in PeopleSoft HRMS, you must be using a Japanese-enabled database and a double-byte-enabled operating system. Otherwise, PeopleSoft HRMS can't validate double-byte characters in the alternate character fields.

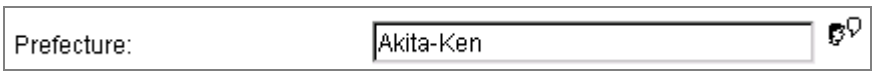
To set up alternate character functionality in PeopleSoft HRMS:

1. Link the alternate character sets with language codes on the Alternate Character page.

   These settings affect your entire PeopleSoft HRMS installation.

2. Enable the alternate character functionality for specific user IDs on the Primary Permission List Preferences page.

   When you enable alternate character functionality for a user, the system displays a button to the right of all the fields on the Global menus that have an associated Alternate Character field, as shown in the following example:



Alternate Character Button

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

See Also

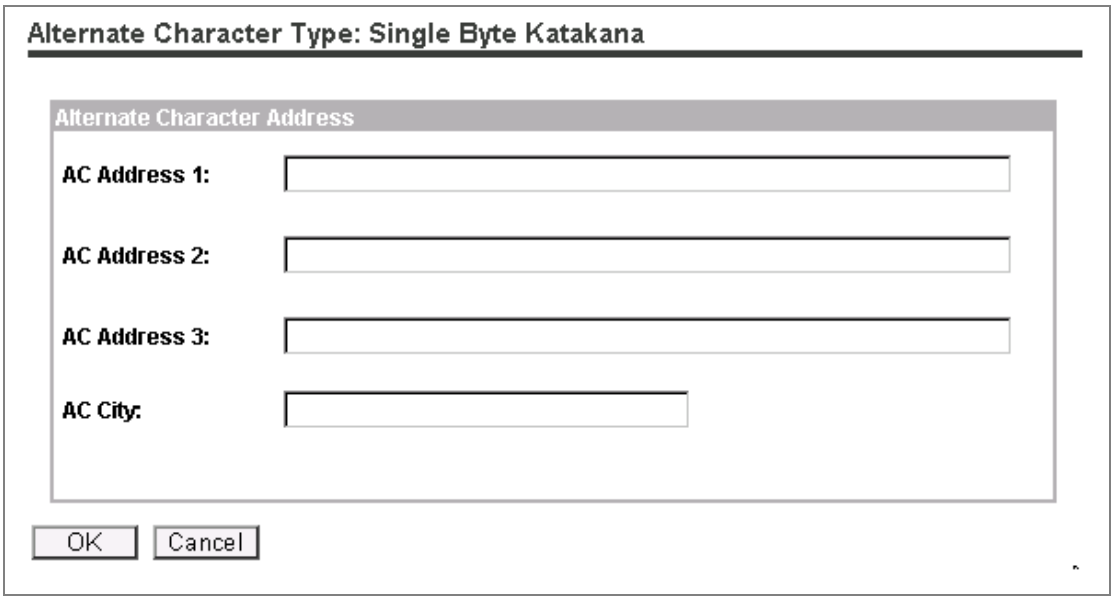
"Regulating HRMS System Data," Regulating PeopleSoft HRMS System Data

Entering Alternate Character Information

On pages on the Global menus in PeopleSoft Human Resources, you can access the alternate character fields for proper noun fields like Name, City, and Company Description. You access these fields by clicking the Alternate Character button that appears to the right of a field that has a corresponding Alternate Character field available.

Note. On the Name page, when the Format for Country is *JPN,* the Name and the Alternate Character Name fields appear on the page: You can enter information in both fields directly on the Name page. On the Address page, you access the alternate character format by using 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, such as the example that follows, where you can enter any proper noun information, such as street and city, in the designated alternate character format.



Alternate Character Address page

Note. In the title bar, the system displays the alternate character type that is specified for the alternate character.

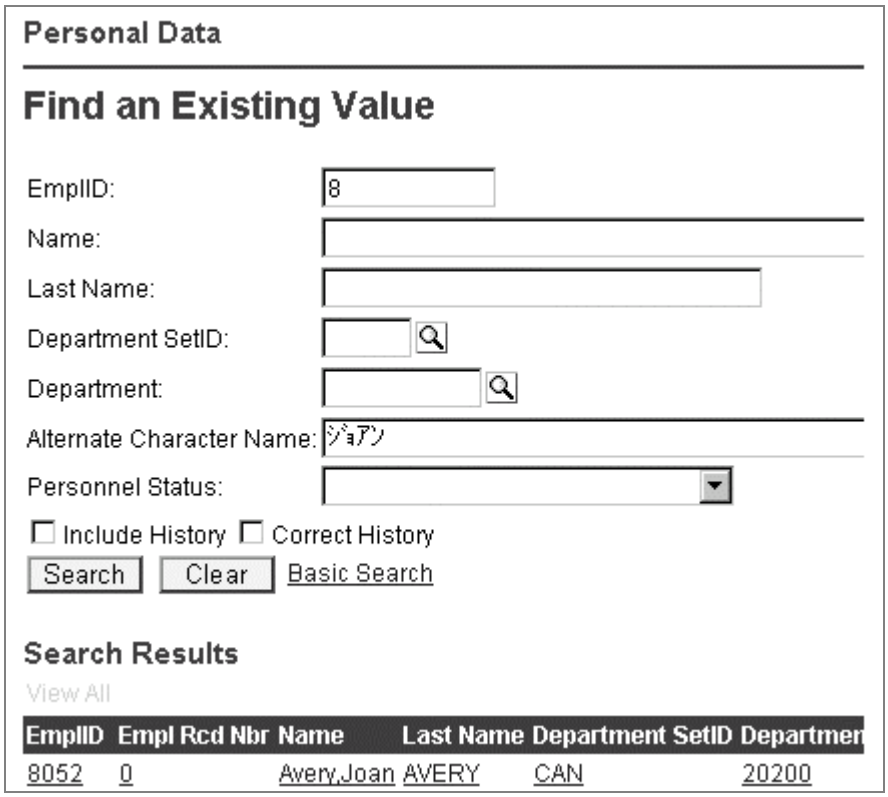
Once you enter alternate character information into an alternate character field and click **OK** to close the page, the system changes the appearance of the Alternate Character button on the page to indicate that alternate character information is available for the primary proper noun field on the main page.

Finding Records Using Phonetic Searching

PeopleSoft Human Resources provides several options for finding an employee and updating or adding information to the employee's 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 box. If you are working with a Japanese-enabled system, you can enter a Japanese name phonetically as a search criterion.

For example, to update Japanese employee Noriko Kawamoto's Personal Data record, place the cursor in the Alternate Character Name field, enter the Japanese phonetic characters for *Kawamoto,* and click OK. The list box on the search record page displays all the names (sorted phonetically) that begin with *Kawamoto* in both Kanji and Kana.

Note. The phonetic value is the same as the base name value.



Personal Data - Find an Existing Value search page

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 (alternate character name) reside in the PERSONAL_DATA record and the related language table, PERS_DATA_LANG (personal

data language). This architecture allows the same field to be used differently for different language codes.

Alternate Character Fields Associated With Global Pages

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

Page	*Auxiliary Page*	*Field*	*Comments*
BANK_BRANCH_EC		BRANCH_NAME_AC	
BANK_EC		BANK_NAME_AC	
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	

Page	*Auxiliary Page*	*Field*	*Comments*
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	
PYE_BANKACCT		ACCOUNT_NAME_AC	
SRC_BANK		ACCOUNT_NAME_AC	
STATE_NAMES_TBL	STATE_ACDESCR_SEC	DESCR_AC	
TRN_INSTRUCTR_TBL1	TRN_INS_ACNAME_SEC	NAME_AC	
NAMES	NAMES_ACPREFNM_SEC	NAME_AC	

Search Records With Alternate Character Name Fields

The following PeopleSoft Human Resources search records that have NAME_AC (alternate character name) as an alternate search key or subrecords that are included in search records, allow for Japanese input and display:

- 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

Note. This list includes only Human Resources system records.

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 the report language are configured as shown:

Base Language Set To	*Report Language Set To*	*Report Sorted By*
English	Japanese	RELLANG.NAME_AC
Japanese	Japanese	BASE.NAME_AC
English	English	BASE.NAME
Japanese	English	RELLANG.NAME

SQR/Crystal Reports

These SQR/Crystal reports are sorted phonetically for Japanese, based on the report and the 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

Note. This list doesn't include country-specific regulatory reports that are sorted by Name.

PeopleSoft Human Resources Reports That Support Japanese Name Formatting

These reports display space-delimited Japanese names when the report is run with Japanese as 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
POS008	Position Exceptions or Overrides

CHAPTER 6

Setting Up PeopleSoft HRMS

This chapter provides an overview of setting up your PeopleSoft Human Resources Management System (HRMS) and tells you how to:

- Administer country codes.
- Set up implementation defaults.

Understanding PeopleSoft HRMS

In PeopleSoft HRMS, users can access the same basic information at the same time and yet maintain data accuracy and integrity. You maintain critical general data, such as companies, work locations, and system specifications, in a central location in PeopleSoft Human Resources through the use of *control tables.*

Using control tables:

- When users perform tasks for a PeopleSoft HRMS function, they use the same general information, so you eliminate duplicate entries and keep the data virtually error-free.
- You make data available to users of all of your PeopleSoft HRMS applications.

This saves time and prevents data entry errors.

- You can update information anytime and still maintain a record of historical information to track changes.
- You can enter information before it takes effect to prepare for changes in advance.

In this chapter we outline how to set up the Country and Installation control tables. Setup of other PeopleSoft HRMS control tables is described in the following chapters:

- Setting Up and Using Frequencies
- Setting Up Local Country Functionality
- Setting Up Companies, Agencies, and Locations
- Setting Up Payroll Tax Tables
- Setting Up Banks and Bank Branches
- Setting Up Jobs and Pay Groups

- (USF) Setting Up Human Resources Management Tables

Setting Up Business Unit and SetID Functionality

You must set up at least one business unit and setID.

See Also

"Regulating PeopleSoft HRMS System Data"

Understanding Effective Dates

In many control tables and other tables in PeopleSoft Human Resources, you set an effective date to indicate when the data becomes valid.

This requirement serves the following purposes:

- You can maintain a complete chronological history of your data and tables, whether you changed them two years ago or want them to change in two months. You can roll back your system to a particular time to perform analyses for your company. Or you can set up tables and data ahead of time: You don't need a tickler file or a pending file to remind you to enter data in the future.

- The system compares pages and tables to make sure that prompt tables list only data that is valid as of the effective date of the page you're working on. For example, you create a new department code with an effective date of May 1, 1998. Then, on the Job Data pages, you enter a new data row for an employee with an effective date before May 1, 1998. When you select a department, you won't see the new code as a valid choice because it isn't in effect.

Driving Your System by Employee or Position

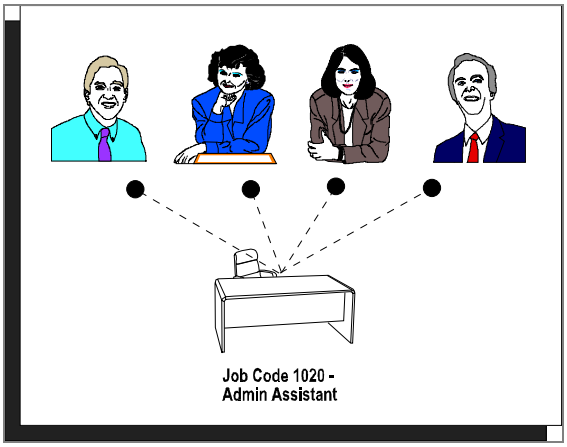
In PeopleSoft Human Resources, you can focus on either the employees in your company or the positions that they hold. Before you set up default information in the control tables, you must decide which method to use. The system processes the information differently depending on your choice.

What's the Difference?

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

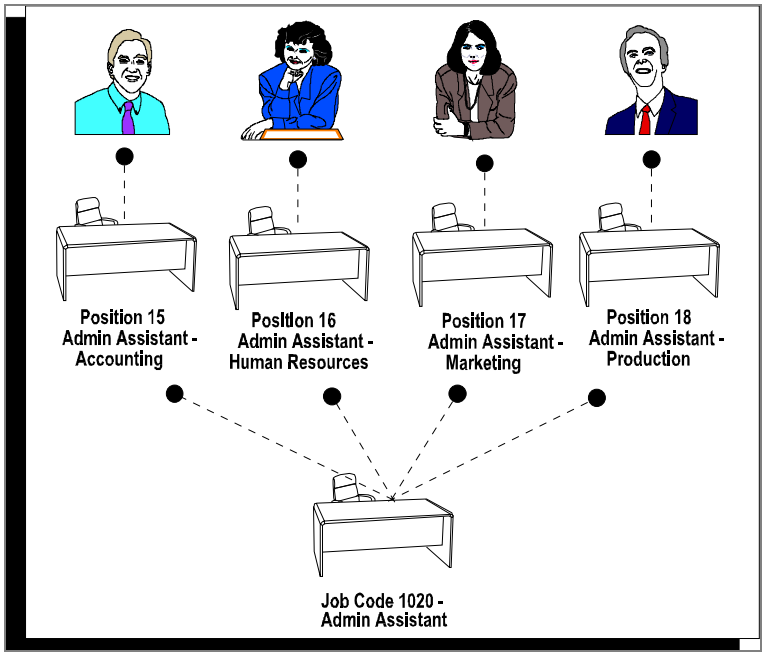
You can have several positions in the same job code; positions track details of a particular job in a specific department or location. For example, in job code 1020, Administrative Assistant, you can define different administrative assistant positions with different position numbers—one in your marketing department, one in research, and one in your compensation group. Positions usually have a one-to-one relationship with employees.

In contrast, job codes primarily have a one-to-many relationship with employees. Many employees share the same job code, even though they might perform the work in different departments, locations, or companies. You identify the job that an employee performs through the data that 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 that is related to a position, such as a phone number or mail stop, regardless of whether an employee actually fills that position. And you use data that is specific to each position as the basis for organization planning, recruitment, career planning, and budgeting.



Driving PeopleSoft Human Resources by 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 differently according to whether you drive it by employee or position. 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 (that is, if you tend to look at broader groups of employees and create new jobs often), then driving the system by employee is probably best for you.

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

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

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

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

For example, you might find that driving the system by position works well for some departments or management levels in your company and that driving the system by

employee works well for others. If so, you can use both methods with a setting called *partial position management.*

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

Considerations for PeopleSoft Pension Administration, Payroll, and Benefits

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

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

See Also

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

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

Administering Country Codes

This section describes how to:

- View and update country information.
- Specify the address format for a country.
- Specify the county, state, and city for a country.
- Add the state, province, or equivalent entity for a country.

On many pages in PeopleSoft Human Resources, a country appears as part of the address for a person, a company, or an office. Countries are represented as codes, such as CAN for Canada, and they are listed in the Country Table. In the Country field on any page, the system displays a default country code, which you can change. The Primary Permission List Preferences and the HR Business Unit Defaults pages can affect this default code. You can define the information that users should capture for addresses in specific countries using the Address Format page in the Country component.

You need codes for all the countries where your organization does business and where your employees live. The Country Description page includes an extensive list of predefined countries and codes. The page is updated with each release of PeopleSoft Human Resources according to the countries that are recognized by the International Standards Organization (ISO).

If you need a new country code, notify your PeopleSoft account manager so that we can add it to the Country Table for the next release of PeopleSoft Human Resources.

See Also

"Regulating PeopleSoft HRMS System Data"

Understanding Enterprise Integration Points

When you save changes to the Country Table, it publishes the Country Table enterprise integration point (EIP).

The HR State Table can either publish or subscribe to the State Table EIP. When you save changes to the State Table, it publishes the State Table EIP.

After HR publishes the data, other products can subscribe to it, keeping country codes, address data, and state codes synchronized across applications.

See Also

PeopleSoft Enterprise Integration PeopleBook

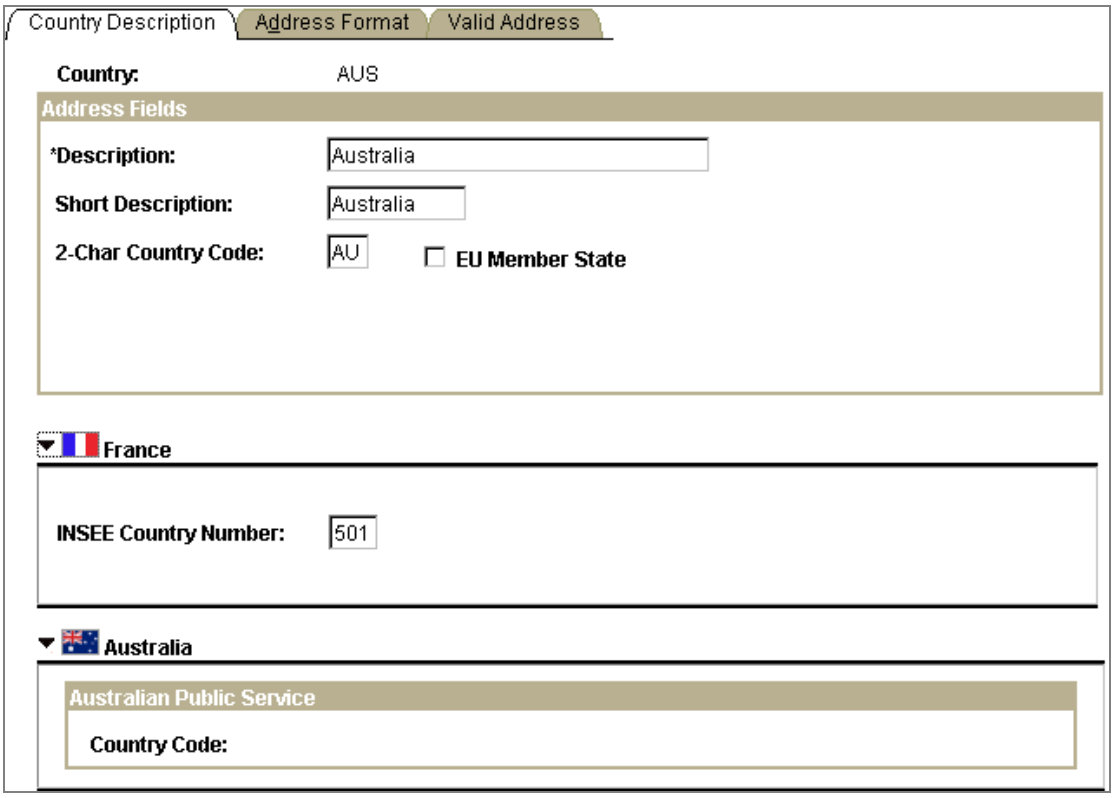
Pages Used to Administer Country Codes

Page Name	*Object Name*	*Navigation*	*Usage*
Country Description	COUNTRY_DEFN	Define Business Rules, Define General Options, Setup, Country Table, Country Description	View or update country information.
Address Format	ADDR_FORMAT_TABLE	Define Business Rules, Define General Options, Setup, Country Table, Address Format	Specify the address format for the country that is selected from the Country Table.
Valid Address	EO_ADDR_VALIDAT	Define Business Rules, Define General Options, Setup, Country Table, Valid Address	Specify the county, state, and city for the country that is selected from the Country Table.

Page Name	Object Name	Navigation	Usage
State or Province Table	STATE_NAMES_TABLE	Define Business Rules, Define General Options, Setup, State or Province Table, State or Province Table	Add a state, province or equivalent entity for the country that is selected from the Country Table.

Viewing or Updating Country Information

Access the Country Description page.



Country Description page

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

EU Member State (European Union member state) Select if this is an EU member state. This field is for your reference only and doesn't impact system processing or reporting.

(CAN) Stats-Can Location Code (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 does not 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.

(FRA) France

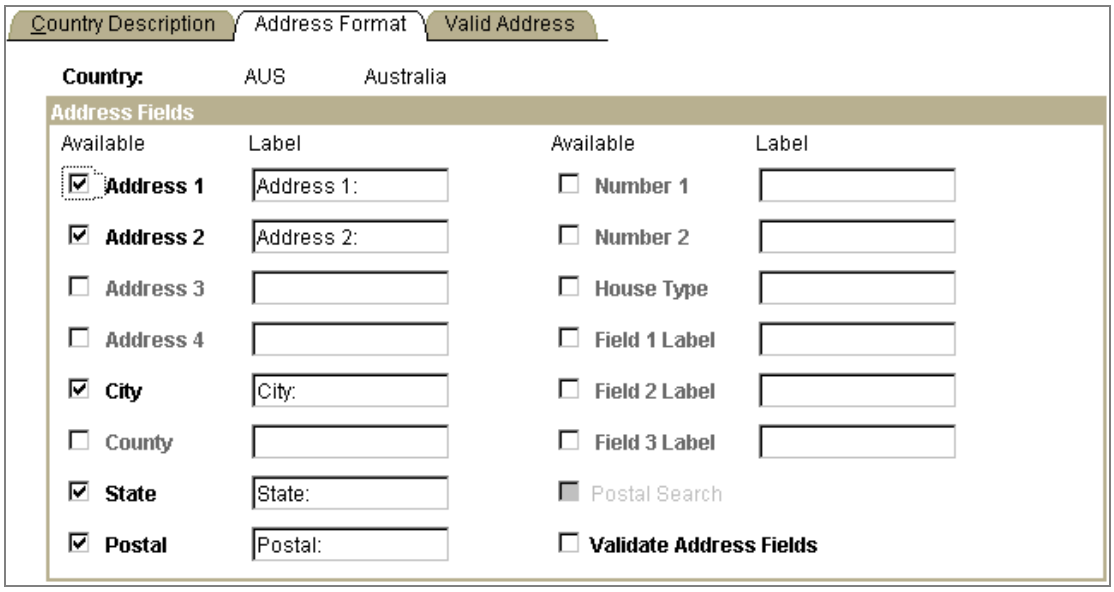
INSEE Country Number (National Institute for Statistical and Economic Studies country number) INSEE is an official statistics and economics organization in France. This organization issues a number that is used by the tax authorities, Social Security, the Chamber of Commerce, and others to identify an enterprise and its entities.

(AUS) Australia

Australian Public Service Enter the Australian Public Service four digit country code here.

Specifying the Address Format for a Country

Access the Address Format page.



Address Format page

Country Select the appropriate check boxes to specify how to construct address pages in PeopleSoft HRMS. The standardized address page that you create for a country is used on transaction pages in the system. The country code is always the first field on the address page. When you

	select a country from the list of values, the system changes the address format to the standard format for that country.
Available and **Label**	Select the appropriate **Available** check boxes to activate a corresponding address field and its label as part of the standard address format for this country. The system displays the text that you enter in an activated **Label** field as the field label on the address page for this country.
Postal Search	Select to activate postal searching functionality for Dutch, Japanese, or UK addresses. For the UK, when you select this check box, the system makes the fields in the **GB Systems Information** group box available for entry.

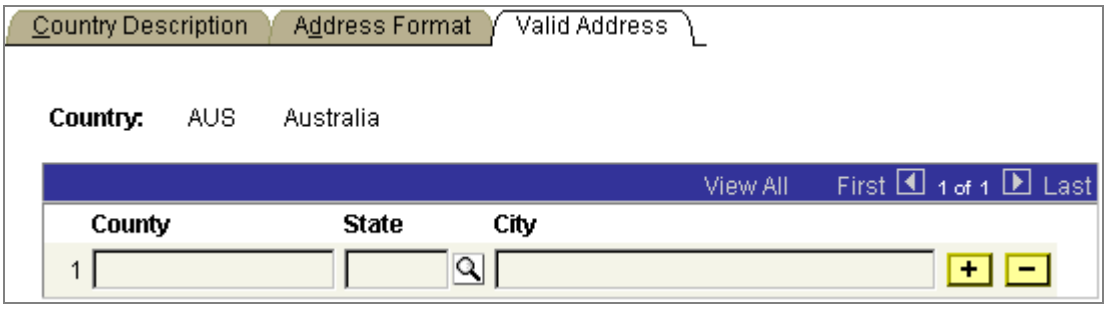
GB Systems Information

The system displays this group box only for UK addresses (GBR country code). Complete these fields if you have installed and configured the Information Management Toolkit (IMTK). With the 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).

Specifying the County, State, and City for a Country

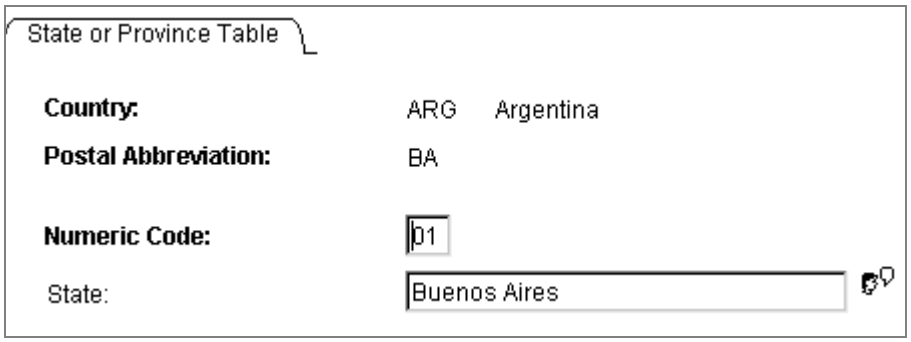
Access the Valid Address page.



Valid Address page

Adding the State, Province, or Equivalent Entity for a Country

Access the State or Province Table page.



State or Province Table page

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. PeopleSoft updates this table with each release.

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

Postal Abbreviation The state or province code is automatically displayed.

Numeric Code Enter the numeric code, if applicable. The U.S. federal government assigns a numeric code to each state for reporting purposes. You don't need to enter numeric codes for new Canadian provinces.

See Also

Specifying the Address Format for a Country

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; this information is *required.*

This section describes how to:

- Specify the PeopleSoft applications that you're using as part of your installation.
- Specify how to drive your system: by employee, by position, or both.
- Enter product- and industry-specific installation information.
- Enter country-specific information.
- Specify which local country functionality to activate for users.

- Specify the number that the system uses to start assigning numbers.
- Assign a national ID type to a country code.
- (USF) Set up PeopleSoft HRMS for federal functionality.
- Set up HRMS options on the PeopleTools Options page.

Warning! You must complete the information on the Primary Permission List Preferences page for each Primary Permission List. Most of the defaults in PeopleSoft HRMS come from the Primary Permission List Preferences page and not the Installation Table pages. Other PeopleSoft HRMS applications have defaults that are based on the Installation Table settings. However, in PeopleSoft Human Resources, all defaults are based on the settings that you make on 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.

When you access the Installation Table pages for the first time, you'll see that PeopleSoft has already entered information for a sample company that you can use as a guide. After you enter your installation information, log off to save your changes.

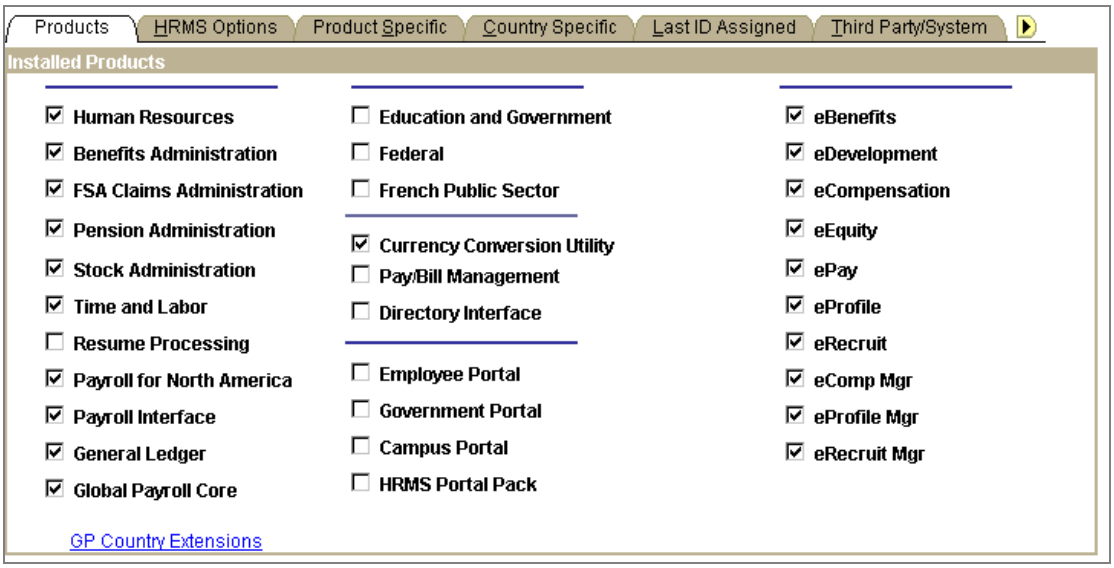
Pages Used to Set Up Implementation Defaults

Page Name	*Object Name*	*Navigation*	*Usage*
Products	INSTALLATION_TBL1	Define Business Rules, Define General Options, Setup, Installation Table, Products	Specify the PeopleSoft applications for your installation.
HRMS Options	INSTALLATION_TBL1B	Define Business Rules, Define General Options, Setup, Installation Table, HRMS Options	Specify how to drive your system: by employee, by position, or both. Enter the PeopleSoft HRMS defaults that are related to your organizational policies.
Product Specific	INSTALLATION_TBL1A	Define Business Rules, Define General Options, Setup, Installation Table, Product Specific	Enter product- and industry-specific installation information.
Country Specific	INSTALLATION_TBL3	Define Business Rules, Define General Options, Setup, Installation Table, Country Specific	Enter country-specific installation information.

Page Name	Object Name	Navigation	Usage
Installed HR Countries	INSTALLATION_SEC	Click the Installed Countries link on the Installation Table - Country Specific page.	Specify which local country functionality to activate for users in PeopleSoft Human Resources.
Last ID Assigned	INSTALLATION_TBL2	Define Business Rules, Define General Options, Setup, Installation Table, Last ID Assigned	Specify the number that the system uses to start assigning numbers.
Third Party/System	INSTALLATION_TBL4	Define Business Rules, Define General Options, Setup, Installation Table, Third Party/System	Set the criteria for gathering statistics and activate the SQR security for PeopleSoft HRMS. Define parameters for using third-party applications such as Visio.
Alternate Character	ALT_CHAR_TBL	Define Business Rules, Define General Options, Setup, Installation Table, Alternate Character	Specify the language code and alternate character type.
National ID Type Table	NID_TYPE_TABLE	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	Assign a national ID type to a country code and provide a default or a dummy national ID for a country to use when an employee or applicant ID is unavailable.

Selecting PeopleSoft Applications for Your Installation

Access the Products page.



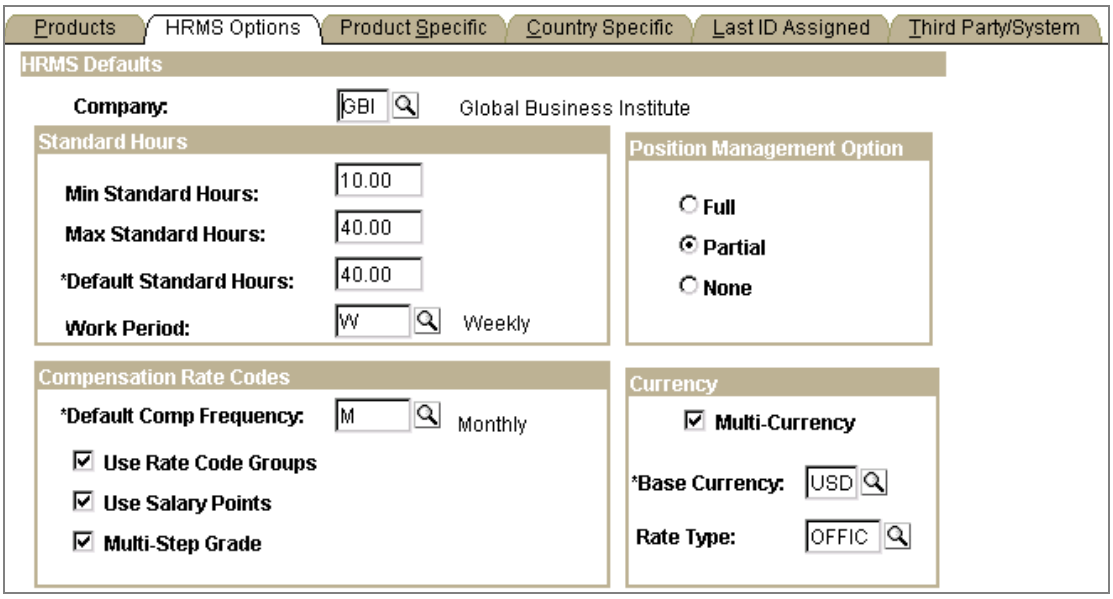
Products page

Select the products you are installing. To access that product's functionality, you must select it on this page.

If you are implementing PeopleSoft Global Payroll, select the GP Country Extensions link to select the Global Payroll Country Extensions you are implementing.

Selecting HRMS Options

Access the HRMS Options page.



HRMS Options page

HRMS Defaults

Company Select the default company code. The system uses this default in several tables in PeopleSoft Human Resources.

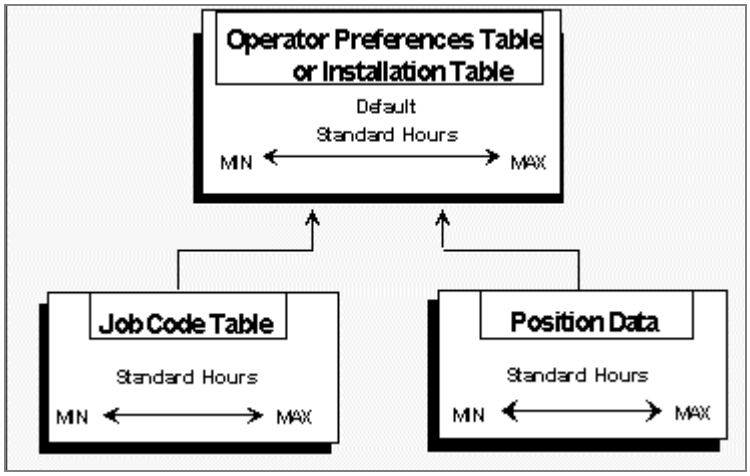
For a single-company organization, enter the code for that company; for multicompany environments, determine which company is most appropriate.

Standard Hours

To use this functionality to control payroll input in PeopleSoft Global Payroll, review your payroll and make sure that the elements reference the appropriate PeopleSoft Human Resources items. The system does not use them automatically.

Min Standard Hours (minimum standard hours) Enter the minimum standard hours that employees are expected to work per week.

Max Standard Hours (maximum standard hours) Enter the maximum standard hours that employees are expected to work per week.



Minimum and maximum standard hours

Default Standard Hours Enter the number of hours in a normal workweek at the company. This is a required field. When you define new primary permission list preferences for a primary permission list, the standard hours appear by default from the Installation Table. The value that you enter also becomes the default standard hours value for a job in the Job Code Table and the default standard hours value in 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 appear as the default on the Position Data pages.

PeopleSoft Human Resources uses standard hours to compute a full-time equivalency (FTE) value to prorate holiday hours and pay for part-time and hourly employees.

	To compute the FTE value, the system 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 time period in which employees must complete the standard hours). Values are stored on the Frequency Table. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE.

Position Management Option

To drive part or all of the system by position, change the setting in this group box.

If you use PeopleSoft Pension Administration, don't use position management for your retiree organization. If you use position management for your employees, select **Partial** to exclude retiree departments.

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

Full	The system expects that you track position data for all employees in your organization and that you drive your human resource system by position, not by employee.
Partial	The system uses whatever position data is available, but doesn't require that you track your entire organization using position management. Select to use the module on a trial basis or for selected departments.
None	You drive your system by employee. You can still assign position numbers to employees, but the system doesn't use position data for employee records, such as Work Phone or Mail Stop ID. This is helpful for tracking only certain positions, such as those above a particular management level.

Compensation Rate Codes

Default Comp Frequency (default compensation frequency)	Select the value to use for reporting salaries. This field is required. The system also uses this value as the default compensation frequency in the Job Code Table.
Use Rate Code Groups	Select if your organization bundles rate codes to apply percentages when calculating compensation.
Use Salary Points	Select if your organization uses rate codes that have the rate code type points.

Multi-Step Grade — Select if your organization uses a multistep/grade salary plan. This causes the system to use the Salary Step Table to determine employee compensation rates.

Currency

Multi-Currency — Select if you use different types of currency to pay employees. This option affects only PeopleSoft Payroll for North America. PeopleSoft Global Payroll uses a separate multicurrency in the payroll system.

Note. Select the Multi-Currency check box on the PeopleTools Options page.

Base Currency — Select a currency code from the values in the Currency Code Table. The code you select is the default currency that the system uses to calculate compa-ratios (percent through range calculations) and all total amounts on pages and reports for PeopleSoft Human Resources and PeopleSoft Payroll for North America, regardless of the currency that is used for individual line items.

For example, if the U.S. dollar is your base currency, but your global salespeople submit expense reports in French francs, the system calculates the expense total in U.S. dollars by internally converting all line item amounts to U.S. dollars and displaying the total in U.S. dollars.

Note. All currency defaults in PeopleSoft Human Resources are based on the base currency that you indicate on the Installation Table page, not the Primary Permission List Preferences page. The Primary Permission List Preferences page doesn't affect the currency defaults on the local country pages.

Rate Type — Identify the default rate type on which your currency conversion is based. Do this only if you haven't specified a default rate type for a primary permission list on the Primary Permission List Preferences page. The system checks the Primary Permission List Preferences page for a default rate type first; if none is specified, it looks at this value.

See Also

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

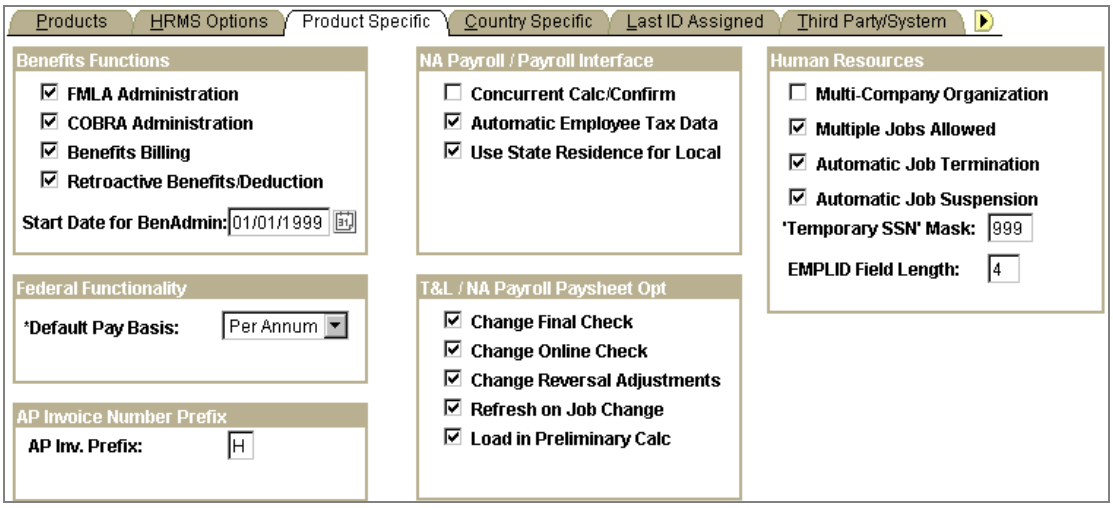
Driving Your System by Employee or Position

PeopleSoft Human Resources PeopleBook: Plan Salaries

Working With Currencies

Entering Product- and Industry-Specific Installation Information

Access the Product Specific page.



Product Specific page

Benefits Functions

FMLA Administration (Family Medical Leave Act), **COBRA Administration** (Consolidated Omnibus Budget Reconciliation Act administration), **Benefits Billing,** and **Retroactive Benefits / Deductions**

Select to activate these different types of benefits functionality.

Start Date for BenAdmin (start date for Benefits Administration)

Enter the start date in PeopleSoft date format: MM/DD/YYYY.

NA Payroll / Payroll Interface (North American Payroll and Payroll Interface)

Concurrent Calc/Confirm (concurrent calculation and confirmation)

Select to enable the system to run a calculation and confirmation at the same time. It is possible for an employee to be in two concurrent runs; this could cause a deadlock situation where the process ends abnormally.

Automatic Employee Tax Data

Select to enable the system to create employee federal, state, and provincial tax records automatically whenever the following criteria are met:

- You hire an employee.
- An employee has a job change requiring a new work

	tax location. • You add a concurrent job that requires a new work tax location for an employee. • You hire an employee from the Applicant Tracking System. • An employee transfers to a new company.
Use State Residence for Local	Automatically selected when you select **Automatic Employee Tax Data**. Leave this field selected to assume that an employee is a resident of any local tax jurisdiction that happens to be located in the employee's state of residence. If this assumption is not true, deselect this field to prevent resident local taxes from being erroneously deducted from an employee's paycheck.

Human Resources

Multi-Company Organization	Select if your organization comprises more than one company. Select if you use PeopleSoft Pension Administration, because you set up companies specifically to house your pension payees.
Multiple Jobs Allowed	Select to set up multiple, concurrent jobs for employees in your organization. For example, you work for a university where the dean of the Marketing Department is also a professor.
Automatic Job Termination	Select to automatically terminate any job that has an end date. The system does this by creating a termination row for the job.
Automatic Job Suspension	Select to activate substantive job suspension for employees working in temporary assignments where the substantive job requires suspension for the duration of the assignments. The Multiple Jobs Allowed checkbox must also be selected if you want to select this option.
'Temporary SSN' Mask (temporary Social Security number mask)	Enter a three-digit number to be a default Social Security number for all applicants or employees whose Social Security numbers are unavailable. Assign a value that is greater than 800 so that the temporary number doesn't conflict with valid Social Security numbers.
EMPLID Field Length (employee ID field length)	Enter the number of characters to be used for employee IDs.

(USF) Federal Functionality

Default Pay Basis — For the **Default Pay Basis,** select the value to use for quoting and reporting salaries. This field is required if you selected Federal on the Products page.

AP Invoice Number Prefix (Accounts Payable number prefix)

AP Inv. Prefix (Accounts Payable invoice prefix) — Enter a prefix to be used for accounts payable invoices.

T&L/NA Payroll Paysheet Opt (Time and Labor and Payroll for North America paysheet options)

Change Final Check, Change Online Check, and **Change Reversal Adjustments** — Select to enable payroll users to make paysheet changes to data that is retrieved from PeopleSoft Time and Labor. PeopleSoft recommends not selecting these check boxes because changes that are made directly to the paysheets aren't transmitted to PeopleSoft Time and Labor.

Refresh on Job Change — If you select this check box, and the Job Paycheck box on the paysheet is selected, a job change (such as a change in department) causes payable time from PeopleSoft Time and Labor to be reloaded into PeopleSoft Payroll for North America. This occurs when the paysheet is rebuilt.

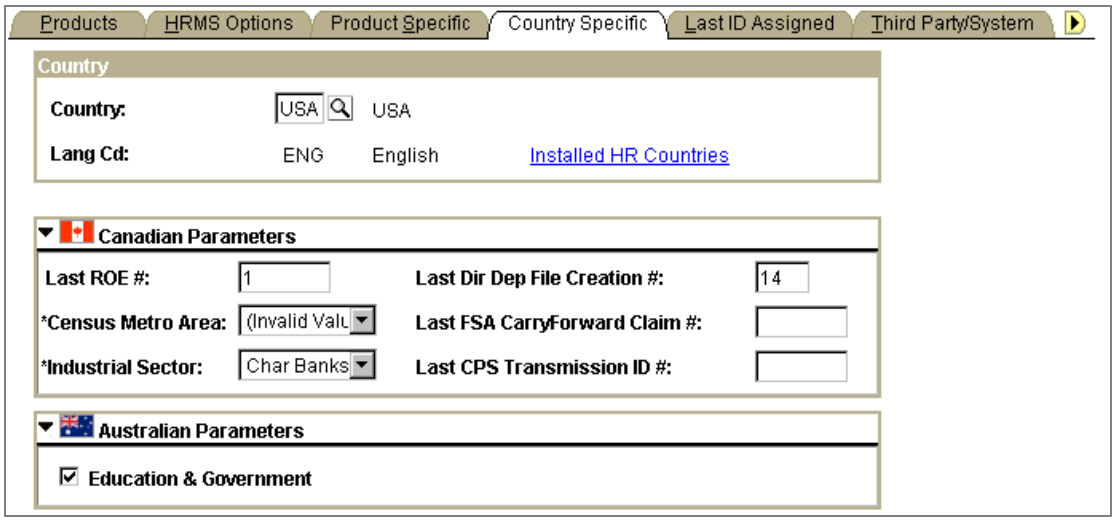
Load in Preliminary Cal (load in preliminary calculations) — Select to have PeopleSoft Payroll for North America load PeopleSoft Time and Labor data each time that a user initiates the preliminary Pay Calculation process. The system loads only the payable time that was not previously sent to PeopleSoft Payroll for North America.

See Also

PeopleSoft Benefits Administration PeopleBook, "Introduction to Benefits Administration," Activating Automated Benefits

Entering Country-Specific Installation Information

Access the Country Specific page.



Country Specific page

Country

Lang Cd (language code) Displays base language spoken in the selected country.

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

(CAN) Canadian Parameters

Last ROE # (last record of employment number), **Last Dir Dep File Creation #** (last direct deposit file creation number), **Last FSA CarryForward Claim #** (last flexible spending account carry-forward claim number), and **Last CPS Transmission ID #** (last CPS transmission ID number)

Enter the last ROE, direct deposit file, flexible spending account carry-forward claim, and CPS transmission ID numbers that were used.

The system increases each number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. These values are used in PeopleSoft Payroll for North America when running a Canadian payroll.

Census Metro Area (census metropolitan area) Enter the Census Metro Area (CMA) code that is prescribed by Statistics Canada for this location. The system uses the default CMA code that you enter only if no default CMA code is specified on the Primary Permission List Preferences page. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required for Canadian companies.

Industrial Sector Used for Canadian employment equity purposes. The system uses the default value that you enter only if no default industrial sector is specified on the Primary

Permission List Preferences page. 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.

(AUS) Australian Parameters

Education & Government Select this check box for Australian public service organizations.

Selecting Local Country Functionality

Access the Installed HR Countries page.



Installed HR Countries page

The system displays a flag for each country that has special local functionality in PeopleSoft Human Resources:

- Select a check box to activate local functionality for that country. Users can see and work with that country's local functionality.
- Clear a check box to hide that local functionality from your users.

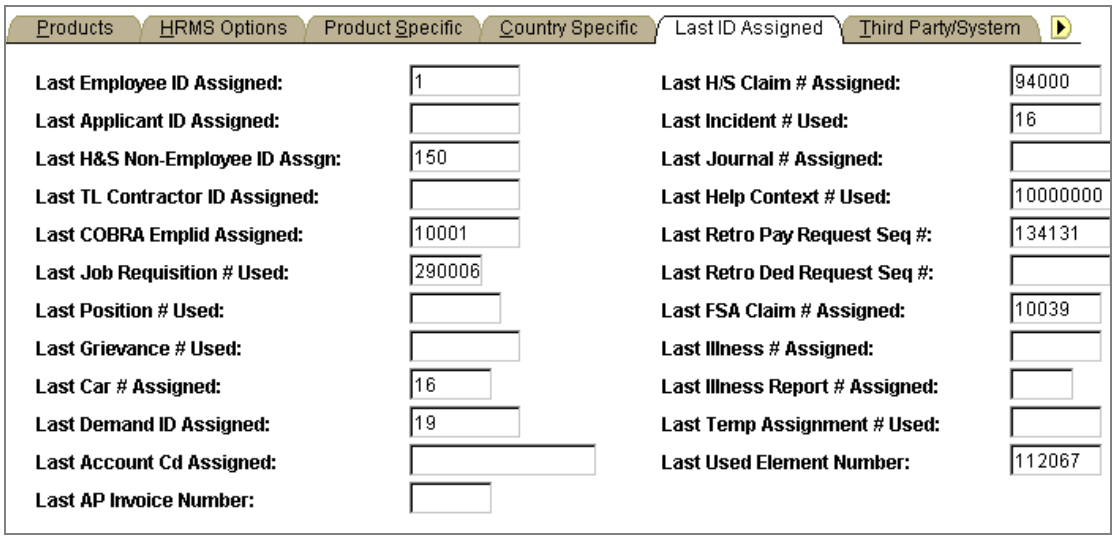
If the check box for a country is selected on this page, but you don't grant country access to the users' primary permission list on the Maintain Global Security – Global Panels page, users will not see local country functionality.

See Also

"Administering PeopleSoft Security," Setting Up Security for Applicant Self-Service Transactions

Specifying the Starting Number for System-Assigned Numbers

Access the Last ID Assigned page.



Last ID Assigned page

In PeopleSoft Human Resources, there are several fields where you can either enter numbers manually or let the system assign them.

The following table lists auto-numbering fields.

Field	*Application*	*Business Process*
Last Employee ID Assigned	PeopleSoft Human Resources	Administering Workforce Recruiting Workforce
Last Applicant ID Assigned	PeopleSoft Human Resources	Recruiting Workforce Planning Successions
Last H&S Non-Employee ID Assgn	PeopleSoft Human Resources	Monitoring Health and Safety Administering Training
Last TL Contractor ID Assigned	PeopleSoft Time and Labor	Administering Workforce Recruiting Workforce
Last COBRA Emplid Assigned	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Administering COBRA
Last Job Requisition # Used (last job requisition number used)	PeopleSoft Human Resources	Recruiting Workforce
Last Position # Used	PeopleSoft Human Resources	Managing Positions Planning Successions

Field	*Application*	*Business Process*
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 Account Cd Assigned	PeopleSoft Human Resources	
Last AP Invoice Number	PeopleSoft Human Resources	
Last H/S Claim # Assigned	PeopleSoft Human Resources	Monitoring Health and Safety
Last Incident # Used	PeopleSoft Human Resources	Monitoring Health and Safety
Last Journal # 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 Administration PeopleSoft Human Resources: Base Benefits	Manage Retroactive Benefits/Deductions
Last FSA Claim # Assigned	PeopleSoft FSA Claims Administration	Administer FSA
Last Illness # Assigned	PeopleSoft Human Resources	Monitor Absence
Last Illness # Report Assigned	PeopleSoft Human Resources	Monitor Absence
Last Temp Assignment # Used	PeopleSoft Human Resources	Administer Workforce
Last Used Element Number	PeopleSoft Human Resources	Manage Competencies

To let the system assign numbers for the fields on this page, enter the last number that you used in the field. The system increases that number by one when it assigns a new number. The system updates the Installation Table every time it assigns a number.

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

Employee ID Considerations

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

To always enter applicant and employee IDs manually, enter *999999999* (nine 9's) in the Last Employee ID Assigned and Last Applicant ID Assigned fields.

If you use employee Social Security or insurance numbers as employee IDs, change the formatting for the Employee ID field using PeopleSoft Application Designer.

Zero-filled Numbers

To make data entry faster and more accurate on several pages, when you enter a number that the system has assigned, the system enters zeros before the number. For example, when you enter *4,* you see *00000004,* a total of 8 characters per number. This occurs in the following fields:

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

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

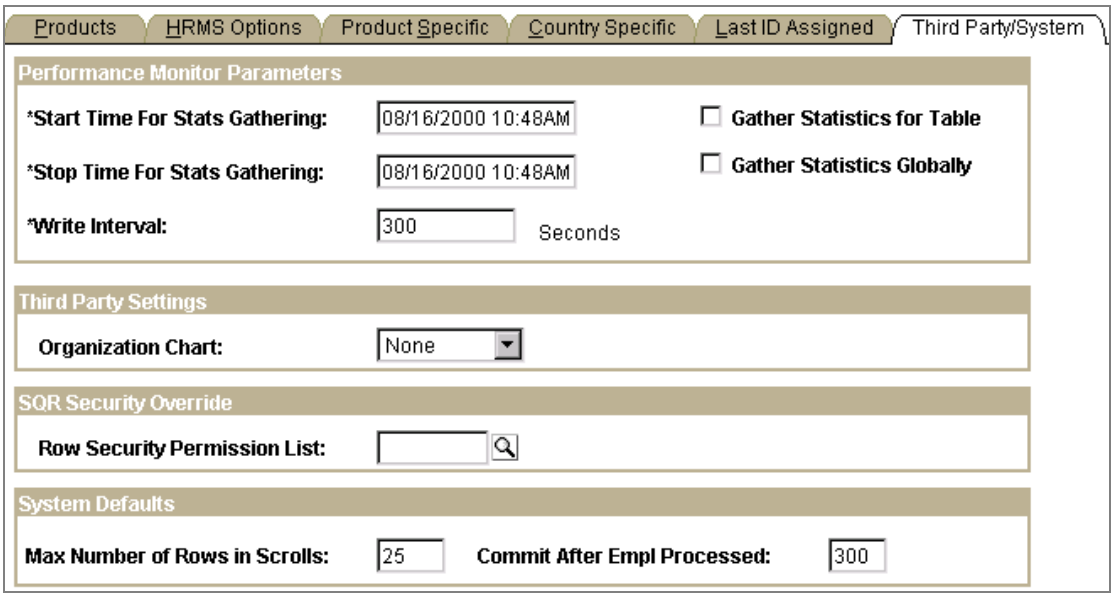
Note. For more information about data conversion, ask your human resources project leader or see the PeopleSoft Application Designer documentation.

See Also

PeopleTools PeopleBook: Application Designer

Defining Parameters for Using Third-Party Applications

Access the Third Party/System page.



Third Party/System page

Performance Monitor Parameters

Start Time For Stats Gathering (start time for statistics gathering) and **Stop Time For Stats Gathering** (stop time for statistics gathering)
Enter the date and time of the start and stop.

Gather Statistics for Table
Select to gather statistics locally.

Write Interval
Enter the number of seconds for gathering the statistics.

Third Party Settings

Organization Chart
Enter the type of third-party program you use to create organizational charts with your human resources data.

SQR Security Override

Row Security Permission List
Enter the list that controls user access to SQRs.

Note. This permission list, if entered, overrides a user's row security permission list for SQR processing.

System Defaults

Max Number of Rows in Scrolls (maximum number of rows in scrolls)
Enter the maximum number of rows in a scroll-controlled data box for third-party systems.

Commit After Empl Processed (commit after employee processed) — Enter the maximum number of employees that a third-party system processes before committing.

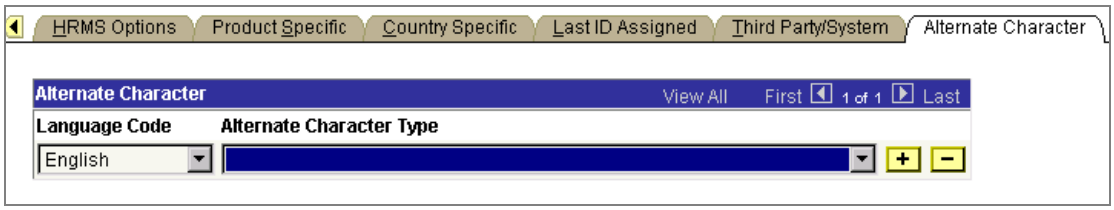
See Also

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities," Performance Monitoring

"Setting Up Companies, Agencies, and Locations," Building Organization Charts

Entering Alternate Character Types

Access the Alternate Character page.



Alternate Character page

Note. Because you are setting the alternate character code on the Installation Table, the setting affects your entire HRMS application configuration. Make sure that you account for all language codes for your installation.

If you don't specify an alternate character type for a language code that a user is working with, and the user tries to enter characters in an Alternate Character field, a warning message appears.

If you specify an alternate character type for a language code, and a user enters any other character type in an Alternate Character field, a warning message appears.

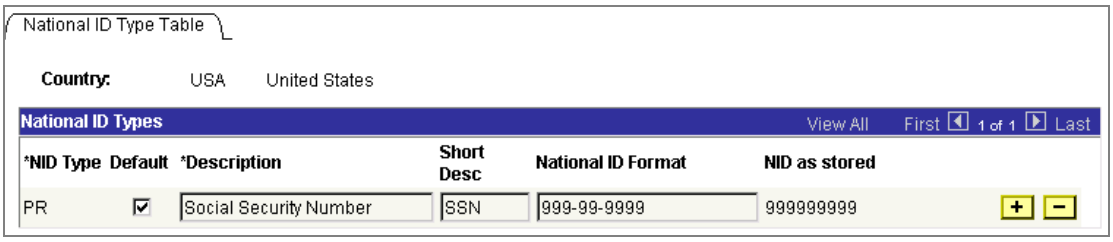
Note. You can ignore the warning message and enter the data in another character set, but problems can occur when data is sorted in multiple alternate character sets.

See Also

"Working with Languages," Working With Double-Byte Characters

Assigning a National ID Type to a Country Code

Access the National ID Type Table page.



National ID Type Table page

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 number, and U.S. workers have a Social Security number. Each type of national ID has unique formatting requirements.

When you select a country code on any global page where you are entering a national ID, the system refers to the information defined on this page.

This page is already set up for tracking the proper national ID type for Belgium, Canada, France, Germany, Italy, Japan, Mexico, the Netherlands, Spain, Switzerland, the UK, and the U.S. You can also use it to add new countries to the table or modify existing country ID information.

NID Type

Enter ***PR*** (payroll identification) or ***NO*** (none). This value controls the default national ID type when you select a national ID country on the pages 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, so ***NO*** is their default value.

National ID Country and NID Type fields are configured so that users can select only ***PR*** if the national ID type is for that country is set to ***PR*** on this page.

When you select a country code on any 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 field information by referring to any special UDF formatting information that is defined in PeopleSoft Application Designer for that country's national ID. The system formats your National ID field entry accordingly.

For example, if you enter national ID information for a new employee on the Eligibility/Identity page, and you select a national ID country of *USA,* the system uses the national ID type ***PR*** as the default. It also formats your 9-digit Social Security number (SSN) as *999-99-9999* to comply with the UDF formatting that is set for U.S. SSNs in PeopleSoft 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.
Default	Select to have the information that you entered in the **National ID Format** field be the default number for applicants or employees whose national IDs are unavailable.
National ID Format	Indicate the default format for the national ID that you've added. Enter ***9*** as the placeholder for a number and ***A*** as the placeholder for a letter. For example, for a U.S. Social Security number or a Canadian Social Insurance number ID, you enter ***999999999*** because U.S. Social Security numbers and Canadian Social Insurance numbers consist of 9 digits. For a UK National Insurance number, you enter ***AA999999A*** because those numbers consist of 2 letters followed by 6 digits and a final letter.
NID as stored (national ID as stored)	Shows how the NID is stored in the system.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Establishing Work Eligibility

(USF) Setting Up PeopleSoft HRMS for Federal Functionality

To set up your database for U.S. federal government functionality, select *Federal* on the Installation Table - Products page and update the Primary Permission List Preferences Table to point to the U.S. federal government industry and sector.

Make your primary permission list preference changes on the Settings page of the Primary Permission List Preferences component. To set up a federal database, select an Industry of Government and an Industry Sector of *US Federal.*

See Also

"Regulating PeopleSoft HRMS Data," Primary Permission List Preferences page

Setting Up HRMS Options on the PeopleTools Options Page

You use the PeopleTools Options page to set a variety of values that are related to:

- Multiple jobs functionality.
- Multicompany organizations.

- Organizations that conduct business using more than one currency.

Select the following check boxes, as applicable, to activate these kinds of functionality:

Multi-Jobs Allowed

Select if employees can have multiple, concurrent job assignments in your organization; for example, if the dean of the Graduate Division is also a professor of Business Administration or if you maintain different sets of records for the same person. If you select this check box, the system enables the use of the Empl Recd# (employee record number) field when you search for data and open various pages in PeopleSoft Human Resources.

If you use PeopleSoft Pension Administration, you *must* select this check box. When you retire an employee with PeopleSoft Pension Administration, the system creates an additional, concurrent job that is 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.

Note. If you select **Multi-Jobs Allowed,** add Add Concurrent Job as an option to the Use menu on the Administer Workforce pages that use PeopleTools Object Security.

Multi-Company Organization

Select if your organization comprises more than one company or if you use PeopleSoft Pension Administration to set up companies specifically to house your pension payees.

Multi-Currency

Select to enter data in more than one currency. For example, if you have offices in the United States and Italy, you may want to calculate pay rates in both U.S. dollars and Italian lira. If you select **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.

See Also

*PeopleSoft Pension Administration PeopleBook, "*Establishing Pension Payees"

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information"

PeopleTools PeopleBook: Security

CHAPTER 7

Setting Up and Using Frequencies

This chapter provides an overview of frequency and tells you how to:

- Define frequency.
- Use frequency.
- Understand calculations for frequency conversion.

Understanding Frequency

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

Frequency IDs are used in PeopleSoft Human Resources, Global Payroll, and Payroll for North America. Each frequency ID has an associated annualization factor that represents the number of times that the period occurs in the course of a year. The system provides several standard frequencies such as hourly, daily, monthly, and so on.

Defining a Frequency

This section describes how PeopleSoft HRMS defines frequency and uses it to perform compensation rate conversions as well as payroll and job rate calculations.

Page Used to Define a Frequency

Page Name	*Object Name*	*Navigation*	*Usage*
Frequency Table	FREQUENCY_TBL	Define Business Rules, Define General Options, Setup, Frequency Table, Frequency Table	Define a frequency ID, its frequency type, and its annualization factor.

Understanding Enterprise Integration Points

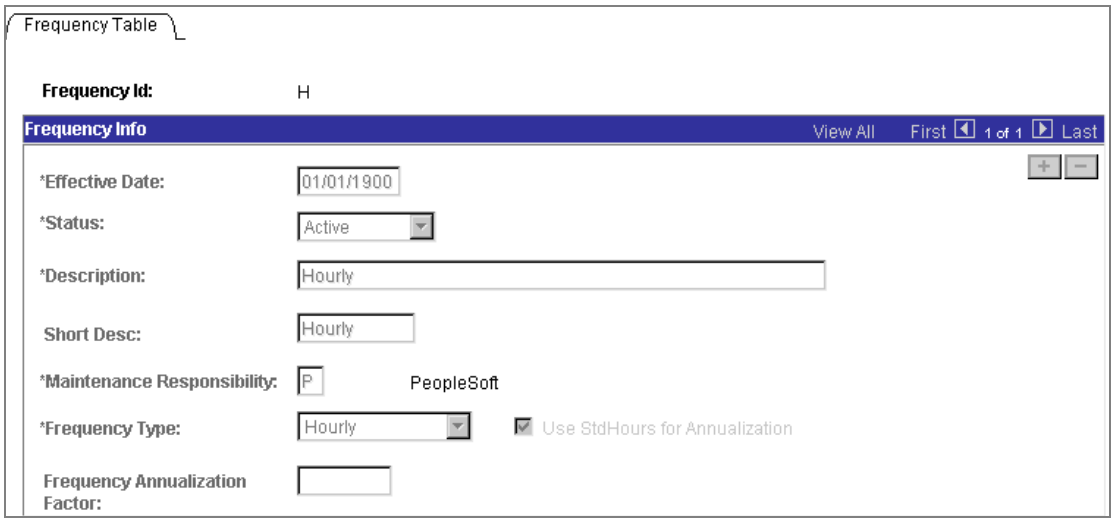
When you save changes to the Frequency Table, it publishes the Frequency Table enterprise integration point (EIP). After HR publishes the data, other products can subscribe to the it, keeping frequency codes synchronized across applications.

See Also

PeopleSoft Enterprise Integration PeopleBook

Defining a Frequency ID, Type, and Annualization Factor.

Access the Frequency Table page



Frequency Table page

Maintenance Responsibility Select a maintenance responsibility. Values are:

C (customer): You define the frequency ID. You are responsible for keeping this frequency code up to date.

P (PeopleSoft): PeopleSoft delivers the frequency in the system and is responsible for keeping it up to date. The other fields on this page become unavailable.

Frequency Type Select a frequency type. Values are:

A (annual)

B biweekly)

C (contract)

D (daily)

F (every four weeks)

	H (hourly): The **Use StdHours for Annualization** (use standard hours for annualization) check box becomes available. ***M*** (monthly) ***Q*** (quarterly) ***S*** (semimonthly) ***W*** (weekly)
Use StdHours for Annualization (use standard hours for annualization)	Select to have the system use job standard hours for annualization instead of the frequency annualization factor. The frequency annualization factor is set to 0, and that field becomes unavailable. **Note.** You can use only hourly frequencies that use standard hours for annualization for compensation and pay frequency in PeopleSoft Human Resources, PeopleSoft Payroll for North America, and PeopleSoft Global Payroll.
Frequency Annualization Factor	Defines how many frequency periods occur in one year. Examples: • A daily compensation frequency is 260 because there are 260 workdays in the year. • You can define a frequency called W53 with a W (weekly) frequency type and an annualization factor of 53.

Important! If you change the effective status, frequency type, or annualization factor of an existing frequency, you receive a warning message saying that previous calculations using this frequency aren't synchronous with the new values of the frequency.

Using Frequency

This section describes how to:

- Use frequency with compensation rates.
- Use frequency with payroll calculations.

Using Frequency With Compensation Rates

When you associate frequency with compensation rates, you define the time period on which the compensation is based. For example, you might state a worker's base salary as 60,000 a year (annual frequency) or 5,000 a month (monthly frequency). When you associate these compensation rates with jobs, positions, salary steps, or individual employee records, the

system uses the annualization factor that is associated with this frequency to convert the compensation to other frequencies.

When you set up PeopleSoft Human Resources, you can define default frequencies at several levels. You can usually change that default value when the system enters it into other pages.

Component	*Default Frequency Value*
Product Specific page of Installation component	Set a default compensation frequency and a default work period for your organization. The system enters these default values in the Job Code Table.
Job Code Profile page of Job Code component	Compensation frequency and default work period values are taken from the Installation Table.
Comp Rate Code Table	Specify rate code frequencies on the Comp Rate Code Table. The system enters these default values when you select a rate code in a pay components group box (found on a number of pages in PeopleSoft HRMS). You can also specify here whether the FTE (full-time equivalency) calculation should be applied to the compensation associated with the rate code.
Pay Group Table	Define pay group frequencies. The system uses the frequency information to calculate the daily and monthly rates that appear in the Pay Rates group box on the Compensation page of the Job Data component.

See Also

"Setting Up Your HRMS System," Entering Product- and Industry-Specific Installation Information

"Setting Up Jobs and Pay Groups," Adding New Job Codes

"Working With Multiple Components of Pay," Defining Rate Codes

"Setting Up Jobs and Pay Groups," Maintaining Pay Groups

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

Frequency ID	Description	Annualization Factor
F	Every four weeks	13
H	Hourly	2080
M	Monthly	12
Q	Quarterly	4
S	Semimonthly	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 of these applications use the Frequency Table page, enabling you to define your own compensation and pay frequencies, which you then use wherever earnings frequency conversions occur in 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 Generation Control Frequency table.

PeopleSoft Payroll for North America uses frequency to define compensation and pay frequencies, including the annualization and de-annualization of compensation rates.

See Also

PeopleSoft Global Payroll PeopleBook, "Defining Calculation Elements," Defining Generation Control Frequency

PeopleSoft Global Payroll

An *element* is the smallest component of PeopleSoft Global Payroll, and it is used in defining calculation rules to process your payroll. Elements can hold the values of pay (earnings), an amount to be deducted from pay (deduction), or time away from work (absence).

Elements (such as earnings, deduction, and absence) can be standalone. Supporting elements (such as rate codes or rounding rules) can be used with other elements to define a calculation rule. Each element is defined only once, but it can be used repeatedly.

For any earnings, deduction, or absence element, you must specify the frequency of the calculated result. For each item that you associate with a frequency, you must consider how the frequency fits into the overall processing picture. Selecting the correct frequency for earnings, deductions, and absence elements is essential for correct processing. For example:

Earnings element	In what frequency is the stated amount paid? Is it per hour, per week, per month, or per year?
Deduction element	In what frequency is the stated amount withheld? Is it withheld from each paycheck or only from the first paycheck in a month?
Absence element	Is an employee entitled to three days of holiday time per month or per year?

Using Frequency With Element Definitions

In PeopleSoft Global Payroll, you use frequency to define earnings, deduction, or absence elements.

To illustrate, we refer to defining an earnings element. However, the process is the same for earnings, deduction, and absence elements.

You define the calculation rule, frequency, and generation control for an earnings element on the Earnings Calculation page.

Select from the following types of calculation rules:

- Amount.
- Rate ∗ Unit.
- Rate ∗ Unit ∗ Percentage.
- Base ∗ Percentage.

Once you select a calculation rule, you must further define details for each component of the rule. For example, if you select Amount, specify the amount of the earnings element.

The following table lists the components of a calculation rule for which frequency conversion is performed:

Calculation Rule	*Component*
Amount	Amount (if necessary)
Rate ∗ Unit	Unit
Rate ∗ Unit ∗ Percentage	Unit
Base ∗ Percentage	Base

Define the frequency with which this earnings element is paid. If you select Use Calendar Frequency, the system uses the frequency that's defined for the calendar period on the Calendar Period page. If you select Use Specified Frequency, you can define your frequency directly on 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 that you select Use Specified Frequency, that you have a weekly payroll, and you create an earnings element with an amount of 100 and a frequency of Monthly. If you don't have any generation control conditions defined, the system annualizes and de-annualizes the amount into a processing frequency amount. Let's assume that you define your organization's monthly frequency as 12 and the weekly frequency as 52. The system takes the 100 (monthly amount) and annualizes it to 1200. Next, it takes this annualized amount and de-annualizes it into the payroll processing frequency (weekly, in this example). The amount paid each pay period is 1200 / 52 = 23.08.

The benefit of defining a frequency is that if your organization has multiple pay frequencies (such as weekly, semimonthly, and monthly), you don't have to create separate earnings for each frequency. The system automatically converts the amount into the corresponding pay period amount. Let's say that your organization decides to give an annual bonus of 1000 to all payees and this bonus is distributed throughout the year. Your hourly payees get paid weekly and your salaried payees get paid monthly. If you define an earnings bonus as BON = 1000, with a frequency of Annual, you can apply this earnings definition to payees who are paid weekly and payees who are paid monthly by using annualization and de-annualization. The frequency assigned on the Earnings Calculation page calculates the bonus amount correctly, regardless of the pay frequency.

Note. In PeopleSoft Global Payroll, there is no distinction between 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 PeopleSoft Global Payroll Generation Control Frequency 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 that are 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 uses an intermediary table called the Generation Control Frequency table to accommodate the frequencies 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 element to be paid only on the first pay period of the month. In PeopleSoft Human Resources, the frequency would be monthly. This might not work for your payroll purposes. So, in PeopleSoft Global Payroll, the earnings element would be defined (tagged) as *First of the Month* and paid only on the first pay period of the month.

The Generation Control Frequency 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 an earnings element is to be paid only to active payees, you can control the payroll so that this earnings type isn't paid to terminated payees:

- First you define generation control ID parameters on the Generation Control Conditions page.
- Next, when you define an earnings element, you prompt against this table by selecting a generation control name on the Earnings Calculation page.
- Then you don't have to redefine the parameters for each earnings element.

If you leave the Generation Control field blank on the Earnings Calculation page, the system assumes that an earnings element is to be paid every time that a payee's earnings are processed.

Note. If the frequency that you select is 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 is de-annualized to 100 per month (1200 / 12 = 100). If you have a generation control frequency for this earnings element, the amount is different. Let's say that you have defined a generation control frequency of quarterly. The earnings are de-annualized to 300 (1200 / 4 = 300).

PeopleSoft Global Payroll delivers four predefined generation control frequencies: First Month, Annual, January, and Quarter. All 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 the time period to calculate. This is often referred to as the pay period. You define period selection criteria by defining a period ID on the Calendar Period page.

The period ID defines the start date, end date, and frequency of a particular pay period. This definition is kept separate from the pay calendar to make it easy to reuse and to provide optimum flexibility during processing.

Here are some examples of the time and frequency data that can be defined by a period ID:

Begin Date	*End Date*	*Frequency*
June 1	June 7	Weekly

Begin Date	End Date	Frequency
June 1	June 30	Monthly
June 1	June 15	Semimonthly
June 1	August 31	Quarterly

On the Calendar Period page, the frequency is defined for de-annualization when an earnings, deduction, or absence element is defined without generation control frequency. However, if generation control frequency is included (in the earnings, deduction, or absence element definition), and the element generation control and the calendar ID generation control match, the system uses this generation control frequency for the de-annualization factor.

Examples of Frequencies

Frequency	Element 1	Element 2a	Element 2b	Element 3
Amount	1,200	1,200	1,200	1,200
Frequency (Element Definition)	Monthly (12)	Monthly (12)	Monthly (12)	Monthly (12)
Generation Control Frequency	None	Monthly (12)	Monthly (12)	Semimonthly (24)
Pay Period Frequency	Semimonthly (24)	Semimonthly (24)	Semimonthly (24)	Semimonthly (24) *
Calendar Generation Control Frequency	None	Monthly (12)	None	Semimonthly (24) *
Calculated Amount	600	1200	Not resolved	600

You don't need to specify the associated frequency if it coincides with the pay period frequency.

Using Frequency With Rate Codes and System Elements

When you define an earnings or deduction element that uses either a rate code or a frequency-controlled system element, the earnings or deduction element should always have the frequency Use Calendar Period Frequency. System elements are delivered and maintained by PeopleSoft.

A system element that is frequency-controlled resolves in the calendar frequency portion of payroll processing, according to the frequency that is specified for the element when it is set up. The system then de-annualizes by the calendar frequency.

PeopleSoft Payroll for North America

PeopleSoft Payroll for North America uses the Frequency Table page to define compensation and pay frequencies, which you use wherever earnings frequency conversions occur within the system. The values defined on the Frequency Table are available anywhere in PeopleSoft Payroll for North America where compensation and pay frequency fields exist. All

compensation and pay frequency fields display frequency ID values in the Frequency ID field in the Frequency Table record.

Two fields—Comp Frequency (compensation frequency) and Pay Frequency—that are used in 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 the annualization and de-annualization of compensation during 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 that is 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's 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 in 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 = (Comprate ∗ Compensation Frequency Factor)

12,000.00 = (1,000.00 ∗ 12)

- Biweekly Rate = (Comprate ∗ Compensation Frequency Factor) / Pay Frequency Factor

459.77 = (1,000.00 ∗ 12) / 26.1

Synchronizing PeopleSoft Human Resources and Payroll for North America Processes

PeopleSoft Human Resources must obtain annualization factors from a consistent location so that PeopleSoft Human Resources and Payroll for North America calculate the same hourly, monthly, and annual rates consistently, regardless of where 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: You define those fields by selecting the pay frequency that matches the name of the field. Valid values are automatically populated 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 that 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).

Example

Assume that the Job, Pay Group, and Frequency Table records contain the information in the examples that follow. These examples illustrate how the system obtains the rates during online and batch processing.

Job Record

Employee	*Comprate*	*Comp. Frequency*	*Standard Hours*	*Pay Group*	*Standard Weeks*
John	100.00	W	40.00	PAY1	W
Jane	10.00	H	40.00	PAY2	W

Pay Group Record

ID	*Pay Frequency*	*Daily Frequency*	*Monthly Frequency*
PAY1	B	D	M
PAY2	W	D	M

Frequency Record

ID	*Frequency Type*	*Frequency Factor*
H	H	2,080.00
W	W	52.00
B	B	26.00
D	D	260.00
M	M	12.00

Employee John

Hourly Rate	= (Comprate ∗ Compensation Frequency) / (Standard Hours ∗ Standard Weeks Frequency)
2.50	= (100.00 ∗ 52.00) / (40.00 ∗ 52.00)
Daily Rate	= (Comprate ∗ Compensation Frequency) / Daily Frequency

20.00	= (100.00 * 52.00) / 260.00
Monthly Rate	= (Comprate * Compensation Frequency) / Monthly Frequency
433.00	= (100.00 * 52.00) / 12.00
Annual Rate	= (Comprate * Compensation Frequency)
5,200.00	= (100.00 * 52.00)

Employee Jane

Hourly Rate	= Comprate
10.00	= 10.00
Daily Rate	= (Comprate * Standard Hours * Standard Weeks Frequency) / Daily Frequency
80.00	= (10.00 * 40.00 * 52.00) / 260.00
Monthly Rate	= (Comprate * Standard Hours * Standard Weeks Frequency) / Monthly Frequency
1,733.33	= (10.00 * 40.00 * 52.00) / 12.00
Annual Rate	= (Comp Rate * Standard Hours * Standard Weeks Frequency)
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.

Note. For more information about how frequencies are handled by the PeopleSoft Payroll for North America system, see your PeopleSoft Payroll for North America documentation.

Understanding Frequency Calculations for Conversions

This section describes how to:

- Apply factors to the compensation rate.
- Calculate the compensation rate frequency for conversion.
- Calculate the job rate frequency for conversion.

Applying Factors to the Compensation Rate

PeopleSoft HRMS calculates and displays compensation rates in the hourly, daily, weekly, monthly, and other frequencies using two standard frequency conversion formulas. Depending on the frequency being converted, the system performs the calculations by applying the following factors to the compensation rate:

- Frequency annualization.
- Job standard hours.
- Annualization of the standard work period.
- FTE (full-time equivalency).

Defining the Frequency Annualization Factor

The system provides several standard frequencies. Each frequency ID has an associated annualization factor that represents the number of times that 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 define your own frequencies and their associated annualization factors on the Frequency Table page. 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 *W* (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 define 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:

- Job Information page of the Hire component: Define values for an employee.
- Job Code Profile page of the Job Code component: Define values for a job code.
- Basic Eligibility page of the Job Requisition Data component: Define values for an employment application.
- Salary Plan Table page: Define values for a salary plan.
- Job Information page of the Position Data component: Define values for a position.
- Settings page of the Primary Permission List Preferences component: Define values as defaults for a primary permission list.
- Products page of the Installation component: Define values as defaults for a company.

- HR Defaults page of the Business Unit HR Defaults component: Define values as defaults for PeopleSoft Human Resources.

Defaults for Standard Hours and Standard Work Period

The system inserts the standard hours and the standard work period as default information only if both are defined. The following list describes the source of defaults in the Job record under the specified conditions:

- Job Code Profile page of the Job Code component, if you assigned the worker a job code.
- Salary Plan Table page, if you assigned the worker to a position.
- Settings page of the Primary Permission List Preferences component for the user ID.
- Products page of the Installation component (if you didn't indicate standard hours on the Job Code Table), Salary Plan Table, or Primary Permission List Preferences Table.

Defining Full-Time Equivalency

Full-time equivalency (FTE) is the percentage of full time that an employee should normally work in a job. In calculating the FTE, the system uses your definition of the standard hours and the standard work period.

If you select Apply FTE for a compensation component, PeopleSoft Human Resources uses the standard hours and the standard work period to compute FTE to prorate holiday hours and pay for part-time and hourly employees.

(FRA) Note. 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 ∗ Annualization Factor of Job Standard Work Period) / (Default "full-time" Standard Hours ∗ 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).

Calculating the Compensation Rate Frequency for Conversion

The system converts compensation rates to daily, monthly, and other frequencies in the system using standard formulas. The formula for converting to or from an hourly rate takes the standard hours and standard work period into account.

The system performs compensation rate conversions as follows:

1. Finds an annual rate (or annualizes the rate) for an employee's compensation, using the annualization calculations in this section.
2. Divides the annual rate using de-annualization conversion calculations to calculate the desired frequency.
3. Multiplies the converted compensation rate by the FTE factor, if Apply FTE is selected for the pay component.

(FRA) Note. For employees in French regulatory regions, the system uses the PAID_FTE field 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 ∗ Job Standard Hours ∗ Frequency Annualization Factor of Standard Work Period
Monthly, daily, and other conversions	Annual Rate = Comprate ∗ 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 ∗ Frequency Annualization Factor of Standard Work Period)
Monthly, daily, and other conversions	Non-Annual Rate = Comprate / Frequency Annualization Factor

The following examples illustrate the use of these formulas.

Example of Hourly to Monthly Compensation Rate Conversion

Teresa Johnson has the following 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 FTE (full-time equivalency) compensation rate. The total represents Teresa's monthly salary based on a 35-hour workweek over a 52-week year.

Rate	*Equation*
Annual	Annual rate = Comprate ∗ Job Standard Hours ∗ Frequency Annualization Factor of the Standard Work Period 10 ∗ 35 ∗ 52 = 18,200
Monthly	Annualized Comprate / Frequency Annualization Factor of Month 18,200 / 12 = 1516.67

Example of Monthly to Biweekly Compensation Rate Conversion

Bill McKenny has the following employment information:

Employment Variables	*Value*
Comprate (monthly)	2000
Frequency Annualization Factor of Monthly	12
Frequency Annualization Factor of Biweekly	26
Apply FTE Selected	Yes
FTE Factor	0.95

The following table shows how the system calculates Bill McKenny's biweekly compensation rate:

Rate	*Equation*
Annual	Comprate ∗ Frequency Annualization Factor of Month 2000 ∗ 12 = 24,000
De-annualize	Annualized Comprate / Frequency Annualization Factor of Biweekly 24,000 / 26 = 923.08
Multiply by FTE	923.08 ∗ 0.95 = 876.85

Calculating the Job Rate Frequency for Conversion

The system displays the following job compensation rates on the Compensation page of the Job Data component: annual, monthly, daily, and hourly. These rates show the employee's compensation in frequencies other than the compensation rates that are calculated using the standard frequency conversions. 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, they are not 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 as the pay frequency.

The system finds the frequencies that are associated with the employee's pay group on the Pay Group table of PeopleSoft Payroll for North America or PeopleSoft Global Payroll, depending on the employee's pay system flag. The system uses the formulas described below 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 who is compensated using a monthly or yearly salary.

Rate	*Equation*
Annual	(Comprate ∗ Annualization Factor of Compensation Frequency)
Monthly	(Comprate ∗ Annualization Factor of Compensation Frequency) / Annualization Factor of Monthly Rate Frequency From Pay Group table)
Daily	(Comprate ∗ Annualization Factor of Compensation Frequency) / (Annualization Factor of Daily Rate Frequency From Pay Group table)
Hourly	(Comprate ∗ Annualization Factor of Compensation Frequency) / (Job Standard Hours ∗ 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 Compensation 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

Employment Variables	*Values*
Annualization Factor of Job Standard Work Period	53

The following table shows how the system calculates Mary Jackson's job rates:

Rate	*Equation*
Annual	(Comprate ∗ Annualization Factor of Compensation Frequency) 3000 ∗ 12 - 36000
Monthly	(Comprate ∗ Annualization Factor of Compensation Frequency) / Annualization Factor of Monthly Rate Frequency From Pay Group Table) (3000 ∗ 12) / 12 = 3000
Daily	(Comprate ∗ Annualization Factor of Compensation Frequency) / (Annualization Factor of Daily Rate Frequency From Pay Group Table) (3000 ∗ 12) / 260 = 138.46
Hourly	(Comprate ∗ Annualization Factor of Compensation Frequency) / (Job Standard Hours ∗ Annualization Factor of Job Standard Work Period) (3000 ∗ 12) / (35 ∗ 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, as shown in the following table:

Rate	*Equation*
Annual	(Comprate ∗ Job Standard Hours ∗ Annualization Factor of Job Standard Work Period)
Monthly	(Comprate ∗ Job Standard Hours ∗ Annualization Factor of Job Standard Work Period) / (Annualization Factor of Monthly Rate Frequency From Pay Group Table)
Daily	(Comprate ∗ Job Standard Hours ∗ Annualization Factor of Job Standard Work Period) / (Annualization Factor of Daily Rate Frequency From Pay Group Table)
Hourly	(Comprate ∗ Job Standard Hours ∗ Annualization Factor of Job Standard Work Period) / (Job Standard Hours ∗ 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 (Weekly)	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	(Comprate * Job Standard Hours * Annualization Factor of Job Standard Work Period) 10 * 40 * 52 = 20800
Monthly	(Comprate * Job Standard Hours * Annualization Factor of Job Standard Work Period) / (Annualization Factor of Monthly Rate Frequency From Pay Group Table) (10 * 40 * 52) / 12 = 1733.33
Daily	(Comprate * Job Standard Hours * Annualization Factor of Job Standard Work Period) / (Annualization Factor of Daily Rate Frequency From Pay Group Table) (10 * 40 * 52) / 260 = 80.00
Hourly	(Comprate * Job Standard Hours * Annualization Factor of Job Standard Work Period) / (Job Standard Hours * Annualization Factor of Job Standard Work Period) (10 * 40 * 52) / (40 * 52) = 10

CHAPTER 8

Setting Up Local Country Functionality

This chapter includes an overview of local country functionality setup and tells you how to:

- Set up French control tables.
- Set up the German control table.
- Set up Japanese control tables.
- Load Dutch postal codes.
- Set up Spanish control tables.

Understanding Local Country Functionality Setup

If you're administering a local or multinational workforce, you must set up some tables that are referenced in the core control tables to support local country requirements. Do this before you set up core control tables, such as for pay groups, or define companies, locations, departments, and job codes.

(FRA) Setting Up French Control Tables

This section describes how to:

- Understand enterprise integration points.
- Maintain APE codes.
- Maintain INSEE codes.
- Enter salary and Social Security ceiling information.
- Enter the institution type and describe pension companies.
- Enter the insurance company address.
- Set up URSSAF codes.

Pages Used to Set Up French Control Tables

Page Name	Object Name	Navigation	Usage
APE Table	APE_INDSTRY_CD_FRA	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, FRA APE Table, APE Table Monitor Workplace, Report Regulations (FRA), Setup, APE Table, APE Table	Maintain APE codes for your French organization.
Insee Table Fra	INSEE_TABLE_FRA	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	Maintain INSEE codes for your French organization.
Detail	INSEE_DSCRLONG_SEC	Select the Details link on the Insee Table Fra page.	Record additional information or comments about an INSEE code.
External Variables	EXT_PARM_CD_FRA	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	Enter information that is related to the salaries and Social Security ceilings that are established by the French government each year.

Page Name	*Object Name*	*Navigation*	*Usage*
Institution Type (France pension/contribution funds table – institution type)	PENS_FUNDS_FRA	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	Enter the institution type and describe the pension companies to which your employees make their pension contributions.
Institution Add. (France pension/contribution funds – institution address)	PENSION_FUND_FRA	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	Enter the insurance company's address information and describe the insurance company to which your employees make pension contributions.
URSSAF Table	URSSAF_TABLE_FRA	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, FRA URSSAF Table, URSSAF Table Monitor Workplace, Report Regulations (FRA), Setup, URSSAF Table, URSSAF Table	Set up URSSAF codes.

Understanding Enterprise Integration Points

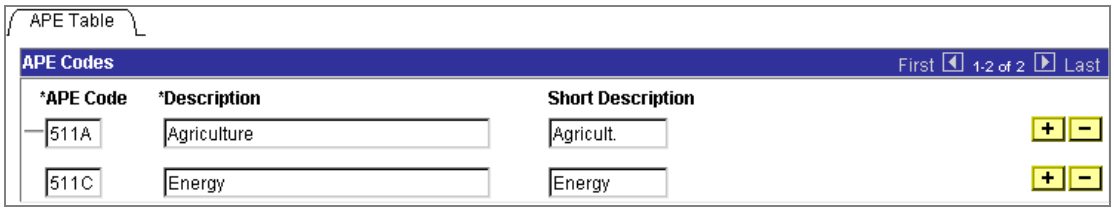
When you save changes to the Industry Inspection Table, it publishes the APE Industry Codes Table–France enterprise integration point (EIP). After HR publishes the data, other products can subscribe to it, keeping APE codes synchronized across applications.

See Also

PeopleSoft Enterprise Integration PeopleBook

Maintaining APE Codes

Access the APE Table page.

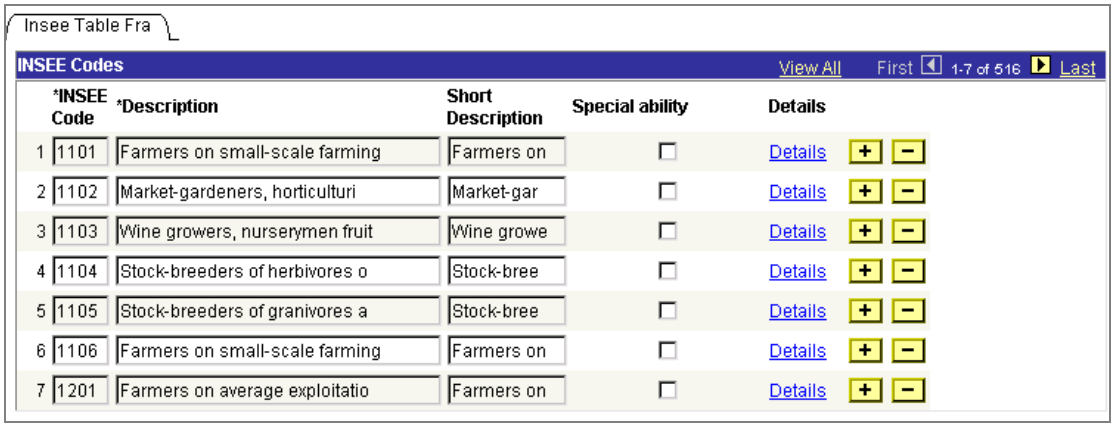


APE Table page

APE codes are used to classify the type of industry (such as software, banking, and insurance) that a company represents. APE codes are a normalized set of codes that are required by law and are used on Training Report 2483 (TRN029).

Maintaining INSEE Codes

Access the Insee Table Fra page.



Insee Table Fra page

The system displays the description that you enter for this code on pages or reports in PeopleSoft Human Resources that reference the INSEE code.

These values are set by the INSEE and classify job codes. Link INSEE codes to all defined job codes that are used in French organizations.

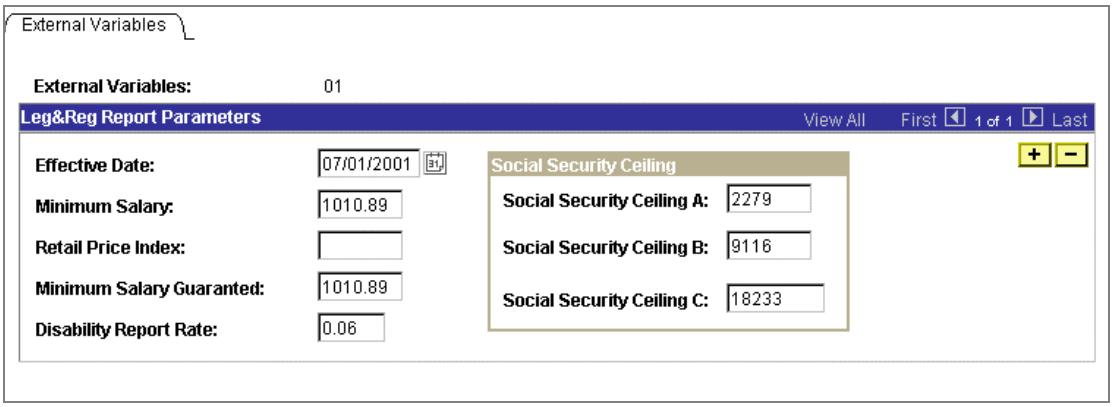
Special ability Select if this INSEE code represents a job that requires a special ability.

An 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 to record additional information or comments concerning this INSEE code on the Detail page.

Entering Salary and Social Security Ceiling Information

Access the External Variables page.



External Variables page

The values that you enter act as a reference for salary and payroll processing in PeopleSoft Human Resources.

Leg&Reg Report Parameters (legislative and regulatory report parameters)

Minimum Salary, Retail Price Index, and **Minimum Salary Guaranteed** — Enter a minimum salary, retail price index, and guaranteed minimum salary for this external variable. The French government sets the amounts.

Disability Report Rate — Prior to launching the Disability report (DIS001), enter a disability report rate. The rate is set by the French government, and the current rate is 6 percent (a field value of ***0,06***). The disability report rate is set up in the External Variables Table.

Social Security Ceiling

These ceiling values are determined every year by the French Social Security Administration; the values that you enter are the ceiling values that define different income brackets for French workers. They are also used as a reference for payroll calculations for French employees because many types of Social Security contributions are calculated based on the Social Security income bracket into which an employee's salary falls.

For example, if you enter the following Social Security ceilings for **Social Security Ceiling A, B,** and **C,** and the tax rates for each bracket of income are as shown:

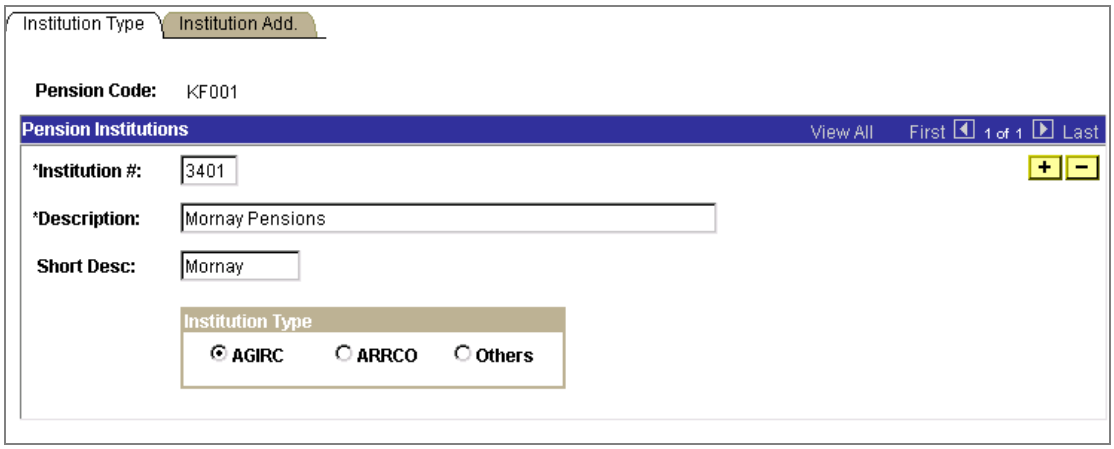
	Bracket A	*Bracket B*	*Bracket C*	*Above*
Ceiling	2279 EUR	9116 EUR	18233 EUR	
Tax Rate	10%	15%	18%	20%

Then an employee whose salary is 31000 EUR per month, based on this Social Security and tax rate scenario, is required to pay the following Social Security premium:

2279 * 10% + 9116 * 15% + 18233 * 18% + 1372 * 20%

Entering the Institution Type and Describing Pension Companies

Access the Institution Type page.



Institution Type page

Institution Type Only one institution of each type is used in PeopleSoft Global Payroll. This field indicates which class of employee an institution is for. Values are:

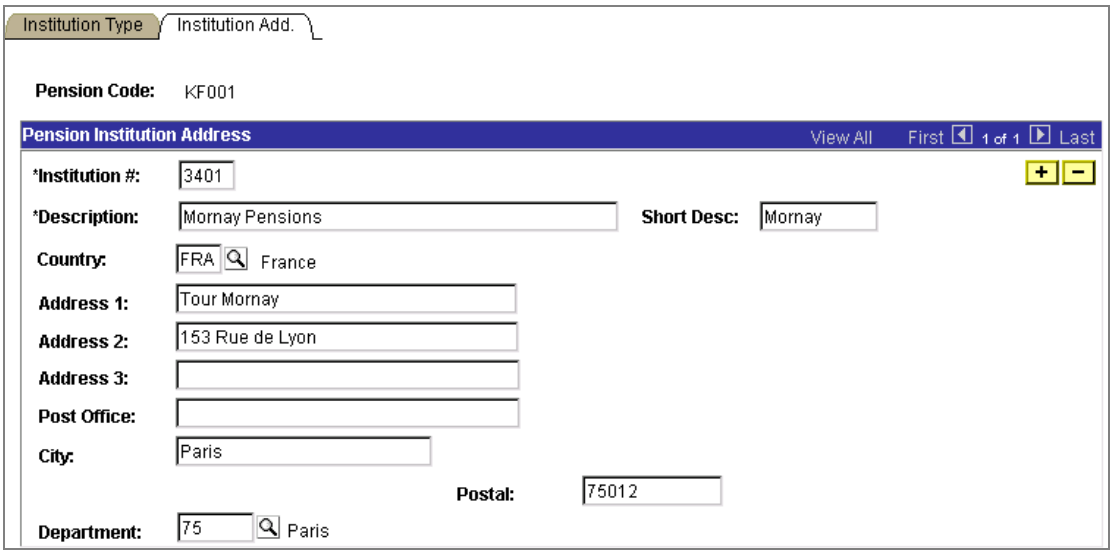
AGIRC: Pension funds for managers (cadres).

ARRCO: Pension funds for non-managers (non-cadres).

Others: Contingency funds.

Entering the Insurance Company Address

Access the Institution Add. Page.

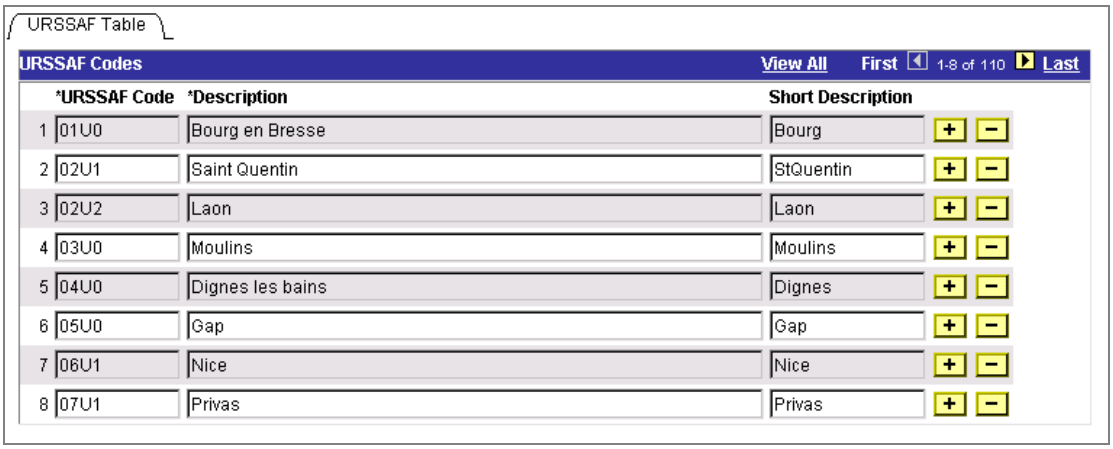


Institution Add. page

Note. This information doesn't roll into PeopleSoft Pension Administration, which is a U.S. application.

Setting Up URSSAF Codes

Access the URSSAF Table page.



URSSAF Table page

URSSAF Code 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.

(GER) Setting Up the German Control Table

You must set up information in the German control table to track German industrial inspection codes.

Page Used to Set Up German Industrial Inspection Codes

Page Name	*Object Name*	*Navigation*	*Usage*
Industrial Inspection	INDUST_INSP_GER	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, GER Industrial Inspection, Industrial Inspection	Set up German industrial inspection codes that you associate with locations in your organization.

Understanding Enterprise Integration Points

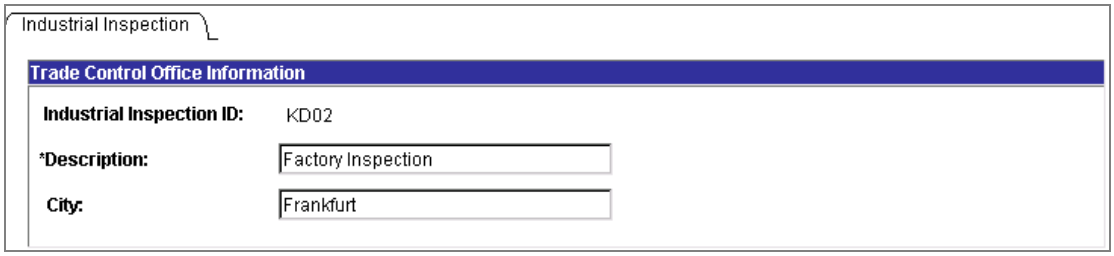
When you save changes to the Industry Inspection Table, it publishes the Industry Inspection Table–Germany enterprise integration point (EIP). After HR publishes the data, other products can subscribe to it, keeping industry inspection information synchronized across applications.

See Also

PeopleSoft Enterprise Integration PeopleBook

Setting Up German Industrial Inspection Codes

Access the Industrial Inspection page.



Industrial Inspection page

Industrial inspection codes aren't effective-dated and have no status.

City Specify the city that is associated with this industrial inspection code according to the German *Berufsgenossenschaft.*

(JPN) Setting Up Japanese Control Tables

This section describes how to:

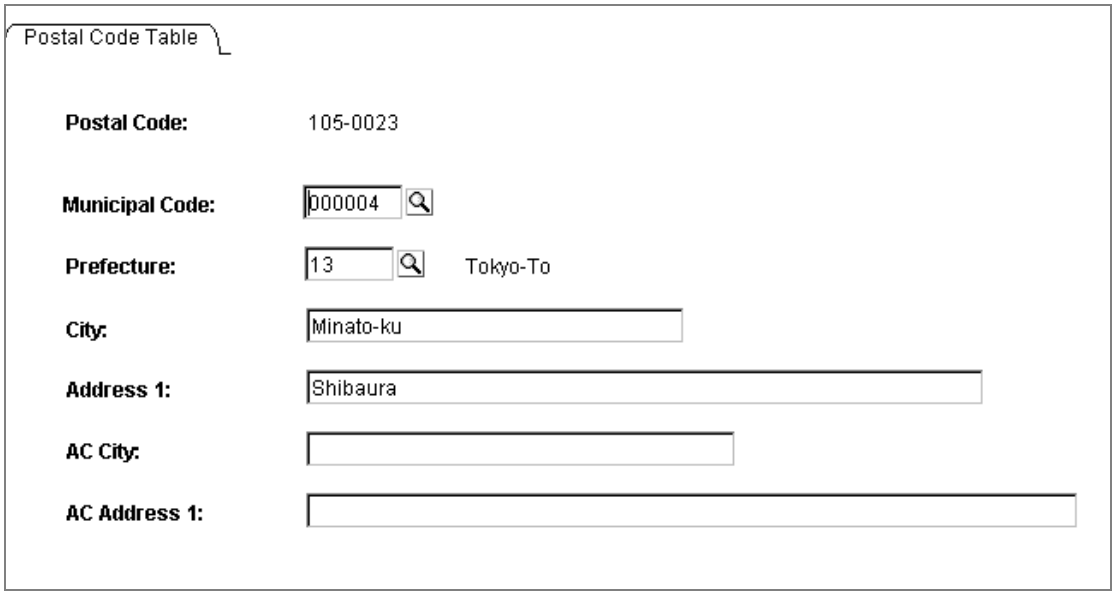
- Set up the Postal Code Table.
- Set up education level ages.
- Set up the Education Level Age Table.
- Establish Japanese salary component settings.

Pages Used to Set Up Japanese Control Tables

Page Name	*Object Name*	*Navigation*	*Usage*
Postal Code Table	POSTAL_TBL_JPN	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, JPN Postal Code Table	Enter information for Japanese postal codes.
JPN Education Level Age Tbl (Japan education level age table)	EDLVLAG_TBL_JPN	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, JPN Education Level Age Table Define Business Rules, Define General Options, Setup Lcl, JPN Education Level Age Table	Set up your company's education level age bases.
JPN Salary Components Settings	SETUP_SALCOMP_JPN	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, JPN Salary Components Settings Define Business Rules, Manage Human Resources (GBL), Setup Lcl, JPN Salary Components Settings	Establish your organization's standard calculation birthday and specify whether you want to use a grade range check for certain salary components.

Setting Up the Postal Code Table

Access the Postal Code Table page.



Postal Code Table page

Municipal Code Enter the code for the Japanese municipality that this postal code belongs to.

Prefecture Select the prefecture for this postal code from the list.

Setting Up Education Level Ages

The Education Level Age Table enables you to link highest education levels—already in the system—to what we call the Education Level Age Basis (as of hire). The system uses the Education Level Age Basis in the calculation of an employee's Education Level - Adjusted Birth Date, which is in turn used in the calculation of an employee's Education Level Age at any point in time. The system uses an employee's Education Level Age in education level age-related pay calculations. Education level age-related pay is a form of seniority pay.

Calculating an Employee's Education Level Age

This section describes how the system uses the Education Level Age Basis in the eventual determination of an employee's education age-related pay. This section uses many acronyms, so here's a quick reference:

Acronym	*Meaning*
ELABa	Education Level Age Basis (as of Hire)
AELABa	Adjusted Education Level Age Basis (as of Hire)
ELABi	Education Level - Adjusted Birth Date
SCB	Standard Calculation Birthday
CSD	Company Seniority Date
ELA	Education Level Age

Company A has set the Education Level Age Basis (ELABa) for four years of college at 22. The company also set the Standard Calculation Birthday (SCB)—the anniversary for incrementing years of service—to April 1.

Hiroshi was born on February 6, 1972 and graduated after four years of college on March 23, 1994 at age 22. He then spent two years travelling around the world. Company A hired him on June 1, 1996. He is not hired on April 1 because he didn't get back from his travels until May 1996. At the time he is hired, he is 24 years old.

For the purpose of calculating Hiroshi's education age-related pay, each year the system needs to calculate Hiroshi's Education Level Age. It will use his Education Level - Adjusted Birth Date to do this.

In calculating an employee's ELABi, the system uses the ELABa, the Company Seniority Date (CSD), and the company's SCB.

The relationship between the employee's CSD and the company's SCB may result in an adjustment to the employee's ELABa, called the Adjusted Education Level Age Basis or AELABa. If the month/day of an employee's hire date (as determined by the CSD field) is after the company's SCB (that is, CSD is greater than SCB), the employee's ELABa is decreased by 1.

In Hiroshi's case, because his June 1 month/day hire date (also his CSD) falls after the company's April 1 SCB, his ELABa is decreased by 1. If he had been hired on or before April 1, there would be no adjustment to his ELABa.

This is how we get Hiroshi's AELABa:

```
Since CSD month/day (Jun 1) > SCB month/day (Apr 1), adjustment = -1
```

Using this -1 we get:

```
ELABa – 1 = AELABa.
```

Which in Hiroshi's case is:

```
22 – 1 = 21
```

The system now uses the AELABa (21) to determine Hiroshi's ELABi year.

This formula is:

```
Year of Hire - AELABa = ELABi (year) or

1996 – 21 = 1975
```

So for education age-related pay calculations, Hiroshi's ELABi is April 1, 1975, the combination of the company's SCB month/day and Hiroshi's ELABi year (remember, he was born February 6, 1972).

Now we can look at how important that ELABi is.

One year later, 1997, the system needs to know Hiroshi's ELA. This is the calculation:

```
SCB (including Year of Calculation) - ELABi = ELA or
```

```
April 1 1997 – April 1 1975 = 22
```

This is the same ELA as a graduate who started with the company immediately after college. This set of calculations has, then, effectively adjusted Hiroshi's ELA, upon which education age-related pay is based, to take into account the two years that he spent traveling and the fact that he started work after the company's SCB.

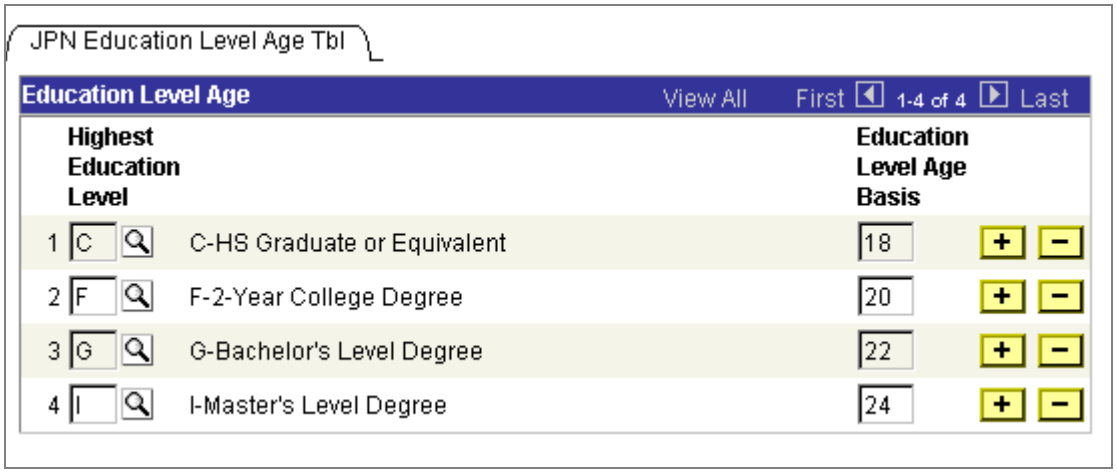
Note. If your company considers that the lapse of two months from April to June is not significant, you can adjust Hiroshi's ELABi from April 1, 1975 to April 1, 1974. Then, for the same 1997 calculation, Hiroshi's ELA is 23 (April 1, 1997 to April 1, 1974), the same as a new graduate who has worked for one year.

See Also

"Working With Multiple Components of Pay," Administering Seniority Pay

Setting Up the Education Level Age Table

Access the JPN Education Level Age Tbl page.



JPN Education Level Age Tbl page

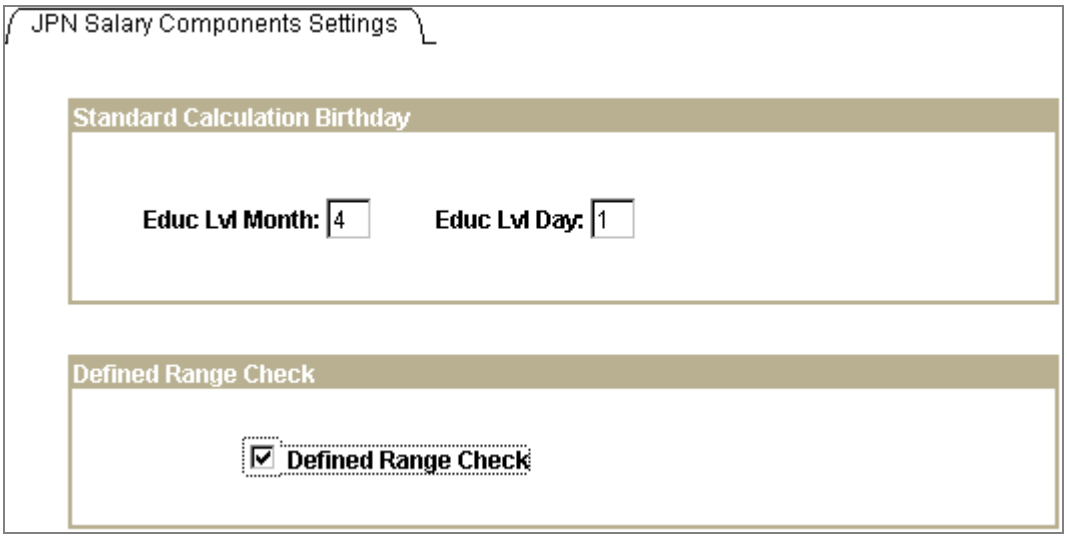
The system uses these age bases in the calculation of an employee's Education Level-Adjusted Birth Date, which is, in turn, used in the calculation of the employee's Education Level Age and education level age-related pay.

Education Level Age Basis This is the value you associate with the **Highest Education Level** that you selected in the first field. The system uses this in calculating an employee's Education Level-Adjusted Birth Date, which is used in the calculation of an employee's education level age.

Note. The **Highest Education Level** values are translate values from the Highest Education Level Table. You access the table to put employees' highest education levels on their Personal Profile pages in Personal Data. If you change any of these translate values (inactivate them, for example), you will need to change any employee records that were using the value to use another value. If you add a translate value and you want to associate an education level age basis with it, you must also add it to this page and allocate an **Education Level Age Basis** to keep it synchronized with the Highest Education Level table. If you don't add it, and you use the new **Highest Education Level** value—in Personal Data, Personal Profile, for example—the system will not be able to calculate the employee's Education Level - Adjusted Birth Date (it will remain blank). Consequently, the system will not be able to calculate the employee's Education Level Age.

Establishing Japanese Salary Component Settings

Access the JPN Salary Components Settings page.



JPN Salary Components Settings page

Standard Calculation Birthday

This is the single date, or anniversary, on which your employees' education level ages increment by one.

Educ Lvl Month (education level month) Enter the month, where January = 1, February = 2 and so on. This sets the month of your organization's Standard Calculation Birthday, the date on which all employees' company years of seniority increment by one year. It is used in the calculation of each employee's Education Level Age.

Educ Lvl Day (education level day)	This is the day of the month of the Standard Calculation Birthday. For example, **Month** 4, **Day** 1 sets the Standard Calculation Birthday as April 1.
Defined Range Check	Select to ensure the system checks that any component added to a Job Data - Compensation record with a compensation rate code of class *Defined Rate of Pay* (DFRPAY) is within the range that you have defined for that grade on the Salary Grade Table. The check applies to both a manually added component and an automatically added component. Selecting this check box also ensures that only one compensation rate code of the class DFRPAY can be entered on an employee Compensation record.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

(NLD) Loading Dutch Postal Codes

This section describes how to import postal codes into the Postal Code Table.

Page Used to Load Postal Codes

Page Name	*Object Name*	*Navigation*	*Usage*
Load Postal Code Table	RUNCTL_POSTAL_NLD	Define Business Rules, Manage Human Resources (GBL), Proc Lcl, NLD Load Postal Code Tbl, Load Postal Code Table	Import postal codes into the NLD Postal Code Table in your human resources system.

Importing Postal Codes Into the Postal Code Table

Access the Load Postal Code Table page.



Load Postal Code Table page

The Dutch postal authority provides a ZIP code table to which customers can subscribe. The 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.

Report Request Parameters

Initial Postal Code Loadfile Enter the initial ZIP code load file, including the path information, if you're adding Dutch postal code data to your system for the first time.

Update Postal Code File Enter the updated ZIP code file, including the path information, if you're doing a periodic update of the Dutch Postal Code Table.

Run Click to run this request. PeopleSoft Process Scheduler runs the NLD Load Postal Code Table process at user-defined intervals.

See Also

PeopleTools PeopleBook: Process Scheduler

(ESP) Setting Up Spanish Control Tables

If you do business in Spain, enter the information that is required by the Spanish government concerning your organization's primary industry activity and the insurance company that you use for workplace accidents or illnesses.

The Spanish government also requires every Spanish worker to belong to a Social Security Work Center. Employers use the work center number information to report employee information to the Spanish Social Security National Institute *(Instituto Nacional de la Seguridad Social)*.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables

Pages Used to Set Up Spanish Control Tables

Page Name	*Object Name*	*Navigation*	*Usage*
Insurance Company	INSUR_COMP_CD_ESP	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, ESP Insurance Company Tbl, Insurance Company	Enter information about your organization's insurance company.
Industry Activity	INDSTRY_ACT_CD_ESP	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, ESP Industry Activity Tbl, Industry Activity	Define the codes that are needed by your organization.

See Also

"Regulating PeopleSoft HRMS System Data"

CHAPTER 9

Setting Up Companies, Agencies, and Locations

This chapter discusses how to:

- Understand enterprise integration points.
- Define legal types.
- Enter company information.
- (USF) Enter agency information.
- Establish locations.
- (USF) Establish federal locations.
- Maintain departments.
- (USF) Set up federal departments.
- Define establishments.

Understanding Enterprise Integration Points

When you save changes to the Company Table, Location Table, and Department Table, they each publish an enterprise integration point (EIP) (the Company Table EIP, Location Table EIP, and Department Table EIP). After HR publishes the data, other products can subscribe to it, keeping company codes, location codes, and department IDs synchronized across applications.

See Also

PeopleSoft Enterprise Integration PeopleBook

Defining Legal Types

Many countries require that you report on your organization's legal structure, whether it's a corporation, a public limited company, a cooperative, or another type of organization.

You can associate the correct legal type with each company on the Company Table and use the information when you generate reports.

Page Used to Define Legal Types

Page Name	*Object Name*	*Navigation*	*Usage*
Legal Type	LEGAL_TYPE_TBL	Define Business Rules, Manage Human Resources (GBL), Setup, Legal Type, Legal Type	Define the types of legal entities that your organization includes.

Entering Company Information

You use the Company Table to enter information about a single company or multiple companies in your organization, from the corporate address to general ledger accounts, tax information, and payroll processing information.

If you use only PeopleSoft Human Resources, you enter information only on the first page (Company Location) for each company that you want to add. You can also associate a default pay group with the company on the Default Settings page. The value you select appears as the default on the Job Data pages for employees in this company. However, you'll probably find it easiest to treat each company that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

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 that you sponsor. Once you set up your retiree companies, you can match companies to pension plans in the Plan Administration component.

If you're using PeopleSoft Global Payroll, you must enter additional, payroll-specific company information on the Pay Entity page, if your pay entity is the same as the company. You do this in PeopleSoft Global Payroll.

This remainder of this section describes how to:

- Define and describe companies.
- Set up default information for companies.
- (BEL) Enter the default information and salary factors that are used for Claeys formula calculations.
- (BEL) Associate a provider with a setID.
- (USA) Set up tip allocation.

- Enter telephone information for a company.

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.

If your company uses PeopleSoft Payroll for North America, each company that you add must be equivalent to each EIN that you use. To add a company EIN, your payroll staff needs to complete all three pages at least once.

See Also

PeopleSoft Pension Administration PeopleBook, "Establishing Plan Administration Information," Entering Funding Provider and Company Information

PeopleSoft Global Payroll PeopleBook, "Understanding the Organizational Structure," Defining Pay Entities

PeopleSoft Payroll for North America PeopleBook

PeopleSoft Payroll Interface PeopleBook

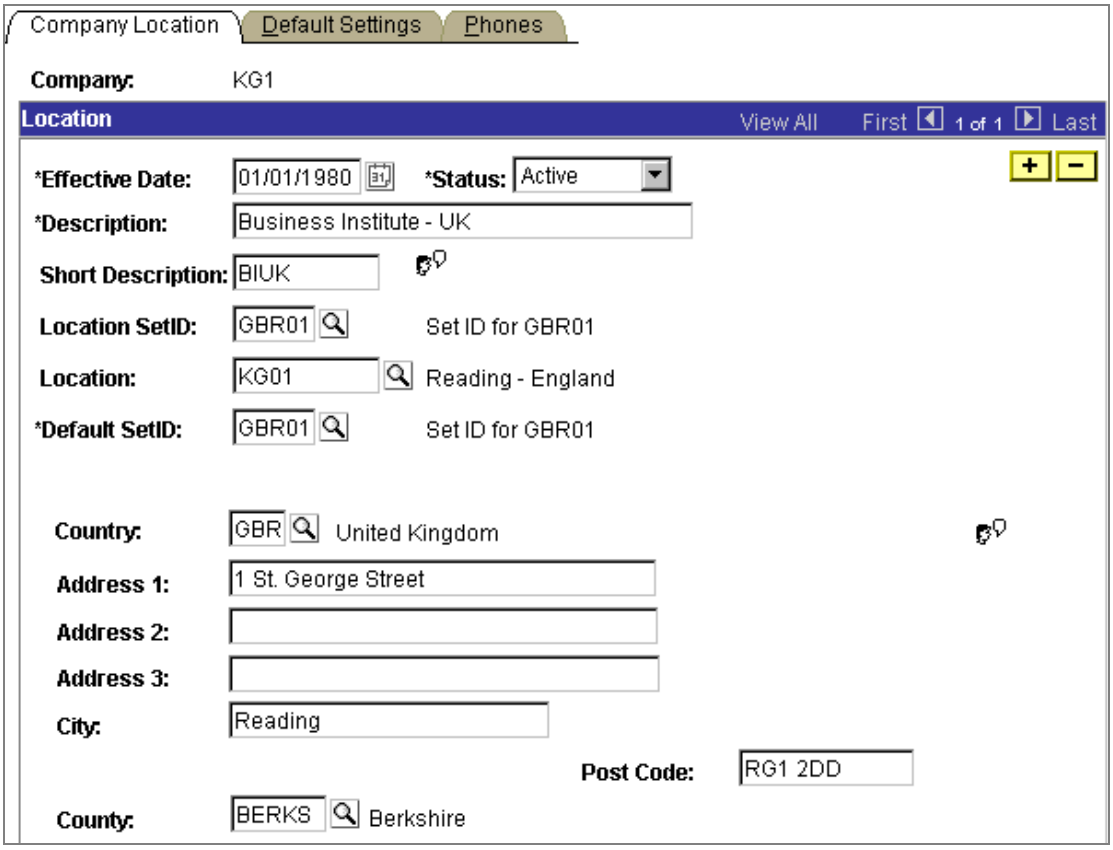
Pages Used to Enter Company Information

Page Name	*Object Name*	*Navigation*	*Usage*
Company Location	COMPANY_TABLE1	• Define Business Rules, Manage Human Resources (GBL), Setup, Company Table, Company Location • Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Agency Location	Define and describe companies.

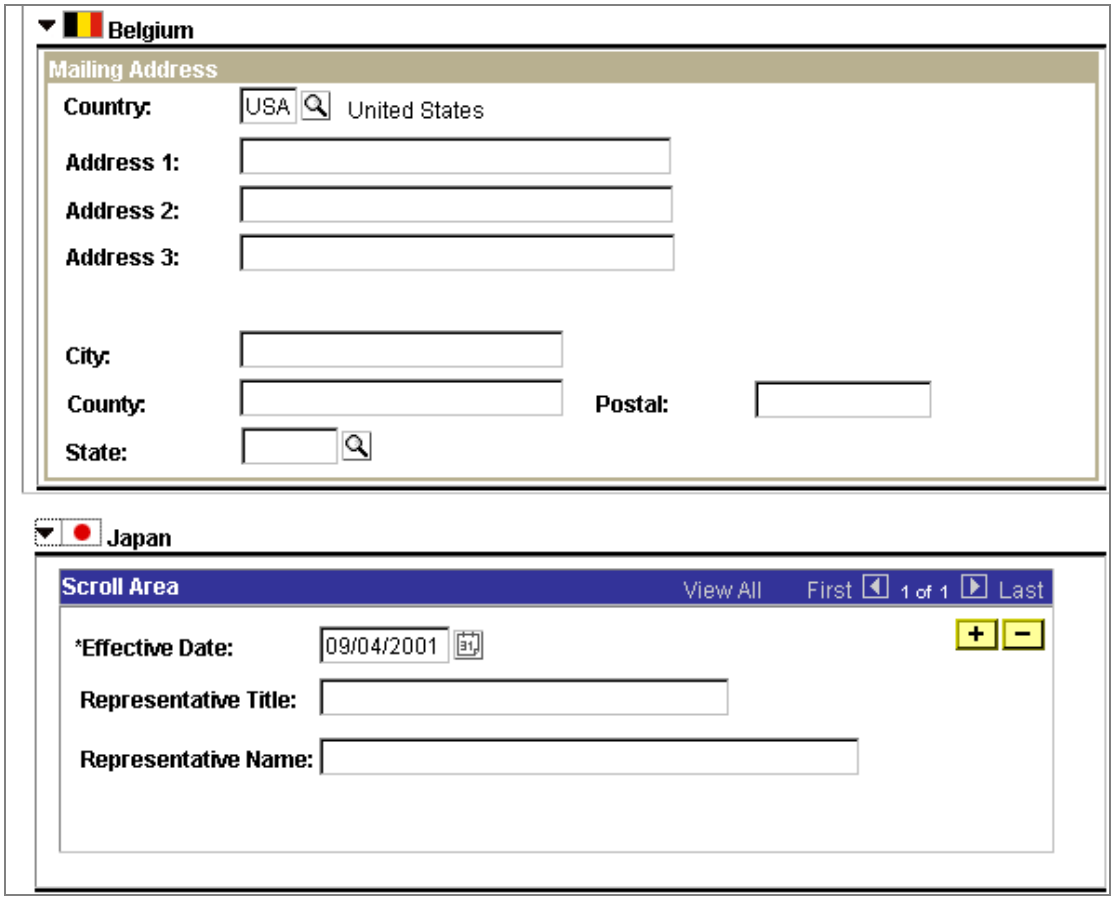
Page Name	Object Name	Navigation	Usage
Default Settings	COMPANY_TABLE2_GBL	• Define Business Rules, Manage Human Resources (GBL), Setup, Company Table, Default Settings • Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Default Settings	Set up default company information; for example, the company pay group, salary point values, and Claeys formula factors for Belgian companies.
(BEL) Claeys	COMP_TBL2ABEL_SBP	Click the Claeys link on the Default Settings page.	Enter the default information and salary factors that are used to perform Claeys formula calculations.
(BEL) Providers	COMP_TBL2BBEL_SBP	Click the Providers link on the Default Settings page.	Associate a provider with a setID.
(USA) Tips Processing	COMP_TBL6USA_SEC	Click the Tips Processing link on the Default Settings page.	Set up tip allocation.
Phones	COMPANY_TABLE3_GBL	• Define Business Rules, Manage Human Resources (GBL), Setup, Company Table, Phones • Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Phones	Enter telephone information for a company.

Defining Companies

Access the Company Location page.



Company Location page (1 of 2)



Company Location page (2 of2)

For a single-company environment, you set up this table only once; for multiple-company environments, you set up a company code for each company.

Default SetID This value is used as the default setID on the Balance ID Table.

(BEL) Belgium

Enter the address information for your Belgian companies.

(JPN) Japan

Representative's Title Enter the title of your company's representative as of the effective date. This is the person whose title (and name) appears by default on the Appointment Notification report page.

If you accept the default—which you can override on the report page—the title and name appear on the Notification of (Hiring, Department Change, Grade Advance or Termination) pages.

Representative's Name Enter the representative's name. You can override this default on the Appointment Notification report page.

See Also

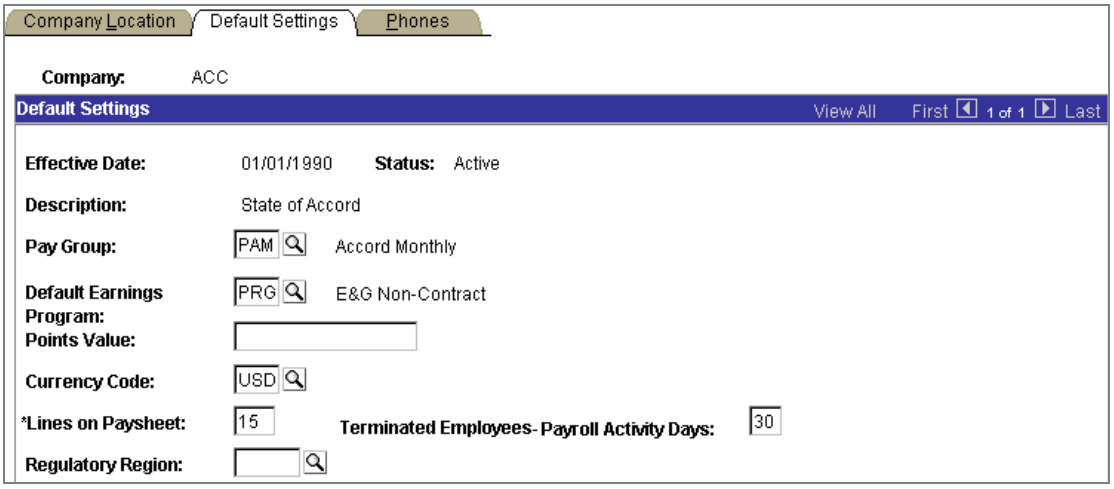
"Regulating PeopleSoft HRMS Data," Understanding the Relationship Between SetIDs and TableSets

"Setting Up PeopleSoft HRMS," Specifying the Address Format for a Country

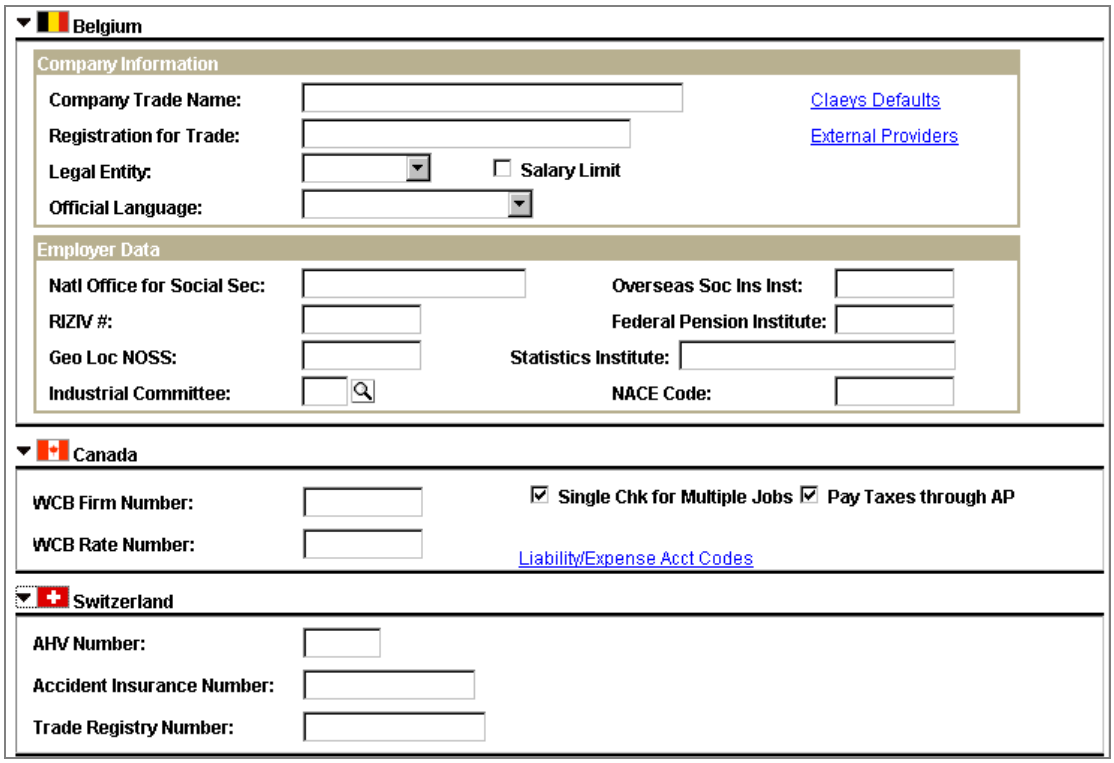
PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information," (JPN) Appointment Reporting for Job Data Changes

Setting Default Information for Companies

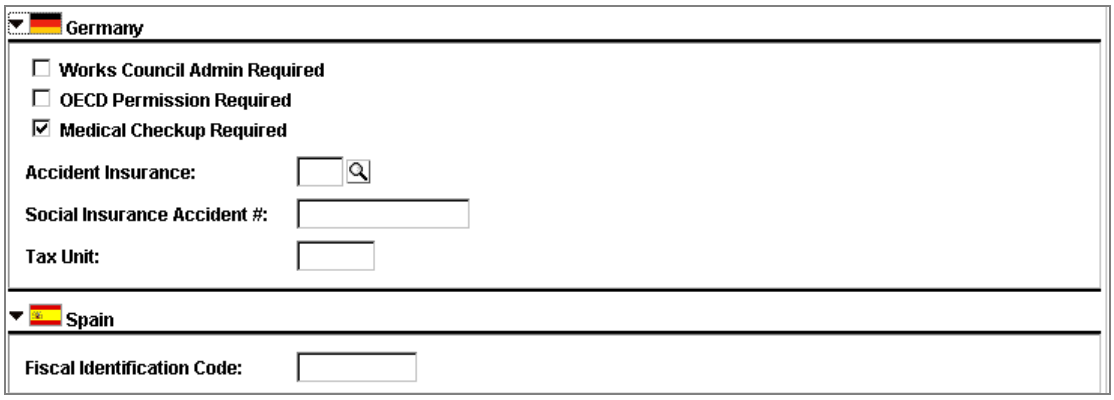
Access the Default Settings page.



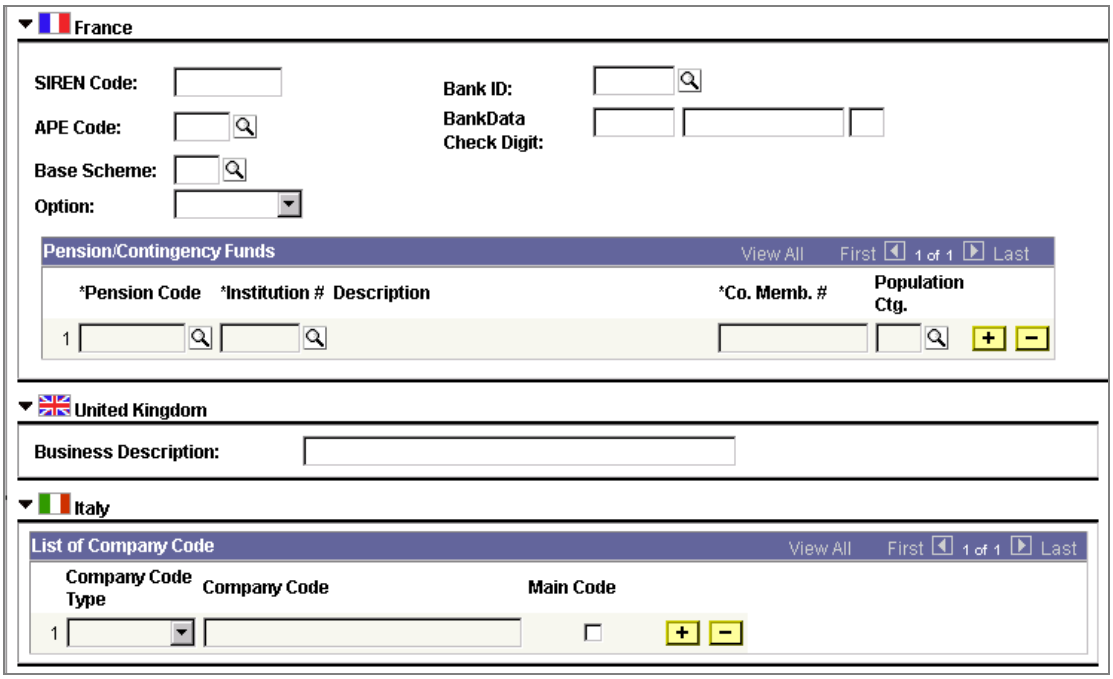
Default Settings page (1 of 7)



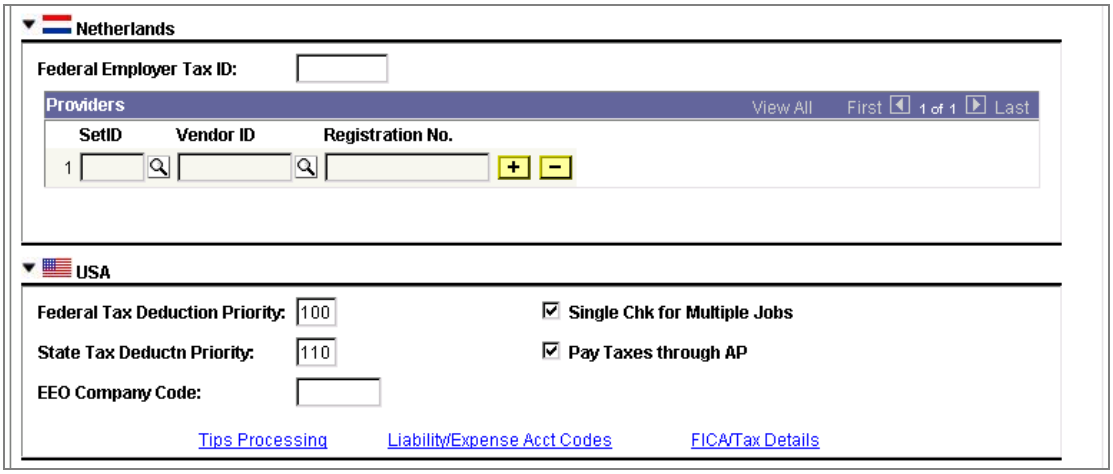
Default Settings page (2 of 7)



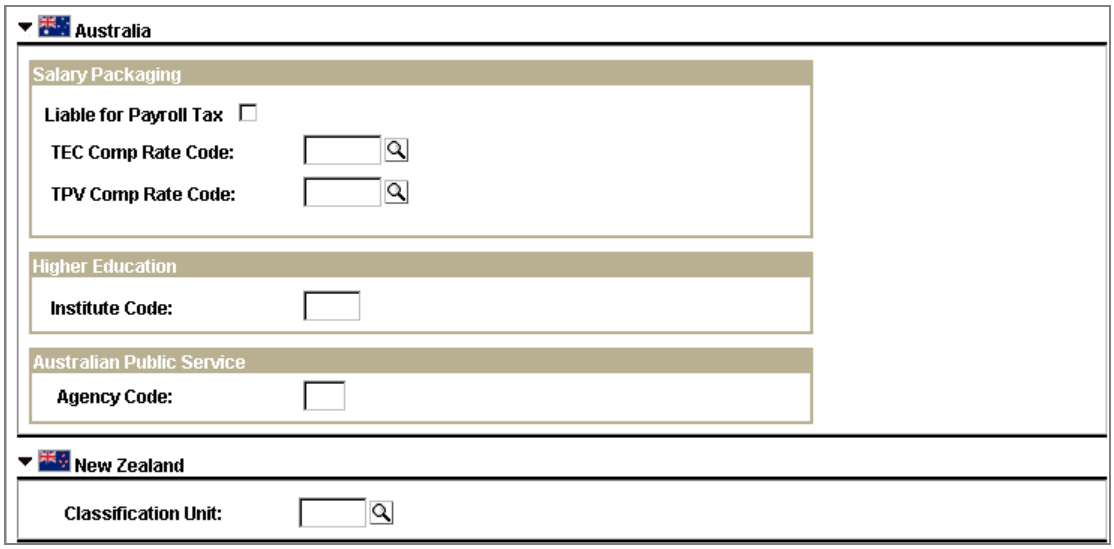
Default Settings page (3 of 7)



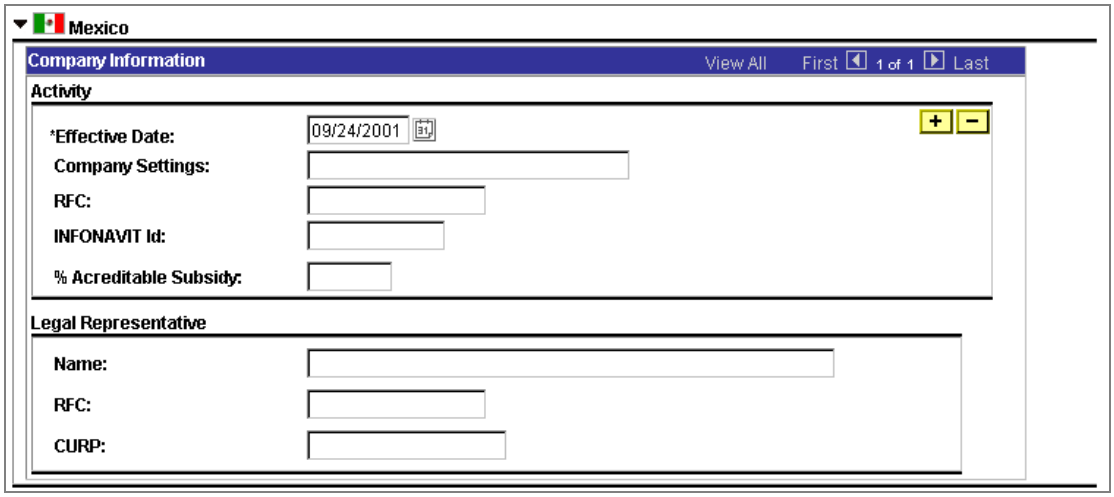
Default Settings page (4 of 7)



Default Settings page (5 of 7)



Default Settings page (6 of 7)



Default Settings page (7 of 7)

Defaults

Pay Group If you enter a value in this field, the pay group appears as the default for all employees in this company. You save data-entry time at the employee level if most employees have the same pay group.

Note. The size of this field varies depending on whether you use PeopleSoft Global Payroll or PeopleSoft Payroll for North America. First, set up your PeopleSoft Global Payroll or PeopleSoft Payroll for North America pay groups to make them available here. Where you do that depends on which payroll application you use.

Points Value Enter the monetary value of your points.

Lines on Paysheet	Enter the number of lines for the paysheet. Paysheets serve as a repository for the data that is required to calculate the employee pay for each pay period.
Terminated Employees Payroll Activity Days	The system issues a warning if a terminated employee has payroll activity after the number of days that you specify.

(BEL) Belgium

Company Trade Name	Enter the name of your Belgian company; for example, Continental Commerce - Belgium.
Registration for Trade	Enter the company's official registration number from the Belgian Trade Register.
Legal Entity	A legal entity is the legal form that applies to a company: ***Inc*** (corporation), ***Coop*** (cooperative), and so forth. The translate values reference different forms that you can select to indicate whether the company is public or privately held or whether it is of limited liability.
Salary Limit	Select to set a maximum salary limit. While selecting this check box doesn't enforce any salary limits in the system, you can use it as a reference to prevent salary raises that exceed company limits or that would occur during periods where increases aren't allowed. If your organization enforces periods where no salary increases are allowed or limits employee salary increases, you can modify the PeopleCode behind this page. Then, when you select this check box, the system it to ensure that no raises are allowed during these periods.
Official Language	Select the company official language. This value is used as the default employee official language, with the exception of companies located in the Brussels-Capital Region, for which the employee preferred language is used as the default.
Claeys Defaults	Click to enter Claeys default and salary factor information on the Claeys page.
External Providers	Click to enter Belgian provider information for tracking third-party providers on the Providers page.
National Office for Social Sec (national office for social security)	Enter the number under which the company is registered at the National Office for Social Security.
Overseas Soc Ins Inst (overseas social insurance institution, federal pension institute)	Enter the company's overseas social insurance institution, federal pension institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.

RIZIV # (RIZIV number)	Enter the RIZIV code. It records the company's Federal Institute for Illness and Disability Insurance category.
Geo Loc NOSS (geographic location for State Social Insurance category)	Enter the geographical location for the NOSS.
Statistics Institute	Enter the statistics institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.
Industrial Committee	Select the appropriate industrial committee for the company. You can override this value at the department level.
NACE Code	Enter the NACE code for the company. **Note.** The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

WCB Firm Number (Workers' Compensation Board firm number) and **WCB Rate Number**	Enter if you are tracking WCB data for Canadian employees.
Pay Taxes through AP (pay taxes through Accounts Payable)	Select to indicate if this company is tracking its taxes through Accounts Payable.
Liability/Expense Acct Codes	Click this link to enter information about general ledger liability and expense account codes. **Note.** For more information about entering liability/expense account codes, see the PeopleSoft Payroll for North America documentation.

(CHE) Switzerland

AHV Number *(Alters-und Hinterbliebenen Versicherung* number)	Enter the number of the responsible AHV compensation office. This numeric code can be up to 6 characters.
Accident Insurance Number	Enter the number assigned to the company by its accident insurance company. Use this number in health and safety reporting.
Trade Registry Number	Enter the number assigned to the company by the Trade Registry office. The format is 999.9.999.999-9.

(GER) Germany

Works Council Admin Required (Works Council administration required)	Select if Works Council administration is required for this German company. Depending on whether this check box is selected, the Works Council is involved in different action/action reason transactions that occur on the Job record.
OECD Permission Required (Organization for Economic Cooperation and Development permission required)	Select if applicable. Germany requires OECD permission for workers from non-OECD countries to work in certain types of industry, such as defense or high technology.
Medical Checkup Required	Select if a medical checkup is required for your workers under German labor law.

(ESP) Spain

Fiscal Identification Code	Enter your company's fiscal identification code as assigned by the Spanish government.

(FRA) France

SIREN Code (*Systeme Informatique pour le Repertoire des Entreprises* code)	Enter a SIREN code for this organization. This code is assigned to a company when it registers as a business with the French government. The code isn't required for your human resources system, but is required on many company documents.
APE Code *(Activite Principale Exercee* code)	Select an APE code. This code serves as a classification of the type of industry that the company is involved in (banking, software, insurance, and so forth). The code is required by French law and must appear on all company regulatory reports.
BankData Check Digit	Enter a bank data check digit (optional).
Pension Code	Select the code for the pension companies used by this French company.
Institution # (institution number)	Select the institution number for the pension companies used by this French company.
Co. Memb. # (company membership number)	Enter the membership number that was assigned to this company when it registered with the pension company.

Note. The system doesn't check the format of the numbers that you enter in the fields on this page.

(GBR) UK

Business Description	Enter the company business description. This information is used on the two local UK RIDDOR reports, which are located on the Monitor Health/Safety menu. The system prints the business description of the relevant company from the Job record of each employee.

(ITA) Italy

Company Code	Enter the company code that is assigned to your company by the Italian regulatory authorities.
Main Code	Select if this is the main company code that is used for reporting purposes.

(NLD) Netherlands

Federal Employer Tax ID	Enter the tax ID number that is provided by the Dutch government.
Vendor ID	Select from the list of insurance providers.
Registration No. (registration number)	Enter the registration number for the insurance provider, which you obtain from the provider.

Note. The information that you enter on this page is for informational purposes only, but can be included in reporting or as information that you pass to your organization's payroll system.

(USA) USA

Federal Tax Deduction Priority	Enter the federal tax deduction priority if you are using PeopleSoft Payroll for North America.
State Tax Deductn Priority (state tax deduction priority)	Enter the state tax deduction priority if you are using PeopleSoft Payroll for North America.
EEO Company Code (equal employment opportunity company code)	If the U.S. government has assigned this company a code for EE0-1 and VETS 100 reporting, enter the number.
Tips Processing	If you are using PeopleSoft Payroll for North America, click to set up the parameters for handling tips in your company's environment.
Liability/Expense Acct Codes	Click to enter information about general ledger liability and expense account codes.
FICA/Tax Details	Click to enter FICA and tax details.

(AUS) Australia

Liable for Payroll tax — Specify whether tax is applicable to the default compensation rate components. When you select this check box, the state payroll tax rates you set up on the State Payroll Tax page are used in the package compensation calculation for your salary-packaged employees.

TEC Comp Rate Code and **TPV Comp Rate Code** — Specify the default compensation rate code for TPV (Total Package Value) and TEC (Total Employment Cost) that you will use in salary packaging enrollment.

You set up your compensation rate codes on the Comp Rate Code Table page.

Institute Code — This group box appears only if you've selected the Education & Government check box on the Country Specific page of the Installation component. Enter the Institute Code identifier for DETYA reporting. This is used by the system to track information about the institute for reporting purposes and defaults on any page where this is required information.

Agency Code — This group box appears only if you've selected the Education & Government check box on the Country Specific page of the Installation component. Enter the agency code for the company.

(NZL) New Zealand

Classification Unit — Enter the classification unit for your company. This information comes from the Classification Unit Table. The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

(MEX) Mexico

Company Information

Company Settings — Define the company's activity. Typical values are ***Financial, Pharmaceutical, Manufacturing, Services, Tourism,*** and ***Sales.***

RFC — Enter the RFC ID for your company.

The Mexican Treasury (*Secretaria de Hacienda y Credito Publico*) identifies each company with an RFC ID. Social security, taxes, and payroll reports use the RFC ID.

INFONAVIT ID — Enter the INFONAVIT ID for your company.

% Acreditable Subsidy — Enter the percentage of accreditable subsidy. This value is used to calculate federal taxes.

Name	Enter the name of the person who acts as the legal representative for the company.
RFC and **CURP**	Enter these values for the legal representative.

See Also

"Setting Up Jobs and Pay Groups," Maintaining Pay Groups

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Managing Labor Relations," (GER) Entering German Works Council Decisions

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "Setting Up Additional tables for Global Incident Reporting," (GBR) Setting Up Reporting to the Health and Safety Executive (HSE) in the United Kingdom

PeopleSoft Human Resources PeopleBook: Administer Salary Packaging "(AUS) Setting Up Salary Packaging," (AUS) Setting up Salary Packaging Company Payroll Tax Options

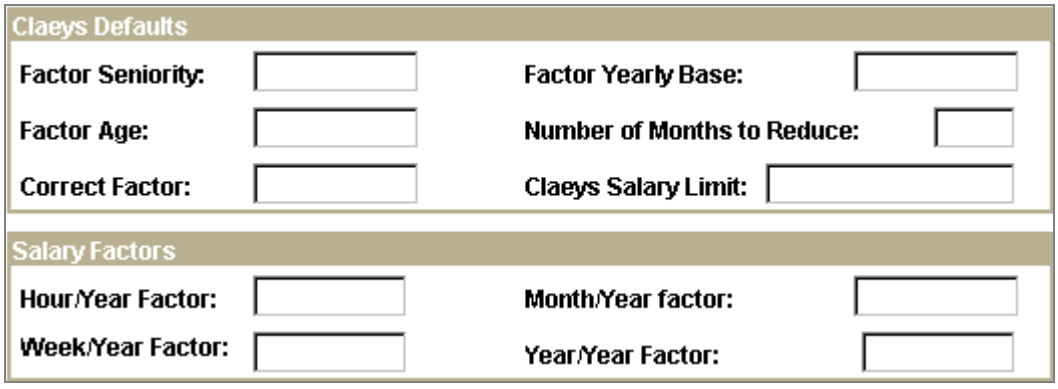
"Working With Multiple Components of Pay," Defining Rate Codes

PeopleSoft Payroll for North America PeopleBook

PeopleSoft Global Payroll PeopleBook

(BEL) Entering Default Information and Salary Factors

Access the Claeys page.



Claeys page

Claeys Salary Limit	Enter the salary limit for applying the Claeys formula.
Hour/Year Factor	Enter the hour/year factor to calculate the hourly amount that an employee earns and gross that amount up to the yearly total.
Month/Year Factor	Enter the month/year factor to calculate the monthly amount that an employee earns and gross that amount up to the yearly total.

Week/Year Enter the week and year to calculate the weekly amount that an employee earns and gross that amount up to the yearly total.

Year/Year Enter the year/year factor to calculate the yearly total.

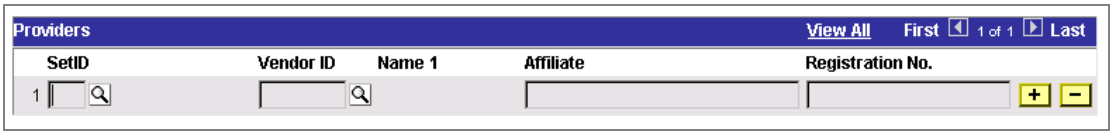
Note. In Belgium, the year factor is 13.85.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Managing Country-Specific Workforce Data," (BEL) Preparing For Severance Calculations and (BEL) Recording Terms for Ending Employment Contracts

(BEL) Associating a Provider With a SetID

Access the Providers page.



Providers page

SetID and **Vendor ID** Select from the list of options. The system lists all valid providers, not just Belgian providers.

Affiliate Enter the affiliate, if applicable.

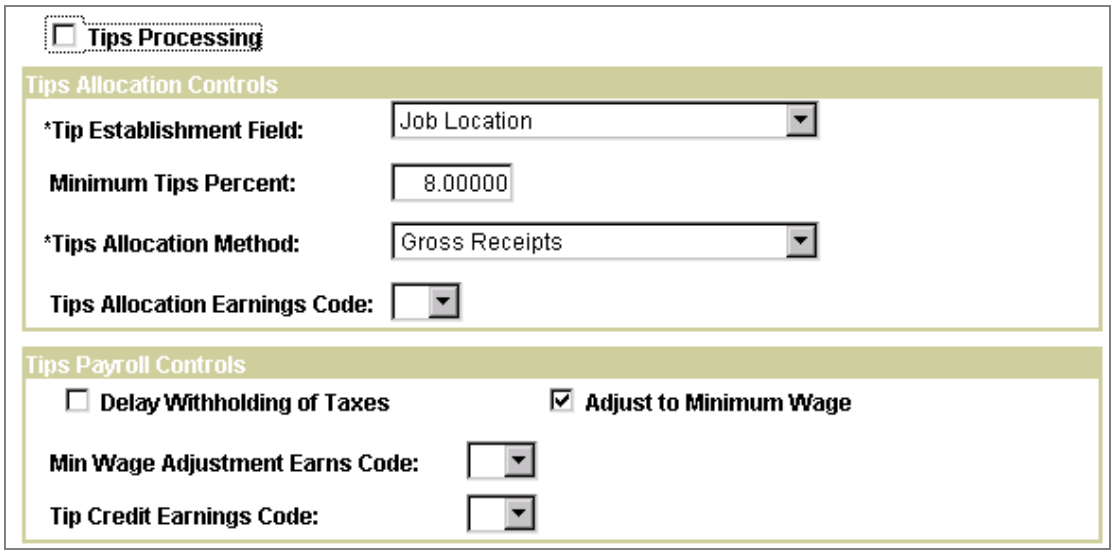
Registration No. (registration number) Enter the registration number, if applicable.

See Also

"Setting Up Vendors"

(USA) Setting Up Tip Allocation

Access the Tips Processing page.



Tips Processing page

Tips Processing Select to indicate the use of this feature. Tip allocation is required when the amount of tips reported by tipped employees for a pay period is less than a specified percentage of an establishment's gross receipts for that period.

Tip Establishment Field This field designates where the tips are acquired. Tips allocation is done for each establishment. An establishment is an individual restaurant, hotel, or other unique location. If a company has 15 restaurants, tips are allocated separately for each restaurant.

Minimum Tips Percent Enter the minimum percentage of tips to be distributed to employees. The percentage specified by the federal regulations is 8 percent. Employers can apply for a lower percentage if it can be shown in writing that the tip rate at an establishment is less than 8 percent.

Tips Allocation Method Select the tip allocation method used for this company. Only establishments that employ fewer than 25 employees (tipped and nontipped) during a pay period can use the ***Hours Worked*** method.

Tips Allocation Earnings Code Select the earnings code to record the amount calculated by the tip allocation process.

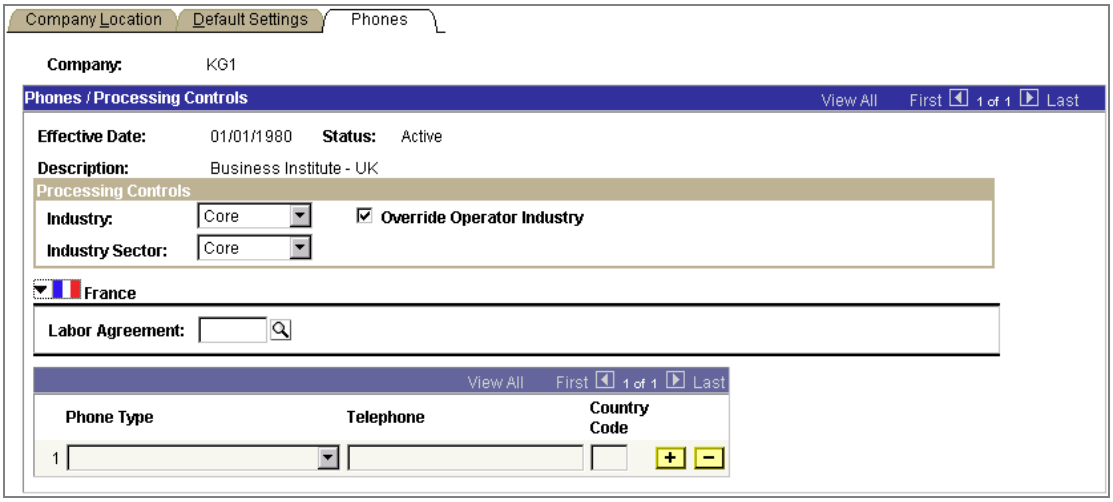
Delay Withholding of Taxes Select if your company delays collecting taxes on tips until an employee has reported earning more than $20.00 in tips in a month.

Min Wage Adjustment Earns Code (minimum wage adjustment earnings code) Select the earnings code to be used when tips plus wages do not meet statutory minimum wage requirements.

Tip Credit Earnings Code Select an earnings code for recording tip credits. Tip credits are memo earnings to identify what portion of reported tips goes toward payment of the federal minimum wage (state minimum wage is used if it is higher than the federal minimum wage).

Entering Phone Information

Access the Phones page.



Phones page

Processing Controls

Override Operator Industry Select if the operator industry can be overridden.

(FRA) France

Labor Agreement Select a Collective Labor Agreement code from the list.

Note. French pension administration functionality isn't part of PeopleSoft Pension Administration.

Phone Type and **Telephone** Enter the phone type, such as ***Business, Home,*** and so forth, and the phone number. The phone fields are effective-dated and scrollable so that you can enter multiple phone types and maintain history data. You'll see this standard phone functionality on pages throughout the system.

(USF) Entering Agency Information

Use the Agency Table component to enter information about a single agency or sub-agencies in your organization, from the central agency address to general ledger accounts, tax information, and payroll processing information. Most pages contain data from PeopleSoft Payroll for North America.

If you use only PeopleSoft Human Resources, you enter information only on the first page, the Agency Location page, for each agency that you want to add. You can also associate a default pay group with the agency on the Default Settings page. The value that you select appears as the default on the Job Data pages for employees in this agency. However, it is easiest to treat each agency that you add as a separate tax entity, as though you were using PeopleSoft Payroll for North America.

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.

If your agency uses PeopleSoft Payroll for North America, each sub-agency that you add must be equivalent to each EIN that you use. Your payroll staff needs to complete all nine pages at least once to add an agency EIN.

See Also

PeopleSoft Payroll for North America PeopleBook

Pages Used to Enter Agency Information

Page Name	*Object Name*	*Navigation*	*Usage*
Payroll Interface Information	GVT_COMPANY_TBL7	Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Payroll Interface Information	Enter the agency's payroll interface information.
Payroll Office Address	GVT_COMPANY_TBL8	Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, Payroll Office Address	Enter the agency's payroll office address information.
ECS Address (electronic certification system address)	GVT_COMPANY_TBL9	Define Business Rules, Manage Human Resources (USF), Setup, Agency Table, ECS Address	Enter the agency's ECS address information.

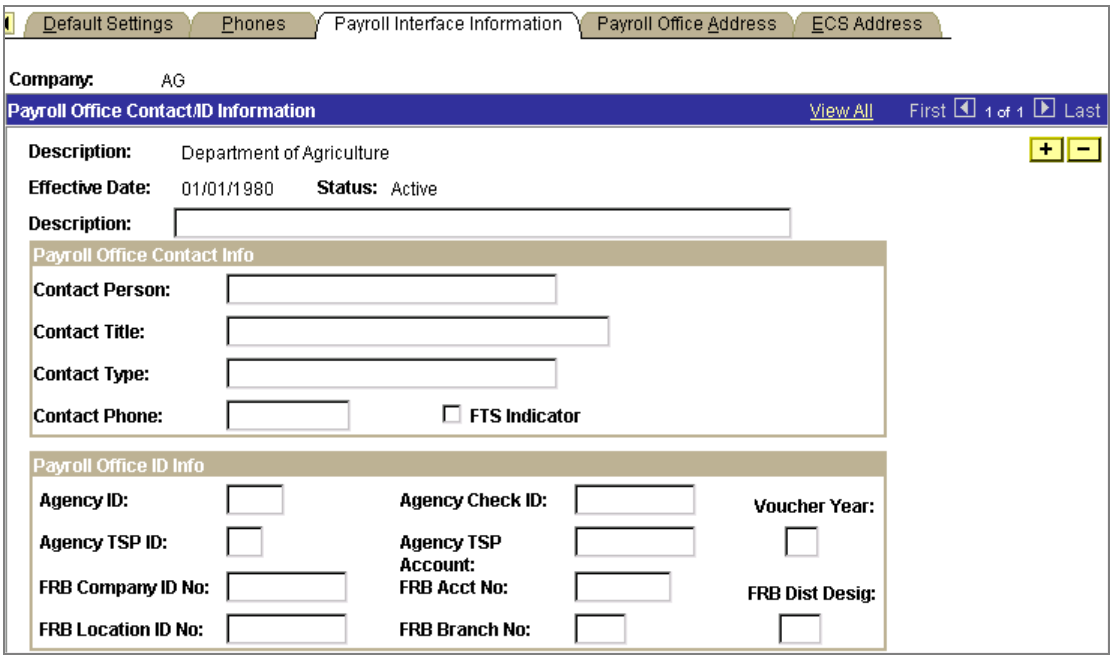
Note. The Agency Location, Default Settings, and Phones pages in the Agency Table component are identical to those in the Company Table component and share the same object names.

See Also

Entering Company Information

Entering Payroll Information

Access the Payroll Interface Information page.



Payroll Interface Information page

FIS Indicator Select if the phone number is an FIS number.

FRB Company ID No. (FRB company ID number), **FRB Location ID No.** (FRB location ID number), **FRB Acct No.** (FRB account number), **FRB Branch No.** (FRB branch number), and **FRB Dist Desig.** (FRB district designation) If necessary, enter FRB information.

See Also

PeopleSoft Payroll for North America PeopleBook

Establishing Locations

Use the Location Table to establish physical locations in your organization, such as corporate headquarters, branch offices, remote sales offices, and so forth. If you use PeopleSoft Global Payroll, you may want to report certain information by location, so consider this when planning your implementation of this information.

If you use PeopleSoft Pension Administration, you can use the same locations that you use for employees, or you can create one or more locations specifically for pension payees. You can use a single *retiree location* for all retirees if you don't need to report on your payees based on more specific location information.

Various pages in PeopleSoft Human Resources reference the information that you define in the Location Table. In recruitment, for example, applicants can specify work preference by location. In career planning, you can assign training courses to locations.

The remainder of this section describes how to:

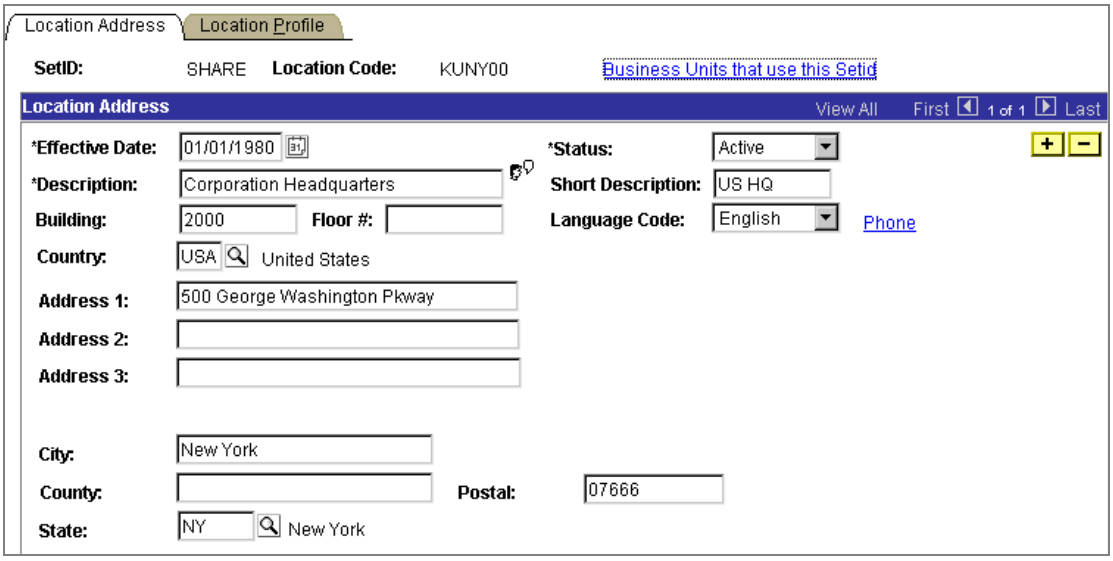
- Enter physical locations in your organization.
- Enter phone numbers for the location addresses.
- Set up a location profile, specifying a salary administration plan, tax information, and local country information.

Pages Used to Establish Locations

Page Name	*Object Name*	*Navigation*	*Usage*
Location Address	LOCATION_TABLE1	Define Business Rules, Manage Human Resources (GBL), Setup, Location Table, Location Address	Enter physical locations in your organization, such as corporate headquarters, branch offices, and remote sales offices.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter phone numbers for the location addresses.
Location Profile	LOCATION_TBL2_GBL	Define Business Rules, Manage Human Resources (GBL), Setup, Location Table, Location Profile	Specify a salary administration plan for the location, as well as tax and local country information.

Entering Company Locations

Access the Location Address page.



Location Address page

Building Enter the building location, if applicable. For example, your corporate headquarters might be located in building 4 in an office park.

Floor # (floor number) Enter the floor number, if applicable.

Language Code Select the code for the official language used at this location.

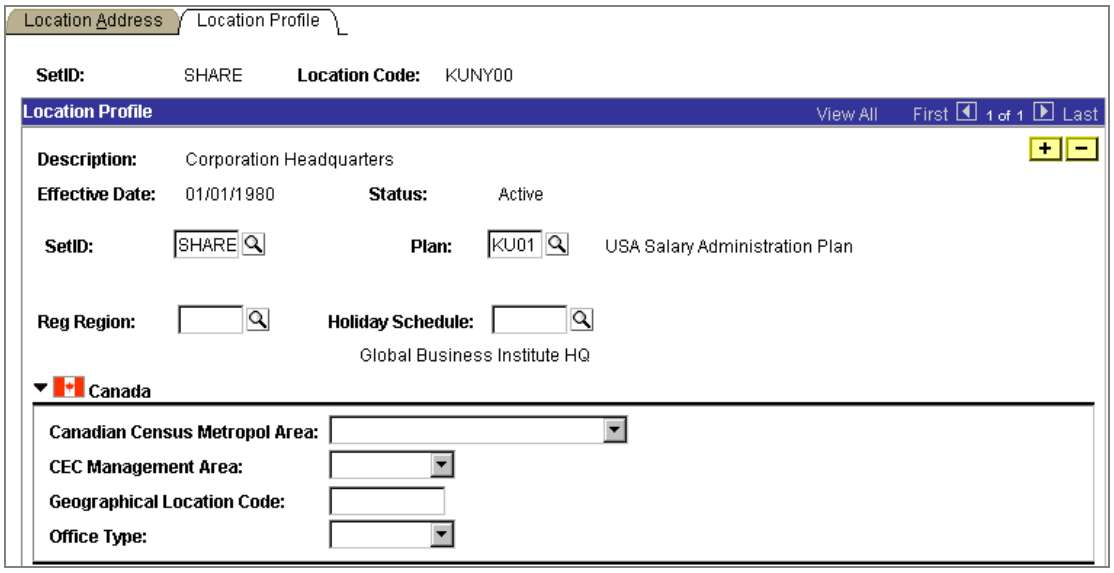
Phone Click this link to enter phone numbers.

See Also

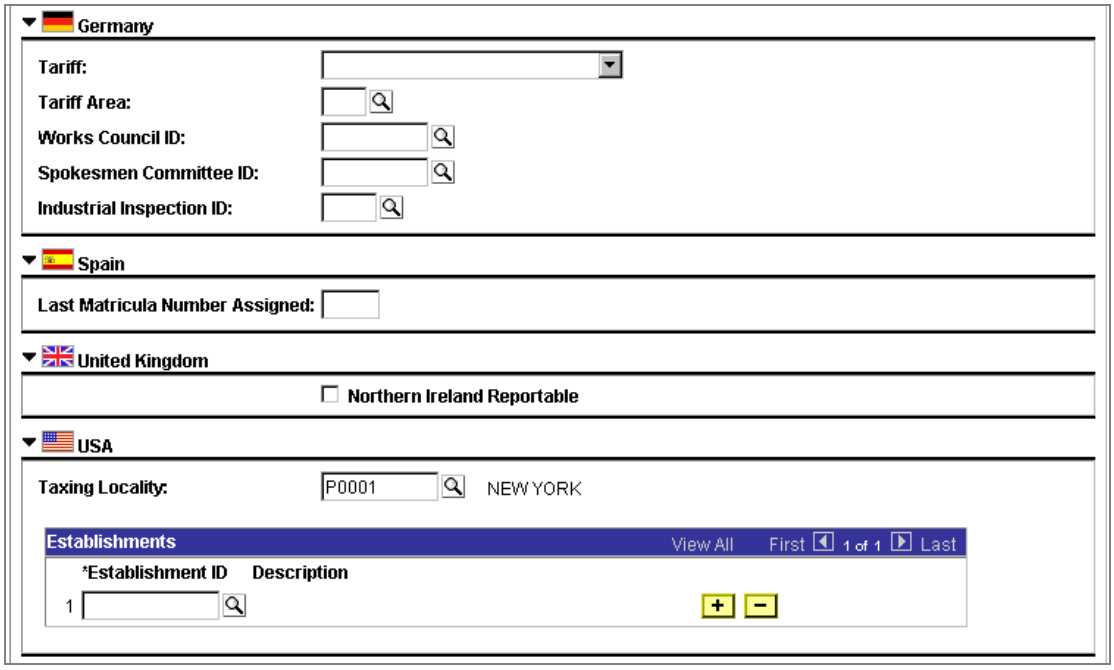
"Setting Up PeopleSoft HRMS," Specifying the Address Format for a Country

Setting Up a Location Profile

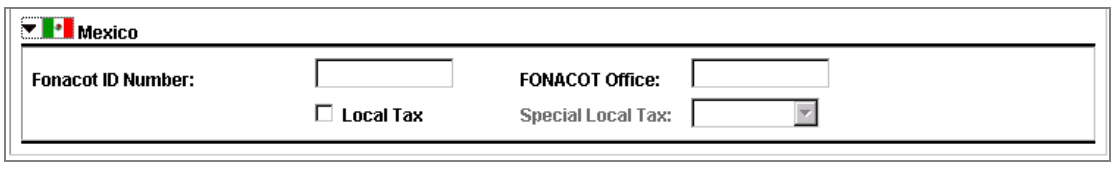
Access the Location Profile page.



Location Profile page (1 of 3)



Location Profile page (2 of 3)



Location Profile page (3 of 3)

You enter U.S. tax information for Canadian and German locations on this page.

(CAN) If the Official Languages Act applies to your organization, use the information in the Geographic Location Code, Office Type, TBS Office Code, and National Capital Region fields as part of the Official Languages reports (PER102CN and PER108CN) that you submit to the Canadian government.

Note. PeopleSoft Payroll for North America references the Tax Location Table for location information, and PeopleSoft Pension Administration references the PeopleSoft Payroll for North America tax information. For more information about the relationship between the Location Table and the Tax Location Table in PeopleSoft Payroll for North America, see the PeopleSoft Payroll for North America documentation.

Plan

Select a salary administration plan from the values that you created on the Salary Administration Plan Table.

Tying a salary administration plan for a location helps you distinguish currency and cost-of-living differences for employees with the same job code. If you don't need to distinguish salary administration plans by location, leave this field blank.

Note. Select only the plans that are associated with the setID that you selected on the Salary Administration Plan Table. If you select a salary administration plan on this page, the system uses that plan as the default value on the Job Data pages for the employees in this location. Otherwise, it uses the salary administration plan that you enter on the Job Code Table.

Reg Region (regulatory region)

Enter the regulatory region that is associated with this location.

Holiday Schedule

Select a holiday schedule for this location.

Note. The holiday schedule on this page is for informational purposes only. Assigned pay groups control default holiday schedule.

(CAN) Canada

Canadian Census Metropol Area (Canadian Census Metropolitan Area)

The system displays the Canadian Census Metropolitan Area (CMA) code that is prescribed by Statistics Canada according to the address information that you entered in Location Table 1 (you can override this information). CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required.

CEC Management Area (Canada Employment Center Management Area)

Select from the list of options.

Geographical Location Code	Enter the geographic location code as defined by Statistics Canada.

See Also

Processing Transactions Using Regulatory Regions

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

(GER) Germany

Tariff	Enter the *tariff,* or the type of business conducted at this location, such as banking, retail industry, printing, or wood processing.
Industrial Inspection ID	Select the ID for this location from the list of values, if appropriate. Industrial inspection codes are included on Incident and Illness Reports that record the worker accidents and illnesses incurred on the job in the Monitor Health and Safety business process.

Note. When you enter an employee's location on the Job Table, the Tariff and Tariff Area values appear by default from the Location Table, based on the values that you entered on that table for this location.

Note. When you enter an employee's location on the Job Table, the Spokesman Committee ID and Works Council ID values appear by default on the employee's Job record. These values are based on the employee's location in the Job Table and the value of the Labor Type *(Management* or *Non-Management)* in the employee's Job Labor record.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Managing Labor Relations," (GER) Entering German Works Council Decisions

(ESP) 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 list of options. You maintain work center data in the ESP SS Work Center (Spanish Social Security work center) component.
Last Matricula Number Assigned	The Spanish government requires employers to assign each employee a unique matricula number, which is used for government reporting. To avoid duplication of numbers, this field updates and stores the last matricula number assigned.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables

(GBR) United Kingdom

Northern Ireland Reportable	Select if this is a Northern Ireland reportable location. Indicates that employees in this location are to be included in the community background report (Fair Employment Monitoring Return) that is provided for Northern Ireland.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

USA

Taxing Locality	For U.S. companies, select a U.S. taxing locality. This field is for information only.
Estab ID (establishment ID)	Select one or more establishment IDs for this location. Use the establishment-location relationship for affirmative action planning, EEO (Equal Employment Opportunity), OSHA (Occupational Safety and Health Administration), and other U.S. federal reporting regulations.

(MEX) Mexico

Fonacot ID Number	Enter the FONACOT ID for your location. FONACOT is a consumer fund for employees.
FONACOT Office	Identify the nearest FONACOT office for your location.
Tax Local	Select the **Tax Local** check box if the location of the state is Chihuahua.
Tax local Special	If the location of the state is Chihuahua, the **Tax Local Special** field will default to Ciudad Juarez.

See Also

PeopleSoft Payroll for North America PeopleBook

(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.

Various pages in PeopleSoft Human Resources reference the information that 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.

The remainder of this section describes how to:

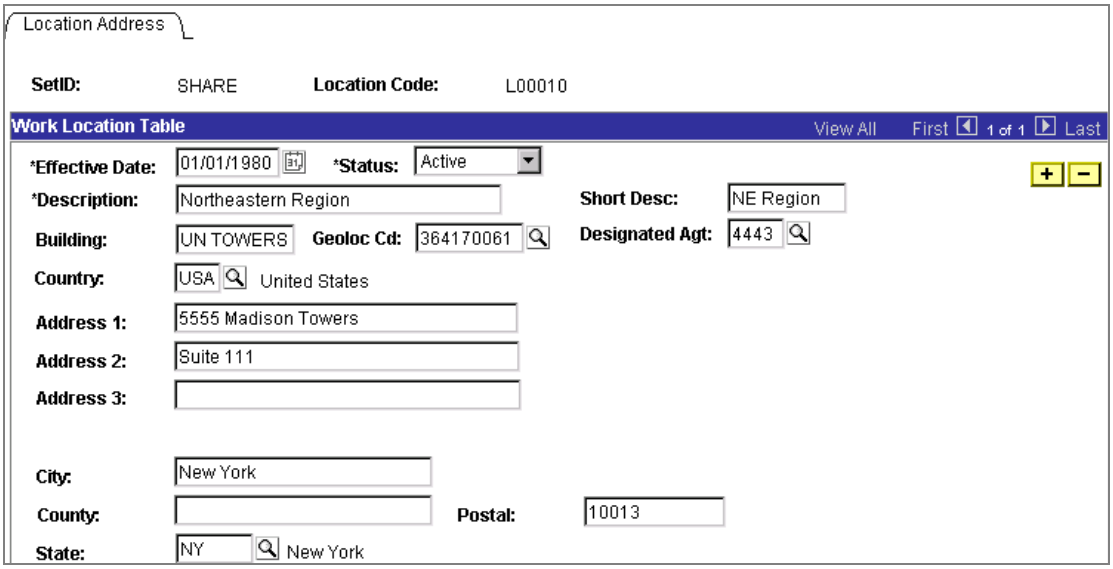
- Add work locations.
- Define geographic locations.
- Define the regions where federal employees receive additional pay above their base pay.

(USF) Pages Used to Establish Locations

Page Name	*Object Name*	*Navigation*	*Usage*
Location Address	GVT_LOC_TABLE1	Define Business Rules, Manage Human Resources (USF), Setup, Work Location Table, Location Address	Add work locations.
Geographic Location Table	GVT_LOCATION	Define Business Rules, Manage Human Resources (USF), Setup, Geographic Location Table, Geographic Location	Define geographic locations.
Locality Pay Area Table	GVT_LOCAREA_TABLE	Define Business Rules, Manage Human Resources (USF), Setup, Locality Pay Area Table, Locality Pay Area Table	Define the regions where federal employees receive additional pay above their base pay.

Adding Work Locations

Access the Location Address page.



Location Address page

Building Enter the building where the location is, if applicable. For example, your national office might be located in the main building of your complex.

Geoloc Cd (geographic location code) Select the geographical location code.

Designated Agt (designated agent) Select the designated agent code.

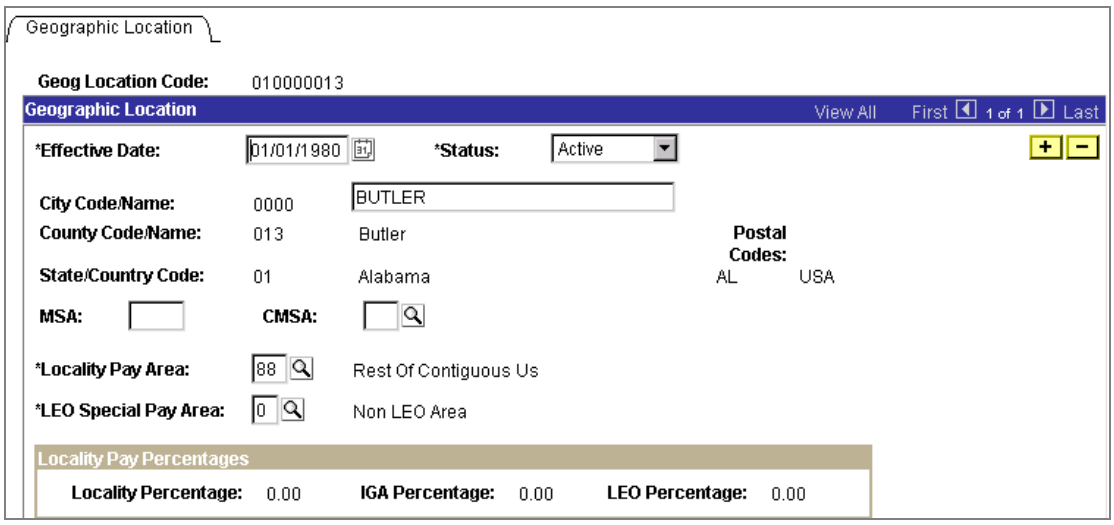
Country Select a country from the list of values and move out of the field. The system displays the appropriate address fields for the country that you selected, using the standard address format that you have set up in the Country Table.

See Also

"Setting Up PeopleSoft HRMS," Specifying the Address Format for a Country

Defining Geographic Locations

Access the Geographic Location Table page.



Geographic Location Table page

City Code/Name The system assigns a city code. Enter the city name.

Locality Pay Area and **LEO Special Pay Area** (law enforcement officer special pay area) Select from the list.

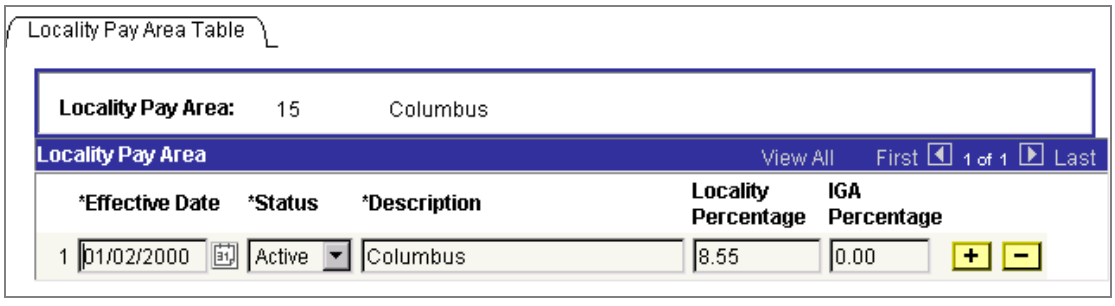
Note. PeopleSoft Payroll for North America references the Tax Location Table for location information.

See Also

PeopleSoft Payroll for North America PeopleBook

Defining Regions for Employees Who Receive Additional Pay

Access the Locality Pay Area Table page.



Locality Pay Area Table page

Federal employees in certain regions receive additional pay above their base pay. PeopleSoft delivers this data, but you might need to change it based on Office of Personnel Management updates.

Effective Date	The first time you set up this table, select an effective date that is early enough to accommodate your organization's oldest historical information.
Status	Select a status. **Note.** Add data rows and use the scroll bar, the **Effective Date** field, and the **Status** field to maintain history data for information that changes over time. For example, to retire a **Locality Pay Area,** insert an effective-dated row with a status of ***Inactive.***
Locality Percentage	Enter the percentage of base pay employees in this region receive above their base pay, which is set by their pay plan, grade, and step. The amount appears on the employee's Compensation Data page in Administer Workforce.

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 use PeopleSoft Pension Administration, you need departments to house your pension payees. You can use a single department for all your pension payees, or you can organize your payees using a department scheme that meets your reporting needs. Otherwise, you can set up departments using any groupings you like.

The departments that you create are also the foundation for building security for employee and pension payee data; that is, granting and denying user access to rows of data in employee tables, categorized by department. To build security, you use departments to set up a reporting hierarchy in a security tree in PeopleSoft Tree Manager. Then you set up user security access and restrictions.

PeopleSoft Human Resources offers two ways to access the Department Table to define and view departments:

- From the Manage Human Resources menu.
- From PeopleSoft Tree Manager.

In this section, we discuss using the Department Table from within the Manage Human Resources menu.

Standard PeopleSoft HRMS security uses department as the means of securing data, including all payroll data. If you use PeopleSoft Payroll for North America or PeopleSoft Global Payroll, and your departments don't reflect your security structure for restricting access to employee data, use a different field for security.

The remainder of this section describes how to:

- Define basic information about a department.

- Enable and control department information for specified customers.

See Also

Administering PeopleSoft Security

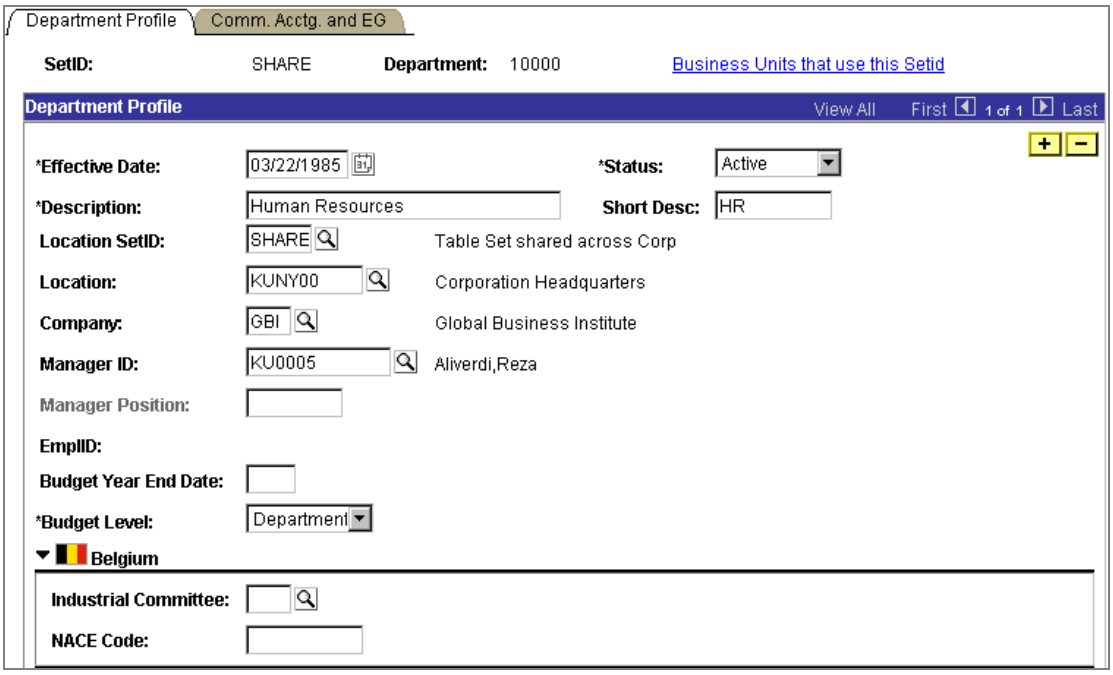
PeopleTools PeopleBook Tree Manager

Pages Used to Maintain Departments

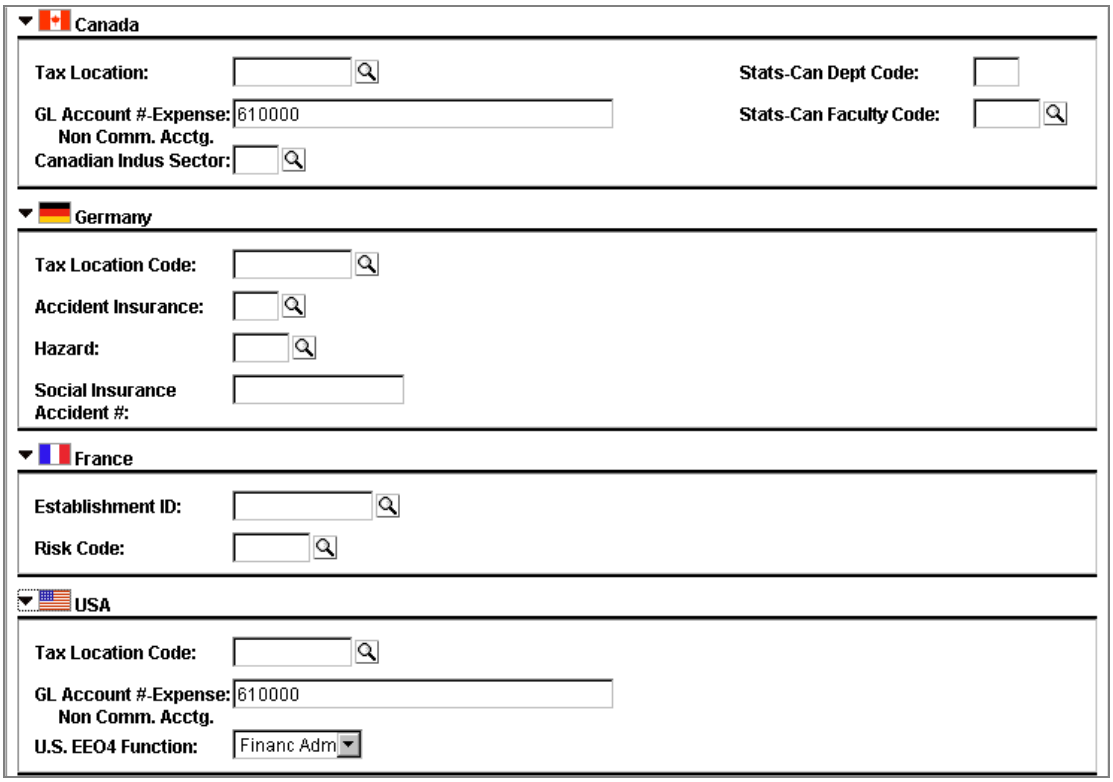
Page Name	*Object Name*	*Navigation*	*Usage*
Department Profile	DEPARTMENT_TBL_GBL	• Define Business Rules, Manage Human Resources (GBL), Setup, Department Table, Department Profile • Define Business Rules, Manage Human Resources (USF), Setup, Department Table, Department Profile	Define basic information about a department. For Payroll for North America: Use department IDs for accounting purposes, such as charging earnings to a department or implementing labor distribution accounting. The system uses department IDs when you sequence pay sheets and paychecks by department.
Comm. Acctg. and EG (department table - commitment accounting and education and government)	DEPARTMENT_TBL_CA	• 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	Enable and control department information that is specific to Education and Government customers and customers who use the Commitment Accounting feature.

Defining Basic Information About a Department

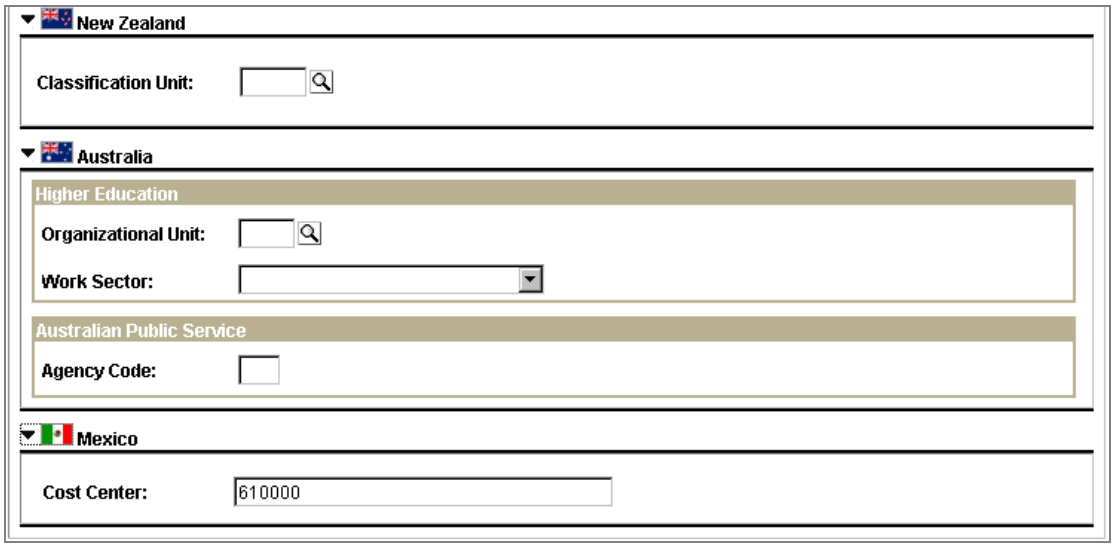
Access the Department Profile page.



Department Profile page (1 of 3)



Department Profile page (2 of 3)



Department Profile page (3 of 3)

Effective Date If you add a new department to the Department Table from the Manage Human Resources menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Description For Payroll for North America: If you use the department specified on the employee's Job record to indicate where to deliver checks, the system automatically prints the department description and code on the check.

Location To associate a department with a physical location, select the location. Maintain these values in the Location Table.

Company Indicate the company to which this department belongs. The system uses the **Company** field value as the default company location on the job records for all employees associated with this department. If you hire employees into this department, the system assumes that 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 on the Job Data pages.

Note. If yours is a multicompany environment and you want more than one company to share the department, leave the **Company** field blank.

Manager ID The manager ID that you select becomes the default supervisor ID on the employee records of all employees who are assigned to this department. If you have more layers in your organization, override the default.

If you use partial position management, where you use positions for only a portion of your organization, select either the **Manager ID** number or the **Manager Position**

number. When you select either field, the system disables the remaining field.

Manager Position — If you use position management, and you have created positions for this department, select a **Manager Position** number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data.

Note. The system allows you to select any position. To have the system prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application 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 date for all positions in this department.

Budget Level — Select ***Department, Job Code, Line Item, Position Number,*** or ***None*** to define budgeting for this department.

(BEL) Belgium

Industrial Committee — Select the industrial committee for the company. This can be overwritten at the department level if necessary.

NACE Code — Enter the NACE code for the company.

Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

Tax Location — Specify the tax jurisdiction for the department. The code that you enter populates the Tax Distribution records of employees of this department. You can override this information for individual employees.

GL Account #-Expense (general ledger account number – expense) — Enter the GL account to which payroll expenses for this department should be posted.

Note. This field is not required for PeopleSoft Payroll for North America and not applicable to PeopleSoft Payroll for Education and Government.

Canadian Indus Sector (Canadian industrial sector) — Select the code that identifies the sector with which employees in this department are associated for Canadian employment equity reporting purposes.

Stats-Can-Dept Code (Statistics Canada department code) — Enter a 3-character code to be reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

Stats-Can Faculty Code (Statistics Canada faculty code)

Select a code to associate a faculty with a department. Faculty codes are set up in the StatsCan Faculty Code table and are used to associate medical and dental categories with faculties. The system uses the faculty code that is associated with this department to determine the medical and dental categories that are reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events, "(CAN) Working with the Statistics Canada Academic Teaching Surveys Process"

(GER) Germany

Tax Location Code

Select a code.

Note. For more information about how tax location codes affect payroll processing for North America, see your PeopleSoft Payroll for North America documentation.

Note. The Accident Insurance, Hazard, and Social Insurance Accident # fields are used to monitor Health and Safety business process functionality in PeopleSoft Human Resources.

(FRA) France

Establishment ID

Select an establishment ID for this department. French Social Security defines a risk code for your establishment, based on the number of work accidents that have occurred in the past three years in a particular establishment. Your establishment must contribute to a Work Accident fund, based on the number of work accidents that occur in your establishment; the more accidents you have, the more you pay into the fund.

Risk Code

Select a risk code from the list of risk codes. You define your organization's percentage of contributions to the French Social Security fund at the department level, based on the risk code that you enter.

(USA) USA

Tax Location Code

Specify the tax jurisdiction for the department. The code that you enter populates the Tax Distribution records of employees of this department. You can override this information for individual employees.

GL Account #-Expense (general ledger number - expense)

Enter the GL account to which payroll expenses for this department should be posted.

Note. This field is not required for PeopleSoft Payroll for North America and not applicable to PeopleSoft Payroll for Education and Government.

U.S. EEO4 Function (United States Equal Employment Opportunity 04 function)

Select the functional category, such as health or fire protection, that applies to this department. The option that you select affects your EEO reporting to the U.S. federal government.

(NZL) New Zealand

Classification Unit

Enter the classification unit for your company. This information comes from the Classification Unit Table. The system uses this data for Accident Rehabilitation Compensation Insurance (ARCI) employer premium calculations.

(AUS) Australia

These fields appear only if you selected the Education & Government check box on Country Specific page of the Installation component.

Organizational Unit

Enter the appropriate Higher Education organizational unit code.

Agency Code

Enter the four-digit Australian Public Service code for this department.

(USF) Department Table Page

For U.S. federal installations, use the Department Table page; fields are the same.

See Also

PeopleTools PeopleBook: Application Designer, "Creating Record Definitions

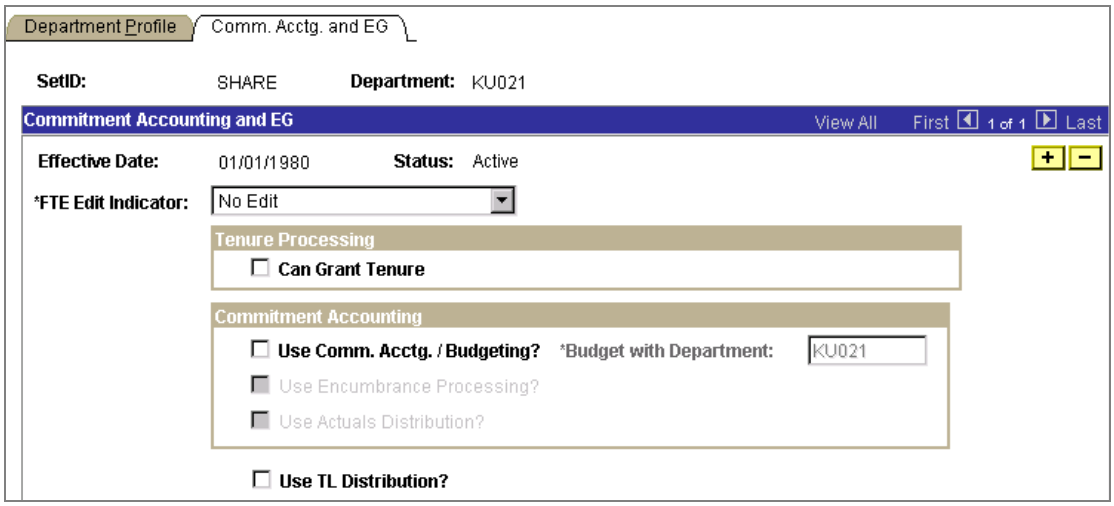
PeopleSoft Human Resources PeopleBook: Manage Positions, "Maximizing Position Data"

PeopleSoft Human Resources PeopleBook: Monitor Health and Safety, "(GER) Monitoring Additional Health and Safety Incident, Injury, and Illness Data For German Employers"

PeopleSoft Payroll for North America PeopleBook

Enabling and Controlling Department Information for Specified Customers

Access the Comm. Acctg. and EG page.



Comm. Acctg. and EG page

FTE Edit Indicator (full-time equivalency edit indicator)

Select whether you want the system to display a warning or an error message when you exceed the FTE maximums for this department. If you don't want the system to perform an FTE edit for this department, select ***No Edit.***

Tenure Processing

Can Grant Tenure

Select to be able to grant tenure to qualified employees in this department.

Commitment Accounting

Use Comm. Acctg. / Budgeting?

Select if you use Commitment Accounting processing for this department. When you select this check box, the **Use Encumbrance Processing?** and **Use Actuals Distribution?** check boxes become available for entry and are selected by default.

Use Encumbrance Processing?

Select if you use Commitment Accounting encumbrance processing for this department.

Use Actuals Distribution?

Select if you use Commitment Accounting's Actuals Distribution process for this department.

Budget with Department

An accumulated budget for a group of departments rolls up to the department that you enter.

The department that you enter must be in the same SetID as the department that you are defining, and it must be higher on the security tree. For example, if departments 00010 and 00012 are lower on the security tree than department 00005 and they have the same SetID, then departments 00010 and 00012 can budget with department 00005. The budgets for 00010 and 00012 roll up into a single budget with 00005.

Use TL Distribution? Select to take into account the task information that is entered into PeopleSoft Time and Labor during Commitment Accounting's Actuals Distribution process. This check box applies only to PeopleSoft Time and Labor customers.

If you select this check box, the Actuals Distribution process creates an entry for each Time and Labor task entry. It then distributes the earnings in the appropriate ratio (the same ratio that is used for Labor Distribution).

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events, "Tracking Tenure," Identifying Departments Capable of Granting Tenure

PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting, "Creating and Posting Actuals Data to PeopleSoft Financials," Running Actuals Distribution

(USF) Setting Up Departments

This section describes how to:

- Set up departments.
- Set up the Commitment Accounting feature for a department.
- Run a Structured Query Report (SQR) audit to cross-check departments.

Page Used to Set Up Federal Departments

Page Name	*Object Name*	*Navigation*	*Usage*
Department Table	GVT_DEPART_TBL_USA	Define Business Rules, Manage Human Resources (USF), Setup, Department Table, Department Table	Set up departments.

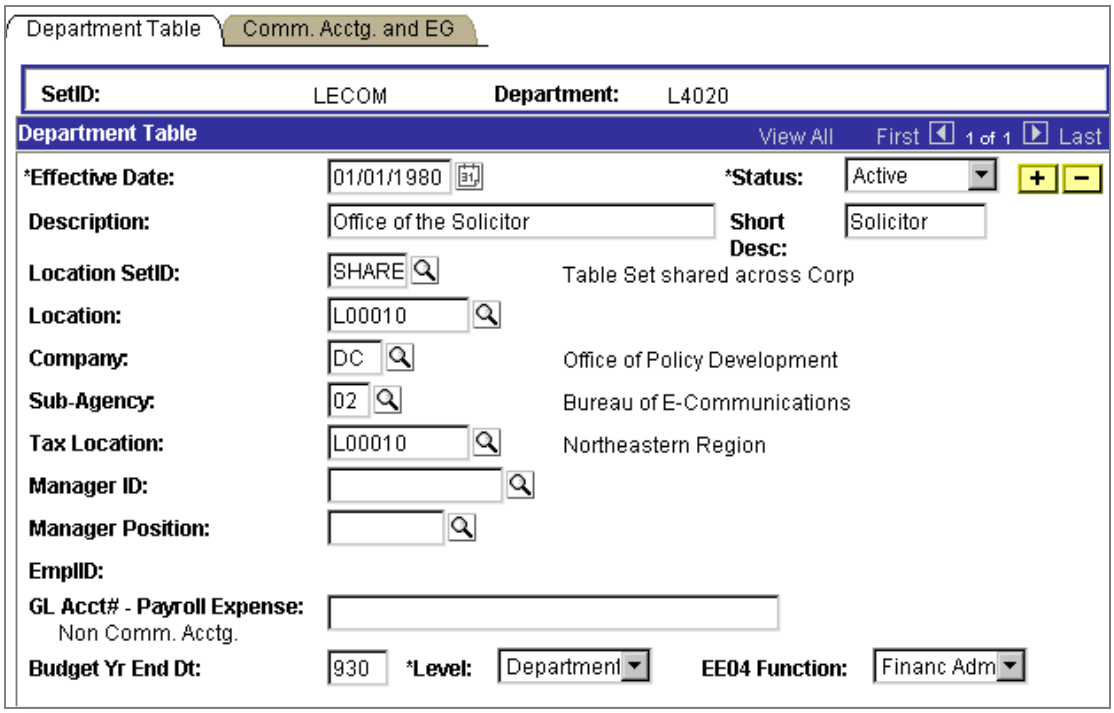
Note. The Department Profile and Comm. Acctg. and EG pages in the USF Department Table component are identical to those in the Department Table component and share the same object names.

See Also

Maintaining Departments

Setting Up Departments

Access the Department Table page.



Department Table page

Effective Date

Important! If you add a new department to this Department Table from the Manage Human Resources (USF) menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Sub-Agency

Select the sub-agency to which this department belongs.

Note. The system uses the **Company** and **Sub-Agency** fields as the default agency/sub-agency location on the Job records for all employees who are associated with this department. If you hire employees into this department, the system assumes that they are also employees of the designated agency/sub-agency. If you don't enter an agency here, you can enter it on the Job Data pages. If you do enter an agency here, you can't change it on the Job Data pages.

Manager ID

The manager ID that you select becomes the default supervisor ID on the employee records of all employees who are assigned to this department. If you have more layers in your organization, override the default.

Manager Position

If you use position management, and you create positions for this department, you can select a manager position number. This field is optional, but you might find it

	useful for reporting activities such as departmental hierarchical data. When you select a manager position number, the system displays whether an employee is assigned to the manager position. **Note.** You can select any position in this field. To have the system to prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Engine so that the prompt table for this field is DEPT_POSITIONS. If you use partial position management, where you use positions for only a portion of your organization, you can use either the **Manager ID** number or the **Manager Position** number. When you select either field, the system disables the remaining field.
GL Account #-Payroll Expense (general ledger account number - payroll expense)	Enter the GL account to which payroll expenses for this department should be posted.
Budget Year End Date	If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.
Level	Select ***Department, Job Code, Line Item, Position Number,*** or ***None*** to define budgeting for this department.
EEO4 Function	Select the functional category, such as health or fire protection, that applies to this department. The option you select affects your EEO reporting.

See Also

PeopleTools PeopleBook: Application Designer, "Creating Record Definitions

PeopleSoft Human Resources PeopleBook: Manage Positions, "Maximizing Position Data"

PeopleSoft Payroll for North America PeopleBook

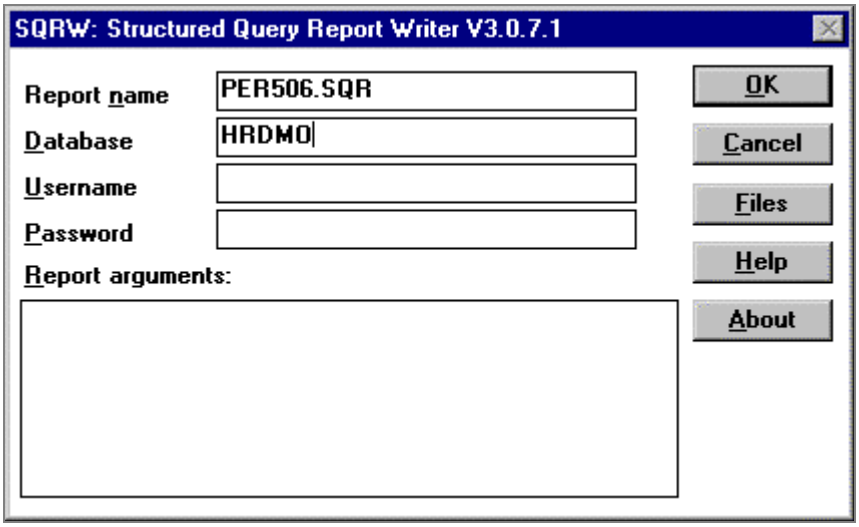
Running an SQR Audit to Cross-Check Departments

When you add new departments to the Department Table, also add them to your security tree so that they are a part of your security structure. After you build your security tree, you can run a SQR audit (PER506) to determine which department IDs are in the 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 can occur if you delete a department from the system and don't remove the node from your security tree.

The procedures for running SQRs vary with your application environment. If you aren't sure of your standard procedures, ask your system administrator. To give you an idea of how the procedure works, see the following steps.

To run an SQR from Windows 95:

1. Click the SQRW button.
2. At the Report name prompt, enter the SQR name *PER506.SQR*.



Structured Query Report Writer page

The SQR generates the audit.

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

Building Organization Charts

PeopleSoft Human Resources includes an Organization Charting Interface that enables you to produce detailed organization charts through seamless integration between your PeopleSoft Human Resources data and the Visio Organization Charting Wizard. Building organization charts is easy—all you do is choose to map your organization based on positions or on departments, using one of your PeopleSoft Human Resources Security or Department trees; and run the Organization Chart SQR from PeopleSoft Process Scheduler. Visio does the rest. Once you select formatting options using the Visio Organization Charting Wizard, creating detailed charts of only one department or your entire organization is as simple as pressing a button.

This section describes how to:

- Set up your Organization Charting Interface.
- Create organization charts.
- Review organization charts.

- Use the Visio Organization Charting Wizard.
- Build an organization chart from PeopleSoft Tree Manager.

Before You Begin

Unless otherwise indicated, you'll find the pages described in this section in Administer Workforce, Administer Workforce (GBL), Process and in PeopleTools, Tree Manager.

You can run the Organization Chart Interface process from the Administer Workforce global or local country menus, as well as from the Department Data page in PeopleSoft Tree Manager.

Note. Make sure that organization and employee data exists in PeopleSoft Human Resources before you start working with the Organization Charting Interface pages.

Two Ways to Create Organization Charts

To create organization charts that are based on your human resources data, you can take one of two approaches:

- Use the Organization Chart page on the Process menu in Administer Workforce.
- Run the Organization Charting Interface from the Department page in PeopleSoft Tree Manager.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

Page Used to Create an Organization Chart

Page Name	*Object Name*	*Navigation*	*Usage*
Organization Chart	ORGCHART_PNL	Administer Workforce, Administer Workforce (GBL), Process, Organization Chart Administer Workforce, Administer Workforce (USF), Process, Organization Chart	Create an organization chart based on PeopleSoft Human Resources system trees.

Setting Up Your Organization Charting Interface

This section walks you through using the Visio Organization Charting Wizard to create your organization charts. For complete information about Visio features, see your Visio documentation.

To set up your Organization Charting Interface:

1. Check your Visio settings.

   Before you use the Organization Charting Interface in PeopleSoft Human Resources, make sure that Visio is installed on your system.

   Visio is not delivered with PeopleSoft Human Resources; you must purchase and install Visio separately. For more information about installing Visio, see your Visio documentation.

2. Add the global environment variables.

   Add the following variables:

   VISIO=<your Visio path>

   TEMP=<temporary directory>

   For example, if you are using Windows 98, Visio is installed in a directory called APPS on the C: drive, and the temporary directory is called TEMP on your C: drive. Add the following 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 the following lines:

   VISIO=<Visio path>

   TEMP=<temporary directory>

3. Modify some settings on the PeopleSoft Human Resources Installation Table.

   Open the Installation Table – Third Party/System page.

   In the Third Party Settings group box, use the list of translate values to set the organization chart to *Visio.*

4. Save your changes.

See Also

"Setting Up PeopleSoft HRMS," Setting Up Implementation Defaults

Creating an Organization Chart

Access the Organization Chart page.



Organization Chart page

First, set up organization and employee data in PeopleSoft Human Resources, and then set up your Organization Charting Interface on the Third-Party/System page in the Installation component.

To build your chart using one of the PeopleSoft Human Resources system trees, you provide the system with department and/or tree information. Select a report type. Options are:

Department	Builds your chart based on a single department that you select.
Tree	Builds your tree based on one of your Human Resources system trees. Using this option, you can include multiple departments in your chart.

Note. You can build your organization chart from active department and position trees only. You must also have security access to the trees and departments that you want to include in your organization chart.

Building Your Chart Using Departments

If you select ***Department*** in the **Report Type** field, then the **SetID** and **Department** fields appear.

Department	Enter the department that you want to include in your organization chart from the list of department IDs in the setID. You build your organization chart one department at a time. (You create the department codes when you define departments in the Department Table.)
Run	Click **Run** if you're building your chart using the Department report type. PeopleSoft Process Scheduler runs the Organization Chart SQR.

Building Your Chart Using Trees

If you selected a report type of *Tree,* the SetID, Tree Name, Tree Node, and #Levels (number of levels) fields appear:

1. Select a setID from the list of values.

2. Select a tree name from the list of trees.

Selecting Tree Nodes and Levels to Include in Your Chart

The Tree Node and #Levels fields 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 begin the chart at tree level *5* and you leave #Levels at *3,* the organization chart includes levels 5 though 7 of your tree.

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.* Click the Run button to have PeopleSoft Process Scheduler run the Organization Chart SQR.

See Also

Maintaining Departments

Administering PeopleSoft Security

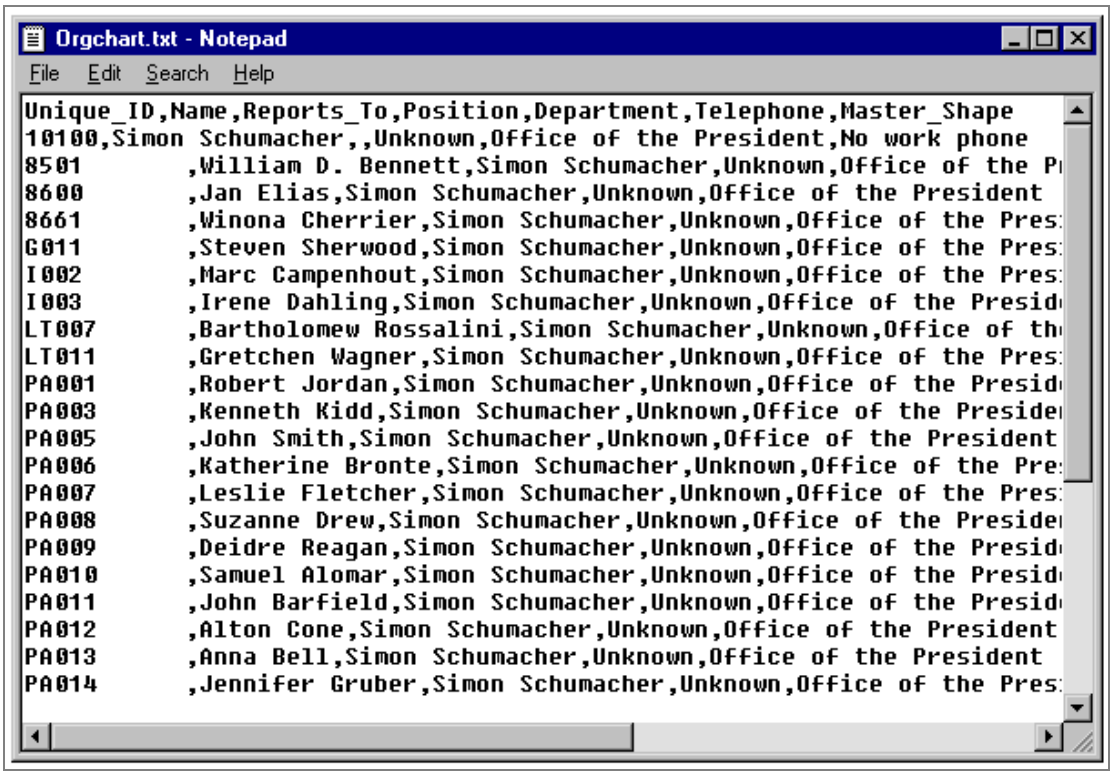
PeopleTools PeopleBook: Process Scheduler

Reviewing Your Organization Chart

When PeopleSoft Process Scheduler finishes running the Organization Chart SQR, it creates a flat file called ORGCHART.TXT. To review the results of your Organization Chart SQR process in the ORGCHART.TXT file, use a text editor to open and review the file. The Organization Charting Interface writes the file to your local TEMP directory. The file contains the following data:

- Unique ID.
- Name.
- Reports To.
- Position.
- Department.
- Telephone.

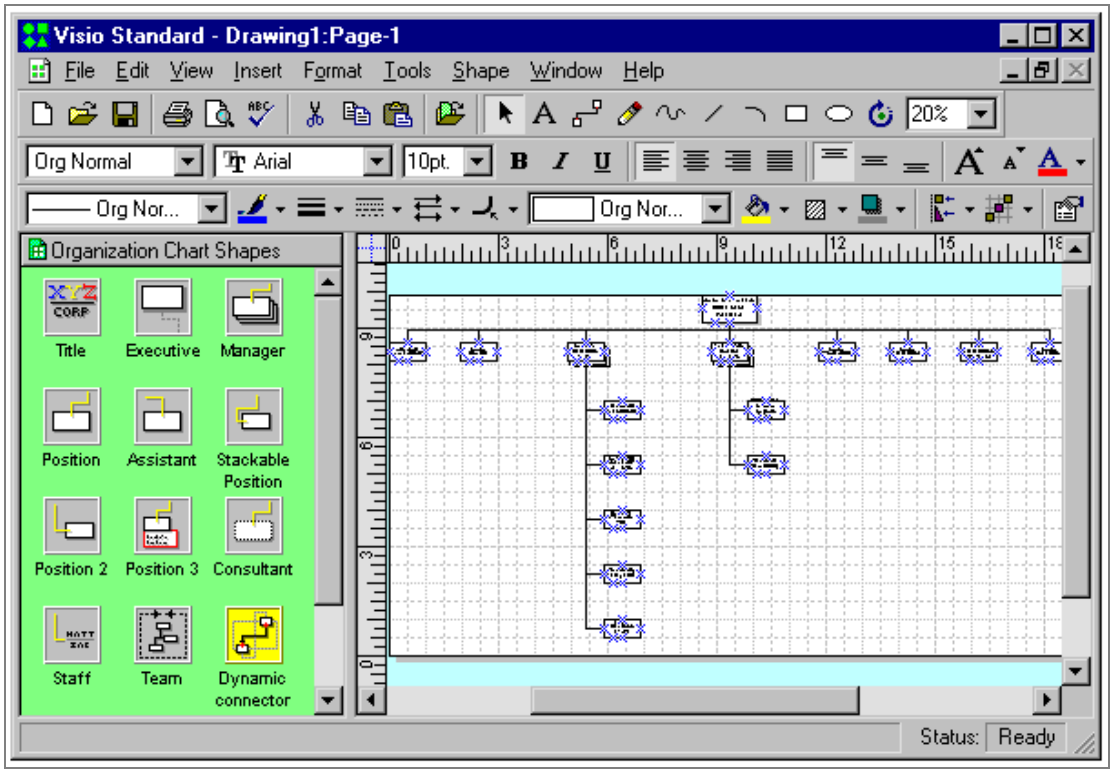
Following is an example of the ORCHART.TXT file:



Example of ORGCHART.TXT file

Using the Visio Organization Chart Wizard

When you use the Organization Chart page to create an organization chart, the Organization Charting Interface opens Visio. Visio draws your organization chart automatically. Following is an example of the Visio page that you see when your organization chart is complete:



Example of a department organization chart in Visio

While viewing this page in Visio, right-click in the top shape in the organization chart. A pop-up menu opens. Select Properties; the Custom Properties page appears. The custom properties are configured while the Visio Organization Chart Wizard is running. To review or modify your organization chart default settings, run the Organization Chart Wizard in Visio.

When you run 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 that is specified in your global environmental variables. When this occurs, go to Microsoft Windows and select Visio, Tools, Macro, Macros, Organization Chart Wizard, Run. When the Organization Chart Wizard runs, enter the path to the ORGCHART.TXT file in the Read Data From Existing File field (see the example below). Once you have entered this information, Visio creates your first organization chart.

Note. For more information about editing and printing your organization chart in Visio, see your Visio documentation.

Building an Organization Chart From Tree Manager

You can use the Organization Charting Interface option using PeopleSoft Tree Manager. The following section assumes that you have a working knowledge of PeopleSoft Tree Manager and the Department and Security trees in PeopleSoft Human Resources. Your organization chart can include only a single department if you use this option.

To build an organization chart using PeopleSoft Tree Manager:

1. Open the PeopleSoft Tree Manager, and select a PeopleSoft Human Resources tree.
2. Double-click a node, such as 10100 Office of the President.

   The Department Table for that node appears.
3. Click the Visio button to create an organization chart from the Department Table.

   The Enter SQR Settings dialog box appears.
4. Enter a run control ID.

   The Visio Organization Chart Wizard appears.
5. Create and display your organization chart.

See Also

Administering PeopleSoft Security

PeopleTools PeopleBook: Tree Manager

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, you define establishments that are consistent with the regulatory requirements of your business operations.

In PeopleSoft Human Resources, an establishment:

- Has an address.
- Is associated with a company.
- Is used for regulatory purposes.

An establishment isn't necessarily a single building or location; it could be an entire industrial or office complex, but it is usually a physical place for which information is reported as a consolidated unit.

Two examples of how establishments are used:

- Occupational Illness and Injury Record keeping (OSHA 200) and Equal Employment Opportunity/Affirmative Action reporting in the United States.
- Social Security and business statistical reporting in France.

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States" and "(FRA) Meeting Regulatory Requirements for France"

Pages Used to Define Establishments

Page Name	Object Name	Navigation	Usage
Establishment Address	ESTAB_TBL1_GBL	Define Business Rules, Manage Human Resources (GBL), Setup, Establishment, Establishment Address	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.
Phone Numbers	ESTAB_TBL2_GBL	• 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	Enter the establishment's telephone, fax machine, and other related numbers.

Alternate Navigations for 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

Alternate Navigations for Phone Numbers

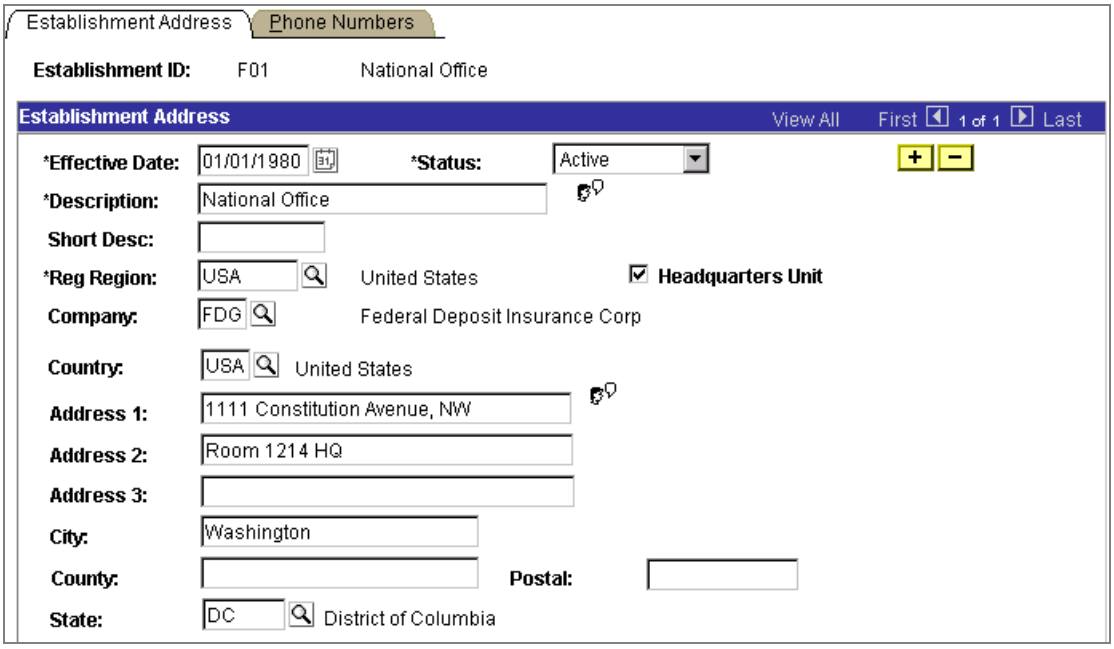
Define Business Rules, Manage Human Resources (USF), Setup, Establishment Table, Phone Numbers

Monitor Workplace, Report Regulations (US), Setup, Establishment Table, Phone Numbers

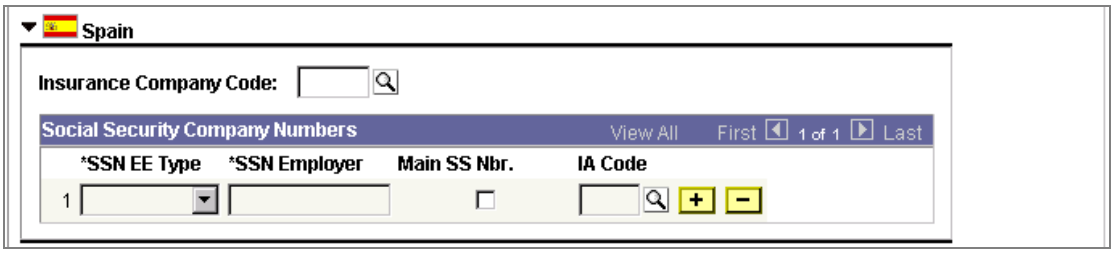
Monitor Workplace, Report Regulations (USF), Setup, Establishment Table, Phone Numbers

Creating an Information Profile for a Business Establishment

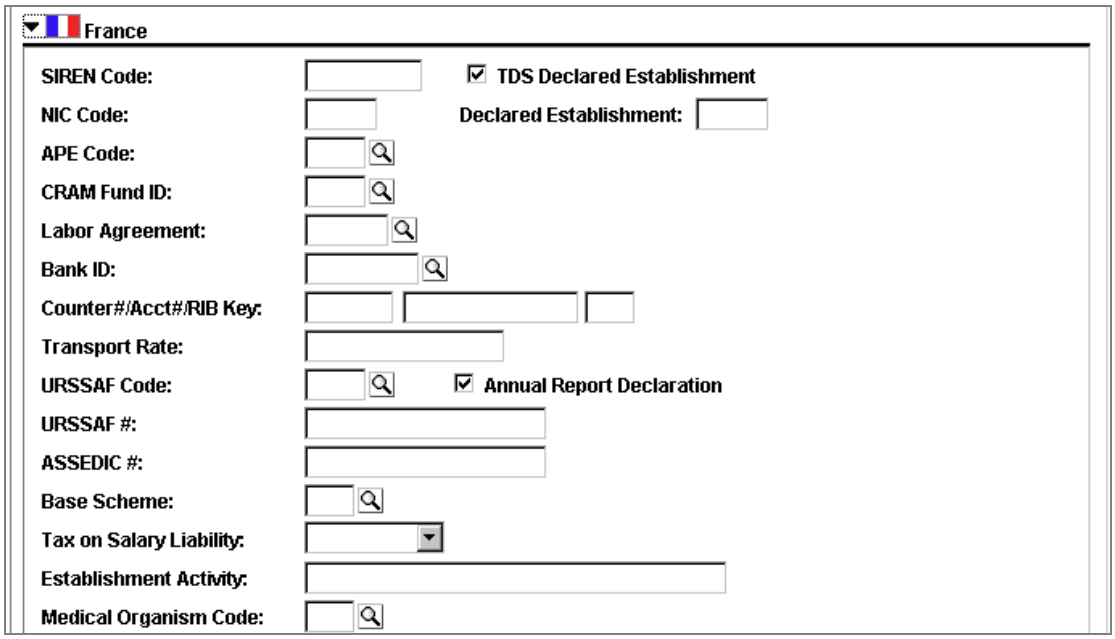
Access the Establishment Address page.



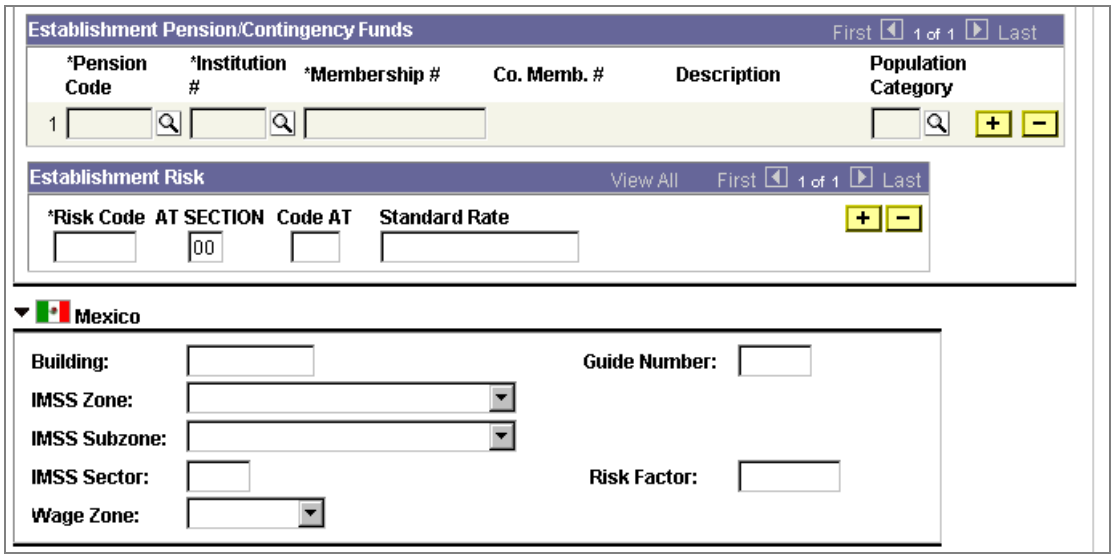
Establishment Address page (1 of 6)



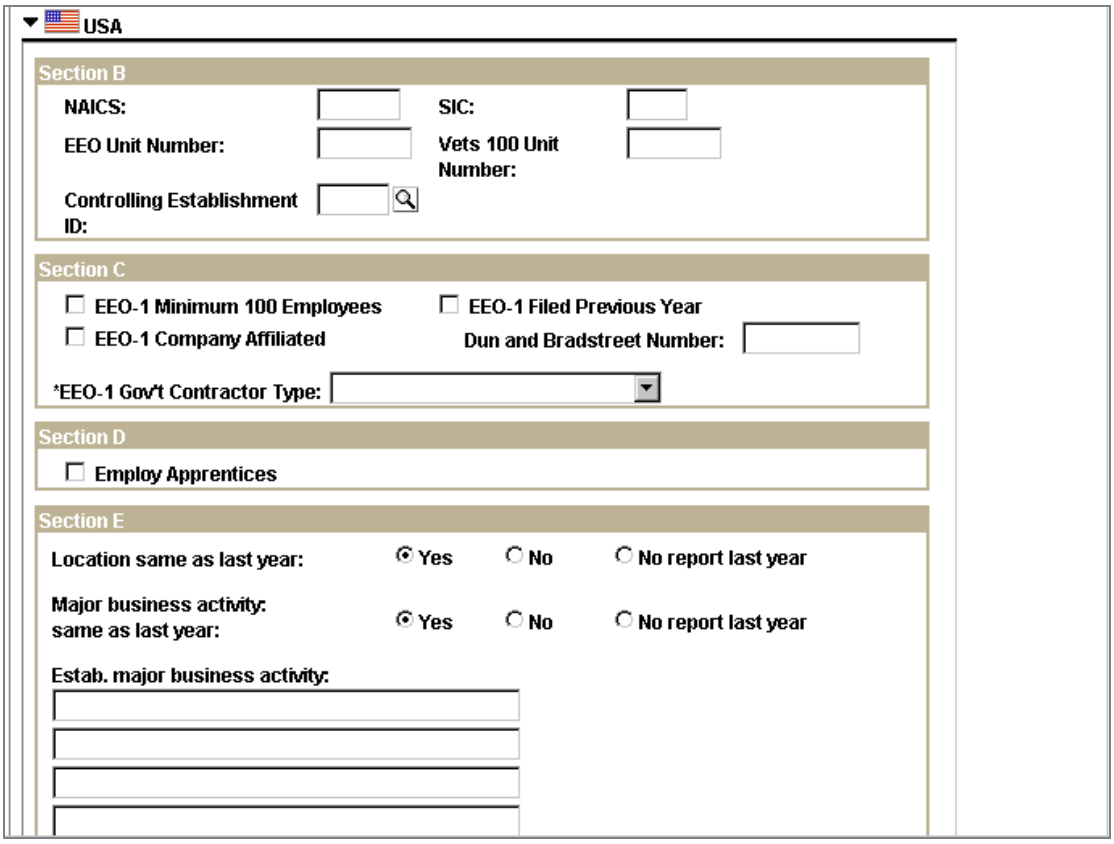
Establishment Address page (2 of 6)



Establishment Address page (3 of 6)



Establishment Address page (4 of 6)



Establishment Address page (5 of 6)



Establishment Address page (6 of 6)

Headquarters Unit Select if the establishment that you're defining is your headquarters. Designate at least one establishment in your company as the headquarters.

(ESP) Spain

Insurance Company Code Select the code of the insurance company that represents the establishment (work center) in work-related injuries. These codes are maintained on the (ESP) Insurance Company Tbl page.

SSN EE Type (social security number employer type) Select the SSN type—***Apprentice***, ***Regular***, or ***Training***—based on the type of contract you have with your employees.

SSN Employer	Enter the social security number as assigned by the Spanish government.
Main SS Nbr.	Select if the entry in the SSN Employer field is the main number for this establishment (work center). One work center can have more than one employer social security number.
IA Code (industry activity code)	Enter the IA code, which is maintained on the (ESP) Industry Activity Tbl page.

(FRA) France

NIC Code *(Numero Interne de Classement* code).	Enter the NIC code for the establishment. NIC numbers identify the entities that are inside the same enterprise. The English translation of *Numero Interne de Classement* is Internal Number of Filing.

Note. The SIRET number (*Systeme Informatique pour le Repertoire des Etablissements,* or Electronic List of Entities) is an identifying number that is given to a French business by the INSEE (*Institut National de la Statistique et des 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 and is used by the tax and social security authorities to identify a business enterprise and its entities.

CRAM Fund ID *(Caisse Regionale d'Assurance Maladie* fund ID)	Select a CRAM fund ID. CRAM is the regional social body that deals with the prevention of and compensation for industrial injuries. The CRAM office oversees the local CPAM *(Caisse Primaire d'Assurance Maladie)* offices that manage occupational health care coverage.
Counter#/Acct #/RIB Key (counter number/account number/RIB key)	Enter the **Counter#/Acct #/RIB Key** information.
Transport Rate	Enter the transport rate. The transport rate is a statutory deduction. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. The region uses this deduction to subsidize transportation and maintain and build roads. PeopleSoft Global Payroll uses the transport rate that you enter here.
URSSAF Code *(Union de Recouvrement de la Securite Social et des Allocations Familiales* code) and **URSSAF #** (URSSAF number)	Enter an URSSAF code and number. The URSSAF is responsible for ensuring payment of Social Security contributions by all French employers.

Base Scheme — Enter the Social Security code for DADS.

Tax on Salary Liability — Indicate if the tax on salary liability is complete, partial or if there is no liability to this tax.

Establishment Activity and **Medical Organism** — Select an establishment activity and medical organism. Used for Single Hiring Statement reporting.

Establishment Pension/Contingency Funds

Pension Code and **Institution #** (institution number) — Enter the pension code or the institution number of the pension companies used by this establishment.

Membership # — Enter the membership number that the pension company assigned to this establishment when it registered the establishment.

Establishment Risk

Risk Code — Enter the risk code. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

AT Section *(Section Accident du Travail* section) — System-displayed information that you need to identify the risk code by establishment. The English translation of *Section Accident du Travail* is Work Accident Section.

Standard Rate — Enter the standard rate information. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

(MEX) Mexico

Enter the Registros Patronal information required for social security and tax purposes.

Building — Enter the building for your company's address.

Guide Number — Enter the number provided by the IMSS authority. The guide number is used as a reference when you submit reports to the IMSS.

IMSS Zone, IMSS Subzone, and **IMSS Sector** — Select the IMSS zone, subzone, and sector for your company's location.

The IMSS zone, IMSS subzone and IMSS sector indicate the office where you can make your payments.

Risk Factor — Enter the risk factor that's used for IMSS tax calculation.

Wage Zone — Select the economic zone for your company's location. Wage zones dictate minimum wages. Valid values are ***A Zone, B Zone,*** and ***C Zone.***

USA

Section B

NAICS (North American Industrial Classification System), **Controlling Establishment ID**, **SIC** (Standard Industrial Classification), and **Vets 100 Unit Number**	Enter the NAICS code, controlling establishment ID, SIC code, and Vets 100 unit number, if any apply to this establishment.

Section C

EEO-1 Minimum 100 Employees, EEO-1 Company Affiliated	Select if they apply to this establishment.
EEO-1 Filed Previous Year	Selected by default. If you didn't file an EEO-1 report for this establishment last year, clear this check box.

Section E

Location same as last year	Select **Yes** or **No** to indicate whether your location is the same as last year, or select **No Report** if you made no report last year.
Major business activity same as last year	Select **Yes** or **No** to indicate whether your business activity is the same as last year, or select **No Report** if you made no report last year.
Estab. major business activity (establishment's major business activity)	Enter a description of the establishment's major business activity. The description is limited to the four lines that appear on the page.

Locations

Location SetID, **Location Code**, and **Description**	Enter one or more location codes to associate with this establishment.

See Also

"Setting Up Local Country Functionality," (ESP) Setting Up Spanish Control Tables

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States" and "(FRA) Meeting Regulatory Requirements for France"

CHAPTER 10

Setting Up Payroll Tax Tables

This chapter provides an overview of defining payroll taxes and discusses how to:

- View federal and state tax information.
- Update local tax information.
- View the state tax reciprocity withholding liability rules.
- View the local tax reciprocity rules.
- Establish reciprocal agreements between work localities.
- Update the Taxable Gross Definition Table.
- Enter a state's marital status codes.
- (CAN) View Canadian tax information.
- Tax tables that you maintain.
- Establish company state taxes.
- Define an entry for the Local Tax Table.
- Establish tax types for accounts payable integration.
- Define tax locations.
- (E&G) Establish 1042 processing for non-resident aliens.
- Establish UI report codes.
- Establish U.S. standard occupational classifications for Alaska.
- Specify voluntary disability insurance plan location and contact information.
- Specify parameters for yearly and quarterly tax reporting.
- (CAN) Define Canadian tax information.
- (CAN) Define Canadian WCB assessment reporting.

Note. This information provided in this chapter is applicable to the Payroll for North American and Payroll Interface products.

Although PeopleSoft Payroll Interface does not calculate taxes, the Payroll for North America tax tables store tax information, such as state and locality codes, which can be used by Payroll Interface. This chapter examines the tax tables that PeopleSoft provides and maintains and those that your company is responsible for initializing and updating.

If you are using only Payroll for North America

If you use only PeopleSoft Payroll for North America, then this entire chapter is relevant.

If you are using only Payroll Interface

If you do not plan on mapping and exporting employee-level tax information, you can ignore this chapter.

The provided tax tables are designed to support PeopleSoft Payroll for North America. The logical representation of your payroll system's tax data may not mirror the way PeopleSoft uses them. You can create your own views and documentation to extract employee-level tax information that matches your payroll system's requirements.

If you use just Payroll Interface, then you can skip the first part of the chapter and proceed directly to Tax Tables That You Maintain. You do not need to apply tax updates. Remember that taxes are calculated in your payroll system, not by Payroll Interface. However, read this chapter to map and export employee-level tax codes to your payroll system from PeopleSoft.

When you are analyzing the mapping of employee-level tax information, remember that you generally want to export a code and possibly a corresponding numeric field (percent or flat amount). How you set it up and map it is up to you. Be sure to define the relationship between employee-level tax data in PeopleSoft and how the data needs to be imported into your payroll system. We deliver a FED_ST_TAX_VW to export the more common employee-level tax data.

If you are using both Payroll for North America and Payroll Interface

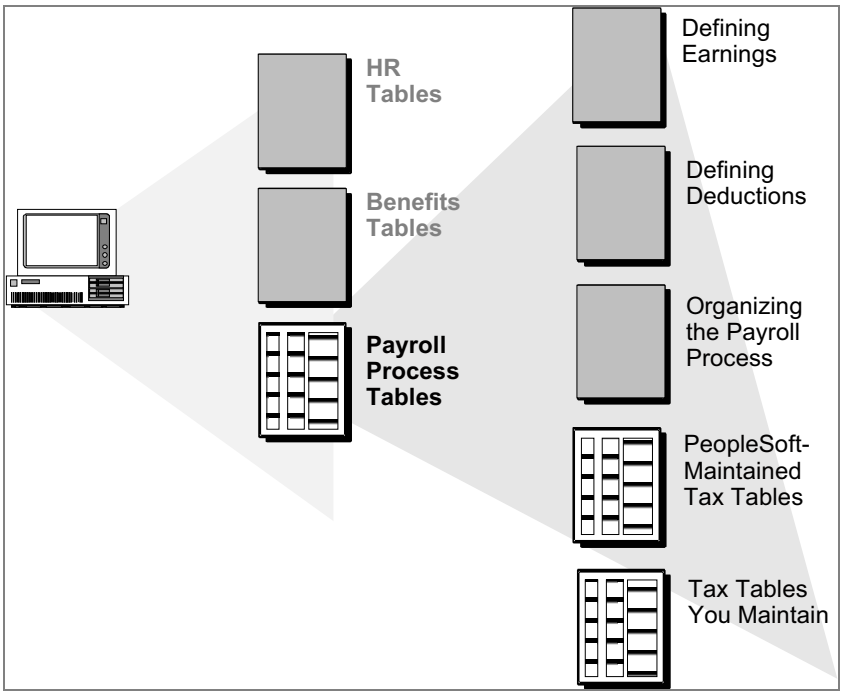
If you use both PeopleSoft Payroll for North America and Payroll Interface, then this entire chapter is relevant.

See Also

Tax Tables That You Maintain

Understanding Payroll Tax Tables

The PeopleSoft Payroll tax tables store tax information that the system requires to calculate and report taxes. PeopleSoft provides and maintains most of the payroll tax tables.



Working with Payroll Tax tables

These are the PeopleSoft-maintained tables for U.S. companies:

- Federal/State Tax and Local Tax Tables, which contain rates and other constants used in the calculation of most forms of taxes for U.S. federal, state, and local taxing entities.
- State and Local Tax Reciprocity Tables, which define reciprocal taxing agreements between states and localities, and other rules for determining tax liabilities for multiple jurisdictions.
- Taxable Gross Definition Table, which identifies differences between states or localities and the federal government in the definition of taxable wages.
- SWT Marital Status Table, which defines the valid marital status codes for each state.

This is the PeopleSoft-maintained table for Canadian companies:

- Canadian Tax Tables, which contain rates and other constants used in the calculation of all forms of federal, provincial, and Quebec taxes.

PeopleSoft Payroll for North America delivers tax data for all federal and state or provincial taxing entities and almost all localities. Should you need a locality that PeopleSoft does not yet support, you can add and maintain entries using the tax pages. If you need to make a change or addition to the standard tax information delivered with the system, you are responsible for maintaining the change until it is incorporated into PeopleSoft-maintained tax tables. After you notify us of the missing locality, PeopleSoft will add it to our standard system and maintain it for you in subsequent releases.

You are responsible for completing the tax tables that contain data specific to your company.

U.S. companies must define and maintain the following tables:

- Tax Location Table, which contains the locations for which you process payroll and taxes.
- Company State Tax and Company Local Tax tables, which store tax identification numbers, unemployment and disability experience rates, and general ledger codes for the states and localities for which your company collects and pays taxes.
- Tax Reporting Parameters Table, which controls the execution of many of your quarterly and annual tax reports and specifies data needed for magnetic media filing.

Canadian companies must define and maintain the following tables:

- The Canadian Wage Loss Plan Table, which identifies your company's valid wage loss replacement plans and general ledger account numbers.
- The Canadian Company Tax Table, which defines the Prescribed Interest rate, Provincial Premium Tax rate, and Health Insurance rate override.
- Canadian Tax Reporting Parameters Table, which controls the execution of many quarterly and annual tax reports and specifies data needed for magnetic media filing.

Note. The pages for Federal/State Tax, Taxable Gross Definition, and Canadian Tax tables reference more than one table.

See Also

PeopleSoft Payroll for North America PeopleBook, "Accessing Year-End Processing Instructions"

Viewing Federal and State Tax Information

In this section, we provide an overview of viewing federal and state tax information and discuss how to:

- View standard deductions, allowance amounts, and supplemental taxes.
- View special tax amounts.
- View wage bracket rates information.
- View additional wage rates information.

Understanding Federal and State Tax Information

Use the Federal/State Tax Table pages to view the tax data PeopleSoft Payroll uses to calculate U.S. federal, state, and certain local taxes. These pages supply the following information:

- Identify the general type of withholding tax calculation employed by each jurisdiction and provide all the constants needed by the calculation routines for income tax withholding and unemployment and disability taxes.
- Contain the wage bracket rate data used by the taxing authorities for implementing graduated taxes.

Special State Codes for Localities Using Graduated Tax Tables

In addition to the rules for state withholding, the rates for calculating federal withholding, FICA, and federal unemployment are defined on this table, primarily because the method of calculation is similar. Localities that use graduated tax tables are also included. These entries are identified by special state codes such as Z1 and Z2. Here are some of these special codes:

Code	*Description*
$E	Earned income credit
$U	U.S. federal tax
Z1	New York City local tax
Z2	Yonkers local tax
ZA	Maryland 3.01% local tax
ZB	MD resident works in DE

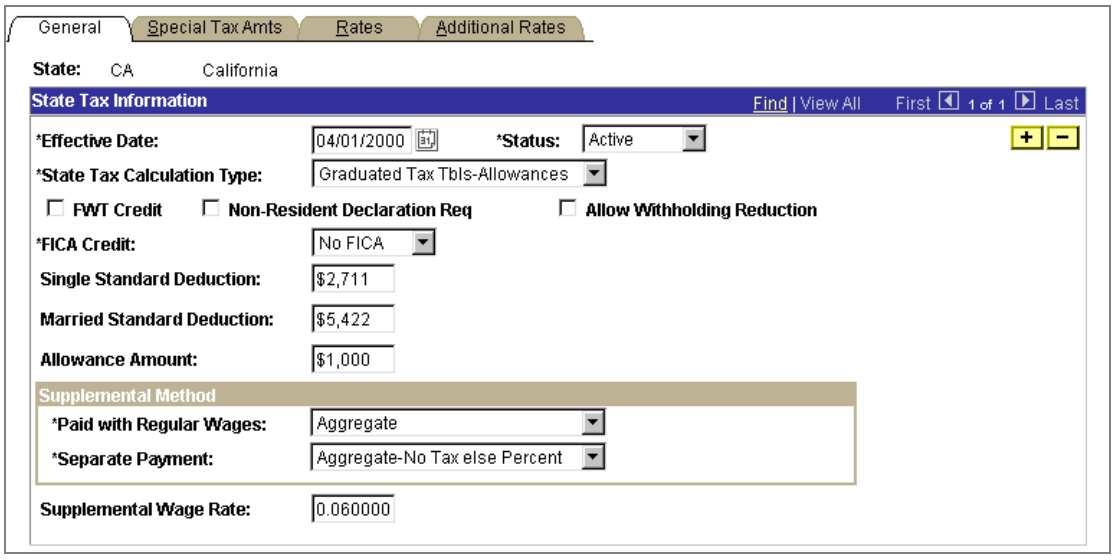
Pages Used to View Federal and State Tax Information

Page Name	*Object Name*	*Navigation*	*Usage*
Federal/State Tax Table - General	STATE_TAX_TABLE1	Define Business Rules, Define Payroll Taxes, Setup, Federal/State Tax Table Define Business Rules, Define Payroll Taxes (USF), Setup, Federal/State Tax Table	Display standard deductions, allowance amounts, and supplemental rates.
Federal/State Tax Table - Special Tax Amounts	STATE_TAX_TABLE2	Define Business Rules, Define Payroll Taxes, Setup, Federal/State Tax Table Define Business Rules, Define Payroll Taxes (USF), Setup, Federal/State Tax Table	Display information needed for tax calculations. The page for the Federal Tax Table differs from the one for specific states.

Page Name	Object Name	Navigation	Usage
Federal/State Tax Table - Rates	STATE_TAX_TABLE3	Define Business Rules, Define Payroll Taxes, Setup, Federal/State Tax Table Define Business Rules, Define Payroll Taxes (USF), Setup, Federal/State Tax Table	Display wage bracket information.
Federal/State Tax Table - Additional Rates	STATE_TAX_TABLE4	Define Business Rules, Define Payroll Taxes, Setup, Federal/State Tax Table Define Business Rules, Define Payroll Taxes (USF), Setup, Federal/State Tax Table	Display wage limits for unemployment and disability taxes.

Viewing Standard Deductions, Allowance Amounts, and Supplemental Taxes

Access the Federal/State Tax Table - General page.



Federal/State Tax Table - General page

Note. You shouldn't need to modify this table, but if you must, you can make changes if you have the appropriate security authorization. This applies to all pages in this component.

State Tax Calculation Type	Indicates the type of tax calculation required by the state.
FWT Credit	This check box indicates whether credit is given for FWT during calculation of state income tax withholding.
Non-Resident Declaration Required	This check box indicates whether the state requires a Non-Resident Declaration for non-resident employees.
Allow Withholding Reduction	This check box indicates whether the state allows a reduction amount to be computed in the state withholding calculation. Currently, this only applies to Connecticut.
FICA Credit	This check box indicates whether credit is given for FICA during calculation of state income tax withholding.

Supplemental Method

Paid With Regular Wages	PeopleSoft delivers the required selection: ***Aggregate – No Annualize, Aggregate, Aggregate-No Tax else Percent, Non-Resident Supplemental, Not Applicable, Percent of Taxable Gross, Special Table with Exemptions,*** and ***Special Table.***
Separate Payment	PeopleSoft delivers the required selection: ***Aggregate – No Annualize, Aggregate, Aggregate-No Tax else Percent, Non-Resident Supplemental, Not Applicable, Percent of Taxable Gross, Special Table with Exemptions,*** and ***Special Table.***

Calculating Tax on Supplemental Wages

PeopleSoft Payroll tax processing supports the various tax calculation methods required by some states for supplemental earnings, including the use of aggregate tax methods.

The methods used for calculating withholding tax on supplemental payments may differ depending on the following criteria:

- The employee receives a supplemental payment paid with regular wages.
- The employee receives a supplemental payment as a separate payment.

Note. PeopleSoft uses the term normal wages to mean the employee's pay from regular and other earnings codes taxed using the annualized tax method.

The Federal/State Tax Table specifies which method of supplemental withholding tax calculation the system uses in each of these situations:

Aggregate – No Annualize	Normal wages are annualized, but supplemental wages are not annualized, as follows: • Annualize the employee's normal wages and compute tax on this amount.

- Annualize normal wages, add in the supplemental wages, and compute tax on the total.
- Subtract the difference in the tax amounts. The remainder is the withholding on the supplemental wages.

This method is used only for supplemental wages paid separately from normal wages.

Example

A Delaware employee, single with one allowance, earning $500 per week, is paid a $5000 bonus as a separate check.

Without Bonus		With Bonus
$26,000.00	Annualize Gross Wages	$31,000.00
1,104.55	Annual Delaware Tax	1,426.15
	Tax on Wages w/o Bonus	(1,104.55)
	Tax to Withhold on Bonus	321.60

Aggregate For supplemental wages paid with normal wages, calculate withholding (using the annualized method) as if the aggregate of supplemental and normal wages were a single wage payment for the normal payroll period.

Example

A Maine employee, single with one allowance, is paid a $1000 bonus on the same paycheck as his normal weekly earnings of $500:

Normal Wages	$500.00
Supplemental Wages	1,000.00
Total Wages	1,500.00
Annualized (x52)	$78,000.00
Annual Maine Tax	5,720.75
Tax to Withhold (/52)	110.01

For supplemental wages paid separately from normal wages, calculate withholding by aggregating supplemental wages with normal wages from the last preceding on-cycle confirmed payroll in the same calendar year. Using the annualized method, compute the tax

on the combined total. Subtract the annualized tax on the normal wages. The deannualized remainder is the withholding on the supplemental wages.

Example

A Maine employee, single with one allowance, is paid a $1000 bonus as a separate check. The employee's last previous on-cycle confirmed paycheck in the current year was for normal weekly earnings of $500:

Normal Wage		Reg + Bonus
$26,000.00	Annualize Gross Wages	$78,000.00
1,300.75	Annual Tax	5,720.75
	Annualized Tax on Normal Wages	(1,300.75)
	Remainder	4,420.00
	Tax to Withhold on Bonus (/52)	85.00

Aggregate – No Tax else Percent

When supplemental wages are paid separately from normal wages, withholding depends on whether tax was withheld on the employee's last previous on-cycle confirmed payment of normal wages in the same pay group in the same calendar year.

If no tax was withheld on the last previous on-cycle confirmed payment of normal wages, calculate tax on supplemental wages using the Aggregate Method described previously for supplemental wages paid separately.

If tax was withheld on the last previous on-cycle confirmed payment of normal wages, calculate tax using a flat percent rate as specified by the state, without regard for marital status or allowances.

Example

A Connecticut employee, single with one allowance, is paid a $1000 bonus as a separate check. The employee's last previous on-cycle normal paycheck in the current year was for normal weekly earnings of $500, from which $10.92 Connecticut tax was withheld. Using the flat rate of 4.5 percent specified by Connecticut, calculate the Connecticut tax to be withheld on the bonus:

4.5% x $1000 = $45

Percent of Taxable Gross	Calculate the tax to be withheld on supplemental wages by using the special flat rate specified by the state, without regard for marital status or allowances. For some states, this method uses a Percent of Federal Tax Withheld instead of a Percent of Taxable Gross. This method may apply both to supplemental wages paid with normal wages and to supplemental wages paid separately.

Examples

An employee subject to Indiana withholding is to be paid a $4000 bonus. Using the flat rate of 3.4 percent specified by Indiana for supplemental wages, calculate the Indiana tax to be withheld on the bonus:

3.4% x $4000 = $136

As an example of a calculation using a Percent of Federal Tax Withheld instead of a Percent of Taxable Gross, an Arizona employee electing an Arizona withholding rate of 32 percent is paid a $3000 bonus on which $600 Federal tax is withheld. Calculate the Arizona tax to be withheld:

32% x $600 = $192

Non-resident Supplemental	When supplemental wages are paid separately from normal wages to a non-resident employee, calculate tax using a flat percent rate specified for non-residents, without regard for marital status or allowances.

Example

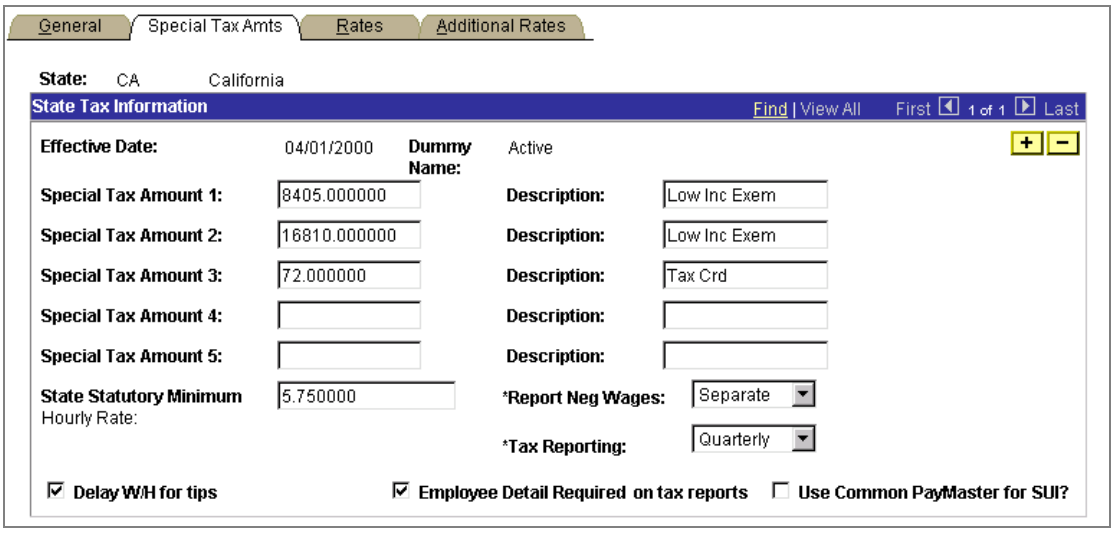
A non-resident of Yonkers employed in Yonkers and subject to Yonkers tax is to be paid a $2000 bonus as a separate payment. Using the flat rate of .5 percent specified by Yonkers for non-residents, calculate the Yonkers tax to be withheld on the bonus:

0.5% x $2000 = $10

Special Table with Exemptions	Louisiana only. The system uses the annual rate computed from the job record.
Special Table	For Georgia, West Virginia, and Wisconsin only. The system uses the annual rate computed from the job record.

Viewing Special Tax Amounts

Access the Federal/State Tax Table - Special Tax Amounts page.



Federal/State Tax Table - Special Tax Amounts page

Special Tax Amount Enter a tax amount.

State Statutory Minimum Hourly Rate The system uses this field to calculate tip credit to pay overtime for tipped employees. The minimum hourly rate required by that state appears here.

Report Neg Wages Options are ***include*** or ***separate.***

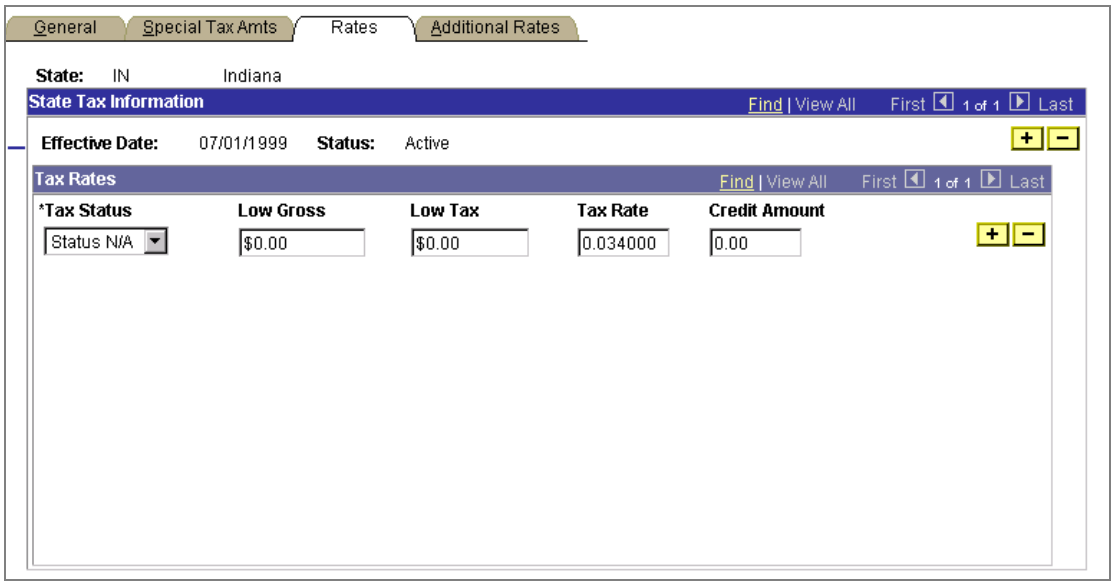
State Tips W/H Threshold This field displays the monthly threshold amount that the state allows employers to delay withholding on tip income. For states that allow you to delay withholding on tips, you can specify by Pay Group.

Tax Reporting Options include ***Annual, Monthly,*** or ***Quarterly.***

Employee Detail Required On Tax Reports This field is informational only and indicates whether a state requires the quarterly reporting of individual employee wage data. All states currently require such reporting.

Viewing Wage Bracket Rate Information

Access the Federal/State Tax Table - Rates page.



Federal/State Tax Table - Rates page

Tax Status The appropriate Federal/State tax status (***Married, Single,*** and so on.).

Low Gross The minimum gross for the bracket.

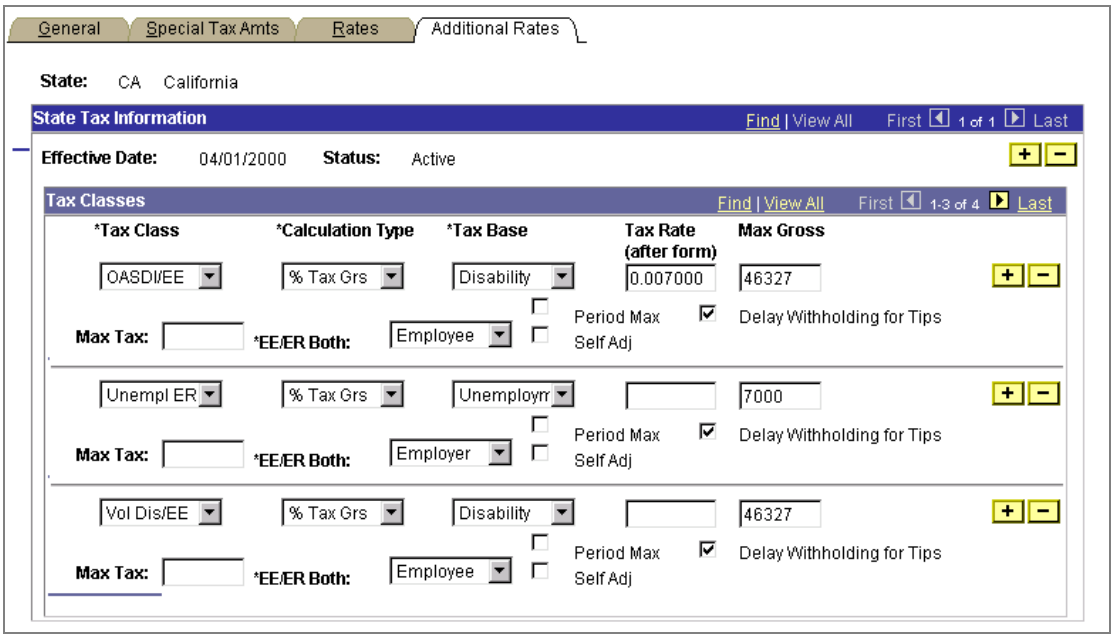
Low Tax The tax to be withheld at the corresponding minimum gross.

Tax Rate The rate to be applied until the next bracket is reached.

Credit Amount Not currently used by PeopleSoft Payroll for North America.

Viewing Additional Wage Rates Information

Access the Federal/State Tax Table - Additional Rates page.



Federal/State Tax Table - Additional Rates page

Tax Class — Tax classes identify different taxes that share certain characteristics.

Calculation Type — Options are ***% Tax Grs, %ER Wage,*** and ***N/A.***

Tax Base — Options are ***Disability, Unemploymt,*** and ***Withholdng.***

Tax Rate — The tax rate for employer unemployment or disability contributions is blank on this page. The rate used during payroll calculations comes from the Company State Tax Table.

Max Gross — If a tax applies only to the first portion of an employee's annual wages, such as employer unemployment taxes, that limit amount appears in this field. An entry of all ***9s,*** as with Medicare taxes, indicates a tax without limit.

Period Max — If selected, this option indicates that the tax is calculated for a period other than annual. Two examples of this are SDI in New York and Hawaii, both of which have weekly maximums.

Self Adj. (self-adjusting) — This check box indicates that a tax is self-adjusting in the system. Each time payroll is processed for an employee, the system makes any necessary adjustment to ensure that the employee's YTD tax amount is the correct percentage of the YTD taxable gross amount. Examples include social security, Medicare, and unemployment taxes. Withholding is never self-adjusting.

Delay Withholding for Tips — Select this option if you want to delay withholding for tips.

Max Tax (maximum tax) — If there is an annual limit on a particular type of tax, such as Pennsylvania's occupational privilege taxes, enter that limit amount here.

EE/ER Both — This field indicates whether a tax is paid by the employee, paid by the employer, or paid in equal matching amounts by both.

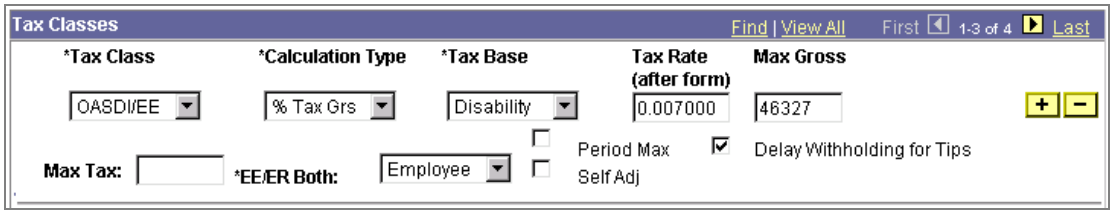
Pennsylvania Limit on Occupational Privilege Tax

For Pennsylvania employees, the Tax Class Occ Priv represents Occupational Privilege Tax (OPT). The state of Pennsylvania requires an employee to take this tax class only one time annually. If an employee moves from one locality to another midyear, the employee should not be taxed an additional OPT tax amount in the new locality until the next year. To keep track of how much Pennsylvania OPT tax an employee has paid, there exists a state level Pennsylvania OPT Memo tax record. The sole purpose of this tax record is to keep track of how much Pennsylvania tax an employee has paid *regardless* of the Pennsylvania locality. During the OPT tax calculation, a check is made against this state Memo tax balance before the local OPT tax is computed.

Note. Pennsylvania's OPT is withheld as an annual fixed amount. When you hire an employee who has already paid OPT for the current tax year, you should adjust the employee's tax balance for the tax year. This prevents the system from withholding OPT from that employee's pay twice in one year. **Note.** The Payroll calculation process determines the Pennsylvania OPT limit by Employee ID. To adjust an employee's memo balance for PA OPT, select **Compensate Employees, Maintain Payroll Data US, Use, Adjust Tax Balance.**

Voluntary Disability Plans

Of the states that provide disability insurance plans (currently California, Hawaii, New Jersey, New York, Rhode Island, plus Puerto Rico) all but Rhode Island allow employers to provide voluntary disability plans in place of the state plan. PeopleSoft maintains the Tax Class rows on the Federal/State Tax Table 4 page for the Employer and Employee paid tax for voluntary disability plans for each of these states.



Federal/State Tax Table, Tax Class Row for a Voluntary Disability Plan - Additional Rates page

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Note. If you implement a voluntary disability plan for California, Hawaii, New Jersey, New York, or Puerto Rico, you must set up the appropriate tax rates on the Company State Tax Table and the VDI Administrator Table.

See Also

PeopleSoft Payroll for North America PeopleBook, "Maintaining Payroll Data"

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Employee Payroll Processing Data

PeopleSoft Payroll for North America PeopleBook, "Adjusting Employee Balances," Adjusting Tax Balances

Defining States Where You Collect or Pay Taxes

Updating Local Tax Information

In this section, we provide an overview of locality codes and discuss how to:

- View information about the geographic area associated with locality codes.
- View the method used to calculate local withholding rates.
- Enter a locality's tax reporting requirements.

Understanding Locality Codes

The Local Tax Table pages display information used when the system calculates local withholding tax. In this table, each locality is assigned a code of up to ten characters. Typically this is how these codes are assigned:

- For cities: a five-character Federal Information Processing Standards (FIPS) code.
- For counties: a three-digit county number.
- For Ohio school districts: a four-digit district number.

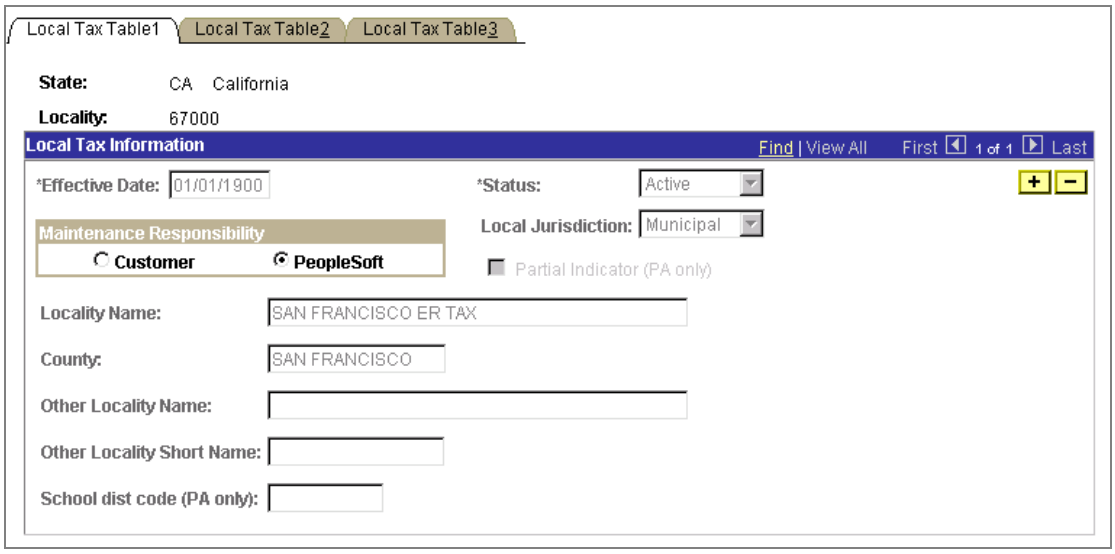
Pages Used to Update Local Tax Information

Page Name	*Object Name*	*Navigation*	*Usage*
Local Tax Table 1	LOCAL_TAX_TABLE1	Define Business Rules, Define Payroll Taxes, Setup, Local Tax Table, Local Tax Table 1 Define Business Rules, Define Payroll Taxes (USF), Setup, Local Tax Table, Local Tax Table 1	View information about the geographic area associated with a locality code.

Page Name	Object Name	Navigation	Usage
Local Tax Table 2	LOCAL_TAX_TABLE2	Define Business Rules, Define Payroll Taxes, Setup, Local Tax Table, Local Tax Table 2 Define Business Rules, Define Payroll Taxes (USF), Setup, Local Tax Table, Local Tax Table 2	Display the method used to calculate local withholding taxes, tax rates, and other constants.
Local Tax Table 3	LOCAL_TAX_TABLE3	Define Business Rules, Define Payroll Taxes, Setup, Local Tax Table, Local Tax Table 3 Define Business Rules, Define Payroll Taxes (USF), Setup, Local Tax Table, Local Tax Table 3	Enter data on the locality's tax reporting requirements.

Viewing Geographic Area Information Associated With a Locality Code

Access the Local Tax Table 1 page.



Local Tax Table 1 page

Maintenance Responsibility All entries that we supply are marked as the maintenance responsibility of PeopleSoft. However, if you add a locality to this table, the system marks it as *your* maintenance responsibility.

Local Jurisdiction	***Municipal*** indicates when the locality represents a municipality, ***School*** for a school district, ***State*** or ***County*** when those terms apply, and ***Combined*** for a combination of the two.
Partial District Indicator (PA Only)	This check box is selected for any Pennsylvania Locality where a single school district applies to multiple municipalities.
Locality Name	The municipality name from the register (except for school district entries, which are school district name). Combined jurisdictions have the appendage M+SD.
Other Locality Name	Combined entries display the school district name.
School District Code (PA Only)	For Pennsylvanian localities, the appropriate school district code appears here.

Pennsylvania Localities

The State of Pennsylvania provides a registry of tax rates for all cities, counties, political subdivisions, school districts, and so on located in Pennsylvania. For each municipality and overlying school district, the registry lists effective tax rates for both Earned Income Tax (EIT) and Occupational Privilege Tax (OPT) for residents and, where applicable, non-residents.

For each municipality and overlying school district, PeopleSoft delivers the following locality types:

- For Combined Earned Income, Municipality and School District Tax, the locality is identified by the letter “I” for income and the six-character locality code from the Pennsylvania Register, followed by the letter “C” for combined. For example:

  I123456C

- For Earned Income Municipality Tax, the locality is identified by the letter “I” for income and the six-character locality code from the Pennsylvania Register, followed by the letter “M” for municipal. For example:

  I123456M

- For Earned Income School District Tax, the locality is identified by the letter “I” for income and the six-character locality code from the Pennsylvania Register, followed by the letter “S” for school district. For example:

  I123456S

- For Combined Occupational Privilege Municipality and School District Tax, the locality is identified by the letter “O” for occupational privilege and the six-character locality code from the Pennsylvania Register, followed by the letter “C” for combined. For example:

  O123456C

- For Occupational Privilege Municipality Tax, the locality is identified by the letter "O" for occupational privilege and the six-character locality code from the Pennsylvania Register, followed by the letter "M" for municipal. For example:

  O123456M

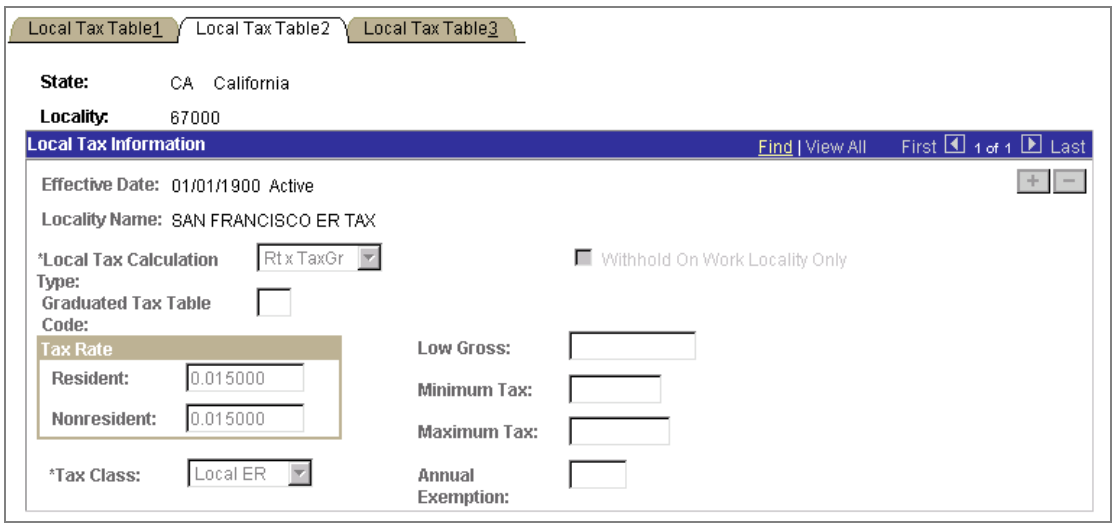
- For Occupational Privilege School District Tax, the locality is identified by the letter "O" for occupational privilege and the six-character locality code from the Pennsylvania Register, followed by the letter "S" for school district. For example:

  O123456S

Note. Each of these locality codes may have a numerical sequence added on to it when a school district applies to more than one municipality. For example: I123456C**1**, I123456C**2**, I123456M**1**, I123456M**2**, and so on.

Viewing the Method to Calculate Local Withholding Taxes

Access the Local Tax Table 2 page.



Local Tax Table 2 page

Withhold On Work Locality Only — When this check box is selected for a locality, only wages earned in that locality are considered taxable for resident taxes. If the employee does not work in the locality, then no resident tax is taken.

Graduated Tax Table Code — This option takes effect if the locality requires that tax tables be referenced during calculation, as do New York City, Yonkers, and Maryland counties. In this case, the graduated tax table code entered here links the record to the appropriate entry in the PeopleSoft Federal/State Tax Table where tax rates are stored.

Tax Rate

Resident This field displays the tax rate for residents of the locality.

Nonresident This field displays the tax rate for nonresidents in the locality.

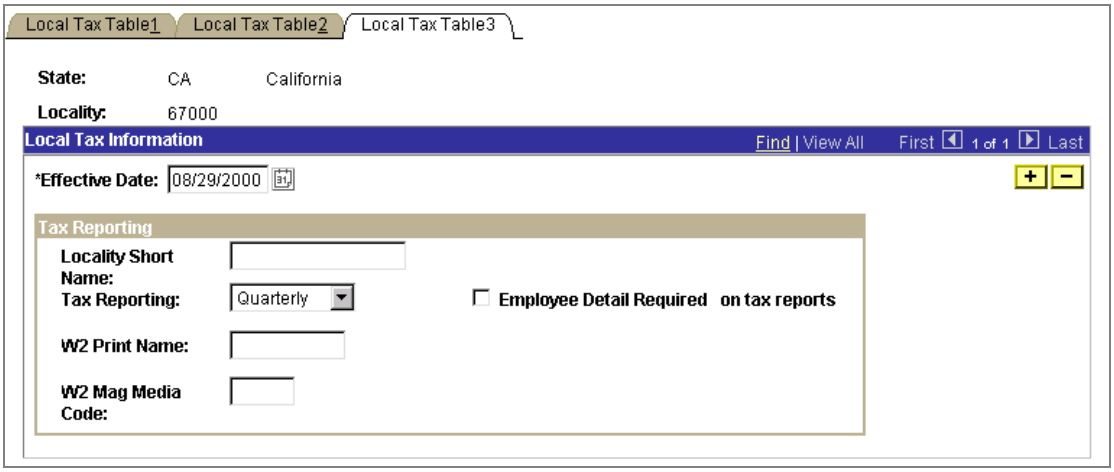
Adding Tax Localities

For each locality PeopleSoft supports, we maintain the entries for that locality in the following tables:

- Local Tax Table.
- Local Tax Reciprocity Table (if applicable).
- Taxable Gross Definition Table (GTL, 401k, and 125 only) (if applicable).

Entering a Locality's Tax Reporting Requirements

Access the Local Tax Table 3 page.



Local Tax Table 3 page

Tax Reporting Displays the interval required by the locality for tax reporting, ***Monthly, Quarterly,*** or ***Annual.***

Important! If you add a locality, you are responsible for maintaining the entries on these tables for the new locality until PeopleSoft incorporates it into a tax update. Contact your Global Support Center if you discover any localities not listed or any errors so we can include the addition or correction in the next PeopleSoft Payroll Tax Update.

See Also

PeopleSoft Payroll for North America PeopleBook, "Accessing Year-End Processing Instructions"

Viewing the State Tax Reciprocity Withholding Liability Rules

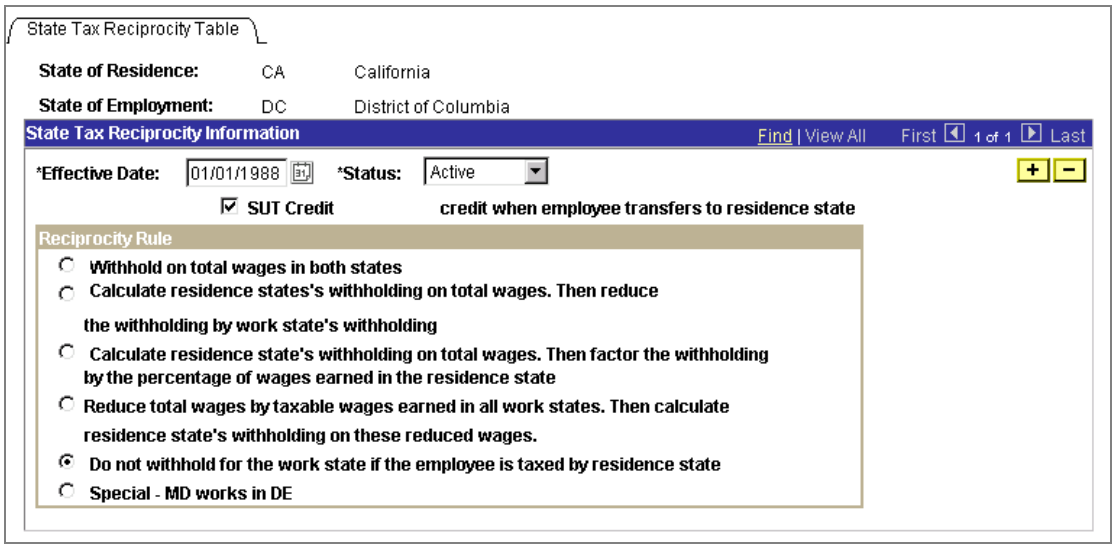
In this section we discuss how to view the state tax reciprocity withholding liability rules.

Page Used to View State Tax Reciprocity Withholding Liability Rules

Page Name	*Object Name*	*Navigation*	*Usage*
State Tax Reciprocity Table	STATE_TX_RECIP_TBL	Define Business Rules, Define Payroll Taxes, Setup, State Tax Reciprocity Table Define Business Rules, Define Payroll Taxes (USF), Setup, State Tax Reciprocity Table	Display the rules used during payroll calculation to determine withholding liability when an employee lives in one state and works in another.

Displaying State Tax Reciprocity Withholding Liability Rules

Access the State Tax Reciprocity Table page.



State Tax Reciprocity Table page

Reciprocity Rule This field displays the rule applied to the residence/employment state combination. The system references the laws of both states when deciding which rule to apply.

Although the residence state may also require withholding on the same wages, most states provide credit for taxes paid to another state. Many other examples of reciprocity agreements also exist between states. Under these agreements, wages earned in a work state that has an agreement with the residence state are taxed by, and taxes withheld are submitted to, the employee's residence state.

This table doesn't identify every state-to-state combination because most states have a single rule for dealing with residents who earn taxable wages in other states. The default reciprocity rule between a state of residence and all other states of employment is the one in which the **State of Employment** field is blank.

If you need to modify these table entries, consult the PeopleSoft Global Support Center.

Note. If you're a multi-state employer, review the rules in this table, particularly if you can be considered a non-resident employer for certain employees. For example, Alabama requires that resident employers withhold Alabama tax on wages earned both inside and outside the state by Alabama residents. Non-resident employers must withhold on only those wages earned in Alabama, regardless of where the employee resides. The entries in the State Tax Reciprocity Table—as delivered by PeopleSoft—assume that you are a resident employer in each state.

Viewing the Local Tax Reciprocity Rules

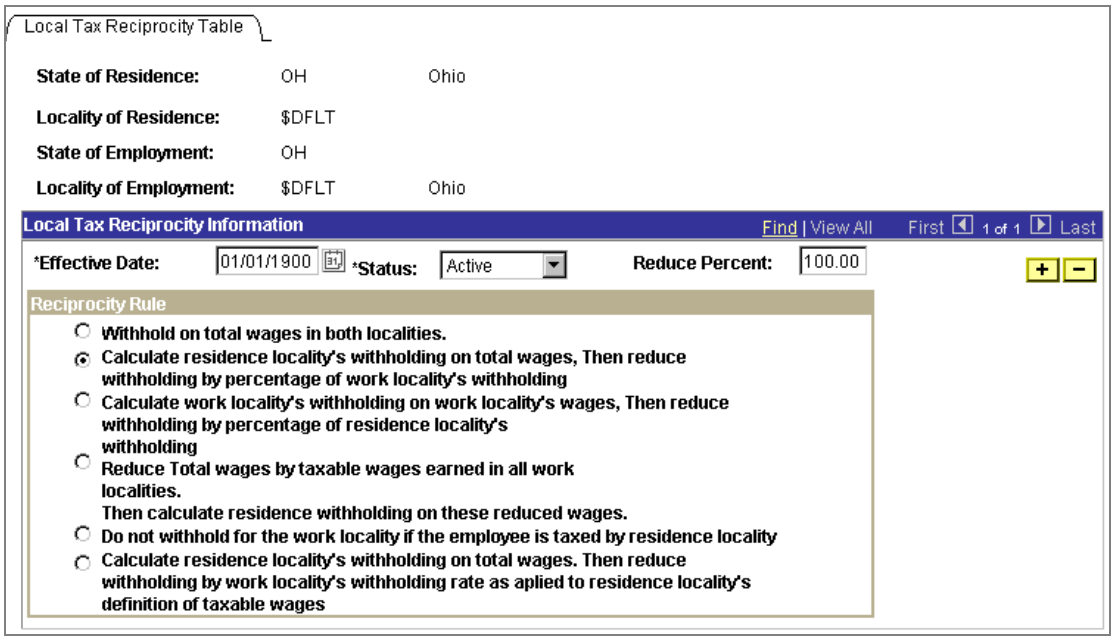
In this section we discuss how to view the local tax reciprocity rules. When the residence locality differs from the employment locality, the system calculates both taxes and applies the reciprocity rule from this table to produce the net withholding for the employee in each locality.

Page Used to View Local Tax Reciprocity Rules

Page Name	*Object Name*	*Navigation*	*Usage*
Local Tax Reciprocity Table	LOCL_TAX_RECIP_TBL	Define Business Rules, Define Payroll Taxes, Setup, Local Tax Reciprocity Table Define Business Rules, Define Payroll Taxes (USF), Setup, Local Tax Reciprocity Table	View reciprocal agreements between an employee's state of residence and a locality of employment.

Viewing Local Tax Reciprocity Rules

Access the Local Tax Reciprocity Table page.



Local Tax Reciprocity Table page

Locality of Residence The ID corresponding to the employee's locality of residence. This table does not identify every locality-to-locality combination, because most localities in a given state follow the same rule. The default value, ***$DFLT,*** appears when there is no individual entry. Any exceptions require separate entries and act as overrides.

Entries that identify reciprocity agreements between a state of residence and employment localities are special cases. The residence state is specified as usual, but the value in this field is a special code: ***STATERC.***

Locality of Employment The ID corresponding to the employee's locality of employment. This table does not identify every locality-to-locality combination, because most localities in a given state follow the same rule. The default value, ***$DFLT,*** appears when there is no individual entry. Any exceptions require separate entries and act as overrides.

Reduce Percent Represents a percent of employment withholding to be credited toward the withholding amount required by the place of residence. This is not always 100%. When such a credit applies, PeopleSoft displays the percent allowed.

Reciprocity Rule Displays the rule applied to the residence/ employment locality combination.

Establishing Reciprocal Agreements Between Work Localities

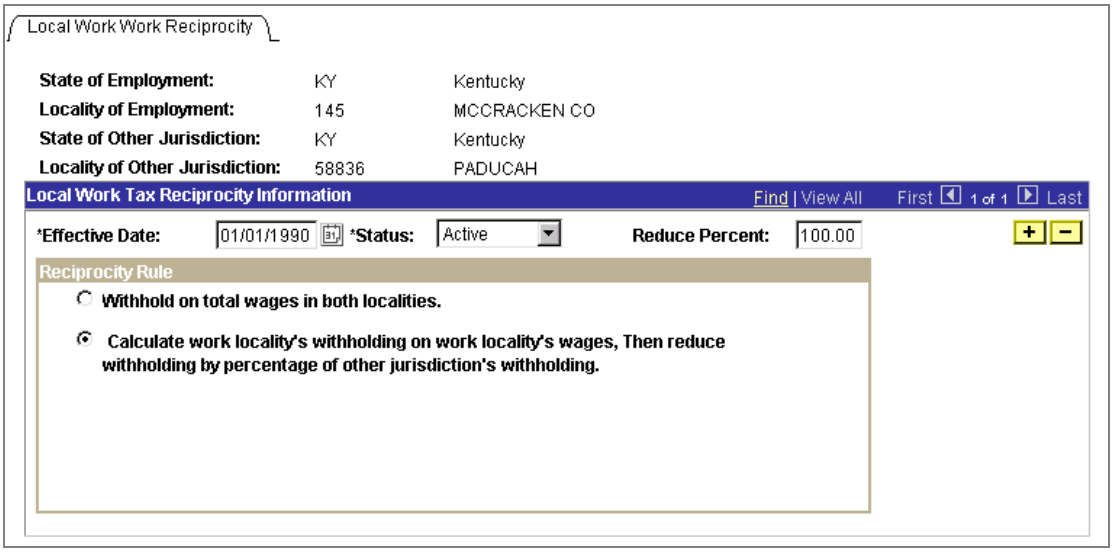
In this section we discuss how to establish reciprocal agreements between work localities.

Page Used to Establish Reciprocal Agreements Between Work Localities

Page Name	*Object Name*	*Navigation*	*Usage*
Local Work Work Reciprocity Table	LOCLWK_TXRCP_TABLE	Define Business Rules, Define Payroll Taxes, Setup, Local Work Work Reciprocity Define Business Rules, Define Payroll Taxes (USF), Setup, Local Work Work Reciprocity	Establish reciprocal agreements between work localities.

Defining Reciprocal Agreements Between Work Localities

Access the Local Work Work Reciprocity Table page.



Local Work Work Reciprocity Table page

State of Other Jurisdiction The state of other jurisdiction for each record represents the primary tax jurisdiction. That is, the jurisdiction whose tax must be withheld in full.

Locality of Other Jurisdiction This represents the primary tax jurisdiction. That is, the jurisdiction whose tax must be withheld in full.

Reduce Percent	Where allowed, this represents a percent of other jurisdiction withholding to be credited toward the withholding amount required by the locality of employment. This is not always 100%. When such a credit applies, PeopleSoft displays the percent allowed.
Reciprocity Rule	This field displays the rule applied to the residence/ employment locality combination.

See Also

PeopleSoft Payroll for North America, "Maintaining Payroll Data"

Updating the Taxable Gross Definition Table

In this section we discuss how to update the Taxable Gross Definition Table.

Understanding the Taxable Gross Definition Table

The Taxable Gross Definition Table defines the taxability for specific earnings or deduction types that must be treated differently at the state or local level than at the federal tax level. Taxing jurisdictions may have different rules as to whether a given type of earnings or deduction should be taxed.

PeopleSoft Payroll tracks these differences in taxability by documenting where the taxable wage definition of a particular jurisdiction differs from a standard definition for the following basic payroll tax types:

- Income
- Unemployment
- Disability

For each of these tax types, certain earnings and deductions are taxable, while others are not. What is taxable differs for each tax, so we have a separate standard definition for each type. Because most states and localities follow federal guidelines for taxing earnings, we chose Federal income tax withholding, Federal unemployment, and FICA as the standard taxes from which to develop these rules.

The system automatically maintains federal taxable grosses, FWT, FICA, and FUT, based on entries in the Earnings Table and Deduction Table:

Deduction Table	***Earnings Table***
Deduction classification =Taxable	Subject to FWT
Effect on FICA gross	Subject to FICA
Effect on FUT gross	Subject to FUT

Normally, the system calculates state and local taxes using the following taxable grosses:

To Calculate	*Payroll Uses*
State withholding taxes (SWT)	FWT gross
State unemployment taxes (SUT)	FUT gross
State disability insurance (SDI)	FUT gross
Local withholding taxes (LWT)	FWT gross

Why do we use the FUT gross as the starting point for SDI? California does not publish any separate definition of wages for CA-SDI. Instead, the state of California treats the definition of wages for CA-SDI purposes as the same as the definition of wages for CA-SUI purposes. Since SUI wages are based on FUT wages, and CA-SDI wages must match CA-SUI wages, FUT is the starting point for determining both CA-SUI and CA-SDI wages. Other states that have SDI also use FUT as the base.

You can override the federal definitions of taxable gross for the following taxable grosses:

- State withholding
- State unemployment
- State disability
- Local withholding

When a state or locality declares that taxability of a certain earnings deduction is different from one of these federal standards, a rule must be placed in the Taxable Gross Definition Table indicating the deviation. The system uses the rules stored in the Taxable Gross Definition Table to adjust the taxable gross for the states and localities that deviate from the norm.

For each of these taxable gross definitions, identify a Taxable Gross Component ID and assign it to the various states or localities affected.

What PeopleSoft Provides

PeopleSoft supplies entries on this table for 401(k), Section 125, and group-term life taxable gross definitions. You maintain any taxable gross definitions that you add.

For Section 125 cafeteria plans, the taxable gross definitions are for employee deductions only. You may have to set up your own entries to process specific parts of your plan. In some states, the taxability of deductions depends on whether the employee has the option of receiving cash.

Review the definitions in this table carefully with regard to their particular 125 plans.

Note. These pages are delivered as display-only. If you want to add or modify a Taxable Gross Definition, you must have the appropriate security authorization to adjust your standard record definitions.

How Taxable Gross Definitions Affect Earnings and Deductions

The standard definition of taxability of an earnings or deduction type is determined by entries on the Earnings and Deduction Tables. When establishing an entry on these tables, you specify if the earning or deduction is to be taxed for FWT, FUT, and FICA. Any earnings and deductions you marked as taxable are totaled during payroll processing to determine an employee's taxable gross for each of the standard tax types. For earnings or deduction types that increase or decrease the state or local taxable grosses compared to the federal taxable gross, enter a Taxable Gross Component ID that identifies which rules on the Taxable Gross Definition Table to use.

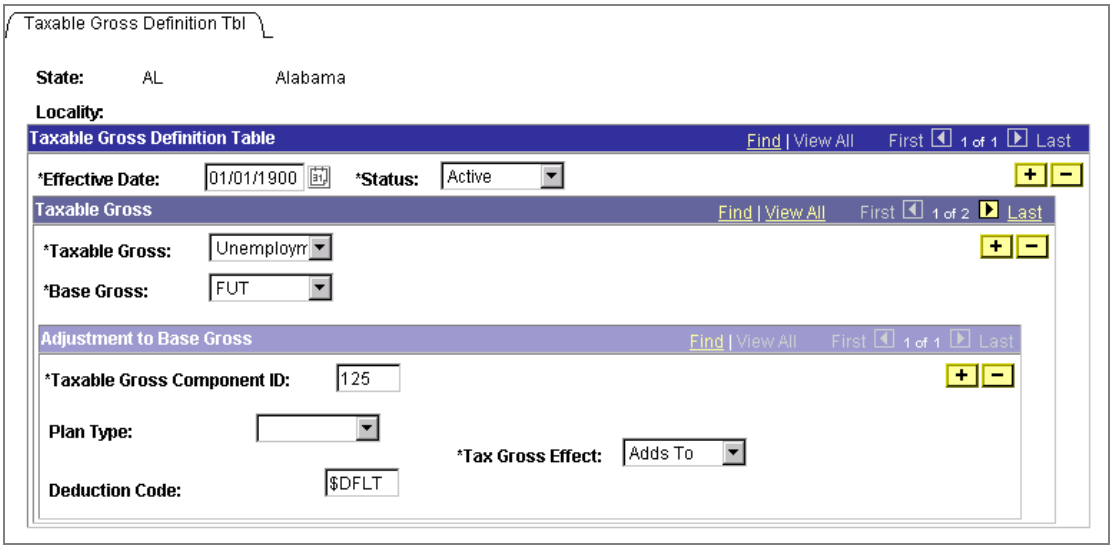
For example, Pennsylvania considers employee before-tax 401(k) contributions taxable for state withholding, whereas they are not taxed at the federal level. Therefore, we must have a Taxable Gross Definition for 401(k) deductions that indicate to the Payroll calculation programs that when taxable gross for withholding is determined, 401(k) deductions should be included as earnings for Pennsylvania (but not for federal) withholding purposes.

Page Used to Update the Taxable Gross Definition Table

Page Name	*Object Name*	*Navigation*	*Usage*
Taxable Gross Definition Table	TAXGR_DEFIN_TBL	Define Business Rules, Define Payroll Taxes, Setup, Taxable Gross Definition Tbl Define Business Rules, Define Payroll Taxes (USF), Setup, Taxable Gross Definition Tbl	Set up a Section 125 definition.

Setting Up a Section 125 Definition

Access the Taxable Gross Definition Table page.



Taxable Gross Definition Table page

Taxable Gross

Taxable Gross Select ***Disability, Unemployment,*** or ***Withholding*** to identify the type of taxable gross you're defining.

Base Gross Select either ***FICA, FUT*** (Federal Unemployment Tax) for unemployment or ***FWT*** (Federal Withholding Tax) for withholding.

Adjustment to Base Gross

This scroll area lists the specific components for which adjustments are necessary.

Taxable Gross Component ID The taxable gross component ID you specify must be unique. If it is not unique, it can cause the taxable grosses to be incorrect.

Tax Gross Effect This field controls the effect of the gross. It can either add to the gross, subtract from it, or have no effect.

Note. Pennsylvania does not recognize certain before-tax benefits deductions. It requires specific before-tax deductions to be included in taxable gross wages. You can identify these plans to the system by Plan Type and Deduction Code on the Taxable Gross Definition record for Pennsylvania. These fields pertain to Pennsylvania only.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Deductions"

PeopleSoft Payroll for North America PeopleBook, "Understanding Tax Options"

Entering a State's Marital Status Codes

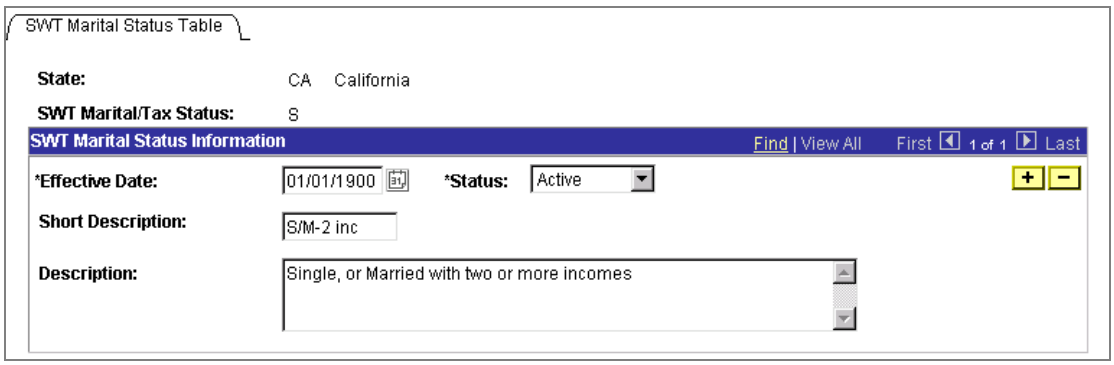
In this section we discuss how to enter a state's marital status codes.

Page Used to Enter a State's Marital Status Codes

Page Name	*Object Name*	*Navigation*	*Usage*
SWT Marital Status Table	SWT_MAR_STATUS_TBL	Define Business Rules, Define Payroll Taxes, Setup, SWT Marital Status Table Define Business Rules, Define Payroll Taxes (USF), Setup, SWT Marital Status Table	Enter a state's marital status codes.

Defining a State's Marital Status Codes

Access the SWT Marital Status Table page.



SWT Marital Status Table page

SWT Marital/Tax Status Enter the State Withholding tax marital tax status. It is used in the employee's state tax data.

(CAN) Viewing Canadian Tax Information

In this section we provide an overview of defining Canadian tax information and discuss how to:

- View the constant values required for calculation of contributions to Canada and Quebec pension plans and premiums for employment insurance.
- View the wage thresholds and rates for calculating Canadian federal surtax.

- View the rates, thresholds, and constants to determine withholding of Canadian provincial taxes.
- Display by province the net claim amount threshold and tax reduction amount.

The Canadian Tax Tables are used during payroll calculation to compute all federal, provincial, and Quebec taxes. Because these tables are maintained largely by PeopleSoft and updated based on the standards outlined in the Canada Customs and Revenue Agency (CCRA) publication Payroll Deductions Formulas for Computer Programs and the Revenu Quebec publication Guide for Employers: Source Deductions and Contributions, you shouldn't need to modify them. However, you can make changes using the Canadian Tax Table pages if you have the appropriate security authorization.

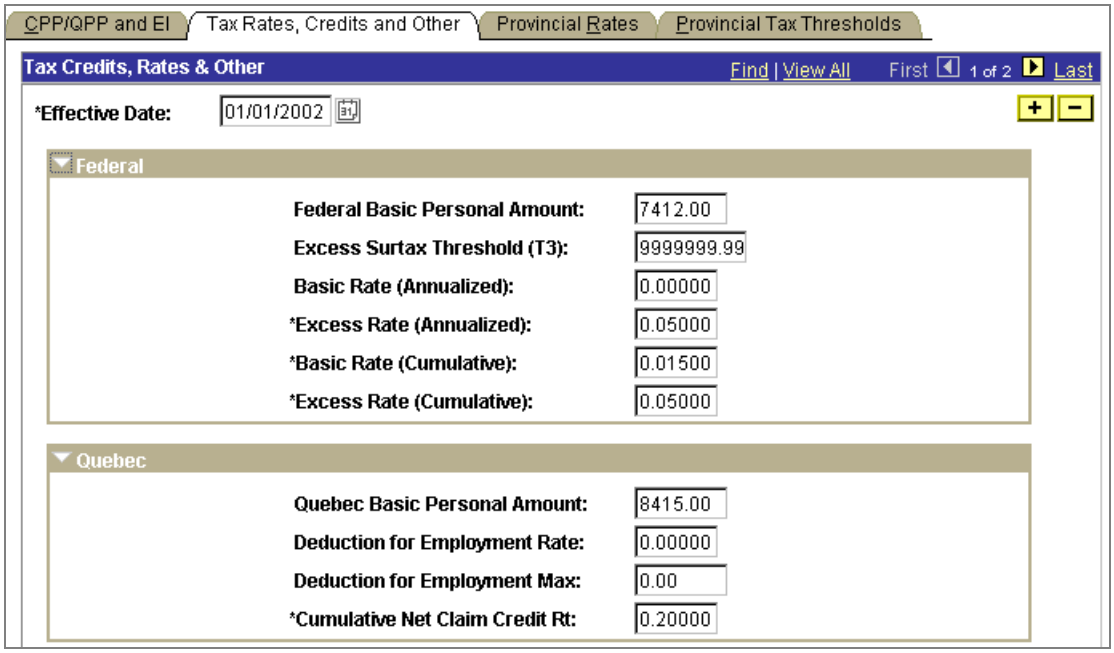
Pages Used to View Canadian Tax Information

Page Name	*Object Name*	*Navigation*	*Usage*
Canadian Tax Table - CPP/QPP EI	CAN_TAX_TABLE1	Define Business Rules, Define Payroll Taxes, Setup, Canadian Tax Table, CPP/QPP EI	Display the constant values required for calculation of contributions to Canada and Quebec Pension Plans and premiums for Employment Insurance. PeopleSoft maintains this table for you.
Canadian Tax Table - Tax Credits, Rates, and Other	CAN_TAX_TABLE4	Define Business Rules, Define Payroll Taxes, Setup, Canadian Tax Table, Tax Credits, Rates and Other	Display the wage threshold and rates for calculating Canadian federal surtax.
Canadian Tax Table - Provincial Rates	CAN_TAX_TABLE2	Define Business Rules, Define Payroll Taxes, Setup, Canadian Tax Table, Provincial Rates	Display rates, thresholds, and constants needed to determine withholding of Canadian provincial taxes, including withholding, health insurance, and sales taxes.

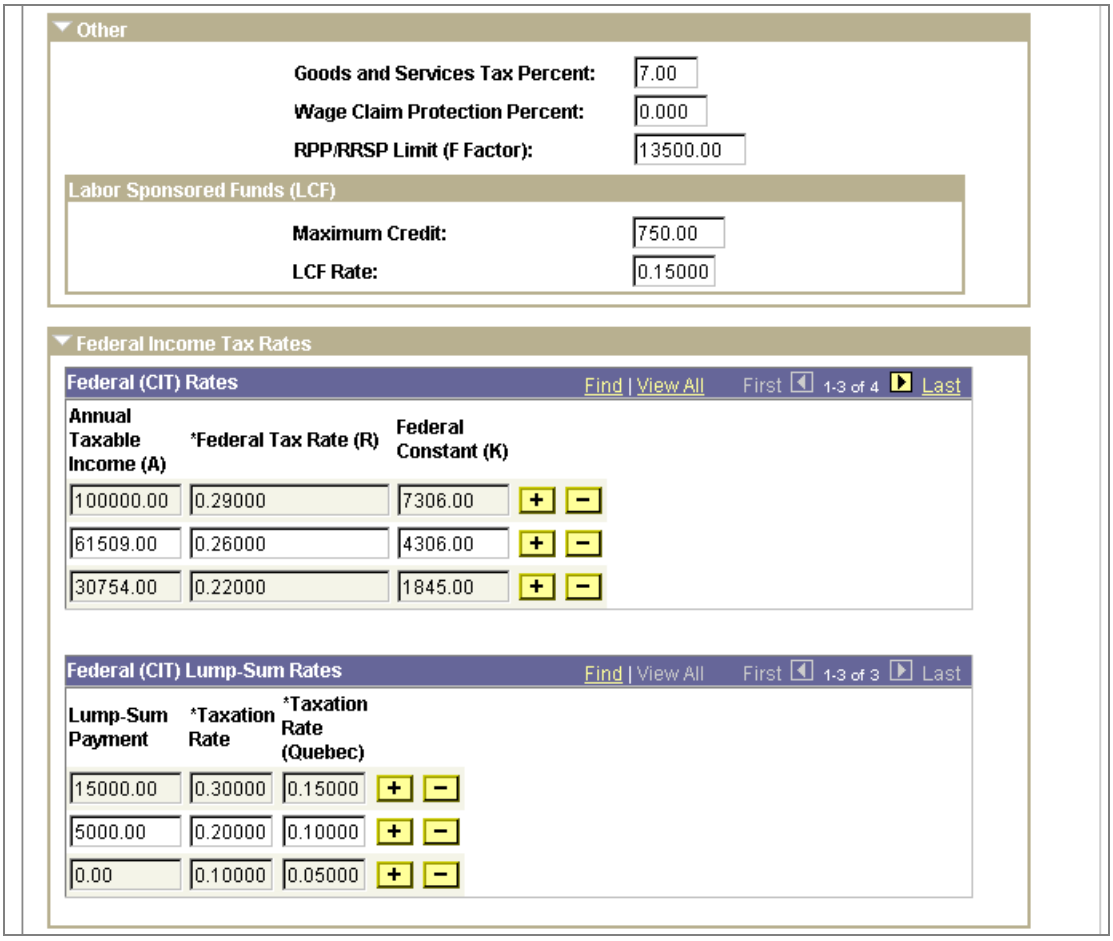
Page Name	Object Name	Navigation	Usage
Canadian Tax Table - Provincial Tax Thresholds	CAN_TAX_TABLE3	Define Business Rules, Define Payroll Taxes, Setup, Canadian Tax Table, Provincial Tax Thresholds	Display by province the net claim amount threshold and tax reduction amount. Note that this page does not affect all provinces. PeopleSoft maintains this table for you.

Viewing the Wage Thresholds and Rates for Calculating Canadian Federal Surtax

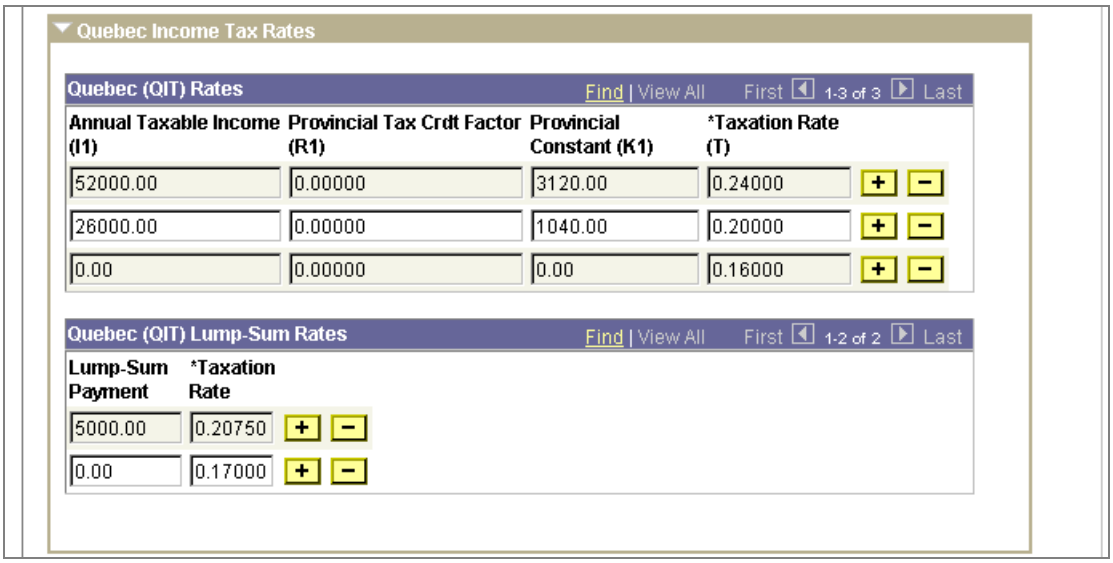
Access the Canadian Tax Table - Tax Credits, Rates, and Other page.



Canadian Tax Table - Tax Credits, Rates, and Other page (1 of 3)



Canadian Tax Table - Tax Credits, Rates, and Other page (2 of 3)



Canadian Tax Table - Tax Credits, Rates, and Other page (3 of 3)

Other Rates

RRP/RRSP Limit (F factor) This field is used during the calculation of Canadian income taxes subject to the commission tax method.

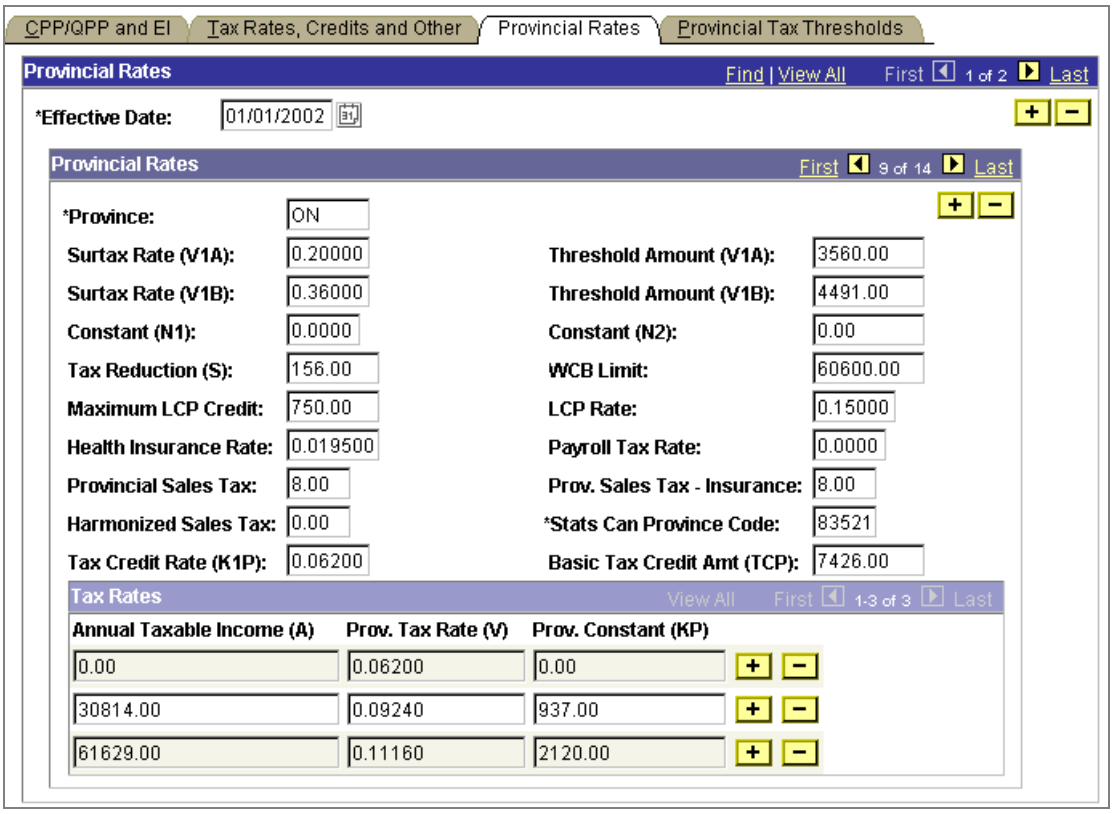
Labor Sponsored Funds (LCF)

Maximum Credit This field displays the monetary amount to be applied to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC). The federal tax credit is limited to the lesser of the maximum credit and the LCF Rate. The system applies this credit to each participating employee, according to the LCF Amount you enter on the employee's Canadian Income Tax Data page.

LCF Rate This field displays the percentage to be applied to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC). The federal tax credit is limited to the lesser of the maximum credit and the LCF rate. The system applies this credit to each participating employee according to the LCF Amount you enter on the employee's Canadian Income Tax Data page.

Viewing the Rates, Thresholds, and Constants to Determine Withholding of Canadian Provincial Taxes

Access the Canadian Tax Table - Provincial Rates page.



Canadian Tax Table - Provincial Rates page

Maximum LCP Credit For provinces where provincial labor-sponsored venture tax credits are available, you maintain the maximum LCP credit amount to be applied for that province on this table. This applies to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC).

LCP Rate For provinces where provincial labor-sponsored venture tax credits are available, you maintain the LCP rate to be applied for that province on this table. This applies to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC).

Health Insurance Rate You override the default health insurance rate on the Canadian Company Tax Table.

See Also

Defining Canadian Company Tax Information

Tax Tables That You Maintain

The tax tables described in the remaining section of this chapter are ones that your organization maintains.

- U.S. companies are responsible for setting up and maintaining the Company State Tax Table and the Company Local Tax Table.
- Canadian companies are responsible for maintaining the Canadian Wage Loss Plan Table and the Canadian Company Tax Table.
- Both U.S. and Canadian companies must maintain the Tax Form Definitions Table.

Establishing Company State Taxes

In this section, we discuss how to:

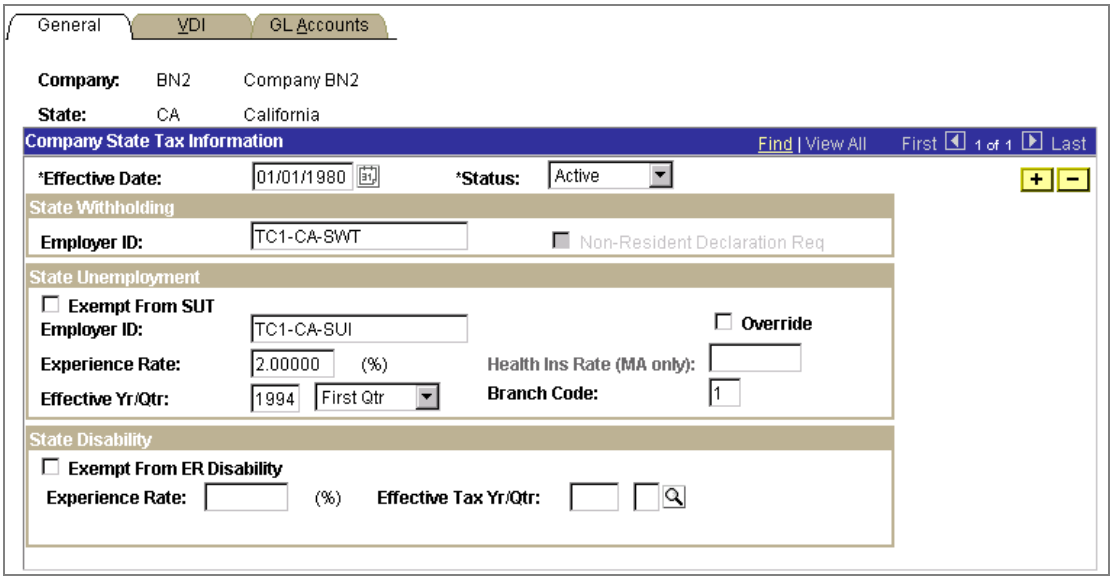
- Define an entry in the Agency State Tax Table for each state where your federal payroll agency collects or pays taxes.
- Establish the voluntary disability plans associated with the company.
- Enter your general ledger account numbers for state taxes.

Pages Used to Establish Company State Taxes

Page Name	*Object Name*	*Navigation*	*Usage*
Company State Tax Table General	CO_STATE_TAX_TBL	Define Business Rules, Define Payroll Taxes, Setup, Company State Tax Table, Company State Tax Table 1	Set up an entry in the Agency State Tax Table for each state where your federal payroll agency collects or pays taxes.
Company State Tax Table - VDI	CO_STATE_TAX_TBL2	Define Business Rules, Define Payroll Taxes, Setup, Company State Tax Table, Company State Tax Table 2	Establish the voluntary disability plans associated with the company.
Company State Tax Table - GL Accounts	CO_STATE_TAX_TBL3	Define Business Rules, Define Payroll Taxes, Setup, Company State Tax Table, Company State Tax Table 3	Enter your general ledger account numbers for state taxes.

Defining States Where You Collect or Pay Taxes

Access the Company State Tax Table General page.



Company State Tax Table General page

The State field in State Tax Data 1 and Local Tax Data is edited against this table. You must create entries in this table before entering any state and local tax information for your employees.

State Withholding

Employer ID — Enter your state employer ID for state withholding.

Non-Resident Declaration Req — This check box is set by default to either ***on*** or ***off*** according to the Federal/State Tax Table 1 record for the state. Indicates whether the state requires a Non-Resident Declaration for non-resident employees.

State Unemployment

Exempt From SUT — Select this check box if the company is not required to pay SUT for this state. Use this option if you've specified, on the Company Table, that the company as a whole is not exempt from SUT. If you select it here, Exempt from SUT becomes the default at the employee level; employees hired in this state have this check box selected on Maintain Payroll Data, State Tax Data 2.

Employer ID — Enter your state employer ID for state unemployment.

Override — The Massachusetts standard **Health Ins Rate** is set by default from the State Tax Table. For Massachusetts, the Health Insurance Rate differs for newer employers. If you're a Massachusetts employer to whom a lower rate applies, select this check box and enter the correct Massachusetts **Health Ins Rate**.

Experience Rate — The experience rate you enter in the **State Unemployment** group box should reflect the rate you receive from your state unemployment agency. Enter the year and quarter when the rate becomes effective in the **Effective Yr/Qtr** field. This enables you to have different rates within a single calendar year.

Health Ins Rate (MA only) — Each state's standard health insurance rate is set by default from the State Tax Table. For Massachusetts, however, the health insurance rate differs for newer employers. If you're a Massachusetts employer to whom a lower rate applies, select **Override** in the **Employer IDs** group box and enter the correct **Health Ins Rate.**

Branch Code — If your agency is based in California, you can use a branch code to designate by location where wages are earned. Use this option to track earnings by location for unemployment insurance.

State Disability

Exempt From ER Disability — Select this check box if employees in this state are exempt from state disability tax. Use this option if you've specified on the Company Table that the Employees' SDI Status is *Subject* for the company as a whole. If you select this check box, *Exempt* becomes the default SDI Status for this state at the employee level; employees hired in this state will have *Exempt* selected as their SDI Status on Maintain Payroll Data, State Tax Data 2.

Experience Rate — The experience rate you enter in the **State Disability** group box should reflect the rate you receive from your state disability agency. Enter the year and quarter when the rate becomes effective in **Effective Tax Yr/Qtr**. This enables you to have different rates within a single calendar year.

Employer ID (E&G) — Enter the appropriate employer ID for the **State Disability** group. This is used for quarterly tax reporting for California when you specify to separately report UI, DI, and PIT wages. You can set this default on the Company Table.

Note. The TAX002 and TAX810 reports are generated based on SUT wages. When you select the **Exempt From SUT** field, the system does not generate taxable wages, and the TAX810 report cannot be run.

Perform the following to generate taxable earnings, enabling the TAX810 report to run, while still remaining exempt from State Unemployment Taxes:

1. Ensure that the Company Exempt from SUT field on the Company Table-FICA/Tax Details page is cleared.

2. Leave the Exempt From SUT field on the Company State Tax Table 1 page cleared.

   These steps should ensure that the Exempt From SUT field on the State Tax Data 2 field remains clear for each employee. Verify that the Exempt From SUT field is clear on all three pages.

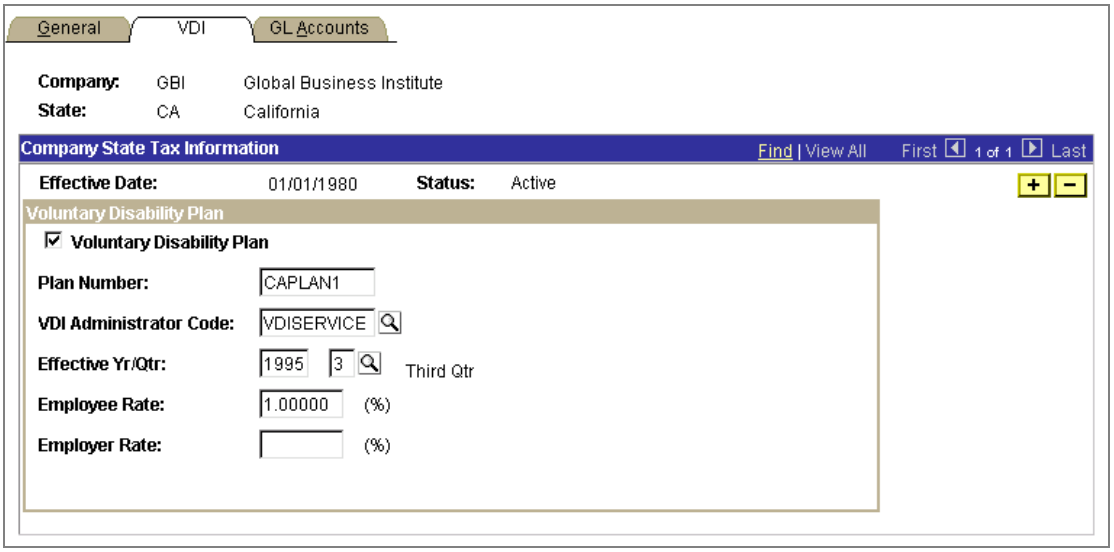
3. Enter a value of 0 (zero) in the State Unemployment Experience Rate.

After you do these steps, the system can track taxable wages without calculating SUT tax dollars. The TAX002 or TAX810 report can run and report the taxable wages.

Note. You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. There will be a record for a subsequent quarter only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error "SUT rate not found on Company/State Tax Table" during Pay Calculation. This error occurs regardless of the pay end date you are processing.

Establishing Voluntary Disability Plans

Access the Company State Tax Table - VDI page.



Company State Tax Table - VDI page

Voluntary Disability Plan Select this check box to indicate that the plan you're defining is a voluntary disability plan allowed by the state.

Plan Number Enter the plan number of the voluntary disability plan. For New Jersey, this number appears on W-2s.

VDI Administrator Code Select the code that identifies the administrator of the voluntary disability plan. You maintain VDI Administrator Codes on the VDI Administrator Table.

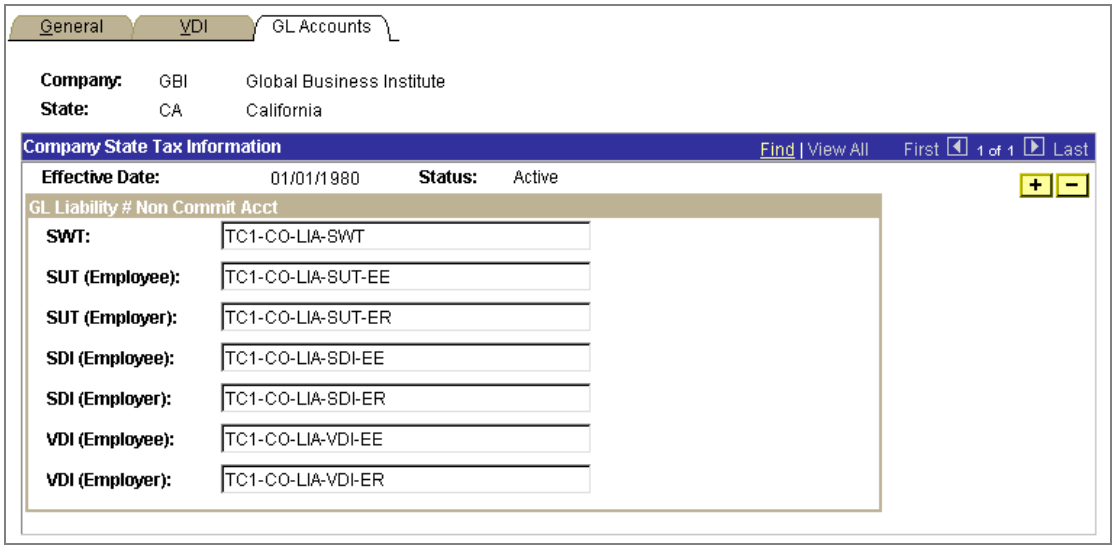
Employee Rate Enter the employee-paid rate.

Employer Rate Enter the employer-paid rate.

To set up VDI with a rate of zero so that you can track the VDI wages, follow all of the steps outlined previously in the section of this document titled Basic VDI Setup. However, you should enter ***99.99999*** as the **Employee Rate** and **Employer Rate** in the Company State Tax Table - VDI page.

Entering General Ledger Account Numbers for State Taxes

Access the Company State Tax Table - GL Accounts page.



Company State Tax Table - GL Accounts page

Enter the general ledger account numbers, if applicable, for the following company liabilities:

SWT State Withholding liabilities.

SUT (Employee) State Unemployment employee liabilities.

SUT (Employer) State Unemployment employer liabilities.

SDI (Employee) State Disability employee liabilities.

SDI (Employer) State Disability employer liabilities.

VDI (Employee) Voluntary Disability employee liabilities.

VDI (Employer) Voluntary Disability employer liabilities.

Maintaining the Tax Collector Table for Pennsylvania

For each municipality and overlying school district, the State Tax Register lists the effective rates for both Earned Income and Occupational Privilege taxes for residents and, when applicable, non-residents. Earned income and occupational privilege tax collector information for each municipality and school district are also listed. In some instances, there are different tax collectors for the school district. When this occurs, employers must remit the school district's tax to its collector and the municipality's tax to its collector.

Tax collectors are set up as vendors using the Tax Collector Table component. You'll use the vendor tables to enter information about the tax-collecting agency. You then enter the vendor code on the Local Tax Type-Classes page.

See also

"Setting Up Vendors"

Linking a Tax Type to the Local Tax Authority and Tax Classes

Defining an Entry for the Local Tax Table

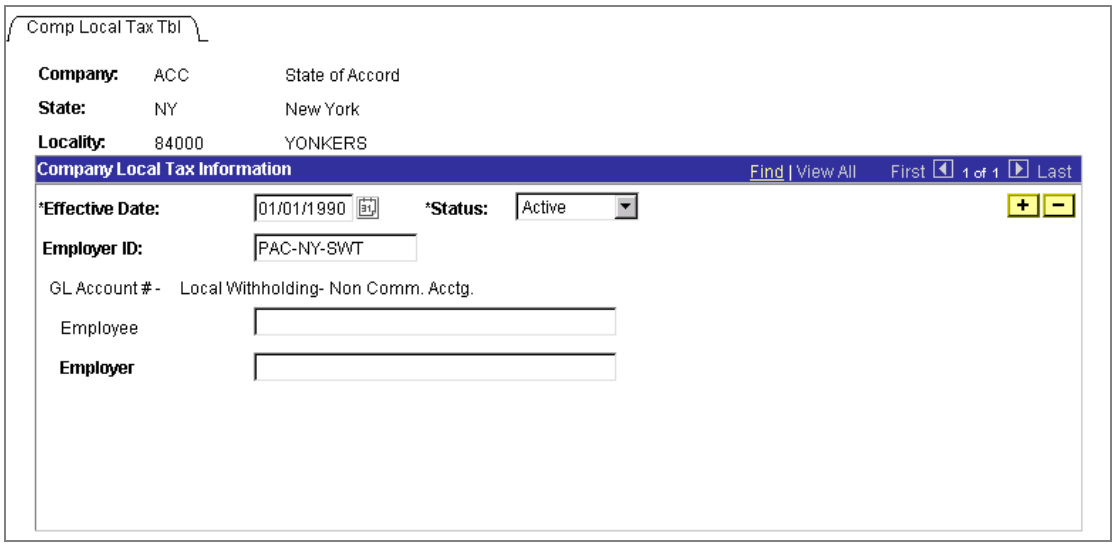
This section discusses how to set up an entry in the Local Tax Table for each locality where the company withholds or pays taxes. You must complete this table before local tax data for employees is entered, because the locality field on the Local Tax Data page is edited against this table.

Page Used to Define an Entry for the Local Tax Table

Page Name	*Object Name*	*Navigation*	*Usage*
Company Local Tax Table	COMP_LOCAL_TAX_TBL	Define Business Rules, Define Payroll Taxes, Setup, Company Local Tax Table	Set up an entry in the Company Local Tax Table page for each locality where the company withholds or pays taxes.

Setting Up Company Tax Localities Entries

Access the Company Local Tax Table page.



Company Local Tax Table page

Employer ID This field is used for local withholding tax for this locality. It is set by default to the Employer ID for state withholding taxes on the Company State Tax Table.

Employee and **Employer** If you have a general ledger account numbers to which you post liability for local withholding tax for this locality, enter the employee and employer account numbers here.

Establishing Tax Types for Accounts Payable Integration

This section provides an overview of tax types for accounts payable integration and discusses how to:

- Define names of tax types to use for accounts payable integration.
- Link a tax type to a federal or state tax authority and set of tax classes.
- Link a tax type to the local tax authority and tax classes.
- Define Canadian federal and provincial tax types.

Understanding Tax Types for Accounts Payable Integration

If you plan to use PeopleSoft Payables to send tax authorities the taxes deducted from employees' paychecks, you must link the appropriate set of deductions to each tax vendor. This is a two-step process:

1. Create names for the tax types you want to use. A tax type represents a collection of tax classes, such as withholding, earned income credit, and so on, specific to a particular tax jurisdiction (federal, state, local, provincial). You define U.S. tax types from the Tax Type Table. For Canadian taxes, use the Canadian Tax Type Table page.

2. Define each tax type by jurisdiction. That is, you select the set of tax classes that are to be paid to the vendor you specify. You use the following pages, as appropriate: Fed/State Tax Types/Classes, Local Tax Types/Classes, and Canadian Tax Type Table.

Example

In the state of California, employees are subject to two taxes for short-term disability: SDI (paid to the state) and OASDI (paid to the federal government). Each tax is comprised of a different set of tax classes. In this case, we might create a tax type named Short-Term disability. We would then access the Fed/State Tax Type/Classes page and define what Short-Term Disability represents at the federal level: For the vendor, we select the Internal Revenue Service; for the tax classes we select only those included in OASDI. We then repeat the process to define Short-Term Disability at the state level. This time, we select the Franchise Tax Board as the vendor and just those tax classes that contribute to SDI.

Common Elements Used in This Component

Tax Type — Select the tax type you want to define. The prompt table displays the names of the tax types you set up on the Tax Type Table page.

SetID — Select the setID for the tax type. This determines which set of vendors (tax authorities) you can select from the Vendor ID field.

Vendor ID — Select the tax authority (vendor) to which you want the state, federal, local, or province taxes for this tax type paid. The prompt table displays only those vendors associated with the setID you selected.

Class Name — From the drop-down list box, select the tax classes associated with this tax type and vendor. Add all applicable tax classes.

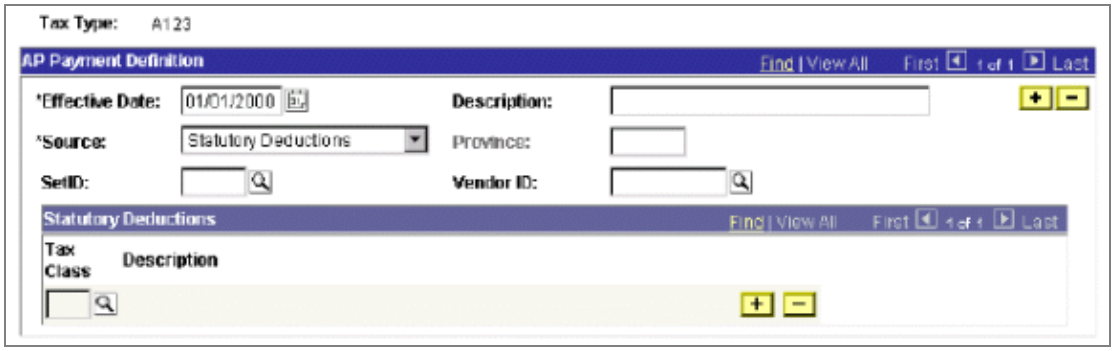
Pages Used for Accounts Payable Integration

Page Name	*Object Name*	*Navigation*	*Usage*
Tax Type Table	TAX_TYPE_TBL	Define Business Rules, Define Payroll Taxes, Setup, Tax Type Table	Define the names of the tax types you want to use.
State Tax Type Table	STAT_TAX_TYPE_PNL	Define Business Rules, Define Payroll Taxes, Setup, State Tax TypeTable	Link a tax type to a federal or state tax authority and set of tax classes.
Local Tax Type Table	LOCL_TAX_TYPE_PNL	Define Business Rules, Define Payroll Taxes, Setup, Local Tax Type Table	Link a tax type to the local tax authority and the applicable set of tax classes.

Page Name	Object Name	Navigation	Usage
Canadian Tax Type Table	CAN_TAX_TYPE	Define Business Rules, Define Payroll Taxes, Setup, Canadian Tax Type Table	Define Canadian federal and provincial tax types.

(CAN) Defining Canadian Federal and Provincial Tax Types

Access the Canadian Tax Type Table page.



Canadian Tax Type Table page

Source Select the type of tax transaction from the drop-down list. Values include ***Goods and Services Tax, Health and Payroll Taxes, Provincial Sales Tax,*** or ***Statutory Deductions.***

Province If you chose ***Provincial Sales Tax*** in the **Source** field, select the **Province** in this field.

Tax Class From the drop-down list box, select the tax class you want to associate with this tax type and vendor. Add all applicable tax classes. The **Source** field determines which tax classes are available for selection.

If ***Goods and Services Tax*** is selected, only federal sales tax types are allowed: ***G (GST)*** and ***H (HST).***

If ***Health and Payroll Taxes*** is selected, only health and payroll tax types are allowed: ***HTX*** and ***PYT.***

If ***Provincial Sales Tax*** is selected, only provincial sales tax types are allowed: ***I (PSTI), P (PST), Q (QSTI), S (QST), T (PPT),*** and ***U (QPT).***

If ***Statutory Deductions*** is selected, only income related tax types are available: ***CIT, CPP, CPR, EIE, EIR, QIT, QPP, QPR, RV2*** and ***T4A.***

See Also

"Setting Up Vendors"

Defining Tax Locations

This section provides an overview of defining tax locations and discusses how to:

- Establish the locations for which you process payroll and taxes.
- Associate any number of states, localities, and linked localities.

Understanding Tax Locations

The system establishes federal, state, and local employee tax data and tax distribution data according to the information you establish in the Tax Location Table. In this table, you establish each of your locations with a Tax Location ID and identify the work states, provinces, and localities associated with each tax location.

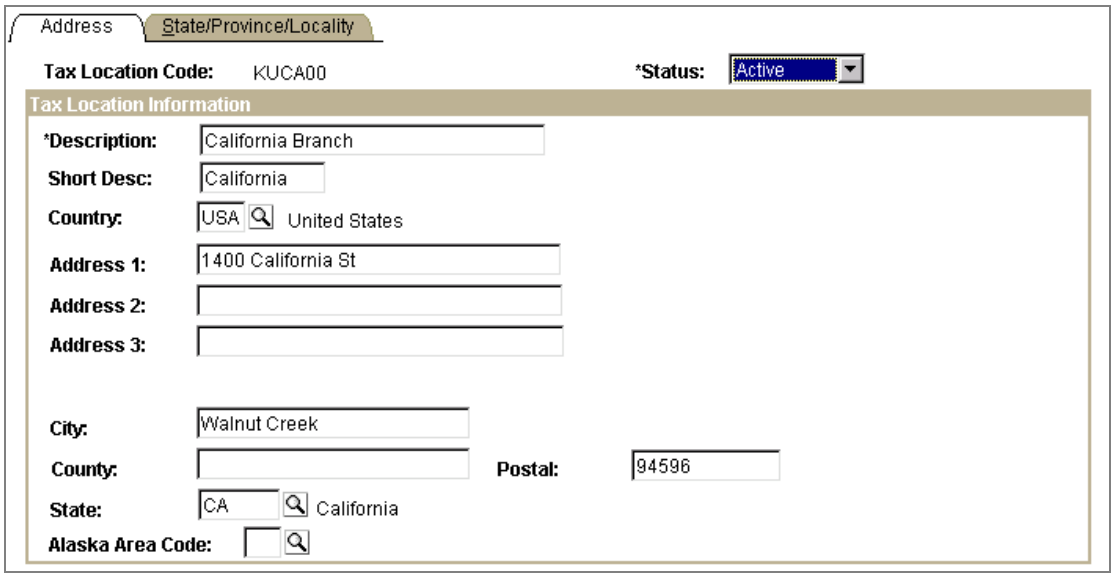
Note. If you've selected Automatic Employee Tax Data on the Installation Table, the system automatically sets up tax data for each work and resident state and locality of each of your employees. Tax distribution records are created for the work state/locality if the tax location represents a single state/locality.

Pages Used to Define Tax Locations

Page Name	*Object Name*	*Navigation*	*Usage*
Tax Location Table - Address	TAX_LOCATION_TBL1	Define Business Rules, Define Payroll Taxes, Setup, Tax Location Table, Address Page Define Business Rules, Define Payroll Taxes (USF), Tax Location Table, Address Page	Establish the locations for which you process payroll and taxes.
Tax Location Table – State/Province/Locality	TAX_LOCATION_TBL2	Define Business Rules, Define Payroll Taxes, Setup, Tax Location Table, Locality Page Define Business Rules, Define Payroll Taxes (USF), Tax Location Table, State/Province/Locality Page	Associate any number of states, localities, and linked localities with the tax location code.

Establishing the Locations for Which You Process Payroll and Taxes

Access the Tax Location Table - Address page.



Tax Location Table - Address page

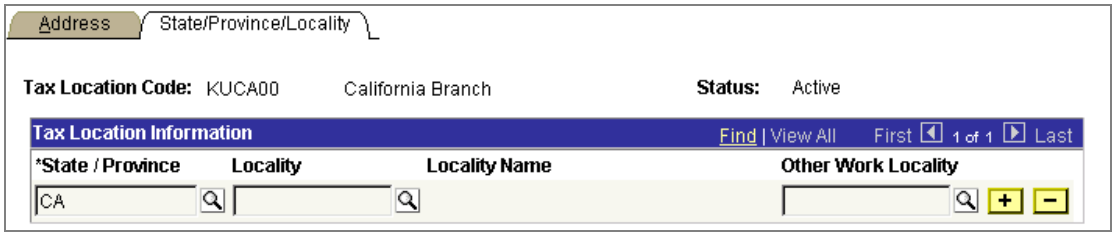
Tax Location Code Establish a tax location code for each location for which you process payroll and tax data. You can associate any number of states and localities with each code.

Alaska Area Code If applicable, select an Alaskan area code.

Note. If you select Automatic Employee Tax Data on Installation Table 1 and assign a Tax Location ID to each employee on the Job Data Table, each employee's tax data is set by default to the Employee Tax Data page and the Employee Tax Distribution page.

Associating States and Localities With the Tax Location Code

Access the Tax Location Table – State/Province/Locality page.



Tax Location Table - Locality page

State

Use to identify each state that is associated with the tax location code. You can associate any number of states with a single tax location. For each state, identify each taxing locality, if any.

The states you associate with this tax location code must be defined on the Company State Tax Table and the Company Local Tax Table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

Locality

The localities you associate with this tax location code must be defined on the Company State Tax Table and the Company Local Tax Table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

Other Work Locality

Use this field only where multiple taxes apply in one location, such as:

- Paducah, KY and McCracken County, KY.
- Earned Income Tax, School District and Occupational Privilege Tax in Pennsylvania.

To form further links in a locality chain:

- Add another row with the same state.
- Enter the other work locality from the previous row in Locality.
- Enter the new other work locality.

Note. You should never attempt to enter multiple Indiana localities. Regardless of the number of Indiana locations in which an employee may work, either simultaneously or over the course of the year, the employee is liable for Indiana county tax for only one Indiana county per calendar year. This is the Indiana county of residence as of January 1, if that county imposes a tax, or the Indiana county of principal work activity as of January 1, if the residence county does not impose a tax.

Note. Locality and **Other Work Locality** are not required in Canada, because a Canadian employee can be taxed in only one Province at a time, and there are no locality taxes in Canada.

See Also

"Setting Up Companies, Agencies, and Locations"

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Hiring an Employee

PeopleSoft Payroll for North America PeopleBook, "Maintaining Payroll Data"

(E&G) Establishing 1042 Processing for Non-resident Aliens

This section provides an overview of establishing 1042 processing for non-resident aliens and discusses how to set up the rules associated with the treaties required for each country with which the U.S. has an agreement.

Understanding Tax Treaties

The U.S. government has entered into tax treaties with nearly 40 foreign jurisdictions. Income tax treaties coordinate the tax systems of the United States and other countries that are parties to treaties. Treaty provisions affect the taxation of non-resident aliens working in the U.S. While tax treaties are generally based on a standard model, each treaty might have slightly different provisions.

To claim benefits of a treaty, an employee must have a visa and be a resident of one of the treaty countries. An employee can claim benefits of only one treaty at any given time. Employees who want to claim benefits under a tax treaty must submit a written statement and applicable forms (W-4, Form 8233, Form 1001) to their employer.

As an employer, you must apply the specific treaty rules when calculating federal withholding tax. These rules often include time limits and earnings caps. Different types of earnings, such as scholarships, grants, and fellowships, might be subject to different taxation rates. You must produce a Form 1042-S and a 1042 summary form for each non-resident alien employee affected by the special withholding rates. If you file 250 or more 1042-S forms, you must report on magnetic media. Earnings reported on a 1042-S are not reported on a W2; so, an employee may need both a W2 and a 1042-S if some earnings are covered by the special tax treaty rates and some are not.

In addition to employees covered by tax treaties, some non-resident alien employees, such as those with specific types of earnings such as scholarships, fellowships, and grants, must also have those earnings reported on a 1042-S.

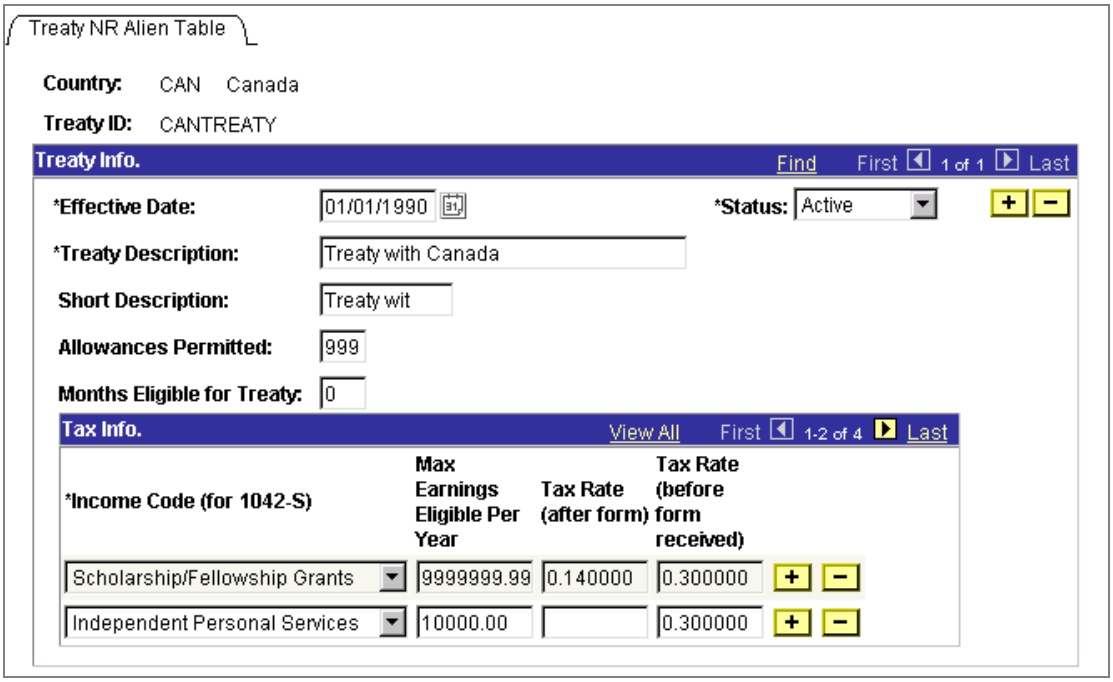
Use this page to capture the tax rates specified in tax treaties (including exempt earnings, which are recorded with a 0% tax rate). This table identifies those earnings subject to a 30% flat withholding tax.

Page Used to Establish 1042 Processing for Non-Resident Aliens

Page Name	Object Name	Navigation	Usage
Treaty/NR Alien Table	TREATY_NRA_TABLE	Define Business Rules, Define Payroll Taxes, Setup, Treaty NR Alien Table	Set up the rules associated with the treaties required for each country with which the U.S. has an agreement.

Setting Up 1042 Processing for Non-Resident Aliens

Access the Treaty/NR Alien Table page.



Treaty NR Alien Table page

Country If you want to establish entries on the Tax Treaty NR Alien Table that are applicable to more than one country (for example, to use for all scholarship income that is to be taxed at 30%), you can use any value prefixed by a $ in the country code (for example, **Country** = ***$S***).

Allowances Permitted For each tax treaty record you establish, specify the number of allowances permitted by the treaty.

Income Code (for 1042-S) Select each type of earnings subject to special tax treatment under the treaty**.**

Max Earnings Eligible Specify the earnings caps that apply for each earnings type.

Per Year

Tax Rate (after form)	Specify the taxation rates that apply for each earnings type.
Tax Rate (before form received)	Specify the taxation rates that apply for each earnings type.

Note. PeopleSoft re-delivers the tax treaty table with each major release and with each Application Update. If interim changes are required, you must track and apply the changes in your environment.

See Also

PeopleSoft Payroll for North America PeopleBook, "Maintaining Payroll Data"

Establishing UI Report Codes

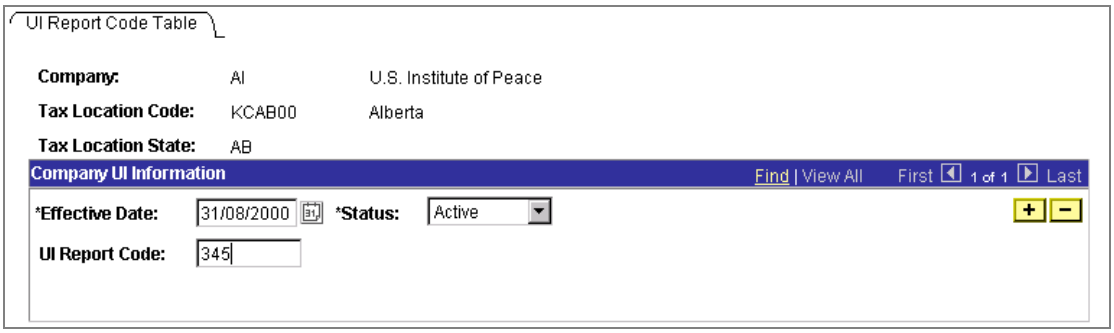
This section discusses how to set up UI report codes for each of your company's work sites.

Page Used to Establish UI Report Codes

Page Name	*Object Name*	*Navigation*	*Usage*
UI Report Code Table	CO_UI_RPTCD_TBL	Define Business Rules, Define Payroll Taxes, Setup, UI Report Code Table Define Business Rules, Define Payroll Taxes (USF), Setup, UI Report Code Table	Establish UI report codes in PeopleSoft Payroll for multiple work sites.

Setting Up UI Report Codes

Access the UI Report Code Table page.



UI Report Code Table page

Information you enter here works the Multiple Worksite Report (SQR TAX004). When you add an entry to the UI Report Code Table, the system prompts you to enter the company code and the location code of the site you want to establish for reporting statistics to state or county authorities.

Company UI Information

UI Report Code Enter the code you have received from the state for this site.

Establishing U.S. Standard Occupational Classifications for Alaska

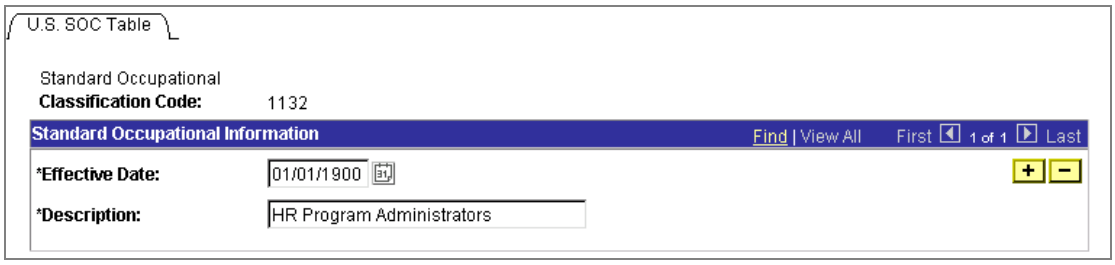
This section discusses how to set up the U.S. Standard Occupational Classification (SOC) Table page in quarterly unemployment insurance reporting for the state of Alaska. If your company has no operations in Alaska, ignore this table.

Page Used to Establish U.S. Standard Occupational Classifications for Alaska

Page Name	*Object Name*	*Navigation*	*Usage*
U.S. Standard Occupational Classification Table	US_SOC_TABLE	Define Business Rules, Define Payroll Taxes, Setup, U.S. SOC Table Define Business Rules, Define Payroll Taxes (USF), Setup, U.S. SOC Table	Set up the U.S. Standard Occupational Classification (SOC) Table page in quarterly unemployment insurance reporting for the state of Alaska.

Setting Up U.S. Standard Occupational Classifications for Alaska

Access the U.S. Standard Occupational Classification Table page.



U.S. Standard Occupational Classification Table page

Standard Occupational Classification Code The codes established here are used in the reports Quarterly State Employee Wage Listing for Alaska (TAX002AK) and Quarterly UI Wage Tape for Alaska (TAX810AK). These reports correspond to Alaska's quarterly *Employer's Report of Wages for Each Employee* form.

Note. Use the Job Code Table in Manage Human Resources to link Standard Occupational Classification codes with particular job codes in your organization.

Specifying Voluntary Disability Insurance Plan Location and Contact Information

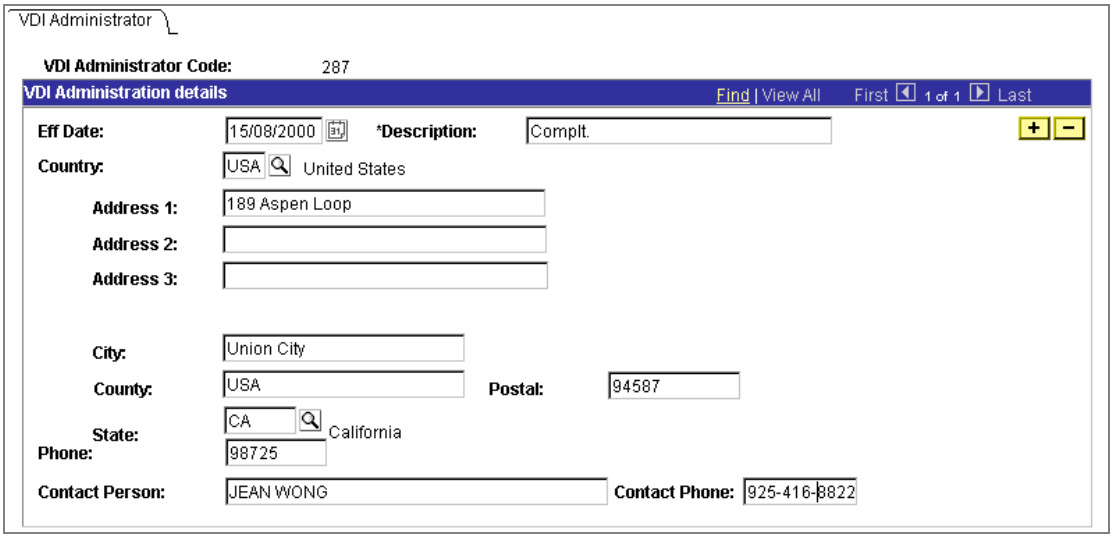
This section discusses how to enter location and contact information for administrators of any voluntary disability plans for your organization.

Page Used to Enter Voluntary Disability Insurance Plan Location and Contact Information

Page Name	*Object Name*	*Navigation*	*Usage*
VDI Administrator	VDI_ADMIN_TABLE	Define Business Rules, Define Payroll Taxes, Setup, VDI Administrator Table Define Business Rules, Define Payroll Taxes (USF), Setup, VDI Administrator	Enter location and contact information about the administrators of employee voluntary disability plans.

Entering Voluntary Disability Insurance Plan Location and Contact Information

Access the VDI Administrator page.



VDI Administrator page

VDI Administrator Code The VDI administrator code you entered appears. After you've established your VDI Administrators, assign administrators to their voluntary disability plans on the Company State Tax Table 2 page.

Specifying Parameters for Yearly and Quarterly Tax Reporting

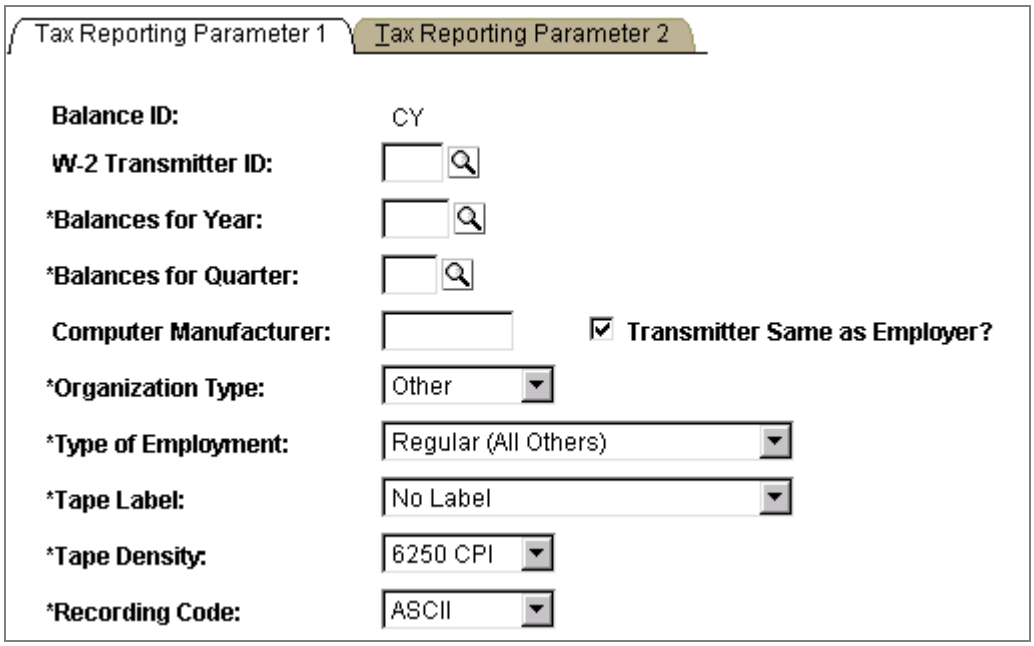
This section discusses how to specify parameters for yearly and quarterly tax reporting.

Page Used to Specify Parameters for Yearly and Quarterly Tax Reporting

Page Name	*Object Name*	*Navigation*	*Usage*
Tax Reporting Parameter 1	TAX_RPT_PARAMETERS	Compensate Employees, Manage Quarterly Tax Rptg (U.S.), Setup, Tax Reporting Parameters, Tax Reporting Parameter 1	Set up parameters for yearly and quarterly tax reporting.

Defining Parameters for Yearly and Quarterly Tax Reporting

Access the Tax Reporting Parameter 1 page.



Tax Reporting Parameter 1 page

W-2 Transmitter ID Enter the Company ID of the company transmitting W-2s for tax reporting. This is used in a multi-company environment when a single company acts as the transmitter for all companies in the organization.

Balances for Year The value you enter here defines the reporting period.

Balances for Quarter The value you enter here defines the reporting period.

Computer Manufacturer Enter the name of the manufacturer, such as IBM, Compaq, or Digital that makes the computer you use to create the magnetic media (such as diskette or tape) for tax reporting.

Transmitter Same as Employer? This field is not currently used by Payroll for North America.

Organization Type Select ***Government*** or ***Other.***

Type of Employment Select ***Agriculture, Federal, Medicare Qualified Government Employee, Military, Railroad,*** or ***Regular (All Others).***

Recording Code Select ***ASCII*** or ***EBCDIC.***

(CAN) Defining Canadian Tax Information

In this section we discuss how to:

- Define Canadian company tax information

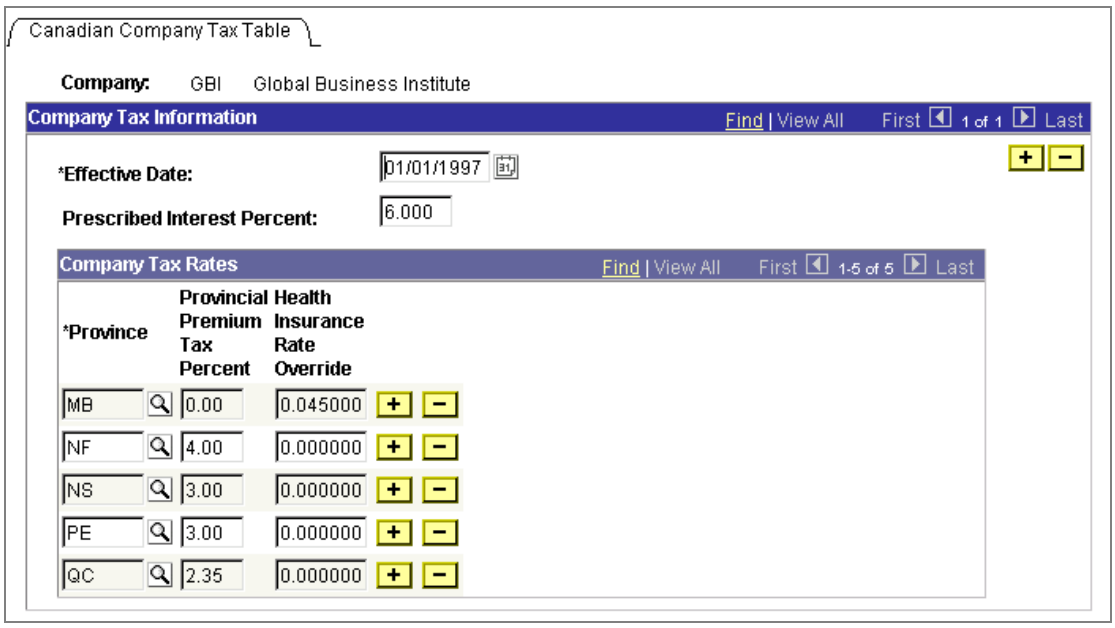
- Define Canadian wage loss plans.
- Define Canadian yearly tax reporting parameters.

Pages Used to Define Canadian Tax Information

Page Name	*Object Name*	*Navigation*	*Usage*
Canadian Company Tax Table	CAN_USR_TAX_TABLE1	Define Business Rules, Define Payroll Taxes, Setup, Canadian Company Tax Table	Identify the Prescribed Interest Percent, Province, Provincial Premium Tax Percent, and Health Insurance Rate Override for each company you set up.
Canadian Wage Loss Plan Table - Wage Loss Plan Liability Accounts	WAGES_PLN_TBL1	Define Business Rules, Define Payroll Taxes, Setup, Canadian Wage Loss Plan Tbl, Wage Loss Plan Liability Accounts	Define a wage loss plan for your company.
Canadian Wage Loss Plan Table - Wage Loss Plan Expense Accounts	WAGES_PLN_TBL2	Define Business Rules, Define Payroll Taxes, Setup, Canadian Wage Loss Plan Tbl, Wage Loss Plan Expense Accounts	Define expense accounts for your company.
Canadian Tax Reporting Table - Canadian Tax Reporting Parameters	CTX_PRC_PARAMETERS	Compensate Employees, Manage Annual Tax Rptg (CAN), Setup, Canadian Tax Reporting Parms	Define Canadian tax reporting parameters used in yearly tax reporting.

Defining Canadian Company Tax Information

Access the Canadian Company Tax Table page.



Canadian Company Tax Table page

Company Tax Information

Prescribed Interest Percent If your company processes low interest loans, enter the current prescribed interest percent. This rate is updated quarterly by the Canadian federal government.

Company Tax Rates

Province Enter all applicable provinces in which the company operates and needs to process PPT tax or override a Health Insurance Rate.

Provincial Premium Tax Percent Enter the provincial premium tax percent applicable to group life and health insurance benefit plan premiums, if your company is responsible for withholding and submitting the tax.

Health Insurance Rate Override Enter the health insurance rate override to specify the premium rate that applies to your company, if that rate is different from the rate defined on the Canadian Tax Table Provincial Rates page. This field applies to companies operating in provinces, such as Ontario and Manitoba, where variable rates apply based upon total gross payroll figures.

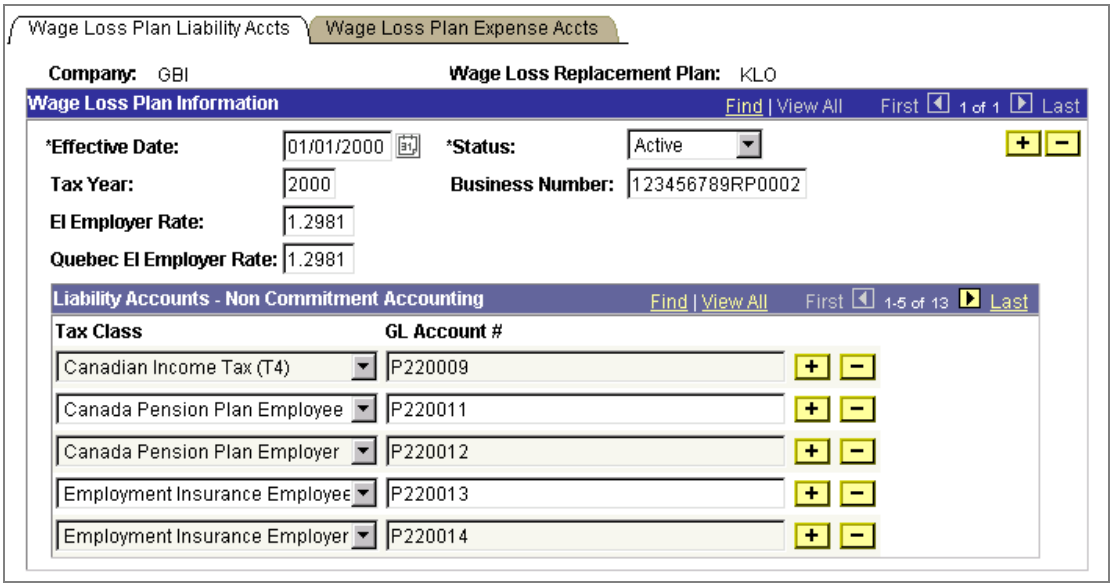
Note. It is your responsibility to update all rates on the Canadian Company Tax Table.

Warning! It is your responsibility to update the **Prescribed Interest Percent** field according to the rate set each quarter by the Canadian federal government. PeopleSoft does not update this field in its tax updates; PeopleSoft leaves the field blank.

Defining Canadian Wage Loss Plans

The Canadian Wage Loss Plan Table identifies valid Canadian wage loss replacement plans. The Wage Loss Replacement Plan field in the Canadian Income Tax Data Table at the employee level is edited against this table. You must create entries on this table before you enter any Canadian tax data for your employees. You must set up at least one entry on the Wage Loss Plan Table for each company. Typically, you create this entry using the default EI Employer Rate and corresponding Quebec EI Employer Rate. You must define additional entries for each wage loss plan your company has registered with CCRA.

Access the Canadian Wage Loss Plan Table - Wage Loss Plan Liability Accounts page.



Canadian Wage Loss Plan Table - Wage Loss Plan Liability Accounts page

Wage Loss Plan Information

Business Number — For each plan you set up, enter your company's unique CCRA Taxation account number in this field. Because a company can have more than one wage loss replacement plan, you can set up any number of plans on this table.

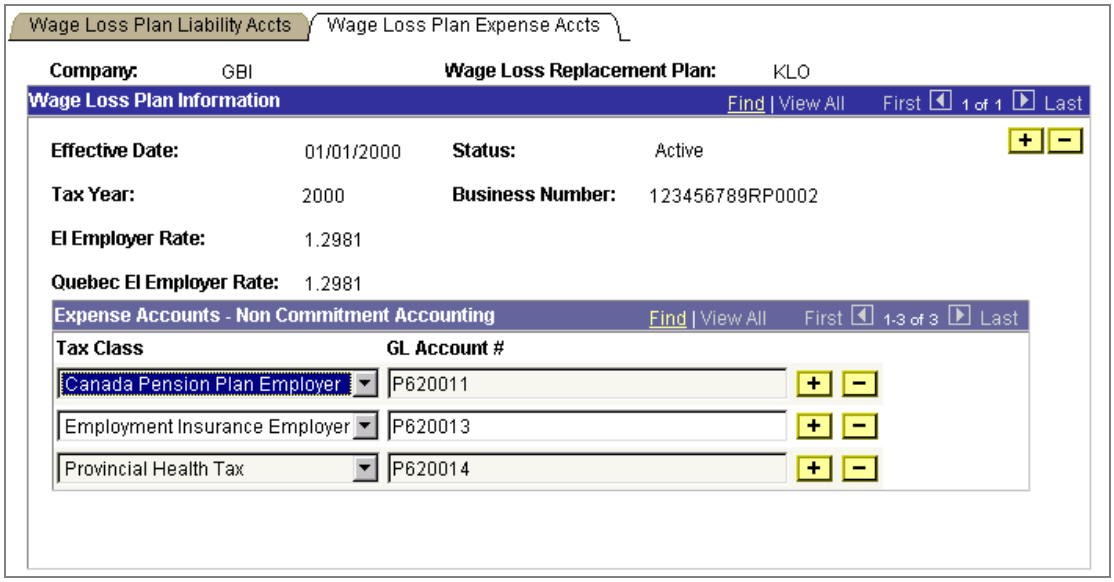
EI Employer Rate — This is the rate of your contribution to Employment Insurance. The default rate (which comes from the Employer EI Premium Rate on the Canadian Tax Table) may be overridden with your specific plan rate.

RCT Acct # — This field is hidden on the page for all entries with an Effective Date of 01/01/1997 or later. The field will be displays and is available for use for all entries dated prior to 01/01/1997 for historical purposes only.

Quebec EI Employer Rate This is the rate of your contribution to Employment Insurance. You can override the default rate (which comes from the Quebec Employer EI Premium Rate on the Canadian Tax Table) by entering your specific plan rate.

Defining Expense Accounts for Your Company

Access the Canadian Wage Loss Plan Table - Wage Loss Plan Expense Accounts page.



Canadian Wage Loss Plan Table - Wage Loss Plan Expense Accounts page

Wage Loss Plan Information

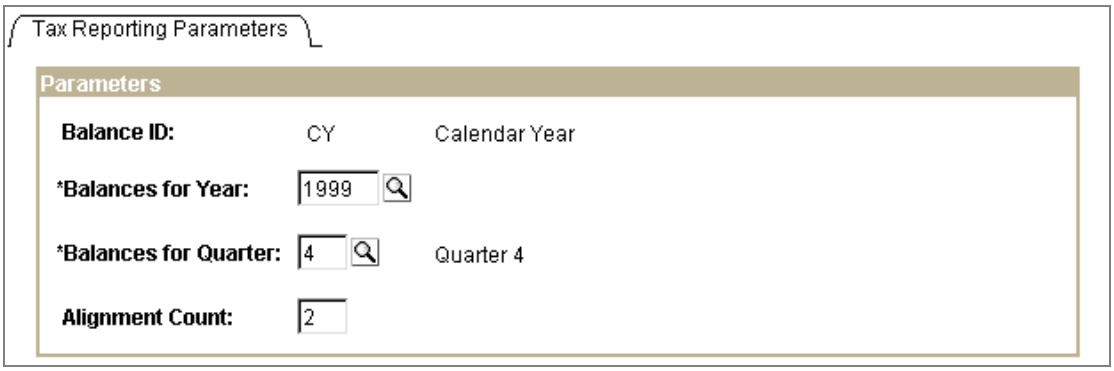
Business Number For each plan you set up, enter your company's unique CCRA Taxation account number in this field. Because a company can have more than one Wage Loss Replacement Plan, you can define any number of plans on this table.

EI Employer Rate This is the rate of your contribution to Employment Insurance. The default rate (which comes from the Employer EI Premium Rate on the Canadian Tax Table) may be overridden with your specific plan rate.

Quebec EI Employer Rate This is the rate of your contribution to Employment Insurance. You can override the default rate (which comes from the Quebec Employer EI Premium Rate on the Canadian Tax Table) by entering your specific plan rate.

Defining Canadian Yearly Tax Reporting Parameters

Access the Canadian Tax Reporting Table - Canadian Tax Reporting Parameters page.



Canadian Tax Reporting Table - Canadian Tax Reporting Parameters page

Balance ID The value you enter here defines the annual reporting period.

Balances for Year The value you enter here defines the annual reporting period.

Balances for Quarter Year-end reporting programs ignore this field.

Alignment Count This field determines how many alignment pages are created at the beginning of the print files. The system multiplies the number of pages by the number of forms per page to determine how many alignment forms to print.

See Also

PeopleSoft Payroll for North America PeopleBook, "Accessing Year-End Processing Instructions"

(CAN) Defining Canadian WCB Assessment Reporting

This section provides an overview of Canadian WCB assessment reporting and describes how to:

- Define WCB assessable earnings.
- Define WCB classifications, rate groups, and assessment rates.
- Associate jobs with provinces, rate groups, and classifications.
- Use the Officer Code Field on the Job Information Page to exclude employees from the workers compensation report.

Understanding Canadian WCB Assessment Reporting

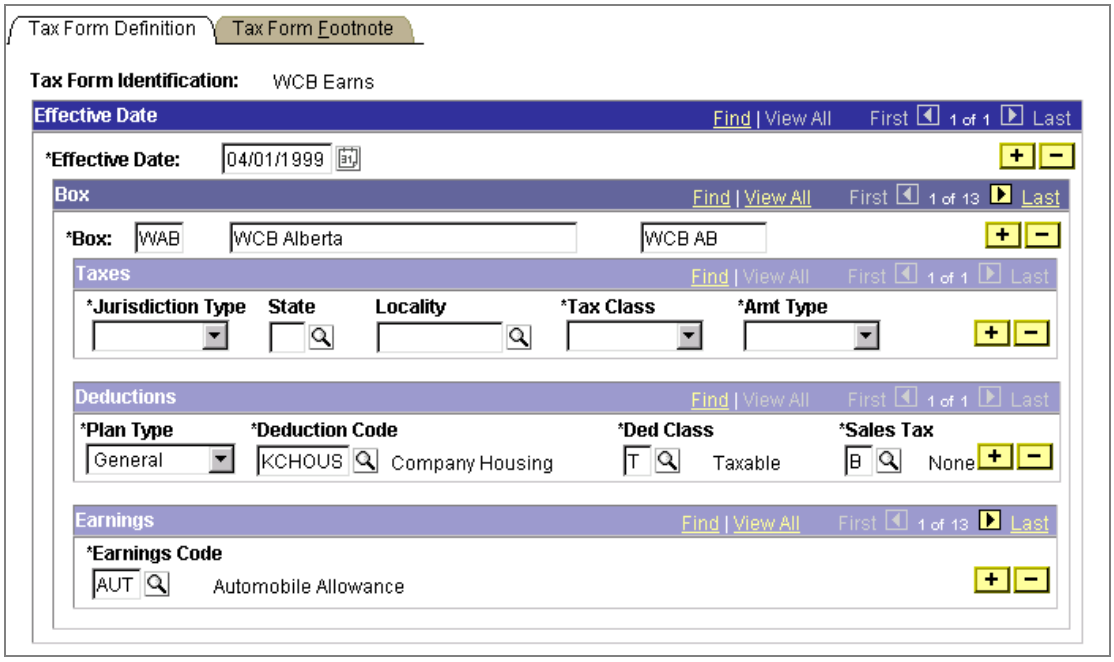
PeopleSoft Payroll enables employers registered with the Workers' Compensation Boards in Canada to report and pay assessments based on the total assessable earnings of their workers. The system accommodates the assessment reporting structures of all provinces. This functionality enables the reporting of assessments by rate groups and classification units.

Pages Used to Define Canadian WCB Assessment Reporting

Page Name	*Object Name*	*Navigation*	*Usage*
Canadian WCB Assessment Reporting Table - Tax Form Definitions	TAXFORM_DEFN_TBL	Compensate Employees, Manage Annual Tax Rptg (CAN), Setup, Tax Form Definitions, Tax Form Definitions	Define WCB assessable earnings.
Canadian WCB Assessment Reporting Table - WCB Classifications	CAN_WCB_CU_RATES	Define Business Rules, Define Payroll Taxes, Setup, Canadian WCB Classifications	Define WCB classifications, rate groups, and assessment rates.

Defining WCB Assessable Earnings

Access the Canadian WCB Assessment Reporting Table - Tax Form Definitions page.



Canadian WCB Assessment Reporting Table - Tax Form Definitions page

To define WCB assessable earnings, you need a new Tax Form ID—WCB Assessable Earnings—and the associated tax form Boxes for each province. The Boxes reflect the two-letter province code, preceded by a W.

You also must define and associate the assessable Earnings and Deduction Codes for each province with the WCB Assessable Earnings Tax Form ID. The Earnings Codes defined as Regular Hours and Overtime Hours on the Pay Group Table are automatically accumulated by the system as assessable earnings without defining them on the Tax Form Definitions page.

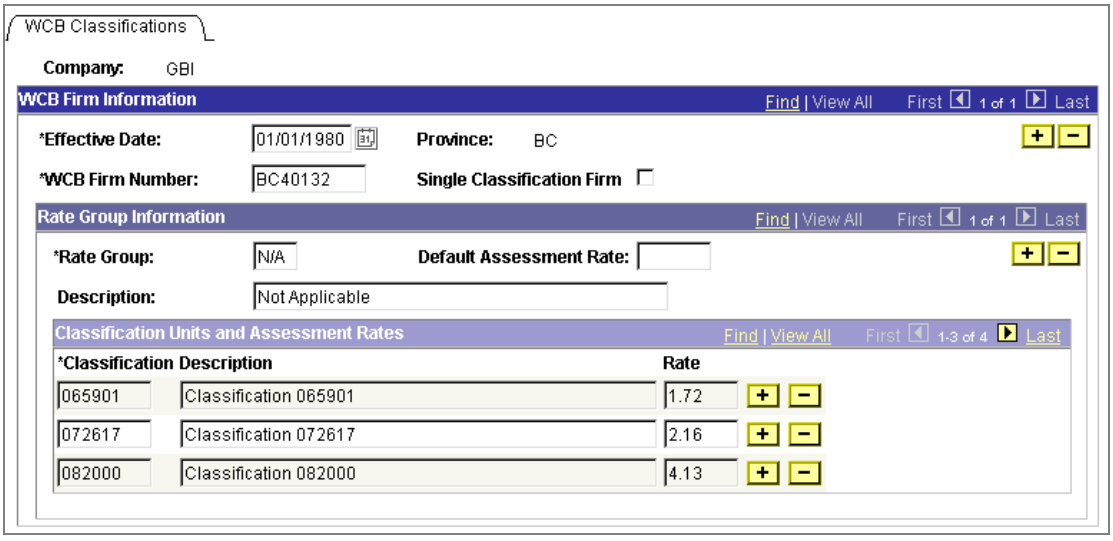
Select the applicable provinces and define the assessable earnings.

Associate the ***WCB Assessable Earnings*** tax form ID with the appropriate **Plan Type, Deduction Code, Ded** (Deduction) **Class, Sales Tax,** and **Earnings Code.**

Note. The earnings codes defined as Regular Hours and Overtime Hours on the Pay Group Table are automatically accumulated by the system as assessable earnings without defining them on the Tax Form Definitions page.

Define WCB Classifications, Rate Groups, and Assessment Rates

Access the Canadian WCB Assessment Reporting Table - WCB Classifications page.



Canadian WCB Assessment Reporting Table - WCB Classifications page

This page can accommodate both a single classification assigned to a single province and multiple Rate Groups associated with multiple classifications (or CUs) for a single province.

WCB Firm Number

Enter the WCB firm number. If a single rate group and/or classification and assessment rate applies to all covered employees in the province, select **Single Classification Firm.**

Single Classification Firm — If this check box is selected, the Workers Compensation report (PAY102CN) uses the entry on this page as the source for reporting assessment information for all covered employees in the province. If this check box is cleared, the information defined on the Job Code Table (WCB Classifications page) 4 is used as the source for reporting.

Rate Group — When adding the original entry for a province, this is set by default to ***N/A.*** If rate groups are applicable to the specified province, override the default by entering the rate group.

Default Assessment Rate — If you enter a default assessment rate, that rate populates into the **Assessment Rate** for each **Classification** assigned to the **Rate Group**.

Description (for Rate Group) — Enter the rate group description, if applicable. Similar to the **Rate Group** field, the description is set by default to ***Not Applicable*** when adding the original entry for a province.

Classification — Define a classification or classification unit (CU).

Assessment Rate — Enter the assessment rate applicable to the classification.

CHAPTER 11

Setting Up Banks and Bank Branches

This chapter provides an overview of setting up banks and bank branches and tells you how to:

- Set up banks and bank branches.
- Specify the source banks.

Understanding Bank and Bank Branch Setup

To set up banks that PeopleSoft HRMS deals with:

1. Set up the bank on the Bank Table page.
2. Specify any bank branches on the Bank/Branch Table page.

   UK customers should refer to (GBR) Setting Up UK Banks and Building Societies for instructions on using the Bank/Branch Info component.
3. Specify the source banks for such processes as payroll, using the Source Bank Accounts page.

Understanding Enterprise Integration Points

When you save changes to the Bank Table, it publishes the Bank Table enterprise integration point (EIP). After HR publishes the data, other products can it, keeping bank information synchronized across applications.

See Also

PeopleSoft Enterprise Integration PeopleBook

Setting Up Banks and Bank Branches

This section describes how to:

- Identify banks.

- Define bank branches.
- (GBR) Set up UK banks and building societies.

Pages Used to Set Up Banks and Bank Branches

Page Name	*Object Name*	*Navigation*	*Usage*
Bank Table	BANK_EC	Define Business Rules, Manage Human Resources (GBL), Setup, Bank/Branch Table, Bank Table	Set up basic information for all financial institutions. You must complete the Bank Table page before you identify a bank with a source bank account.
Branch Table	BANK_BRANCH_EC	Define Business Rules, Manage Human Resources (GBL), Setup, Bank/Branch Table, Branch Table	Define a bank's branches. Not all countries require bank branch information.
Bank Branch Address	BANK_BRA_ADR_SP	Click the Address Information button on the Branch Table page.	Enter the address for a bank branch.

Alternate Navigations for 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 (USF), Setup, Bank/Branch Table, Bank Table

Define Business Rules, Define General Data (NLD), Setup, Bank/Branch Info, Bank Table

Alternate Navigations for Bank 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

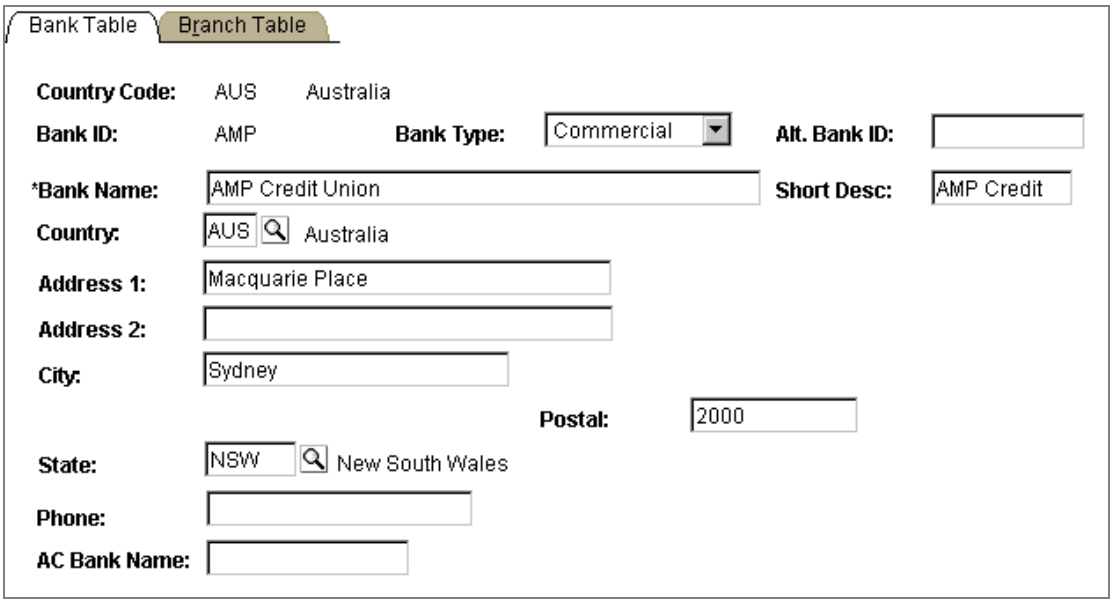
Define Business Rules, Define Global Payroll Rules, Setup 5, Banks, Branch Table

Define Business Rules, Manage Human Resources (USF), Setup, Bank/Branch Table, Branch Table

Define Business Rules, Define General Data (NLD), Setup, Bank/Branch Info, Branch Table

Identifying Banks

Access the Bank Table page.



Bank Table page

Bank ID — System-displayed. There are different formats for each country. Some are numeric, and others are alphanumeric.

Bank Type — Select the type of bank. Values are ***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 is used in international transactions.

AC Bank Name (alternate character bank name) — This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank name in single-byte, Katakana format.

(GBR) Special Considerations for UK Customers

UK customers who are setting up UK bank branches enter the following information:

Country Code — Enter ***GBR.***

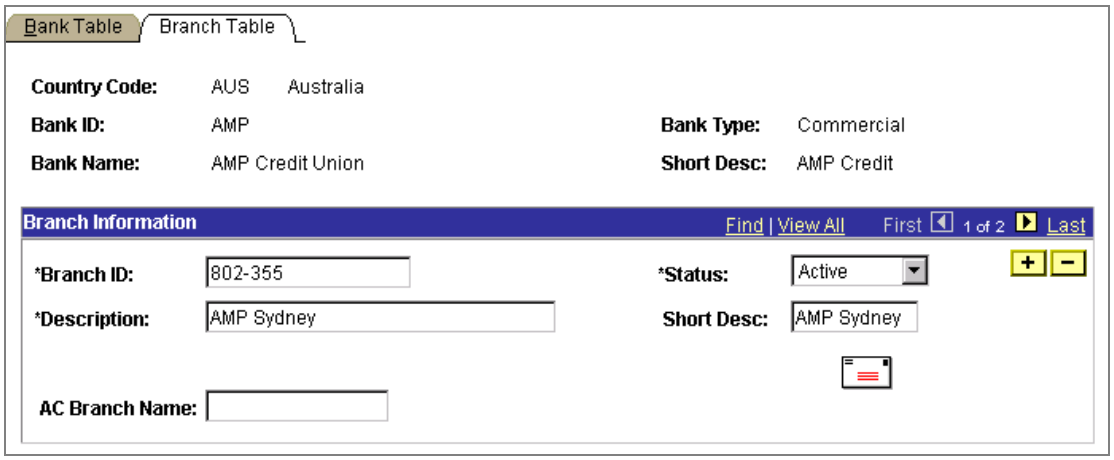
Bank ID — Enter the sort code for the bank branch.

Note. If you're setting up a building society, enter the sort

	code of the bank branch that handles clearing for the building society. Clearing is normally handled by a bank's head office.
Bank Type	Optional for UK banks.
Alt. Bank ID (alternate bank ID)	Leave blank for UK banks.
Bank Name	Enter a description of the branch. Include the location of the branch, not just the bank name.

Defining Bank Branches

Access the Branch Table page.



Branch Table page

Branch ID	Enter the branch ID for the bank. Branch ID formats vary by country.
	Click the **Address Information** button to access the Bank Branch Address page.
AC Branch Name (alternate character branch name)	This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the branch name in single-byte, Katakana format.

(GBR) Special Considerations for UK Customers

UK customers who are setting up UK building societies enter the following information on the Branch Table page:

Bld Soc ID (building society ID)	Enter a unique identifier for the building society.

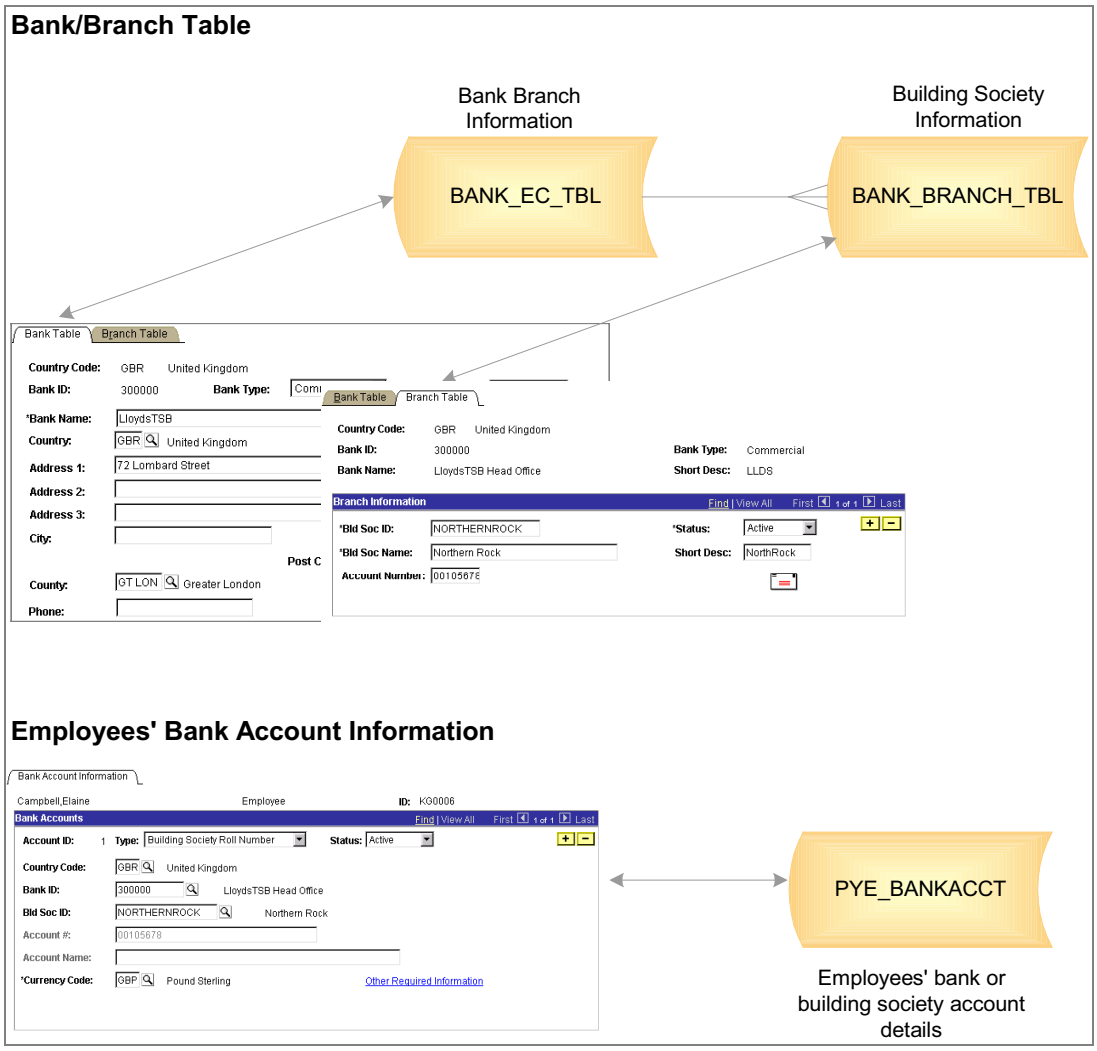
Status	You can enter employee account details only for building societies with an active status.
Bld Soc Name (building society name)	Enter the full name of the building society.
Account Number	Enter the number of the building society's account at the clearing bank.
	Click the **Address Information** button to access the Building Society Address page, where you enter the building society's head office address.

(GBR) Setting Up UK Banks and Building Societies

Below are instructions for setting up the pages in the Bank/Branch Info component for British financial institutions. This setup is required prior to entering employee bank and building society information on the Bank Account Information page.

You must set up every bank or building society that your organization deals with during the course of business. This information is stored in the BANK_EC_TBL and BANK_BRANCH_TBL tables. A third table, PYE_BANKACCT, stores the details of your employees' bank and building society accounts.

The following diagram shows how to set up these tables for UK banks and building societies:



Banking pages and related tables

For UK banks, set up bank branches on the Bank Table page. For building societies, use the Bank Table page to identify the bank branch that handles clearing for the society and the Branch Table page and its associated Building Society Address page to enter the building society details. The following table shows how to complete these pages:

Type of Account	***Bank Table Page***	***Branch Table Page and Building Society Address Page***
Bank Branch	Enter the name, address, and phone number of the bank branch.	Leave blank.
Building Society	Enter the name, address, and phone number of the bank branch that handles clearing for the building society.	Enter the building society name and address and the number of the account that the building society has with the clearing bank that is identified on the Bank Table page.

Warning! You must set up a building society on the Branch Table page, linking the society to its clearing bank on the Bank Table page. If you don't set up building societies as described, the BACS interfaces and processes that are provided by Global Payroll for the UK do not generate valid data.

Specifying Source Banks

Source banks are the money sources that payroll disbursements are drawn from. This section describes how to:

- Define source banks.
- (CAN) (USA) Specify data for banks in the U.S. or Canada.
- (JPN) Specify the account type and company code.

Pages Used to Specify Source Banks

Page Name	*Object Name*	*Navigation*	*Usage*
Source Bank Accounts	SRC_BANK	Define Business Rules, Define Payroll Process, Setup 1, Source Bank Table, Source Bank Accounts	Assign a source bank ID and define information about the banks that pay out money.
US and Canada Bank Additional Data	SRC_BANK_PY_SP	Click the Other Required Information link on the Source Bank Accounts page.	Specify data for banks in the U.S. or Canada.
Japan Bank Additional Data	GPJP_SRC_BANK_SEC	Click the Other Required Information link on the Source Bank Accounts page.	Specify the account type and company code.

Alternate Navigations for Source Bank Accounts

Define Business Rules, Define Payroll Process (USF), Setup 1, Source Bank Table, Source Bank Accounts

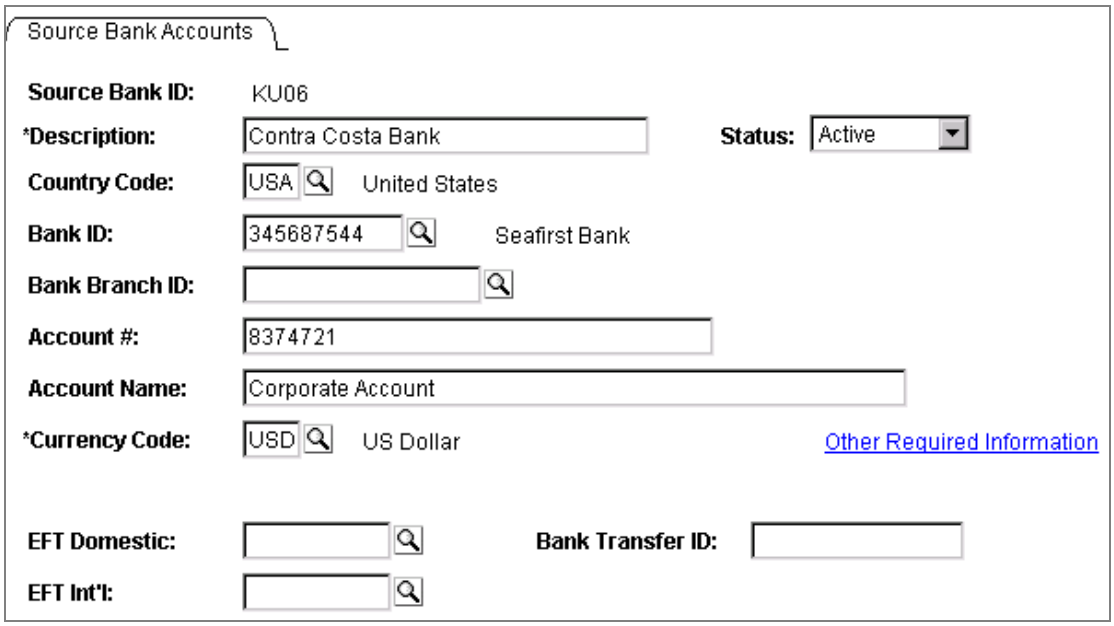
Define Business Rules, Define Global Payroll Rules, Setup 5, Source Bank Accounts, Source Bank Accounts

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

Defining Source Banks

Access the Source Bank Accounts page.



Source Bank Accounts page

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.

Other Required Information — Click this link to access the Additional Data page. Depending on the country extension that you select, you may not have this page. It is used to record information for companies that operate only in the U.S., Canada, or Japan.

AC Account Name (alternate character account name) — This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank account name in single-byte, Katakana format.

EFT Domestic (electronic funds transfer domestic) — Specify which EFT format the source bank account accepts. Enter the EFT name for domestic transactions. If the payee or recipient account is domestic, the default EFT name is taken from the **EFT Domestic** field of the source bank account that you selected. With domestic accounts, the country code is the same as the country code that you selected during installation.

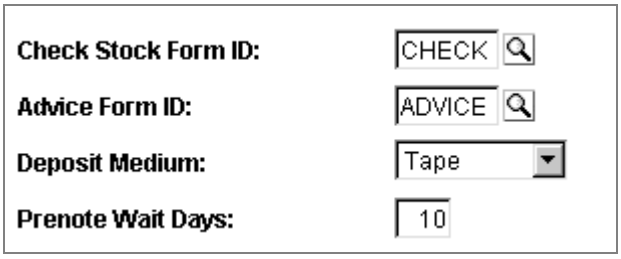
Note. Not applicable in the U.S. or Canada.

EFT Int'l (electronic funds transfer international) — Enter the EFT name for international transactions. If the payee or recipient account is foreign, the default EFT

name is taken from the **EFT Int'l** field of the source bank account you selected. With foreign accounts, the country code is different from the country code that you selected during installation.

(CAN) (USA) Specifying Data for Banks in the U.S. or Canada

Access US and Canada Bank Additional Data page.



US and Canada Bank Additional Data page

The first three fields on this page are identical for both U.S. and Canadian banks.

Check Stock Form ID If your company prints its own checks, identify the print layout and form for this source bank account.

Advice Form ID If your company prints its own advices, identify the print layout and form for this source bank account.

For PeopleSoft Payroll for North America: Select a check stock form ID. When assigning numbers for checks or direct deposits, the Pay Confirmation and Paycheck Reprint processes reference this field to determine which check and advice numbers to use. Before you enter these IDs, define them in the Form Table.

Deposit Medium Specify how transactions are transferred to the bank for processing. Options are ***Tape, EFT*** (electronic funds transfer), ***Diskette,*** and ***Report.***

For PeopleSoft Payroll for North America: This field is for your information only; it does not affect the Payroll process in any way.

(USA) Prenote Wait Days Enter the number of prenote wait days.

When a company makes transfers to a new account (for example, an employee changes the account for automatic deposits), the banks require an initial run with a dummy record to establish that this is a valid (existing) account. The specified waiting period (after the dummy run but before the funds can be transferred to this account) is called the *prenote wait days*.

Note. Allow the prenote process to validate the transit numbers, which you specify at the employee level.

(CAN) Routing Format Enter the routing number.

The routing number specifies how, on the tape or file to the bank, the routing number (bank ID) is presented. The number can have a leading 0 and can vary, depending on whether bank ID or the branch ID comes first.

Select the format to apply to the direct payment routing numbers generated by the Direct Deposit Create File - SQR program DDP001CN. The system uses this format to deposit employees' paychecks directly into their personal bank accounts. Valid values are:

- ***Lead 0, Bank ID, Branch ID.***
- ***Lead 0, Branch ID, Bank ID.***
- ***Bank ID, Branch ID*** (no leading zero).
- ***Branch ID, Bank ID*** (no leading zero).

Direct Deposit Account Number For PeopleSoft Payroll for North America: This field is visible only when an Alternate Bank ID field is present on the Bank Table page. Enter the account number to use for making direct deposits.

(JPN) Specifying the Account Type and Company Code

Access the Japan Bank Additional Data page.



Japan Bank Additional Data page

Account Type The source bank account type. Values are ***Checking*** and ***Regular.***

Company Code The ID that is assigned to the company by the banking institution.

CHAPTER 12

Setting Up Jobs and Pay Groups

This chapter discusses how to:

- Define job function codes.
- Classify jobs.
- Maintain pay groups.

Defining Job Function Codes

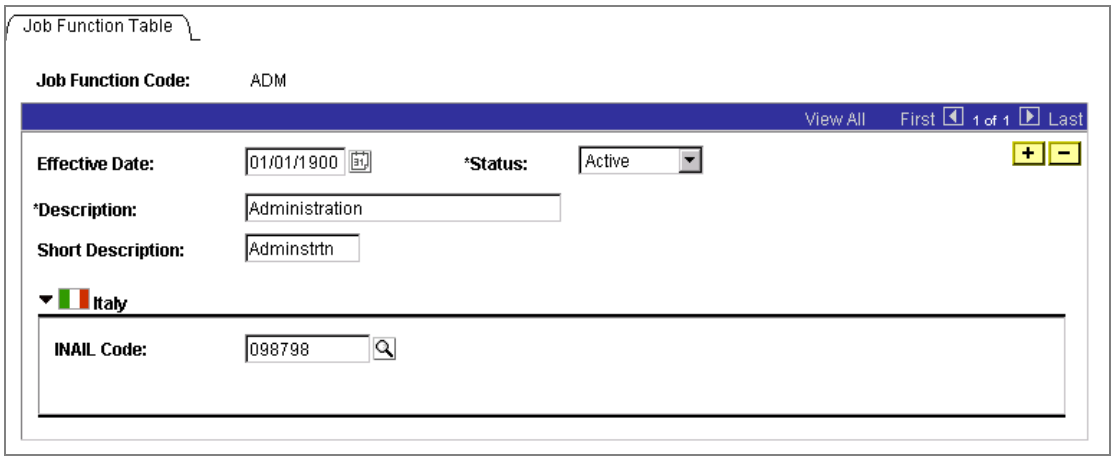
Use job function codes to create function categories that can then be assigned to job codes. For example, you can create a job function code of Finance to describe the function of all job codes that have financial responsibility, such as job codes in accounts payables, accounts receivables, and the controller's office.

Page Used to Define Job Function Codes

Page Name	*Object Name*	*Navigation*	*Usage*
Job Function Table	JOB_FUNCTION_TBL	Define Business Rules, Manage Human Resources (GBL), Setup, Job Function Table, Job Function Table	Set up and define job function codes.

Setting Up Job Function Codes

Access the Job Function Table page.



Job Function Table page

(ITA) Italy

INAIL Code *(Istituto Nazionale per l'Assicurazione contro gli Infurtuni sul Lavoro* code)

The INAIL code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

Classifying Jobs

In PeopleSoft HRMS, you identify jobs by job codes, and you maintain information about jobs independent of the person or group performing that job. For example, you assign salary grades and standard hours to a job regardless of who holds it.

This section describes how to:

- Add new job codes.
- Assign points to job evaluation criteria.
- Enter salary survey information.
- Associate salary plan information and base pay rate codes with a job code.
- Associate non-base rate codes with a job code.

When you save a job code, the system creates a rate code defaulting rule for the salary step, with the Rate Code Source Indicator equal to the job code. The system uses rate code defaulting rules (instead of the Job Code and Salary Step setup tables) for the compensation defaulting.

Understanding Enterprise Integration Points

When you save changes to the Job Code Table, it publishes the Jobcode Table enterprise integration point (EIP). After HR publishes the data, other products can subscribe to it, keeping job codes synchronized across applications.

Understanding Job Codes and Positions in PeopleSoft HRMS

In PeopleSoft HRMS, job codes are different from positions: Within a single job code, you can have a number of positions. For example, you can have a job code representing Administrative Assistant, and within that job code, you can have different Administrative Assistant positions—one in your Marketing department, one in Research, and one in your Compensation group. You use positions to track details on a particular job in a particular department or location. Positions usually have a one-to-one relationship with employees. Job codes have a one-to-many 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.

Note. If you use PeopleSoft Pension Administration, set up jobs, and not positions, for your pension payees.

(JPN) Using Job Codes and Capability Grade Management in Japan

The Job Code field on the Job Details Page of Job Requisition Data is a required field. If your organization has adopted a human resources management system based on capability grade, you may not want to associate a job code with your job requisitions. However, to satisfy the requirements of that page, you need to have a dummy job code that you can enter in the Job Code field. The dummy job code has no processing associated with it. The Job Code Profile page, on which you create the dummy code, has only six required fields, but of these fields, five take default values, so you need to enter only a Job Title. We recommend using a job title that clearly indicates that this is a dummy job code.

See Also

PeopleSoft Enterprise Integration PeopleBook

"Setting Up PeopleSoft HRMS," Driving Your System by Employee or Position

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

Pages Used to Classify Jobs

Page Name	*Object Name*	*Navigation*	*Usage*
Job Code Profile	JOBCODE_TBL1_GBL	Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Job Code Profile	Add new job codes to the system and define job family, compensation, and regulatory information for each job code.
Evaluation Criteria	JOBCODE_TBL2_GBL	Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Evaluation Criteria	Assign points to certain job evaluation criteria. You can use this information to rank job codes in your company and to assess salary grades, steps, and exempt and nonexempt categories for personnel.
Salary Survey Page	JOBCD_SURVEY	Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Evaluation Criteria	Enter salary survey information for this job code.
Default Compensation	JOBCD_COMP_RATE	Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Default Compensation	Associate salary plan information and base pay rate codes with a job code. By associating rate codes with job codes, you define compensation packages that can be associated with a worker's Job record on the Job Information page. For Payroll for North America: Maintain compensation rate codes in the Compensation Rate Code Table in the Define Payroll Process component. You can override some rate code defaults at the job level.

Page Name	Object Name	Navigation	Usage
Non-Base Compensation	JOBCD_NON_BASE	Define Business Rules, Manage Human Resources (GBL), Setup, Job Code Table, Non-Base Compensation	Associate non-base rate codes with a job code.

Alternate Navigations for 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

Define Business Rules, Define Business Rules (FPS), Setup FPS, Jobcode, Job Code Profile

Alternate Navigations for Evaluation Criteria

Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Evaluation Criteria

Develop Workforce, Plan Careers, Setup, Job Code Table, Evaluation Criteria

Define Business Rules, Define Business Rules (FPS), Setup FPS, Jobcode, Evaluation Criteria

Alternate Navigations for Salary Survey

Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Evaluation Criteria

Develop Workforce, Plan Careers, Setup, Job Code Table, Evaluation Criteria

Define Business Rules, Define Business Rules (FPS), Setup FPS, Jobcode, Salary Survey

Alternate Navigations for Default Compensation

Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Default Compensation

Develop Workforce, Plan Careers, Setup, Job Code Table, Default Compensation

Define Business Rules, Define Business Rules (FPS), Setup FPS, Jobcode, Default Compensation

Alternate Navigations for Non-Base Compensation

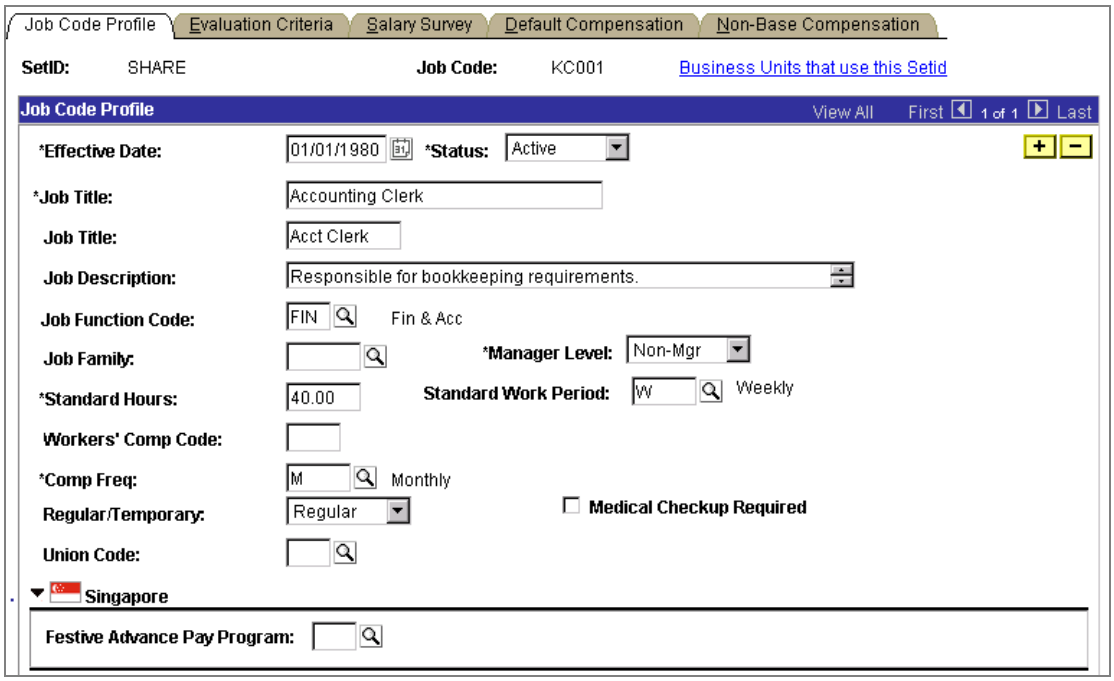
Develop Workforce, Manage Positions (USF), Setup, Job Code Table, Non-Base Compensation

Develop Workforce, Plan Careers, Setup, Job Code Table, Non-Base Compensation

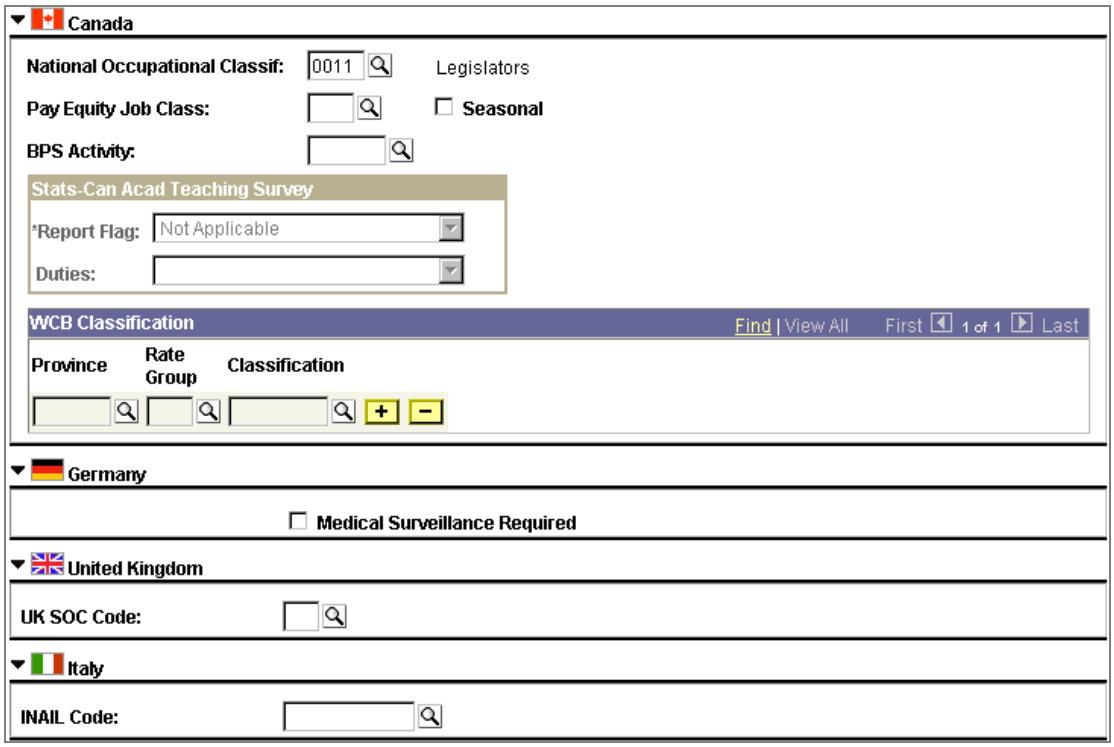
Define Business Rules, Define Business Rules (FPS), Setup FPS, Jobcode, Non-Base Compensation

Adding New Job Codes

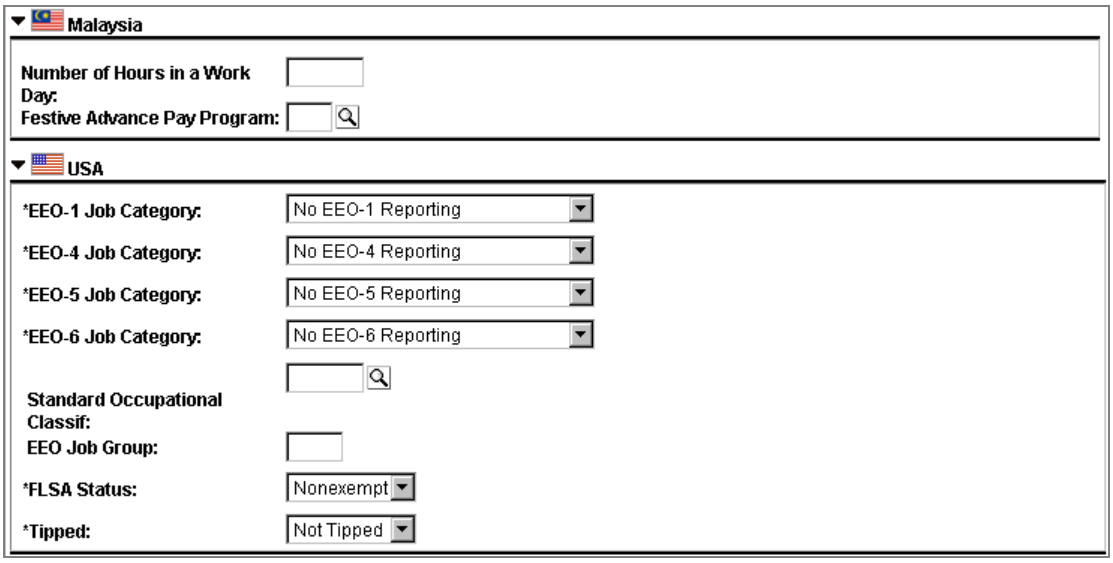
Access the Job Code Profile page.



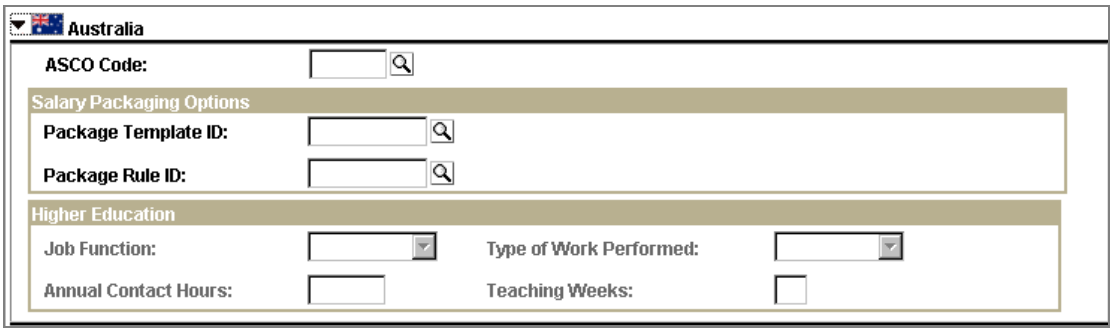
Code Profile page (1 of 5)



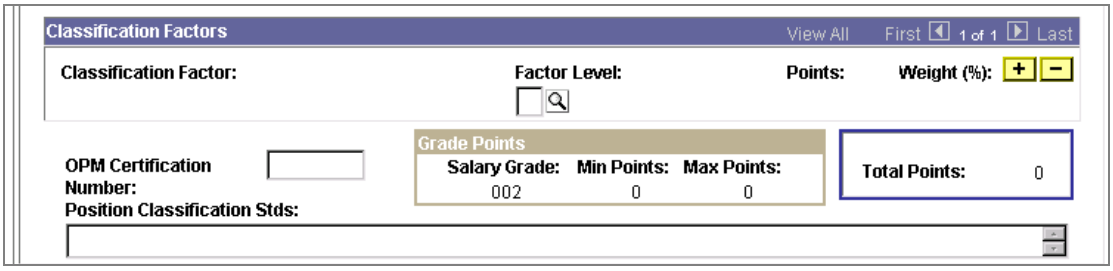
Job Code Profile page (2 of 5)



Job Code Profile page (3 of 5)



Job Code Profile page (4 of 5)



Job Code Profile page (5 of 5)

Job Code A unique code that you associate with a specific job in your organization.

(USF) Occupation Series, Official Posn Title Code (official position title code), and **Organization Posn Title Cd** (organization position title code)	Select from the list.
(GER) (CAN) Job Function Code	Select the code that best categorizes the job by function, such as administrative, legal, or management. This information is used for German and Canadian reporting purposes. If your company uses PeopleSoft Payroll for North America, the Survey of Employment for Educational Institutions report (PAY110CN) uses the **Job Function Code** values ***TCH*** (teacher), ***NTC*** (non-teaching), and ***SUP*** (supply/substitute teachers). **Note.** 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.
Standard Hours	Enter the default number of hours in a normal workweek for this job. The **Standard Hours** value that you enter on this page becomes the default for all employees who are associated with this job code. You can modify the standard hours for an employee on the employee's Job Data pages. The value that you assign for **Standard Hours** must fall between the minimum standard hours and the maximum standard hours defined in the Primary Permission List Preferences Table. If no minimum standard hours and maximum standard hours are defined on the Primary Permission List Preferences Table, the system uses the values on the Installation Table.
Standard Work Period	Select the time period in which employees must complete the standard hours. Maintain these values in 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).
Workers' Comp Code (Workers' Compensation code)	Enter a code to specify the workers' compensation plan to which this job code belongs.

Comp Freq (compensation frequency)
The default value is the frequency that you specified in the Installation Table

Medical Checkup Required
Select if this job code requires a one-time medical checkup when the worker is hired into the job.

Note. If you're tracking a German workforce, also indicate whether the job requires ongoing medical surveillance in the Job Code Profile section for local German functionality, especially if the worker comes into contact with hazardous conditions or materials on the job.

Union Code
If you're defining a job code that is associated with a union, select a union code.

(SGP) Singapore

Festive Advance Pay Program
If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here.

The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods.

This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(CAN) Canada

National Occupational Classif (National Occupational Classification)
Select a Canadian National Occupation classification code.

Seasonal
Select if the job is seasonal.

BPS Activity (Business Payrolls Survey activity)
If you are participating in the Statistics Canada Business Payrolls Survey, select the job code's business activity.

Report Flag
Select the appropriate option if the job code is to be reported in one of the Statistics Canada Academic Teaching Surveys.

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

Duties

Indicate whether the duties of the job code consist of ***Teaching only, Teaching & other resp*** (teaching and other responsibilities), or ***Research.*** This field is required if you selected the **Report Flag** check box.

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

Province

Enter the province that you report to when you perform WCB (Workers' Compensation Board) reporting for this job code. WCB reporting in Canada is always done at the provincial level; there is no national WCB level.

Rate Group

Select a rate group for this job code. Each industry is assigned a rate group for assessment purposes, based on the type of industry and the accident/injury level in that industry in that province.

Classification

Select a WCB classification for this job code. The classification indicates the industry that applies to this job code.

Note. The rate groups and classifications can be obtained from your provincial WCB. The rates and rate codes may vary from province to province.

(GER) Germany

Medical Surveillance Required

Select if ongoing medical surveillance is required for this job code. For instance, some jobs require workers to be in contact with hazardous materials, and health and safety regulations require that workers receive periodic medical checkups as long as they are in that job.

(GBR) United Kingdom

UK SOC Code (United Kingdom Standard Occupational Classification code)

Enter the appropriate UK Standard Occupational Classification code. This code is required for Northern Ireland Community background reporting.

(ITA) Italy

INAIL Code

Select the job code's INAIL code from the list of options. This code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

(MYS) Malaysia

Festive Advance Pay Program

If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here.

The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods.

This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(USA) USA

Union Code

If you're defining a job code that is associated with a union, select a union code. Define union codes as a part of the Manage Labor Relations functionality in PeopleSoft Human Resources.

EEO Job Categories

Select a job category. The EEO-1 code is also the Federal Occupation Category (FOC).

Standard Occupational Classif (Standard Occupational Classification)

If your company has operations in Alaska, you can enter a Standard Occupational Classification (SOC) code for use in unemployment insurance reporting. You enter U.S. SOC codes in the U.S. Standard Occupational Classification Table.

EEO Job Group

To further classify the job categories, enter the EEO job group to which this job belongs.

FLSA Status (Fair Labor Standards Act status)

Enter a code to indicate whether this job is exempt or nonexempt according to the FLSA. This value becomes the default for the FLSA status on all employee job records that are associated with this job code. Example values are ***Administrative, Executive, Nonexempt,*** and ***Professional.***

(AUS) Australia

ASCO Code (Australian standard classification of occupation code)

Select the ASCO code.

Package Template ID / Package Rule ID

Use these fields to associate this job code with the package rules and templates you set up as part of salary packaging for Australia. These IDs act as defaults for this job in employee salary packaging modeling. These fields are also available on the Position Table; the Position Table fields take precedence over the fields here.

By associating templates and rules with job codes, package components are automatically assigned to employees during the package modeling process. Using templates can save time by ensuring that you use the correct template and rule when modeling.

Note. You set up package templates on the Package Template Table page. You set up package rules on the Package Rule Table page.

(AUS) Higher Education

These fields are available when you select the Australian Public Service box on the Country Specific page of the Installation component.

Job Function — Select the default job function for the organization.

Type of Work Performed — Select the default type of work performed for the organization.

Annual Contact Hours — Enter the number of contact hours. This depends on the type of work performed. See "Determining Contact Hours" to calculate this value.

Teaching Weeks — Enter the default number of teaching weeks.

(USF) U.S. Federal

Bargaining Unit — If the job code is associated with a union, select a bargaining unit.

Pay Basis — Enter the pay basis for which you quote salaries for this job code; for example, ***Per Annum, Per Hour.***

Classification Authority and **Classification Factor** — The system displays the classification authority and the classification factors that are associated with the classification standard.

Target Grade — Enter the target grade, if applicable.

Factor Level — Enter a classification factor level for each classification factor that is associated with this classification standard.

Points, Grade Points, and **Total Points** — The system displays the points that are associated with the classification standard.

Weight (%) — The system displays the weight percentage of the points that are associated with the classification standard.

OPM Certification Number (Office of Personnel Management certification number) — Enter the OPM certification number that is associated with this job code.

Position Classification Stds (position classification standards) — Enter the position classification standards that are used.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies

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

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements

PeopleSoft Human Resources PeopleBook: Administer Festive Advance, "(SGP/MYS) Setting Up Festive Advance Pay Programs

PeopleSoft Human Resources PeopleBook: Administer Salary Packaging, "(AUS) Setting Up PeopleSoft Salary Packaging," (AUS) Defining Salary Package Templates

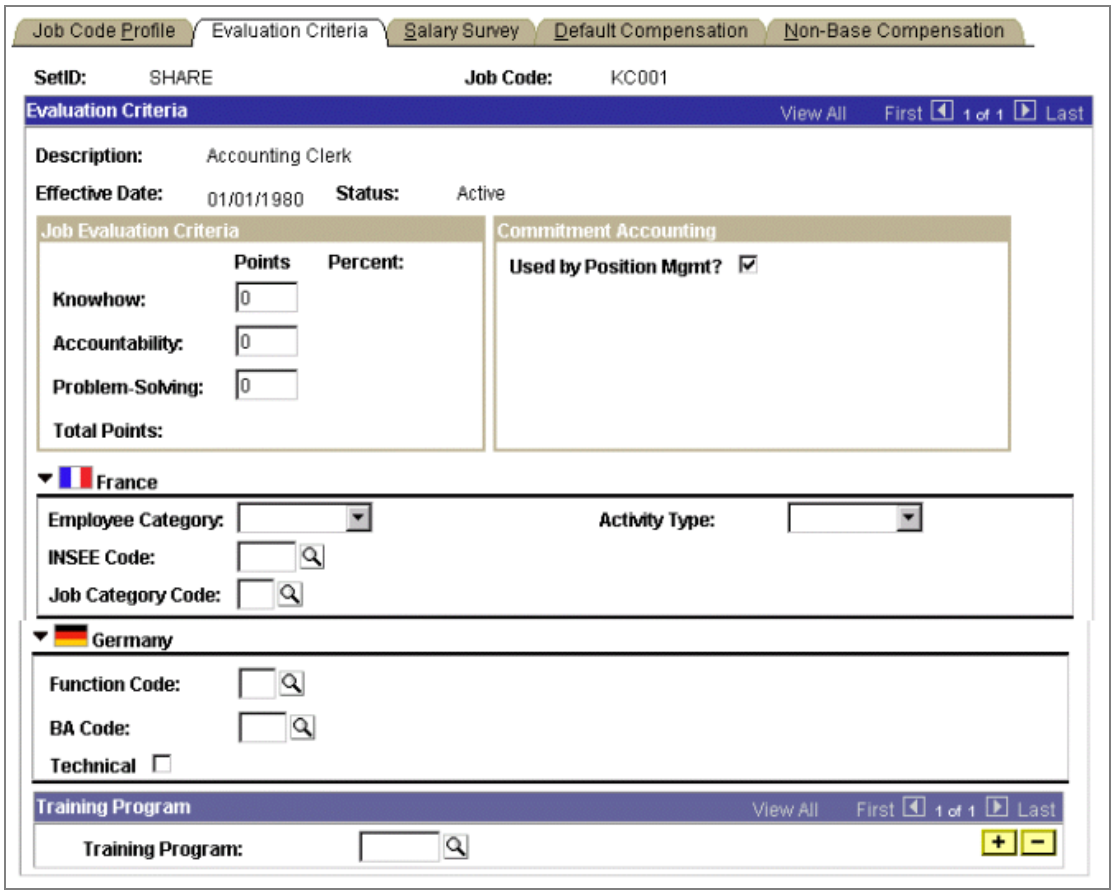
PeopleSoft Human Resources PeopleBook: Administer Salary Packaging, "(AUS) Setting Up PeopleSoft Salary Packaging," (AUS) Creating Salary Package Rules

PeopleSoft Human Resources PeopleBook: Track Faculty Events, "(AUS) DETYA Reporting for the Australian Higher Education Sector," Understanding DETYA Calculations and Reference Dates

PeopleSoft Payroll for North America PeopleBook

Assigning Points to Job Evaluation Criteria

Access the Evaluation Criteria page.



Evaluation Criteria page

Knowhow Enter points that represent the employee's knowledge required to perform the job.

Accountability Enter points that represent 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 know-how, accountability, and problem solving for this job, the higher the points. For example, you would probably assign more accountability points to a controller than to a secretary because the controller has more responsibility.

The system calculates **Total Points** and the **Percent,** or relative importance, of each factor. For example, if **Knowhow** receives 33.2 percent of the total points, **Accountability** receives 33.7 percent, and **Problem-Solving** receives 33.1 percent, then all three factors are almost equally important.

However, if **Knowhow** receives 54.4 percent of the total points, **Accountability** receives 9.2 percent, and **Problem-Solving** receives 36.4 percent, then **Knowhow** is of greater importance than **Accountability** or **Problem-Solving,** and **Accountability** is of little significance.

Used by Position Mgmt? (used by position management?)

Select if this job code is used by a position. If you specified full or partial position management on the Installation Table, this check box is selected by default.

A selected check box tells the system that you're budgeting for the job code at the position level. It does not restrict your ability to attach positions to a job code or attach employees to a job code. If this check box is clear, you can still set up a position with the job code. If the check box is selected, you can still enter the job code on the employee's job data record.

When you clear this check box, the **Pre-Encumbrance Indicator** and **Encumber Salary Option** fields appear.

Pre-Encumbrance Indicator

Indicate if you want the system to encumber this job code immediately (***Immediate***), not at all (***None***), or upon requisition (***Requistn***).

Encumber Salary Option

If you are using Commitment Accounting to encumber salaries, the system uses the option that you select to determine the salary amount when it encumbers the salaries of vacant positions.

(FRA) France

INSEE Code

Link this job code to an INSEE code for use in the French Disability report.

Job Category Code

Select a job category code, required for Single Requirement reporting.

(GER) Germany

BA Code (*Bundesanstalt fuer Arbeit* code)

Select this job code's BA code, if applicable.

Technical

Select if this job code is technical.

Training Program

Training Program

You can associate a training program with this job code, which you'll find helpful in career planning. When you set up training and development programs for employees in this job code, you can use the default training program as the basis for an individual career-training plan.

See Also

"Setting Up PeopleSoft HRMS," Driving Your System by Employee or Position

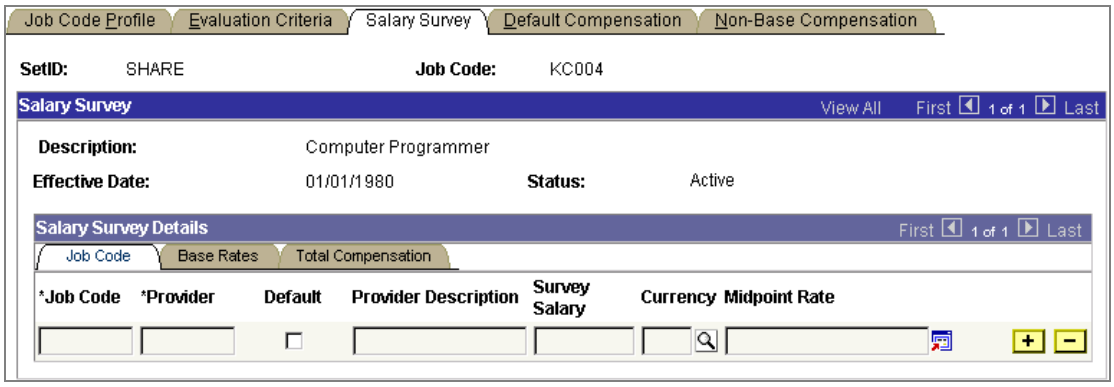
PeopleSoft Human Resources PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs"

PeopleSoft Human Resources PeopleBook: Plan Careers and Successions, "Planning Careers"

Entering Salary Survey Information

Access the Salary Survey page.



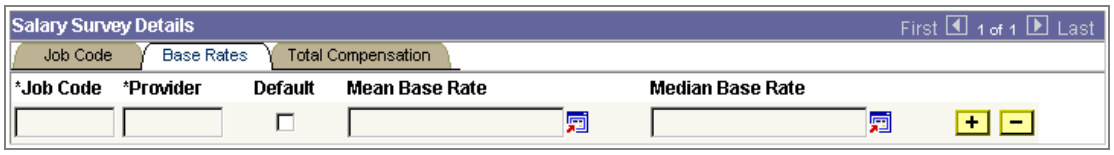
Salary Survey page: Job Code tab

Job Code Tab

Job Code Enter the salary survey job code used by the salary survey providers.

Provider Enter the provider of this salary survey.

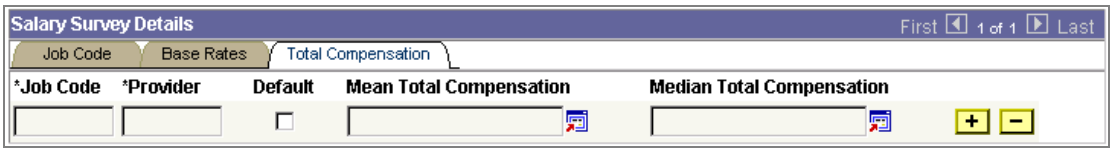
Default Indicate if this salary survey is the default for this job code.



Salary Survey page: Base Rates tab

Base Rates Tab

Mean Base Rate and **Median Base Rate** Enter the mean and median base rates of the surveyed salary.



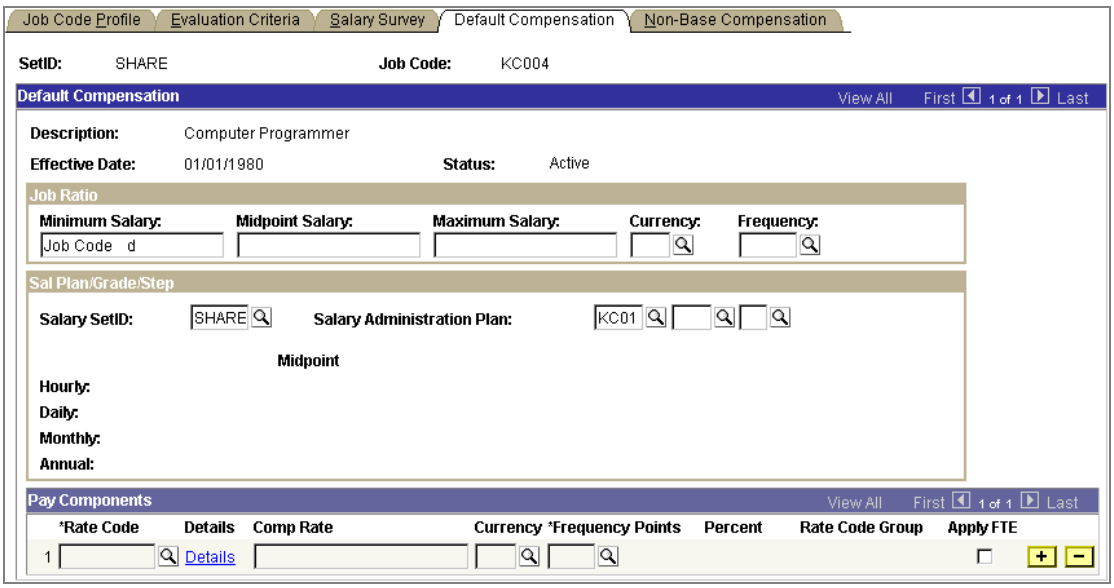
Salary Survey page: Total Compensation tab

Total Compensation Tab

Mean Total Compensation and **Median Total Compensation** — Enter the mean and median total compensation of the surveyed salary.

Associating Salary Plan Information and Base Pay Rate Codes With a Job Code

Access the Default Compensation page.



Default Compensation page

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.

Job Ratio

The job ratio calculates comparative salary information for employees who perform similar work activities in countries where plan/grade/step data is used to support industrial tariffs. If you use plan/grade/step data for job-related activities, you do not need to use the Job Ratio fields.

The employee's comp rate (as specified on the Compensation page of the Job Data component) is converted to the currency and frequency defined in the Job Ratio group box. The result is divided by the job code midpoint salary.

Minimum Salary, **Midpoint Salary**, **Maximum Salary**, **Currency**, and **Frequency**

Enter the minimum, midpoint, and maximum salary amounts according to the frequency (which appears by default from the Job Code Profile page but can be overridden here) that is available to this job code. Indicate the currency of the salary amounts if it is not the same as the default.

Sal Plan/Grade/Step (salary plan/grade/step)

If your company has established compensation programs, select the codes that represent the default salary plan/grade/step for this job. You define these codes in the Salary Plan Table, the Salary Grade Table, and the Salary Step Table.

Salary Administration Plan

Select a salary plan (and additional salary planning information) and step. Select a grade. The system populates the rest of the Salary Administration Plan fields on the page with hourly, monthly, and annual midpoint pay rates that are associated with the grade.

The salary administration plan that you enter is used as the employee default if you have not associated salary administration plans with locations in the Location Table.

No matter where the salary administration plan draws its default, when you select job codes for employees on the Job Data pages, the salary grade and step always reflect the values entered here.

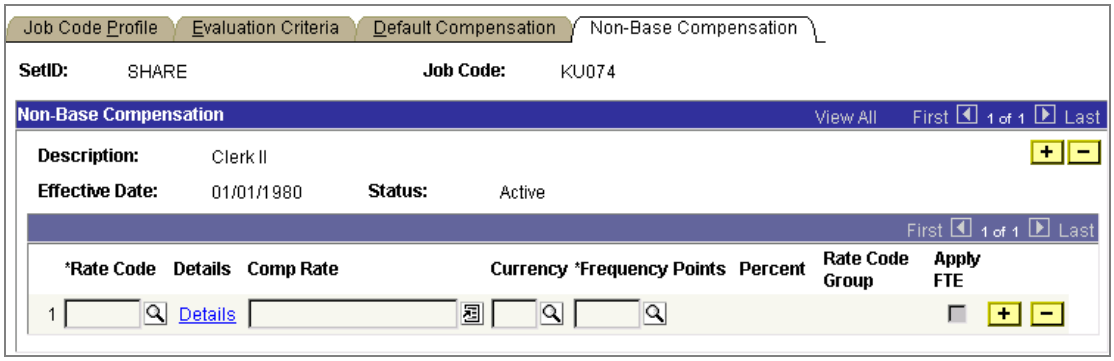
See Also

PeopleSoft HRMS PeopleBooks Preface, Entering or Viewing Pay Components

PeopleSoft Human Resources PeopleBook: Plan Salaries, Setting Up Salary Plans, Grades, and Steps

Associating Non-Base Rate Codes With a Job Code

Access the Non-Base Compensation page.



Non-Base Compensation page

The system doesn't use non-base pay rate codes as default values on any HRMS pages. The codes are used for payroll processing.

Details	Click to review the description, comp rate type (compensation rate type), and rate code class that are associated with the rate code.
Frequency	The system displays the compensation frequency of the rate code as the default frequency. Rate code frequency is defined on the Comp Rate Code Table page.
Apply FTE (apply full-time equivalency)	Select to indicate that the compensation rate for this rate code is multiplied by the FTE in calculating the job compensation rate.
Points	The system displays the points that are associated with this rate code, if applicable.
Percent	If the rate code type for this rate code is *Percent,* the system displays the percent that is to be applied to the job compensation rate or to a rate code group.

Note. Column order for grids may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar as necessary to view all the columns.

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. 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 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 default field values on the Administer Workforce pages are based on the pay group values that you specify in this table. Set up at least one pay group for each company that you established in the Company Table (or the Agency Table, for U.S. federal users).

This section describes how to:

- Set up and describe pay groups.
- Establish employee type options for employees in a particular pay group.
- Define further payroll processing parameters for pay groups.
- (USA) Define FLSA periods.
- (E&G) Enter additional E&G earnings codes.

Setting Up Your Pay Group

Where you set up your pay group depends on which payroll application you use:

- If you use PeopleSoft Payroll for North America or if you aren't using a PeopleSoft payroll application at all, use the Pay Group Table discussed in this section.
- If you use PeopleSoft Global Payroll, use the Pay Group component in that application.

If you use PeopleSoft Pension Administration, also set up pay groups for your pension payee companies. PeopleSoft Pension Administration doesn't use pay groups for paying pension benefits.

Note. If you use both PeopleSoft Global Payroll and PeopleSoft Payroll for North America, set up both types of pay groups. Otherwise, define only the pay groups for the application that you use.

Using the Pay Group Table

The Pay Group Table consists of nine pages. The component in the Manage Human Resources menu has only the first three pages: All nine pages are under the Define Payroll Process menu. For PeopleSoft Human Resources, enter information only on the first three pages of the Pay Group Table, because that information is used across all applications of PeopleSoft HRMS. The last six pages in the page group are only for PeopleSoft Payroll for North America.

(USF) Note. 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 is under the Define Payroll Process menu.

Note. The pay groups that you define are used only for PeopleSoft Payroll for North America.

See Also

PeopleSoft Global Payroll PeopleBook

PeopleSoft Payroll for North America PeopleBook

PeopleSoft Payroll Interface PeopleBook

Pages Used to Maintain Pay Groups

Page Name	*Object Name*	*Navigation*	*Usage*
Definition Page	PAYGROUP_TABLE1	Define Business Rules, Manage Human Resources (GBL), Setup, Pay Group Table, Definition	Set up and describe pay groups.
Process Control Page	PAYGROUP_TABLE2	Define Business Rules, Manage Human Resources (GBL), Setup, Pay Group Table, Process Control	Establish employee type options for a particular pay group.
Calc Parameters (calculation parameters)	PAYGROUP_TBL3_GBL	Define Business Rules, Manage Human Resources (GBL), Setup, Pay Group Table, Calc Parameters	Define further payroll processing parameters for pay groups.
FLSA Period Subpanel		Click FLSA Period Definition on the Calc Parameters page.	Define FLSA periods.
Education and Government Additional Earnings Codes		Click Addl Educ/Govt Earnings Codes on the Calc Parameters page.	Add earnings codes for education and government.

Alternate Navigations for Pay Group Table - Definition

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 (USF), Setup, Pay Group Table, Definition

Alternate Navigations for Pay Group Table – Process Control

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 (USF), Setup, Pay Group Table, Process Control

Alternate Navigations for Pay Group Table – Calc Parameters

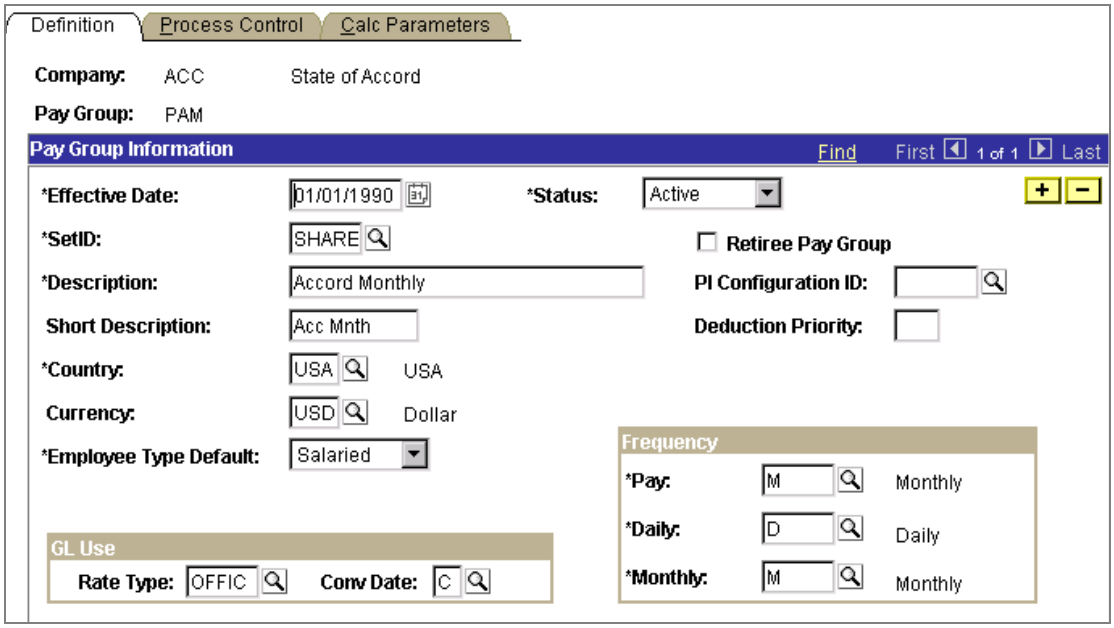
Define Business Rules, Define General Data (NLD), Setup, Pay Group Table, Calc Parameters

Define Business Rules, Manage Human Resources (USF), Setup, Pay Group Table, Calc Parameters

Setting Up and Describing Pay Groups

Access the Definition page.

Note. This page is not on the Manage Human Resources (USF) - Pay Group Table.



Definition page

Pay Group The **Pay Group** value that you specified in the entry dialog box is displayed.

Note. On employee job records, the Pay Group default is from the company level.

SetID Select a setID for the shift table used by the employees in this pay group. For pay groups that don't use a shift table, use a generic setID.

Retiree Pay Group — Select for a separate retiree pay group. PeopleSoft recommends keeping retirees in their own pay group. There is no processing associated with this check box.

PI Configuration ID (payroll interface configuration ID) — If appropriate, select a payroll interface configuration ID. The **PI Configuration ID** is used by the PeopleSoft Payroll Interface application.

Deduction Priority — Enter a deduction priority number for your pay group. The deduction priority is used for multiple job employees when the single check option is not selected for a company.

Employee Type Default — Select the most common employee type within the pay group. The system uses this value as the default for the pay group's employee job records. The default you enter on this page is edited against the Benefit/Deduction Program Table in the Administer Base Benefits page. You need either to set up that table first or leave this field blank for now. Values are as follows:

Salaried: Select for employees whose earnings are based on an amount per pay period, rather than accumulated hours. You can still enter exceptions on the pay sheets.

Hourly: Select for employees who don't work the same number of hours each pay period. Typically, an hourly employee requires positive time reporting. In this case, you enter the hours worked on the pay sheets.

Exep Hrly (hourly exceptions): Select for employees who work a set number of hours each pay period. Enter only exceptions to their schedule on the pay sheets.

Not Appl (not applicable): Select if this field isn't applicable.

(CAN) Wage Loss Plan Default — Specify a wage loss plan default value for the pay group. This default value assigns employees the appropriate wage loss plan on the Canadian Income Tax Data page whenever the system automatically creates employee tax data records.

Frequency

Daily — Select the frequency used by PeopleSoft Human Resources to calculate the daily rate on the Compensation page of the Job Data component. Only frequencies on the Frequency Table with a frequency type of daily are available for selection.

Monthly — Select the frequency to calculate a monthly rate, used by PeopleSoft Human Resources and PeopleSoft Global Payroll or Payroll for North America. Only frequencies on

the Frequency Table with a frequency type of monthly are available for selection.

General Ledger Use

PeopleSoft General Ledger uses these fields.

Rate Type — Values are ***Commercial Rate, Financial Rate, Floating Rate, Freemarket Rate, Global Payroll, Official Rate,*** and ***Spot Market Rate.***

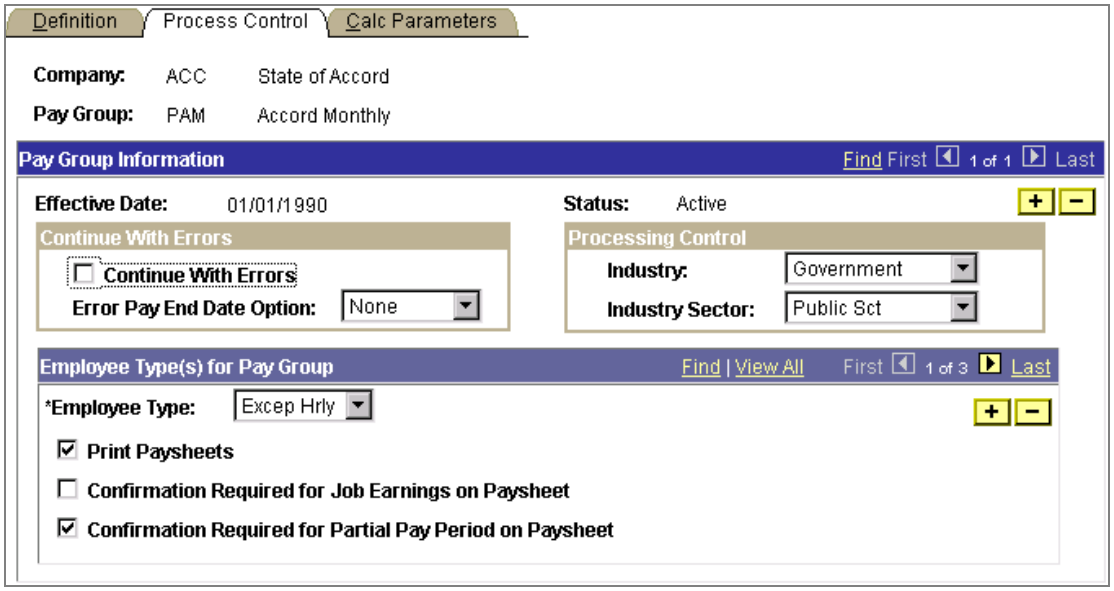
Conv Date (conversion date) — Values are ***Check Date, Pay End Date,*** and ***Today's Date.***

See Also

PeopleSoft Payroll for North America, "Defining Deductions," Setting Up Deductions

Establishing Employee Group Options for a Pay Group

Access the Process Control page.



Process Control page

You establish options on this page before you assign employee types on employee records. For example, you might want to group only salaried employees in your monthly pay group and group hourly and exception hourly employees in a biweekly pay group.

(USF) Note. This page isn't on the Manage Human Resources (USF) - Pay Group Table.

Continue With Errors

Continue With Errors Select to enable the Pay Confirmation process to continue processing even if it encounters calculation errors. The system moves the items in error to off-cycle paysheets 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. Select the date of the off-cycle calendar to which erred paysheets are moved.

If you select ***Next Day,*** the Pay Calendar Creation process creates one cycle pay calendar for each on-cycle pay calendar that is created. The pay end date for the off-cycle calendar is one day after the pay end date for the on-cycle pay calendar. For example, if the pay end date for the on-cycle calendar is May 31st, the pay end date for the off-cycle calendar is June 1st.

Warning! If you enter your own end date, you must ensure that a pay calendar has been built for that date before attempting to calculate transferred pay lines.

Processing Control

Industry Sector Select ***None, Core, Public Sct*** (public sector), or ***US Federal.***

Employee Type(s) for Paygroup

Employee Type Select the options—***Hourly, Exception Hourly,*** or ***Salaried***—that are valid for this pay group. If you use PeopleSoft Payroll for North America, you also need to designate payroll processing parameters. Otherwise, for employees being paid with PeopleSoft Payroll for North America, leave **Print Paysheets** selected as the default.

Note. If a specific employee type is not defined on a pay group, a user can't set up that type of employee. For example, if a pay group does not have an employee type of salaried, when an employee is hired, the user can't enter S as the employee type on job.

Print Paysheets If you are using PeopleSoft Payroll for North America, select this check box if the employees in this employee type should always be included when printing paysheets. Employee types for which this check box is cleared still appear on the paysheet pages.

Note. You must check this box if either of the confirmation required check boxes is selected.

Confirmation Required for Job Earnings on Paysheet If you are using PeopleSoft Payroll for North America, select this box to clear the OK to Pay field on the

paysheets by default. OK to Pay tells the system whether to pay an employee or place the record on hold until you review it. Pay Calculation, in turn, processes only those employees who have OK to Pay selected. If you select this option, Print Paysheets must also be selected.

Typically, hourly employees require some sort of positive time input to get paid. For this reason, you might say that confirmation is required. Once you enter their time on the paysheets, you manually select OK to Pay to permit them to be paid.

For exception hourly and salaried employees, you usually enter exception time only as required. Therefore, you might indicate that confirmation is not required. These employees automatically get paid their regular salary or hours each pay cycle, because the paysheets are created with the OK to Pay check box selected.

Confirmation Required for Partial Pay Period on Paysheet

If you are using PeopleSoft Payroll for North America, select this box to control the **OK to Pay** check box on the paysheet. Whenever there is a mid-period change on the Job record—an employee is hired, is terminated, or changed jobs or pay rates—the system creates partial pay period records due to proration. Typically, if you prorate pay, you should clear this check box to tell the system that confirmation is not required and to select OK to Pay on the paysheet. If, on the other hand, you want to manually verify the proration for employees, select this option. You can adjust the pay on the paysheets and click the OK to Pay check box. If you select this option, Print Paysheets must also be selected.

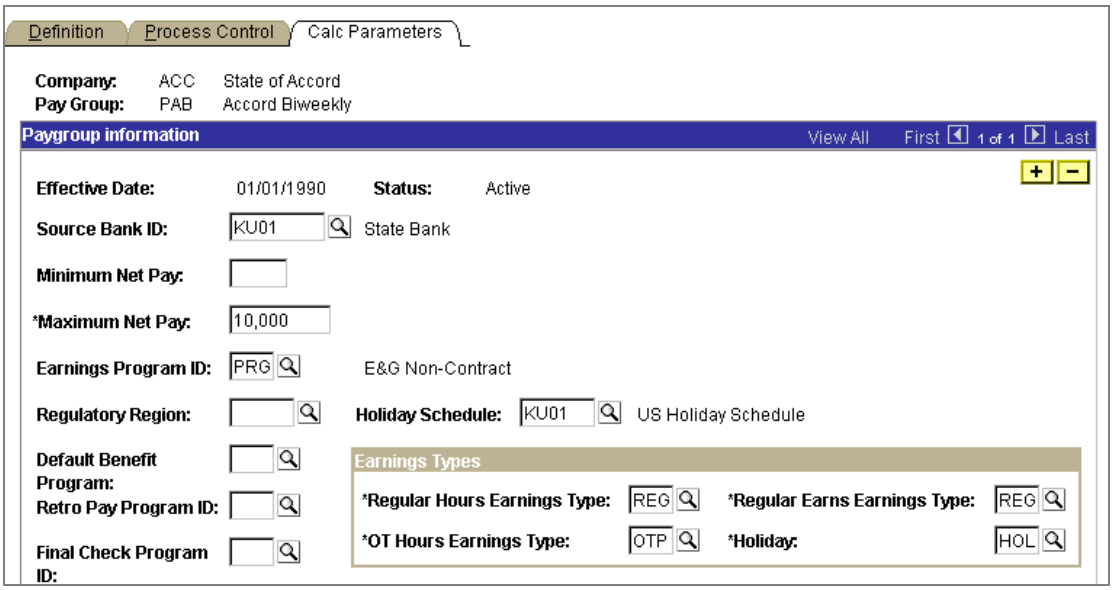
See Also

PeopleSoft Payroll for North America, "Working with Paysheets"

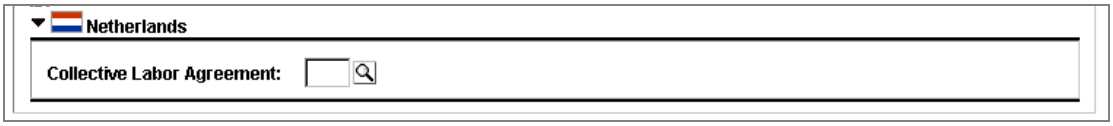
Defining Further Payroll Processing Parameters for Pay Groups

Access the Calc Parameters page.

The Calc Parameters page is slightly different depending on which menu you use to access it. The screen shot below is from the page as accessed from the Manage Human Resources menu.



Calc Parameters page (1 of 2)



Calc Parameters page (2 of 2)

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 pay 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 pay group.

Earnings Program ID The value you enter appears as the default in employee job data.

If you use PeopleSoft Benefits, you must select an earnings program ID.

Regulatory Region Enter the regulatory region that is associated with this pay group, if any.

Holiday Schedule Select a holiday schedule (optional). The value you enter appears as the default in employee job data.

The default you enter on this page is edited against the Holiday Schedule Table under the Define Payroll Processes menu. You need to set up that table first or leave this field blank for now.

Default Benefit Program — Select the default benefit/deduction program for the pay group, used as the default for the employee's Job record. The default you enter on this page is edited against the Benefit/Deduction Program Table in the Administer Base Benefits menu. You must set up that table first, or leave this field blank for now.

Retro Pay Program ID (retroactive pay program ID) — If you use PeopleSoft Payroll for North America, select a retro pay program ID that identifies the earnings code to be used in retro pay calculations.

Final Check Program ID — If you use PeopleSoft Payroll for North America, select a final check program ID that identifies the earnings, deductions, and accruals to be used in final check processing for the pay group.

(USA) FLSA Required (fair labor standards act required) — For U.S. payroll processing, select **FLSA Required** if FLSA regulations are to be applied to this pay group (you must have first enabled FLSA processing at the company level on the Fica/Tax Details page, accessed from the Default Settings page of the Company component). When you select the **FLSA Required** check box, the system displays the **FLSA Period Definition** link.

Note. In order to be included in FLSA calculations, an employee must have non-exempt status and belong to an FLSA pay group.

Note. If FLSA is required for a whole agency or for most pay groups in an agency, clear the **FLSA Required** check box and define FLSA requirements on the Agency Table. If **FLSA Required** isn't selected on the Agency Table, the FLSA rule for a pay group defaults to **Higher of FLSA Contractual.**

FLSA Period Definition — Click to access the FLSA Period Definition page.

Earnings Types

Regular Hours Earnings Type and **OT Hours Earnings Type** (overtime hours earnings type) — If you use PeopleSoft Payroll for North America, select the regular and overtime hours earnings types.

Regular Earns Earnings Type — If you use PeopleSoft Payroll for North America, select the regular earnings type.

Holiday — If you use PeopleSoft Payroll for North America, select the appropriate value.

When paysheets are created and the system detects that a holiday falls within the pay period, it uses this earnings code. If Holiday Type on the Holiday Schedule Table is

	Canadian, the system uses this value to set up the statutory holiday earnings on the paysheet.
(CAN) Holiday (Non-Statutory)	If you're using the Canadian PeopleSoft Payroll application, the system refers to Holiday (Non-Statutory) when paysheets are created, depending on whether the holiday is statutory or non-statutory earnings.
Addl Educ/Govt Earnings Codes (additional education/government earnings codes)	Click to access the Education and Government Additional Earnings Codes page.

(NLD) Netherlands

Collective Labor Agreement	Enter the appropriate collective labor agreement, if applicable.

See Also

Processing Transactions Using Regulatory Regions

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes", Establishing Retro Pay Programs

PeopleSoft Payroll for North America PeopleBook, "Processing Retro Pay"

PeopleSoft Payroll for North America PeopleBook, "Calculating Pay", Calculating FLSA Rates

(USA) Defining FLSA Periods

Access the FLSA Period Subpanel page.

This page is only available when you access the Pay Group table from the Define Payroll process menu.

FLSA Period Definition	Select the appropriate FLSA period definition from the following options: ***Fixed FLSA Period:*** 7 or 14 days. 7 is the default. ***Fire Protection:*** 7 to 28 days. ***Law Enforcement:*** 7 to 28 days. If you select ***Fixed FLSA Period***, the period can only be for 7 or 14 days. There are no FLSA threshold hours for employees in the ***Fixed FLSA Period***, because threshold hours only apply to law enforcement and fire protection employees.

Fixed Salaried Hours	Uses the standard hours (per week) you entered on the employee's Job record. If you select **Fixed Salaried Hours,** the **Use Basic Formula** check box appears.
Use Basic Formula	If you select this check box, the **FLSA Calendar ID** and **FLSA Period in Days** check boxes become unavailable. Basic formulas are used only for monthly and semi-monthly pay periods. The FLSA period is assumed to be the same as the pay calendar period; hence, no FLSA calendar ID is required. If you select **Use Basic Formula,** you must enter information into the Work Day Hours field on the Job Information page.
Unspecified Salaried Hours	The actual number of hours worked per week by salaried employees is used to determine their FLSA rate.
FLSA Calendar ID	The FLSA calendar ID is linked to the FLSA Start Date and FLSA Period in Days fields on the FLSA Calendar Table page, which are used to define the FLSA begin and end dates. Hence, the pay group uses the FLSA calendar ID to define the FLSA periods. This field is not applicable if you select **Basic Rate Formula.** If you select **Fixed FLSA Period,** the prompt list only contains FLSA calendar IDs with 7 or 14 FLSA periods in days. For fire protection or law enforcement, the prompt list contains FLSA calendar IDs from 7 to 28 days.
FLSA Period in Days	Displays the length of the FLSA pay period, or the days from the FLSA begin date to the FLSA end date. It is based on the FLSA period in days you define on the FLSA Calendar Table.
FLSA Threshold Hours	The number of hours worked before the FLSA rate applies to fire protection and law enforcement employees. Both of these types of jobs have different threshold hours defined by FLSA regulations. Both threshold hour schedules are delivered by PeopleSoft and are defined in the FLSA Period Table.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Employee Job Information

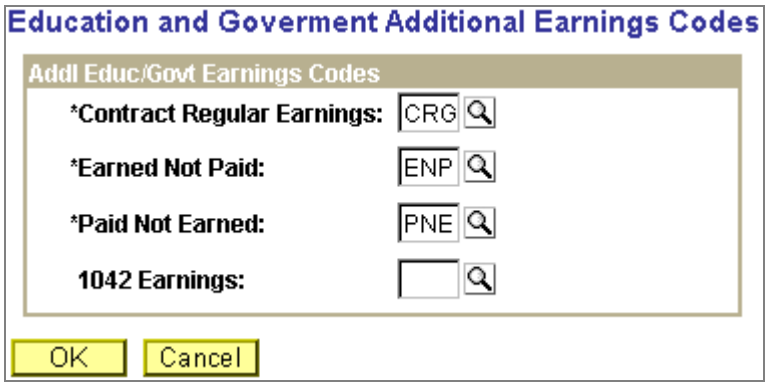
The FLSA Period Subpanel page changes depending on the options you select. The following table shows which fields are visible on the page, depending on the FLSA period definition you select:

FLSA Period Definition	*FLSA Salaried Hours Use: Unspecified or Fixed*	*Use Basic Formula*	*FLSA Calendar ID*	*FLSA Period in Days*	*FLSA Threshold Hours*
Fixed FLSA Period with Fixed Salaried Hours checked and Using Basic Formula unchecked	X	X	X	X	
Fixed FLSA Period with Fixed Salaried Hours checked and Using Basic Formula checked	X	X			
Fixed FLSA Period with Unspecified Salaried Hours checked	X		X	X	
Law Enforcement			X	X	X
Fire Protection			X	X	X

(E&G) Entering Additional E&G Earnings Codes

Access the Education and Government Additional Earnings Codes page.

This page is only available when you access the Pay Group table from the Define Payroll process menu.



Education and Government Additional Earnings Codes page

Select the appropriate earnings code for each field.

CHAPTER 13

(USF) Setting Up Human Resources Management Tables

This section describes the setup of control tables that are specific to federal agencies and tells you how to set up HRMS control tables specific to Federal needs and view PeopleSoft Project Costing and PeopleSoft General Ledger business units.

Setting Up Federal HRMS Control Tables

When creating personnel action requests, you search fields using information from the Legal Authority Table, the Nature of Action Table, the PAR Remarks Table, and the NOA/Legal Authority 1 Table.

When you enter employee-specific information, you use values from the Handicap and the LEO Pay Area Table.

In PeopleSoft HRMS, you use values from the U.S. County Table, the Personnel Office ID Table, and the Sub-Agency Table.

Pages Used to Set Up Federal HRMS Control Tables

Page Name	*Object Name*	*Navigation*	*Usage*
Handicap Table Page	GVT_HANDICAP_TBL	Define Business Rules, Manage Human Resources (USF), Setup, Handicap Table, Handicap Table	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 and add more as needed.
Legal Authority Table Page	GVT_LEGAL_AUTH_TBL	Define Business Rules, Manage Human Resources (USF), Setup, Legal Authority Table, Legal Authority Table	The Legal Authority Table provides the values that are used on the Data Control pages for Personnel Action Request (PAR) processing.

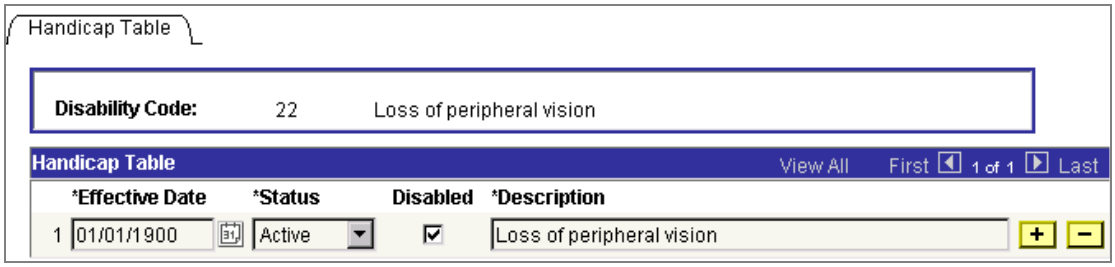
Page Name	*Object Name*	*Navigation*	*Usage*
U.S. Country Table Page	GVT_COUNTY_TABLE	Define Business Rules, Manage Human Resources (USF), Setup, U.S. County Table, U.S. County Table	Contains a complete list of counties in the United States. This table populates the County description on the Location Table. PeopleSoft delivers the list of U.S. counties, but you can add or change an entry if needed.
Nature of Action Table Page	GVT_NOAC_TBL	Define Business Rules, Manage Human Resources (USF), Setup, Nature of Action Table, Nature of Action Table	Review, add, and update codes. This table defines the Nature of Action codes that are used in PeopleSoft Human Resources. Every Personnel Action Request (PAR) requires a Nature of Action (NOA) code, so every personnel action is described in this table and assigned an NOA code. PeopleSoft delivers the NOA codes, but you can add or update entries as needed. When entering NOA codes for your agency's internal use, PeopleSoft suggests that you use codes in the 900 series.

Page Name	*Object Name*	*Navigation*	*Usage*
LEO Pay Area Table Page	GVT_LEOAREA_TABLE	Define Business Rules, Manage Human Resources (USF), Setup, LEO Pay Area Table, LEO Pay Area Table	Set up 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, and you can update them based on Office of Personnel Management updates that you might receive throughout the year.
NOA/Legal Authority 1 Table Page	GVT_AUTH_VAL_1	Define Business Rules, Manage Human Resources (USF), Setup, NOA/Legal Authority 1 Table, NOA/Legal Authority 1 Table	Connect the NOA codes that are defined in the Nature of Action Table with the Legal Authorities that are defined in the Legal Authority Table. You must have set up Nature of Action codes and Legal Authority codes.
Personnel Office ID Table Page	GVT_POI_TABLE1	Define Business Rules, Manage Human Resources (USF), Setup, Personnel Office ID Table, Personnel Office ID Table	Assign an identification number to every personnel office in your agency. Much of the information that you enter is printed on the your personnel action requests.
PAR Approving Officials Table Page	GVT_POI_TABLE2	Define Business Rules, Manage Human Resources (USF), Setup, Personnel Office ID Table, PAR Approving Officials Table	Enter the names that appear in the routing process section of the PAR.

Page Name	Object Name	Navigation	Usage
PAR Remarks Table Page	GVT_SF50_RK_TBL	Define Business Rules, Manage Human Resources (USF), Setup, Pers Action Request Remarks, PAR Remarks Table	Define standardized remarks to attach to PARs. You use some remarks exactly as they are entered here, but you insert employee-specific information into other remarks when you attach the remark at the employee level.
Sub-Agency Table Page	GVT_SUBAGCY_TABLE	Define Business Rules, Manage Human Resources (USF), Setup, Sub-Agency Table, Sub-Agency Table	Set up sub-agencies. If your agency has multiple organizations that might report to the Office of Personnel Management as separate entities, you define them as distinct sub-agencies for online processing purposes.

Setting Up Disability Codes

Access the Handicap Table page.

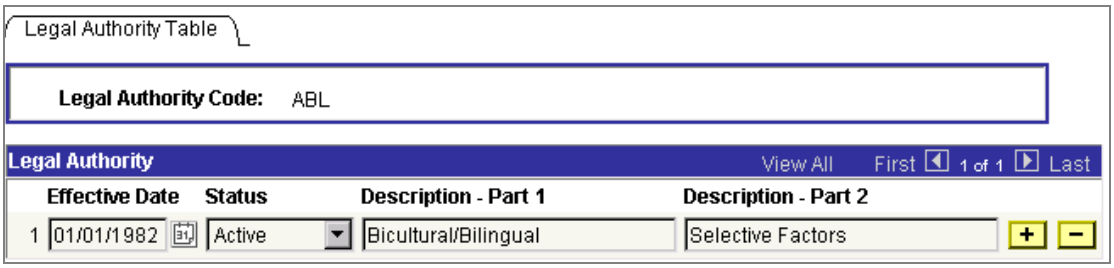


Handicap Table page

Disabled Select if the disability code describes what your agency considers a disability. Usually you select this check box. However, if (for example) you set up a disability code to indicate that an applicant or employee has no disability, leave this check box cleared.

Setting Up Legal Authority Codes

Access the Legal Authority Table page.



Legal Authority Table page

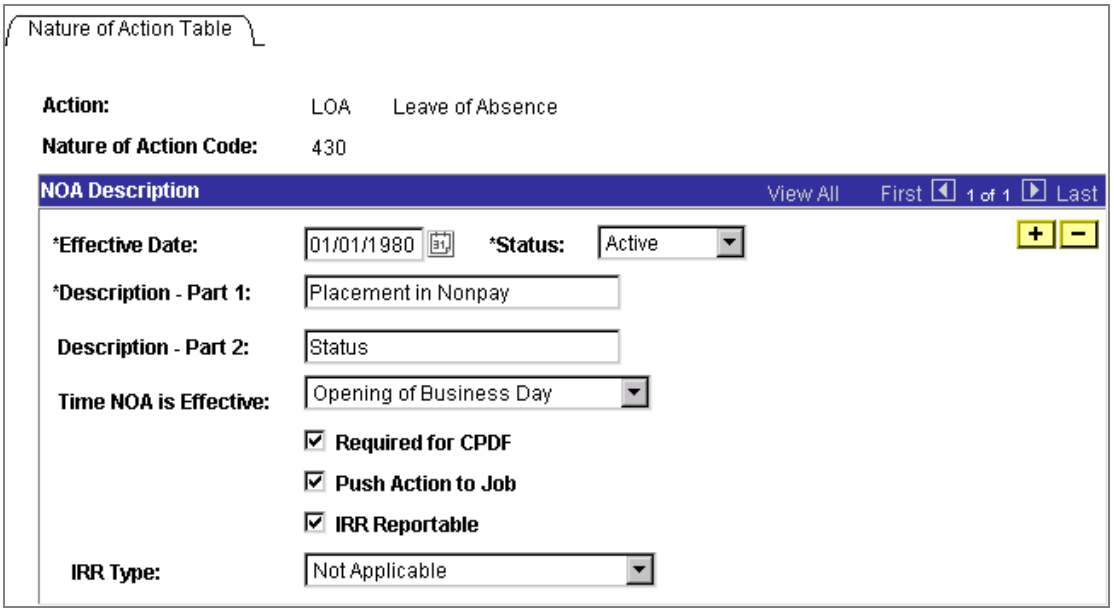
A *legal authority* is the authority that empowers an agency to grant a personnel action request. PeopleSoft delivers your system with a list of legal authorities. If the Office of Personnel Management issues an update of legal authorities, you can keep your system up to date by changing the information in the Legal Authority Table.

When you add a legal authority code to this table, select an effective date early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.

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.

Setting Up Nature of Action Codes

Access the Nature of Action Table page.

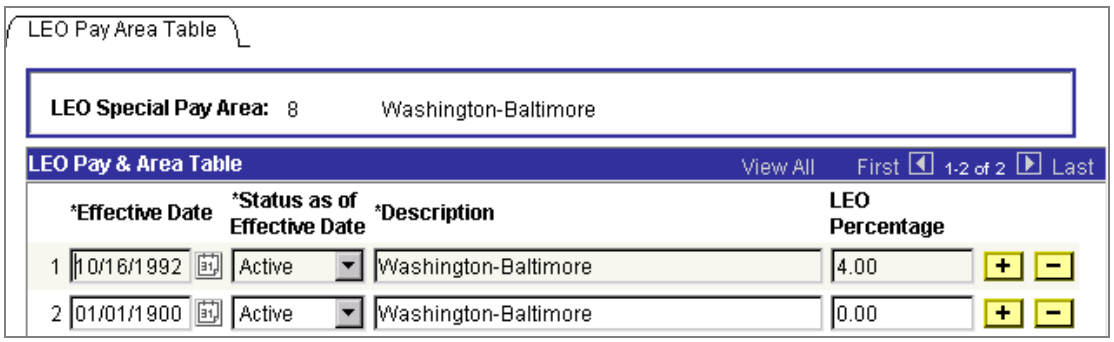


Nature of Action Table page

Nature of Action Code	When you add a Nature of Action code to this table, select an effective date that is early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.
Time NOA is Effective (time nature of action is effective)	This field designates when the personnel action should take effect. Select ***Opening of Business Day*** (the default) or ***Close of Business Day***. If you select ***(none),*** the system uses the default, ***Opening of Business Day.*** In PeopleSoft, all actions are normally assumed to take place at the beginning of business on the effective date. This isn't always the case with the federal government. With ***Termination/Non-Pay*** actions (NOAs that are in the 300 series and 400 series), the action is effective at ***Close Of Business Day*** on the effective date.
Required for CPDF (required for central personnel data file)	Select if the NOA code is reportable to the Office of Personnel Management (OPM) from CPDF reports.
Push Action to Job	Select if the nature of action is to be applied to the core PeopleSoft Job record from the federal government side after saving the personnel action.
IRR Reportable (individual retirement record reportable)	Select if an NOA code is to be reported to OPM on the IRR. This indicates that an IRR-related NOA code is part of an IRR control record when a separation personnel action is saved.
IRR Type	Select the type of IRR to be generated. Values are Retirement***, Transfer/Resignation,*** and ***Supplemental.***

Setting Up LEO Pay Areas

Access the LEO Pay Area Table

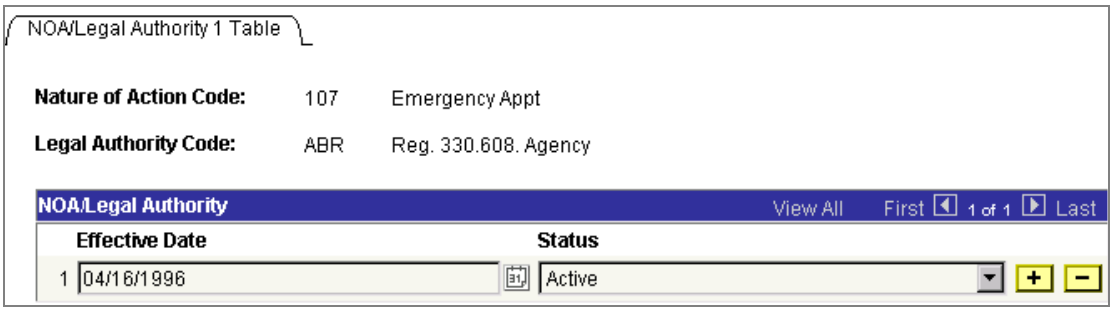


LEO Pay Area Table page

LEO Percentage (law enforcement officer percentage) — Enter the percentage of base pay that LEOs in this region receive in addition to the base pay set by their pay plan, grade, and step. The amount is reflected on the Compensation Data page in Administer Workforce.

Associating Nature of Action Codes with Legal Authority Codes

Access the NOA/Legal Authority 1 Table page.

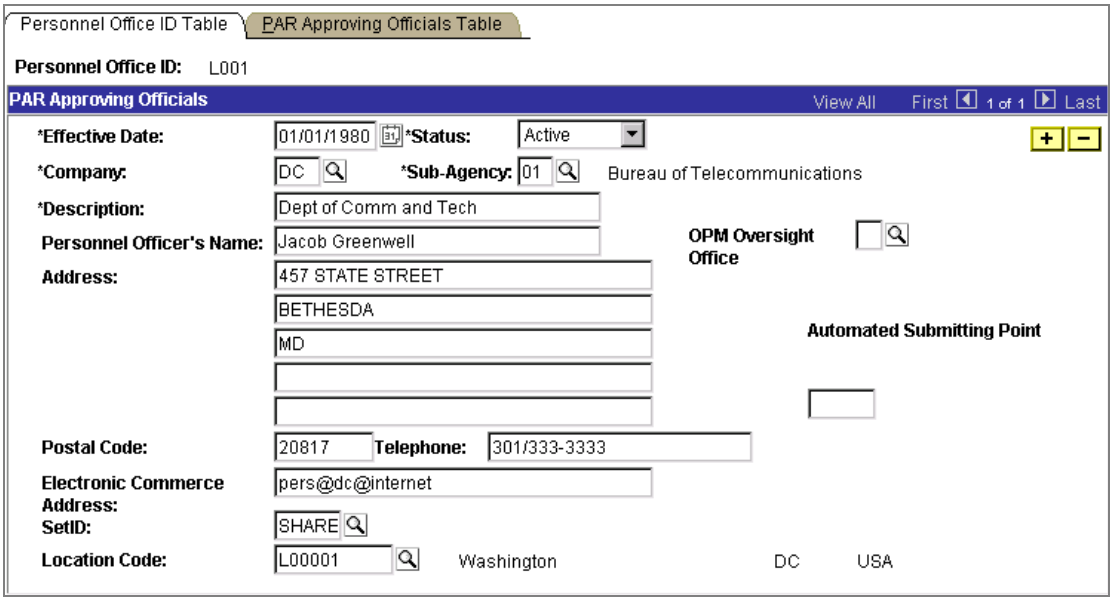


NOA/Legal Authority 1 Table page

When you enter an NOA (nature of action) code on the PAR Data Control (personnel action request data control) page in Administer Workforce and prompt on the Authority (1) field, you see only the valid values from this table. However, for Authority (2), you can select any of the legal authorities that are defined in the Legal Authority Table.

Setting Up Personnel Office IDs

Access the Personnel Office ID Table page.

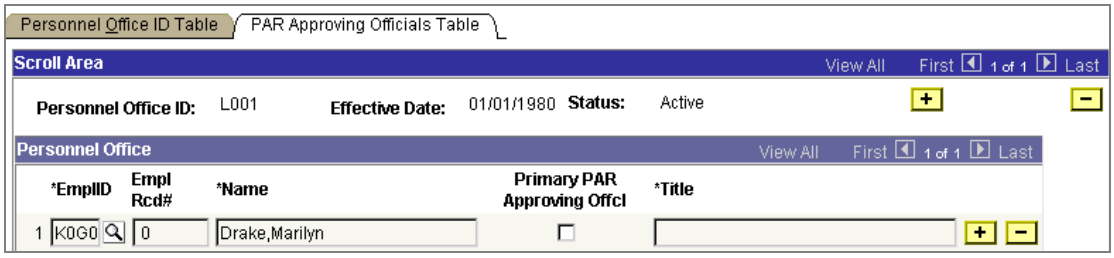


Personnel Office ID Table - Personnel Office ID Table page

Sub-Agency	Select the sub-agency code.
Personnel Officer's Name	Enter the name of the person who is responsible for personnel actions for this office.
OPM Oversight Office (Office of Personnel Management Oversight Office)	Select the OPM Oversight Office to which you report personnel actions from the available values. The values are stored on the Translate table. To change or add values, inform your project management office of the updates you require.
Electronic Commerce Address	This address is for your agency's information only. For example, this might be an email address or a government network ID.
Automated Submitting Point	The automated submitting point is an informational field and isn't used during PeopleSoft HRMS processing. However, it is required on the OPM form that is used to communicate the establishment of or changes to a Personnel Office Identifier for currently operating personnel offices.

Specifying PAR Approving Officials

Access the PAR Approving Officials Table page.

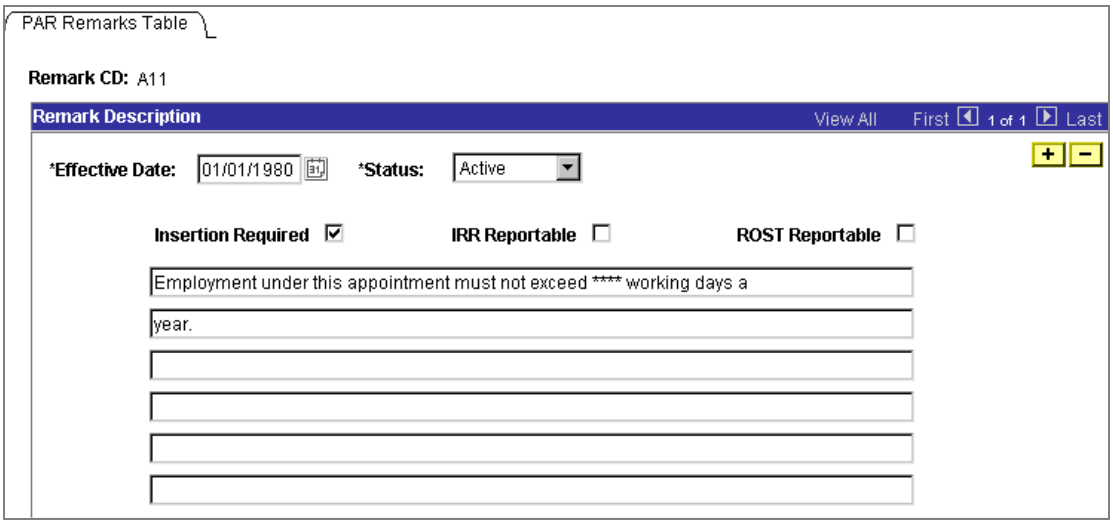


Personnel Office ID Table - PAR Approving Officials Table page

EmplID (employee ID)	Enter an employee ID for each official who approves personnel actions. When you move out of the field, the system populates the **Empl Rcd#, Name,** and **Title** fields. You can edit these fields.
Primary PAR Approving Offcl (primary personnel action request approving official)	Select if applicable. This check box is for your information only.

Setting Up PAR Remarks

Access the PAR Remarks Table page.



PAR Remarks Table page

The Office of Personnel Management (OPM) designates remark codes that begin with *A* through *X*. PeopleSoft delivers the current standard OPM PAR remarks, but you need to maintain them, based on OPM updates that you might receive throughout the year. To enter additional remarks for your agency's internal use, use codes that begin with *Y* or *Z*. When you upgrade PeopleSoft HRMS, retain your agency-specific remarks.

Insertion Required
Select if this remark needs employee-specific information. When you select this remark at the employee level, this check box is unavailable for entry.

PeopleSoft uses an asterisk (*) to denote employee-specific information that is changed by your human resources personnel clerk when the remark is attached to a PAR at the employee level.

IRR Reportable (individual retirement record reportable)
Select if this remark is attached to a PAR that is to be printed on an IRR and you want to print the remark on the IRR.

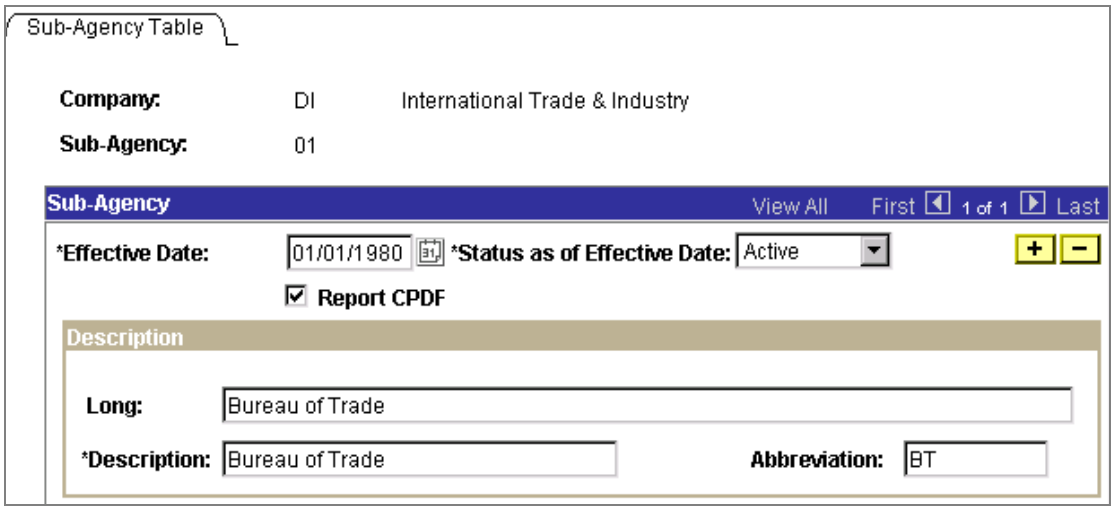
ROST Reportable (Register of Separations and Transfers reportable)
Select to have this remark printed on the ROST.

See Also

PeopleSoft Payroll for North America PeopleBook, "USF Processing Individual Retirement Records (IRRs)" and "USF Processing the Register of Separations and Transfers (ROST)"

Setting Up Sub-Agencies

Access the Sub-Agency Table page.



Sub-Agency Table page

Report CPDF (report central personnel data files)	Select if this sub-agency reports CPDF on a regular basis. This check box is informational only.
Long	Enter a long description of the sub-agency.
Abbreviation	Enter an abbreviated description of the sub-agency.

Viewing the Project Costing and General Ledger Business Unit Tables

The PC (project costing) Business Unit Table and GL (General Ledger) Business Unit Table are view-only pages. The PC Business Unit Table is part of the Project Costing process in PeopleSoft Financials, which interacts with the Time and Labor process. If you don't use project costing, you don’t need to import the values for this table. The GL Business Unit Table is part of the General Ledger process in PeopleSoft Financials that interacts with the Payroll process. If you don't use General Ledger, you don’t need to import the values for this table.

Note. For more information about the PC Business Unit Table, see your PeopleSoft Time and Labor documentation.

Note. For more information about the GL Business Unit Table, see your PeopleSoft General Ledger documentation.

CHAPTER 14

Administering PeopleSoft Security

This chapter provides an overview of security in PeopleSoft HRMS and tells you how to:

- Choose a security type.
- Create and modify security trees.
- Link a tree with row-level security and grant department access.
- Create security fast views.
- Update data access profiles and security fast views.
- Set up security for applicant data.
- Set up security for global functionality.
- Configure data permission security.
- Set up security for self-service transactions.

Understanding PeopleSoft Security

Online security is a critical issue in any organization. Because most employee data in PeopleSoft Human Resources is confidential, you need to be able to designate the data that your users are allowed to see. For example, you might want managers to see only data that applies to the employees in their own departments.

PeopleSoft Security is based on permission lists and roles, as follows:

- Access to menus, components, pages, and global functionality, along with other information, is assigned to permission lists.
- Permission lists are assigned to roles; however, some permission lists are assigned directly to the user.
- Roles are assigned to the user.

Security for PeopleSoft Human Resources is concerned with employee data access, or *data permission*, and access to local country functionality in PeopleSoft HRMS global components.

- As delivered, PeopleSoft Human Resources is ready for setting 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 or deny access that data permission lists have to organizational entities.

You can improve the performance of data retrieval by using the Security Fast Views feature. This feature loads the information that you have set up in the security tree, along with employee job data, into a pre-indexed table. This reduces the amount of time that the system takes to retrieve data.

See Also

PeopleTools PeopleBook: Security

Understanding Data Permission Security

Data permission security (also called *row-level security*) is part of the overall PeopleSoft security setup and refers to controlling access to employee data on an individual basis. Employee data is the area of security that most concerns PeopleSoft HRMS because it involves maintaining the confidentiality of your employees' data.

Important! In this section, we describe 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, except for pension payee non-employees. Pension Administration non-employees (beneficiaries and QDRO [qualified domestic relations order] alternate payees) are established in the system as if they were employees, complete with employee IDs and job data, in a department.

Data permission security works by associating an employee's data with a department ID. Using security trees, you grant data permission lists access to certain department IDs, which in turn give access to the data of the employees in that department. Users are then assigned a data permission list. When users logs in to the system, their data permission lists identify which department's employee data they can access.

Security Trees

Using PeopleSoft Tree Manager, you create a security tree that represents 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 grant access to the entity to which all of those entities report. You can restrict access to individual entities or to a group of entities.

For example, the Los Angeles, San Francisco, Seattle, and Portland offices report to the western region of the United States, which reports to the American Corporate Office. Most people who require access to employee data from one office in the western region usually require access to employee data from all four offices. Rather than granting a data permission list access to each office separately, you grant access to the entire region.

You can also restrict access to one of the branch entities. If one permission list requires access only to the San Francisco, Los Angeles, and Portland offices, you grant access to the western region but deny access to the Seattle office.

Data Permission Lists

Entity access is granted to data permission lists rather than individual users because groups of employees often require access to the same employee data. Using the above example, if you grant access to the western region to the WEST data permission list, then you can assign that list to the three human resources clerks, two payroll clerks, and one training administrator who cover the western region. If you adjust the data permission list, the employee data access for the six employees also changes, reducing your user access maintenance.

See Also

PeopleTools PeopleBook: Security

How Does Data Permission Security Work?

To understand how PeopleTools enables employee data security, it helps to understand how the system retrieves data when you access a page or component.

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

The system also uses search records to enforce data permission security. In addition to the key and alternate key fields that you see on the search page, search views for components that contain 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 (Structured Query Language) selec*t* statement along with the values that the user entered on the search page. The system retrieves the employee data that matches the criteria from the search page and the user's data permission list. The system doesn't retrieve data for 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 retrieves employee data only for the employees with the name Smith to whom you have access.

Not all PeopleSoft 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 have only one search record. To associate more than one search record with a component (for example, data level security for some users and no data for others), you reinstall the component on different menus, one for each search record and grant access to the appropriate component.

See Also

PeopleTools PeopleBook: Application Designer

Creating Security Fast Views

Choosing a Security Type

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 the following ways to implement data permission security:

- Departmental security.
- No security.
- International security (a configuration option).

PeopleSoft HRMS applications are delivered with departmental security implemented for all of its security views, you can change from Department Security to No Security. In this section, we describe the three basic types of security and how to implement them.

The security type that you choose depends on how you define employee assignments, how you organize employee records, and the level of confidentiality that you need to maintain.

Security Type	*Description*
Departmental Security	Departmental Security is the default security that is delivered with PeopleSoft HRMS. Users are granted or denied access to employee data based on the organizational hierarchy that you define in the security tree. When you grant users access to a department ID on the security tree, you automatically grant them access to employee data in any department that reports (directly or indirectly) to that department ID, unless you restrict access to a specific department. Using 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.

Security Type	*Description*
International Security	This is a configuration option. Human resources (HR) administrators in one country might not have access to the records of employees in another country. Usually this is not a problem, but if (for example) a U.S. employee is on assignment in France, the U.S. administrator might require access to that employee's French job data in addition to the American job data. To implement this configuration, use PeopleSoft Application Designer to replace the SQL objects in the SQL viewtext for the search views that use international security. Then re-create the view with the new SQL objects. Following is a list of the 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

See Also

Creating and Modifying Security Trees

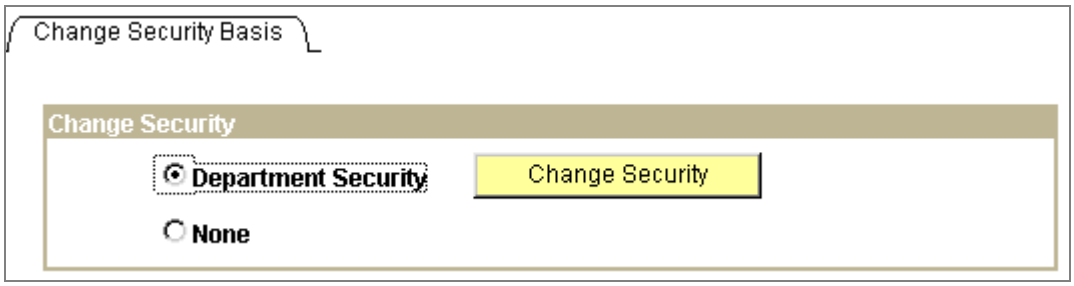
PeopleTools PeopleBook: Application Designer

Page Used to Switch Between Departmental Security and No Security

Page Name	*Object Name*	*Navigation*	*Usage*
Change Security Basis	CHG_SECURITY	Define Business Rules, Define General Options, Process, Change Row Security Basis, Change Security Basis	Switch between Departmental Security and No Security for your data permission security type.

Switching Between Departmental Security and No Security Options

Access the Change Security Basis page.



Change Security Basis page

Important! Changing security has broad implications throughout the system. Run this process only when you first implement security or when you restructure your system in a major way.

Department Security	Select to control user access to employee data, based on the departmental hierarchy in the security tree. Department Security is the default.
None	Select to *not* restrict user access to employee data. If you select **None,** users can view the data for each employee. You can still restrict user access to menus, components, and pages. If you select this option, the ROWSECCLASS field cannot be used as a key field or list box item for security tree. When you select this option, the FAST_SQR_SEC_VW will be modified so that all employees are returned in SQRs.
Change Security	Click this button to change the security type from the existing security type to the one that you selected.

Creating and Modifying Security Trees

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

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

This section describes how to:

- Create a security tree manually.
- Create a security tree automatically.

- Audit a security tree.
- Modify a security tree.
- Link a security tree with row-level security and grant department access.

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

Creating Security Trees

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 PeopleSoft Tree Manager or the Managing Human Resources menu. You assign security access based on these departments, so define each entity in your organization in the Department Table so that its department ID code can be added to the security tree.

Trees are built with levels and nodes:

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

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

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

Security and Your Organizational Structure

Although you use your organizational structure as the foundation for your employee data security structure, the two structures are not the same. The primary difference between them is that in your security structure, you continue to maintain inactive departments. You do this so that users can retrieve data for the employees who are associated with the inactive departments. While the inactive departments don't appear in your organizational structure (that is, in your organization chart), they need to appear on your security tree; otherwise, you would have employee data that no one could access.

Unlike an organization chart, a security tree has the following characteristics:

- Only one security tree at a time can be in effect for each set ID; 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 inactive departments will disappear.

To use trees (for reporting purposes) that accurately reflect your organization chart at a particular time, create a separate organizational tree, rather than using your security tree.

Creating a Security Tree Manually

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

Field	***Description***
Tree Name	Enter *DEPT_SECURITY.*
Structure ID	Select *DEPARTMENT.* PeopleSoft delivers the system with this structure ID set up.
Description	Enter a description of the tree.
SetID	Select the setID of the departments that you will add to the tree.
Effective Date	Enter the date that the tree becomes effective. Add only the departments that are effective on or before this date.
Status	Select the status of the tree.
Category	Select the category of the tree.
Use of Levels	Select one of the following options: *Strictly Enforced:* Your levels consist of only one type of entity. For example, only regions report to the company level and only divisions report to the regional level. *Loosely Enforced:* The entities combine different types of entities. For example, both regions and divisions report to the company level. *Not Used:* Your security structure is flat, and you don't need to set up groups of units in levels.
All Detail Values in this Tree	Leave blank.
Allow Duplicate Detail Values	Leave blank.

Inserting Nodes

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

You must have a node for every department in your organization on an active security tree; otherwise, you cannot implement security for them. You can add nodes to your trees as you add departments to your organization.

See Also

PeopleTools PeopleBook: Tree Manager, "Creating Trees"

Creating a Security Tree Automatically

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

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

1. Import the entity data.

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

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

New Column	*Description*
TREE_NODE_NUM	Temporary work column.
TREE_NODE_NUM_END	Temporary work column.

2. Set up the reporting hierarchy.

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

3. Build the department security tree.

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

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

   c. Perform step 3 again.

4. Transfer department data into the department table.

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

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

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

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

PeopleTools PeopleBook: Mass Change, "Import Manager"

Auditing a Security Tree

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 in the Department Table. You cannot implement departmental security for new departments until you add them to your security tree. This audit ensures that you add each department in your system to the security tree.

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

Modifying a Security Tree

You can modify an existing tree by changing either the nodes or the levels. When you modify a security tree, the tree node numbers usually change, so you need to refresh the numbers. You also need to run the Security Administration process to update the data access profiles and Security Fast Views, if you are using them.

Renumbering Gaps in a 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 a security tree. When you move a node, the system renumbers the nodes that appear to the right of the node that you moved (the children of the node that you moved). When you save changes to a tree, the system saves only the parts of the tree that have changed.

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

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

See Also

PeopleTools PeopleBook: Tree Manager

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

Linking a Tree with Row-Level Security and Granting Department Access

Once you set up your security tree, you must run a process from the Security Administration page to update row-level security so that the system recognizes the current effective date of your security tree. When your security rules correspond with that date, you or your system administrator can use grant or deny access to departments.

Update row-level security when you:

- Create a security tree.
- Reorganize a security tree.
- Plan to use a tree with a different effective date.

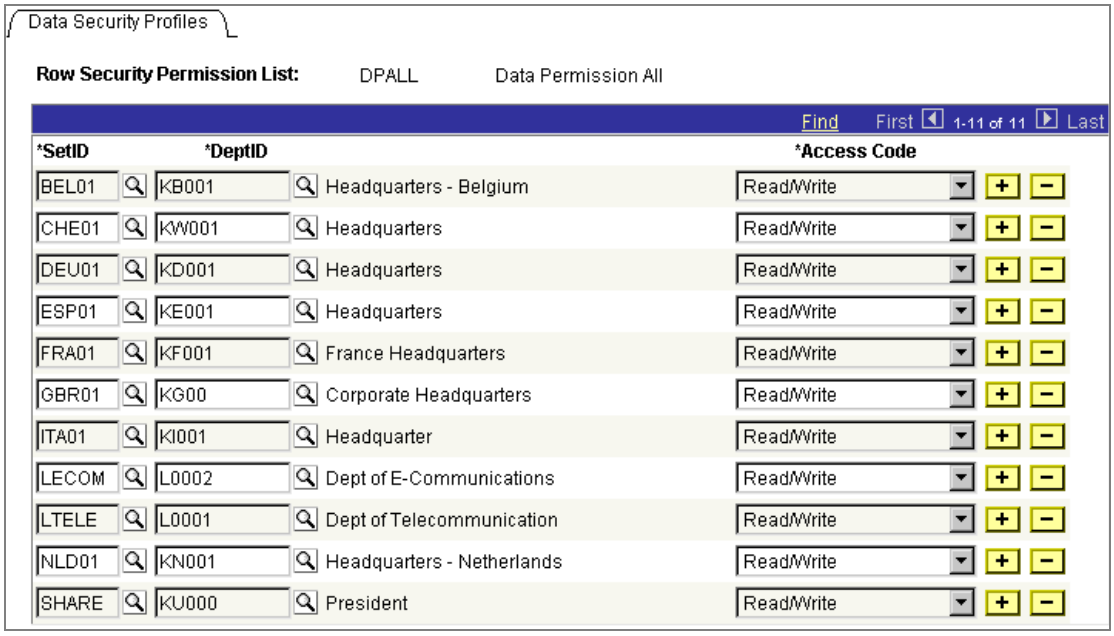
Update data security only on the date that the new tree takes effect. The system uses the trees with the date that is closest to (but not greater than) the date that you enter when you run the security administration utility. Always perform this step when you're ready to use the new trees.

Page Used to Grant Department Access

Page Name	*Object Name*	*Navigation*	*Usage*
Data Security Profiles	SCRTY_TABL_DEPT	Define Business Rules, Administer HR System, Use, Maintain Row Level Security, Data Security Profiles	Grant department data access to data permission lists.

Assigning Department Access

Access the Data Security Profiles page.



Data Security Profiles page

Each Department ID to which you are granting access on this page must have a node on an active security tree. Also, you must have run the Security Administration process, with the Update Security check box selected, at least once.

The PeopleSoft HRMS naming convention for data permission lists is DPXXXXX. This component can be accessed only for row security permission lists that begin with *DP*.

SetID and **DeptID** (department ID)

Enter the SetID and the ID of the department that you are granting access to. On the security tree, the row security permission list has access to each department ID that reports up to this one (unless you specify otherwise), so you don't have to select each department ID individually. For example, if department IDs 510, 540, and 570 report to department ID 500, select only department ID 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 department ID that you've granted access to, insert a row and select the restricted department's ID. Using the example in the preceding paragraph, if you want the permission list to have access only to department IDs 500, 510, and 570, you first grant access to department ID 500. Then you insert a second row and restrict access to department ID 540.

In a third scenario, you grant access to a level 3 entity, not to a level 4 entity, but to a level 5 entity that reports to the level 4 entity. To do that, you grant access to the level 3 entity, deny access to the level 4 entity, and grant access to the level 5 entity.

You need to restrict access explicitly only for department IDs that report up to the department ID to which you want to grant access. Otherwise, the row security permission list doesn't have access to a department ID unless the list or the department ID 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 for this department ID.

Creating Security Fast Views

As explained in Understanding Data Permission Security, the system uses search views to enforce security. The system retrieves only the employee data rows to which the user's data permission list grants them access. The system searches through several tables to find the security tree and job data information that 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 on the search page, the system uses Security Fast Views to retrieve the data from that table. The index makes the search more efficient, so the data is retrieved more quickly.

The drawback is that the data in the tables is static, and changes that are made to records throughout the day aren't reflected in the records in the tables. Therefore, when you retrieve a

record with Security Fast Views, you aren't necessarily looking at the most recent data. To keep the data current, you must refresh the tables periodically.

In this section, we describe the Security Fast Views options and how to implement them. As delivered, only the components that have PERS_SRCH_GBL or EMPLMT_SRCH_GBL as search records can be assigned a Security Fast View.

Types of Fast Views

PeopleSoft HRMS delivers three Fast View tables, which are based on different views. The 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 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 View*	*Based on This 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) containing 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 data 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 View	Based on This Table
PERS_SRCH_GBL	FAST_PERSGL_VW2 (for online access) FAST_SQR_SEC_VW (for security enabled SQRs)	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 selected. If you are using PeopleSoft Benefits Administration but *not* Multiple Jobs, use Fast View Table 1 or 2.

Note. Always use Fast View Table 3 in conjunction with Fast View Table 2.

Default Search View	Fast View	Based on This Table
EMP_BEN_SRCH_MJ	FAST_EMP_BEN_2	FAST_EMP_BEN_1

Choosing Fast View Table 1 or 2

Implementing Fast View Table1 provides the greatest system response time gains, but before you decide which security search view option works best for your implementation of PeopleSoft HRMS, consider your special needs and weigh the performance and accuracy issues carefully.

Implementing Fast Views

Switching to Security Fast Views requires the use of PeopleSoft Application Engine, Application Designer, and Process Scheduler. We recommend that the database administrator, or someone who is familiar with those tools, perform this implementation.

Also consider your available disk space and processing time. The flat tables that are generated by PeopleSoft Application Engine HR_FASTVIEW might be large, depending on your system. They can take up a lot of disk space and 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 to generate the table, and so forth. Remember that you can use PeopleSoft Process Scheduler from PeopleSoft Application Engine to schedule the application to run during off-peak hours.

To implement new fast security search views on your human resources system:

Perform steps 1 through 5 only once to set up Security Fast Views. Perform step 6 for ongoing maintenance.

1. In PeopleSoft Application Designer, verify that your tables are created properly.

   Verify that the Fast View table you are using (FAST_SCRTY_1, FAST_SCRTY_2, or FAST_EMP_BEN_2) is in place and ready to receive data.

2. In PeopleSoft Application Designer, create the view.

   a. Use the SQL create command to create the views that run off the Fast View table that you are using.

   b. Exit PeopleSoft Application Designer.

3. In PeopleSoft Application Engine, run HR_FASTVIEW to insert data into the indexed tables.

   a. From the Security Administration page, run Security Fast Views.

   b. Select the refresh type that 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 Security Fast Views references when you access your human resources database.

4. Check the PeopleSoft Application Engine results.

   Before you assign the Security Fast View to your system and before you switch the search records using PeopleSoft Application Designer, make sure that PeopleSoft Application Engine has populated the Fast View tables as you expected. Query the Fast View tables to confirm that the data is there.

5. Assign the new security fast view to PeopleSoft HRMS components using PeopleSoft Application Designer.

   a. Open PeopleSoft Application Designer.

      As delivered, only components that have PERS_SRCH_GBL or EMPLMT_SRCH_GBL as search records can be assigned a security fast view.

   b. Select **File, Open, Object Type,** and **Menu.**

      The system displays the Open Object page.

   c. Select a menu item from the list under Objects Matching Selection Criteria.

      For example, select ADMINISTER_WORKFORCE_(GBL) to display the ADMINISTER_WORKFORCE_(GBL) menu.

d. From the menu, select the component that you want switched to Security Fast Views.

Continuing with the example, to apply Security Fast Views to the Personal Data component, select **Use, Personal Data,** and double-click **Personal Data.** The system displays 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.

e. On the Menu Item Properties page, select the **Override** check box and select a fast view to replace the default **Search Rec** (search record) value.

In this example, the fast view FAST_PERSGL_VW1 replaces the default view PERS_SRCH_GBL.

f. Save your changes and close PeopleSoft Application Designer.

6. 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, refresh the data regularly using the Security Administration page. You may want to use PeopleSoft Process Scheduler to specify refreshing the tables once a day, once every few days, once a week, and so forth, depending on the Fast Security View option that you've implemented, and your own data requirements.

See Also

PeopleTools PeopleBook: Process Scheduler

Updating Data Access Profiles and Security Fast Views

Update your data access profiles and security fast views periodically so that they are based on the most current information.

Data Access Profile

Update your data access profile when:

- You create or modify your security tree.
- You use a tree with a different effective date.

Update row-level security on the date (not before the date) that the new tree takes effect. The system uses the trees with the date that is closest to (but not greater than) the date that you enter when you run the utility.

Security Fast Views

Refresh Fast View Table 1 when:

- You reorganize your security tree.

- You use a different security tree.
- Your job data that affects access rights (such as a department change or promotion) changes.

Note. Because changes to job data happen daily, we recommend running this process nightly so that the system retrieves the most recent data.

Refresh Fast View Table 2 (and Fast View Table 3, if you are using it) when:

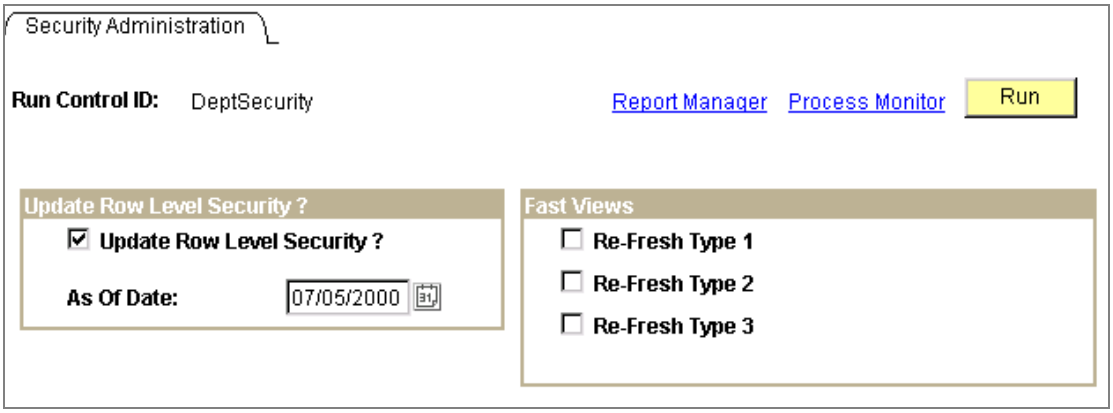
- You reorganize your security tree.
- You use a different security tree.

Page Used to Update Row-Level Security and Security Fast Views

Page Name	*Object Name*	*Navigation*	*Usage*
Security Administration	RUNCTL_FASTVW	Define Business Rules, Administer HR System, Process, Security Administration, Security Administration Administer Workforce, Mass Organization Changes USF, Process, Security Administration, Security Administration	Update your security tree row-level security and Security Fast Views, if you are using them.

Updating Row-Level Security and Security Fast Views

Access the Security Administration page.



Security Administration page

Update Row Level Security?

Update Row Level Security Select to update the data access profile to correspond to your security tree information.

As Of Date Select the date that you update your security tree. Update row-level security only on the date that the new tree takes effect. For each setID, the system uses the tree with the date that is closest to (but not greater than) the date that you enter when you run the Security Administration process.

Fast Views

Re-Fresh Type 1 Select to refresh Fast View Table 1.

Re-Fresh Type 2 Select to refresh Fast View Table 2.

Re-Fresh Type 3 Select to refresh Fast View Table 3.

Click **Run** to run this request. PeopleSoft Process Scheduler runs the update row-level security process at user-defined intervals.

See Also

PeopleTools PeopleBook: Process Scheduler

Setting Up Security for Applicant Data

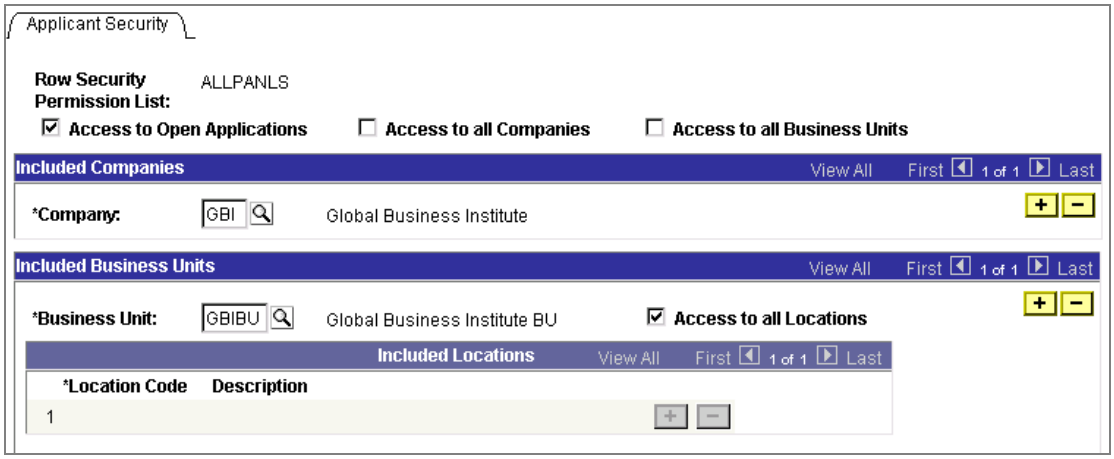
Before you set up applicant security, you must create security classes for your organization and define your department security tree.

Page Used to Set Up Security for Applicant Data

Page Name	Object Name	Navigation	Usage
Applicant Security	SCRTY_TBL_APP	Define Business Rules, Administer HR System, Use, Maintain Applicant Security, Applicant Security	Set up access to applicant data. You can assign access from this page to applicant data for all or selected companies, business units, and locations.

Setting Up Security for Applicant Data

Access the Applicant Security page.



Applicant Security page

On this page, you define applicant security for data permission lists, which are assigned to users in the User Profile component.

Access to Open Applications Select to give the selected security class access to all applicants who aren't linked to a requisition.

Access to all Companies Select to give the selected security class access to applicant data in all companies.

When you select this check box, the **Company** field is unavailable for entry.

Access to all Business Units Select to give the security class access to applications for all business units.

When you select this check box, the fields in the **Included Business Units** group box and **Included Locations** grid are unavailable for entry.

Included Companies

Company	Select from the list of values. Add companies as needed.

Included Business Units

Business Unit	Select from the list of values. Add business units as needed. If you select the **Access to all Business Units** check box, the **Business Unit** field is unavailable for entry.
Access to all Locations	Select to give the security class access to all locations within the selected business unit. If you select this check box, the **Included Locations** grid is unavailable for entry.

Included Locations

Location Code	Select from the list of values.
Description	When you move out of the **Location Code** field, the system completes the description.

See Also

PeopleSoft Human Resources: Recruit Workforce, "Administering Job Requisitions"

Setting Up Security for Local Functionality

Local functionality refers to local functionality that is specific to a country. Country-specific functionality is in collapsible sections, marked by the country's flag, in the global components. To grant user access to local components, you use component permission. To grant user access to the local functionality on those components, you use the Maintain Global Security page.

To set up security and grant users access to local country functionality on the global menus:

1. Use the Installation Table 3 page to indicate the local country functionality that is installed as part of your PeopleSoft HRMS system.

   If a country is not specified, its local functionality can't be accessed.

2. Grant the primary permission lists access to country-specific functionality using the Maintain Global Security page.

3. Assign a user access to a primary permission list containing access to the countries that are required by the user on the User Profile - General page.

See Also

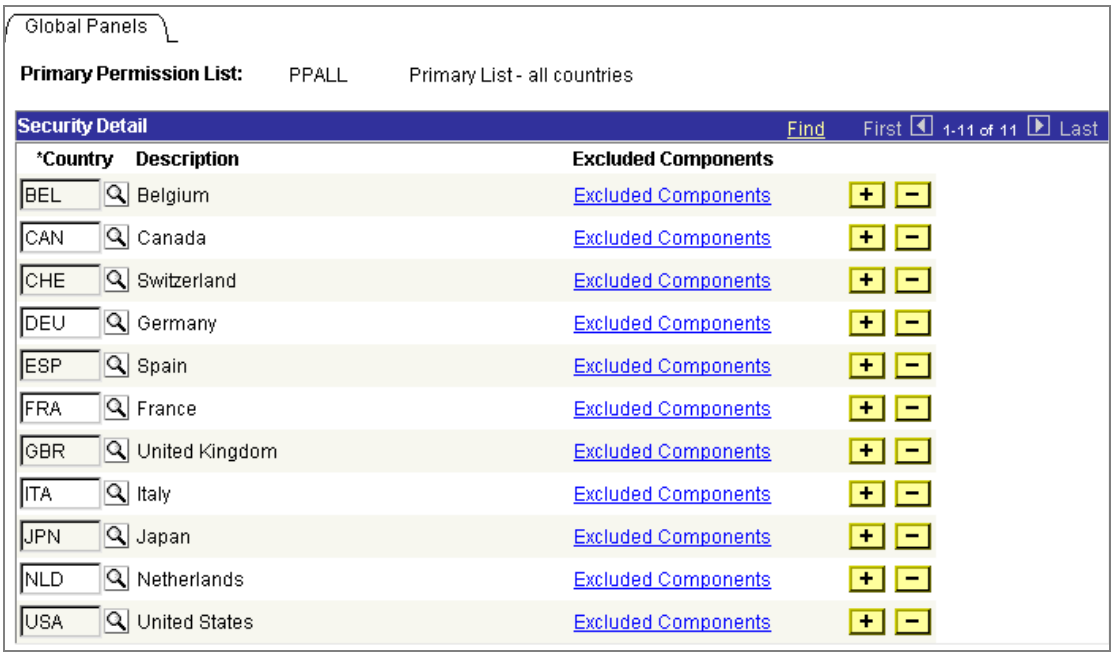
PeopleTools PeopleBook: Security, "Working With Permission Lists"

Pages Used to Grant Access to Local Country Functionality

Page Name	*Object Name*	*Navigation*	*Usage*
Maintain Global Security - Global Panels	SCRTY_TBL_GBL	Define Business Rules, Administer HR System, Use, Maintain Global Security, Global Panels	Select which local country functionality a primary permission list can access. You can also establish component-level security for local functionality. You can hide the local functionality in a component to which a permission list has access, even when the permission list can access that country's functionality in other components.
Maintain Global Security - Excluded Components	SCRTY_GBL_SEC	Click the Excluded Components link on the Maintain Global Security page.	Select the components for which the local functionality for this country row should be hidden.

Granting Access to Local Country Functionality

Access the Maintain Global Security - Global Panels page.



Maintain Global Security - Global Panels page

Global security is driven by the primary permission list that is linked to the user, so only permission lists that follow the PeopleSoft HRMS naming convention PPXXXX can be accessed here.

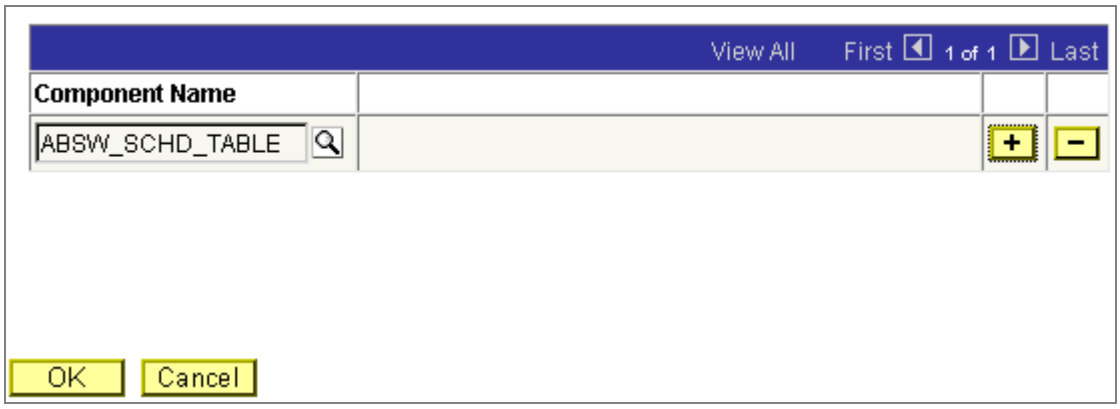
Primary Permission List Users assigned to this permission list can access the local functionality of the countries that you indicate on this page. Primary permission lists are defined in the Permission List component. Users are assigned a primary permission list on the User Profile - General page.

Country Select the country or countries whose local functionality users assigned to the primary permission list can access in global components.

Excluded Components When you click **Excluded Components,** the system displays the Restricting Access to Local Country Functionality. Using this page, you can restrict access to country-specific functionality in components. For example, you can restrict a group of users' access to Italian-specific functionality on the Personal Data component, while not restricting their access to the Personal Data component or to Italian functionality in other components.

Restricting Access to Local Country Functionality

Access the Maintain Global Security - Excluded Components page.



Excluded Components page

Component Name Select the name of the component for which global functionality for this country is being restricted. For example, to restrict access to Italian-specific functionality in the Personal Data component, select the Personal Data component.

Modifying Data Permission Security

PeopleSoft HRMS provides a security structure that uses 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 the following circumstances:

- Users have access to data for employees in specific parts of your organization.
- Your security structure is largely based on your organizational structure.
- The structure is hierarchical.

You don't have to grant and deny access to each organizational entity every time you make changes. Effective dates and the hierarchical format of the trees simplify maintenance.

You might want to modify your security, 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 that 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 the department IDs that the user is authorized to access.

If you use this view, you need to create a class of users who can access all departments so that they can perform transfers. Also, update the Job record definition in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_TBL_ACCESS.

See Also

PeopleTools PeopleBook: Application Designer

Allowing Employees to Update Their Own Data

PeopleSoft HRMS doesn't allow users to update their own data except in the self-service internet applications. However, sometimes you might want them to update some of their own data in other components. To allow users to update their own data, you implement the PeopleCode function Allow EmplIDChg (allow employee ID change). The function looks for a single Boolean parameter. When the parameter is set to true, employees can update their own data; when it is set to false, they cannot.

For example, to allow employees to change their own personal data, you enable the PeopleCode function for PERSONAL_DATA, the underlying record definition for the Personal Data component. Then employees can change their personal data, but not their job information.

To enable the Allow EmplIDChg function:

1. Open the record PERSON in PeopleSoft Application Designer.
2. Open the RowInit PeopleCode on the **EMPLID** field.
3. Insert new code after this line:

```
/************ START OF ROW INIT PEOPLECODE *************/
```

4. Insert a row and enter the following code after the first line (a comment) of existing code:

```
if %Page = PAGE.PERSONAL_DATA1B then
    AllowEmplidChg(true);
end-if;
```

5. 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, enter this PeopleCode function in the underlying record definition for each page where you want to allow updates.

Security Search Views

Use the project HRSECVIEWS to view a list of all the security views.

Warning! When you modify security search views, each view must be altered appropriately; otherwise your security is compromised.

Setting Up Security for Self-Service Transactions

Self-service transactions are listed on the following menus:

- Applicant
- Employee
- Faculty
- Manager
- Optionee
- eBenefits

Each menu represents the role of the user who accesses the transactions listed under that menu. For example, a user who changes his or her own emergency contact information is acting as an employee, so the Emergency Contact component is an Employee self-service transaction. A user who grants an employee a promotion is acting as a manager, so the Promote Employee component is a Manager self-service transaction.

Much self-service security is based on information, such as employee ID or manager ID, that you have set up elsewhere in the system. However, some setup is 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 assigns them user IDs. Internal applicants already have user IDs.

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 retrieve only the data row that matches the user ID. Therefore, an employee who uses an Employee, Faculty, Optionee, or eBenefits self-service transaction can retrieve his or her own data.

Note. For this to work, your user profiles must be attached to employee IDs.

See Also

PeopleTools PeopleBook: Security

How Does Data Permission Security Work?

Setting Up Security for PeopleSoft eRecruit Manager Desktop

PeopleSoft eRecruit Manager Desktop has two roles, hiring manager and recruiter. Apart from giving users access to the components using Maintain Security, there is no special security setup required.

PeopleSoft eRecruit Manager Desktop automatically restricts access to job requisition and applicant data using the authorization fields in the job requisition. Managers and recruiters have access to job requisitions and associated applicants if they are named as the originator, authorizer, or recruiter of a job requisition.

Setting Up Security for Manager Self-Service Transactions

The system determines who can access to manager self-service components and data by determining the answers to these questions:

- Is this user a manager?
- Who reports to this manager?

You determine a user's access to some or all of the Manager self-service components when you define their component access on the Permission List component. In the Manager Self Service Options component, you specify whose data a user can see for a particular manager's self-service transaction.

The system determines what kind of reporting relationship exists between users and their employees. Reporting relationships are determined on two pages: the Work Location page and the Department Profile page. On the Work Location page, you indicate who an employee's manager is. On the Department Profile page, you indicate who manages a department and the employees that report to that department.

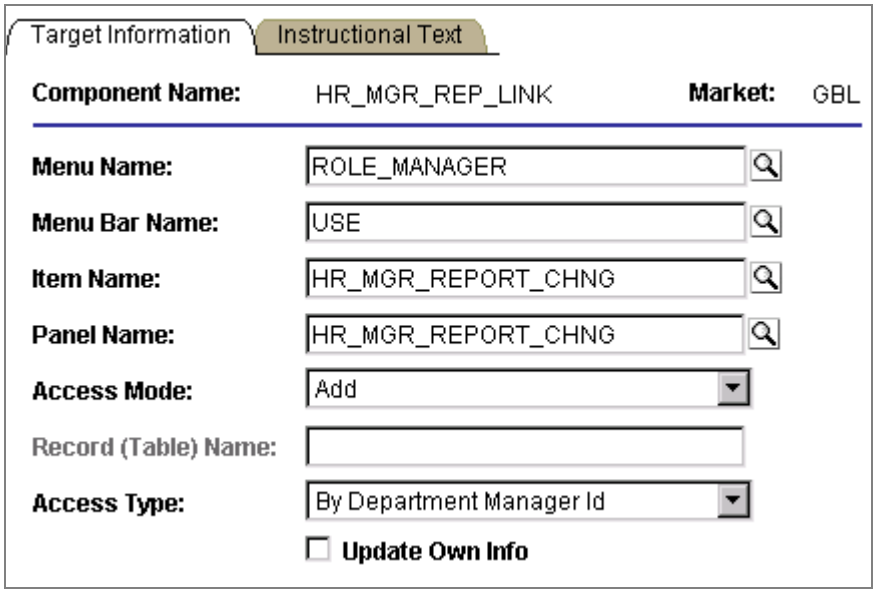
Note. This section does not apply to the manager role in PeopleSoft eRecruit Manager Desktop.

Pages Used to Set Up Security for Manager Self-Service Options

Page Name	Object Name	Navigation	Usage
Manager Self Service Options - Target Information	SS_LINK_TBL	Define Business Rules, Administer HR System, Setup, Manager Self Service Options, Target Information	Set up employee data access for the Manager self-service options.
Manager Self Service Options – Instructional Text	SS_LINK_TBL2	Define Business Rules, Administer HR System, Setup, Manager Self Service Options, Instructional Text	Add instructional messages to the Select Employee page for this transaction component.

Setting Up Employee Data Access for Manager Self-Service Options

Access the Manager Self Service Options - Target Information page.



Manager Self Service Options - Target Information page

To determine technical names of the system objects, use PeopleSoft Application Designer.

Component Name Enter the component name as defined on the menu in PeopleSoft Application Designer. 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 displays when the user selects a Manager self-service transaction from the Manager - Task

menu or Manager - View menu. It isn't the name of the transaction component.

The Select Employee page displays the list of employees that a user can select to view employee data.

Menu Name

Select ***ROLE_MANAGER.*** All Manager self-service transactions are delivered on this menu. To grant manager access to components on other menus, select the name of the menu that the component is on.

Menu Bar Name

Select the name of the menu bar that the transaction component is under.

Item Name

Enter the component's item name. The item name is the system name of the transaction component, not the component name of the Select Employee page.

The transaction component contains pages that the 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 name of the transaction page that the system displays first (usually the first page in the component) when a user selects an employee name.

Access Mode

Select which action the user performs in the transaction. Options are ***Add, Update/Display, Update/Display All,*** and ***Correction.***

Record (Table) Name

Enter the object name of the record that makes up the page of the transaction component.

Access Type

Select the option that defines the reporting relationship for the Select Employee page for this transaction component. Options are as follows:

By Department Manager ID: Defines the reporting relationship based on information in the Manager ID field on the Department Profile page. For users who are department managers, the system displays a list of the employees who are in the user's department.

By Reports To Position: Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of employees whose job record indicates that they report to that user's position.

By Supervisor ID: Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a

list of employees whose job records indicate that they are supervised by the user.

By Dept Security Tree: Determines employee data access using information from the security tree. The system presents the user with a list of employees whose data the user has access to, based on the security tree.

Update Own Info (update own information) — Select to allow managers to update their own information in this transaction component.

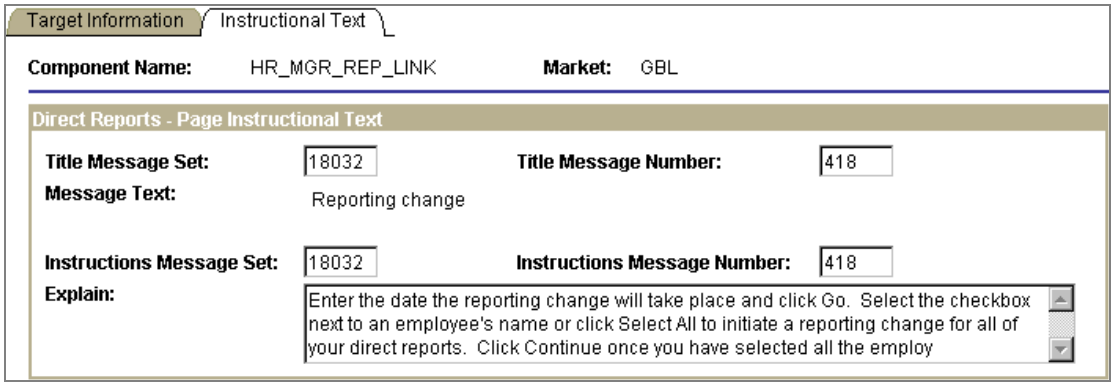
See Also

PeopleTools PeopleBook: Application Designer

Creating and Modifying Security Trees

Setting Up Transaction Instructional Messages

Access the Manager Self Service Options - Instructional Text page.



Manager Self Service Options - Instructional Text page

Direct Reports - Page Instructional Text

Title Message Set — Enter the title message set of the transaction instructions title that the system displays on this component's Select Employees page.

Title Message Number — Enter the title message number of the transaction instruction title that the system displays on this component's Select Employees page.

Message Text — Displays the text of the transaction instruction title that is associated with the **Title Message Number.** The system displays this text on this component's Select Employees page.

Instructions Message Set

Enter the number of the instructions message set for the instruction message that the system displays on this component's Select Employees page.

Instructions Message Number

Enter the message number of the instruction message that the system displays on this component's Select Employees page.

Explain

Displays the text of the instruction message that is associated with the Instructions Message Number. The system displays this text on this component's Select Employees page.

Tells the user how to select the employees whose data they want to view or manipulate.

CHAPTER 15

Using Pay Calendars

This chapter provides an overview of using calendars with PeopleSoft Payroll for North America and PeopleSoft Payroll Interface and discusses how to:

- Establish a pay run ID.
- Establish balances to be maintained.
- Create pay and FLSA calendars.

Note. This chapter does not apply to PeopleSoft Global Payroll.

See Also

PeopleSoft Global Payroll PeopleBook, "Using Calendars"

Establishing Pay Run IDs

A Pay Run ID identifies a single pay calendar to process. If you have several pay groups, you can process them together in a single run by assigning them the same Pay Run ID. To add a Pay Run ID, complete the Pay Run Table page.

Generally, all calendar entries that share a Pay Run ID have the same pay end date, but not necessarily the same pay frequency. For example, if you have a semi-monthly and a monthly pay calendar, both calendars can be processed together for the month-end run, because they have identical pay period end dates.

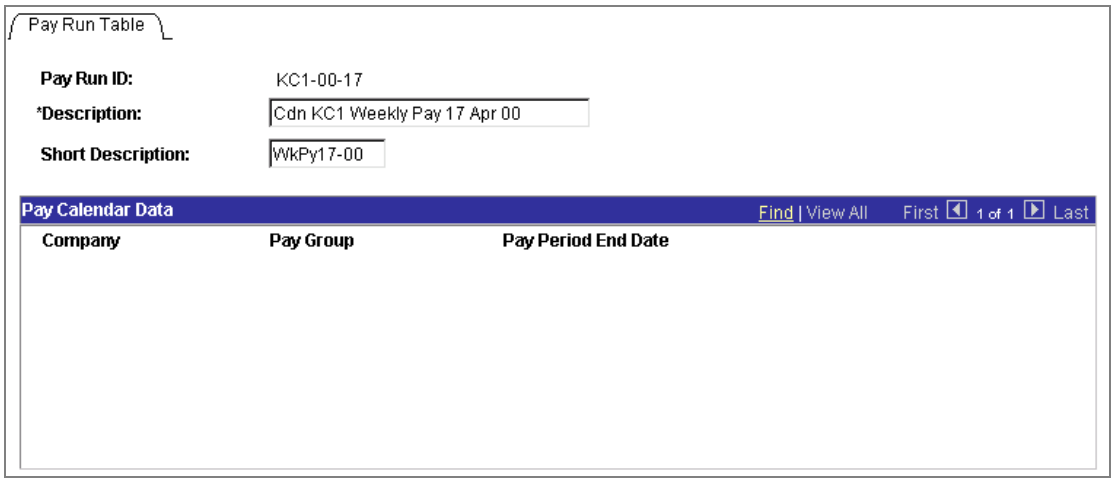
Note. A Pay Run ID must be unique throughout payroll history. You must create Pay Run IDs in the Pay Run Table before you enter them on the pay calendar. The Pay Run ID may be up to 10 characters. We suggest that you utilize as many of the 10 available characters as is necessary to ensure that your Pay Run ID is easily identifiable.

Page Used to Establish Pay Run IDs

Page Name	*Object Name*	*Navigation*	*Usage*
Pay Run Table	PAY_RUN_TABLE	Define Business Rules, Define Payroll Process, Setup 2, Pay Run Table Define Business Rules, Define Payroll Process (USF), Setup 2, Pay Run Table Define Business Rules, Define Payroll Interface, Setup, Pay Run Table	Define Pay Run IDs to combine pay calendar entries from different pay groups for processing.

Defining Pay Run IDs

Access the Pay Run Table page.



Pay Run Table page

Short Description Enter a short description of the pay run. This description appears on various delivered payroll reports (for example, PAY002, the Payroll Register). It also appears on the Run Control when you enter the Pay Run ID for Paysheet Creation, Payroll Calculation, and Payroll Confirmation.

Company, Pay Group, and **Pay Period End Date** The **Pay Calendar Data** group box displays all the pay calendar entries grouped under the Pay Run ID. After you enter the Pay Run IDs on the Pay Calendar Table, return to this page to check the pay calendar data assigned to each Pay Run ID.

Establishing Balances to be Maintained

This section provides an overview of balances and discusses how to:

- Create cycles and define your balance year.
- View setIDs established for each company.
- Define the actual quarter definition by company and year for each Balance Year ID.

Understanding Balances

PeopleSoft Payroll enables you to maintain balances by calendar year, fiscal year, benefit year, or any other method you want. You specify the start and end dates for each type of balance year you define, and the quarters, periods, and date ranges for each year. You can update, adjust, and report on balance information by various year types.

Note. You must set up a calendar year for each company for which you process payroll.

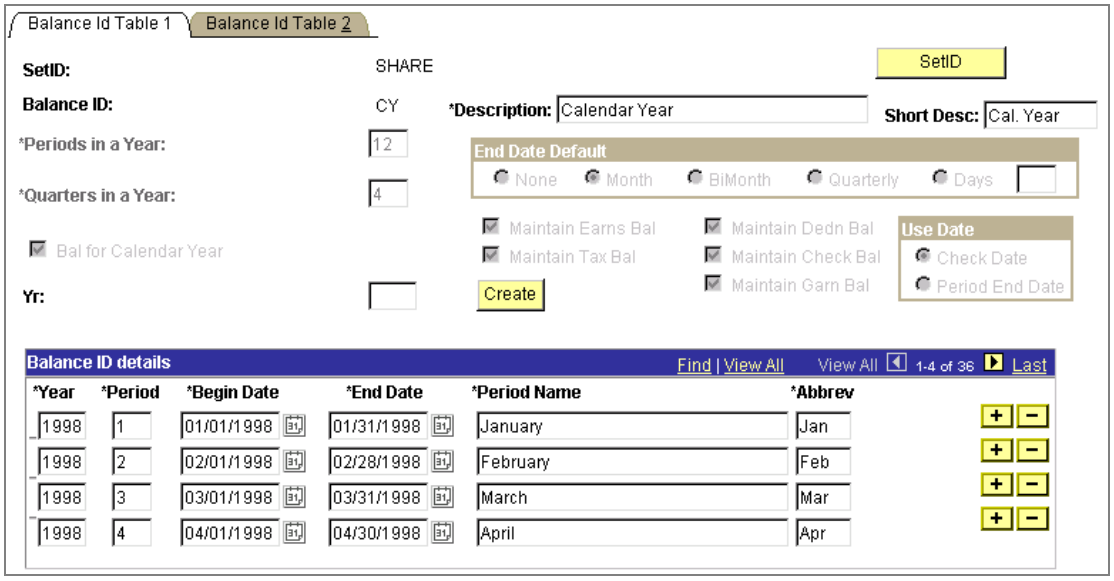
Pages Used to Establish Balances

Page Name	*Object Name*	*Navigation*	*Usage*
Balance ID Table - Balance ID Table 1	BALANCE_ID_TBL1	Define Business Rules, Define Payroll Process, Setup 2, Balance ID Table, Balance ID Table 1 Define Business Rules, Define Payroll Process (USF), Setup 2, Balance ID Table, Balance ID Table 1 Define Business Rules, Define Payroll Interface, Setup, Balance ID Table, Balance ID Table 1	Create cycles for payroll processing according to pay group and define your balance year.
SetID	BALANCE_ID_PU	Click the SetID button on the Balance ID Table 1 page.	View the setID established for each company.

Page Name	Object Name	Navigation	Usage
Balance ID Table - Balance ID Table 2	BALANCE_ID_TBL2	Define Business Rules, Define Payroll Process, Setup 2, Balance ID Table, Balance ID Table 2 Define Business Rules, Define Payroll Process (USF), Setup 2, Balance ID Table, Balance ID Table 2 Define Business Rules, Define Payroll Interface, Setup, Balance ID Table, Balance ID Table 2	Define the actual quarter definition by company and year for each Balance Year ID.

Creating Cycles and Defining Your Balance Year

Access the Balance ID Table - Balance ID Table 1 page.



Balance ID Table - Balance ID Table 1 page

Note. When defining balances to be maintained, you can create a *Calendar Year* or a *Non-Calendar Year.* If you are creating a Calendar Year, select the **Bal for Calendar Year** check box, enter a year in the **Year** field, and click the **Create** button—all other fields become unavailable for entry. However, if you are creating a Non-Calendar Year, you must specify the **Periods in a Year/Quarters in a Year, End Date Default, Use Date, Balance Type** check boxes, and **Balance ID Details.**

SetID — Click this button to access the SetID page, where you can see which balance setIDs are used for which companies. The SetID for the balance ID table is specified on the Company Table – Company Location page.

Periods in a Year — If you are not setting up a balance for a calendar year, specify the number of periods in a year.

Quarters in a Year — If you are not setting up a balance for a calendar year, specify the number of quarters in a year.

Bal for Calendar Year (balance for calendar year) — Select if you are setting up balances for a calendar year. This causes the remaining check boxes and edit boxes on the page (except for **Description** and **Short Desc)** to become unavailable for entry. All balance types are automatically selected for the calendar year, and the **Check Date** option is automatically selected. However, the **Yr** field and **Create** button appear and become available for entry.

Yr (year) — Enter the year for the balance type.

End Date Default

If you are not setting up a balance for a calendar year, use this group box to specify the end date to apply for the calendar year.

None — Select if you do not want a specific end date for the calendar year.

Month, BiMonth, Quarterly, Days — Select the corresponding option if you want a monthly, bimonthly, quarterly, or daily end date.

Maintain Earns Bal, Maintain Tax Bal, Maintain Dedn Bal, Maintain Check Bal, Maintain Garn. Bal — If you are not setting up a balance for a calendar year, select the corresponding check box to maintain earnings balances, tax balances, deduction balances, paycheck balances, or garnishment balances for the year you are creating.

Note. Each of these balances are maintained for the year being defined. For example, if you are defining a fiscal year and **Maintain Earns Bal** was selected, earnings balances for the fiscal year is maintained.

Use Date

If you are not setting up a balance for a calendar year, use this group box to select the balance types you want to maintain. You must set up the first period, begin date, and end date for each company and year. After you enter this, the begin and end dates are set by default automatically for each row for that company/year.

Check Date	Select to maintain balances by the check date being processed. For example, if you are defining a fiscal year of July 1, 1999 - June 30, 2000 and your Check Date was June 23, 2000, the balance would be included in this fiscal year. If, however, the Check Date were July 1, 2000, the balance would be in the next fiscal year.
Period End Date	Select to maintain balances by the period end date being processed. For example, if you are defining a fiscal year of July 1, 1999 - June 30, 2000 and your Check Date was June 23, 2000, the balance would be included in this fiscal year. If, however, the Check Date were July 1, 2000, the balance would be in the next fiscal year.
Create	Click this button to instruct the system to automatically populate the company, year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

Balance ID Details

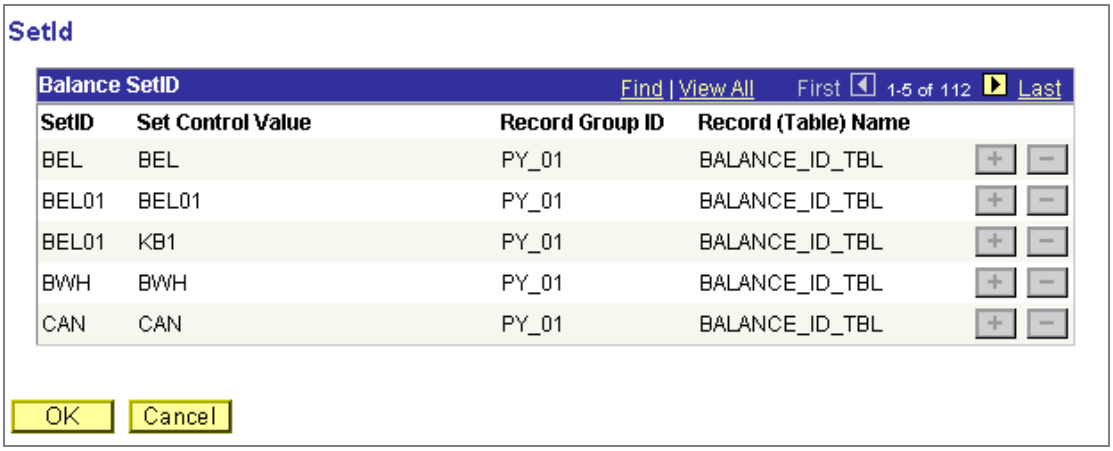
If you are not setting up a balance for a calendar year, use this group box to specify the year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

Note. You only need to set up the first entry for year, period, begin date, and end date. After you enter this information, the begin and end dates are set by default automatically for the other rows—based on the values entered in Periods in a Year and Quarters in a Year.

Year, Period, Begin Date, End Date, Period Name	Enter the year, period, begin date, end date, and period name for the balance type.
Abbrev (abbreviation)	Enter the abbreviation for the period name.

Viewing SetIDs Established for Each Company

Access the SetID page.

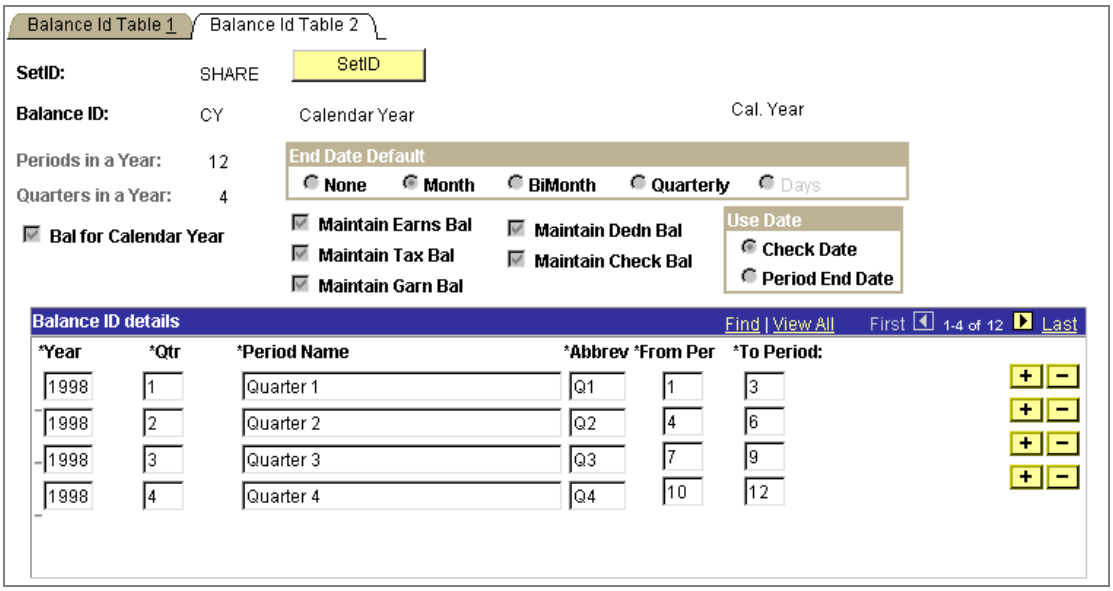


SetID page

The SetID page displays the SetID established for each company. This helps you to know which SetID to enter for a specific company.

Defining the Quarter by Company and Year for Each Balance Year ID

Access the Balance ID Table - Balance ID Table 2 page.



Balance ID Table - Balance ID Table 2 page

If you selected the Bal for Calendar Year check box and clicked the Create button on the Balance ID Table 1 page, the field information for the Balance ID Table 2 page automatically appears.

If you did not specify a balance type with a calendar year in the Balance ID Table 1 page, you must enter a value for the **Year, Qtr, Period Name, Abbrev, From Period,** and **Thru Period** fields. For each row you add after the first, the **From Period** field is set by default, based on the value in Quarters in a Year.

See Also

Creating Cycles and Defining Your Balance Year

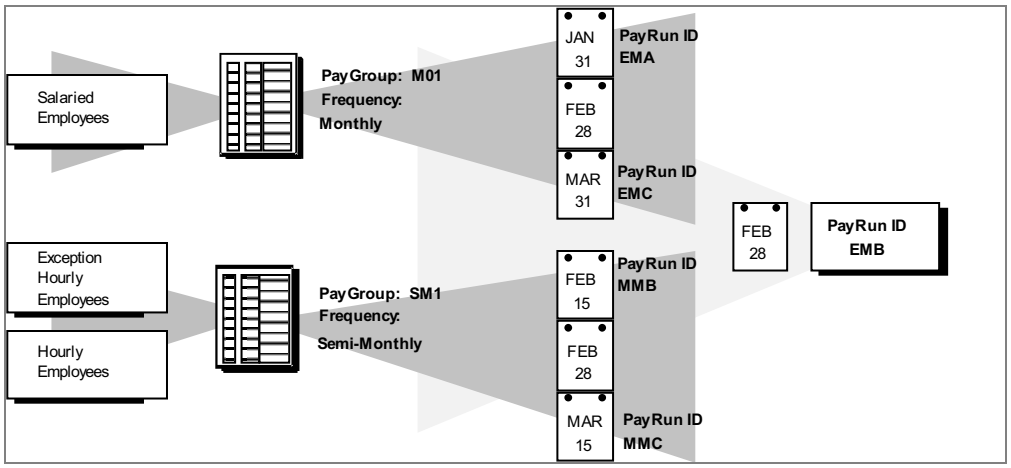
Creating Pay and FLSA Calendars

This section provides an overview of pay calendars and Pay Run IDs and discusses how to:

- Build pay calendars manually.
- Specify interface status and periods for Federal Leave Accrual processing.
- Set up FLSA Calendars.
- Run the Confirm Error process.
- Build pay calendars automatically.

Understanding Pay Calendars and Pay Run IDs

Use the pay calendar to schedule payroll cycles for your pay groups. In the Pay Calendar Table, you provide information regarding when pay periods begin and end. Use Pay Run IDs to indicate to the system which pay calendar entries to process together.



Assigning Pay Run IDs

Example

CCB, for example, has assigned the same Pay Run ID (EMB) to both the February 28 Monthly calendar entry and the February 28 Semimonthly entry to enable the system to process them at the same time.

Each entry on the Pay Calendar Table corresponds to a specific pay period, defined by its begin and end dates, for a pay group. A monthly pay group has 12 entries in the Pay Calendar Table, representing one year of processing.

Group pay calendar entries from different pay groups together for processing using a Pay Run ID, which you define on the Pay Run Table. To process payrolls, the pay calendar entry being processed must be assigned a run ID. Generally, all pay calendar entries that share a Pay Run ID have the same pay end date, but not necessarily the same pay frequency. Typically, but not always, you would set up a different Pay Run ID for each Pay Period End Date on the Pay Calendar Table.

For example, if you have a semi-monthly and a monthly pay calendar, you can process both calendar entries together for the month-end run, because they have the same pay period end date. Your processing schedule determines which groups can or can't be grouped together.

You can build the pay calendar manually or have the system do it for you automatically.

If you choose to build the pay calendar manually, you use the Pay Calendar Table for each calendar entry you want to add. Remember that you must have a calendar entry for every pay period for each pay group you set up.

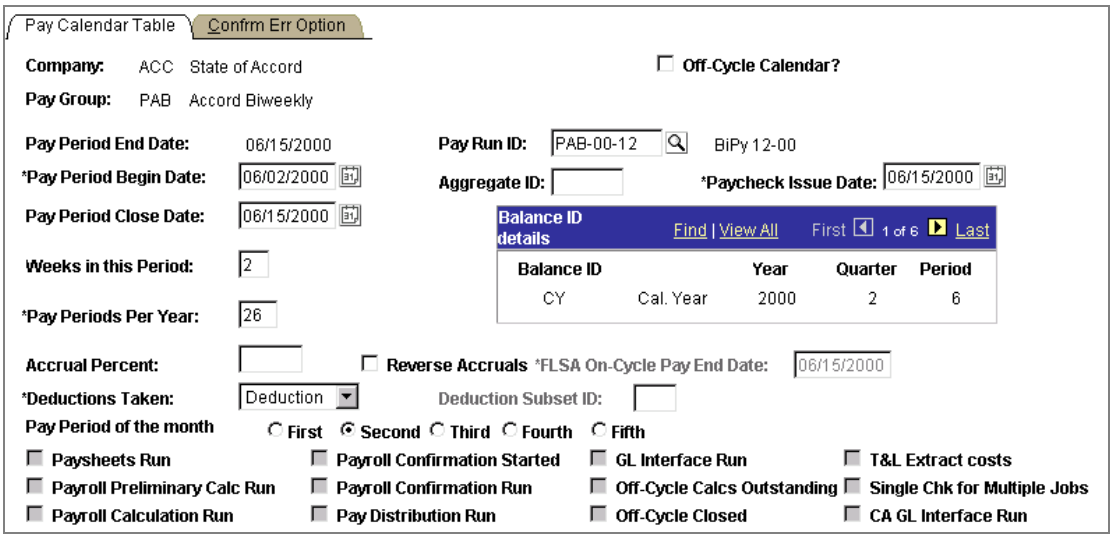
Pages Used to Create Pay and FLSA Calendars

Page Name	*Object Name*	*Navigation*	*Usage*
Pay Calendar Table - Pay Calendar Table	PAY_CALENDAR_TABLE	Define Business Rules, Define Payroll Process, Setup 2, Pay Calendar Table Define Business Rules, Define Payroll Process (USF), Setup 2, Pay Calendar Table Define Business Rules, Define Payroll Interface, Setup, Pay Calendar Table	Create pay calendars manually for payroll processing by pay group.
Payroll Status	GVT_PAY_STATUS_SEC	Click the Federal button on the Pay Calendar Table page.	Indicate whether interfaces have been run and specify periods for Federal Leave Accrual processing.

Page Name	*Object Name*	*Navigation*	*Usage*
Pay Calendar Table - Confirm Error Option	PAY_CALENDAR_TBL2	Define Business Rules, Define Payroll Process, Setup 2, Pay Calendar Table, Confirm Error Option Define Business Rules, Define Payroll Process (USF), Setup 2, Pay Calendar Table, Confirm Error Option Define Business Rules, Define Payroll Interface, Setup, Pay Calendar Table, Confirm Error Option	Run the Confirm process without addressing outstanding payroll messages.
FLSA Calendar Table	FLSA_CALENDAR	Define Business Rules, Define Payroll Process, Setup 2, FLSA Calendar Table Define Business Rules, Define Payroll Process (USF), Setup 2, FLSA Calendar Table	Set up FLSA calendars.
Pay Calendar Creation	RUNCTL_PAY_CAL_BLD	Compensate Employees, Manage Payroll Process (CAN), Process, Pay Calendar Creation, Pay Calendar Creation Compensate Employees, Manage Payroll Process (US), Process, Pay Calendar Creation, Pay Calendar Creation Compensate Employees, Manage Payroll Process (USF), Process, Pay Calendar Creation, Pay Calendar Creation Define Business Rules, Define Payroll Interface, Process, Pay Calendar Creation	Create a pay calendar automatically.

Building Pay Calendars Manually

Access the Pay Calendar Table - Pay Calendar Table page.



Pay Calendar Table - Pay Calendar Table page

Pay Period End Date

The pay period end date appears here. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determines if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day.

The pay calculation program uses these dates to determine which deductions and additional pays to use.

Pay Period Begin Date

Enter the pay period begin date. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determine if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day.

The pay calculation program uses these dates to determine which deductions and additional pays to use.

Weeks in this Period

Enter a value to indicate the number of weeks within the payroll cycle. Depending on the state in which your employees are based, you may need to use this field for tax reporting. The number of weeks is based on the number of Wednesdays in the pay period.

Pay Periods Per Year Enter a value to indicate the number of pay periods per year. When the system calculates deductions, it checks the deduction table, annualizes the amount of each deduction, and then divides the result by the number of pay periods per year.

Example

If you set up a deduction for $100 per month, the system multiplies $100 by 12 to arrive at $1200, and then, for employees paid monthly, divides by 12 to arrive at a deduction of $100 per pay period. For semi-monthly employees, the system divides the deduction by 24.

For weekly and biweekly pay periods, it is not quite so simple. Depending on the day of the week on which the payday falls, there may be 53 (instead of 52) weekly pay periods during a given year; likewise, there may be 27 (instead of 26) biweekly pay periods. To accommodate this situation, in the **Pay Periods Per Year** field, specify whether the pay calendar you're defining has 26, 27, 52, or 53 Pay Periods Per Year.

The system always annualizes amounts by multiplying by 52, 26, 24, or 12, depending on whether the deduction is weekly, biweekly, semimonthly, or monthly; it de-annualizes by dividing by the number you enter for the number of pay periods per year.

Note. For monthly and semi-monthly pay calendars, the **Pay Periods Per Year** field is unavailable for entry; the only valid values are ***12*** and ***24.***

Off-Cycle Calendar? Select to identify the pay calendar as off-cycle processing. Two types of processing are associated with a pay calendar: on-cycle and off-cycle. On-cycle processing is the normal, scheduled payroll processing for a pay group and pay period. Off-cycle processing is any other payroll activity that deviates from the norm. Typically, off-cycle activity consists of recording manual checks issued during this period, on-demand checks calculated and issued during this period, and reversals processed during this period. This option enables you to run a group of off-cycle checks that are associated with a specific check date which may differ from your on-cycle check date.

Pay Run ID Select a pay run ID. Each payroll batch process must have a pay run ID to determine what pay groups to process. All pay calendar entries with the same Pay Run ID are processed at the same time. Before you start payroll processing for a pay period, you must assign a Pay Run ID on this page, and that ID must first be defined on the Pay Run Table page. The Payroll Process cannot run without a Pay Run ID.

Aggregate ID Enter an aggregate ID to indicate aggregate taxation. Normally, you use the aggregate tax method when you must pay employees more than once in a single pay period. Every pay calendar with the same Aggregate ID

value is aggregated together (including Off-Cycle payrolls) for the purposes of tax calculations. All wages paid on each calendar with the same Aggregate ID are combined, then annualized and taxed accordingly. Typically this field is utilized by temporary agencies where employees are paid.

Example

An employee might be part of a weekly pay group and receive payment on Tuesday for work performed on Monday and Tuesday. On Wednesday, he might switch to a different, one-day job and be paid on that same day. The same employee might then work a third job on Thursday and Friday and receive a third payment on Friday. Using the ordinary annualized tax calculation method, each of these three checks would be taxed as if the earnings on each check were for an entire week, because the employee's pay period has been defined as weekly. The result would be that the total amount of taxes withheld for the week would be too low. To prevent this from happening use the aggregate tax method.

Paycheck Issue Date Select a paycheck issue date. This date appears on the employee's paycheck or advice slip. It determines the Calendar Year, Quarter, and Period for all payroll balances. In addition, the system uses the paycheck issue date to find the appropriate effective-dated entry in the tax tables to use for this pay calculation.

Balance ID Details

This group box displays the year, quarter, and period applicable to the pay period for each Balance ID for which you're maintaining balances.

Accrual Percent Enter an accrual percent to calculate accrual totals for the general ledger interface. This percentage is typically used to process pay periods that overlap accounting periods or don't correspond to calendar months. For example, if payroll is processed weekly, but general ledger is processed monthly, you may need to make adjustments. If you specify a percent here, that percent of pay for the last pay period of the month is added to accrual amounts for the general ledger Interface. Then, in the first pay period of the following month, you can reverse those accruals by selecting the **Reverse Accruals** check box and leaving the **Accrual Percent** field clear. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface.

Reverse Accruals Select to reverse accruals added to the General Ledger Interface. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface. However, if you select this check box, you must leave the **Accrual Percent** field clear. If the **Accrual Percent** field is not clear, the **Reverse Accruals** check box must be cleared.

Note. The **Accrual Percent** field and **Reverse Accruals** check box are not applicable to PeopleSoft Payroll for E&G.

FLSA On-Cycle Pay End Date Select a pay end date for FLSA off-cycle processing. This field applies only to off-cycle calendars. For on-cycle calendars, this field is unavailable for entry. If the earnings being paid in the off-cycle are subject to FLSA (Affect on FLSA check box on the Earnings Table – General page is *not* set to *None*), enter the on-cycle pay end date to which the earnings should be applied. The system uses this date to determine the correct FLSA period.

Deductions Taken Select a value to indicate how to take deductions for this pay run.

None: Select this value if you do not want to take a deduction.

Deduction: Select this value if you want to use the regular deductions defined on the Deduction Table pages for these employees.

Subset: Select this value if you want to use the specified deduction subset. If you select this value, the **Deduction Subset ID** field becomes available for entry. You must specify the subset ID in the **Deduction Subset ID** field.

Deduction Subset ID Select a value representing the subset ID for this pay run. This field becomes available for entry only when you select the ***Subset*** value in the **Deductions Taken** field.

Pay Period of the Month Use this option to assign a pay period to the earnings and deductions designated for this calendar entry. When you create paysheets, the system checks if the pay period for additional pay matches the pay period being processed, then adds the additional pay to the paysheet. During Pay Calculation, if the pay period for a deduction matches the pay period being processed, the system takes the deduction from gross pay. Select the corresponding option to specify the pay period of the month you want: ***First, Second, Third, Fourth,*** and ***Fifth.***

The following check boxes (**Paysheets Run, Payroll Preliminary Calc Run, Single Chk for Multiple Jobs,** and so on.) are unavailable for entry and maintained by the system.

(USF) Federal

Federal Click this button to access the Payroll Status page.

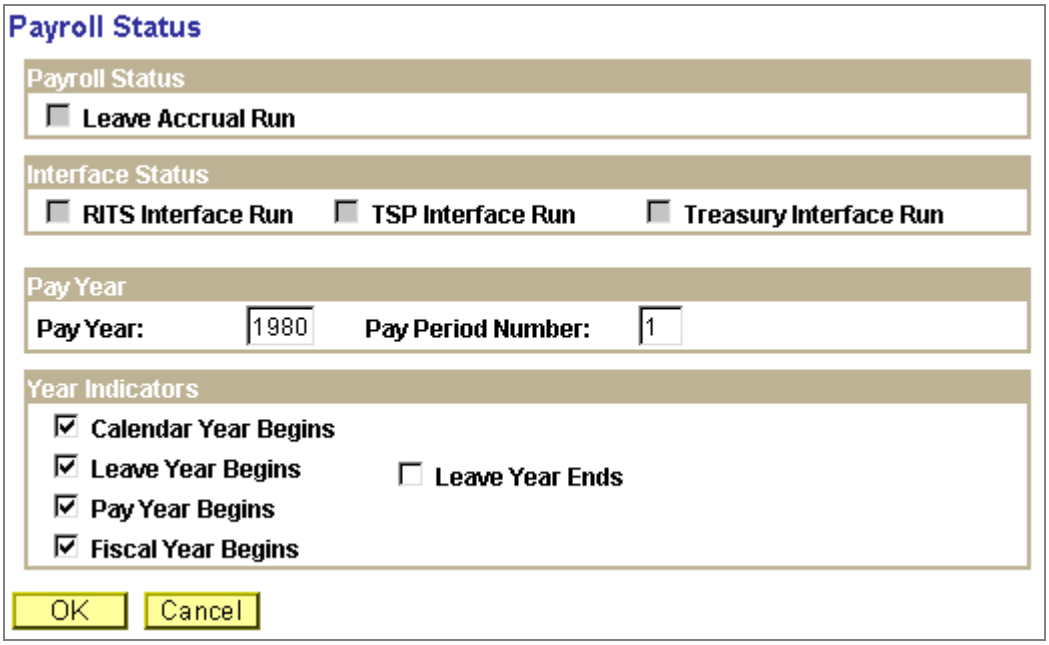
See Also

PeopleSoft Payroll for North America PeopleBook, "Working with Checks," "Adjusting Employee Balances" and "Defining Deductions"

Establishing Balances to be Maintained

(USF) Specifying Interface Status and Periods for Federal Leave Accrual Processing

Access the Payroll Status page.



Payroll Status page

Payroll Status

Leave Accrual Run Select if leave accrual has been run.

Interface Status

Use the check boxes in this group box to indicate whether the RITS Interface, TSP Interface, or the Treasury Interface has been run for the pay calendar.

Pay Year

Pay Year The IRR process requires a Pay Year. When processing IRRs, the IRR Fiscal Data Accumulator identifies all monies that come from the Pay Year. Enter the Pay Year to which this pay calendar applies.

Year Indicators

Calendar Year Begins — Federal Leave processing uses this check box. If the pay calendar is for a pay period designated to begin the Leave Plan Calendar Year for a particular Leave Type, select this check box.

Leave Year Begins — This check box is used by Federal Annual Leave Accrual processing only. If the pay calendar is for a pay period designated to begin the Annual Leave year, select this check box.

Note. The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

Pay Year Begins — This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Pay Year. If the pay calendar is for a pay period designated to begin the Pay Year for Leave Accrual processing, select this check box.

Fiscal Year Begins — This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Fiscal Year. If the pay calendar is for a pay period designated to begin the Fiscal Year for Leave Accrual processing, select this check box.

Leave Year Ends — This check box is for your information only. It enables you to identify the pay calendar that is intended to represent the leave year end.

Reviewing Payroll Milestones

The check boxes across the bottom of the Pay Calendar Table page are unavailable for entry. The system maintains this section, which consists of process indicators, or milestones, that indicate how far along you are in the payroll process for this calendar entry. For example, if you have already created paysheets, completed your final Pay Calculation, and run Pay Confirmation, the system selects several check boxes on the Pay Calendar Table page, representing the steps you have already completed.

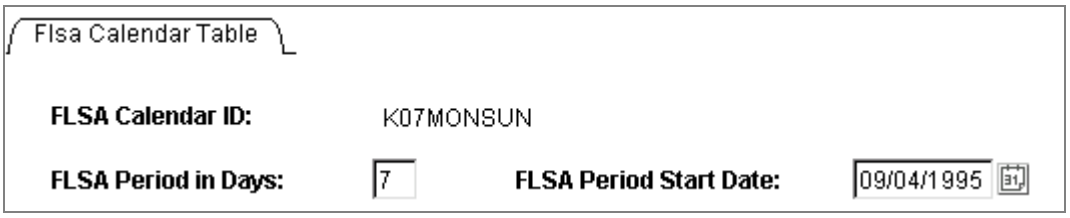
The batch programs and SQRs maintain these indicators. During payroll processing, the system queries these indicators to verify that you are running the payroll batch processes in the correct order.

You should run your GL Interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL Interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If GL interface run is selected, you cannot rerun the process until resetting the check box and it has no effect on processing adjustments for the pay period. You can still run adjustments until the Off-Cycle Closed check box is selected.

After a payroll is confirmed for the next Pay Period, the system selects the Off-Cycle Closed check box, and you can no longer run off-cycle payrolls against this calendar.

Setting Up FLSA Calendars

Access the FLSA Calendar Table page.



FLSA Calendar Table page

You must define FLSA calendars for each pay group in your company that has distinct FLSA periods and FLSA period start dates. If several pay groups have the same FLSA periods and FLSA period start dates, you can use the same FLSA calendar for all of them. The same process that creates pay calendars also creates FLSA Calendars.

FLSA Calendar ID The FLSA Calendar ID that you added or selected in the entry page displays here. Use the FLSA Calendar ID to link an FLSA calendar to a pay group. For example, an FLSA Calendar ID of ***14, MON-SUN,*** would be linked to pay groups whose pay period is 14 days and whose FLSA pay period begins on Monday and ends on Sunday. This ID is then used on the FLSA Period Definition page to associate the FLSA calendar to the pay group.

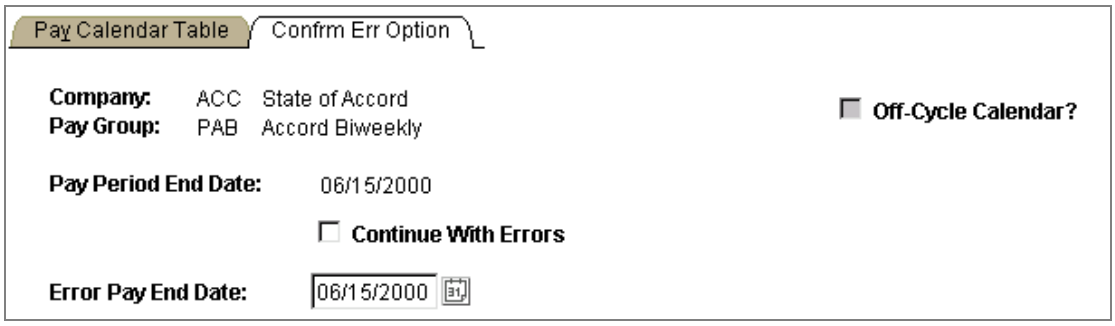
FLSA Period in Days Use this field to define the length of the FLSA period for this Calendar ID. The information you enter here is used with the FLSA Period Start Date to determine the FLSA Begin Dates and FLSA End Dates, which display on this page after you've created FLSA calendars.

FLSA Period Start Date Use this field to define the starting date from which succeeding FLSA periods are set. You should set this field to the earliest start date of any of the pay groups that use this FLSA Calendar ID.

Note. After you create the FLSA calendar from the Pay Calendar build, the FLSA Calendar Table page becomes display-only. Each row in the display-only part displays the FLSA Begin and End Dates for one FLSA work period. After you create the FLSA calendar and it becomes display-only, you cannot make any changes or corrections. If you run a payroll later that does not have an FLSA calendar already created, you have to run the Pay Calendar build. The additional FLSA calendars are created when the pay calendar for that payroll is created. Additionally, you must add the FLSA Calendar ID to the system before you can complete the Pay Group Table. This does not apply for pay groups that are defined as Fixed FLSA Period and have Use Basic Formula selected on the FLSA Period Definition page.

Running the Confirm Error Process

Access the Pay Calendar Table - Confirm Error Option page.



Pay Calendar Table - Confirm Error Option page

You can use this page to select which payroll messages to bypass during the Confirm process and to indicate the number of times each message can be bypassed before stopping the Confirm process.

Continue With Errors Select this check box if you want the payroll process to continue when the system encounters error messages that are defined for the Continue With Errors functionality.

Error Pay End Date Select an error pay end date that represents the end date of the off-cycle payroll in which you want to correct and pay the employees who are bypassed during the regular pay run.

Off-Cycle Calendar? If you selected this check box on the Pay Calendar Table page, this check box is selected—if you did not, the check box is clear.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Tables that support the Payroll Process," Reviewing and Modifying Payroll Messages

Building Pay Calendars Automatically

Access the Pay Calendar Creation page.



Pay Calendar Creation page

You may want to run the Pay Calendar Creation (CALENDAR) batch process to automatically build the pay calendar entries for all or part of a year. To build a pay calendar automatically, you must create the run control data on the Pay Calendar Creation page, run the Pay Calendar creation program, and review any error messages.

The Pay Calendar Creation process doesn't automatically assign values to Pay Run ID, Accrual Percent, Reverse Accrual, Aggregate ID, Off-cycle Pay End Date, Deduction Subset ID, or Deduction Taken.

After you run the batch program, you must complete the appropriate fields on the Pay Calendar Table before you start running your payroll. Although Accrual Percent and Reverse Accrual are optional, all pay calendars must have a Pay Run ID before you run the payroll.

Remember that you need to follow the same steps for each pay group. Each time you run the Pay Calendar Creation process, the system deletes the control data. Therefore, whenever you need to rerun the process, you must enter the control data again.

Pay Period End Date Enter a pay period end date for the pay calendar. For example, for a semi-monthly payroll for 1999, enter ***01/15/99.*** To build a pay calendar for a partial calendar year, enter the end date of the pay period where you want the calendar to start. In other words, to start the calendar for the pay period ending on March 15, enter ***03/15/99.***

Check Dt Days From Pay End Dt Enter a value representing the number of days (plus or minus) from the pay period end date to the check issue date. For example, if the pay period end date is January 31 and the check date is February 3, set the number of days to ***3.*** If the pay period end date is January 31 and the check date is January 30, enter ***-1.*** Should the check date fall on a holiday or weekend day, the system automatically searches backwards on the calendar to find the first workday before the holiday or weekend day to issue checks.

Pay Periods Per Year	The number of pay periods per year appears. This number depends on the Pay Frequency assigned to the pay group.
Run	Click to access the Process Scheduler request page, where you can specify where a process or job runs and the process output format.

(USF) Federal Fields

Define Years

Use this Federal group box to define the year type for calendar entries.

Calendar Year Run	Enter the calendar year run to indicate the calendar entries to be created and specify which one is the first run of the calendar year.
Fiscal Year Run	Enter the fiscal year run to indicate the calendar entries to be created and specify which one is the first run of the fiscal year.
Pay Year Run	Enter the pay year run to indicate the calendar entries to be created and specify which one is the first run of the pay year.
Leave Year Run	Enter the leave year run to indicate the calendar entries to be created and specify which one is the first run of the leave year.

Note. You can change the values for **Pay Year, Calendar Yr Run, Fiscal Yr Run, Pay Yr Run,** and **Leave Yr Run** by clicking the Year Settings button on the Pay Calendar Table page.

Reviewing Error Messages

You perform the following actions to review error messages.

1. Click the Process Request button to execute the specified process.
2. Click the Process Monitor link to determine whether the process is complete.
3. After the process is complete, click the Details link to generate the Message Log link.
4. Click the Message Log link to review the steps performed during processing.

   There may be a Check Messages!!! note displayed next to one of the processing steps (see sample message log).

```
PeopleSoft Payroll -- Version 8.00
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All Rights Reserved

On-Cycle Calculation started for Run: 700
 at 11:28:12.01.
Checking PaySheet Update for Company: SCA
                              Pay Group: SS5
                              Pay End Date: 2000-12-15
 at 11:28:12.35.
       3 new employee(s)/job(s) added.
      69 employee(s)/job(s) checked for update.
       1 employee(s)/job(s) had their paysheet updated.
Checking PaySheet Update ended at 11:28:33.10.
Calculation started for Company: SCA
                         Pay Group: SS5
                         Pay End Date: 2000-12-15
 at 11:28:38.31.
   220  check(s) to calculate.
Start employee processing at 11:28:39.17.
Commit processed at 11:29:11.32.
Check Messages!!!
Commit processed at 11:29:22.76.
Commit processed at 11:29:34.87.
Commit processed at 11:29:44.89.
Calculation ended at 11:29:50.67.
```

Sample message log

5. You can check the messages online or by printing a report.

Note. To view the messages online select **Compensate Employees, Manage Payroll Process (US) (USF) (CAN), Inquire, Payroll Error Messages**. The Payroll Error Messages report (PAY011) lists errors related to employee data and tables.

See Also

PeopleTools PeopleBook: Process Scheduler

Creating Cycles and Defining Your Balance Year

CHAPTER 16

Setting Up Vendors

This chapter provides an overview of vendors and explains how to enter vendor information.

Overview of Vendors

A vendor is any agency or organization that the company sends money to on behalf of an employee or that the company has withheld from an employee's paycheck. Vendors can be:

- Benefit providers
- Garnishment payees
- Tax collectors

The system stores information about the vendor in the vendor table. It holds the information necessary to make payments to a vendor and the policy information for a benefit provider.

Integrating with PeopleSoft Payables

If you are using PeopleSoft Payables to pay your vendors, it is recommended that you enter a vendor using PeopleSoft Payables and export the vendor table to PeopleSoft Human Resource Management System (HRMS). You can enter vendors through the PeopleSoft HRMS and it will be exported to the PeopleSoft Payable system. However, any changes to existing vendors that are made through PeopleSoft HRMS will not be exported to the PeopleSoft Payables system.

PeopleSoft Payables, Payroll for North America, and Payroll Interface use publish and subscribe methodology to populate each other's Vendor Tables. The two application messages used to publish and subscribe are called:

VENDOR_SYNC, which is an incremental publish and subscribe messaging.

VENDOR_FULLSYNC, which is a full table publish and subscribe messaging.

The primary difference between the Incremental and the Full Table messages is that the Incremental messages process individual whereas the Full Table messages process all vendors on the table.

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

Entering Vendor Information

To enter vendor information, you will complete the following pages:

- Vendor Control
- Addresses
- Locations
- Contacts
- Policy Information

Vendor Control

This is used only if you want PeopleSoft Payables to pay the vendor. It provides a mechanism for identifying the different types of vendors.

Vendor Information

This page creates the vendor code and identifies the name and type of vendor you are entering.

Addresses

This is a strictly address information and should not be confused with location. You can enter multiple addresses for the different sites a vendor might have.

Location

A vendor location is not a physical address. It is a default set of rules, or attributes, which define how you conduct business with a particular vendor. A vendor's location comprises information such as payment terms, remittance information, bank account information, and so on. Although a location is not an address, it will reference addresses.

Your vendor may need only one location. If the vendor uses the same set of rules across its business, you can simply enter one location for your vendor, and you're ready to go. If, however, your vendor uses different sets of rules for different portions of its business (different branches, sites, or offices, for example) you can set up the vendor with multiple locations, each with its own unique set of business rules.

Contacts

This page is used to enter information about the people whom you contact on a regular basis. You can enter an unlimited number of vendor contacts and identify their roles so that you can

easily determine whom you should contact if you have questions, or discern why a contact might want to talk to you, before you return their call.

Policy Information

Policy information is necessary for benefit providers. You will link this vendor and policy information using the Benefit Plan table in Base Benefits.

Pages Used to Set Up Vendors

Page Name	*Object Name*	*Navigation*	*Usage*
Vendor Control	VNDR_CNTRL	Varies according to vendor type.	Identify the prefix assigned to the vendor in PeopleSoft Payables.
Vendor Information	VNDR_ID1	Varies according to vendor type.	Enter basic vendor information.
Addresses	VNDR_ADDRESS	Varies according to vendor type.	Enter a vendor's address information.
Alternate Names	VNDR_ADDR_ALTN	Click Alternate Names on the Addresses page.	Enter any alternate name for use on payments.
Phone Information	VNDR_ADDR_PHN	Click Telephone on the Addresses page.	Enter a vendor's phone information for addresses. You can enter more than one phone number per address.
Email Id	VNDR_ADDR_EMAILID	Click Email Id on the Addresses page.	Enter a vendor's email addresses.
Locations	VNDR_LOC	Varies according to vendor type.	Enter address and remittance information.
Bank Accounts	VNDR_BANK_ACCOUNT	Click Bank Accounts on the Locations page.	Enter banking information for the vendor.
Bank Address	BANK_ACCT_ADDR_SEC	Click Bank Address on the Bank Accounts page.	Enter the bank's address information.
Phone Details	BANK_ACCT_PHON_SEC	Click Phone Details on the Bank Accounts page.	Enter phone information for the bank.

Page Name	Object Name	Navigation	Usage
Comments	VNDR_LOC_COMMENTS	Click Comments on the Locations page.	Enter notes or comments about locations.
Payment Options	VNDR_PAY	Click Payment Options on the Locations page.	Enter payment processing rules for the vendor location.
Contacts	VNDR_CNTCT	Varies according to vendor type.	Enter a vendor's contact person. Enter more than one phone number if necessary.
Telephone	VNDR_CNTCT_PHN	Click Telephone on the Contacts page.	Enter a contact's telephone information.
Policy Information	VNDR_POLICY	Varies according to vendor type.	Enter information about policies and whom to contact about them.
Garnishment Payee Table	GVT_GARN_PAYEE	Define Business Rules, Define Payroll Process (USF), Setup 1, Garnishment Payee Table	Enter garnishment payee contact information for U.S. federal government.
Deduction Distribution Information	GVT_GARN_DIST_SEC	Click the Distribution Information button on the Garnishment Payee Table page.	Enter garnishment payee distribution information for U.S. federal government.

Alternate Navigation

Define Business Rules, Define AP Interface, Setup, Vendor Information

Define Business Rules, Define Base Benefits, Setup, Provider/Vendor Table

Define Business Rules, Define General Data (NLD), Setup, Provider/Vendor Table

Define Business Rules, Define Payroll Process, Setup 1, Garnishment Payee Table

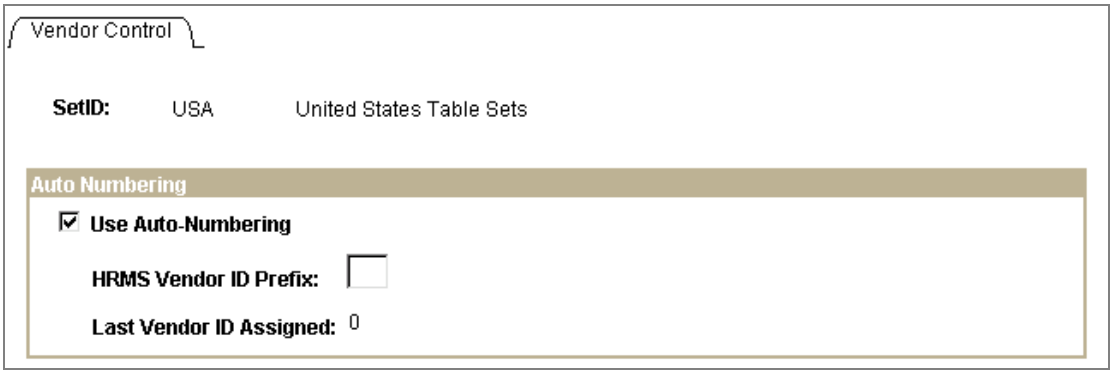
Define Business Rules, Define Payroll Process (USF), Setup 1, Garnishment Payee Table

Define Business Rules, Define Payroll Taxes, Setup, Tax Collector Table

Define Business Rules, Define Payroll Taxes (USF), Setup, Tax Collector Table

Identifying Vendor Prefixes

Access the Vendor Control page.



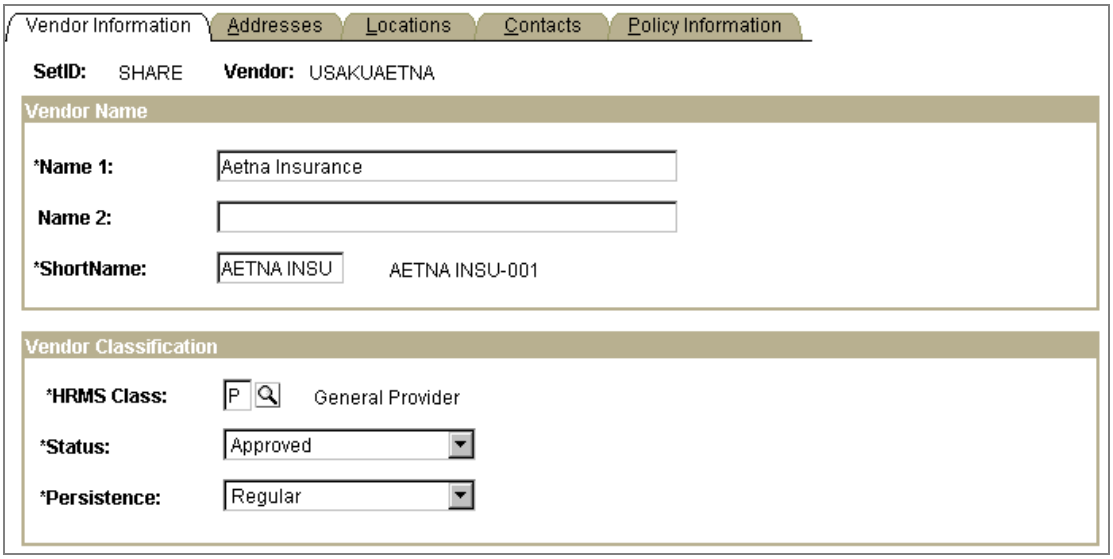
Vendor Control page

Use Auto-Numbering PeopleSoft Payables has the option of using an autonumbering feature to assign IDs to new vendors.

HRMS Vendor ID Prefix If you selected the auto-numbering check box, enter a prefix that is used identify HRMS vendors.

Entering Basic Vendor Information

Access the Vendor Information page.



Vendor Information page

Name1 Enter the payee name as it should appear on the check.

HRMS Class (HRMS classification) This field identifies the HRMS classification used to create views so you see the appropriate vendors on the appropriate tables.

It is also used to identify tax and non-tax deductions when the system extracts deductions to create AP vouchers.

Available values are:

General Deduction (D)
Garnishment Payee (G)
National Health Service Provider (H)
Industrial Insurance Board Provider (I)
General Provider (P)
Tax Collector (T)

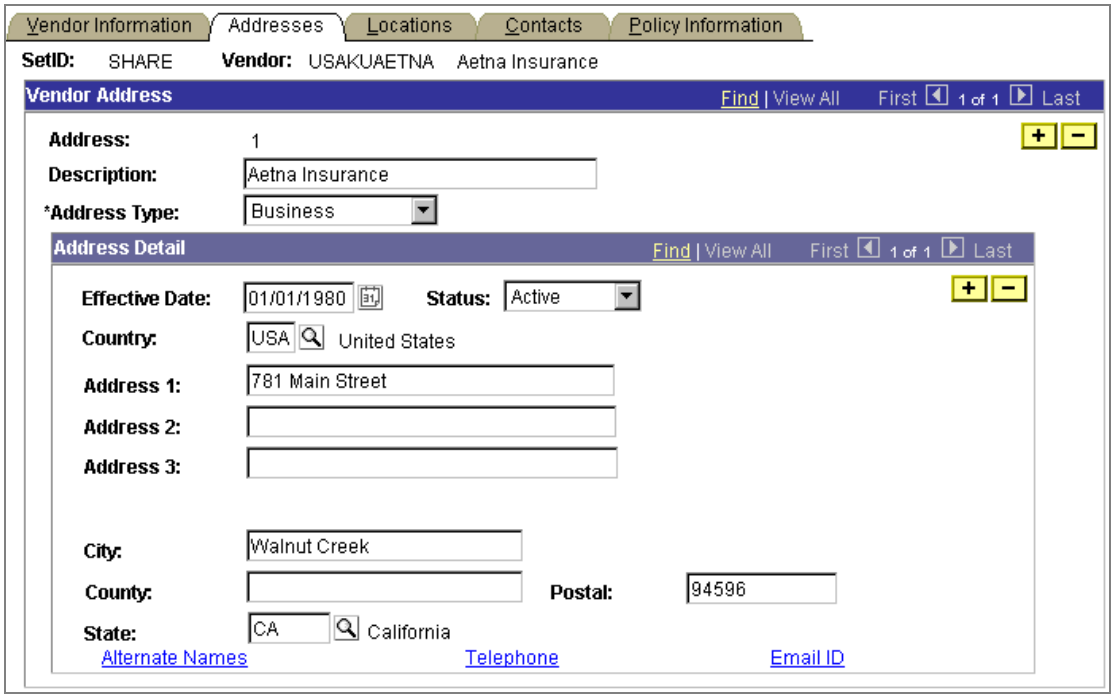
For benefit providers, select ***P*** for General Provider.

Status For HRMS vendors, select ***Approved***. The other values are used by PeopleSoft Accounts Payable.

Persistence For HRMS vendors, select ***Regular.*** The other values are used by PeopleSoft Accounts Payable.

Entering Vendor Address Information

Access the Addresses page.



Addresses page

Address Type Enter the one or more addresses for the vendor.

If you are using PeopleSoft Payables at least one address should be the remittance address. This is the address that is used when creating payment vouchers.

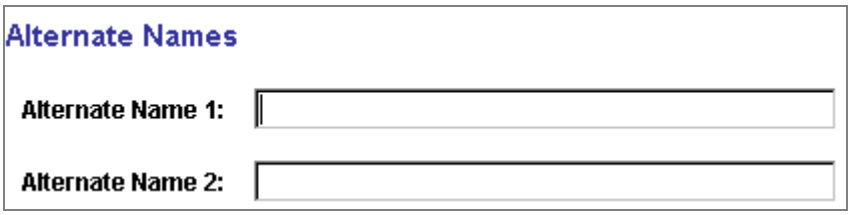
Premium Payment and ***Remittance*** are the only valid address types for deduction recipients. If any other

address type is displayed for this vendor, contact your Accounts Payable department.

Premium Payment generally applies to benefit deductions and ***Remittance*** applies to all other types of deductions including taxes.

Displaying Alternate Names for Use on Payments

Access the Alternate Names page.



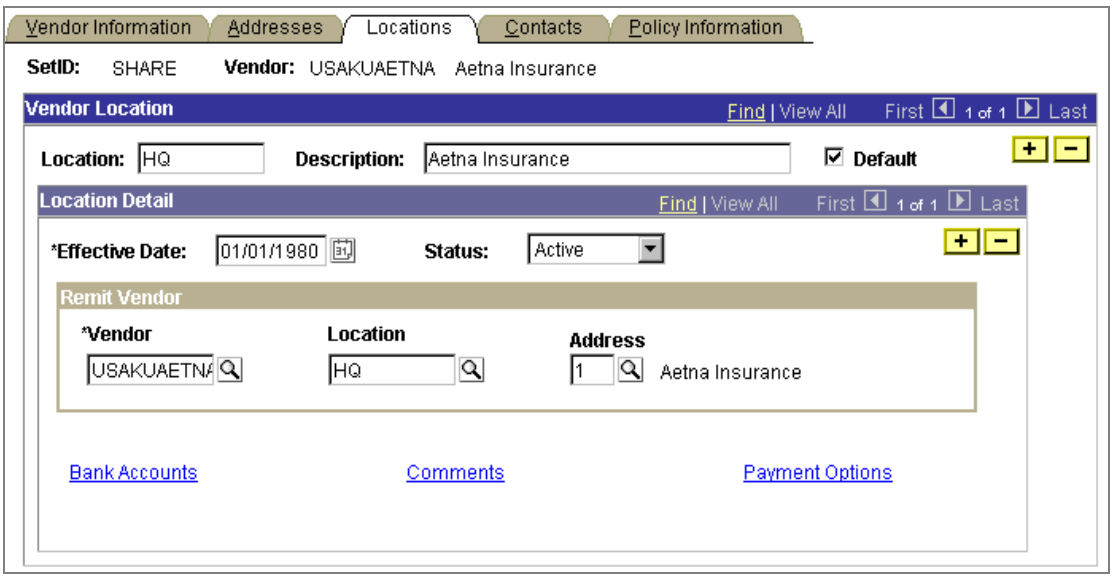
Alternate Names page

Alternate Name 1 and **Alternate Name 2**

When the system generates payments for the location using this address, PeopleSoft Accounts Payable needs to use a name different from the one entered on the Vendor Information page, enter the name here.

Identifying Vendor Locations

Access the Provider/Vendor Table - Locations page.



Provider/Vendor Table - Locations page

Location Enter an identifier for the location information you are entering. If more than one location is set up for the vendor, you can use the previous page and next page links on the Vendor Location bar to display information for the location in which you're interested.

Default Select this check box if you want this location to automatically print on the vouchers for this vendor. Only one location can be selected as the default.

Remit Vendor This is the information about the vendor to whom payments will be sent. You need to select the codes that identify the name of the vendor receiving the payments, vendor location, and address where the payment is sent.

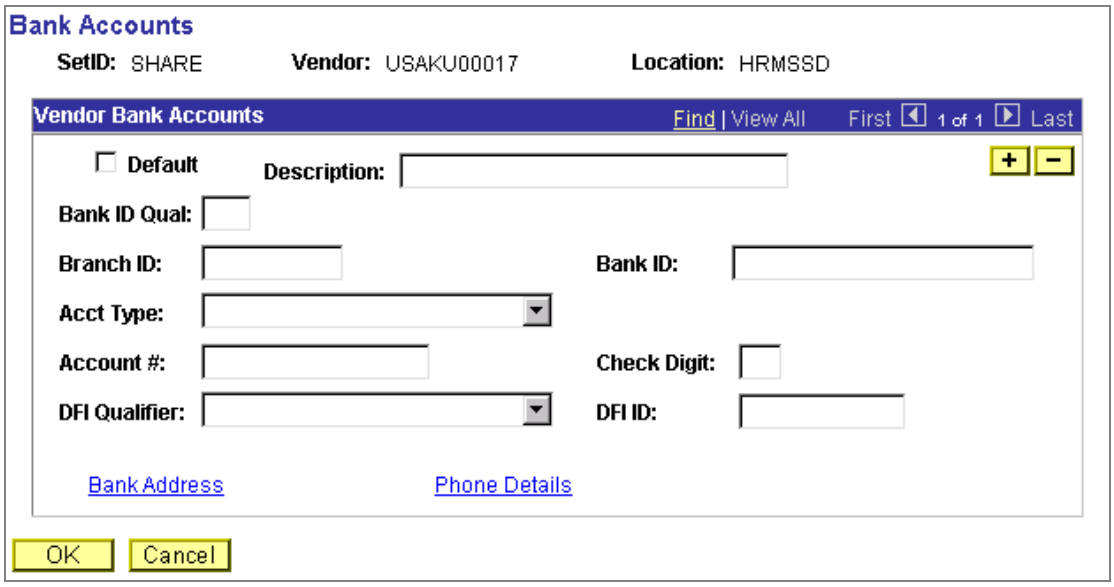
Bank Accounts Click this link to display the Bank Accounts page. Work with the Payroll department to set up this information.

Comments Click this link to display the Comments page.

Payment Options Click this link to display the Payment Options page. Work with the Payroll department to set up this information.

Entering Bank Account Information

Access the Bank Accounts page.



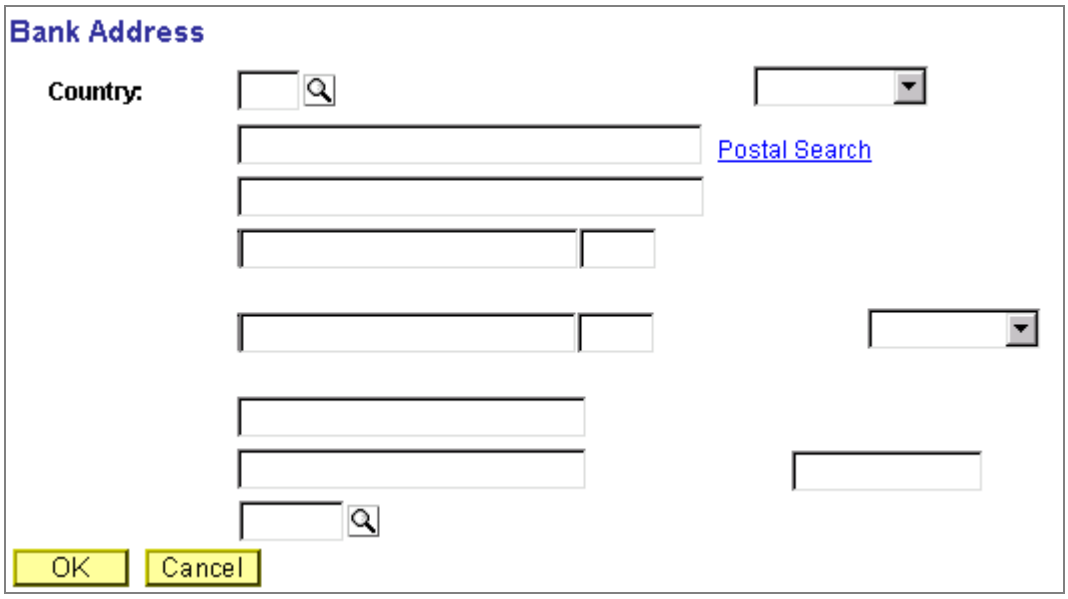
Bank Accounts page

Default The **Default** check box is selected if this is the default bank account for the location. The default bank account is copied to each payment schedule for this vendor.

Bank ID Qual	The country-specific numeric value by which the bank/counterparty is identified. This value controls how the bank/counterparty pages edit and display bank information.
Branch ID	The branch ID for the bank, if appropriate.
Bank ID	The **Bank ID** for the bank.
Acct Type	The account type for the bank, ***Bond, Checking Account,*** and ***Life Insurance,*** for example.
Account #	The vendor's bank account number.
Check Digit	The check digit used by the bank.
DFI Qualifier	If you make automatic clearing house (ACH), wire, or EFT payments to this vendor location, this field should display the appropriate DFI Qualifier: The value determines the format for the **DFI ID** field. • ***Transit Number:*** The DFI ID is exactly 9 digits, plus check digit calculation. • ***Swift ID:*** The DFI ID is 8 or 11 characters; positions 5 and 6 must be a valid 2-character country code. • ***CHIPS ID:*** The DFI ID is 3 or 4 digits. • ***Canadian Bank Branch/Institute*** and ***Mutually Defined:*** No validation for DFI ID. The **DFI Qualifier** determines the format of the bank's **DFI ID.**
DFI ID	The bank's **DFI ID.** The format is determined by the value displayed in the **DFI Qualifier** field.
Bank Address	Select **Bank Address** for the Bank Address page.
Phone Details	Select **Phone Details** for the Phone Details page.

Entering Bank Address Information

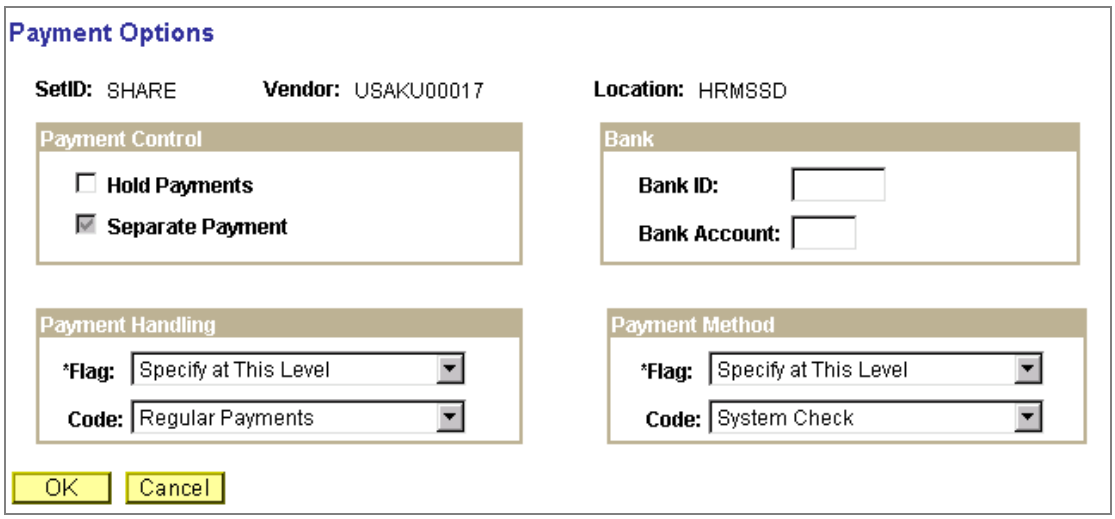
Access the Bank Address page.



Country The bank's **Country** defaults from the Bank Accounts page. The form of the address fields varies, depending on the country.

Entering Payment Processing Information

Access the Payment Options page.



Payment Options page

Payment Control

Hold Payments If this check box is selected, PeopleSoft Payables automatically places payments for this vendor on hold.

Separate Payment If this check box is selected, PeopleSoft Payables creates a

separate payment for each voucher, even if the system processes multiple vouchers for the vendor in the same pay cycle.

Bank

Bank ID The code for the bank from which you want to make payments for this vendor.

Bank Account The account from which payments will be made to this vendor.

Payment Handling

Flag This field determines the payment handling instructions.

Default from Higher Level: The payment handling instructions for the vendor come from the control hierarchy.

Specify at this Level: The payment handling instruction for the vendor appears in the **Code** field.

Payment Method

Code If you select Specify at this Level in the **Flag** field, this field displays the payment handling instructions your accounts payable department follows when issuing payments for this vendor:

- ***High Dollar Processing.***
- ***Internal Distribution.***
- ***Regular Payments.***
- ***Route to Purchasing.***

Payment Method

Flag This field determines the payment method:

Default from Higher Level: The payment method for the vendor comes from the control hierarchy.

Specify at this Level: The payment method for the vendor appears in the **Code** field.

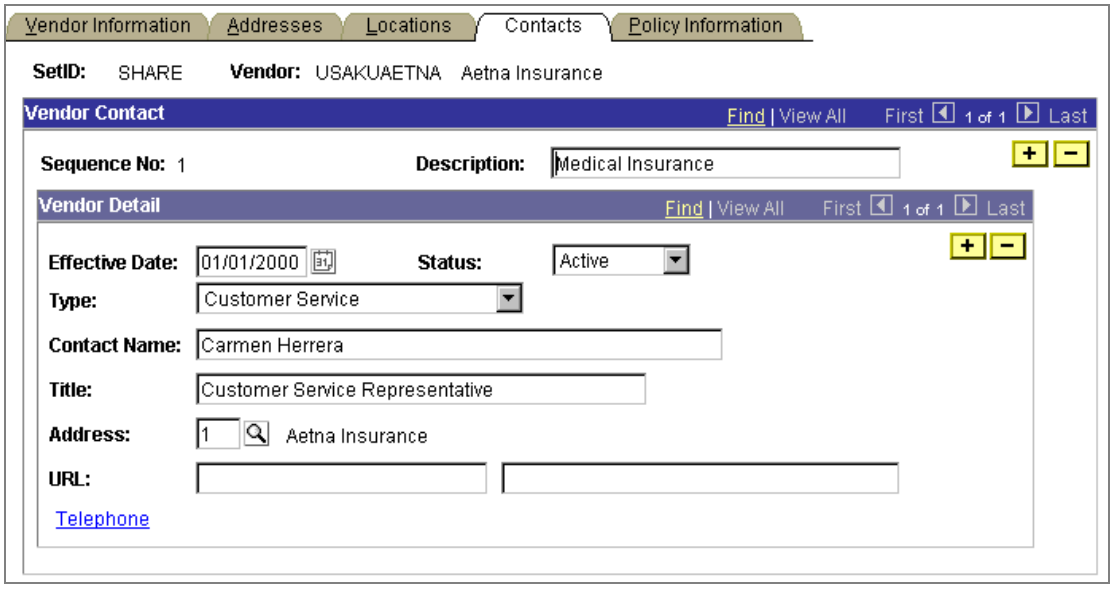
Code If you select Specify at this Level in the **Flag** field, this field displays the payment method for this vendor:

- ***Automatic Clearing House.***
- ***Customer Initiated Draft.***
- ***Direct Debit.***

- ***Draft - Customer EFT.***
- ***Electronic Funds Transfer (EFT).***
- ***Giro - EFT.***
- ***Giro - Manual.***
- ***Letter of Credit.***
- ***Manual Check.***
- ***System Check.***
- ***Treasury Wire Flat File.***
- ***Vendor Initiated Draft.***
- ***Wire Report.***

Entering Vendor Contact Information

Access the Contacts page.



Provider/Vendor Table - Contacts page

Sequence No (sequence number) — This number is automatically assigned to this contact.

Type — Select the type of contact.

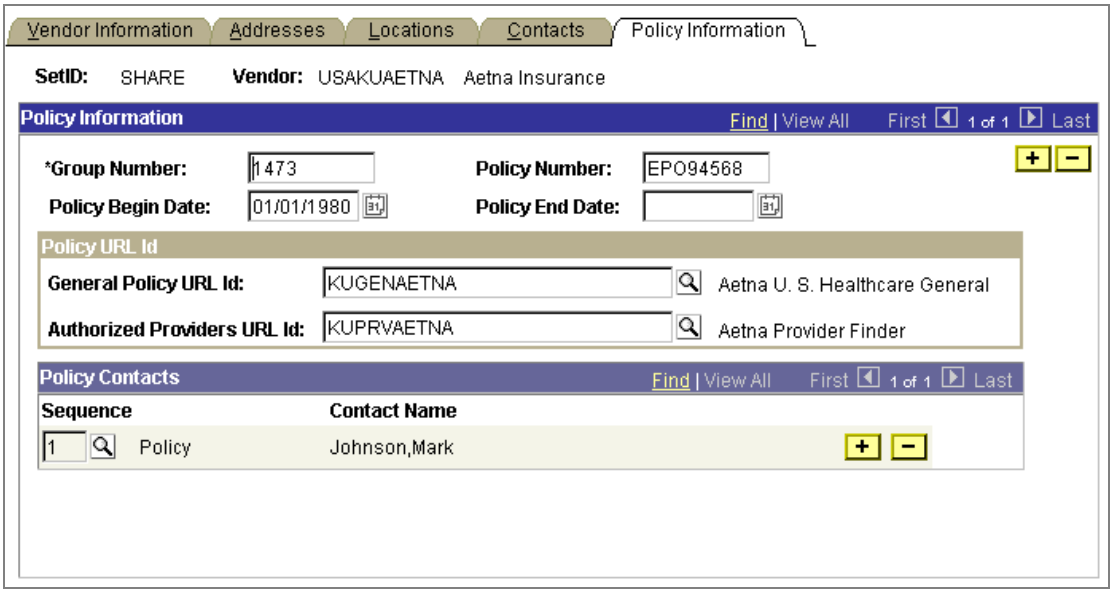
Address — Select one of the addresses that you entered on the Addresses page.

URL — Enter the contact's website address.

Telephone Click this link to display the Provider/Vendor Table - Contacts: Telephone page.

Entering Benefit Policy Information

Access the Provider/Vendor Table - Policy Information page.



Provider/Vendor Table - Policy Information page

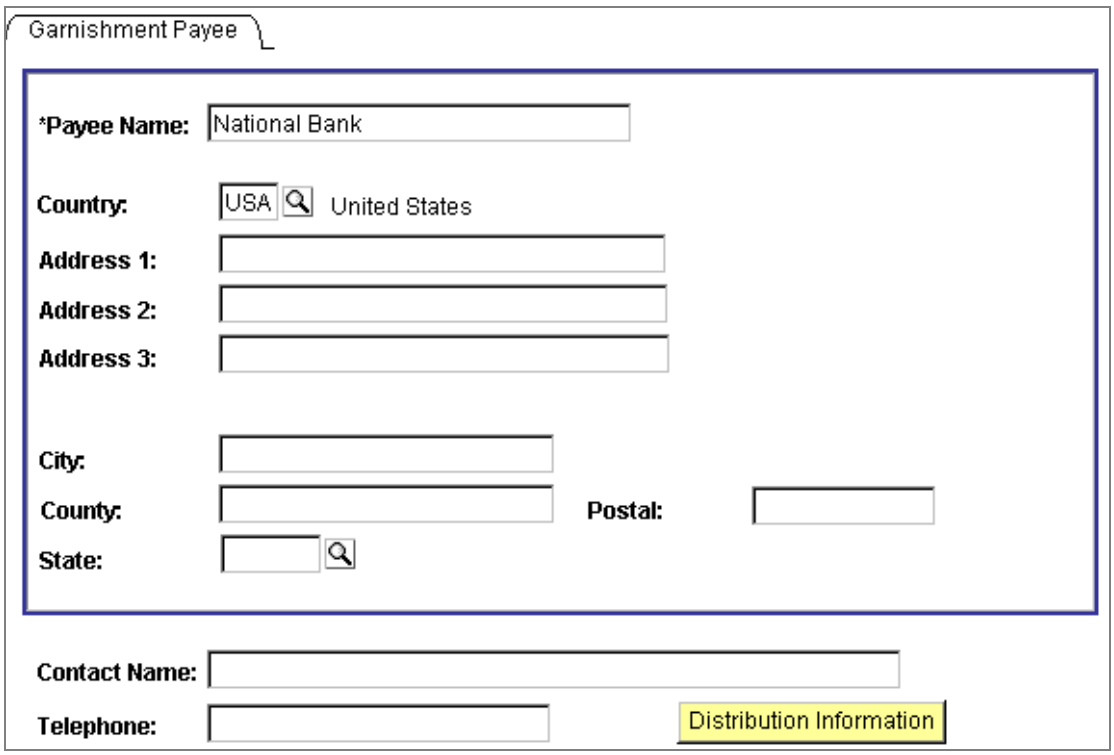
General Policy URL Id Select the vendor's website address that provides general policy information.

Authorized Providers URL Id Select the vendor's website address that contains a list of authorized participating providers

Sequence Select a contact from the list of contacts that were entered on the Provider/Vendor Table - Contacts page. After you select the contact, the **Contact Name** automatically appear.

(USF) Entering Garnishment Payee Contact Information

Access the Garnishment Payee page.

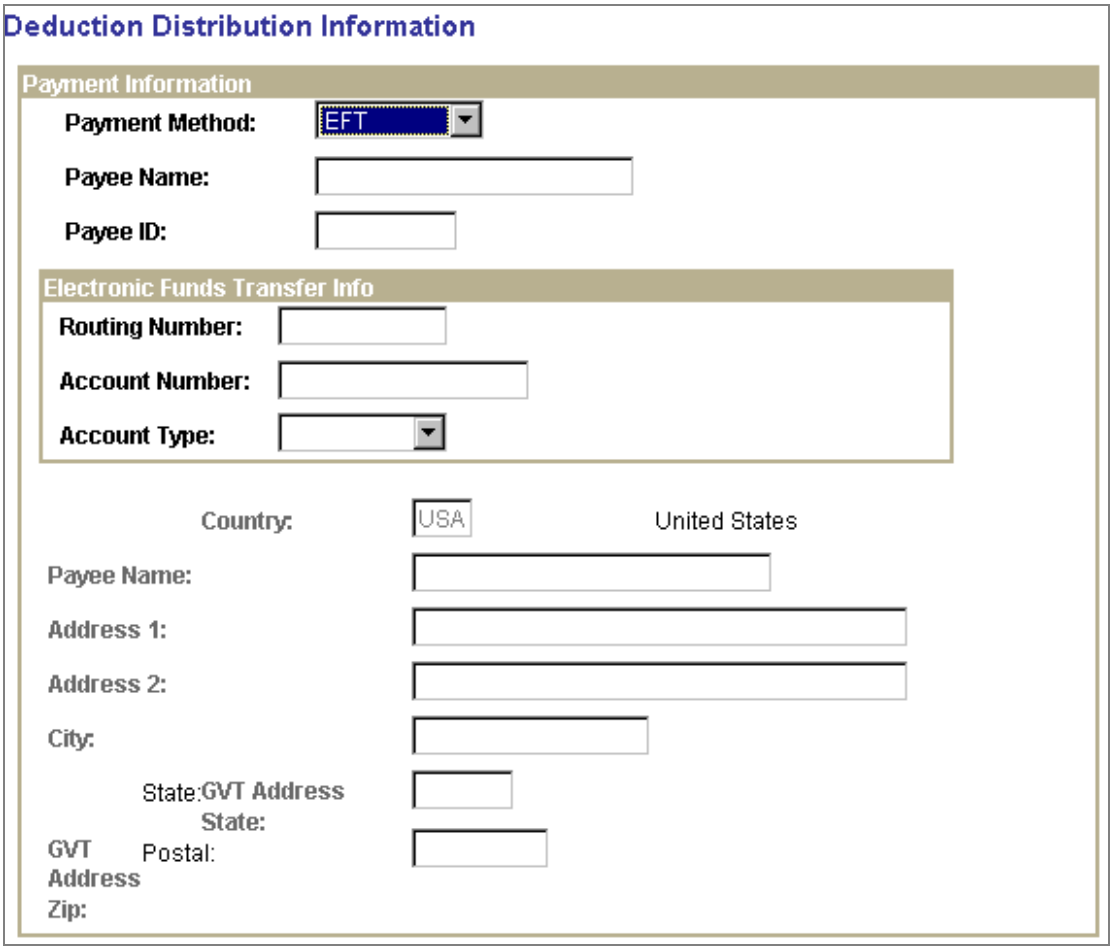


Garnishment Payee Table page

Distribution Information Click this button to access the Deduction Distribution Information page.

(USF) Entering Garnishment Payee Distribution Information

Access the Deduction Distribution Information page.



Deduction Distribution Information page

Note. All fields on this page are identical to those on the Deduction Distribution Information page.

CHAPTER 17

(E&G) Setting Up Service Parameters and Service Accrual Control Tables

This chapter provides an overview and tells you how to:

- Set up service parameters
- Set up service accrual control tables

Understanding Service Parameters and Accrual Control Tables

To determine total accrued service in PeopleSoft for Education and Government, the tenure or flexible service calculation processes the changes, such as date of hire, leave of absence, and maternity leave, in an employee's job status. To determine which time periods count toward service, the system considers the effective date of the job action and checks the rules that you set up in the tenure and flexible service control tables.

Before setting up service rules, you set up methods to handle the time duration between the dates that are used for measuring accrued service. Once you define your duration, date rounding, and date conversion options, you set up the service accrual control tables so that you can use the Tenure Tracking and Flexible Service Tracking features. These features use the elapsed-time method to measure the time periods (duration) between job actions. This method calculates the duration between two raw dates by subtracting one date from another.

A *raw date* is a calendar date; for example, 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 an employee's date of hire and the date that the employee goes on a leave of absence).

Using Service Parameters in Tenure and Flexible Service Tracking

Service parameters are generic across tenure and flexible service calculations. Once you set up a method, you can use it as often as necessary in tenure service and flexible service definitions.

For example, you use these options in defining a flexible service definition for a seniority rule. A seniority service rule might state the following:

- A hire date is effective the first day of the month of hire.

- A leave of absence doesn't count toward service. A 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 human resources (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 rounds the effective date to the first of the month when the date falls before the fifteenth of the month. You apply the two rounding options to the HR action categories, using the Service Rules component. Let's say that an employee is hired on August 3, 1997. The employee begins a leave of absence on October 13, 1997 and returns to work on December 1, 1997. The employee's 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 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.
- 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.

Overview of Setting Up Service Parameters

Following is an overview of the process for setting up service parameters for tracking tenure service (steps 1 and 2) and flexible service (steps 1 through 3).

1. Create a duration option.
2. Create a date round option.
3. *For flexible service only,* set up a conversion option to convert from a decimal year to the format number of years, months, or days.

Understanding Date Math Methods

A date that is 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.

Following is an example (with raw dates formatted as YYYY/MM/DD):

```
  1998/01/01
- 1996/08/01
  0001/05/00, or 1 year, 5 months and 0 days.
```

However, in the following example, consider the 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. However, 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 or an assumed number of days each month.

If you use the actual number of days, the number of days depends on the month in question. In our example, 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. You still have to convert 1 year to months to complete the subtraction, but you know that there are always 12 months in a year. Therefore, you end up with a date of 1997/22/32 and the equation is as follows:

```
  1997/22/32
- 1995/12/15
  0002/10/17, or 2 years, 10 months, and 17 days.
```

If you assume 30 days per month, 1998/11/01 becomes 1998/10/31. After you again convert 1 year to 12 months, you end up with 1997/22/31. The equation is as follows:

```
  1997/22/31
- 1995/12/15
  0002/10/16, or 2 years, 10 months, and 16 days.
```

Setting Decimal to Raw Date Conversion Options

In flexible service, the calculation process converts the total accrued service from a decimal year (with 2 decimal places) to years/months/days format, based on the date conversion option that you select for each flexible service type in the calculation group being processed.

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.

The flexible service calculation process requires conversion from a decimal date (the service amount) to a raw date (number of years, months, and 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 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 discounts the present day, ensuring that 01/01/90 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 that an employee has accrued 5.25 years of service. If you assume 30 days a month and 360 days a year, and you are using 2 decimal places, either conversion method converts this amount to years/months/days format: 05 years, 03 months, and 0 days

Setting Up Service Parameters

To set up service parameters, you need to:

1. Establish duration options.
2. Select a calculation method.
3. Select a conversion method.
4. Define date rounding methods.
5. Set up date rounding rules.
6. Set up a date conversion method.
7. Establish a database alias.
8. Turn on the application trace.

Establishing Duration Options

Duration options instruct the system how to calculate a duration. In tenure and flexible service tracking, the duration option is the method that is 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. The tenure and flexible 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 that you have set up, the system converts the duration to decimals. When you convert raw dates and durations to decimal equivalents, you convert months and days to

partial years. There are several ways to do this depending on the decimal conversion assumptions and the decimal conversion method that you select.

Setting Raw Date Subtraction Parameters

As in our earlier discussion of raw date subtraction, you convert months to days 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 convert the month using either Assumed Days Per Month or Actual Days Per Month.

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 round your dates before calculating the duration.

You round dates by specifying the parameters in the Month Round Rule and Day Round Rule group boxes on the Calculation Option page. For raw date subtraction, the month and day portions of the labels tell you which group box to use. For example, to round days to months, use the Day Round Rule group box.

To round *up* only, select Round Up if Periods > (round up if periods are greater than) 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, select 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 that you select on the 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 way, regardless of which value you're rounding. Select 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. Or select None to avoid rounding.

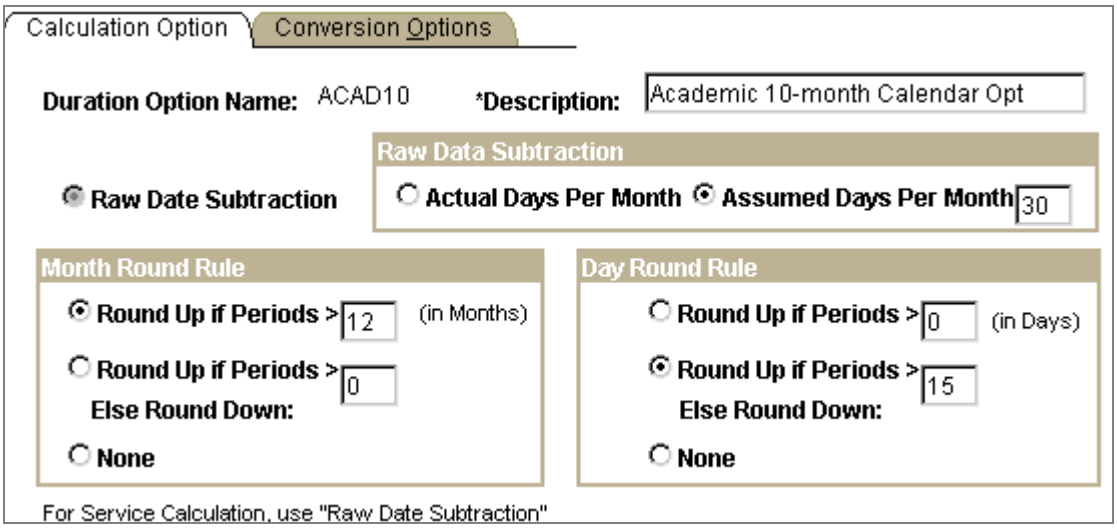
To round the endpoints for the raw date method, use the rounding rules on the Calculation Option page.

Pages Used to Set Up Service Parameters

Page Name	*Object Name*	*Navigation*	*Usage*
Duration Option - Calculation Option	EG_AGECALC_PERIOD	Define Business Rules, Maintain Service Parameters, Rules, Duration Option, Calculation Option	Select a calculation method and set the parameters that are associated with that method.
Duration Option - Conversion Options	EG_AGECALC_PARMS	Define Business Rules, Maintain Service Parameters, Rules, Duration Option, Conversion Options	Select a method for converting raw dates to decimal dates. The flexible service and tenure service processes use the conversion method after performing the subtraction.
Date Round Option	EG_DATE_ROUND	Define Business Rules, Maintain Service Parameters, Rules, Date Round Option, Date Round Option	Set up date rounding rules.
Date Conversion	EG_DATE_CONV	Define Business Rules, Maintain Service Parameters, Rules, Date Conversion Option, Date Conversion	Set up a date conversion method.
Database Alias	EG_ALIAS_ENTRY	Define Business Rules, Maintain Service Parameters, Variables, Database Alias, Database Alias	Set up an event date alias for referencing the Effective Date field on the Job Table.
Application Trace	EG_AUDIT_PNL	Define Business Rules, Maintain Service Parameters, Rules, Application Trace, Application Trace	Turn on the application trace to provide a way to audit an application

Selecting a Calculation Method

Access the Duration Option - Calculation Option page.



Duration Option - Calculation Option page

Raw Date Subtraction This option is selected by default.

Raw Data Subtraction (raw date subtraction)

Actual Days Per Month Select to have the system calculate duration using actual days in each month.

Assumed Days Per Month Select 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.

Note. We recommend that you use Assumed Days Per Month to avoid possible rounding issues.

Month Round Rules

Round Up if Periods > . . . (in Months) Select to round up when the period is greater than the number of months that you specify.

Round Up if Periods > . . . Else Round Down Select to round up when the period is greater than the number of months that you specify and round down when the period is equal to or less than the number of months that you specify.

None Select to avoid rounding.

Day Round Rules

Round Up if Periods > . . . (in Days) Select to round up when the period is greater than the number of days that you specify.

Round Up if Periods > . . . Else Round Down Select to round up when the period is greater than the number of days that you specify and round down when it is equal to or less than the number of days that you specify.

None Select to avoid rounding.

See Also

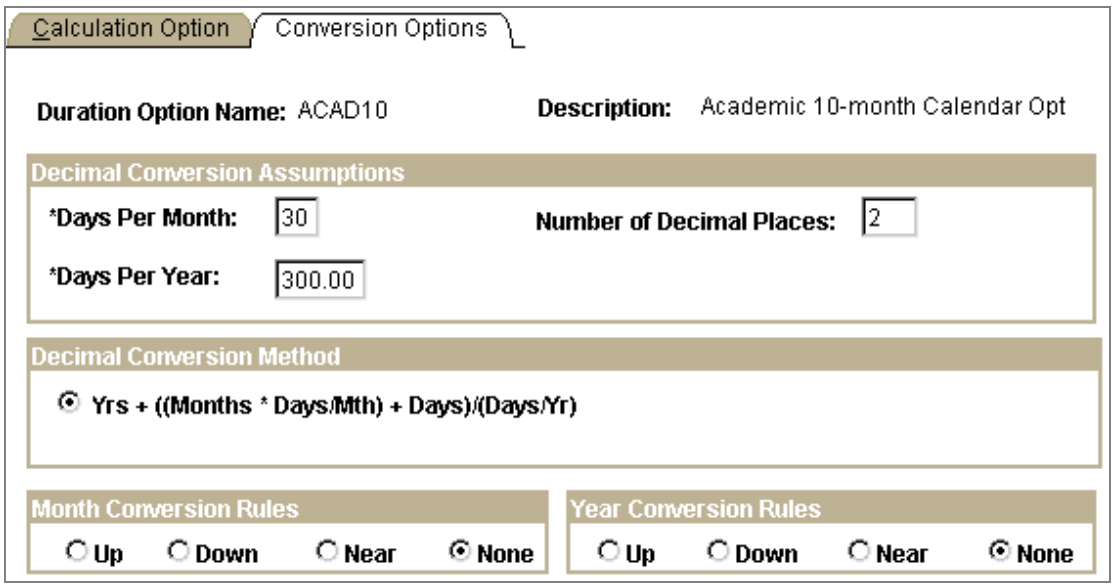
Understanding Date Math Methods

Setting Decimal to Raw Date Conversion Options

Selecting a Conversion Method

Selecting a Conversion Method

Access the Duration Option - Conversion Options page.



Duration Option - Conversion Options page

Decimal Conversion Assumptions

Days Per Month Enter the number of days per month that you want the system to assume in converting raw dates to decimals.

Days Per Year Enter the number of days per year that 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 the number of places that you specify in this field.

Note. The number of decimal spaces that you specify here is used for the internal conversion from raw date to decimal date in the batch calculation process. The final service amount that is calculated for each computational

period in the tenure and flexible service calculation processes is rounded to 2 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

Select **Up, Down, Near,** or **None** as the rule for converting months.

See the page discussion on rounding decimal dates and durations.

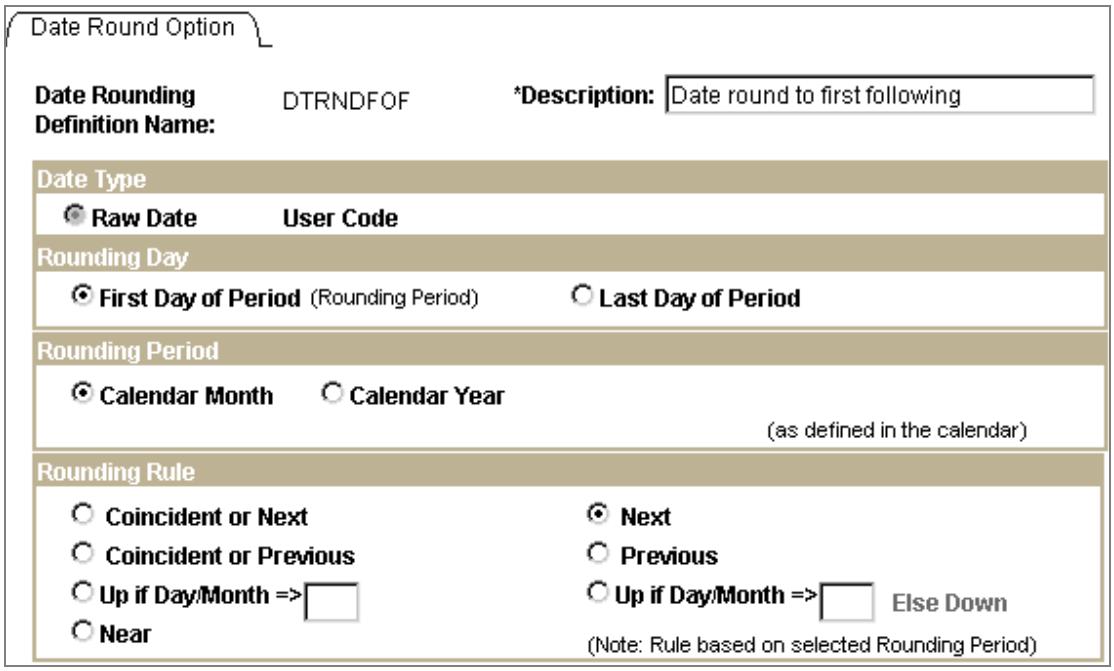
Year Conversion Rules

Select **Up, Down, Near,** or **None** as the rule for converting years.

See the page discussion on rounding decimal dates and durations.

Setting Up Date Rounding Rules

Access the Date Round Option page.



Date Round Option page

Employees accrue 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 that you select.

Because of differences in the rules for different employee groups, you may need to adjust the effective date, depending on the type of job status change. For example, suppose that your organization allows 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 who are hired before the fifteenth.

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, as shown in the following table:

Rounding Day	*Rounding Rule*	*Rounding Period*
First day of	Next	Month
Last day of	Previous	Month

When you round 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 round to the last day of the calendar month, August 3, 1998 becomes August 31, 1998.

However, if you round to the first day of a period, you can round to the Next, the Coincident (with) or Next, the Previous, the Coincident (with) 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 => (up if day or month is equal to or greater than) or Up if Day/Month => . . . Else Down. Both options round up after a threshold number of days (if the rounding period is months) or months (if the rounding period is year). However, the first option doesn't round dates that are below the threshold, whereas the second option rounds down.

The following tables illustrate how each of these options works. In all cases, assume that you are rounding to the first of the month.

Rounding Rule	*Base Date*	*Rounded Date*
Coincident (with) or Next Following	05/01/1995	05/01/1995
Coincident (with) or Next Following	05/02/1995	06/01/1995
Next Following	05/01/1995	06/01/1995
Coincident (with) or First Previous	05/01/1995	05/01/1995
First Previous	05/01/1995	04/01/1995
First Previous	05/02/1995	05/02/1995
Near	05/03/1995	05/01/1995

Threshold Rounding Rule	*Base Date*	*Threshold*	*Rounded Date*
Round Up if . . .	05/17/1995	15	06/01/1995
Round Up if . . . Else Down	05/17/1995	15	06/01/1995
Round Up if . . .	05/17/1995	20	05/17/1995
Round Up if . . . Else Round Down	05/17/1995	20	05/01/1995

Date Type

Raw Date is the default for calculating tenure and flexible service.

Rounding Day

Select whether to round to the **First Day of Period** or **Last Day of Period.**

Rounding Period

Select **Calendar Month** or **Calendar Year.** For example, when managing job history records in tenure service and flexible service calculation, select **Calendar Month.**

Rounding Rule

Note. If you selected **Last Day of Period** in the Rounding Day group box, the **Rounding Rule** group box is unavailable for entry.

Select a rounding rule from the following options:

Coincident or Next

Coincident or Previous

Up if Day/Month =>

Near

Next

Previous

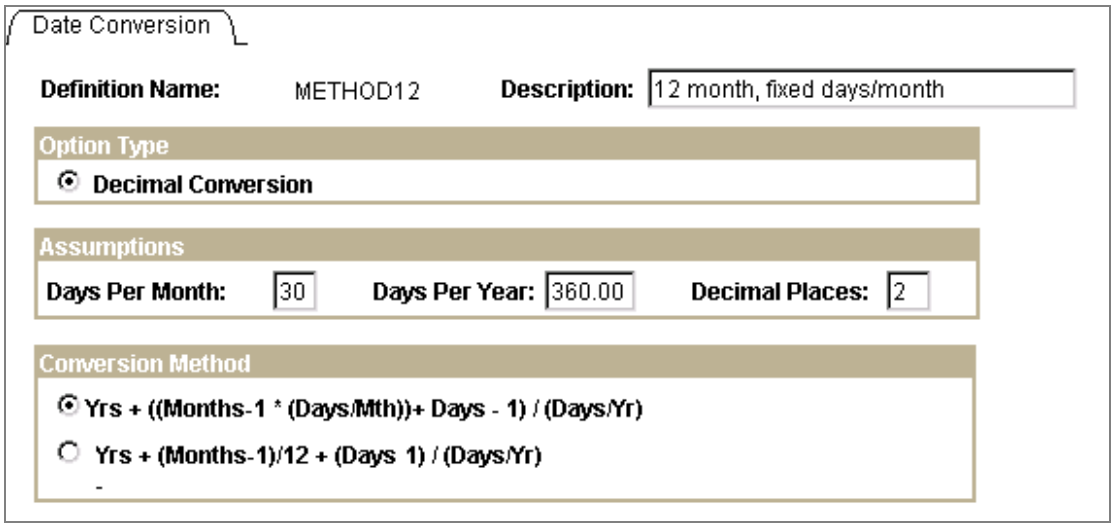
Up if Day/Month => . . . Else Down

See Also

Defining Human Resources Actions and Categories

Setting Up a Date Conversion Method

Access the Date Conversion page.



Date Conversion page

Note. This conversion option is required only for calculating flexible service. It isn't available for tenure.

Option Type

Decimal Conversion is the default.

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

Select one of the two formula methods:

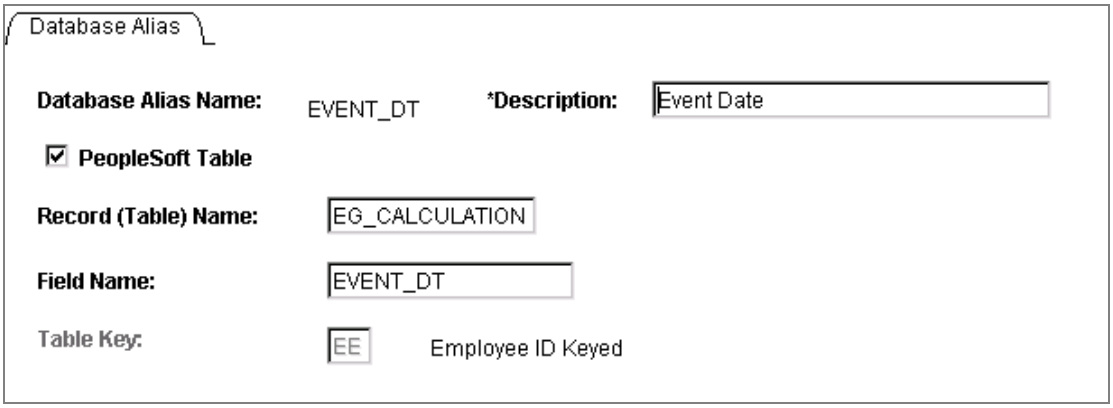
- Yrs + ((Months-1 * (Days/Mth)) + Days - 1) / (Days/Yr)
- Yrs + (Months-1)/12 + (Days - 1) / (Days/Yr)

See Also

Setting Decimal to Raw Date Conversion Options

Setting Up a Database Alias

Access the Database Alias page.



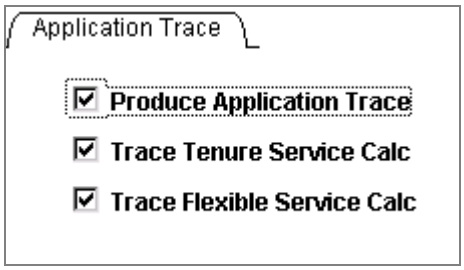
Database Alias page

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	EE

Turning on the Application Trace

Access the Application Trace page.



Application Trace page

Setting the application trace is useful during the implementation phase of the tenure and flexible service calculation process. Don't turn on the trace if you run the calculation on a regular basis. The application trace writes to the Service Audit Table (EG_AUDIT_TRACE), storing the internal calculation details during a calculation run.

Produce Application Trace	Select to turn on the application trace.
Trace Tenure Service Calc (trace tenure service calculations)	Select to trace tenure service calculations.
Trace Flexible Service Calc	Select 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 that you assign to a service type. The system processes service types based on the service rules defined in the definition name. Grouping service rules together under a definition name provides flexibility when you are 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.

To set up service accrual control tables, you need to:

1. Establish service calendars.
2. Define Human Resources actions and categories.
3. Associate a calendar, proration, and date method with a service definition name.
4. Define the Human Resources service categories.
5. Define time adjustments.
6. Define Human Resources status history adjustments.
7. Set up final adjustments to the service amount.
8. Define adjustments that limit the number of hours or service units that can be accrued.
9. Define service calculation groups.

Pages Used to Set Up Service Accrual Control Tables

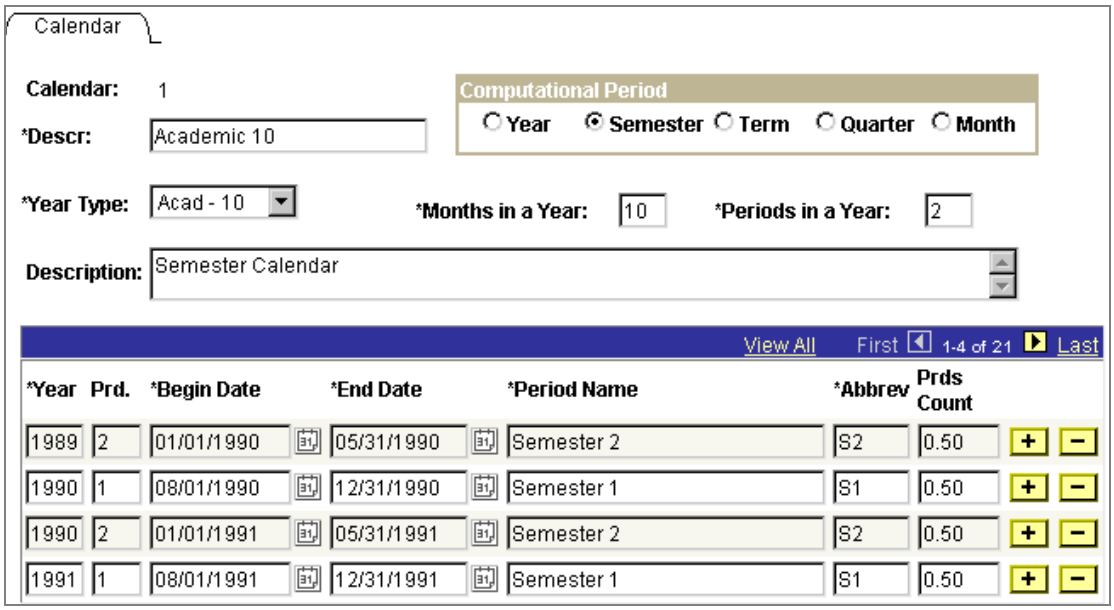
Page Name	*Object Name*	*Navigation*	*Usage*
Calendar	EG_FLXSVC_CALNDR	Administer Workforce, Administer Flexible Service, Setup, Calendar, Calendar Develop Workforce, Manage Faculty Events, Setup, Calendar, Calendar	Establish service calendars for accruing service years.
HR Action/Category - HR Action/Reason	EG_HR_CATEGORY	Administer Workforce, Administer Flexible Service, Setup, HR Action/Category, HR Action/Reason Develop Workforce, Manage Faculty Events, Setup, HR Action/Category, HR Action/Reason	Group similar actions and reasons that count toward service and tenure accrual.

Page Name	Object Name	Navigation	Usage
Service Rules - Service Definition	EG_SVC_DEFINITION	Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Definition Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Definition	Associate a calendar, a proration method, and a date method (for rounding) with the service definition name.
Service Rules - Service Include Category	EG_SVC_STATUS	Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Include Category Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Include Category	Specify which HR service categories are included in the service accrual process in the selected definition name. Specify the date-rounding options for each HR category that is included on this page.
Service Rules - Service Add Periods Rules	EG_SVC_ADD_PERIODS	Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Add Periods Rules Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Add Periods Rules	Define adjustments where the effective date of a status change moves forward. Select the employee records that are affected by the parameters that you set throughout the Service Rules component.
Service Rules - Service Adj Future (service rules - service adjust future)	EG_SVC_ADJ	Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Adj Future Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Adj Future	Define HR status history adjustments that depend on future changes in status.

Page Name	*Object Name*	*Navigation*	*Usage*
Service Rules - Service Final Handling	EG_SVC_FINAL_RND	Administer Workforce, Administer Flexible Service, Setup, Service Rules, Service Final Handling Develop Workforce, Manage Faculty Events, Setup, Service Rules, Service Final Handling	Set up final adjustments to the service amount.
Service Rules - Min/Max Service Rules (service rules - minimum and maximum service rules)	EG_SVC_MIN_MAX_SVC	Administer Workforce, Administer Flexible Service, Setup, Service Rules, Min/Max Service Rules Develop Workforce, Manage Faculty Events, Setup, Service Rules, Min/Max Service Rules	Define adjustments that limit the number of hours or service units that can be accrued within a specific period of time.
Calculation Group	EG_CALC_GRP_DFN1	Administer Workforce, Administer Flexible Service, Setup, Calculation Group, Calculation Group Develop Workforce, Manage Faculty Events, Setup, Calculation Group, Calculation Group	Create calculation groups to group employees who have the same calculation rules applied to their service accrual process.

Establishing a Service Calendar

Access the Calendar page.



Calendar page

Set the number of months and periods in a service year, as well as the start and end dates for each period in the year.

The period start and end dates are crucial to 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 10 months (August 1 to May 31). The year has 2 periods; each period spans 5 months. Service is accrued based on each 5-month period.
- A fiscal year of 12 months (July 1 to June 30). The year has 1 period spanning the full 12 months. A fiscal year calendar might be used to accrue service credits for seniority.

When you create a new calendar, enter information into 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 batch processes that track flexible service and tenure service don't accrue service credits for dates that are 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.

Computational Period Select **Year, Semester, Term, Quarter,** or **Month** as the time frame for accruing flexible service or tenure.

Year Type Select a year type on which to base calculations. Then specify the number of months and periods in a year for this year type; for example, an academic year of ***10*** months divided into ***4*** periods (quarters).

Your system is delivered with year types ***Acad-10*** and ***Fiscal-12.*** You can make additional entries on the Translate Table.

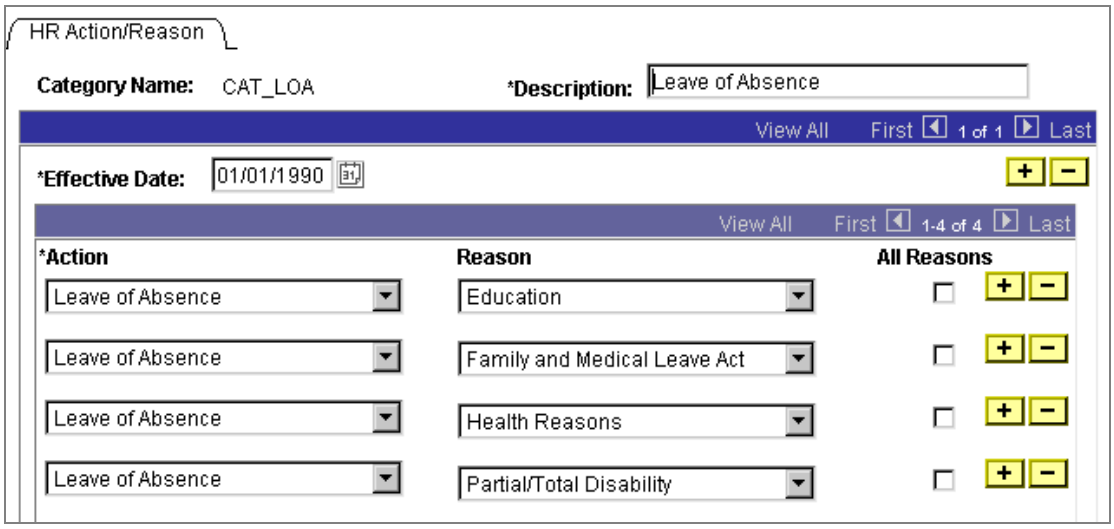
Months in a Year	Enter the number of months in the calendar year that you are defining.
Periods in a Year	Enter the number of periods in the calendar year.
Year	Enter the calendar year that is covered by the defined calendar. For example, if the academic year 1998 comprises two semesters, one starting in September 1997 and the other in January 1998, 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 and **End Date**	Enter the period's start and end dates.

Important! When you enter start and end dates on the employee's Service History page and on the Tenure Calculation or Flexible Service Calculation run control pages, make sure that the dates on the pages match the dates in the **Begin Date** and **End Date** fields. Otherwise the process won't run. You might have to define calendars solely for the purpose 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 Count (periods count)	Using a decimal value of up to 2 decimal places, indicate how much the period counts toward the entire year (for example, for four periods, each period can count as 0.25 of the total year). This value is used to calculate how much credit an employee receives for working the period.

Defining Human Resources Actions and Categories

Access the HR Action/Category - HR Action/Reason page.



HR Action/Category - HR Action/Reason page

The job action/reason codes that are identified in the HR categories are processed against the employee's job records during the accrual process.

Defining HR actions/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. By grouping the categories on this page, you eliminate the need to identify them individually on the Service Include Category page.

HR action and category processing rules may differ among faculty or employee groups, requiring you to set up multiple HR categories. For example, one HR category might include the job actions Hire, Terminate, and Leave, as well as six or seven reasons that make each action eligible to count for service credits. Another HR category might include the job actions 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 reference job action/reason codes only through HR categories. Even if a category consists of a single action or action/reason combination, you must include the job action/reason in an HR category to reference that code in the flexible service rules.

Category Name Displays the service category name that 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 are ***CAT_LOA*** (category leave of absence) and ***CAT_HIR*** (category hire).

Action Select the job action that should accrue toward service in this HR category. To include more than one action for this category, click the **Insert Row** toolbar button to add rows.

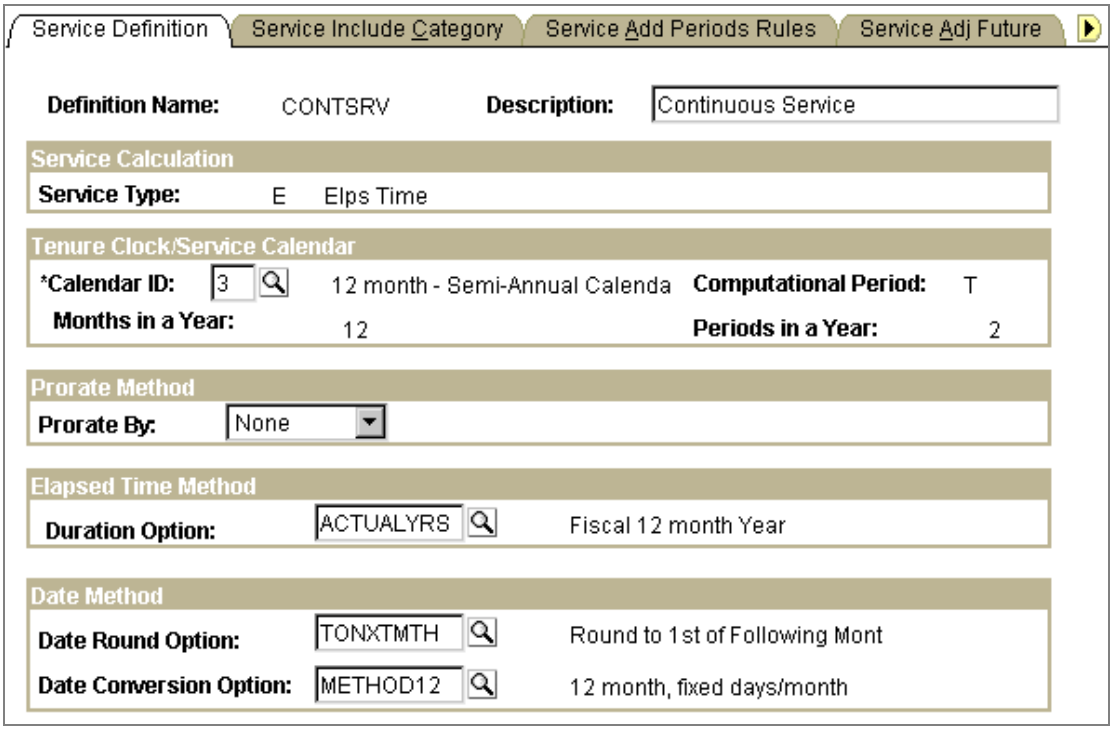
Reason	To include reason codes for a job action and make it eligible to accrue service credits, select a reason. You can specify more than one reason for an action by adding a row and selecting the same action and a different reason.
All Reasons	Select to specify that all reason codes for a job action are eligible to accrue service credits. You don't need to add a row for each reason.

See Also

Associating a Calendar, Proration, and Date Method With a Service Definition Name

Associating a Calendar, Proration, and Date Method With a Service Definition Name

Access the Service Rules - Service Definition page.



Service Rules - Service Definition page

Service rules become part of the definition name that you assign to a service type. The system processes service types based on the service rules that are defined in the definition name. Grouping service rules under a definition name provides flexibility when you are determining calculation rules for different types of service accrual processing.

Definition Name Displays the 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 method used to calculate accrued service. By default, the system uses ***Elps Time*** (elapsed time). This method measures the time duration between two dates, taking into account the HR Action/Category event changes on the employee's job history.

See Also

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 that is based on the academic year using the computational period of a semester (10 months in a year and 2 periods in a year).

Months in a Year Based on the **Calendar ID** field, 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** field, the system displays the period of time on which the service calculation is based; for example, ***S*** (semester). This field is populated from the selected calendar, which is maintained on the Calendar page.

Periods in a Year Based on the **Calendar ID** field, the system displays the number of periods per year for the selected calendar.

Prorate Method

Prorate By Select a prorate method of ***None*** or ***FTE*** (full-time equivalency), depending on the type of service being tracked

Pro-rate if below Enter the percentage of FTE (for example, ***80***) below which you want the system to prorate accrued service. The system calculates any FTE value that is equal to or greater than this value as 1.0, for the purpose of proration. This field isn't visible if you selected ***None*** in the **Prorate By** field; the system calculates all FTE values as 1.0.

Elapsed Time Method

Duration Option Select a duration from the list of options. You can set up different ways to calculate elapsed time using the Duration Option pages.

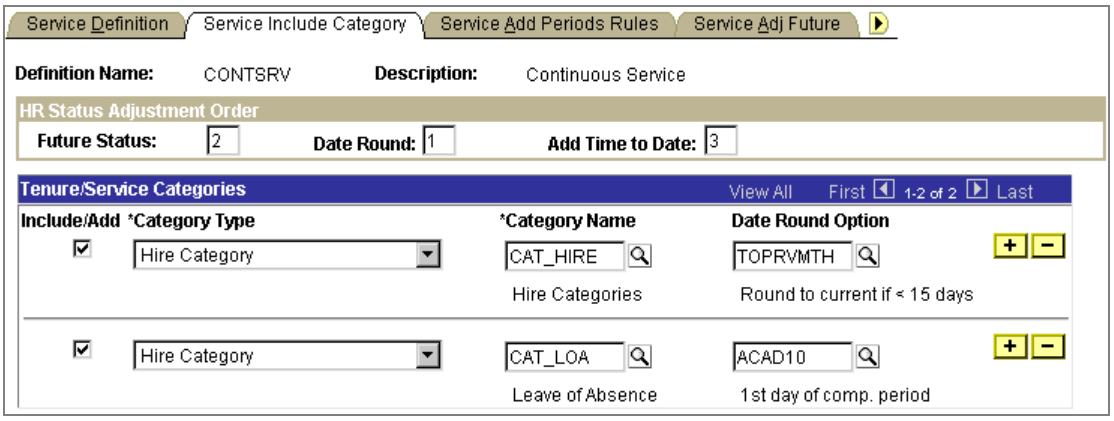
Date Method

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 options. Date conversion methods are established and maintained on the Date Conversion Options page. This field applies only to the flexible service tracking. It doesn't apply to tenure tracking.

Defining the Human Resources Service Categories

Access the Service Rules - Service Include Category page.



Service Rules - Service Include Category page

Employees accrue service credits based on the action/reason codes in their job history. HR actions/categories are defined on the HR Action/Category page and comprise one or more job action/reason codes. The action/reason codes defined in the HR category determine whether an employee accrues credits for each job action/reason.

HR Status Adjustment Order

Because you can make multiple adjustments to status, and each change has the same date, you must tell the batch calculation process in what sequence to apply these adjustments. Using this group box, indicate the order (from ***1*** to ***3***) in which the adjustments are to be made.

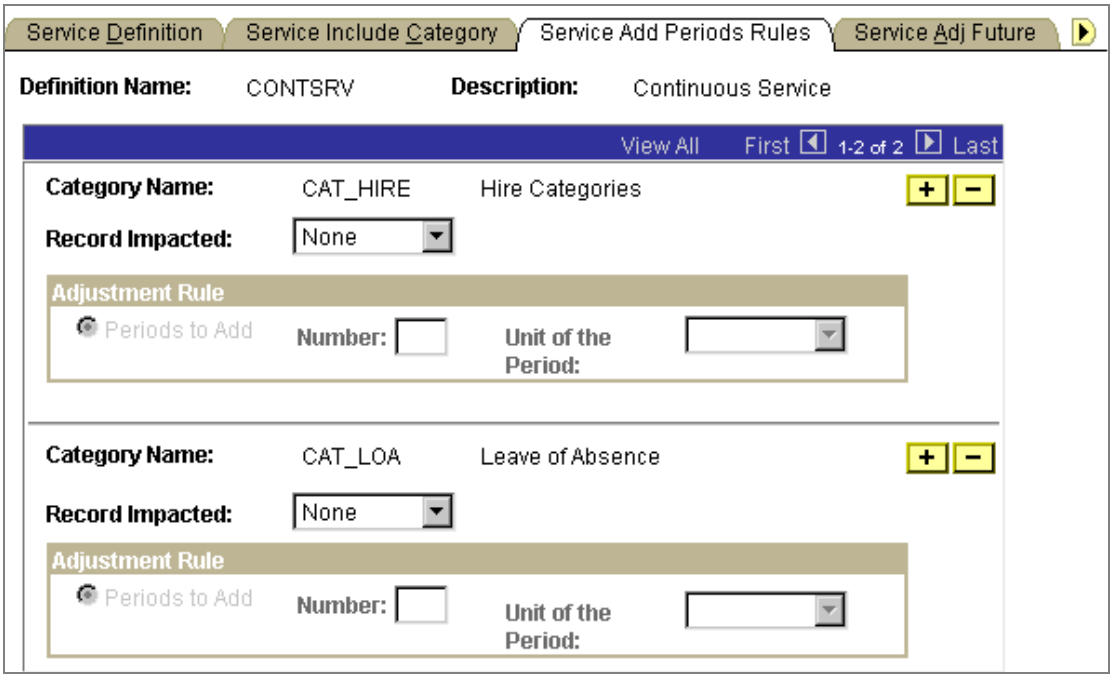
Future Status	Refers to the status entered on the Service Adj Future page.
Date Round	Refers to the date round options set on this page.
Add Time to Date	Refers to the adjustment entered on the Service Add Periods Rules page.

Tenure/Service Categories

Include/Add	Select to have the service category in the **Category Name** field count toward service accrual. For example, select this check box if you want ***Leave of Absence*** to count toward service accrual.
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*** (category leave of absence). An HR category comprises one or more job action/reason codes. You establish HR categories and their component HR Action/Category groups on the HR Action/Category page. For example, if you select the category ***CAT_HIR*** (category hire), 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 option that is 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 in the month that the employee was hired. These options are maintained on the Date Round Option page.

Defining Time Adjustments

Access the Service Rules - Service Add Periods Rules page.



Service Rules - Service Add Periods Rules page

Sometimes you may want to delay the effective date of an Action/Reason event. For example, if an employee can continue to accrue service for the first month of a leave, you adjust the effective date of any leave action by adding a month. Do this by adding a time period to the Action/Reason effective date.

Category Name — The **Category Name** refers to the HR service category, such as ***CAT_HIR*** (category hire) that is specified on the Service Include Category page. To set up adjustment rules for more than one **Category Name,** add new rows. If you entered more than one category name, use the scroll bar to add information for each category.

Record Impacted — 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 grant a 30-day leave of absence adjustment for only the first leave and do not adjust any subsequent leaves.

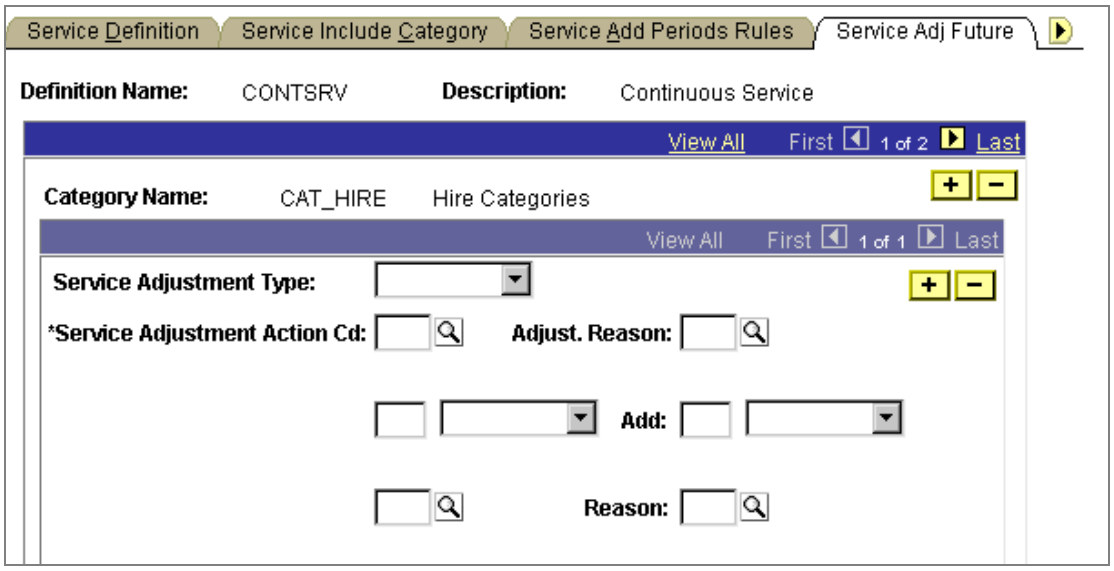
Adjustment Rule

In this group box, specify how the system applies the time adjustment that 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 can grant the 30-day leave of absence adjustment only for the first leave and not adjust any subsequent leaves.

Periods to Add	Select to add time to an effective date. This check box might be unavailable for entry, depending on your selection in the **Record Impacted** field.
Number	Enter the number of periods to add to the accrued service.
Unit of the Period	Select the unit for the periods you are adding. For instance, if you select ***Days*** in this field and enter ***2*** in the **Number** field, the system adds 2 days to the effective date of the selected category.

Defining Human Resources Status History Adjustments

Access the Service Rules - Service Adj Future page.



Service Rules - Service Adj Future page

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 return to work later. On this page, you can adjust the current event based on a future event or adjust a future event based on a second future event.

Adding Time to the Effective Date of a Status Change

By adding a time period, you can delay an effective date based on other events that occur later within defined periods of time.

For example, you can adjust the effective date of a leave of absence by 1 month (that is, to grant 1 month of extra service) only if the employee returns within 4 months. To do this, select ***A*** (add) in the Service Adjustment Type field and ***RFL*** (return from leave) in the Service Adjustment Action Cd (service adjustment action code) field. In the Occurs Within fields, enter ***4*** and ***M*** (months); in the Add fields, enter ***1*** and ***M***.

Ignoring the Current Status Change

By selecting ***C*** (ignore current action/reason) in the Service Adjustment Type field, you can ignore the original HR status change based on other events that occur later within defined periods of time.

When you select this adjustment, select the event in the Service Adjustment Action Cd field. In the Occurs Within fields, indicate how far in the future to look for this event.

For example, you can ignore a leave of absence if the employee returns within one month. To do this, select ***C*** in the Service Adjustment Type field and ***RFL*** in the Service Adjustment Action Cd field. In the Occurs Within fields, select ***1*** and ***M.***

This adjustment has 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 15-day leave is ignored. Because it was less than 1 month, the system doesn't consider it a break in service.

Using the inside scroll bar, you can enter as many service adjustments as necessary for each category.

Service Adjustment Type — Select from the list of options.

Some of the fields that appear below this field vary, depending on the value that you select here. Select ***A*** (add), ***C*** (ignore current action/reason), ***F*** (ignore future action/reason), or ***I*** (insert).

Service Adjustment Action Cd (service adjustment action code) — Select the type of service adjustment action, such as ***HIR*** (hire).

Adjust. Reason (adjustment reason) — Select the reason for the adjustment, such as ***LTDP*** (long term disability with pay).

Occurs Within — Select the time frame in which the adjustment occurs, such as ***D*** (days). This field appears when you select ***A, C,*** or ***F*** in the **Service Adjustment Type** field.

Does Not Occur Within — Select the time frame in which the adjustment does not occur, such as ***D.*** This field appears when you select ***I*** in the **Service Adjustment Type** field.

Add — Select a time period to add to the service adjustment. This field appears when you select ***A*** in the **Service Adjustment Type** field.

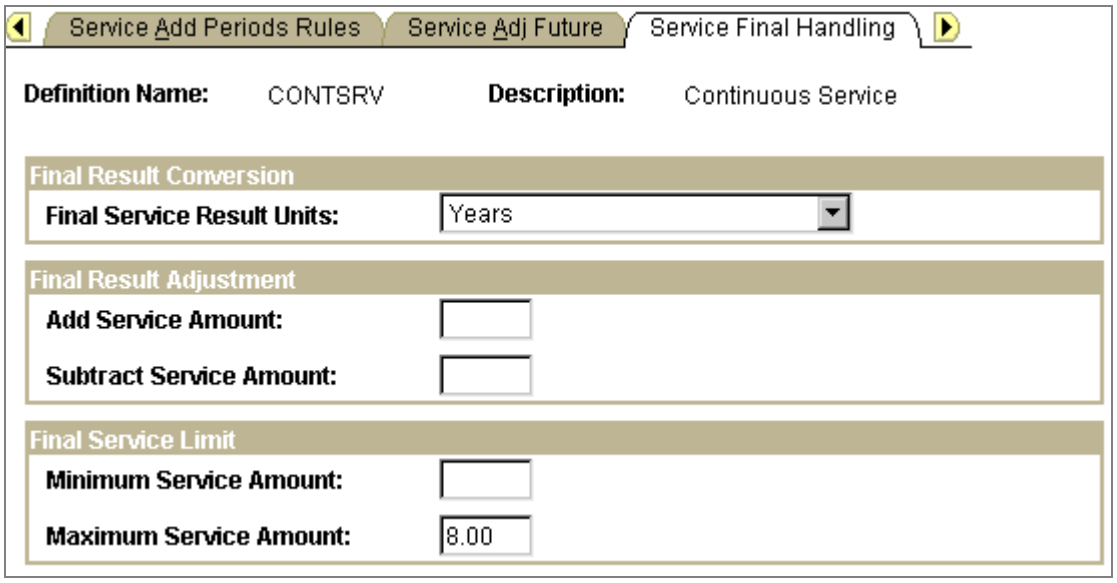
Ignore Future Select the type of service adjustment action that is to be ignored in the future. This field appears when you select ***F*** in the **Service Adjustment Type** field.

Insert Select the type of service adjustment action that is to be inserted. This field appears when you select ***I*** in the **Service Adjustment Type** field.

Reason Select the action/reason code that is defined in the HR category. This field appears when you select ***I*** or ***F*** in the **Service Adjustment Type** field.

Setting Up a Final Adjustment to the Service Amount

Access the Service Rules - Service Final Handling page.



Service Rules - Service Final Handling page

The adjustment or service limit on this page applies to the total service amount for the employee. For example, the maximum service cap for a service type is 8 years. Once you enter ***8*** in the Maximum Service Amount field, the calculation process doesn't accrue more than 8 years of service for the employee.

Final Result Conversion

Final Service Result Units Select the calendar unit, such as ***Y*** (years), that is to be used in the final conversion. ***Y*** is the only value that is available for Flexible Service Tracking and Manage Faculty Events.

Final Result Adjustment

Add Service Amount Enter the amount, in years, that is to be added to the total accrued service.

Subtract Service Amount Enter the amount, in years, that is to be subtracted from the total accrued service.

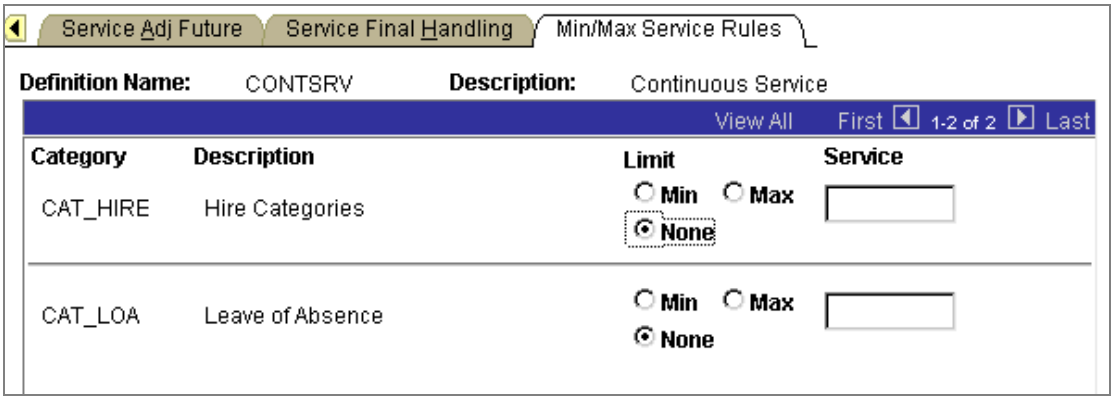
Final Service Limit

Minimum Service Amount Enter the minimum amount of service that is required for credit for the selected category.

Maximum Service Amount Enter the maximum amount of service that is permitted for the selected category.

Defining Adjustments That Limit Accrual of Hours or Service Units

Access the Service Rules - Min/Max Service Rules page.



Service Rules - Min/Max Service Rules page

These rules apply to a Human Resources action/category that is based on a calendar period.

Use the scroll bar to display more categories and rules. To add a new row, click the **Insert Row** toolbar button.

Category The system displays the service category, such as ***CAT_HIR*** (category hire), which is defined on the Service Include Category page.

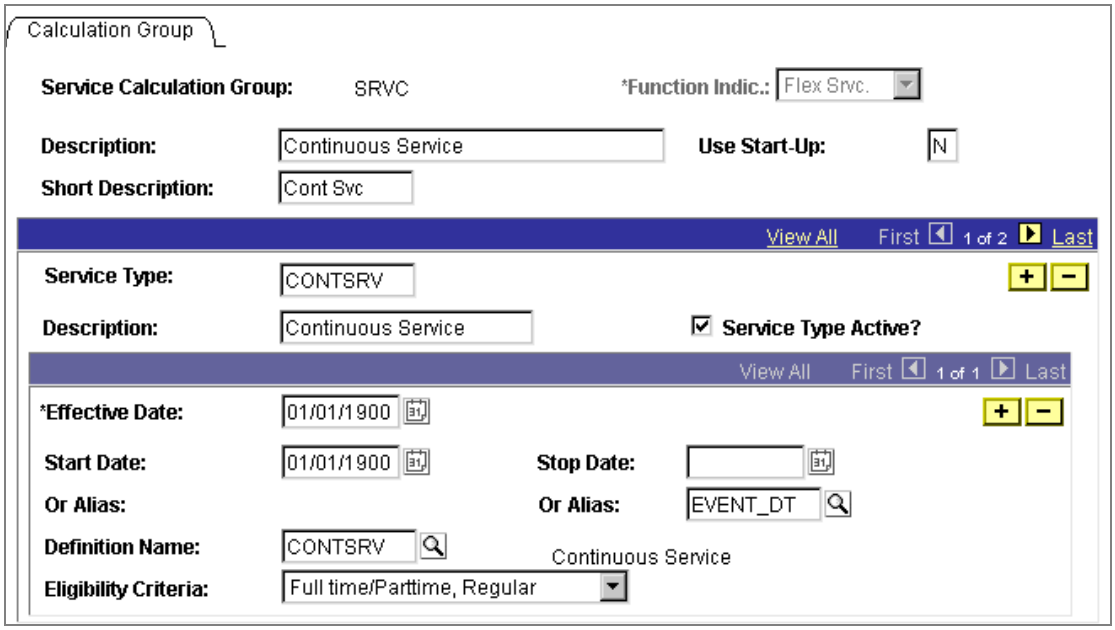
Category Description The system displays service category descriptions (such as ***Hire Categories***), which are maintained on the Service Include Category page.

Limit Select **Min** or **Max** to specify a minimum or maximum service limit for each category that is listed. Select **None** for no limit.

Service Enter the minimum or maximum amount of service for the selected category. This field is required if you selected **Min** or **Max** in the **Limit** field.

Defining Service Calculation Groups

Access the Calculation Group page.



Calculation Group page

The calculation group provides a way to group employees who have the same calculation rules applied to their service accrual process. The calculation group can be associated with one or more service types.

By indicating that start-up credits apply to the calculation group, you tell the service accrual process to include the start-up credits that you entered on the employee's Service History page.

Service credit is accrued against each service type. The service types are linked to a Definition Name. The Definition Name 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, HR Categories, and Date Rounding options).

The calculation group also identifies which employee types are eligible to accrue service credits in each service type. For example, a 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. You define the employee eligibility criteria for each service type in a calculation group.

For 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 that you define are associated with the employees in your organization who are eligible to accrue flexible service. The calculation group becomes part of the employee's employment record.

Service Calculation Group — Displays the name that 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 6 characters.

Function Indic. (function indicator) — Select the function, or process, for which this calculation group will be used. Options are ***Flex Srvc*** (flexible service) and ***Tenure.***

Use Start-Up — Enter ***Y*** (yes) to include startup credits to the employee's accrued service. Startup credit is maintained on the Service Detail page for the employee.

Enter ***N*** (no) to *not* include prior service credits in the calculations.

Service Type — Enter the service type 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 system-generated number provides a unique key to the service type when more than one service type exists in a calculation group. This value is used by the service accrual batch process.

Service Type Active? — Select to activate a service type for the current calculation group.

If you clear the check box for a service type, that service type isn't included in the service accrual process.

Start Date — Enter a valid calendar date as the start date for this calculation group. The start date determines when the change is added to the system.

Or Alias — Use a valid calendar date, not an alias, as the start date.

Stop Date — Enter a stop date in this field or select an alias in the Alias field. You must do one or the other.

Or Alias — If you did not enter a stop date in the Stop Date field, select an alias in this field.

Or Alias is a critical field. Select the alias ***EVENT_DT*** (event date), which links to the job history in the calculation process. The ***EVENT_DT*** alias is maintained on the Database Alias page. In the case of a service calculation, the through date is used as the ***EVENT_DT.***

Definition Name

Once you enter a service type for this calculation group, you must indicate the service rules definition name that 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 provides the following information to the system:

Which calendar to use.

Which date rounding and proration methods to use.

What service categories (action/category code groupings) are eligible for inclusion in the service calculation process.

Eligibility Criteria

Select the criteria that determine which employees (assigned to this calculation group) are included in the service accrual process. For example, you can specify that only full-time employees be included.

This field applies to flexible service tracking only.

See Also

Setting Up a Database Alias

CHAPTER 18

(USF) Setting Up the Work-in-Progress Management System

This chapter provides an overview of the Work-in-Progress (WIP) management system and tells you how to:

- Set up the WIP management system.
- Manage the WIP system.
- Define the WIP activity processes.
- Use the sample data that is delivered with PeopleSoft Human Resources

Understanding the WIP Management System

In PeopleSoft Human Resources, you can track and process personnel data using a work-in-progress (WIP) management system. PeopleSoft Human Resources is delivered with a WIP management system that is already set up for controlling your personnel and recruiting data. The system is ready for configuration. You set up this system only once.

Setting Up the WIP Management System

As part of setting up your WIP system, you perform the following tasks:

- Set up records to define each status type and determine how the system handles it.
- Decide which process works best for your agency and set parameters to automate your Personnel Action Request (PAR) and recruiting processes.
- Define the users who have access to your WIP data.
- Plan a routing and approval process that is synchronous with your agency's requirements.

Before You Begin

Setting up WIP control parameters is usually a one-time-only process that you do when you first configure your PeopleSoft Human Resources system. The setup information in this

chapter is for your agency's system administrator who will perform the setup and is not for managers or system users.

All discussions assume that you understand the processes that are being described. A sample WIP setup exists for the Personal Action Request (PAR) and recruiting in the demonstration database that was delivered with your system.

Before you start setting up your WIP system, we recommend that you review the sections cited below under "See Also."

See Also

USF Administering Personnel Action Requests

USF Processing Personnel Action Requests

Setting Up Your Manage Competencies Business Process

Managing Your WIP System

You can configure your WIP controls by setting up records that define the WIP status codes that you want to use. The WIP status code tells PeopleSoft Workflow when and where to send data to the next step of the request/approval cycle or other type of cycle. You associate various status types with each code. The status type tracks the requests.

This section describes how to set up records for administering and recruiting your workforce. You use two components, WIP Table Records and WIP Activity Records, to set up WIP parameters.

Defining WIP Status Codes and Status Types

When you define WIP status codes, you classify the WIP processes into steps. You use those steps to define routing and tracking in PeopleSoft Workflow.

When reviewers change the WIP Status of a request, the PeopleSoft Workflow process that you link to a status ensures that the action goes through all of your agency's review levels and keeps it going until it is completed as an actual event.

Designing Your Agency's WIP Process

First, review the charts for processing PARs as a sample for one of the WIP setups.

Next, analyze your agency's review process and determine the levels of review that you need for PARs and recruiting processes.

You can design your system based on your agency's requirements for routing requests and other data through approval processes.

In the section "Overview - Sample System Parameters," review the charts, which show the sample system's parameters. You can use these charts as is, change them, or use them as templates to set up your own charts in similar formats.

Defining WIP Status Codes

When you set up your WIP management system, you select and configure the types of status codes that your agency needs. You can use all or some of the statuses that are delivered with the system; you can use some of them more than once in a process. For example, your agency might require two levels of authorization and two levels of approval for processing a PAR. Or, as shown in the sample system, you might want two levels of authorization and one level of approval. The sample system assigns the following status codes:

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 (individual retirement record reported)	IRR

Defining WIP Status Types

When you're ready to choose your WIP statuses, you link each WIP status that you've defined to a WIP status type. Status types are:

WIP Status Type	*Definition*
Work-in-progress	The request hasn't reached the final level of approval.
Canceled	A completed request is canceled by HR.

WIP Status Type	*Definition*
Corrected	A completed request is corrected by HR.
Completed	A request that has successfully completed all review levels is approved by HR.
IRR Reported	The request will be reported on an IRR.

Linking WIP Status Codes and Status Types

To link status codes and status types:

1. Define your WIP status codes according to the plan you've set up for your agency.

   For example, for a PAR, you might have two first-level authorization reviews, one second-level approval review, and a final human resources (HR) review. You define those review levels in the WIP record tables.

2. Link a *Work-in-progress* status type to each PAR.

   When a PAR is traveling along a path of approvals, you link the status type *Work-in-progress* to the PAR until it is completed and approved.

3. Change the status type to *Completed* after the request has passed all reviews and has been approved by HR.

   Only when you define a WIP status as *PRO (Processed by HR)* do you link the status type to *Completed*.

Note. After a PAR has been processed, it might need to be corrected or canceled; only HR can correct or cancel a completed PAR. For the WIP status *Corrected* or *Canceled*, link to the status type *Corrected* or *Canceled.*

Note. Only HR can create supplemental or corrected IRRs (individual retirement records). For PARs with the WIP status *IRR Reported,* link to the status type *IRR Reported.*

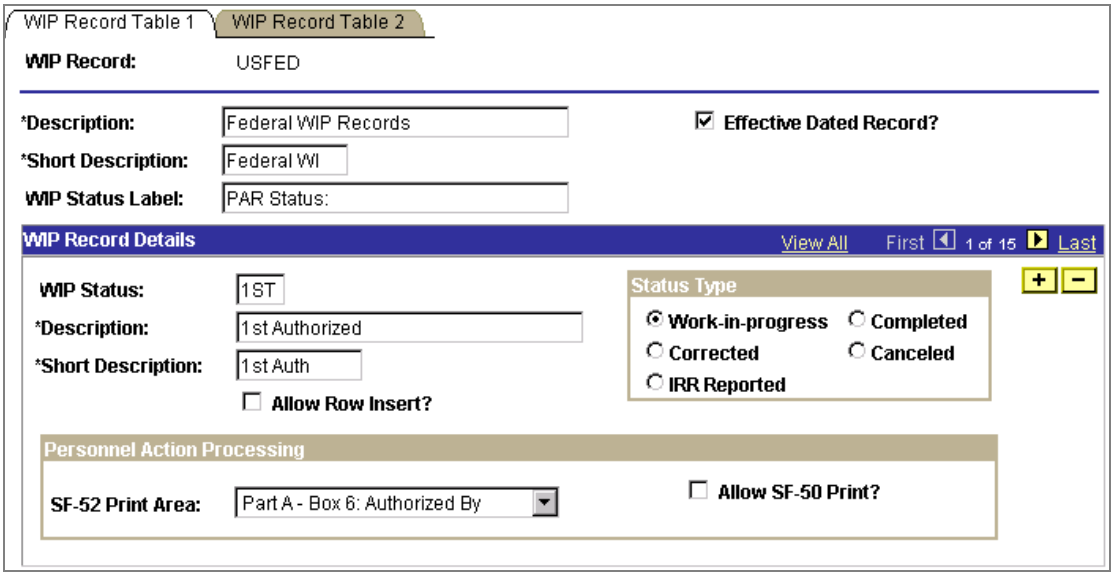
Now that you understand the WIP Status and the Status Type, have analyzed the request process, and have determined the process that your agency will use, you're ready to define your WIP statuses and link each one to a status type.

Pages Used to Define and Link WIP Status

Page Name	*Object Name*	*Navigation*	*Usage*
WIP Record Table - WIP Record Table 1	GVT_WIP_RECORD1	Define Business Rules, Define WIP Parameters (USF), Setup, WIP Record Table, WIP Record Table 1	Define WIP statuses: Describe the type of records you're setting up, describe each status that you want to use, and link each status to a WIP status type.
WIP Record Table - WIP Record Table 2	GVT_WIP_RECORD2	Define Business Rules, Define WIP Parameters (USF), Setup, WIP Record Table, WIP Record Table 2	Identify the programs and define the data that is needed to support this WIP process.

Defining WIP Statuses

Access the WIP Record Table - WIP Record Table 1 page.



WIP Record Table - WIP Record Table 1 page

Because the WIP setup is delivered with your system, we describe the page controls that appear on this page as they apply to our sample database. You can change the values to correspond to the setup that you require for your agency.

The WIP record is the record for which you are setting up these parameters. The USFED (US Federal) record that is delivered with this system includes the Employee Data and Recruitment records that refer to Gvt_Pers_Data (government personal data), Gvt_Job, Gvt_Employment, and others as one record. This value shows the records that you specified when you opened the WIP Record Table 1 page.

On this page, describe the type of records you're setting up, describe each WIP status that you want to use, and link each status to a WIP status type.

WIP Status Label — Enter a WIP status label. This label is for referencing the WIP status on various human resources pages. For example, for referencing the WIP status on the Administer Workforce request pages, the label in our sample system is ***PAR Status*** (personnel action request status).

Effective Dated Record? — Select if the record is to be effective-dated; for example, ***USFED*** (US Federal).

WIP Record Details

WIP Status (work-in-progress status) — Enter the step in the process; for example, ***1st*** (first review, first level).

Status Type

Select the status type to be linked to the status that you defined in the **Description** field.

Work-in-progress — Request hasn't reached the final level of approval.

Corrected — Cancels a completed action.

IRR Reported (individual retirement record reported) — HR Corrects a completed request.

Completed — HR approves a request that has successfully completed all review levels.

Canceled — The request will be reported on an IRR.

For the WIP status codes and status types for which you selected *Allow Row Insert From Status* on some pages in PeopleSoft Human Resources, the system creates a history of the changes that you can see on the pages. For example, on the Administer Workforce request pages, the user can enter a new effective-dated row on the Data Control page.

These types of pages are part of the WIP processing pages and depend on the WIP control configuration to designate the WIP status in which a user can enter a new row. Therefore, you define the WIP status and status types that enable a user to enter a new row for various pages in the system.

Allow Row Insert? — Select if you want users to be allowed to enter a new row in a record with the selected status. When this check box is selected, the first authorization level can authorize existing rows but not new ones.

Personnel Action Processing

In this group box, define whether and where a user can print forms from page with the selected status.

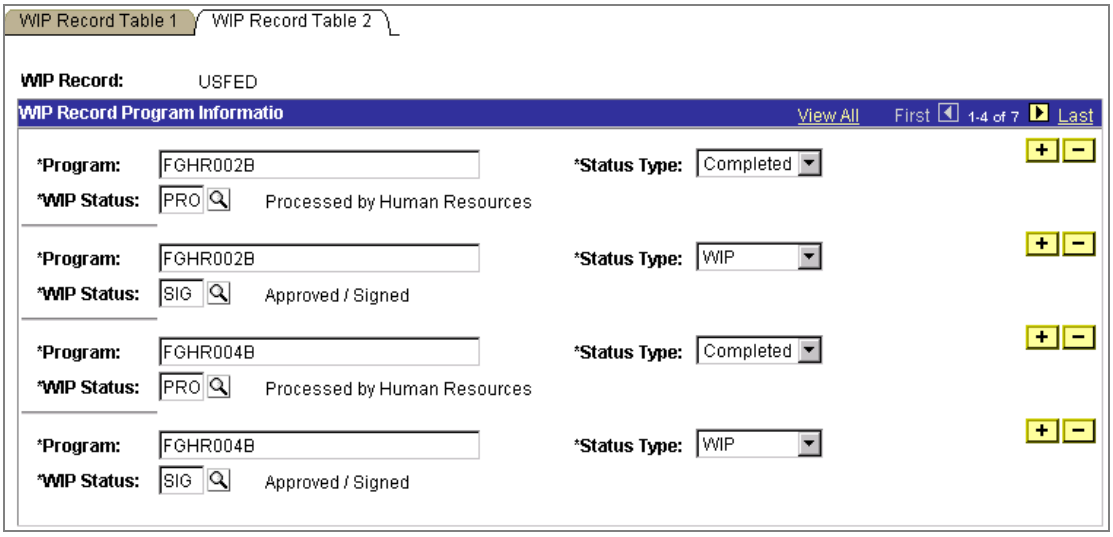
SF-52 Print Area Select the area on the form where the name is to appear; for example, ***Part A - Box 6: Authorized By.***

Allow SF-50 Print? Select if you want the SF-50 form to be printed for this status.

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 entries.

Identifying the Programs and Defining the Data

Access the WIP Record Table - WIP Record Table 2 page.



WIP Record Table - WIP Record Table 2 page

The **Program** is the name of the Structured Query Report (SQR) file, COBOL, or database agent process that inserts a new row based on the status type. The row that the system inserts is the highest effective-dated row with the status type that is specified in the **Status Type** field.

For example, in the exhibit above, based on a status type of ***Completed*** for the program ***FGHR002B,*** the system inserts a new row and displays ***PRO (Processed by Human Resources)*** in the **WIP Status** field. Therefore, the **WIP Status** field designates the WIP status for the new row, and the **Status Type** field designates the status type from which to insert.

Program Enter the name of the program's SQR file, COBOL, or database agent process that inserts a new row.

When setting up your system, you can add programs by placing your cursor in the **Program** field and clicking the **Insert Row** button on the toolbar.

Status Type Options are as follows:

Completed: The system searches for both *Completed* and *Corrected.*

WIP: The system searches for *WIP, Completed,* and *Corrected.*

When setting up your system, you can change these status type options.

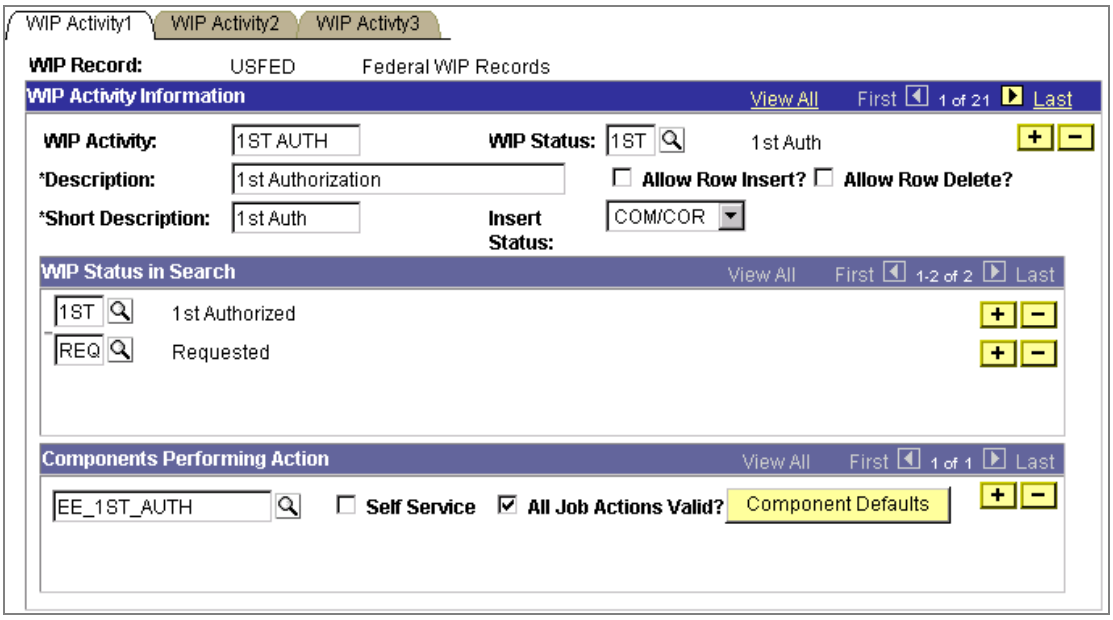
To continue entering and reviewing data on this page, place your cursor in the scroll bars on the right side of a data group and click to scroll through the entries.

Pages Used to Define WIP Activity Processes

Page Name	*Object Name*	*Navigation*	*Usage*
WIP Activity Table - WIP Activity1	GVT_WIP_ACTVTY1	Define Business Rules, Define WIP Parameters (USF), Setup, WIP Activity Table, WIP Activity1	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.
WIP Activity Table - Component Defaults	GVT_WIP_PGRP_SEC	Click the Component Defaults button on the WIP Activity Table - WIP Activity 1 page.	Set default values for the selected component.
WIP Activity Table - WIP Activity 2	GVT_WIP_ACTVTY2	Define Business Rules, Define WIP Parameters (USF), Setup, WIP Activity Table, WIP Activity2	Select the action for each component for each activity.
WIP Activity Table - WIP Activity 3	GVT_WIP_ACTVTY3	Define Business Rules, Define WIP Parameters (USF), Setup, WIP Activity Table, WIP Activity3	Make the WIP status available for input for the selected components.

Linking WIP Activities to Components

Access the WIP Activity Table - WIP Activity1 page.



WIP Activity Table - WIP Activity1 page

WIP Activity Information

WIP Activity Enter the activity for which you are defining controls.

WIP Status Select the WIP status for this WIP record.

Allow Row Insert? For effective-dated records only. Select to permit users to insert rows using this WIP activity.

Allow Row Delete? For effective-dated records only. Select to permit users to delete rows using this WIP activity.

Insert Status Defines the WIP status codes that appear when you insert a new row or when you are in Add mode. For example, when you enter a WIP status of ***Hire*****,** you aren't inserting a row, but 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 that are linked to this activity retrieves only employees with rows that contain a WIP status that matches what is in this table.

Components Performing Action

Select the components that the WIP activity uses to perform the actions. An activity (for example, a request) can have more than one component associated with it. For example, the components for Employee Request (EE_EMPL_REQ) and Supervisor Request (EE_SUP_REQ) are request-like activities and can be included under the Request activity.

Self Service	Select if the component is a self-service component. When this check box is selected, the component automatically inserts a row when it is initialized. This is like adding a new row.
All Job Actions Valid?	Select if all job actions are valid for this component.
Component Defaults	Click this button to enter component defaults.

Setting Default Values for Components

Access the WIP Activity Table - Component Defaults page.

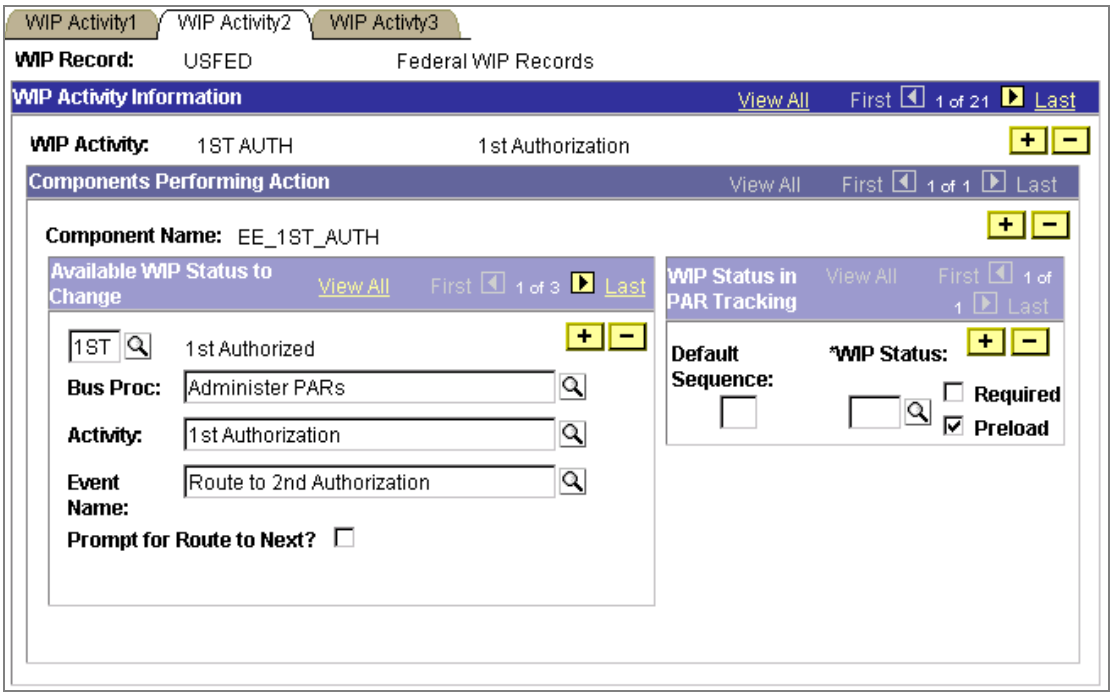


WIP Activity Table - Component Defaults page

Action	Select the default value for this component. When the component is used, this value populates the Action fields on the PAR (personnel action request) pages. You cannot change this value from the PAR pages.
Reason Code	Select the default value for this component when it performs this WIP Activity.
Nature of Action Code	Select the default value for this component when it performs this WIP Activity.
Legal Authority (1)	Select the default value for this component when it performs this WIP Activity.
Legal Authority (2)	Select the default value for this component when it performs this WIP Activity.

Selecting Actions for Components

Access the WIP Activity Table - WIP Activity 2 page.



WIP Activity Table - WIP Activity2 page

Components Performing Action

Component Name Displays the name of the component that you selected on the WIP Activity 1 page.

Available WIP Status to Change

The statuses that you specify in this group box determine what the users see when they click the prompt button for the WIP Status field on the PAR (personnel action request) pages. The user sees only the statuses that you have designated on this page.

Component Name Displays the names of the components that you entered on the WIP Activity 1 page.

Bus Proc (business process), **Activity, Event Name** The **Bus Proc, Activity,** and **Event Name** fields are signals for PeopleSoft Workflow. These entries govern the routing of the action through the various PeopleSoft Human Resources business processes.

To modify the routings, you create a new business process activity and event in PeopleSoft Application Designer. On this page, you insert the name of the new process and define its routing. The system retrieves the name of the process from this table and triggers that event when the user saves the activity with the WIP status that you have designated.

Prompt for Route to Next? Select to specify the routing prompt list views that are to be used on the prompt page.

When this check box is selected, you can enter the parameters for the routing process in the two new fields that appear: **Using** and **Routing Text.**

When this check box is selected, a new page appears when the user clicks **Save.** On the new page, the user selects from the list of employees who are in the result set of this view. The user routes the request to the selected employee for the next level of approval.

In **Routing Text,** the user specifies the next routing of this action.

WIP Status in PAR Tracking

Default Sequence Select the default sequence of a WIP status in PAR (personnel action request) tracking.

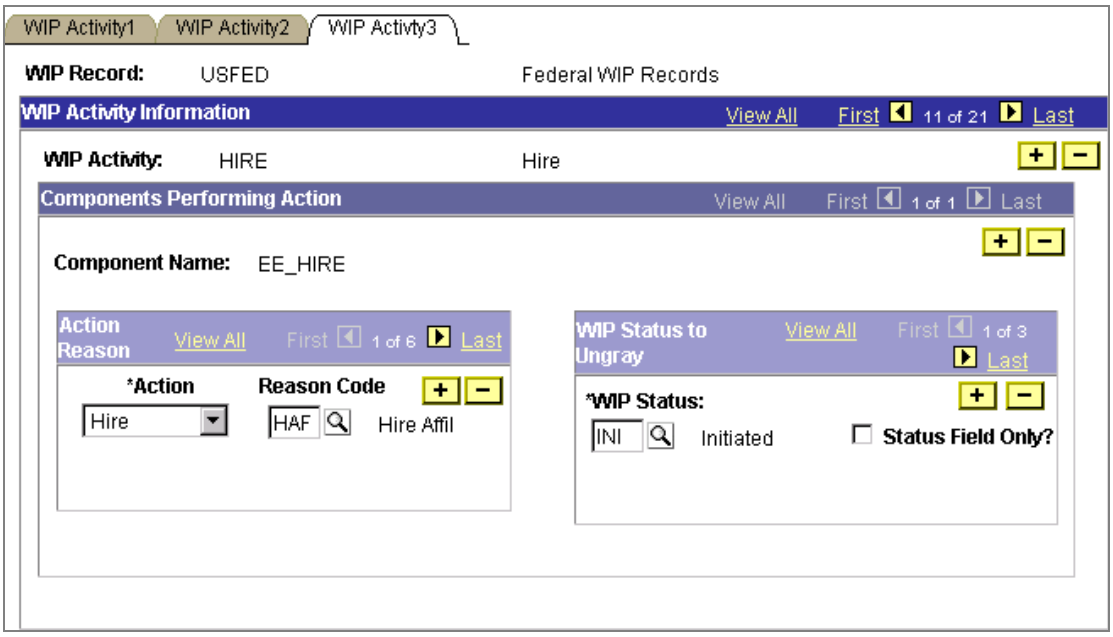
WIP Status Select the WIP status for the sequence you are defining.

Required Select if the sequence is required.

Preload Select if the sequence is Preload.

Making WIP Statuses Available to Components

Access the Activity Table - WIP Activity 3 page.



WIP Activity Table - WIP Activity3 page

Action Reason

Action Enter the action for the identified component that appears in the **Component Name** field. The **Action** and **Reason Code** values control what values are available from the Action/Action Reason prompts. You see these values only when you are administering the PAR (personnel action request) using the component and activity.

Reason Code Enter the reason code for the component that appears in the **Component Name** field. The **Action** and **Reason Code** values control what values are available from the Action/Action Reason prompts. You see these values when you are administering the PAR using the component and activity.

WIP Status to Ungray

WIP Status Select the WIP status that is to be available for input.

Status Field Only? Select if this is a status field only.

Overviews - Sample System Parameters

Following are overviews of the sample system's Administer Workforce PAR, WIP parameters and WIP status code parameters.

Administer Workforce PAR and WIP System Parameters

The tables that follow contain the sample system's Administer Workforce PAR and WIP parameters. Our sample system assigns and uses the following WIP status codes, PAR status codes, and the users who access them.

WIP Status	*PAR Status Code*	*Who Can 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 (individual retirement record 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 Type	*WIP Status Code*
Work-in-progress	Initiated
Work-in-progress	Requested

Status Type	*WIP Status Code*
Work-in-progress	1st Auth (first authorization)
Work-in-progress	2nd Auth (second 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 (returned for more information)
Work-in-progress	Withdrawn
Work-in-progress	Dis (disapproved)
Corrected	Cor (corrected)
Canceled	Can (canceled)
Completed	PRO (processed by HR)
IRR Reported (individual retirement record reported)	IRR (IRR reported)

Sample System - WIP Parameters Setup

The WIP parameters are set up in the sample system as follows:

WIP Activity	*Description*	*Allow Row Delete/ Insert*	*Default WIP Status*	*Component Performing Action*	*WIP Status in Search*	*WIP Status Field to Ungray*
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

WIP Activity	*Description*	*Allow Row Delete/ Insert*	*Default WIP Status*	*Component Performing Action*	*WIP Status in Search*	*WIP Status Field to Ungray*
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
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

WIP Activity	*Description*	*Allow Row Delete/ Insert*	*Default WIP Status*	*Component Performing Action*	*WIP Status in Search*	*WIP Status Field to Ungray*
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
SUP REQST	SUP REQST	Insert	REQ	EE_SUP_REQ	PRO, INI, REQ	INI, REQ
TERMINATN	TERMINATN	Insert	REQ	FG_EE_TERMINATION		REQ
W3_PERS_DT	W3_PERS_DT		PRO	W3_GVT_PERS_DATA	PRO	PRO, REQ

CHAPTER 19

Working With Multiple Components of Pay

This chapter provides an overview of the Multiple Components of Pay feature and tells you how to:

- Set up Multiple Components of Pay.
- Define groups of rate codes.
- Administer seniority pay.
- Define compensation rates for workers.
- Set up rules-driven component defaulting.
- Understand compensation defaults.
- Refresh employee compensation.

Understanding Multiple Components of Pay

With Multiple Components of Pay functionality, you define pay components to determine employee compensation. You can associate pay components with customized rules that use Job record fields to calculate compensation variables consistently throughout your organization.

Pay components might include:

- Regular pay.
- Additional pay for work under hazardous conditions.
- Pay for work in a different job.
- Pay for an equipment allowance.

Pay components might represent:

- An hourly rate.
- A flat amount.

- An addition to the base hourly rate.

With Multiple Components of Pay, you can:

- Figure a percentage of a worker's base pay and use it as a pay component.
- Compensate workers using salary points.
- Create unique compensation packages for each employee.

Administering Multiple Components of Pay

In the following overview, the first step—defining rate codes—is required. The remaining steps are optional, but they provide invaluable functionality for rate code use.

To Administer Multiple Components of Pay:

1. Define rate codes on the Comp Rate Code Table page.
2. Define rate code classes on the Rate Code Classes page.
3. Define rate code groups on the Rate Code Groups page.
4. To enable Rate Code Groups, select the Rate Code Groups check box on HRMS Options page of the Installation component.

   Rate code groups enable you to calculate a percentage of selected base pay rate codes in a compensation package on the:

   - The Salary Step Components page of the Salary Grade component.
   - The Default Compensation page and the Non-Base Compensation page of the Job Code component.
   - The Compensation page of the Job Data component.
5. Associate rate codes with salary steps on the Salary Step Components page of the Salary Grade component.
6. Associate rate codes with job codes, positions, and employee job records.
7. Compensate workers using salary points:

   a. Select the Salary Points check box on the Options page of the Installation component.

   b. Set up the Salary Points monetary value on the Default Settings page of the Company component.

   c. Associate the point value (an integer) with rate codes on:

      - The Salary Step Components page of the Salary Grade component.

- The Default Compensation page and the Non-Base Compensation page of the Job Code component.
- The Compensation page of the Job Data component.

See Also

"Setting Up PeopleSoft HRMS," Selecting HRMS Options

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Setting Up Salary Plans, Grades, and Steps," Associating Salary Components With Salary Steps

"Setting Up Jobs and Pay Groups," Classifying Jobs

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Worker Compensation Information

PeopleSoft Human Resources PeopleBook: Manage Positions, "Setting Up Positions," Entering Job Information

Common Elements in This Chapter

Frequency	Enables you to select a frequency (hourly, daily, monthly, annually, and so on) to express the compensation rate.
Base Pay	Pay for a regularly assigned workweek. A pay component that is included in the job comp (job compensation) rate calculation. 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 that is 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 that build the compensation packages in that record.
Rate Code	IDs for pay components. Rate codes define rates of pay and are set up in the Comp Rate Code (compensation rate code) Table. Rate codes 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) that are 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.
Rules Driven Pay Components	Pay components that operate using a rule set up on the Comp Rate Code Rules component to determine the appropriate rate code to assign to an employee.
Salary Step Components	Pay components that are assigned to a salary step by entering the corresponding rate codes on the Salary Step Components page.
Seniority Pay	A premium that is paid for the length of time that an employee works for an organization.
Seniority Pay Components	Pay components for which 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 that are 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 Seniority Pay page of the Comp Rate Code component.

Setting Up Multiple Components of Pay

If you are assigning rate code classes to rate codes, define the rate code classes before creating rate codes.

This section describes how to:

- Create rate code classes.
- Define rate codes.
- Associate seniority rate codes with compensation increases.
- Assign default rules to comp rate codes.

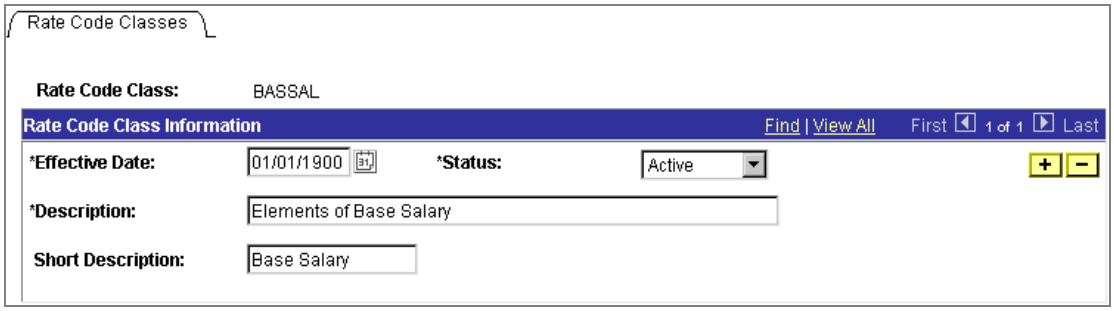
Pages Used to Set Up Multiple Components of Pay

Page Name	*Object Name*	*Navigation*	*Usage*
Rate Code Classes	RATECD_CLASS_TBL	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	Create rate code classes.
Comp Rate Code Table (compensation rate code table)	COMP_RATECD_TBL	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	Define rate codes.

Page Name	Object Name	Navigation	Usage
Comp Rate Code Table - Seniority Pay	SENIORITY_PAY	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	Associate a seniority rate code with levels of compensation increases: by amount, points, or percentage of pay. Associate a seniority rate code with one or more groups that you define in the Group Build module.
Rules	COMP_RATECD_RUL	Define Business Rules, Define Payroll Process, Setup 1, Comp Rate Code Table, Rules Define Business Rules, Define Payroll Process (USF), Setup 1, Comp Rate Code Table, Rules Define Business Rules, Manage Human Resources (GBL), Setup, Comp Rate Code Table, Rules	View the combination rules and the associated amounts that this rate code is assigned to.

Creating Rate Code Classes

Access the Rate Code Classes page.



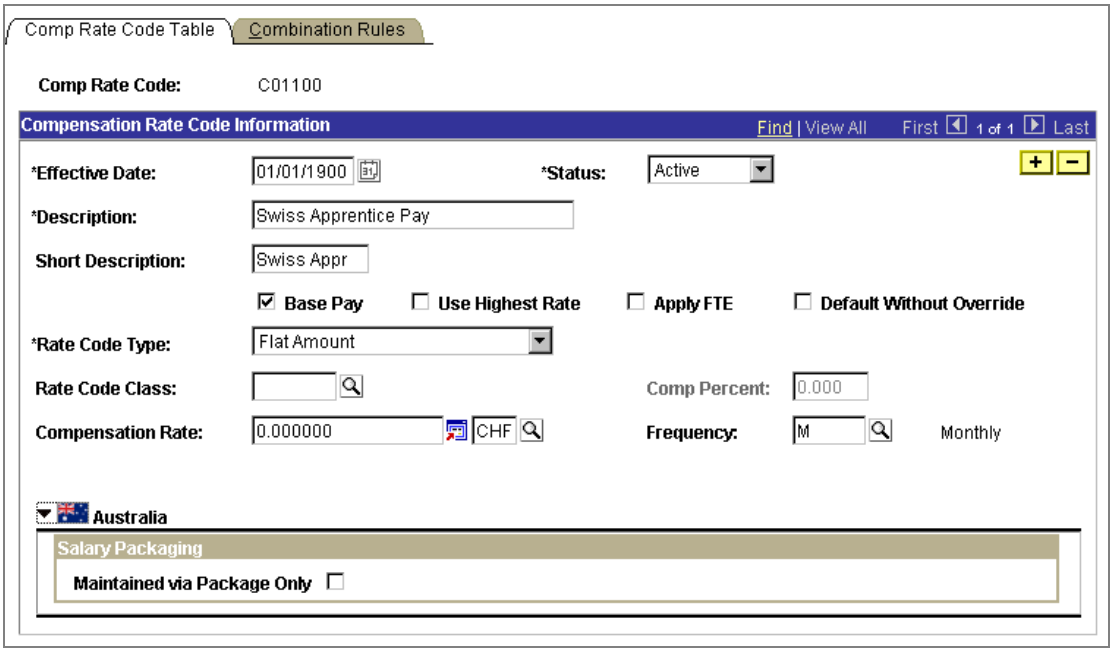
Rate Code Classes page

You can associate individual rate codes with rate code classes. These classes limit the search for rate codes on the pages throughout the system. After you create rate code classes on this page, you assign them to rate codes on the Comp Rate Code Table.

The predefined rate class SENPAY enables you to bundle rate codes used to administer seniority pay to workers.

Defining Rate Codes

Access the Comp Rate Code Table page.



Comp Rate Code Table page

Use Highest Rate

Select 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 and does not affect human resources processing.

For Payroll for North America: When you assign rate codes at the job level, you can enter compensation rates that differ from the rate defined for the rate code. If you clear this check box, the rate that you specify at the job level overrides this rate.

Apply FTE (apply full-time equivalency)

Select for the rate code to be calculated as part of FTE. FTE is the percentage of full time that the employee normally works 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 Standard Work

Period fields in the Installation Table.

For Payroll for North America: Select this check box to include full time equivalency in the job in the calculation of a base pay rate. Enter 1 for a full-time employee working 40 hours per week and .5 for a part-time employee working 20 hours per week. You can select this check box only when the rate code type is Flat Amount or Hourly Rate. This check box does not apply to non-base-pay rates and is unavailable for entry if you clear the Base Pay check box.

Default Without Override

Select to ensure that compensation packages of the employees assigned to this rate code cannot be manually updated on the Compensation page of the Job Data component. You must select this option for seniority rate codes.

Note. We do not recommend clearing this option for rate codes used as absorbable premiums on the Salary Plan Table once the rate code has been added to employee compensation packages.

Rate Code Type

Select a rate code type. Depending on the type you select, certain fields become available for entry. Values are:

- ***Flat Amount:*** A flat (or fixed) amount.
- ***Hourly Rate + Flat Amount:*** A flat amount that is paid in addition to the hourly rate that is specified on the worker's timesheet. Enter the flat amount in the **Comp Rate** field. 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 that are 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 whenever you define rates of pay using comp rate codes.

Note. To use points, select the Salary Points check box on the Installation Table - HRMS Options page.

Rate Code Class

Select a rate code class to associate with a rate code. Values are:

Elements of Base Salary (BASSAL): Used in salary forecasting.

Defined Range Rate Codes (DFRPAY) is used for pay components based on grade ranges within salary plans.

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): Used in salary forecasting.

Comp Percent (compensation percentage)
Enter the percent to use as a percentage calculation for all base pay components or a percentage of a rate code group where the rate code group contains one or more base pay components.

Compensation Rate
Select a currency from the list of values.

Frequency
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.

Earnings Code
Earnings codes define the way that earnings are calculated and taxed. You establish earnings codes on the Job Earnings Distribution page.

Australia

Maintained via Package Only
When implementing PeopleSoft Salary Packaging for Australia, use this page to define and review the compensation rate codes you will use to package your employees. Compensation rate codes represent the IDs that you use for your pay components throughout your Salary Packaging system.

When defining your salary package components and additional components, you can link them to compensation rate codes to help you enter expenditures against the appropriate components. If you are going to use pay components with salary packaging, select this checkbox to create this link.

You must have a unique rate code for each package component or additional component (identified as an expense payroll type) to facilitate reconciliation of package expenditure. Selecting this checkbox prompts a warning message if you manually change an employee's compensation rate codes. A

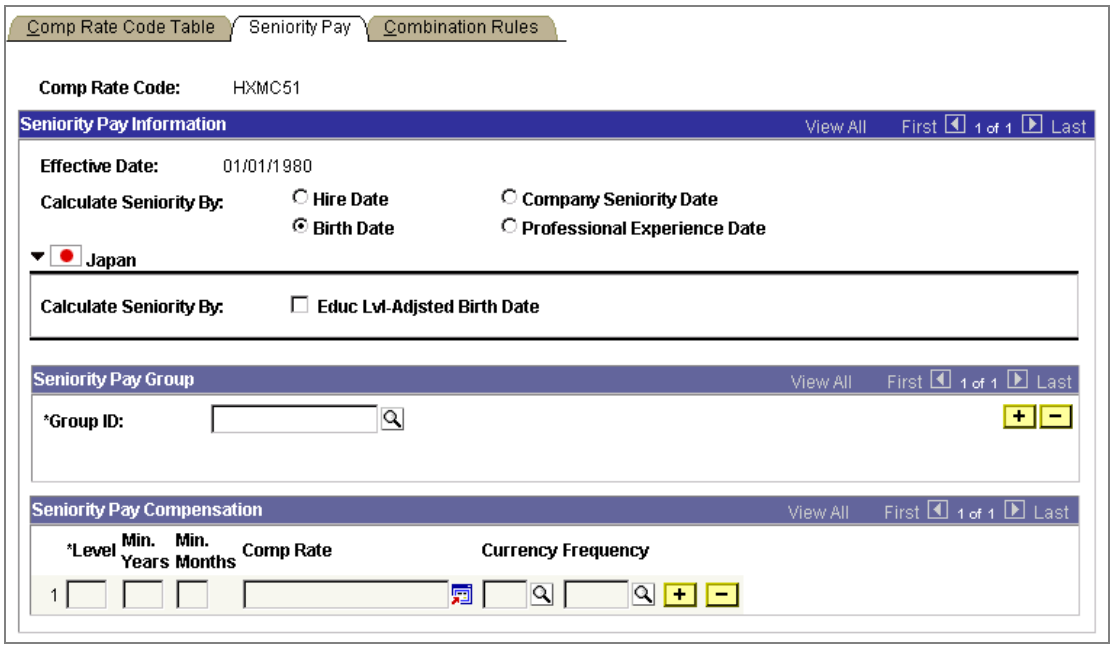
This check box, combined with other information on the employee's Job record, works to maintain salary package integrity.

See Also

PeopleSoft Human Resources PeopleBook: Administer Salary Packaging

Associating Seniority Rate Codes With Compensation Increases

Access the Seniority Pay page.



Seniority Pay page

Calculate Seniority By Select the type of date on which to base seniority. Values are:

- ***Hire Date***
- ***Company Seniority Date:*** This date tracks the amount of time that an employee has been with a particular company in the organization. The default date is the hire date, but you can override it.
- ***Birth Date***
- ***Professional Experience Date:*** The date that the employee began working in a job requiring the skills that are directly related to the current position.

(JPN) Japan

Educ Lvl-Adjsted Birth Date (education level-adjusted birth date) Select to calculate education level age-related pay—a type of seniority pay commonly paid by Japanese organizations.

See Also

"Setting Up Local Country Functionality," Setting Up the Education Level Age Table

Seniority Pay Group

Group ID — Enter one or multiple group IDs to associate the seniority rate code with groups that you define in the Group Build module. The system issues a warning if the ID that you enter is associated with another seniority rate code. When you move out of this field, the name of the group ID appears.

Note. If you do not enter a group ID, the system associates the seniority rate code with every worker's compensation package.

Seniority Pay Compensation

Level — Enter a seniority level.

Min. Years (minimum years) and **Min. Months** (minimum months) — Enter the minimum years and months of service that are necessary to qualify for the seniority level. If you enter both **Min. Years** and **Min. Months,** the system uses the total of those years and months in its calculation.

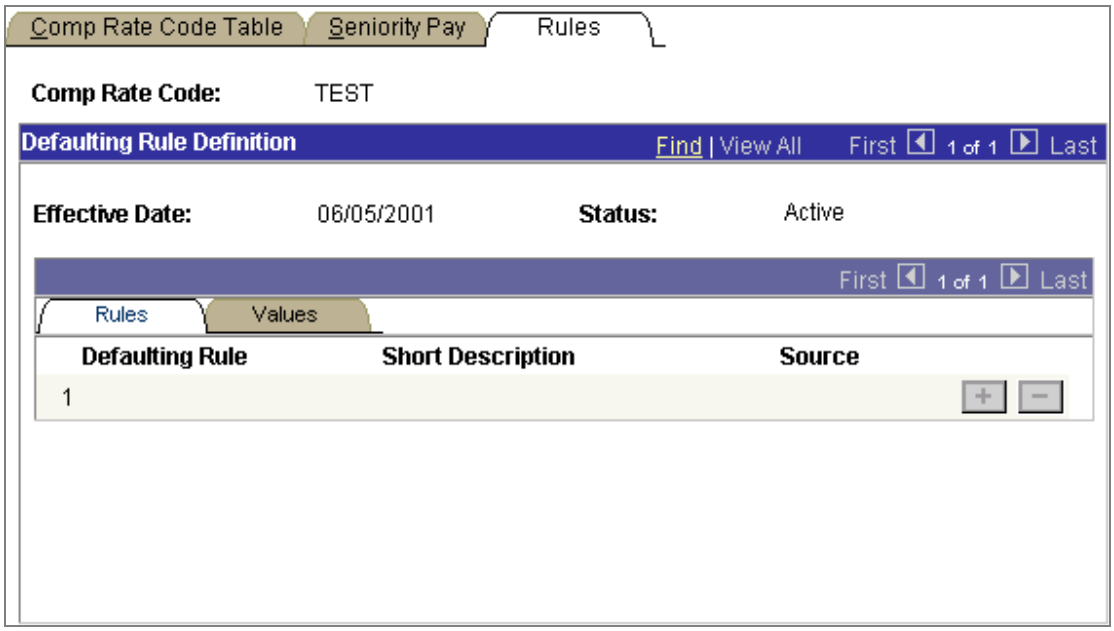
Comp Rate (compensation rate) — Enter a compensation rate to associate with this seniority level.

See Also

"Working With Groups," Setting Up Group Definitions

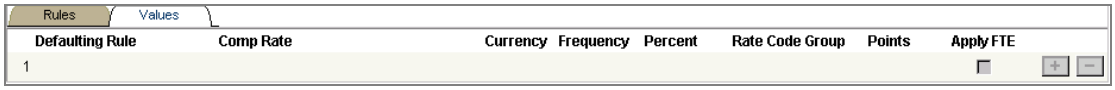
Assigning Defaulting Rules to Comp Rate Codes

Access the Rules page.



Rules page

The fields on this page are available for entry when Base Pay is selected on the Comp Rate Code Table page.



Values

Comp Rate, **Currency**, **Frequency**, **Percent**, **Rate Code Group**, **Points**, and **Apply FTE**

Enter the compensation information to automatically populate the employee's compensation record

Defining Groups of Rate Codes

Once you have defined rate codes, you can optionally set up rate code groups. Using rate code groups, you can:

- 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.

- Calculate a bonus amount based only on certain pieces of your employee's compensation package, as opposed to the entire package.

You may want to do this if a percentage-based bonus is also part of the employee's compensation.

- Bundle base-pay components that you want the system to use in its calculation, excluding other pay components.

You can associate a rate code group with a percentage rate code:

- In a salary step on the Salary Step Components page of the Salary Grade component
- With a job code on the Default Compensation and Non-Base Compensation pages of the Job Code component.
- At the employee level on the Job Data - Compensation page.

If you do so, the system applies a specific percentage to all the rates in the rate code group and adds the total to the employee's compensation package. Or you can calculate percentage rates using the employee's entire base-pay compensation package, and not use rate code groups at all.

When you implement a pay increase for an employee, you can specify that the employee is to receive a percentage increase of base pay as defined in the rate code group. When the system calculates the value of the increase, its calculation is based on the different pay rates that are associated with the base-pay rate group.

Page Used to Create Groups of Rate Codes

Page Name	*Object Name*	*Navigation*	*Usage*
Rate Code Groups	COMPRT_GRP_PNL	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	Create groups of rate codes.

Administering Seniority Pay

Many organizations pay a premium for seniority. Seniority is the length of time that employees work for the organization. This section describes how to:

- Administer seniority pay.
- Run the Update Seniority Pay and Update Seniority Eligibility processes.
- Update seniority pay.
- Ensure worker eligibility for seniority pay components.

Pages Used to Administer Seniority Pay

Page Name	*Object Name*	*Navigation*	*Usage*
Seniority Pay	RUNCTL_SENPAY2	Administer Workforce, Administer Workforce (GBL), Process, Update Seniority Pay, Update Seniority Pay	Add and update seniority pay components in workers' compensation packages.
Seniority Pay Page	RUNCTL_SENPAY	Administer Workforce, Administer Workforce (GBL), Process, Update Seniority Eligibility	Ensure that workers are still eligible for seniority pay components. Before using this page you must have created seniority rate codes by associating a rate code with a seniority rate code class on the Comp Rate Code Table page.

Administering Seniority Pay

To administer seniority pay:

1. On the Seniority Pay page of the Rate Code component:
   a. Create seniority rate codes by associating a rate code with the predefined seniority rate code class SENPAY.
   b. Associate a seniority rate code with levels of seniority compensation increase.
   c. You can also associate a seniority rate code with one or more groups that you define using Group Build.
2. Run the Update Seniority Pay process (CMP013) to add and update seniority rate codes in worker compensation packages.

You can also add seniority rate codes to worker compensation packages manually. Even though you add these codes manually, the Update Seniority Pay (CMP013) process updates them.

3. 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 the seniority rate codes that were added manually.

4. Run the Multiple Seniority Components report and review the employee records that have multiple seniority rate codes and determine whether the seniority components are appropriate.

See Also

"Working With Groups," Setting up Group Definitions

Running the Update Seniority Pay and Update Seniority Eligibility Processes

The Update Seniority Pay process 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 codes.

If the worker's compensation package contains the seniority rate code:

1. The system checks to see if adequate time has passed for the worker to reach the next seniority level.

2. 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:

1. The system inserts a new job row with an action of Pay Rate Change and a new action reason of SEN (seniority).

2. The system updates the worker's compensation package to add the seniority rate code.

To run the Update Seniority Pay and Update Seniority Eligibility processes:

1. Run the Application Engine process HR_CMP013 (for the Update Seniority Pay process) or HR_CMP014 for the (Update Seniority Eligibility process).

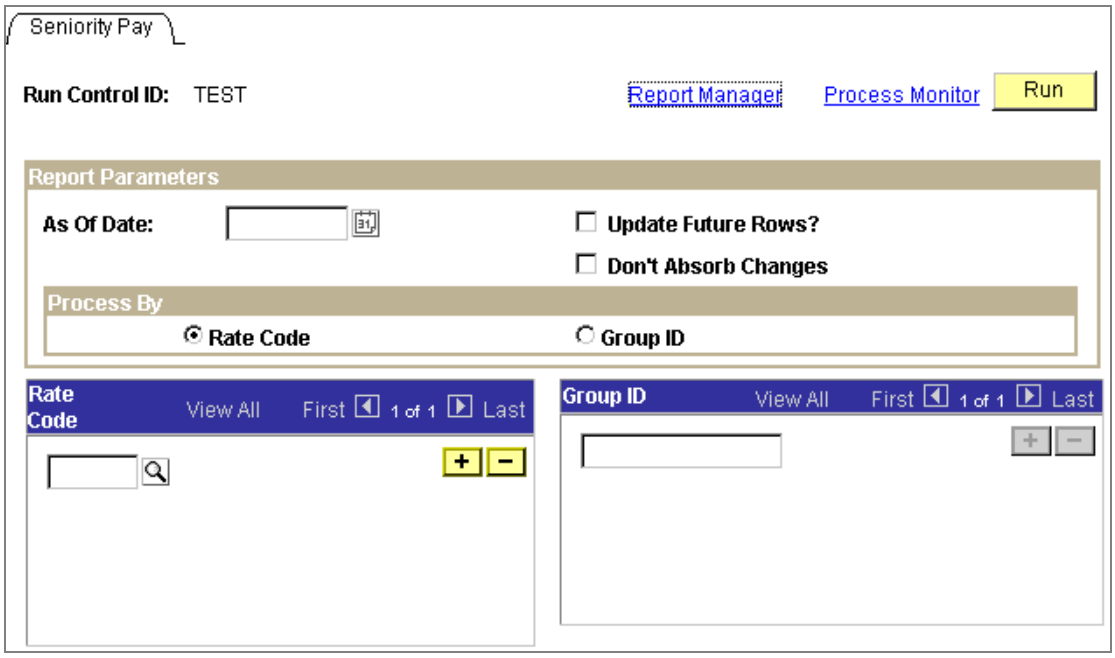
   The Application Engine processes find the employees that fall within the run control parameters and loads the information into a temporary table.

2. Run the SQR report CMP013 (Update Seniority Pay Reporting) or CMP014S (Update Seniority Eligibility Reporting) to review the data created by the Application Engine process.

3. Run the Application Engine process HR_CMP013_CI (Update Seniority Pay) or HR_CMP014_CI (Update Seniority Eligibility) to load all the data to the employee Job Data pages.

Updating Seniority Pay

Access the Seniority Pay page.



Update Seniority Pay page

Update Future Rows? When you select this option, the process updates all existing future effective-dated rows (rows that have an effective date later than the as of date) in addition to the effective dated row it is adding or correcting.

Don't Absorb Changes Select to leave absorbable rate codes unchanged if there is a change in the defaulted salary amount.

This option only applies to employees who have a target comprate and are assigned to a salary plan with the Auto Calculated Premium function enabled.

Process By Select **Rate Code** or **Group ID** as the way to run the Update Seniority Pay process (HR_COMP013).

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 that 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.

Group ID: The process adds or updates seniority rate codes in the compensation packages of all employees who are associated with the groups you list on this page.

Rate Code This field is available when you select **Rate Code** in the **Process By** group box. Select one or more rate codes. 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 when you select **Group ID** in the **Process By** group box. Select one or more group IDs. 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.)

See Also

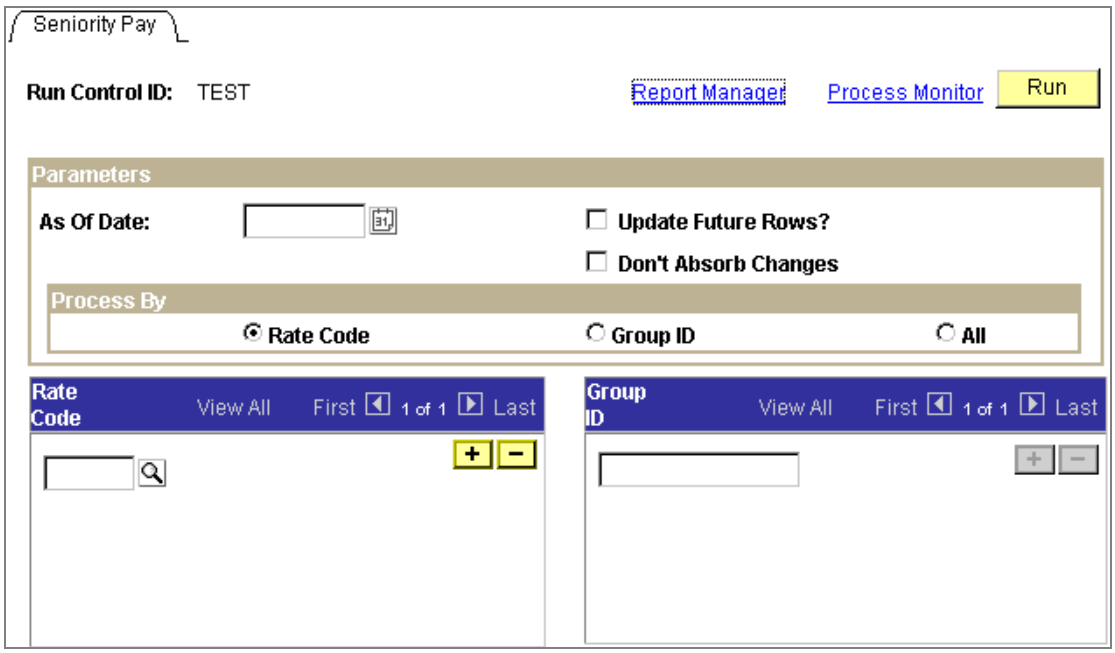
PeopleSoft Human Resources PeopleBook: Plan Salaries, "Setting Up Salary Plans, Grades, and Steps," Defining Salary Plan Characteristics

"Working With Groups," Setting Up Group Definitions and Setting Up Group Security

PeopleTools PeopleBook: Process Scheduler

Ensuring Worker Eligibility for Seniority Pay Components

Access the Seniority Pay page.



Update Seniority Pay page

Process By Select **All** to run the report for all employees.

If a worker is not eligible, this process updates the employee compensation package by removing the seniority rate codes. However, this process does not remove seniority rate codes that were added manually.

Note. All fields but one on this page are identical to fields on the Seniority Pay page.

See Also

Updating Seniority Pay

Defining Compensation Rates for Workers

After you define rate codes (and optional categories such as rate code classes and groups), you can define compensation rates for workers. Defining worker compensation is fully documented in other chapters of PeopleSoft HRMS PeopleBooks, as shown by the table below.

Overview of Steps for Defining Rates of Pay

Associate rate codes with:	***On the:***
salary steps	Salary Grade Table – Salary Step Components page

Associate rate codes with:	*On the:*
job codes	Job Code Table – Default Compensation and Non-Base Compensation pages
positions (using the job codes you assign to them)	Position Data component – Job Information page
employee records	Job Data component– Compensation page

You can also associate a point value (an integer) with rate codes on each of these pages (with the exception of the Position Data component – Job Information page).

See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Setting Up Salary Plans, Grades, and Steps," Associating Salary Components With Salary Steps

"Setting Up Jobs and Pay Groups," Associating Salary Plan Information and Base Pay Rate Codes With a Job Code and Associating Non-Base Rate Codes With a Job Code

PeopleSoft Human Resources PeopleBook: Manage Positions, "Setting Up Positions," Entering Job Information

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce,"

Setting Up Rules-Driven Component Defaulting

Use Rules-Driven Component Defaulting to define flexible defaulting rules for rate codes. Select the Job Data fields that affect compensation in your organization and indicate the field values that should result in a rate code change in an employee's compensation package.

Use the pages in the Rate Code Defaulting Rules component to define the salary component defaulting rules for each field you selected in the Defaulting Options page. For example, to set up a rule that would default compensation based on the salary plan and location of an employee, you select the Location and Salary Plan fields on the Defaulting Options page. On the Rate Code Defaulting Rules component, you define the rule and indicate which location and salary plan values trigger salary component defaulting and which new rate codes apply. After you have saved the rule and activated component defaulting in the Job Data component using the Default Components button, the system will use it to default the correct component (or components) into the employee's compensation package.

You can also use the Refresh Employee Compensation process to default the compensation packages of a defined employee group. The system will update the compensation record of any employee who meets the criteria established in the rule whenever you trigger the component defaulting process.

If you don't require more flexible defaulting rules, you can continue to maintain job code and salary step component defaulting on the Job Code and Salary Grade components. You will be able to view rate code defaulting rules with a rate code source of jobcode or salary step on the Rate Code Defaulting Rules component but you cannot edit them here.

The remainder of this section describes how to:

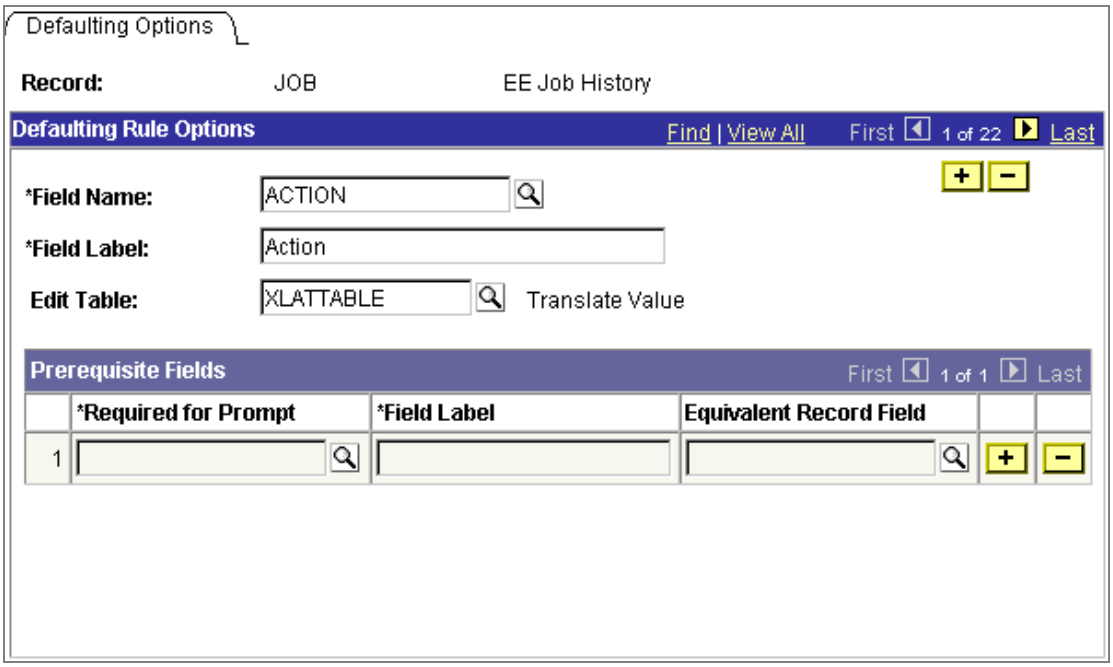
- Specify defaulting options.
- Define rate code defaulting rules.
- Create rate code defaulting rules criteria.
- Associate values with records and fields.
- Assign rate codes to defaulting rules.

Pages Used to Define Rules-Driven Component Defaulting

Page Name	*Object Name*	*Navigation*	*Usage*
Defaulting Options	COMP_DFLT_OPTIONS	Define Business Rules, Manage Human Resources (GBL), Setup, Rate Code Defaulting Options, Defaulting Options	Specify which Job record fields are available to rate code defaulting rules.
Definition	CMP_RULE_DEFN	Define Business Rules, Manage Human Resources (GBL), Setup, Rate Code Defaulting Rules, Definition	Define component defaulting rules.
Criteria	CMP_RULE_CRITERIA	Define Business Rules, Manage Human Resources (GBL), Setup, Rate Code Defaulting Rules, Criteria	Create and modify criteria for component defaulting rules.
Values	CMP_RULE_VALUES	Define Business Rules, Manage Human Resources (GBL), Setup, Rate Code Defaulting Rules, Values	Determine the selection values the fields and operators you selected on the Criteria page should act on.
Rate Codes	CMP_RULE_RATECD	Define Business Rules, Manage Human Resources (GBL), Setup, Rate Code Defaulting Rules, Rate Codes	Assign rate codes to the component defaulting rules.

Specify the Defaulting Options

Access the Defaulting Options page.



Defaulting Options page

Record Select the record that contains the fields you want to make available to the Rate Code Defaulting Rules component.

Defaulting Rules Options

Field Name and **Field Label** Select the field name that you want to make options on the Rate Code Defaulting Rules component.

Edit Table Select the field's edit table.

Prerequisite Fields

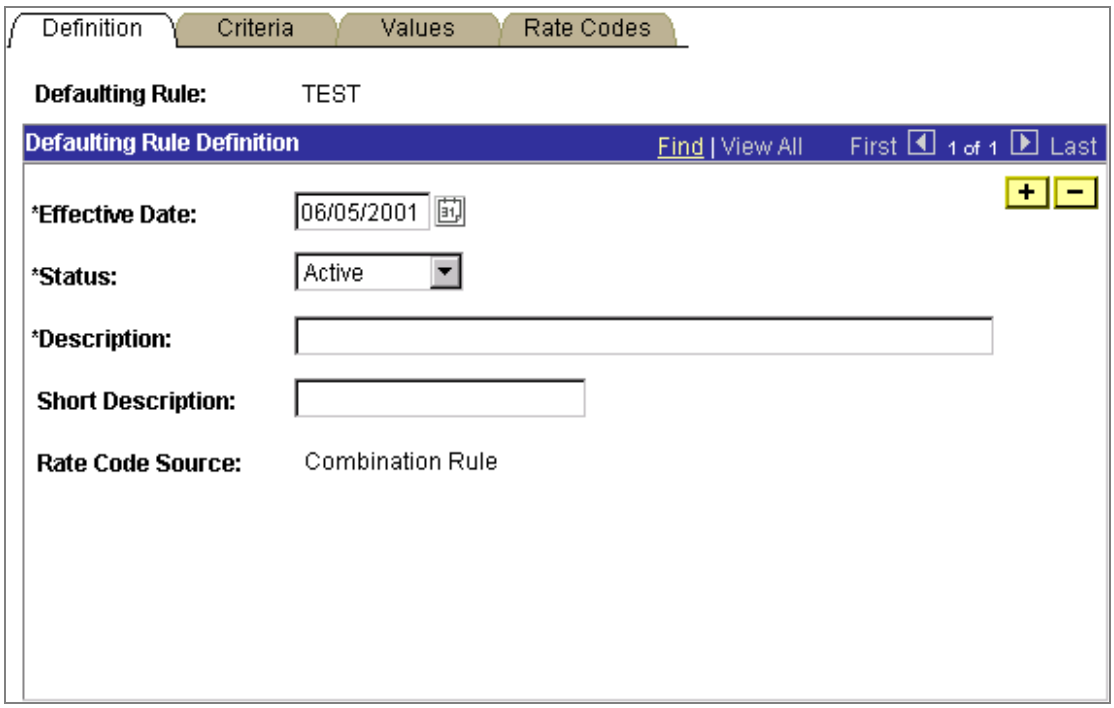
Required for Prompt and **Field Label** Select the field that prompts for the defaulting rules fields, if required. For example, if the defaulting rules field is Department, select SETID (and SetID in the Field Label field) because before you can select a department, you need to select the department's setID.

Equivalent Record Field Select the Required for Prompt field's Job equivalent. For example, the Job equivalent of SETID is SETID_DEPT.

Sometimes the equivalent field is the same as the Required for Prompt field or there is no equivalent field. If there is no equivalent field, leave this field blank.

Defining Rate Code Defaulting Rules

Access the Definition page.

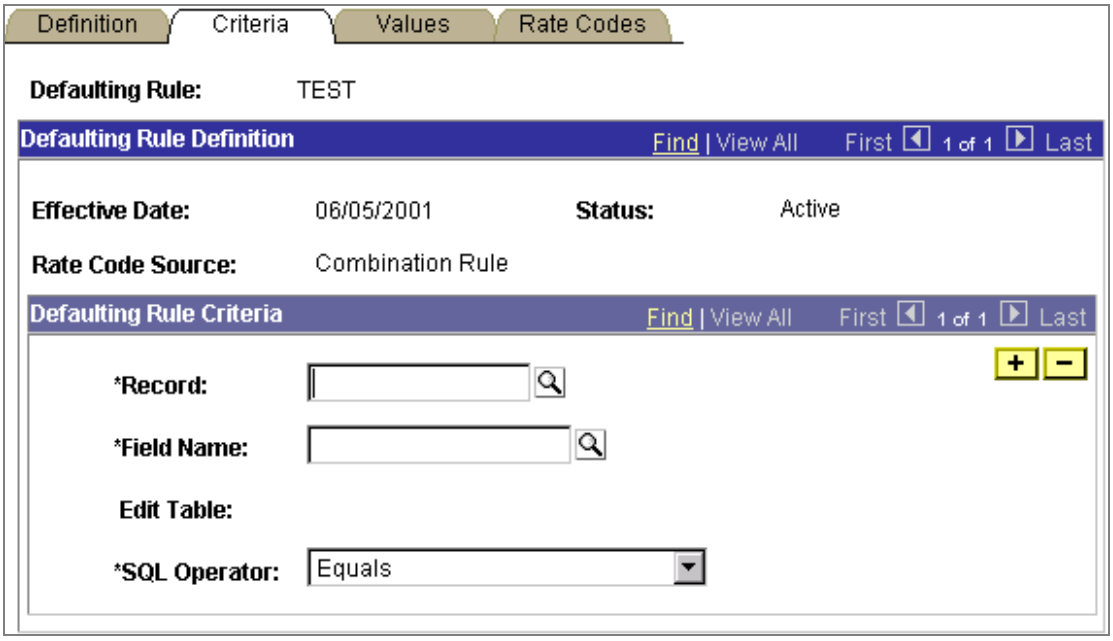


Definition page

Enter the definition of the component defaulting rule. All new defaulting rules have a rate code source of Combination Rule, but you can view defaulting rules with alternate rate code sources here.

Creating Rate Code Defaulting Rules Criteria

Access the Criteria page.



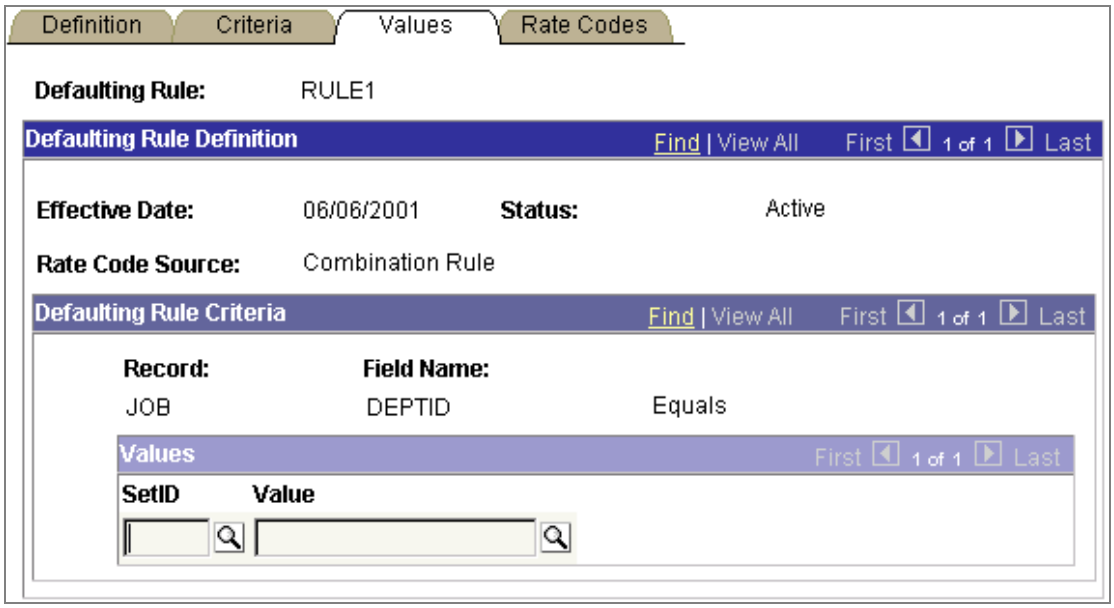
Criteria page

Record, **Field Name**, and **Edit Table** — Select the record and the name of the field whose value will trigger this rule. The system will display the field's edit table.

SQL Operator — Select the SQL operator that defines the relationship of the rule to the field values that you select on the Values page. For example, select ***Equals*** for the rule to act only on employees who have the field value specified on the Values page.

Associating Values with Records and Fields

Access the Values page.



Values Page

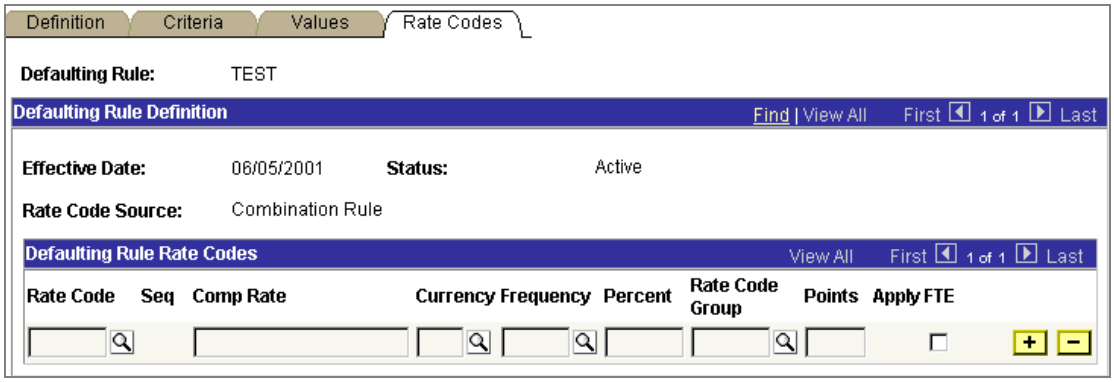
prompt field and **Value**

(in this screen shot the prompt field is labeled **SetID**)

If a prompt is required for the Value field, select the appropriate prompt value here. For example, a department value prompt field is SetID, and you would select the department's setID in the Value field.

Assigning Rate Codes to Defaulting Rules

Access the Rate Code page.



Rate Codes Page

Rate Code, **Comp Rate**, **Currency**, **Frequency**, **Percent**, **Rate Code Group**, **Points**, and **Apply FTE**

Enter the compensation information to automatically populate the employee's compensation record.

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

When you make a change to any element (or elements) of an employee's Job record that affects compensation, the system will reset the compensation components when you click the Default Compensation button on the Compensation page of the Job Data component. The system performs the following steps:

- Executes rate code defaulting, excluding seniority pay, based on the current values.
- Replaces manual updates in default components with the current default values.
- Replaces the default values in non-updateable components with the current default values.
- Recalculates any compensation-related fields on the Job record, for example, comp rate, annual, hourly, daily amounts, compa-ratio, and so on.

If you don't click the Default Components button after updating any relevant Job Data fields, the system issues a warning when you attempt to save the new record. If you select OK, the system moves you to this page, where you can click this button and make any required changes manually. If you do not click this button, the component package will not be reset until the next time the default component logic is triggered (either by your clicking the button or by a batch update process).

Click the Recalculate Compensation button (on the Compensation page) to have the system recalculate the employee's compensation without executing any rate code defaulting or replacing any default values. You cannot save the record after modifying the employee's pay components without recalculating the compensation.

Refreshing Employee Compensation

Use the Refresh Employee Compensation process to update employee compensation packages. This process recalculates compensation based on the current values in the system and automatically populates the correct compensation amount by inserting a new Job row (unless there is no change to an employee's compensation). The process replaces manual changes with the new default values.

The Refresh Employee Compensation process executes the same steps as the Default Pay Components button on the Compensation page, but you can update several records at once.

The Refresh Employee Compensation process:

- Inserts a new Job row when you select Add new effective date with the effective date you entered in the As Of Date field.
- Updates the job row that is effective as of the date you select in the As Of Date field.
- Updates any future rows (rows are considered future if they come into effect after the as of date) when you select Update Future Rows.

See Also

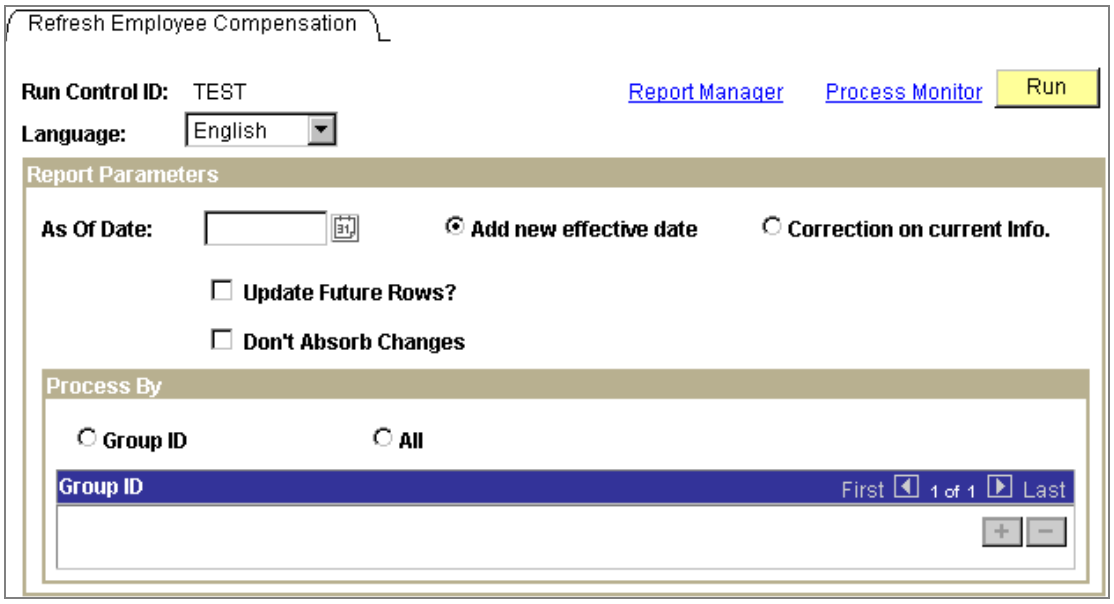
Changing a Compensation Package

Page Used to Refresh Employee Compensation

Page Name	*Object Name*	*Navigation*	*Usage*
Refresh Employee Compensation	RUNCTL_CMP015	Administer Workforce, Administer Workforce, Process, Refresh Employee Compensation	Refresh multiple employee compensation packages with current default values.

Running the Refresh Employee Compensation Process

Access the Refresh Employee Compensation page.



Refresh Employee Compensation page

Report Parameters

As Of Date and **Correction on current Info.**	Select to update data and override information in employee records. The system updates the record that is or was effective as of the date you enter.
As Of Date and **Add new effective date**	Select to insert a new effective-dated row using the reference date as the new effective date. If a record already exists with this effective date, the system inserts a row with the date and a sequence number. If the record is not organized by effective sequence, the system warns you that if the update were to go ahead, it would overwrite data.
Update Future Rows?	Select to update all existing future effective-dated rows (rows that have an effective date later than the as of date) in addition to the effective-dated row already being added or corrected.
Don't Absorb Changes	Select to leave absorbable rate codes unchanged if there is a change in the defaulted salary amount. This option only applies to employees who have a target comprate and are assigned to a salary plan with the Auto Calculated Premium function enabled.

Process By

Group ID	Select to process by group ID. The update process selects all employees with the group ID you specify.
All	Select to process all employees you have security access to.

See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Setting Up Salary Plans, Grades, and Steps," Defining Salary Plan Characteristics

CHAPTER 20

Working With Multiple Jobs

This chapter provides an overview of working with Multiple Jobs and tells you how to:

- Activate Multiple Jobs functionality.
- Change Search Views for Base Benefits.

Understanding Multiple Jobs

Employees who hold more than one job at the same time create unique requirements for the 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 to comply with regulatory requirements.
- Determine benefit and pension eligibility.
- Calculate deductions and credits for payroll processing.

The PeopleSoft Multiple Jobs feature enables you to hire an employee into more than one job at any time. For example, an employee works at a university with a hospital. The university and hospital are set up as separate companies. The employee holds three concurrent jobs: as a professor at the university, as a dean at the university, and as a physician at the hospital.

You also use the 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 chapter, we discuss how Multiple Jobs handles concurrent jobs in People Soft Human Resources, Benefits Administration, Payroll for North America, and Pension Administration.

Effect 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:

- For reporting purposes, which of the employee's jobs is the primary job.

  You don't have to designate a primary job, but you may want to, to ensure accurate affirmative action statistics and other data that is required for government reporting.

- Whether the employee's jobs will share a benefits program or have separate benefits.

The system provides flexibility in mixing and matching jobs and benefits programs.

In other ways, PeopleSoft Human Resources treats an additional job the same way that it treats the employee's first job.

See Also

Adding Add Concurrent Jobs to Menu

PeopleSoft Human Resources PeopleBook: Track Global Assignments, "Starting New Assignments"

Effect of Multiple Jobs on Base Benefits

Some of the benefit-related issues regarding multiple concurrent jobs are:

- Which job is the employee's main, or primary, job?
- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- Which jobs are used for calculating deductions and contributions?
- How are 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 on a single job. This is called the *primary job* (not to be confused with the primary job for PeopleSoft Human Resources (HR) reporting purposes). The system also uses the primary job to associate payroll deductions for benefits with a specific job. Each benefit record number (group of jobs) that you designate for an employee has one job designated as the primary job.

When a person is hired into a position, the system flags that job as *primary* based on rules that you have set up. This flag is stored in the Primary Job table. As the employee is hired into other concurrent positions, the system turns this flag on or off based on the rules that you have established.

For example, here is what the Primary Job table would look like for the professor/dean/physician employee:

Job Title	*Employee Record*	*Benefit Record*	*Primary Job?*
Professor	0	0	Yes
Dean	1	0	No
Physician	2	1	Yes

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.

The designation of an employee's primary job is effective-dated and can be changed anytime from a data maintenance page. Also, because the action of starting a new, concurrent job or terminating an existing job usually 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 PeopleSoft Workflow for review.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up and Managing Multiple Jobs," Setting Default Multiple Jobs Options

Grouping Jobs to Determine Benefit Eligibility

When employees hold multiple concurrent jobs, they may be eligible for different offerings of benefits, based on 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 introduce the concept of a *benefit record number.* If an employee is eligible for multiple sets of benefits (or possibly multiple benefit programs), then you enroll the employee in those benefits according to the set of benefits that corresponds to a grouping of one or more jobs. The benefit record number is the mechanism that is used to group concurrent jobs for benefits eligibility and enrollment purposes.

When Multiple Jobs is activated, all enrollments for benefits are specific to a benefit record number.

Maximum Number of Concurrent Jobs

An employee can hold a maximum of 50 concurrent jobs across all benefit record numbers. PeopleSoft Payroll can process only 50 benefit record numbers on one paycheck.

Calculating Benefit Deductions

The same grouping method that is used to determine eligibility can be used to calculate deductions. You can group jobs to calculate a deduction that is based on the employee's salary. Typically this involves calculating coverage and related premiums for Life and Disability plans that are based on the employee's salary or compensation rate. You calculate the coverage and deduction based on:

- The salary of the primary job.
- The summed salaries from a group of jobs

When you designate the primary job for a benefit record, the system ties all deductions for the benefits that are associated with this benefit record to this job. Benefits deductions are taken only 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.

When jobs are combined into a single check for all benefits record numbers, the benefits deduction for the different benefit record numbers is printed as separate detail lines.

Applying Regulatory Contribution Limits

When applying regulatory limits to contributions for savings plans, the system takes into account all earnings and deductions that the employee has across multiple jobs, not just the job or jobs that are associated with the plan that is being limited.

The Retro Deduction and Imputed Income Adjustment processes reevaluate deductions over a specified period of time. Using the current state of the database (benefit and general deduction enrollments, job history and primary job assignment), the system recalculates deductions and compares them to the deductions that were originally calculated and taken.

In a multiple job environment, the primary job indicators play an important role in the calculation of deductions. 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 might calculate a different deduction amount for this period than it originally calculated. During Retro Deduction and Imputed Income Adjustment processing, the system drives the calculation off 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. Also, 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, this can 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 uses the entire gross earnings from the check, as opposed to just the gross earnings that are attributable to the jobs with the same benefit record number as the enrollment for the deduction that is being limited. This can result in different deduction amounts being calculated than were previously calculated.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up and Managing Multiple Jobs"

Effect of Multiple Jobs on PeopleSoft Benefits Administration

The major impact that multiple jobs have on PeopleSoft Benefits Administration is on benefit eligibility and event triggering. Considerations are:

- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- If a change affects one job, how do you determine the effect that 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 in a benefit program or option. Eligibility Rules comprise three major components:

- Eligibility Criteria
- Grouping Method
- Evaluation Method

Each component is tied to an Eligibility field within an Eligibility Rule. The Eligibility Criteria field defines the data values that determine eligibility or ineligibility. The employee's Primary Job indicator and Include for Eligibility checkboxes on the Primary Jobs table, together with the Grouping Method and Active Only fields, define which jobs should be evaluated. Finally, the Evaluation Method component 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 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 — Groups all jobs with the Include for Eligibility flag on Primary Jobs that are selected for all benefit record numbers.
- Flagged BR — Groups all jobs with the Include for Eligibility flag on Primary Jobs that are selected within the benefit record number of the event.
- Primary — Looks at only the primary job within the benefit record number of the event.

When determining which jobs should be grouped, the Active Only check box from the eligibility rule is also used. If this flag is ON, then only those jobs with an active Empl_Status (employee status) of A, L, P, W, or 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 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 (full-time equivalency) 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 the jobs. The FTE adds up to 1.0 across these jobs, so this employee meets the eligibility rule.

Suppose that the Grouping Method is All Flagged BR. Then the group of jobs we evaluate is Empl_Rcd (employee record) 0 and Empl_Rcd 1. The sum of these FTE fields is .75, which does not meet the eligibility criteria.

See Also

PeopleSoft Benefits Administration PeopleBook, "Defining Eligibility Rules," 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 loads deductions for benefits only if the primary job for the benefit record is being paid on the check that is being calculated. Likewise, when loading additional pay for benefits credits, the credits posted under any employee records number for a particular benefit record are loaded to the paysheet of the primary job only 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 it is, the system searches for the additional pay data, looking for benefits credit 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 inserted into the system manually on the BAS Activity page.
- Passive events.

If changes are made to an employee's Job data that impacts the employee's primary job designation, Include for Eligibility flag, or Include for Deduction flag, the system 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 when 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 creates an event for each benefit record that is held by the employee when it processes one of these triggers. This is also true for Passive Birthdate (PB) triggers that are generated as a result of processing Passive Events.

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 exploded trigger generates a new event that has the same event class as the original trigger.

Other expanded triggers are generated as a result of the 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 that generate other types of triggers won't affect other benefit records.

For example, suppose that you change the example employee (professor/dean/physician) 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 generates a (TJ) Job trigger in the BAS Activity Table. This trigger contains the employee record and the corresponding benefit record of the job that is changed. If any eligibility rule uses a Grouping Method of *All Flagged,* meaning that jobs from any benefit record can contribute eligibility information for

this benefit record, you need to expand these triggers. Carefully consider whether you want to activate this trigger explosion. It creates some overhead for the system to maintain and process. If you have eligibility rules that cross benefit record boundaries, then you should select Automatically Create Triggers for All Benefit Records for Job Triggers, Passive Service Triggers, and MultiJob Trigger on the Multiple Jobs Options page. If you have no such eligibility rules in your system, you can safely turn off the explosion for each trigger type.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up and Managing Multiple Jobs," Setting Default Multiple Jobs Options

Passive Events and Multiple Jobs

Service-based eligibility is based on the service date for the primary job. Because jobs outside of specific benefit records can be grouped, eligibility that is based on the service date can come from the primary job or from any other job in or outside a benefit record number. Therefore, the system creates a BAS Activity trigger for each job that it finds during Passive Event processing that meets the passive service evaluation. These are called PS triggers.

Marking Events for Reprocessing

The system can now better identify events that should be considered for reprocessing. Prior to this release, events were flagged for reprocessing consideration when 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 used for eligibility purposes, we eliminate the risk of not flagging an event that should be considered for reprocessing.

Effect of Multiple Jobs on PeopleSoft Payroll for North America

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 paysheet 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 paysheet for the employee's primary pay group. The paysheet includes all of the

employee's FLSA (Fair Labor Standards Act) 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 that are associated with the jobs can differ.

Deduction Limits

Limits for general deductions and benefit deductions can vary by job. PeopleSoft Payroll for North America 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 in the same organization, the system calculates the correct overtime for any extra hours worked.

See Also

PeopleSoft Payroll for North America PeopleBook

Effect of Multiple Jobs on PeopleSoft Pension Administration

PeopleSoft Pension Administration supports the use of multiple concurrent jobs, instead of relying on Employment Record number 0 for much of the information that is used in the pension benefit calculations.

Multiple Jobs and the Eligibility Process

The eligibility process always produces two primary results:

- Confirmation of whether an employee has ever been eligible for pension benefits.
- Time line showing the periods of eligibility and ineligibility.

For a single-job environment, producing these results is a 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. The system considers the employee to be eligible for a particular period if any of the jobs are eligible.

Multiple Jobs and the Primary Job Record

In a single-job environment, the system looks at only record number 0 when processing or resolving database aliases, and it ignores all other records. Record number 0 is the only primary job record that is allowable. This is not always useful for users of multiple concurrent

jobs because an employee's first job record is not always the best primary record. When you use multiple jobs for PeopleSoft Pension Administration, the system does not select Employment Record number 0 as the primary record. It examines all of an employee's records and selects a primary record by choosing the first record that it finds 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 these categories, it selects the lowest-numbered record in 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. 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 record of your own choosing as the primary record.

See Also

PeopleSoft Pension Administration PeopleBook, "Defining Plan Eligibility" and "Defining the Primary Job Record and Multiple Jobs Considerations"

Activating Multiple Jobs

Activate the Multiple Jobs feature when employees can have multiple, concurrent job assignments in your organization or anytime that you need to maintain different sets of records for the same employee. If you use this option, the system makes the Empl_Recd field available, when searching for data and opening various pages throughout PeopleSoft Human Resources, and displays the employment record information on the pages.

You activate Multiple Jobs by selecting Multiple Jobs Allowed on the PeopleTools Options page. Remember to reset PeopleSoft Application Server so that the system can pick up your change.

If you select the Multiple Jobs Allowed check box, you must add Add Concurrent Job as an option to the Use menu on the Administer Workforce menus. You complete this task using PeopleTools Object Security.

See Also

"Setting Up PeopleSoft HRMS," Setting Up HRMS Options on the PeopleTools Options Page

PeopleTools PeopleBook: Security, "Understanding PeopleSoft Security," Object Security

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information"

Changing Search Views for Base Benefits

In a multiple job environment, an employee might have more than one benefit record number with one or more jobs associated with the different benefit programs. When searching for employee data using standard search views, you may not know which record to look at. When Multiple Jobs is activated, the system uses alternate search views that link to the benefit record number rather than the employment record number.

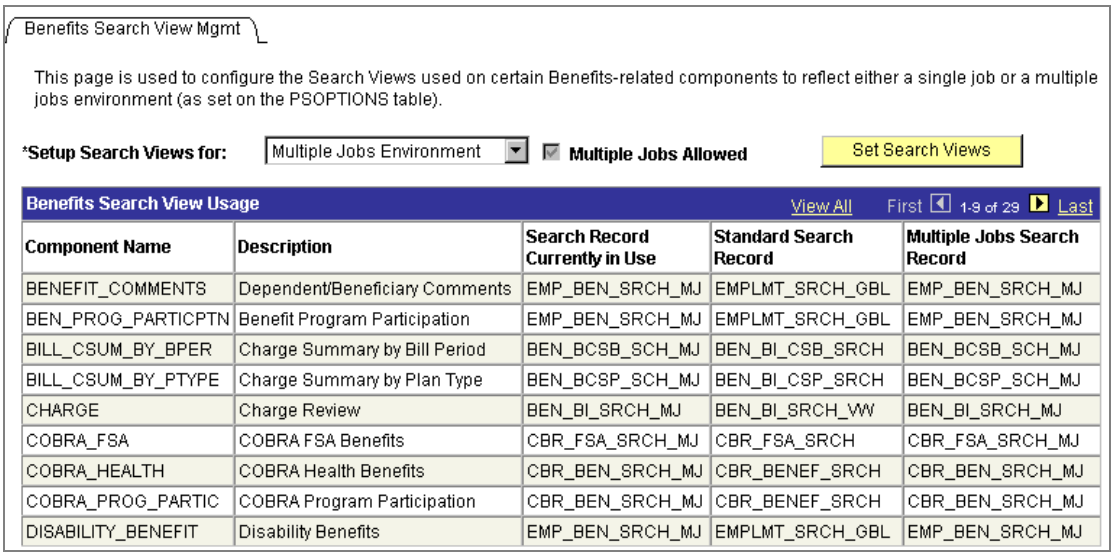
Operator Security does not change. No special consideration is given to the Primary Jobs in the search views. If any job in the benefit record passes the security criteria for the operator, then the benefit record is available for enrollment activity.

Page Used to Change Benefits Search Views

Page Name	*Object Name*	*Navigation*	*Usage*
Benefits Search View Mgmt (benefits search view management)	BN_SRCH_VW_MAP	Define Business Rules, Define Base Benefits, Setup, Benefits Search Vw Management, Benefits Search View Mgmt	Change benefits search views from a single job environment to a multiple job environment.

Changing Benefits Search Views

Access the Benefits Search View Mgmt page.



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

Setup Search Views for	Select the search view to use: ***Multiple Job Environment*** or ***Single Job Environment.***
Multiple Jobs Allowed	If selected, this indicates that Multiple Jobs Allowed was selected on the PeopleTools Options page.
Set Search Views	Click this button to update the **Benefits Search View Usage** grid. • If you selected ***Multiple Job Environment,*** the Multiple Job Search Record column is copied to the Search Record Currently in Use column. • If you selected ***Single Job Environment,*** the Standard Job Search Record column is copied to the Search Record Currently in Use column.
Benefits Search View Usage	Displays the components that must have the search view changed in order to accurately present multiple job employee data.
Component Name	Displays the component names.
Description	Describes the components.
Search Record Currently in Use	Lists the currently used search records.
Standard Search Record	Lists the search records that are used for a standard single-job environment.
Multiple Job Search Record	Lists the search records that are used for a multiple-job environment.

CHAPTER 21

Working With Groups

This chapter provides an overview of working with groups and tells you how to:

- Set up group definitions.
- Set up group security.
- Refine groups.
- Purge group results.
- Build applications or batch programs with Group Build functionality.

Understanding Group Build

The Group Build feature provides a standard way to create groups of employees and non-employees in PeopleSoft Human Resources. Once you've created a group, you can use it for a variety of purposes.

You might want to apply a business process to a group of individuals that crosses job, department, or even company lines. For example, you might want to offer a special bonus plan to your organization's research and development teams. The group includes everyone in departments 10200 though 10500. Using the Group Build feature, you can create a group consisting of departments 10200 through 10500 and administer the group's incentive plan using the Variable Compensation module. Later, someone else can administer salary increases to the same group using the Plan Salaries module. You define the group only once.

You can define groups with the Group Build component and use those groups in PeopleSoft Payroll for North America, Benefits Administration, Stock Administration, and any of the following PeopleSoft Human Resources modules:

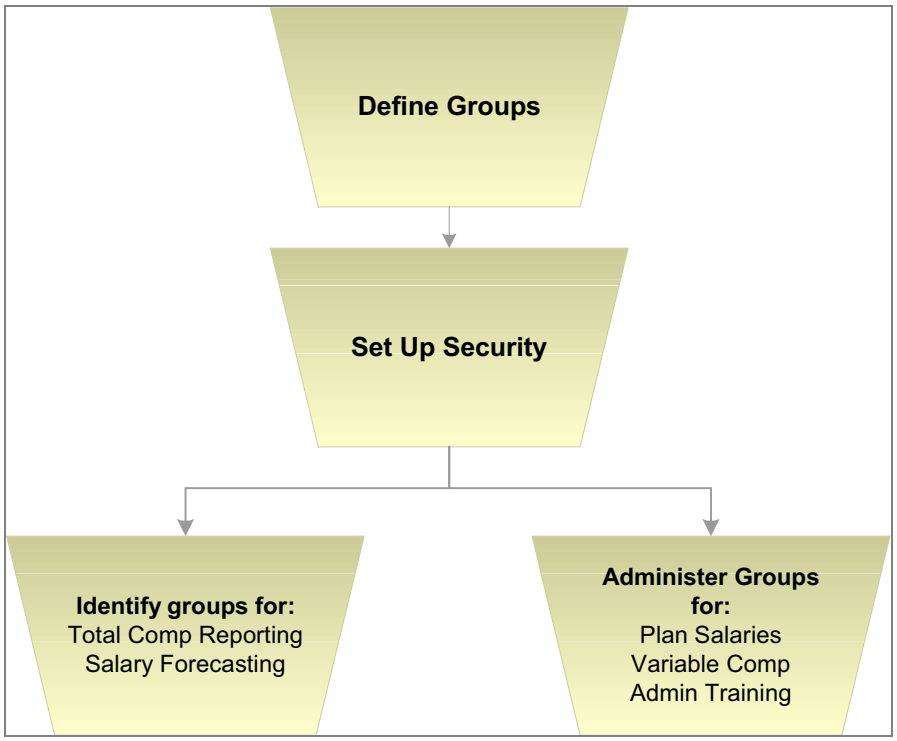
- Salary Planning
- Salary Forecasting for France *(La Masse Salariale)*
- Total Compensation Reporting
- Variable Compensation
- Employee Review
- Training Administration

Creating a Group

Creating a group in PeopleSoft Human Resources involves three steps:

1. Defining the population that belongs to the group.
2. Setting up group security.
3. Refining dates and other module-specific parameters in individual PeopleSoft modules (if necessary).

These steps are designed for experienced users who are familiar with the record and field structures in PeopleSoft Human Resources:



Creating a group

For example, suppose that you want to apply the same employee review to all employees in the following group:

- Job Code 1001 or 1002
- Department 10200
- Company CCB

Use Group Build pages to:

- Select the records, fields, and values that define the group.
- Set up the group's security.

Then set up the group's date parameters in the Planning Salaries module.

To use the same employee review group later in the Variable Compensation module, just link the existing group ID to a node in the Variable Compensation Group Tree in 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 PER_STATUS (personnel status) field.

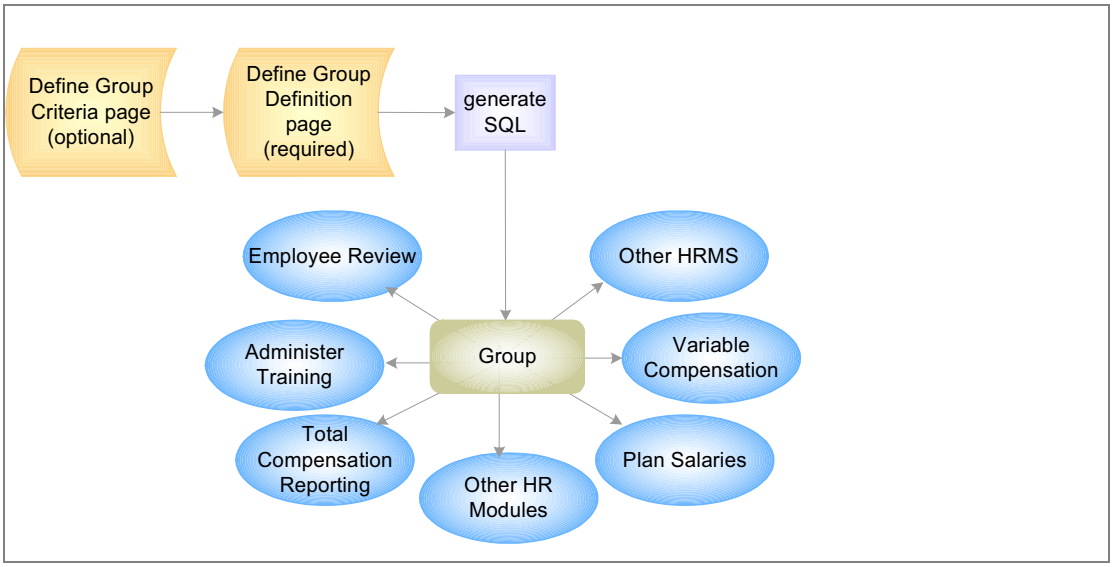
If you use the Monitoring Health and Safety module, your system may include some non-employees who do not have personal data records, but are tracked in a special record called NE_PERSONAL_DTA. These non-employees are not eligible for inclusion in groups.

Groups for Variable Compensation

Group build comes with a group ID of No Group that is required for Variable Compensation processing. The group ID NOGROUP is used for Variable Compensation plans without groups. It is a reserved group ID, and you cannot create a Group ID = "NOGROUP" in the Group Build module.

Setting Up Group Definitions

The first step in creating a group is to define its population.



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 repeatedly to create different groups. For example, if your organization operates several business processes based on employees' department and union memberships, you may want to create a group criteria ID called DEPT AND UNION CODE. Once you've created the group criteria ID, you can use it to define a variety of groups.

Record Name	*Field Name*
Job	Department
Job	Union Code

You can create a group criteria ID using any field from the following seven records:

- JOB
- JOB_JR
- COMPENSATION
- EMPLOYMENT
- PERSONAL_DATA
- PERS_DATA_EFFDT (effective-dated personal data)
- TL_EMPL_DATA (employee time profile from PeopleSoft Time and Labor)

Using PERSONAL_DATA

Application messaging updates the PERSONAL_DATA record with data from the PERSON record, but this update is not in real time, meaning that recent new hires may not be included in a group based on PERSONAL_DATA. Follow the appropriate instructions to ensure that recent new hires are included in your group.

If you have not already defined the group:

- Run the Refresh PS_PERSONAL_DATA table.
- Create the group definition and click the Launch Count button on the Group Definition page.

If you have already defined the group:

- Run the Refresh PS_PERSONAL_DATA table.
- Run the Group Results Purge process.
- Click Launch Count on the Group Definition page for that group.

2. (Optional) Attach a group criteria ID or query to the group definition on the Group Profile page.

   On the Group Profile page, you can use a group criteria ID and queries as part of a group's definition.

   - Using a group criteria ID

     If you use a group criteria ID, you can define additional records, fields, and field values on the Group Definition page. You can refine the group even further by attaching a query definition. However, you can use only one group criteria per group.

   - Using PeopleSoft Query

If you use PeopleSoft Query, you can choose an existing query or create a new one. Using queries provides access to a broader set of system records than the six records that are available through the Group Criteria page or Group Definition page. However, a query must follow certain rules to be used in a group definition. You can attach only one query to a group definition.

3. (Required) Define the group by selecting records, fields, and field values on the Group Definition page.

   If you included a group criteria ID in the group definition, you must use the Group Definition page to attach the appropriate field values to the fields and records in the Group Criteria. You can also add any other records, fields, and values that you want to include in the group's definition. If you've included a query in the group definition, you can't make any further selections on the Group Definition page.

   You can also define a group entirely on the Group Definition page, without attaching a group criteria or query.

See Also

Updating Personal Data

PeopleTools PeopleBook: Query

Pages Used to Define Group Criteria

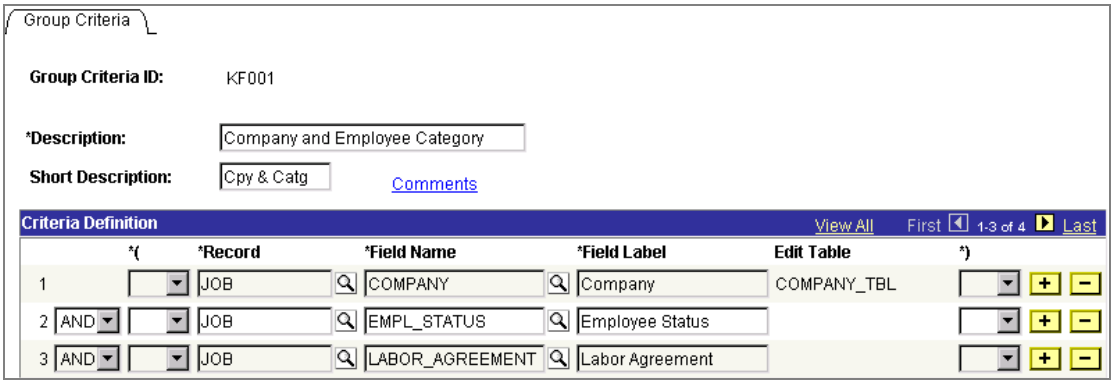
Page Name	*Object Name*	*Navigation*	*Usage*
Group Criteria Definition - Group Criteria	GB_GRP_CRIT1_TBL	Define Business Rules, Manage Human Resources (GBL), Setup, Group Criteria Definition, Group Criteria	Define the records and fields that you want to use to create a group criteria ID, which is a building block that you combine with other elements to build a more complex group.

Page Name	Object Name	Navigation	Usage
Comments	GB_GRP_DEF1_SEC	Click the Comments button on the Group Criteria Definition page.	Enter free-form comments about a Group Criteria definition.
Group Definition - Group Profile	GB_GRP_DEF1_TBL	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	Attach an existing group criteria ID and/or attach a query to a group definition. To attach a group criteria ID or query to the group definition, you must already have created the group definition.
Group Definition - Group Build Definition View	GB_GRP_DEF1_SEC	Click the Comments button on the Group Definition - Group Profile page.	View the records, fields, values, and operators that you've defined for the group.
Group Definition - Group Definition	GB_GRP_DEF2_TBL	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	Define the records, fields, and field values to associate with a group. 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 Definition - Group Profile page.

Page Name	Object Name	Navigation	Usage
Group Definition - Group Result	GB_GROUP_RES_SEC	Access from the Group Definition page.	View and sort the members of the groups that you've built on the Group Build pages.

Defining a Group Criteria

Access the Group Criteria Definition - Group Criteria page.



Group Criteria Definition - Group Criteria page

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 that you enter on this page. Values are ***AND*** (the default) and ***OR.***

(Create sets or subsets of linked records and field names. Using parentheses helps avoid ambiguity when you create several AND/OR conditions. You can create up to five nesting levels. The system displays a list of values. The default is ***none.***

Record Select the record name to include in the group criteria definition. The system displays a list of valid record names.

Field Name Enter the field name to include in the group criteria definition. The system displays a list of valid field names for the record that you selected in the **Record** field.

Note. If you enter a field name that is keyed to other fields, the system displays the other fields that you must enter to finish defining the field. For example, to build a group that is 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 press TAB to move out of **Field Name**. You can change the entry.

Edit Table

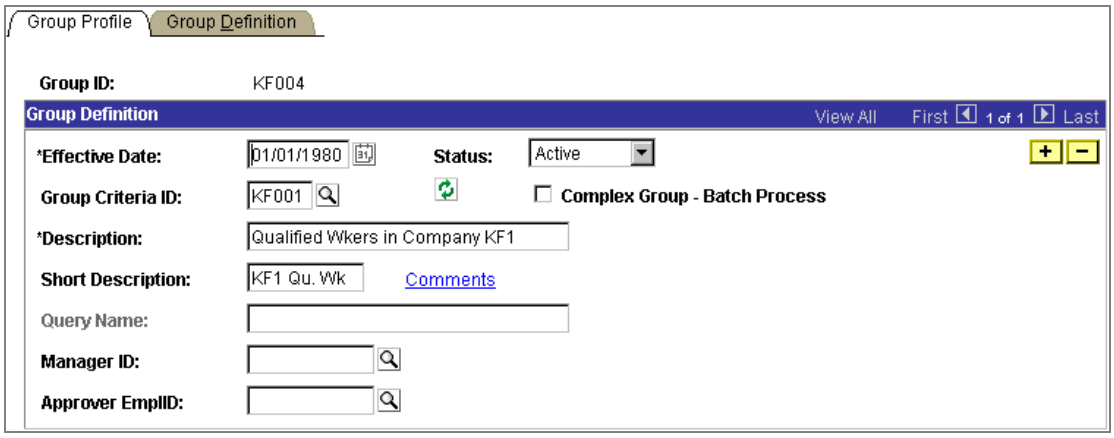
The system uses edit tables to validate the data that you enter in certain fields. If the field name you entered is linked to an edit table, the system fills in this field when you press TAB to move out of **Field Name.**

)

Complete a nesting statement that links multiple records and fields together. The system displays a list of values.

Attaching a Group Criteria ID to the Group Definition

Access the Group Definition - Group Profile page.



Group Definition - Group Profile page

Group Criteria ID

To include an existing group criteria in this group definition, enter the ID here. Otherwise, leave the field blank. You can include only one Group Criteria ID in a group.



If you changed the Group Criteria ID, click the **Refresh** button to repopulate the Group Definition page with new values.

Complex Group - Batch Process

Select if you want to select batch processing for complex groups that take a long time to build online. Batch processing can take place at off-peak times when you don't need your system for other purposes.

PeopleSoft Process Scheduler handles batch processes, so be sure that your process scheduler is up when you select this check box. Process Scheduler notifies you when processing is complete. If you need a status on scheduled group execution, see the Group Definition - Group Results page.

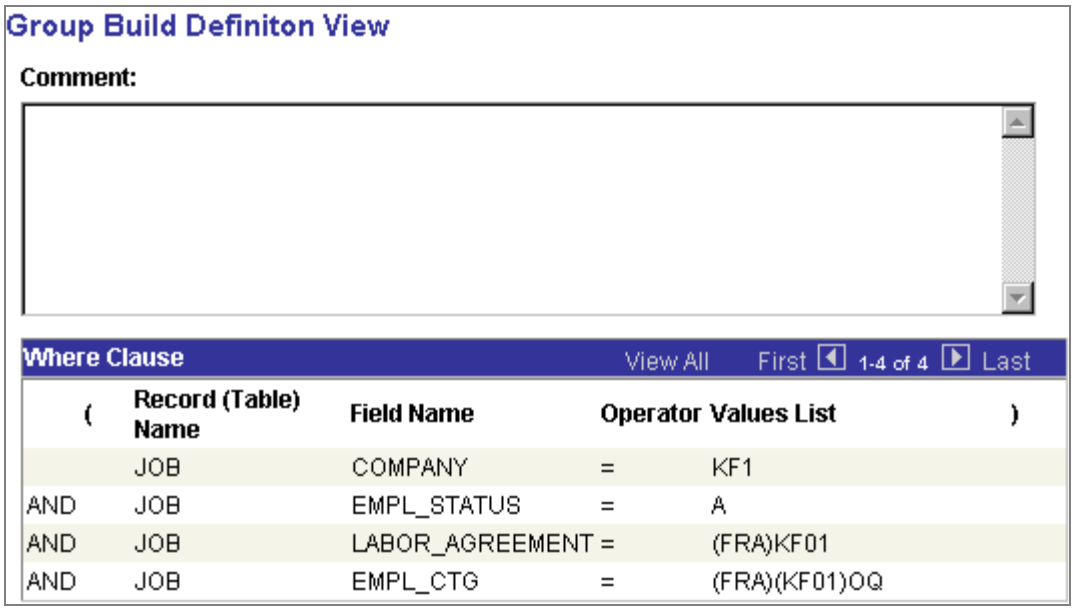
Comments	Click this link to enter free-form comments on the Group Definition - Group Build Definition View page. Below the **Comments** area, the system displays the records, field names, operators, and values that you have defined for this group.
Query Name	To include an existing query in this group definition, enter the query ID here. Otherwise, leave the field blank. ***Warning!*** When you open the drop-down list in this field, all existing queries appear. However, the Group Build process works only with queries that produce a group that is keyed by employee ID. Some 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.
Manager ID	Designate the group's manager, if applicable. For example, if the group you're defining consists of all employees in department 10200, enter the department manager's ID here. You can also use this field to designate the leader of a project team. Variable Compensation uses the group manager ID to determine who can access the Award Allocation page when a plan is managed with groups.
Approver EmplID (approver employee ID)	If you're planning to use this group in the Variable Compensation Administration by Groups module, enter the employee ID of the person who approves awards for this group. The system displays a list of values.

See Also

PeopleTools PeopleBook: Query

Viewing Records, Fields, Values, and Operators for a Group

Access the Group Definition - Group Build Definition View page.



Group Definition - Group Build Definition View page

Where Clause Enter a where clause (optional). See the field descriptions on the Group Criteria page.

Using Queries to Refine Groups

Using PeopleSoft Query to refine a group in the Group Build component has two advantages:

- You can access many more tables than the seven tables that are available in the Group Build component.

Defining Queries for Group Definitions

When you define a query to use in group definitions, the following rules apply:

- You must insert a special Group Build view into the query.

  The system uses this view, GB_QRY_LINK_VW, to merge SQL statements that are created in the Group Build pages with the SQL statements that are created by PeopleSoft Query.

- A record that you add in PeopleSoft Query must have at least one criterion.
- You can’t define fields that are returned by the SQL statement.
- You can’t use unions.
- You can't use aggregates.
- You can’t use Tree Option as an expression.
- You can’t use a prompt as an expression.

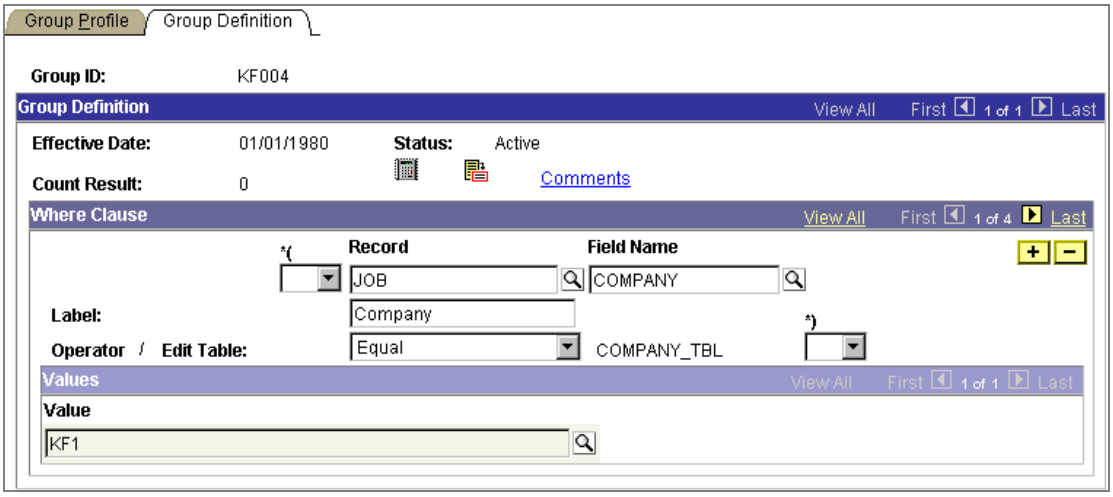
You can use only Field Name, Expression, Constant, In List, Current Date, and Effective Seq (effective sequence).

See Also

Building Applications or Batch Programs That Include Group Build Functions

Defining Records, Fields, and Field Values for a Group

Access the Group Definition - Group Definition page.



Group Definition - Group Definition page

This page is the only page that you must complete to build a group. You can use this page in combination with the Group Criteria Definition - Group Criteria page and the Group Definition - Group Profile page or you can build a group entirely on this page. You can use this page in any of the following ways:

- If you entered a Group Criteria ID on the Group Profile page.

  The system populates the Group Definition page with the record and field names from the Group Criteria page. You can't change the record and field names on this page. The system displays the **Imported from Group Criteria** check box when the fields are imported from the group criteria. To finish defining the group, complete the parameters by entering the appropriate field values for each field name in the Criteria Definition group box on the Group Criteria page. You can add more records, field names, and field values to the definition.

- If you entered a query on the Group Profile page.

  You can't refine a group that is based on a query.

- If you aren't using a Group Criteria ID or a query.

  Define the group entirely on this page. Enter all the records, field names, and field values that you'll use to build the group.



After you save the page, click the **Launch Count** button to compute how many members are in the group. If you selected the **Complex Group - Batch Process** check box on the Group Definition - Group Profile page, clicking **Count** sends the group to PeopleSoft Process Scheduler to be generated.

If this is a complex group that you have already generated, clicking **Count** retrieves the number of rows in the group.

Count Result

When you click the **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 Definition - 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 Definition - Group Build Definition View page.

Record

Enter the name of the record that you want to use to define the group. The system displays a list of valid record names. If this field is populated by a Group Criteria definition from the Group Definition - Group Profile page, you can't change the entry. If the record that you select is effective-dated, when you move out of the field, the system asks whether to build the group based on the current information or on all the history data.

Field Name

Enter the name of a field to use to define the group. The system displays a list of values for the record that you entered in the **Record** field. If you entered a group criteria ID on the Group Definition - Group Profile page, the system populates this field, and you can't change the entry.

Label

The system populates this field when you move out of the field. If you entered an effective-dated record and chose to build the group based on the current information, the system selects the most current record.

Operator

Define the field values to include in or exclude from the group. See the following Valid Operators table.

JPN) Note. If you define groups for use in Japanese processes such as Seniority Pay or Salary Increase, we recommend that you do not set the Operator for Job – Effective Date to ***Current.*** If you select ***Current,*** you may not get the results you want when you run processes that are backdated. Provided Effective Date is not set to ***Current*** here, you can run processes to extract other than current data by using the As of Date on the process page.

Edit Table The system uses edit tables to validate the data that you entered in certain fields. If the **Field Name** that you entered is linked to an edit table, the system populates this field.

Note. If the **Field Name** that you entered is keyed to other fields, the system displays the other fields that you must enter to finish defining the field. For example, if you want to build a group based on a particular Salary Step, you must also specify the SetID, Salary Plan and Salary Grade.

Value Select a field value from the list.

Valid Operators

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	Field value equals 0.
Like	
Max	Maximum.
Min	Minimum.
Not Btw	Not between.
Not Equal	
Not In	Not In List
Not Like	
Not Null	Field value does not equal 0.

Defining Groups With Effective-Dated Data

Several records that you use to define a group are effective-dated:

- Job
- Effective-Dated Personal Data
- Time and Labor Employment Data
- Compensation

The system stores both current and historical data for these records, so you can build groups with them in two ways:

- Using current data.

  For example, selecting only an employee's current job and leaving out the previous jobs. The system adds the condition *Current* to the record's effective date.

- Using history data.

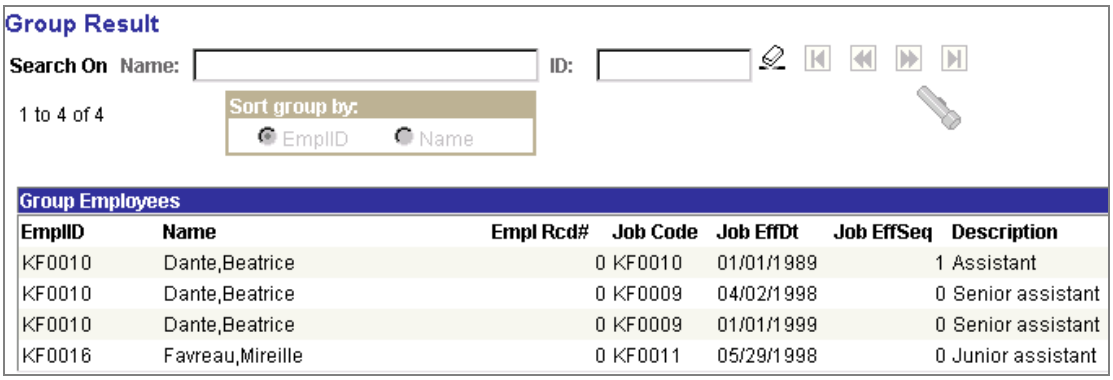
  For example, including all the jobs that the employee has held in your organization. The group can include multiple rows of data for one employee. If you don't place any conditions on the effective date when you define the group, the system pulls all the historical data as of the current system date.

If you create a group definition that includes two effective-dated records, you can link the two records by effective date. The following table shows how to link two effective-dated fields.

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.

Viewing and Sorting Group Members

Access the Group Definition - Group Result 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 manage the display of chunks using filters and navigator buttons.

Filters enable you to enter search criteria for identifying a chunk of members. You can enter information into one or more of the filter fields to narrow your search.

Important! Group Build automatically joins the JOB, COMPENSATION, and EMPLOYMENT tables. To compare the group results from this page with the results of a query that you launched from your SQL editor, add the joins to those three records in your SQL editor to ensure that the results are comparable.

When you click the count button, Group Build Definition gives the system date as parameter. For example, the Group Build Definition adds the condition JOB.EFFDT <= Given Date is added in the generated SQL, even if you did not define any dates criteria in the Group Build Definition.

Use the following filters and navigator buttons to move from one chunk of members to another:

Search on Name — Enter one or more letters in this filter field to instruct the system to populate the page with employees whose last names begin with the letters that you entered.

You can use the wild card *%* to help select a record. For example, to search for all employees named John enter ***%John.***

ID (employee ID) — Entering one or more numbers in this filter field instructs the system to populate the page with employees whose employee IDs begin with the numbers that you entered.

Sort Group by — Select whether you want the members to appear in order by **EmplID** (employee ID) or **Name.**



Click the **Search** button to display the results of a new search. The field to the left of the **Search** button shows which rows are visible compared to the total number of rows. For example, ***1 to 4 of 4*** means that rows 1 through 4 are displayed out of a total of 4 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 departmental security. Group security overrides departmental security. For example, a user who does not normally have access to department 10100, but who has access to a group that includes department 10100, can see all group members, even those who belong to that department. This makes security factors an important consideration when you set up groups.

This section describes how to:

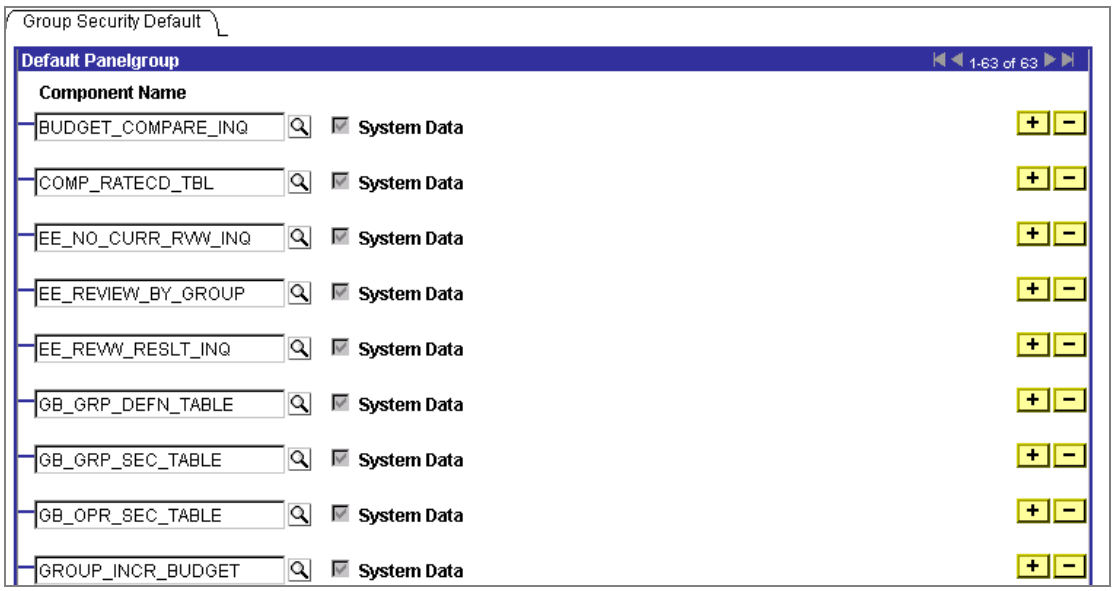
- Set up default component access.
- Set up security by group.
- Set up security by operator.
- Translate your company and department structure into group format.

Pages Used to Set Up Group Security

Page Name	*Object Name*	*Navigation*	*Usage*
Group Security Default	GB_GROUP_DFT_TBL	Define Business Rules, Manage Human Resources (GBL), Setup, Group Security Default, Group Security Default	Manage group access to pages in your system. Specify which components in your system can use or refer to groups that are created in the Group Build component.
Security By Group	GB_GRP_SEC_TBL	Define Business Rules, Manage Human Resources (GBL), Setup, Security by Group, Security By Group	Control security access to a group and to components that are used by the group.
Security By Operator	GB_OPR_SEC_TBL	Define Business Rules, Manage Human Resources (GBL), Setup, Security by User, Security By Operator	Control an operator's security access to various groups and components.
Group Build From Co. Dept (group build from company and department)	RUNCTL_GBP003	Define Business Rules, Manage Human Resources (GBL), Process, Group Build From Co And Dept, Group Build From Co. Dept.	Translate your existing company and department structure into group format.

Setting Up Default Component Access

Access the Group Security Default page.



Group Security Default page

Component Name

The system populates these fields with a list of the standard PeopleSoft Human Resources components that refer to groups. This can occur in one of two ways:

The page contains a field that prompts the user to supply a group ID.

The page displays a list of people who belong to a particular group.

When you define group security for a particular group or operator, you can import this default list into the Security By Group and Security By Operator pages. Then you can selectively delete components to make them unavailable to that group or operator.

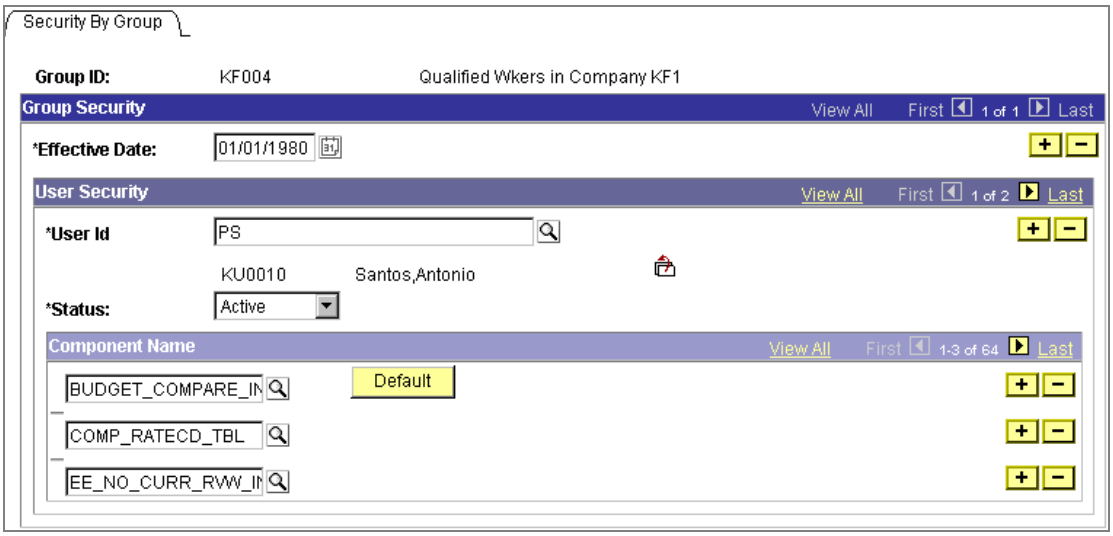
To keep a particular component from appearing on the Security By Group or Security By Operator page, delete its name from the list.

System Data

Select to specify whether a component is a standard component that is delivered by PeopleSoft as system data or a modified component that is created for your installation. This check box is selected if the system supplies the data and cleared if the component is modified. You can't change this field.

Setting Up Security By Group

Access the Security by Group page.



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 to grant security access as of a different date.

User ID Enter the ID of a user 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 the **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 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 (employee ID) blank and clicking the drop-down arrow. The system displays a Valid Values page that you can use to search for the employee ID you want.

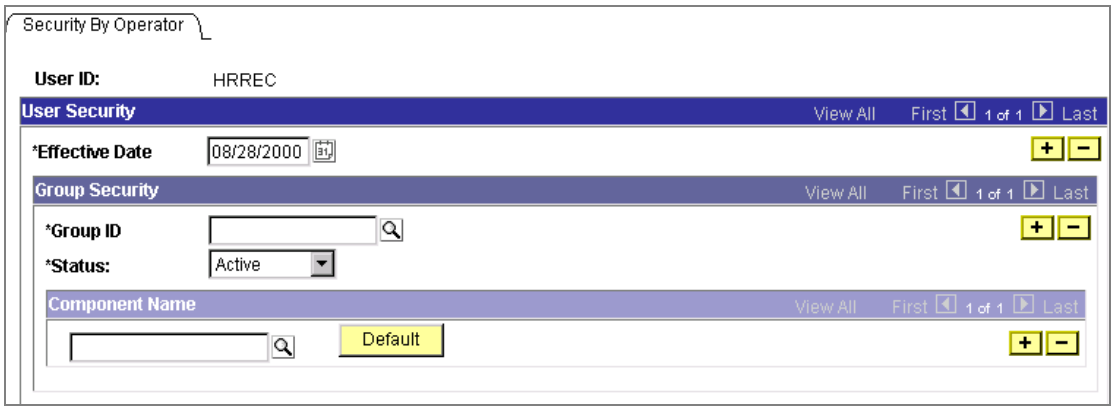
Status Select ***Active*** to grant the operator access to the group or ***Inactive*** to remove the operator's access.

Component Name Enter the name of the component that you want to include in the operator's security status. The status that you assign to the operator will apply to that 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 that listed on the Group Security Default page. The system displays the components you've selected.

Setting Up Security By Operator

Access the Security By Operator page.



Security By Operator page

User ID The user ID of the operator whose security access you set on this page. You can't change this field.

Effective Date The date that the security configuration takes effect. The default is today's date. To grant security access as of a different date, change the date.

Group ID Enter the ID of the group to which you want to control this operator's access.

Status Select ***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 that you entered in the **Group ID** field.

Default Click to assign the operator's security access for the group that you entered in the **Group ID** field to all components listed on the Group Security Default page. The system displays the components you've selected.

Translating Company and Department Structure Into Group Format

Access the Group Build From Co. Dept page.



Group Build From Co. Dept page

If your organization has a departmental security structure, creating a parallel structure for groups could involve redoing a great deal of existing work. To minimize duplication of effort, PeopleSoft provides an automated process for translating your departmental structure into group format. On this page, you create new groups that correspond to your existing company, setID, and department structure. For example:

- Department 10100 in SetID USA becomes Group USA 10100.
- Department 10200 in SetID USA becomes Group USA 10200.
- Company CCB becomes Group CCB.

Any user who has access to the departments has access to the new groups. For example, a user who has access to department 10200 in SetID USA has access to the new Group USA 10200.

See Also

PeopleTools PeopleBook: Process Scheduler

Refining Groups in PeopleSoft Modules

The refinement of group members takes place at the module level. You can define a group as of:

- A point in time.
- A period of time.

See Also

Building Applications or Batch Programs That Include Group Build Functions

Viewing Group Results

When you define a group through the Group Definition component, you don't specify any time limits on group membership, so some groups may have very long lists of members. To help manage these potentially unwieldy groups, PeopleSoft provides several pages and reports that 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 PeopleSoft Process Scheduler.

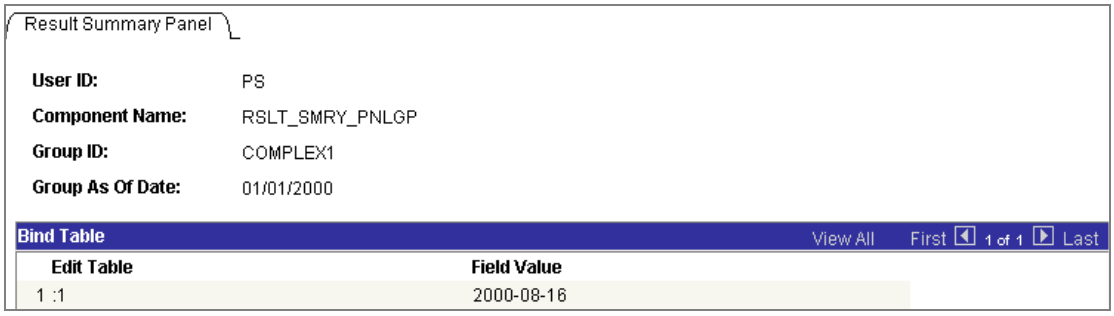
- Run the Group Membership report to view the members of a particular group.
- Run the Group Member Overlap report to see which individuals belong to multiple groups.

Page Used to View Complex Group Results

Page Name	*Object Name*	*Navigation*	*Usage*
Complex Group Results Summary Panel	RSLT_SMRY_PNL	Define Business Rules, Manage Human Resources (GBL), Inquire, Complex Group Results Summary, Result Summary Panel	View the status of the complex groups that you created in the Group Definition component. You must already have run the batch process to create the group.

Viewing Complex Group Results

Access the Result Summary Panel.



Results Summary Panel

You can designate any group as a complex group by selecting the **Complex Group - Batch Process** check box on the Group Definition - Group Profile page. The system creates complex groups by batch process and notifies you when processing is complete.

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 that is valid as of this date. The report lists the members who belong to the group as of the current date.

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.

This section describes how to:

- Work with versions of a group (for developers).
- Purge usable results.
- Purge unusable results.

Group Versions

Each time you build a group, the system generates a version number and stores it in the Group Result Table. The system creates a new version number and updates the result table if any of the following have changed since the last time you executed the group:

- The group definition.
- The query definition.
- Any parameters that you used to generate the group; for example, if you used effective-dated job data.

Working With Versions (for Developers)

Note. Before reading this section, see Building Applications or Batch Programs That Include Group Build Functions.

You can implement Group Build in an application by:

- Using the default developer query

  The default developer query works with the default Group Result Table.

- Creating your own query

  If you use your own query, you can define more parameters and/or more fields in a "personal" Group Results Table.

However, you can use your own Group Results Table with the default developer query or use the default Group Results Table with your own query, as long as the fields selected by the query match the default Group Results Table structure.

This means that the system regenerates the group and changes the version number if either of the following changed since the last time you executed this group:

- The query definition that was added by the developer.

- The Group Results Table.

Note. You can bypass the versioning mechanism by calling GB_EXEC("Y"). Then the group is generated each time it is called.

Note. When using Developer Query or User Query, keep in mind that GB_QRY_LINK_VIEW is based on the JOB record. When Group Build generates the SQL, the system replaces all references to GB_QRY_LINK_VIEW with JOB. If, after this is done, the left REC.FIELD is the same as the right REC.FIELD, Group Build will not process the line in the SQL generation.

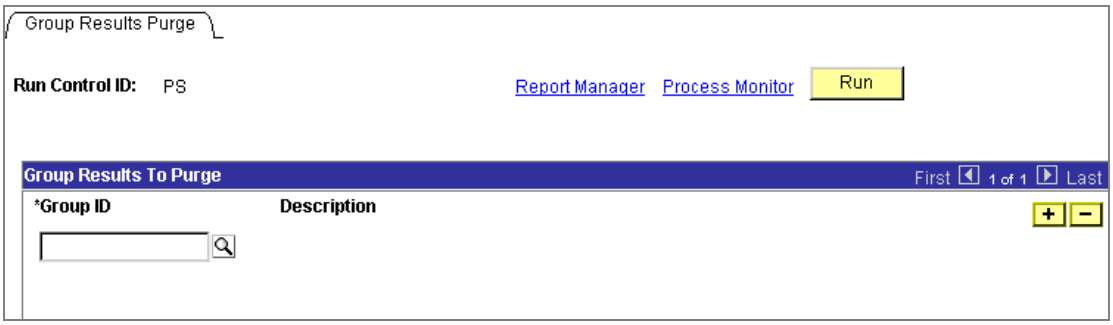
For example, if you have the criteria GB_QRY_LINK_VIEW.EFFDT <= JOB.EFFDT in Query, Group Build will replace it with JOB.EFFDT <= JOB.EFFDT. The system will then remove the line because the left REC.FIELD is the same as the right REC.FIELD. As a result, the Query count may differ from the one returned by Group Build.

Pages Used to Purge Results

Page Name	*Object Name*	*Navigation*	*Usage*
Group Results Purge	RUNCTL_GBP004	Define Business Rules, Manage Human Resources (GBL), Process, Group Results Purge, Group Results Purge	Delete (purge) the results of a previous version of a group from the Group Results Table.
Unusable Group Results Purge	RUNCTL_GBP005	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	Delete the results from all of your groups from the Group Result Table. You must have saved the group you want to purge before using this page.

Purging Usable Results

Access the Group Results Purge page.



Group Results Purge page

The Group Results Purge process deletes *usable groups*—groups with results in the Group Results Table that are still in sync with the current Group Definition and can potentially be retrieved by the system.

Group ID Enter the ID of a group whose results you want to purge. The system deletes the results from the Group Build results table GB_GRP_RES_TBL.

See Also

Building Applications or Batch Programs That Include Group Build Functions

PeopleTools PeopleBook: Process Scheduler

Purging Unusable Results

Access the Unusable Group Results Purge page.



Unusable Group Results Purge page

The Unusable Group Results Purge process deals with *unusable groups*—groups that were generated when the group definition was different from what it is now, and the results that are stored on the Group Results Table no longer match the group definition. Group results become unusable when any of the following items change:

- The developer's query definition.
- The Group Results Table, where the group results are stored.
- The group definition.
- The user's query definition.

See Also

PeopleTools PeopleBook: Process Scheduler

Building Applications or Batch Programs That Include Group Build Functions

This section provides 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. It details the way to call the groups' execution from an online application and from PeopleSoft Application Engine using the delivered Group Build application interfaces (APIs).

This section describes how to:

- Implement PeopleCode API calls.
- Implement PeopleSoft Application Engine API calls.
- Develop client-specific workflow.

Implementing PeopleCode API Calls

This section describes what a developer must do to use Group Build in the module that he or she is building. (We refer to this module as the client module.)

Note. Please read this entire section before performing any steps.

To Implement PeopleCode API calls:

1. (Optional) Set up a Group Build results table.

   Group Build provides a standard Group Results Table called GB_GRP_RES_TBL. This table contains the results of the groups that you build; its content is managed entirely by the Group Build module. This table provides a central place for storing Group Build results, so the results can be shared by all applications that use Group Build. *Do not add, delete or modify rows in this table*.

   If you want a table for your 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 the Group Build module.

   There are two ways to set up your own table:

   a. Log on to PeopleSoft Application Designer and clone the record GB_GRP_RES_TBL into MyClientModuleResultTable.

      This record becomes your client module result table.

b. Create a new record (MyClientModuleResultTable) into which you insert (at least) the subrecord GB_GRP_RES_SBR (the minimal structure for a modified result table). The modified results table can contain more fields than the one that is defined in the subrecord. However, you can't use the standard query «GB_DEFAULT_QUERY». You must create your modified developer query in which the additional fields appear in the «field tab».

For example, if your result table is defined as DEPTID, define your modified query as follows:

- All fields from GB_QRY_LINK_VW.
- All of your additional fields.

2. (Optional) Add two fields on the client module record to store the group ID and group as of date.

In PeopleSoft Application Designer, add two fields to the client module record (MyClientModuleRecord):

- The field GB_GROUP_ID for storing the Group ID.

  This field should prompt on GB_GROUP_TBL.

- The field MyAsOfDate for storing the as of date of the group.

If you choose not to record this information, you can use a derived/work record (see step 3) or system variables (such as system date).

3. In PeopleSoft Application Designer, create a derived/work record to store your group generation button.

a. Create a new record (DERIVED_MyClientModule) or use an existing derived record.

b. Create a new field: MyClientModule_GEN_BTN.

c. To the DERIVED_MyClientModule record, add a new field: MyClientModule_GEN_BTN.

4. In Peoplesoft Application Designer, Include the work page GB_API_WRK in the client module component.

a. Open the component (MyClientModuleComponent) that contains the page (MyClientModulePage) from which you'll call the Group Build API.

b. Insert the page named GB_API_WRK (the Group Build work page) into MyClientModuleComponent and mark it as hidden.

5. (Optional) Using PeopleSoft Query, define the query that you might want to add to for refining your group - developer query definition.

Insert the view GB_QRY_LINK_VW (required).

c. Insert the record(s) that are needed for joins and criteria.

d. Write your query according to the Group Build limitations; see "Group Build Query Limitations for Developers" later in this section.

e. Add all necessary prompts on the criteria tab.

Prompt values are bound using the GB_BIND API call.

Verify that your query is PUBLIC.

f. Save your query as MyDeveloperQueryName.

6. Add modified fields on the client module page.

g. Add the MyClientModuleRecord.GB_GROUP_ID field to MyClientModulePage.

h. Add the MyClientModuleRecord. MyAsOfDate field to MyClientModulePage.

i. Add the DERIVED_MyClientModule.MyClientModule_GEN_BTN group generation button to MyClientModulePage.

7. Add PeopleCode to implement calls to Group Build API.

Warning! All calls to Group Build API must be done from level 0 of your client module page.

Make calls to Group Build API in the FieldChange PeopleCode event.

Set the PeopleCode Event Properties to Application Server.

Select Application Server on the PeopleCode Event Properties page.

See "PeopleCode API Functions."

PeopleCode API Functions

Note. This list is a funclib (DERIVED_HR_GB.GB_API FieldFormula) for PeopleCode.

- 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 which API group, query name for refinement, and 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. The default query name is GB_DEFAULT_QUERY (view PS_GB_QRY_LINK_VW).

  - The parameter result_table_name is needed if the results table has been modified. It is optional. The default result table is PS_GB_GRP_RES_TBL. The result_table_name has to be complete; for example, « PS_MY_RESULT_TABLE ».

- Binding values.

```
&ret_bool = GB_BIND(prompt_code, value)
```

  - Enables you to bind values if prompts have been defined in the modified query developer. If you're using the standard query GB_DEFAULT_QUERY, then the only value to be bound is the refinement date: use the delivered API, GB_BIND_DATE.

  - The parameter prompt_code must be defined as a prompt in the developer query.

  - The parameter value is required.

- Binding a date as refinement when you're using the standard query.

```
&ret_bool = GB_BIND_DATE(value)
```

  - Use this function when you use the standard query GB_DEFAULT_QUERY. It enables you to bind a date (value) as a refinement.

  - The parameter value is optional and specifies a refinement date. The default is %date.

- Generating and executing the SQL statement.

```
&group_version_number = GB_EXEC(refresh_flag)
```

  - This API generates and executes the SQL statement.

  - It returns the version number of the generated group

  - If the parameter refresh_flag is set to *Y,* the SQL statement is generated each time you call the function. If the refresh_flag is set to *N,* the function checks to see if a generated group exists and returns its version number. If the group doesn't exist, the parameter generates it. The refresh_flag is required.

- Deleting the content of the result table.

```
GB_DELETE()
```

- Disabling/enabling the generic workflow and the specific workflow.

```
GB_SET_JOB_WF(job_name)
```

  - Disables/enables the generic workflow and the specific workflow according to job_name value. Specifies the job (job_name) to be scheduled in place of the default job name (used for generic workflow), if specified.

  - The parameter job_name is optional.

- If the job_name is specified, then the job that is named job_name must be defined in PeopleSoft Process Scheduler, as described in the workflow section.
- Providing a non-null job_name enables the corresponding workflow. Generic workflow is disabled.
- Providing a null job_name as parameter enables the generic workflow (workflow by default).
- On FieldChange PeopleCode event of DERIVED_MyClientModule.MyClientModule_GEN_BTN, add the following code according to one of the two scenarios described below.

Scenario 1

If you implement Group Build calls using the standard Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;



/* Use this instruction if you plan to use GB_GRP_RES_TBL */

GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord.MyAsOfDate,
« », « ») ;



/* Bind all parameters for the default Query : The Effdt of JOB */

GB_BIND_DATE(Any Date ) ;



/* Execute the SQL and fill the group result table */

&MyVersion = GB_EXEC ( « Y » ) ; /* <Y> Forces to rebuild the group even if one
is available */



* The list of employees for the group is now available for your own usage */

/* The code presented above populates the Group Result table GB_GRP_RES_TBL */

/* You can now use this record to populate your scrolls or can be used as a
join for a SQL Statement */



/* ADD YOUR CODE HERE  */
```

```
/* Clear the group result table only in the case you know the group will not
be used anymore*/

[GB_DELETE() ;]
```

Scenario 2

If you implement Group Build calls using your own modified Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;



/* Give your result table name to GB_DECLARE  (STEP 1 must have been
previously performed) and your Query Name if  you created one */

GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord.
MyAsOfDate, « MyDeveloperQueryName », «MyClientModuleResultTable ») ;



/* Bind all parameters for MyDeveloperQueryName */

/* Each prompt in MyDeveloperQueryName must be binded */

GB_BIND (« :1 », MyClientModuleRecord.MyField1) ;

[…]

GB_BIND (« :n », MyClientModuleRecord.MyFieldn) ;

/* Or use local variable for binding */

GB_BIND(« :n », &MyLocalVarn) ;



/* Execute the SQL and fill the group result table */

&MyVersion = GB_EXEC ( « N » ) ; /* <N> Don't rebuild the group if it is
available */



/* Employee group is now available for your module */

/* This populates the group result table MyClientModuleResultTable  */

/* You can now use this record to populate your scrolls or work on this table…
*/
```

```
/* ADD YOUR CODE HERE  */


/* Clear the group result table only in the case you know the group will not
be used anymore*/

[GB_DELETE() ;]
```

8. Implement PeopleSoft Security to see 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. The fields must be display-only and hidden.

Group Build Query Limitations for Developers

Following are some limitations to the standard use of PeopleTools Query:

- Developer queries need to be defined as PUBLIC queries.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You must include the view GB_QRY_LINK_VW in the query.
- Records that you add in QUERY must have at least one criterion.
- Prompts can be used as expressions to bind variables.

Implementing PeopleSoft Application Engine API Calls

This section describes what a developer has to do to use Group Build in the module that he or she is building, using PeopleSoft Application Engine. (We refer to this module as the client module.)

To implement PeopleSoft Application Engine API calls:

1. In PeopleSoft Application Designer, create a Run Control page.
2. Create a new Run Control record or use an existing one.

   In this record, add:

   - The parameters GB_GROUP_ID, GB_EFFDT, and GB_REFINE_DATE.

- The field VERSIONGBQDM.

3. In PeopleSoft Application Engine, create a new program .

   This program must contain:

   - A retrieval of parameters.

```
Step01.SQL:

%Select(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT,
AE_GBP002_AET.GB_REFINE_DATE)  SELECT GB_GROUP_ID  , GB_EFFDT  ,
GB_REFINE_DATE  FROM PS_RUN_CNTL_HR  WHERE OPRID = %Bind(OPRID)  AND
RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

   - A call to Group Build PeopleCode API.

```
Step02.PeopleCode:

Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_RESET PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_BIND_DATE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_SET_PANELGROUP PeopleCode DERIVED_HR_GB.GB_API
FieldFormula;



GB_SET_PANELGROUP("APPENGINE");  /* This is due to a tools issue and will
disappear as soon as the TPRD is closed */

GB_RESET();

&RET = GB_DECLARE(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, "", "");

&RET = GB_BIND_DATE(AE_GBP002_AET.GB_REFINE_DATE);

AE_GB_API_AET.REFRESH_SW.Value = "N";   /* You can see that the REFRESH_FLAG is
set to “N”  Equivalent to GB_EXEC(“N”). As we can’t call a section with direct
parameters, we must use the cache record of the AE API to perform this
operation */
```

   - A call to Group Build AE API GB_EXEC.

```
Step02.Call Section:

Call the section GB_API.GB_EXEC. You must not call GB_EXEC_LIB.GB_EXEC
Directly. You will always use the GB_API AppEngine Lib.
```

   - Version number of the group.

```
Step01.SQL:
```

```
UPDATE PS_RUN_CNTL_HR  SET VERSIONGBQDM = %Bind(AE_GB_API_AET.VERSIONGBQDM)
WHERE OPRID = %Bind(OPRID)  AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

Note. Perform your own Application Engine processing using this group.

4. Create reports, based on the group that you just created, by setting up a JOB.

   When the system launches the SQR, you get the GB_GROUP_ID VERSIONGBQDM (version of the group) from the Run Control record. This enables you to retrieve the group from the Group Results Table and print or perform processing on it.

Differences Between PeopleCode and Application Engine APIs

Question	*Answer*
What are the differences between a PeopleCode API and a PeopleSoft Application Engine API?	For building a group, there are not many differences between the two APIs. • In both APIs, you use the PeopleCode function GB_DECLARE, GB_BIND, or GB_BIND_DATE. • In the PeopleCode API, you call GB_EXEC("Y") with a REFRESH_FLAG ("Y" or "N") as parameter, and the function returns the VERSION of the group. In the PeopleSoft Application Engine API, you call a section GB_API.GB_EXEC. The refresh flag is set before this call by updating AE_GB_API_AET.REFRESH_SW, and you retrieve the version of the group in the cache record AE_GB_API_AET.VERSIONGBQDM.
Why can't we use the PeopleCode API directly in a PeopleSoft Application Engine PeopleCode step?	There is a PeopleTools limitation: The CallAppEngine() function is not intended to be inserted into an Application Engine PeopleCode step. If you need to call an Application Engine program from another Application Engine program, you must use the Call Section Action.

Developing Client-Specific Workflow

This section provides the additional steps that must be performed for implementing workflow. This specific workflow is an enhancement to the generic workflow that is provided by default by the Group Build 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.

Although the business process diagram looks like the Group Build generic workflow business process, you have to develop a business process for each client module to enhance the information that is provided by the Group Build generic workflow. The reasons for this are:

- The worklist routing to enhance user information should branch the operator directly to the calling-client module page.
- The business event is triggered from the client module page.

The worklist record table has to contain key fields for accessing the client module page, so map those fields to the appropriate client module page fields (the workflow is triggered from the calling page).

The Message Agent is responsible for entering data on the client module page for triggering the specific workflow. The Database Agent executes a query that retrieves the values that are passed as Message Agent input fields. Therefore, the Database Agent query should retrieve the necessary key values, plus the condition for triggering the workflow.

You have to define a new client-specific table record (MySpecificWorkflowTable). This record stores all client module key fields, the group ID (GB_GROUP_ID) field, and the version (VERSIONGBQDM) field. Populate the MySpecificWorkflowTable after you call Group Build (to get the version number).

Summary

As a client module developer, you have to:

1. Define a new table (MySpecificWorkflowTable) for storing the page key, group ID, and version number fields.
2. Define a new worklist table record.
3. Define a derived/work field that is responsible for triggering the workflow.
4. Add this field to the client module page as a hidden field.
5. Provide PeopleCode for storing page key values before calling Group Build.
6. Define a Database Agent query for retrieving the key field values: group ID, version number, and operator ID.
7. Design the business process (activities, steps, business event, worklist routing, email routing, Database Agent, and Message Agent) and define the necessary attributes and field mappings.
8. Define a new process for the modified Database Agent (MyDBAGProcess) in PeopleSoft Process Scheduler.
9. Define a new job (MySpecificJobName) that serializes PeopleSoft Application Engine, calling the section GB_EXEC in Application Engine GB_API and the modified Database Agent process (MyDBAGProcess).
10. Pass the new job name to Group Build as a parameter through a new API function, GB_SET_JOB_WF(MySpecificJobName), which passes the new job name to be

scheduled, enables the specific workflow, and disables the generic workflow. The call to this function must be done before the call to GB_EXEC.

11. Add PeopleCode to save the necessary information in MySpecificWorkflowTable (see the following procedure).

To add PeopleCode to save the information in MySpecificWorkflowTable:

Design MySpecificWorkflowTable so that all the key fields that are necessary for accessing your client module page will be recorded.

Add two key fields, GB_GROUP_ID and VERSIONGBQDM, to your record.

Add a workflow flag, WF_FLAG.

1. Design MySpecificWorkflowDerived/Work.

Add two fields: GB_TRIGGER_WF (responsible for triggering the workflow) and OPRID (important for routings).

Make the fields invisible.

2. Define a worklist record, MyWorklistRecord, for routing to the calling client module page.

   BUSPROCNAME, ACTIVITYNAME, EVENTNAME, WORKLISTNAME, INSTANCEID, and TRANSACTIONID are standard, required fields for a worklist record.

   Add all of your page's key fields, plus the GB_GROUP_ID and VERSIONGBQDM fields.

3. Define the Database Agent (DBAG) query.

   The DBAG query is responsible for calling the client module key field values: group ID, group version number, and operator ID.

In PeopleSoft Tree Manager, add MySpecificWorkflowTable to the HR ACCESS GROUP, as follows:

Go to PeopleSoft Query.

Join MySpecificWorkflowTable and GB_GENERICWF on group ID and version number to return specific key values: group ID, group version number, workflow triggering flag, and operator ID.

Include in your criteria prompts on group ID and version number.

Save your query as a public database agent query named "_DBAG__MySpecificWorkflowQuery".

4. Design the MySpecificBusinessProcess.

In PeopleSoft Application Designer, define a business process.

MySpecificBusinessProcess has two activities:

- MySpecificWorkflowModule
- MySpecificWorkflowModuleResult

Each activity has only one step branching to the client module page:

In the MySpecificWorkflowModule activity, add a business event, a worklist routing, an email routing, a database agent, and links.

Define each item and its required attributes.

The business event is triggered from the MySpecificWorkflowDerived/Work record.

Add workflow PeopleCode, using the pushbutton Edit Business Rules and write the code as displayed, providing the condition for calling the TriggerBusinessEvent function. Write the correct parameters: business process, activity, and business event to trigger.

On the Worklist Attributes page, select the record defined in step 4 as the worklist record. Specify the Business Process, its activity that works the worklist (MySpecificWorkflowModuleResult).

On the Field Map page, specify the mapping between the worklist record fields and your client module page keys.

For the OPRID field, select the role name Roleuser by Oprid Qry, binding the OPRID query variable to the MySpecificWorkflowDerived/Work.OPRID field.

For the email routing, define the field map between your email fields (SUBJECT, NOTETEXT, TO, CC, and BCC) and your module fields.

Define the Database Agent items:

- Define the target component on the Message Attributes page and provide the path to your client module component.
- In the Query Name field, enter the database agent query defined in Step 5.
- Define the mapping between the query selection fields (second column) and your client module page fields (last column).

5. Go to PeopleSoft Process Scheduler and define MySpecificWorkflowDBAGProcess

Add a new process of type Database Agent on the Process Definitions page.

On the Process Definition Options page, override the parameters list in Append mode, specifying the following as parameters:

- E100 -T -L /A MySpecificWorkflowModule /MD MyDatabaseAgentName

- kbind1=:DERIVED_HR_GB.GB_GROUP_ID2 -
  kbind2=:DERIVED_HR_GB.VERSIONGBQDM
- /A stands for Activity Name
- /MD stands for Message Definition
- -kbind1 and –kbind2 are bind variables from the API work page.

6. In PeopleSoft Process Scheduler, define MySpecificWorkflowJob.

   Add a new job serializing the Group Build Application Engine process (the one that calls GB_API.GB_EXEC) and MySpecificWorkflowDBAG database agent process.

7. Add calls to Group Build API on your client module.

   On the FieldChange PeopleCode event of your Group Build calling pushbutton, use Group Build API as described at Step 7 in the first section of this Guide. Don't forget to call the GB_SET_JOB_WF function to activate your specific workflow and disable the generic workflow.

8. Add PeopleCode to store the necessary information in MySpecificWorkflowTable.

CHAPTER 22

Using PeopleSoft Mass Change

This chapter provides an overview of PeopleSoft Mass Change and tells you how to:

- Set up PeopleSoft Mass Change security.
- Define mass changes.
- Process mass changes.

Note. Mass Change is a PeopleTool that is accessible from PeopleSoft HRMS.

See Also

PeopleTools PeopleBook: Mass Change

Understanding PeopleSoft Mass Change

PeopleSoft 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 transaction online. Its function is similar to that of PeopleSoft Query (PeopleSoft Query retrieves data from your database; Mass Change updates the database). Mass change works by:

- Selecting a set of employee records from the database.
- Defining the changes that you want to make to those records.
- Making the changes in the background, using scheduled processing.

You define mass changes using the PeopleSoft Mass Change templates (provided with PeopleSoft Human Resources). These templates simplify the mass change definition by storing the information that you use to select certain data from the database and modify it in specific ways. Usually you modify only selection and replacement values.

For example, you can use the mass change templates to:

- Update salary data.
- Remove data rows from the Temporary Job record.
- Update the mass change status for the Temporary Job record.

Warning! Because PeopleSoft Mass Change can change a large number of PeopleSoft Human Resources records behind the scenes during scheduled processing, we strongly recommend that only the most experienced users operate Mass Change. These users should have a solid understanding of Structured Query Language (SQL) and an extensive knowledge of the PeopleSoft HRMS database.

Note. The mass change features discussed in the first part of this chapter are not supported for PeopleSoft 8 HRMS for the U.S. federal government (USF). We document the federal functionality later in this chapter, in (USF) Performing Mass Organization Changes.

See Also

PeopleTools PeopleBook: Mass Change

Processing Mass Changes in PeopleSoft HRMS

Processing a mass change consists of defining and then processing the mass change.

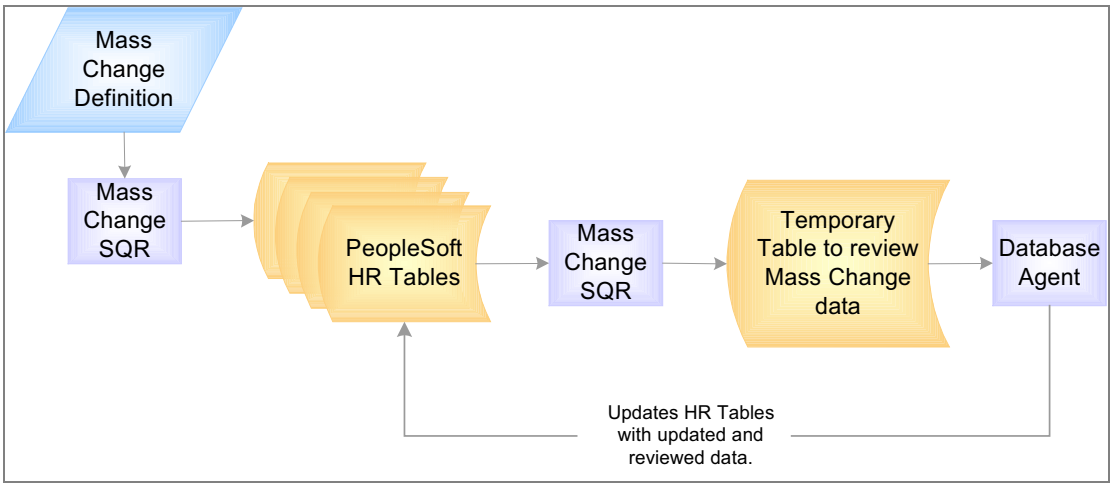
To define a mass change:

1. Select a PeopleSoft Mass Change template and use it to create the mass change definition: Outline the criteria for selecting rows and identify the columns and values that are to be changed.
2. Generate the SQL.

To process a mass change:

1. Run the Mass Change Structured Query Report (SQR) to select, change, and transfer the data to the Temporary Job tables.
2. Review the data for accuracy (optional, but recommended).
3. Run the database agent to load the data from the Temporary Job tables into your PeopleSoft HRMS tables (if applicable).

Following is an overview of the PeopleSoft Mass Change process:



Mass Change in PeopleSoft Human Resources

Setting Up PeopleSoft Mass Change Security

Prior to using PeopleSoft Mass Change for the first time, consider who in your organization should be authorized to use the mass change templates and execute mass changes. Because mass change can modify large portions of your data, we recommend that you give mass change security careful consideration.

PeopleSoft Mass Change security determines whether a user who is assigned to a particular permission list can run mass changes online, which templates are available to the user, and which mass changes the user can execute. To set PeopleSoft Mass Change security, you use the Maintain Security Permission Lists component.

Defining Mass Change Security

Use the Mass Change Security page to specify which templates the users who are assigned to a particular permission list can access and whether those users can execute PeopleSoft Mass Change online.

Click OK To Execute MC Online? (OK to execute mass change online?) to enable users who are assigned to this permission list to execute mass changes from an online page. Executing PeopleSoft Mass Change online is best done for testing purposes or for updating a small database. We recommend that large mass change jobs be scheduled during off-peak hours because mass changes can significantly impact system performance.

Select the Authorized Templates that users who are assigned to this permission list can use to define mass changes. Users can execute only mass changes that are based on Authorized Templates.

See Also

PeopleTools PeopleBook: Security, "Working With Permission Lists," Mass Change Security

Defining a Mass Change

Before you run the SQR that transfers and changes data, provide information about the changes that are to be made. Most pages that are related to mass changes are on the PeopleTools Mass Change menu; the pages that you use to enter the definition are on the Use menu.

You will find many uses for PeopleSoft Mass Change in your PeopleSoft HRMS applications. To illustrate how you might tap its potential, we've created several mass change templates that you can use to update specific data, according to various combinations of criteria.

Running PER099 for Employee-Related Mass Changes

If your mass change includes employee information, you must run the Refresh PS_EMPLOYEES table process (PER099) before you select criteria and defaults for your mass change. This updates all employee information as required by PeopleSoft Mass Change.

Starting PeopleSoft Mass Change

To add or update a mass change definition, 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 definition. You can also search for a definition based on Mass Change Type or Mass Change Template ID, if you know them.

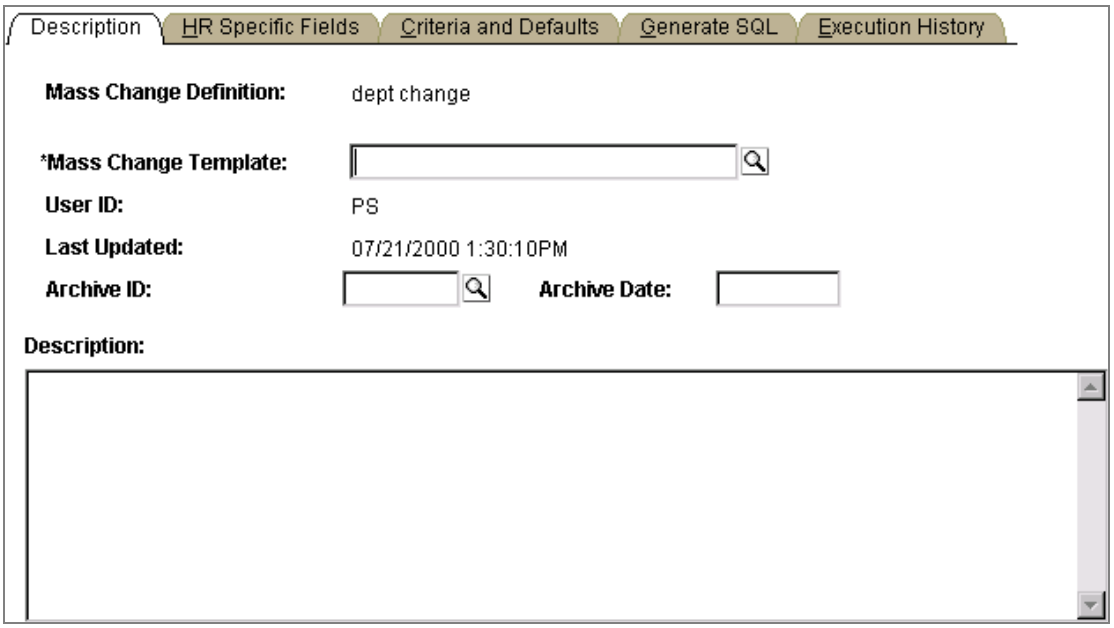
Pages Used to Define Mass Change

Page Name	*Object Name*	*Navigation*	*Usage*
Description	MC_DEFN_00	Define Business Rules, Administer HR System, Use, Mass Change Definition, Description	Specify the mass change template. Every mass change must be attached to a predefined mass change template.
HR Specific Fields	MC_DEFN_HR	Define Business Rules, Administer HR System, Use, Mass Change Definition, HR Specific Fields	Specify the effective date for the mass change records and indicate the mass change record status.

Page Name	*Object Name*	*Navigation*	*Usage*
Criteria and Defaults	MC_DEFN_01	Define Business Rules, Administer HR System, Use, Mass Change Definition, Criteria and Defaults	Specify the field criteria to use for selecting records from the database, identify which fields to change, and specify how to change them.
Generate SQL	MC_DEFN_02	Define Business Rules, Administer HR System, Use, Mass Change Definition, Generate SQL	Generate the SQL statement prior to executing the mass change. This gives you a chance to review the SQL text before running the mass change.
Execution History	MC_DEFN_03	Define Business Rules, Administer HR System, Use, Mass Change Definition, Execution History	View information about a mass change definition.

Specifying the Mass Change Template

Access the Mass Change Definition - Description Page.



Mass Change Definition - Description page

In the **Mass Change Template** field, select a template from the list.

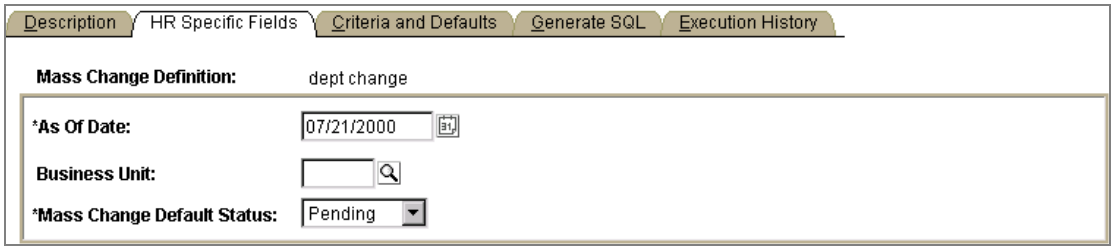
When you select a template, the system displays the **Description.** Each description includes information about the specific data records that the template references, points out required values for selection criteria and defaults, and specifies the temporary files that the mass change template creates. In the **Description** field, you can also add your own comments to document the mass change.

See Also

PeopleSoft Human Resources Mass Change Templates

Specifying the Effective Date and Status of Mass Change Records

Access the Mass Change Definition - HR Specific Fields (mass change definition - human resources-specific fields) page.



Mass Change Definition - HR Specific Fields page

As Of Date The default is today's date. Use this field to find the appropriate Job records for this transaction. We recommend making this date the same as the date that you want your change to take effect. (Do not use Mass Change to perform retroactive record changes.)

Mass Change Default Status This field sets the status value of all the mass change records that are created when you run this mass change definition. Options are:

Pending: You can review and approve the data prior to running the database agent.

Approved: You don't have to approve the data before running the database agent (with just a cursory review of the mass change data). You can review the data but you don't have to approve it.

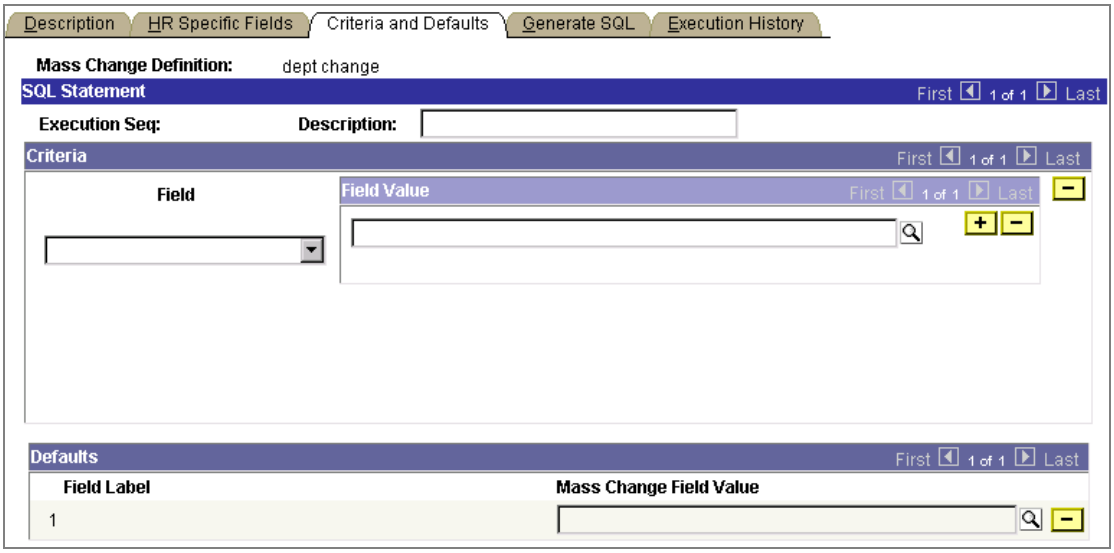
If a user schedules the database agent, the agent attempts to process any appropriate transaction that has an ***Approved*** status, regardless of the mass change definition. Therefore, all records with an ***Approved*** status should be ready for processing into your PeopleSoft Human Resources tables.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information"

Specifying the Selection Criteria

Access the Mass Change Definition - Criteria and Defaults page.



Mass Change Definition - Criteria and Defaults page

Use the **Criteria** fields to select records from the database. Use the scroll bar to move through the list of fields for the selected mass change template. Criteria fields are set using SQL operators and values.

Enter only one SQL operator for each field. You can enter multiple values.

The following table lists the operators and their meanings:

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.

Operator	*Meaning*
In Subset	In a subset of.
Not In	Not in a subset of (complement).
Like	Like (used with the % wild card).
Not Like	Not like (used with the % wild card).
Is Blank	Field is blank (can have a space or a 0).
Not Blank	Field is not blank.
Is Null	Field is null (field is empty).
Not Null	Field is not null.

You can delete fields or leave them blank, if you do not want to use them for your selection criteria. If you delete a field, the only way you can use that field in your selection criteria is to create another mass change with the same template. 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 the fields that are to be changed and how to change them. For all selected records, the value that you specify appears in the appropriate field. To display values for a field, click the drop-down list box arrow.

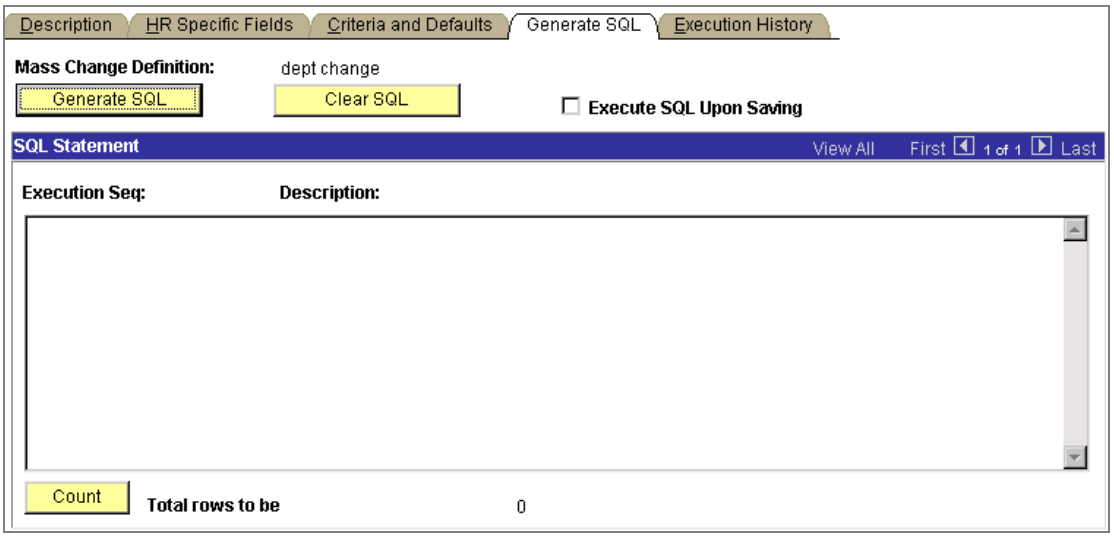
Even though you are using PeopleSoft Mass Change to update a group of records, the process edits the records as if you had processed each transaction online. The scroll list in the **Defaults** group box points to any additional field values that must be set, accompanying a valid department change. For example, 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.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information"

Generating the SQL Statement

Access the Mass Change Definition - Generate SQL page.



Mass Change Definition - Generate SQL page

Generate SQL Click to generate the SQL text.

Clear SQL Click to clear the SQL text, to change your mass change definition. Then click Generate SQL.

Count Click to count how many rows your SQL statement inserts. (First save the SQL statement so that you get the total for the current one.)

Warning! If you return to an earlier page and make changes, clear the current SQL text and click **Generate SQL** again. Otherwise you'll process the mass changes using the incorrect SQL statement.

Execute SQL Upon Saving To generate SQL online, select the check box and save the page. The primary permission list that is assigned to your user ID determines whether you have permission to execute mass changes online.

If you left any fields blank on the Criteria and Defaults page, the system warns you that these fields are blank.

Transferring Mass Change Data Into Temporary Job Tables

At this stage in the process, you have completed a mass change definition and you are ready to transfer the selected data into the temporary table. The Mass Change SQR executes the SQL that is generated from your mass change definition.

Executing Mass Changes

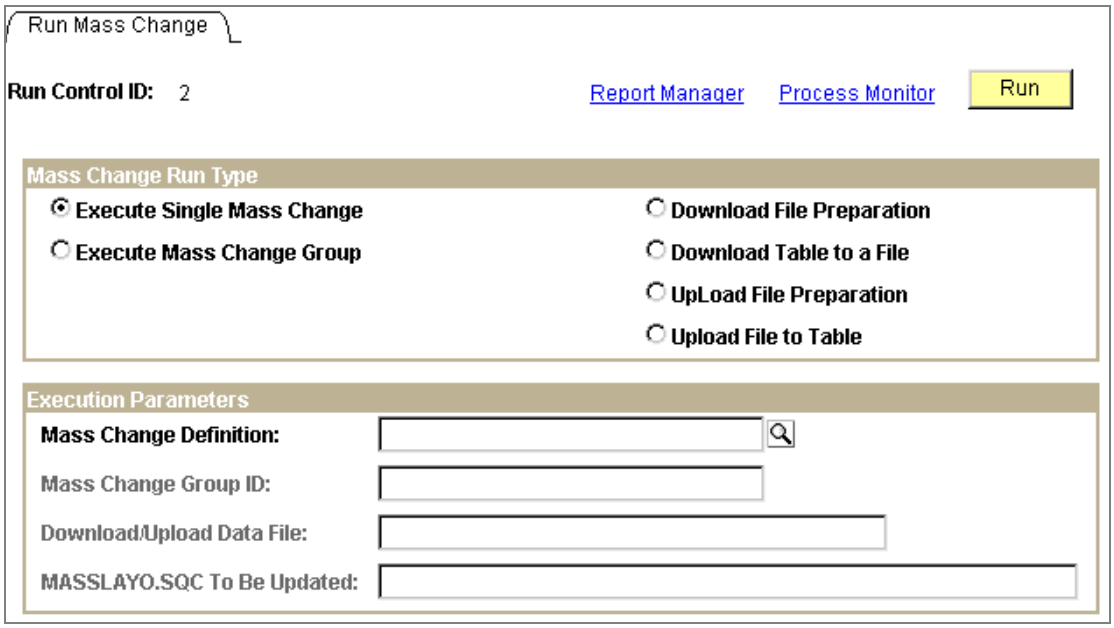
You can execute mass changes online or in the background. To execute a mass change online, use the Generate SQL page in the Mass Change Definition component.

Page Used to Run Mass Changes in the Background

Page Name	*Object Name*	*Navigation*	*Usage*
Run Mass Change	RUN_MASSCHNG	Define Business Rules, Administer HR System, Process, Mass Change, Run Mass Change	Specify which mass change you want to execute in the background. The primary permission list that is assigned to your user ID determines which mass change templates you have permission to execute.

Specifying the Mass Change to Be Run

Access the Run Mass Change page.



Run Mass Change page

Mass Change Run Type Select a mass change run type.

Execution Parameter Each run requires an execution parameter.

Execute Single Mass Change Select for your mass changes.

Run Click to run the PeopleSoft Mass Change process.

See Also

PeopleTools PeopleBook: Mass Change

Verifying Data in the Temporary Tables

Use the following inquiry pages to see what data was loaded into JOB_TMP_MC by the mass change SQR:

- Mass Job/Comp Chg By Status - Maintain Status (mass job/compensation change by status - maintain status) inquiry page

  Use this page to view the records with the changes displayed. If you don't change the default on the Mass Change Definition – HR Specific Fields page, the status of your mass change records is *Pending.*

- Mass Job/Comp Chg By Deptid - Maintain Status (mass job/compensation change by department ID - maintain status) inquiry page

Use this page if the temporary table is large and you want to view the records by department (to make your review easier).

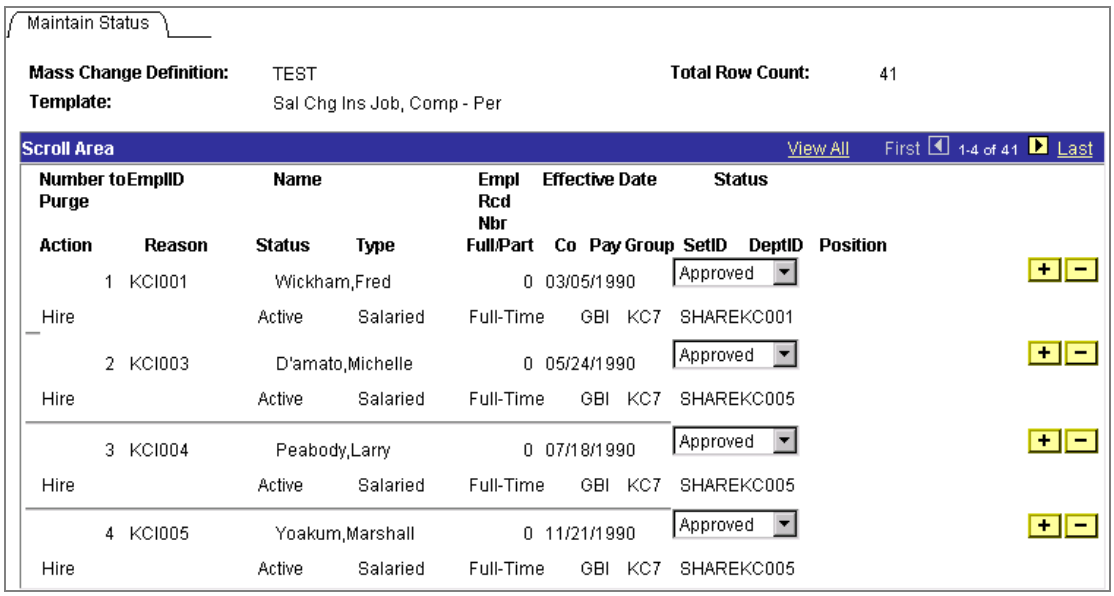
Use these pages to preview the data that is loaded into the PeopleSoft Human Resources tables when you run the database agent. If you catch errors, either cancel the transaction (by selecting the status *Canceled)* or delete the records, modify the mass change definitions, and run the SQR again.

Pages Used to View Mass Job and Compensation Changes

Page Name	*Object Name*	*Navigation*	*Usage*
Maintain Status	JOBCMP_TMP_MC	Define Business Rules, Administer HR System, Inquire, Mass Job/Comp Chg By Status, Maintain Status Define Business Rules, Administer HR System, Inquire, Mass Job/Comp Chg By Deptid, Maintain Status	View mass job and compensation changes by status or by department.

Viewing Mass Job and Compensation Changes by Status or Department

Access the Maintain Status inquiry page.



Mass Job/Comp Change by Status - Maintain Status page

See Also

PeopleSoft Human Resources Mass Change Templates

Populating Tables With Mass Change Data

After you verify that your mass change definition has loaded the data into the Temporary Job Table, insert the new data into your PeopleSoft Human Resources Job Table. To do this, use a database agent to select the data from the Temporary Job Table and map it to the Job Data pages.

Posting Mass Changes to Job Data

You use database agents to update records with many online edits. This process leverages the PeopleSoft Workflow tools that ensure consistent PeopleCode editing of your records in batch mode. Database agents are required only for processing mass changes that copy data from the Temporary Job Tables into the PeopleSoft Human Resources tables.

To post mass changes to job data:

1. Navigate to the Post Mass Change to Job process run control page as follows:

   Define Business Rules, Administer HR System, Process, Process Mass Change to Job

2. Click Run to access the Process Scheduler Request page.

   Select a database agent and make additional settings in PeopleSoft Process Scheduler.

Selecting a Database Agent

To select a database agent:

1. Access the Process Scheduler Request page.
2. Select a process **Type** of ***Database Agent*** from the **Process List.**
3. Select an agent based on the type of mass change that you run.

   Options are:

   - ***Dept Change Insert Job Record*** (department change insert job record) – Inserts the new department records that you created using a Dept Change template. The database agent inserts the new row of data based on the as of date that you assigned on the Mass Change Definition - HR Specific Fields page.
   - ***Dept Change Update Job Record*** – Works like ***Dept Change Insert Job Record*** except that it updates all future-dated records with the new department ID.
   - ***Salary Change: Change Amt*** (salary change: change amount) – Processes a salary mass change that is based on a change amount that you specify using a Salary Change template. Maps to the Change Amount field on the Job Data 3 page. If your salary change is based on a percentage increase or a compensation rate, use one of the other database agents for mass salary changes. Only one agent is appropriate for a particular salary mass change.
   - ***Salary Change: Change Pct*** (salary change: change percent) – Processes a salary mass change that is based on a change percent that you specify using a Salary Change template. Maps to the Change Percent field on the Job Data 3 page. If your salary change is based on a change amount or a compensation rate, use one of the other salary database agents for mass salary changes. Only one agent is appropriate for a particular salary mass change.
   - ***Salary Change: Comp Pts*** (salary change: compensation points) – Processes a salary mass change that is based on a compensation rate that you specify using a Salary Change template. Maps to the Compensation Rate field on the Job Data 3 page. If your salary change is based on a percentage increase or a change amount, use one of the other database agents for mass salary changes. Only one agent is appropriate for a particular salary mass change.
4. Select a database agent and click **OK** to run the process and transfer the Temporary Job data into PeopleSoft Human Resources tables.

See Also

PeopleTools PeopleBook: Process Scheduler

Reviewing Mass Changes

If the database agent encounters more than 100 errors while processing the mass changes, it turns itself off and processes an error report. Review the mass change records or modify your mass change definition and regenerate the mass change SQL.

PeopleSoft Human Resources Mass Change Templates

PeopleSoft Human Resources provides mass change templates for deleting definitions and data from the tables. Use these templates to undo changes, correct errors, and perform housekeeping operations.

The tables in this section describe the mass change templates. For a quick reference to the PeopleSoft Mass Change templates, see the following chart:

Overview of Mass Change Templates

Function	*Mass Change Template*	*Database Agent*
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 (salary change: compensation 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 Major Table	Delete Major Table	Not applicable

Function	*Mass Change Template*	*Database Agent*
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

Templates for Deleting Definitions and Making Changes

Use these templates to perform housekeeping operations such as deleting mass change records and descriptions from the Temporary Job Data table. (Heading abbreviations are defined in the preceding table.)

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. Verify all steps of the mass change before deleting it from this table.

Specific Criteria Field Instructions

Specify which data to delete from the Job Temp Mass Change Table by using any combination of the following fields:

- EmplID (employee ID)
- MC Definition (mass change definition)
- MC Status
- MC Template ID

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

	history data. History data remains in the database, but isn't visible from the mass change pages.
Specific Criteria Field Instructions	***Warning!*** Provide either a Mass Change Definition or a Mass Change Template. If you leave both fields blank, then all definitions are deleted. If you select only the Mass Change Template, then all Mass Change Definitions that are associated with that template are deleted.
Specific Default Field Instructions	None
Applicable Database Agents	None
Specific Data Information	Deletes from all Mass Change tables (except the Mass Change History tables) that contain MC_DEFN_ID.
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 deletes from all Mass Change Template tables, based on the Template or Type.
Specific Criteria Field Instructions	***Warning!*** Enter either a mass change template or a mass change type. If you don't enter this information, all mass change templates are deleted. If you select a mass change type, all templates that are 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 with these templates. You can delete the types and definitions or leave them for future reference.
Deletes 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 for a mass change type and deletes the data from the Mass Change Type tables based on the mass change type that you indicate.
Specific Criteria Field Instructions	**Important!** Enter a mass change type; otherwise 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 with these types. You can 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 MC Status Job Temp

General Description	Updates the mass change status on the JOB_TMP_MC table. Useful for approving large groups of JOB_TMP_MC records.
Specific Criteria Field Instructions	Update the JOB_TMP_MC records based on the values that you entered in the Criteria fields.

Specific Default Field Instructions	Provide the new Mass Change Status.
Applicable Database Agents	None
Specific Data Information	Updates JOB_TMP_MC.

Templates for Deleting Table Data

Use the following templates to perform housekeeping operations like deleting specific data from tables in PeopleSoft Human Resources:

Delete Bank Branch Table

General Description	Asks for the transit number and branch clearing number that you want deleted. Deletes data from the BANK_BRANCH_TBL that is associated with this credit card number. Saves no historical data.
Specific Criteria Field Instructions	***Warning!*** Enter the Transit Number and Branch Clearing Number; otherwise all data from the BANK_BRANCH_TBL is deleted.
Specific Default Field Instructions	None
Applicable Database Agents	None
Deletes from	BANK_BRANCH_TBL BANK_BRANCH_LNG

Delete Bank Table

General Description	Asks for the transit number that you want deleted. Deletes data from the BANK_TBL that is associated with this transit number. Saves no historical data.
Specific Criteria Field Instructions	***Warning!*** Enter the Transit Number; otherwise all data in the BANK_TBL is deleted.
Specific Default Field Instructions	None
Applicable Database Agents	None
Deletes from	BANK_TBL BANK_TBL_LNG

Delete Major Table

General Description	Asks for the major code that you want deleted. Deletes data from the MAJOR_TBL that is associated with that code. Saves no historical data.
Specific Criteria Field Instructions	***Warning!!*** Enter the Major Code; otherwise all data is 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 for the process type and process name that you want deleted. Deletes that process definition from the Process Scheduler definition tables.
Specific Criteria Field Instructions	***Warning!*** To delete a definition, enter both the process type and process definition name; otherwise you could delete all process definitions.
Specific Default Field Instructions	None
Applicable Database Agent	None
Deletes from	PRCSDEFN PRCSDEFNGRP PRCSDEFNLANG PRCSDEFNPNL PRCSDEFNXFER

Delete School Table

General Description	Asks for the school code that you want deleted. Deletes any data from the SCHOOL_TBL that is associated with this License/Certification Code. Saves no historical data.
Specific Criteria Field Instructions	***Warning!*** Enter the School Code; otherwise all data in the SCHOOL_TBL is deleted when you process the mass change.
Specific Default Field Instructions	None
Applicable Database	None

Agents

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. Deletes data from the STATE_NAMES_TBL that is associated with the country and state. Saves no historical data.
Specific Criteria Field Instructions	***Warning!*** Enter the Country and the State; otherwise all data in the STATE_NAMES_TBL is deleted.
Specific Default Field Instructions	None
Applicable Database Agents	None
Deletes from	STATE_NAMES_TBL
	STATE_NAMES_LNG

Salary Change Templates

These templates are for making mass changes to salary records in PeopleSoft Human Resources:

- Salary Chg Insert Job-Component (salary change insert job-component [compensation])
- Sal Chg Insert Job Comp-Emp (salary change insert job compensation-employment)
- Sal Chg Insert Job, Comp, Emp, Per (salary change insert job, compensation, employment, personal data)
- Sal Chg Ins Job, Comp - Per

The following table describes how to use these templates. You use each template the same way except for the Specific Data Information section. Following the general usage table below, that section is described for each template.

General Description	This process makes salary changes to large groups of employees, based on specific selection criteria. The Job data or Job and Compensation data (depending on which template you are using) for these employees is placed in a temporary table for you to review and approve. When you finish reviewing the employee list, run the database agent Salary Change: Change Pts (salary change: change points). This agent takes the approved, temporary

Job records and uses them to insert new Job records for the employees with the specified salary changes.

Specific Criteria Field Instructions

Select employees based on the various fields on the Job, Compensation, Employment, and Personal Data records (depending on which template you are using).

You can delete fields or leave them blank, if you don't want to use them for your selection criteria. If you delete a field, the only way that you can use that field in your selection criteria is to create another mass change with the same template. If you leave the criteria field blank, a warning message tells 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 and 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.

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. Avoid retroactive department changes; they might cause errors when you use the database agent to insert the new Job records.

Note. To reuse the same Mass Change Definition with the same JOB_EFFDT and JOB_EFFSEQ, but using an updated percent change, amount change, or total compensation amount, first run the database agent to update JOB or both JOB and COMPENSATION (depending on which template you are using).

If you don't need any of the Job, Employment, or Personal data as part of your selection criteria, use the Sal Chg Cur Job: Job (salary change current job: job) template (it runs faster). Employment data and Personal Data fields are indicated by *(Employment)* and *(Personal Data)*, respectively, following the field descriptions. Job data fields have descriptions only.

Other data that you might want to change during a salary change: 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.

Applicable Database Agents

Salary Change: Comp Rate - MCHRSC01.

Salary Chg Insert Job-Component

Specific Data Information Gets current Job records for employees, based on the mass change as of date, and inserts them into the Temporary Job Table.

Selects from JBCMP_CUR_MC_VW.

Inserts into JOBCOMP_TMP_MC.

Sal Chg Insert Job Comp-Emp

Specific Data Information Gets current Job records, based on Job and Employment data and the mass change as of date, and 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 Job, Comp, Emp, Per

Specific Data Information Gets current Job records, based on Job, Employment, and Personal data and the mass change as of date, and 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

Specific Data Information Gets current Job records, based on Job, Employment, and Personal data and the mass change as of date, and 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 might require making the same organizational change to a large group of your PeopleSoft Human Resources records. For example, suppose that an agency restructuring requires the transfer of a group of employees from the Office of the Director, Budget Division to the Office of the Director, Account Standards Division. Instead of performing this transfer manually, you can make the changes all at once using the Mass Organization Change functionality. This involves:

- Selecting a set of employee records from the database.
- Defining the changes that you want to make to those records.
- Making the 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 a multiple-step process for performing mass organization changes quickly and easily. In this section, we tell you how to perform mass organization changes by position and by department.

Using the Mass Organization Changes features, you can transfer employees from one department into another department. You can also transfer employees from their current positions to other positions within the organizational and reporting structures. Also, you can set up new departments and positions and perform the mass transfer of employees into those departments and positions.

Before You Begin

To perform mass organization changes, you must be familiar with PeopleSoft Tree Manager. This section assumes that you know how to use PeopleTools Tree Manager.

See Also

PeopleTools PeopleBook: Tree Manager

Understanding Mass Organization Changes

Examples of organizational changes are:

- Transferring employees into existing departments or positions
- Creating new departments or positions, changing the organizational structure, and transferring employees into the new departments or positions.
- Merging employees from multiple departments or positions into new or existing departments and positions.

Each organizational change is a multiple-step process.

To make an organizational change:

1. Enter some key data to set up the change, following your agency's procedures.

   For example, you might 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.

2. Set up parameters to define the type of change and the specific details.

Different types of changes vary in complexity, from simple data changes to more complicated updates:

- A simple change is the mass transfer of employees from one department or position to another.
- A more complex change is where the organizational structure is changed, but no manager positions or Reports To positions are changed.
- An even more complex change is where the organizational structure as well as the manager and/or Reports To positions are changed.

The two types of mass organization changes are department and position changes. Each requires that you set up the data that defines the change and then run specific processes.

For some changes, you do all of the steps; for others, you might not need to do every step.

All actions that are processed by the Mass Organization Change SQR are assumed to have been approved by your agency and are entered into the system as if they had been entered through a PeopleSoft Human Resources processing or update menu. Mass changes affect a large number of rows of data in the system, which makes this a powerful tool. Therefore, you must give careful consideration to selecting the person in your organization who is allowed to perform mass organizational changes.

If you are performing several mass change operations, assigning each one a unique mass organization change ID helps you retain and identify all of them. You can group them when you set up your run process.

Performing Mass Organization Changes

You perform mass organization changes using a series of steps. Using the data that you provide the system makes the designated changes for you. You can run mass organization changes for departmental changes or position changes. The steps for both types of changes are similar.

To perform mass organization changes for departments:

1. Set up mass organization change data.

   Set up the type of change (departments or positions), the effective date of the change, the NOA (nature of action) and authority codes and descriptions, and the departments and positions that are being changed to the new department and positions. Use the Setup Mass Organization Change page.

2. Create a new department or change an existing department.

   To create a new department or to change the organizational structure for an existing department, update the Department Table in the department tree structure in PeopleSoft Tree Manager or the organizational structure in the Department Table. Do this step only to create a new department or change the department hierarchy.

3. Re-create the departmental security tree.

   Re-create the departmental security tree and revalidate the Tree Table using the Security Administration page. Do this step only if the security tree was changed.

4. Re-create the departmental hierarchy information for the Department Table.

   Re-create the departmental hierarchy information for the Department Table by running the Refresh Department Table (FGHR006) process from the Build Department Organization page. Do this step only if the security tree was changed.

5. Generate mass organization change data.

   Use the Apply MOC page (apply mass organization change page) to generate mass organization changes based on the Mass Organization Change data setup. This determines which employees in the departments are affected and inserts new rows of data in GVT_JOB.

To perform mass organization changes for positions:

1. Set up mass organization change data.

   Set up the type of change (department or position), the effective date of the change, the NOA (nature of action) and authority codes and descriptions, and the departments and positions that are being changed to the new department and positions. Do this using the Setup Mass Organization Change page.

2. Update any existing positions with the new organizational information or structure.

Use PeopleSoft Tree Manager to update the Department Position Tree.

a. Open Tree Manager.

b. Drill down to HR: Position tree.

c. Click any node in the tree to open the Position Data component.

d. Update the Position tree.

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 the Build Position Structure page to run the SQR Build Position Structure (POS006A) process.

4. Generate mass organization change data.

   Use the Apply MOC page (apply mass organization change) to generate mass organization changes based on your Mass Organization Change data setup. This determines which employees are affected 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 process to test and verify the changes that were performed.

See Also

"Administering PeopleSoft Security," Building and Modifying Security Trees

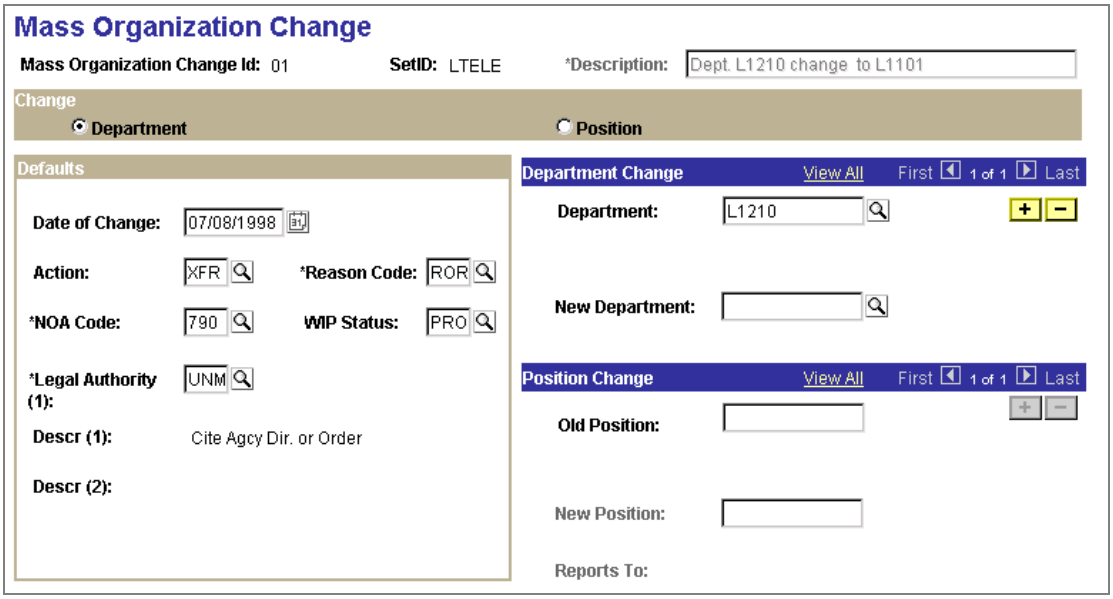
PeopleSoft Human Resources PeopleBook: Manage Positions, "Maximizing Position Data," Maintaining Position Hierarchies in the Tree Manager

Page Used to Define Mass Changes

Page Name	*Object Name*	*Navigation*	*Usage*
Mass Organization Change	GVT_MOC_DATA	Administer Workforce, Mass Organization Changes USF, Setup, Setup Mass Organization Change, Mass Organizational Change	Define mass changes.

Defining Mass Changes

Access the Mass Organization page.



Mass Organization Change page

Change

Department Select if this is a department change.

Position Select if this is a position change.

Defaults

NOA Code (nature of action code) Select the NOA code.

WIP Status (work-in-progress status) Select the WIP status.

Legal Authority (1). Select the legal authority. This field is required.

Department Change

Department If this is for a department change, enter the name of the department that is being changed. If you are merging two departments into one, enter both department names.

New Department If this is a department change, enter the new department name.

Position Change

Old Position Enter the old position name. If you are merging two positions into one new position, enter both position names.

New Position When you select the **Position** option in the **Change** group box, this field becomes available for entry. Enter the new position name.

Reports To When you select the **Position** option in the **Change** group box, this field becomes available for entry. Enter the name of the position that the new position reports to.

Page Used to Re-Create Departmental Hierarchy Information

Page Name	*Object Name*	*Navigation*	*Usage*
Build Department Organization - Refresh Department Table	RUNCTL_FGHR006	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	Re-create the departmental hierarchy information for the Department Table, if you made changes to the security tree.

Re-Creating Departmental Hierarchy Information

Access the Build Department Organization - Refresh Department Table page.

See Also

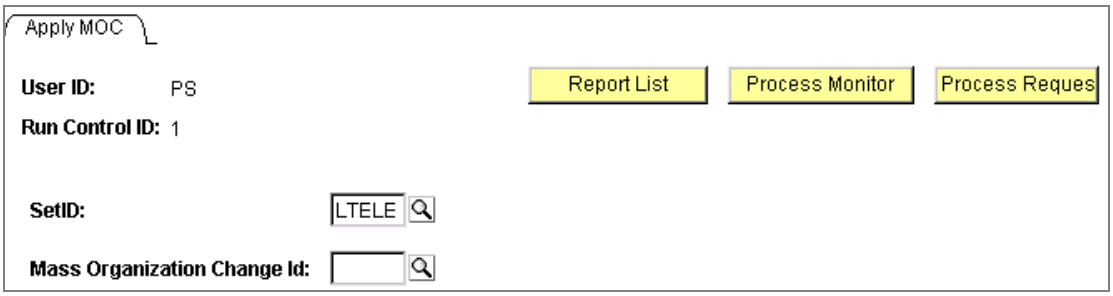
PeopleTools PeopleBook: Process Scheduler

Page Used to Generate Mass Organization Changes

Page Name	*Object Name*	*Navigation*	*Usage*
Apply MOC (apply mass organization changes)	RUNCTL_GVT_MASSORG	Administer Workforce, Mass Organization Changes USF, Process, Apply MOC, Apply MOC	Run the SQR process FHGR030 to generate mass organization changes to your system data, based on the information that you entered on the Mass Organization Change page.

Generating Mass Organization Changes

Access the Apply MOC page.



Apply MOC page

Mass Organization Change Id

Select the ID of the mass organization change that you want to process. You set up mass organization change IDs on the Setup Mass Organization Change page.

This process determines the affected employees in your departments and inserts new rows of data in GVT_JOB. The system generates an exception list file (.lis) and places it 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 that were updated by the process. You can correct the discrepancies by entering them directly into the employee's Job pages.

CHAPTER 23

Using PeopleSoft Workflow

This chapter provides an overview of PeopleSoft Workflow and tells you how to:

- Use Workflow in your HRMS business processes.
- Set up Workflow roles and role users.
- Set up routine data.
- Activate Workflow.
- Set up Workflow approval functionality.
- Use the business processes in PeopleSoft Human Resources.

Understanding PeopleSoft Workflow

Many tasks that you perform are parts of larger tasks that involve several steps and people working together. For example, when you hire an employee using PeopleSoft Human Resources, you start a process that involves several individuals:

- One who signs up the employee for benefits.
- One who reviews and approves equipment requisitions.
- One who enters tax information for payroll.

PeopleSoft Workflow automates this entire process as well as other processes.

See Also

PeopleTools PeopleBook: Workflow

PeopleTools PeopleBook: Security

Components of PeopleSoft Workflow

A workflow comprises what we call *the three Rs*: rules, roles, and routings. These components work together to ensure that:

- Your organization's business processes are followed.

- Appropriate actions are taken in a timely manner in response to an event.
- The right individuals in your organization are involved in the process.

You use PeopleSoft Application Designer and Security to define the three Rs of workflow: You define rules and routings in PeopleSoft Application Designer and roles through PeopleSoft Security.

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 is triggered only when a new employee is hired; it isn't triggered if the person you are adding to the database is a PeopleSoft 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 follow them, without requiring extra work of them.

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, rather than the individuals, who performs 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. Who the payroll manager is doesn't matter; it's the person who enters the data that matters. If that person is on vacation, using PeopleSoft Workflow enables you to automatically (and temporarily) route that person's tasks to a substitute.

Routings

Routings connect information to people. Routings determine the method by which data flows from one step or person in a process to another. Routings specify where the information goes and what form it takes: email message, electronic form, or worklist entry.

The network of routings creates a business process from what used to be isolated activities. Routings get the right information to the right people at the right time, enabling users to work together to accomplish the company's goals.

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 select 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.

Note. While several workflow business processes are delivered with your HRMS system, the system is delivered with all workflow turned off. You must activate PeopleSoft Workflow to use it.

Use PeopleSoft Workflow Administrator to access, monitor, and analyze workflow in your organization. Using PeopleSoft Security, you can add or modify role and role user information. Also use it to maintain the relationship between roles and role users.

See Also

Activating Workflow

Setting Up Workflow Roles and Role Users

When you implement workflow in PeopleSoft HRMS for the first time, you must identify one of the following:

- The individual who performs the role that is referenced in the workflow process.
- The position from which the role is performed.

The individuals (or positions) are called role users. For example, the Hire Employee workflow references a role called Benefits Administrator. Until you assign a role user to act as the Benefits Administrator, there is no one to send email or worklists to.

You can define and use as many roles as you need for your organization's business needs.

Determining Role Users

Although it is optional, we recommend that you enter all of your employees as workflow role users and assign each one a user ID. While some workflow processes involve only a few administrators and supervisors, others might involve almost every employee in your organization.

Once you assign users to roles, workflow processes that reference those roles send emails and worklists to the designated role users.

You must also designate the appropriate email ID, form ID, and user ID for each role user so that emails, forms, and worklists can be generated.

Creating Role Users Using a Message Agent

PeopleSoft HRMS includes a message agent that enters all of your active employees as role users automatically.

While you could manually enter each employee as a role user on the Role User and IDs page, this process is tedious if you're designating many employees as users. Workflow processes

(like Process Employees With Late Reviews and Verify Employee Address) could involve every individual in your organization at one time or another. Using the message agent is a faster way to transform your employees into workflow role users.

Choosing a Supervisor Role

One of the most frequently used and important roles in workflow is that of the Supervisor (or Administrator). Role users that you assign 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 so important, it is vital to maintain accurate data about those in your organization that act as supervisors and those who report to them.

There are two ways to assign and maintain the Supervisor-role-to-role-user relationship in PeopleSoft HRMS:

- Using the User Profiles component in PeopleSoft Security.
- Using one of the dynamic role user queries in PeopleSoft HRMS.

Using the User Profiles Table

Use the User Profiles - Workflow page (Supervising Role User field) in PeopleSoft Security to manually define supervisor roles. Maintaining the Supervisor role this way requires maintaining your supervisor data in the PeopleSoft HRMS database, where it naturally resides, and in the User Profiles Table. The data in the User Profiles Table is the data that you entered the last time you updated your Supervisor role users in that table.

Using the Dynamic Role User Queries

Use one of the three dynamic Structured Query Reports (SQRs) that query your live human resources database when a workflow involving a Supervisor role is triggered. You select and assign a role user query to the Supervisor routings based on whether you're driving your PeopleSoft Human Resources system by full, partial, or no Position Management. The following table lists the role queries from which you can select. Select the one that is appropriate for your human resources implementation.

Functionality	***Query***
Full Position Management	[ROLE] Supervisor-Full Posn Mgt (supervisor - full position management)
Position Management turned off	[ROLE] Supervisor-No Posn Mgt
Partial Position Management	[ROLE] Supervisor-Part Posn Mgt

Using the dynamic role user query method ensures that the Supervisor role user assignment is as accurate as your live human resources data. The dynamic query also frees you from

maintaining two sets of human resources supervisor data, one in your human resources system and the other in the Role User Table.

The default query is [ROLE] Supervisor-Part Posn Mgt Role User Query. All generic PeopleTools workflows use that query. The query does not run against your live human resources database, but against the Role User Table.

To use one of the other Supervisor role user queries in PeopleSoft Workflow, you must modify all routings involving supervisors.

Activating Workflow

PeopleSoft HRMS includes several workflows that are triggered by business events that occur while you work in your HRMS system. These workflows require some setup and modification, so (as delivered in PeopleSoft HRMS) they are not activated. For example, before you can use the Hire Employee workflow, you must assign user IDs to (for example) the Benefits, Personnel, and Training administrators that the workflow references when delivering worklists and email routings.

To activate the workflows that are part of your PeopleSoft HRMS system:

1. Access the Workflow System Defaults page. .

   The Workflow System Defaults page is on the PeopleTools, Workflow Administrator, Use menu.

2. Select either the Worklists Active, Email Active, or Electronic Forms Active to activate one of these workflow processes in your system.

   Remember that these options have a system-wide impact.

3. 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 check box, then use the User Profiles component in PeopleSoft Security to maintain supervisor information for your role users.

4. To use workflow generally but turn off particular events, use PeopleSoft Application Designer to deactivate the events in the Event Definition.

Important! Although we deliver PeopleSoft HRMS with system-wide routings turned off, all events are active.

See Also

PeopleTools PeopleBook: Workflow, "Administering Workflow"

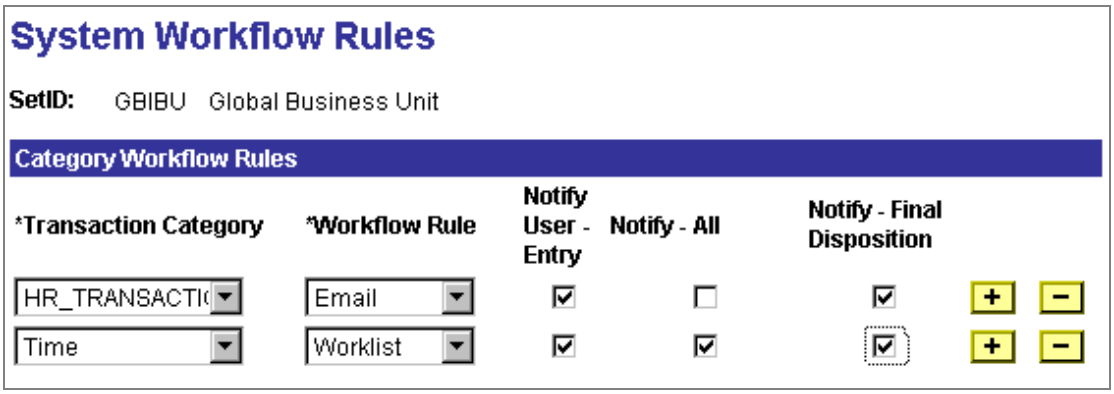
Using the Dynamic Role User Queries

Pages Used to Set Up and Modify Workflow Approvals

Page Name	*Object Name*	*Navigation*	*Usage*
Workflow Transaction Categories	EO_TRAN_CATS	Define Business Rules, Define General Options, Setup, Workflow Categories	Display the categories in which transactions can be placed as derived from the System Workflow Rules page.
Workflow Transactions	EO_TRANSACTIONS	Define Business Rules, Define General Options, Setup, Workflow Transactions	Displays the transactions and the categories in which they belong, which PeopleSoft ships as system data with the database.
System Workflow Rules	EO_SYS_WF_RULES	Define Business Rules, Define General Options, Setup, Workflow System Rules	Define the processing rules for a category of transactions.
Workflow Status	HR_WF_STATUS	Define Business Rules, Administer HR System, Setup, Workflow Status, Hr Wf Status	Change workflow approval paths for self-service transactions that involve submitting and approving or denying requests.
Workflow User Preferences	HR_SS_WF_EE_PREF	Self Service, Employee, Profile, Workflow User Preferences, SS WF User Preferences	Define how to receive workflow notifications for self-service workflow transactions. For the user to have access to this page, a Workflow Rule of User must be in place for the workflow user's SetID on the System Workflow Rules page.

Defining Processing Rules for Transaction Categories

Access the System Workflow Rules page.



System Workflow Rules page

For different rules to exist for different business units specify these rules at the SetID level.

Note. You must specify this information when you implement PeopleSoft HRMS.

Transaction Category Select a transaction category.

Workflow Rule Define how the system notifies users when they're required to perform a function. Values include:

Email: Notify the user via email.

Worklist: Notify the user by placing an entry on the user's worklist.

Both: Notify the user by both email and worklist.

None: No notification.

User: Enable the user to define a preference. The user specifies preferences on the Workflow User Preferences page.

Notify User - Entry Select if users are to receive confirmation when initiating transactions.

Notify All Select if users are to be notified each time someone processes one of their transactions.

Notify - Final disposition Select if users are to be notified only when all approvers have made decisions regarding their requests.

Setting Up Workflow Approvals for Self-Service Transactions

Set up workflow for self-service transactions just as you do for other workflow processes. Any set of transactions that involves approvals (where requests are submitted and then approved or denied) involves workflow approvals.

For full workflow notification to occur as part of processing the information that you enter into a set of transactions, you must (at a minimum) activate workflow emails and worklists for

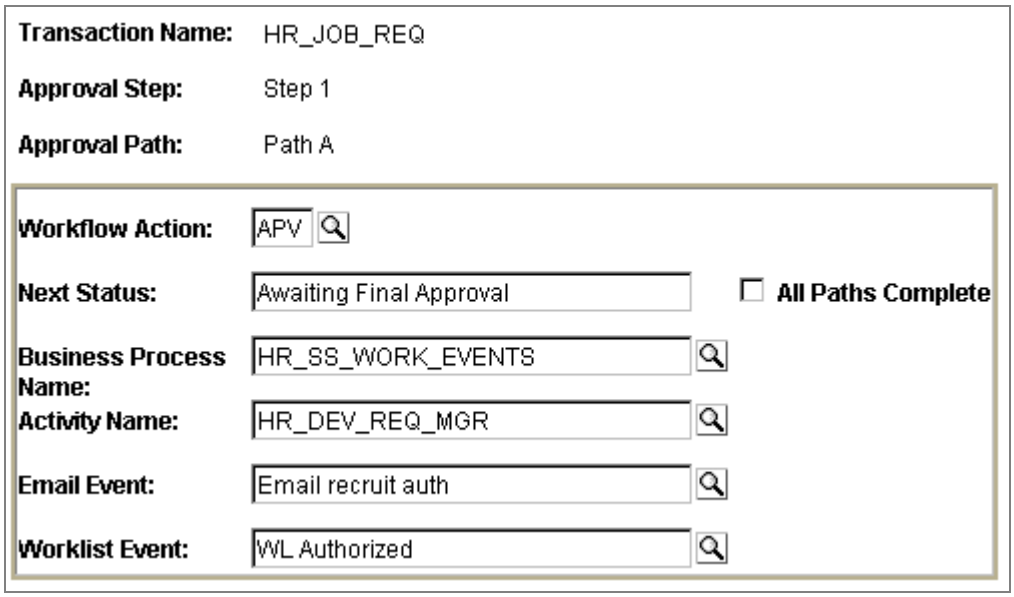
those transactions. Also arrange for each originating participant in the transaction to receive worklists, emails, and valid email addresses. For example, some eRecruit transactions involve managers, authorizers, and recruiters.

Once you've set up an approval workflow for a self-service transaction, you can modify it by using the Workflow Status Table. That table enables you update and change approval paths for a transaction.

PeopleSoft provides a Workflow User Preferences page that enables employees who are involved in workflow approval processes to determine whether they receive workflow notifications by worklist, by email, or both.

Changing Workflow Approval Paths

Access the System Workflow Status page.



Workflow Status page

Transaction Name The system displays the system name of the transaction.

Approval Step Lists the approval step that 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.

Workflow Action Describes the workflow action that is associated with this approval step and 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 that involve approval workflow when a workflow approval reaches the selected

step. If you leave this field blank, no message appears when the role user reaches this step.

You cannot use Next Status for the following transactions:

- Promotion
- Reporting Change
- Transfer

All Paths Complete Select to have the system display the **Next Status** text only when all role users who are involved in this path have completed this step.

You cannot use All Paths Complete for the following transactions:

- Promotion
- Reporting Change
- Transfer

Business Process Name Select the business process in which the approval transaction events reside. The system gets this name from the Business Process Table.

Activity Name Select the activity in which the approval transaction events reside.

Email Event Select the type of email event (if any) that takes place when this approval step and path are completed for role users who receive email workflow notices.

Worklist Event Select the type of worklist event (if any) that takes place when this approval step and path are completed for role users who use workflow worklists.

Understanding Self-Service Transaction Workflow Approvals

All transactions that contain workflow approvals have a similar look and feel. The bottom of the transaction page contains a status area that lists each approver and the status of each approval action. When the user is in Add mode, the system hides this status area because the system has not filled in the application data, and you can't determine who the reviewers are.

A transaction page involving workflow approval also has a Submit button that saves the page and initiates the workflow. Once the user submits this information to PeopleSoft Workflow, the system lists the role users who will review the transaction in the status area. Workflow then sends an email or worklist item to the first role user who reviews the transaction.

An approver can find the transaction in the following ways:

- You arrange for the approver to receive email notifying him or her of the approval decision to be made for a self-service transaction and including a link to the transaction.

- You arrange for the approver to receive notification via the worklist.

The approver can do one of the following:

- Select the worklist item to navigate to the transaction.
- Find the transactions that require approval through the menu.

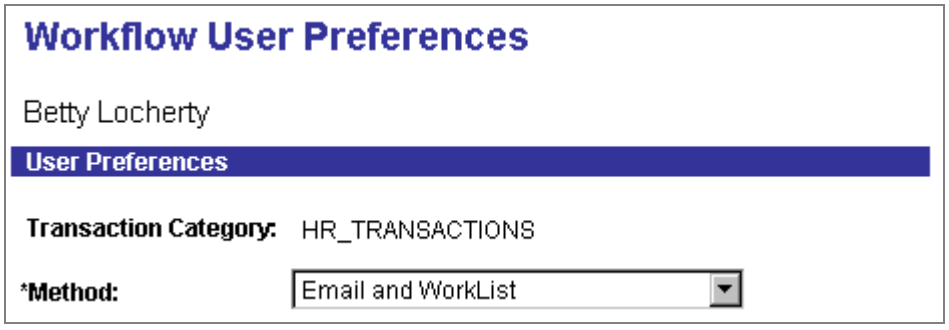
For example, if the approver has menu security for the Approve Job Requisitions transaction, the approver can select the menu item for the transaction. Then the approver receives a list of requisitions that require his or her approval. Selecting an item from the list displays the item detail.

When an approver enters a transaction that requires approval, the detailed transaction information is either display-only or available for updating, based on the transaction. If the transaction can be updated, the system displays a Save button that enables the approver to save the changed information without advancing the transaction through the workflow process.

Whether or not the transaction can be updated, the approver can approve or deny the transaction or put it 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. In the Action section of the page, the approver can enter comments describing the reason for approving, denying, or holding the transaction. Click any button to update the status section of the page.

Defining the Method for Receiving Workflow Notifications

Access the Workflow User Preferences page.



Workflow User Preferences page

The employee can update the current workflow notification method by selecting a different **Method** value ***(Email, Worklist,*** or ***Email and Worklist)*** and clicking the **Save** button.

Note. Employees can access this page only if the Workflow Rule of User is set up for both the business unit and the set of transactions that the employee used on the System Workflow Rules page.

Workflow Business Processes in PeopleSoft Human Resources

This section discusses each workflow business process, explains how it executes, and points out any special setup considerations that you should consider when using PeopleSoft Workflow for the first time.

Using Workflow Maps to Understand Workflow

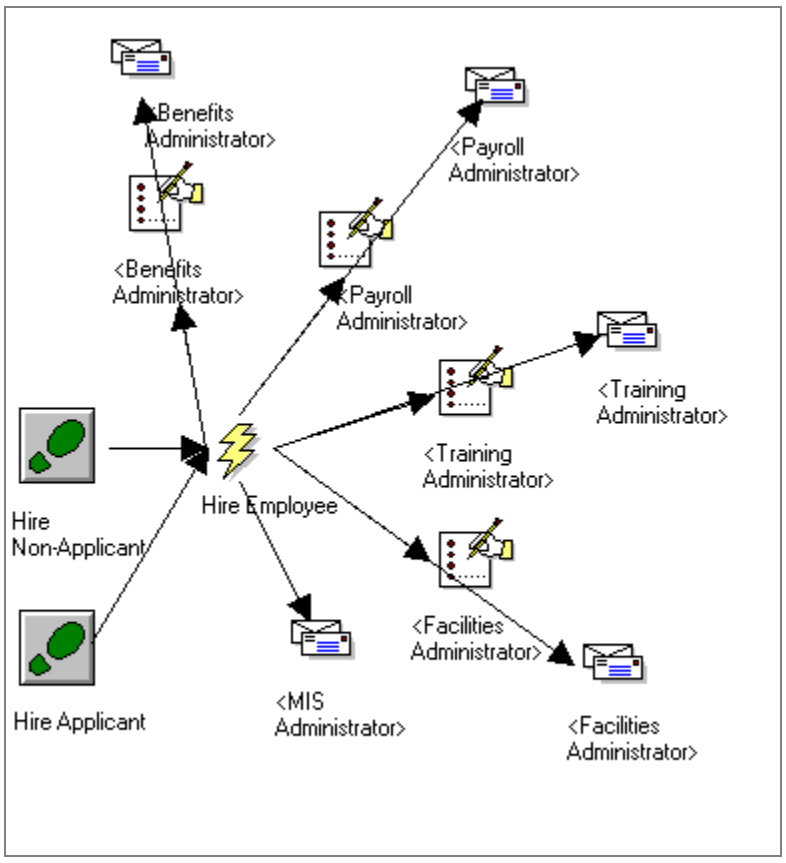
When you design a workflow in PeopleSoft Human Resources using PeopleSoft Application Designer, you create maps for your business process. These maps provide an overview of the workflow at a glance, detailing your organization's business processes, identifying events that trigger a workflow, and specifying roles for notifying, reviewing, and approving workflow events. We include a process flow diagram for each Human Resources business process workflow that is included in your PeopleSoft Human Resources system.

PeopleSoft Application Designer provides a graphical mapping of all of your organization's business processes and related workflows. To see what's happening in any workflow, view it in PeopleSoft Application Designer.

Using Workflow to Hire Employees

Hiring employees can be time-consuming and involve several individuals in your organization. One person hires the employee into your PeopleSoft Human Resources system; another signs up the employee for benefits; and another gathers information to ensure that 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 items for you automatically. You hire an employee into PeopleSoft Human Resources, and PeopleSoft Workflow completes the process behind the scenes. The following diagram illustrates the Hire Employee workflow:



Hire Employee workflow

Where to Find the Hire Employee Workflow

Activity	Hire Employee
Event	Hire Employee
Business Process Map(s)	The Hire Employee workflow is in the Administer Workforce and the Recruit Workforce business process maps in PeopleSoft Human Resources.

Following is a breakdown of the Hire Employee workflow into its component rules, roles, and routings:

Rules

The business event, Hire Employee, is triggered when a new employee is hired. The entire Hire Employee business process takes place within this one event.

Once rules are established, they direct the system to send notification about the new hire to roles within the organization.

Roles

- Benefits Administrator
- Payroll Administrator
- MIS Administrator
- Training Administrator
- Facilities Manager

While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed.

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 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.

See Also

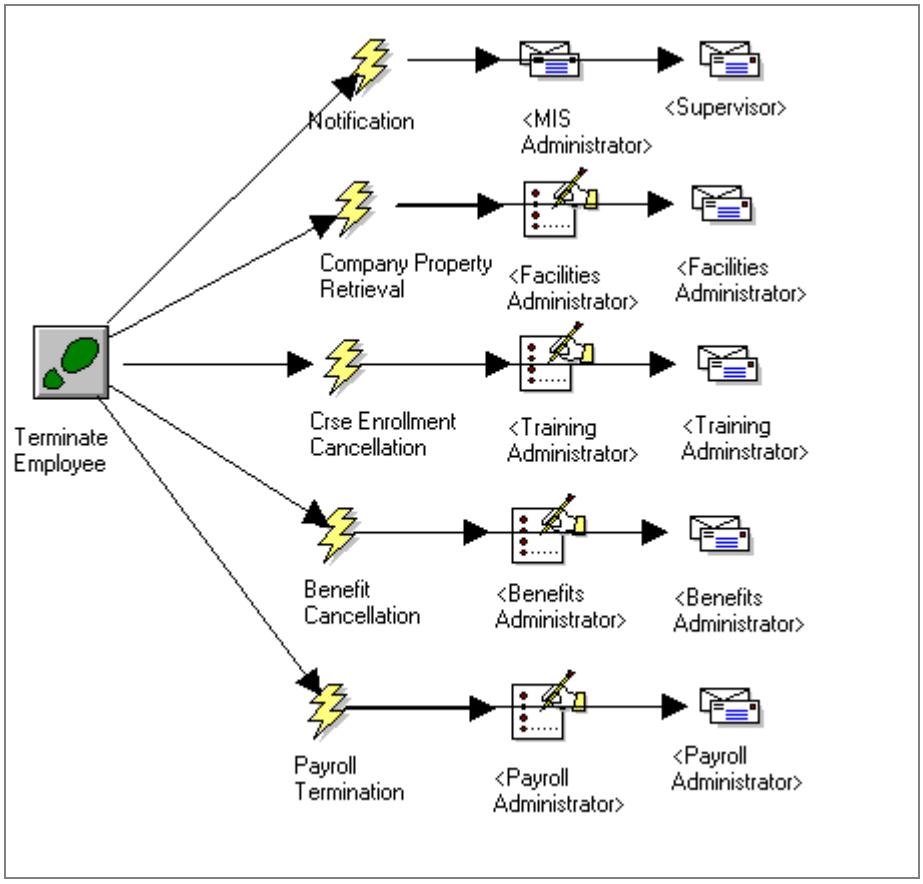
PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

Using Workflow to Terminate Employees

The Terminate Employee workflow streamlines the termination process and makes sure that you process a terminated employee according to your company's business procedures. By coordinating work between the appropriate administrators, PeopleSoft Workflow ensures that you take the correct actions in response to the employee's change in status.

When a user terminates an employee on 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 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 diagram illustrates the Terminate Employee workflow:



Terminate Employee workflow

Where to Find the Terminate Employee Workflow

Activity Terminate Employee

Event(s)

- Notification
- Company Property Retrieval
- Crse Enrollment Cancellation (course enrollment cancellation)
- Benefit Cancellation
- Payroll Termination

Business Process Map(s) The Terminate Employee workflow is in the Administer Workforce business process map in PeopleSoft Human Resources.

Following is a breakdown of the Terminate Employee workflow into its component rules, roles, and routings:

Rules

- The Business Event, Benefit Cancellation is triggered when a terminated employee is enrolled in a benefit program.
- The Business Event, Company Property Retrieval is triggered when a terminated employee has company property that was issued but not returned.
- The Business Event, Crs Enrollment Cancellation is triggered when a terminated employee is 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 (for example, email).
- The Business Event, Payroll Termination is triggered when a terminated employee should be issued another paycheck by PeopleSoft Payroll for North America.
- The Business Event, Supervisor Notification is triggered when an employee is terminated. No further verification is done.

Once rules are established, they direct the system to send email or generate worklists for role users when an employee is terminated.

Roles

- Benefits Administrator
- Payroll Administrator
- MIS Administrator
- Training Administrator
- Facilities Manager
- Supervisor

While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed. If no email ID, form ID, or operator ID is indicated, PeopleSoft Workflow cannot generate the appropriate emails, electronic forms, and worklists.

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.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information"

Using Workflow to Process Employees With Late Reviews

Processing employee reviews in a timely manner can be challenging. Notifying supervisors, making sure that they have the appropriate forms, and ensuring that they review their employees on time requires planning and coordination between human resources and every department in your organization. Using PeopleSoft 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. The email contains the name of the employee and the date that the review was due. The system generates a worklist for the personnel administrator with a directive to enter the review into the system once the supervisor has routed the review to the employee.

Where to Find the Process Employees With Late Reviews 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 PeopleSoft Human Resources.

Following is a breakdown of the Process Employees With Late Reviews workflow into its component rules, roles, and routings:

Rules

- The database agent Find Employees With Late Reviews finds all employees whose next review date has passed.
- The employees are 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 PeopleSoft Process Scheduler on the Plan Salaries, Process menu bar.

Once rules are established, they direct the system to send email or generate worklists for role users when an employee has missed a review.

Roles

- Supervisor

While different individuals in your organization can fill this role, the role must be assigned to an individual role user if the rules and routings are to be followed. If you haven't indicated an employee ID and email ID, the appropriate emails and electronic forms cannot be generated by workflow.

Routings

Role	*Email Sent?*	*Worklists Generated?*
Supervisor	Yes	Yes. The system directs the Supervisor to the Create Employee Review activity.

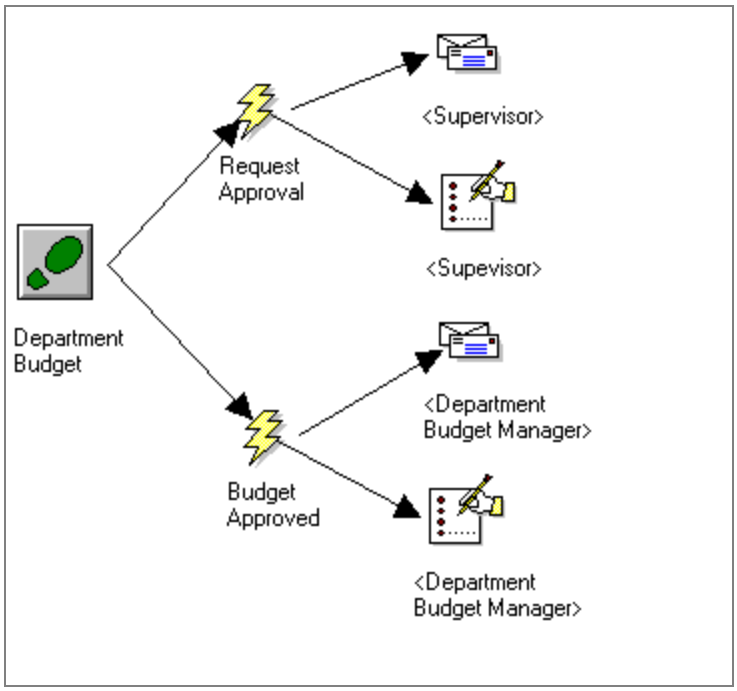
See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Overview of Salary Planning"

Using Workflow to Maintain Department Budgets

Updating and maintaining salary budgets for departments in an organization can be time-consuming and intensive, involving many levels of managers and administrators. The Maintain Budgets Workflow streamlines this process by handling routing budget change

requests and budget approvals for departments. PeopleSoft Workflow ensures that your organization's budget approval rules are followed and that the proper supervisors and managers approve any changes in budgeting. The following diagram illustrates the Maintain Budgets workflow:



Maintain Budgets workflow

Where to Find the Maintain Budgets 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.

Following is a breakdown of the Maintain Budgets workflow into its component rules, roles, and routings:

Rules

- This business event is triggered when the department budget manager requests a department budget change by clicking the Request Approval button on the Group Increase Budget - Budget Requested page.

Note. If workflow is not turned on, the Request Approval button doesn't appear in the Group Increase Budget - Budget Requested 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 can be made for employees in the affected department.

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.

Roles

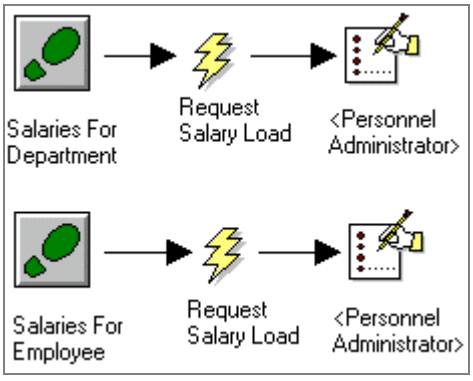
- Department Budget Manager
- Supervisor of the Department Budget Manager

Routings

Role	*Email Sent?*	*Worklists Generated?*
Supervisor	Yes	Yes. The system directs the supervisor to the Maintain Budgets activity.
Department Budget Manager	Yes	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 PeopleSoft Workflow. When you evaluate and request changes for employees, either individually, or by department, the system routes a worklist to the personnel administrator to approve or deny the proposed salary changes. The following diagram illustrates the Change Salaries workflow:



Change Salaries workflow

Where to Find the Change Salaries 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.

Following is a breakdown of the Change Salaries workflow into its component rules, roles, and routings:

Rules

- The business event is triggered when an authorized user clicks the Request Load button after manually entering salary changes Salary on the Salary Planning by Group pages.

Note. If workflow is not turned on, the Request Load button doesn't appear on these pages.

- The system creates a worklist for the Personnel Administrator to perform final approval and to load the salaries, if they are approved.

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 (salary plan department) or the Salary Plan Employee pages.

Roles

- Personnel Administrator

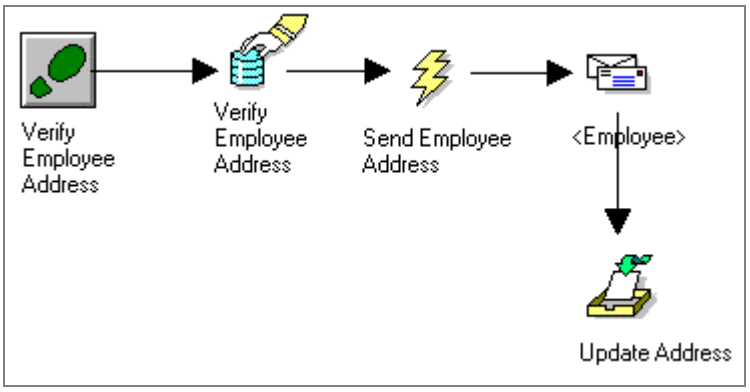
Routings

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. PeopleSoft Workflow enables 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 the PeopleSoft Human Resources system.

A PeopleSoft message agent uses the new information to update the Personal Data tables. An employee can initiate the Verify Employee Address workflow by filling out an electronic form to update a change in address. An employee who updates an address completes the form and saves and mails the document. The following diagram illustrates the Verify Employee Address workflow:



Verify Employee Address workflow

Where to Find the Verify Employee Address 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 PeopleSoft Human Resources.

Following is a breakdown of the Verify Employee Addresses workflow into its component rules, roles, and routings:

Rules

To verify that your organization has the correct address information for its employees, PeopleCode puts these business rules into effect by processing the HR Verify Employee Address database agent. This database agent is in **Workflow Administrator, Process.** It finds all employees who are role users with email IDs.

Once rules are established, they direct the system to send email to role users when an employee's address changes.

Roles

- Employees

Any employee who is not designated as a role user with an email ID cannot participate in this workflow. If you haven't indicated an email ID, form ID, or operator ID for the role user, PeopleSoft Workflow cannot generate the appropriate emails and electronic forms.

Routings

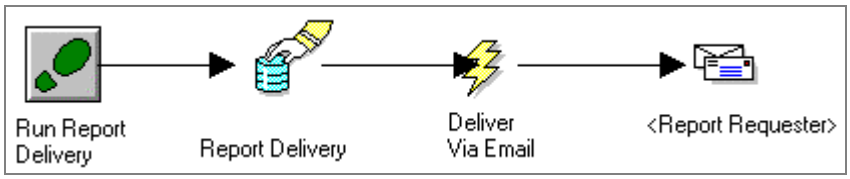
Role	*Email Sent?*	*Worklists Generated?*
Employee	Yes	No

Using Workflow to Deliver Reports

Using the Deliver Reports workflow, you can schedule your system to generate reports on a regular basis and to route the reports through email to role users for immediate review.

This workflow enables users to schedule multiple reports and have them emailed to role users. The workflow contains sample reports using the As of Date parameter across the PeopleSoft Human Resources system.

The following diagram illustrates the Deliver Reports workflow:



Deliver Reports workflow

Where to Find the Deliver Reports 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.

Following is a breakdown of the Deliver Reports workflow into its component rules, roles, and routings:

Rules

The reports are improvised when 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 regularly.

Roles

- Report Requester (any role user with an email ID)

Routings

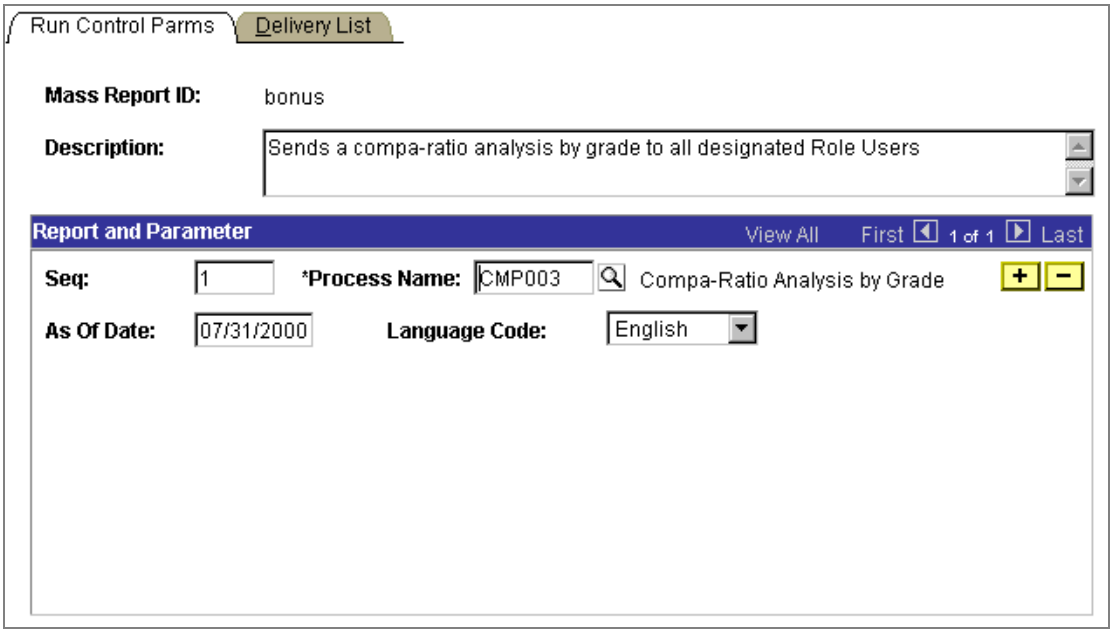
Role	*Email Sent?*	*Worklists Generated?*
Report Requester	Yes	No

Pages Used to Define a Mass Report

Page Name	Object Name	Navigation	Usage
As-Of-Date Mass Report - Run Control Parms (as-of-date mass report - run control parameters)	MASS_RPT_01_HR	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	Define a mass report. Do this before designating recipients.
As-Of-Date Mass Report - Delivery List	MASS_RPT_02_HR	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	Designate the role users who are to receive a copy of your report.

Defining a Mass Report

Access the As-Of-Date Mass Report - Run Control Parms page.



As-of-Date Mass Report - Run Control Parms page

Report and Parameter

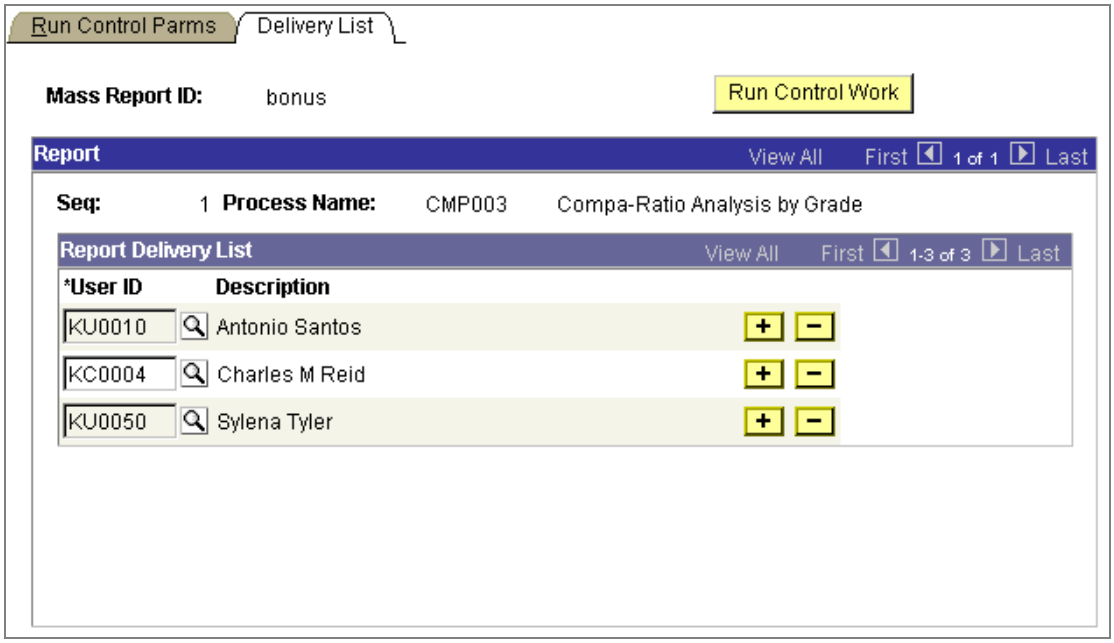
Seq (sequence number)	System-displayed.
Process Name	Select from the list of options.
As of Date	This date acts as part of the report's selection criteria: To report on data up to today's date, enter today's date.
Language Code	If the report is available in the language that you specify, the system prints it in that language. Otherwise, the report is printed in English. **Note.** The Language Code appears by default from the Base Language Code that you establish on the PeopleTools Options Table.

See Also

"Working With Languages"

Designating Role Users Who Receive the Report

Access the As-of-Date Mass Report - Delivery List page.



As-of-Date Mass Report - Delivery List page

In the **Report Delivery List** group box, enter each role user who is to be a recipient.

Scheduling Reports

Click the **Run Control Work** button to execute the Mass Reporting workflow process. The workflow generates the reports listed on the Run Control Parms page.

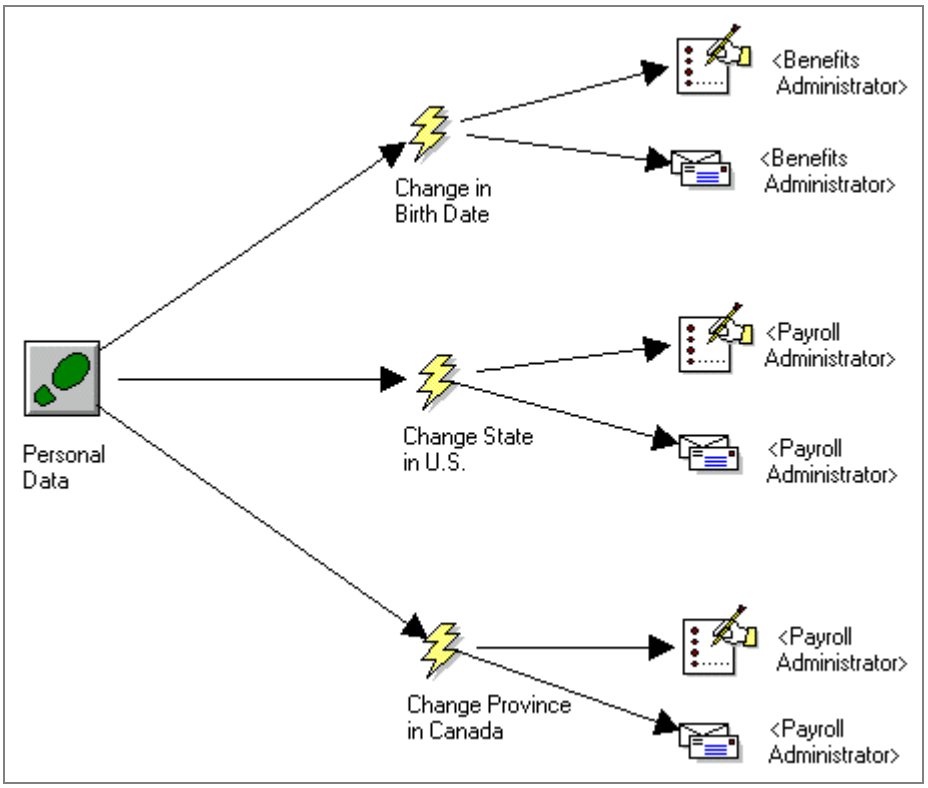
Generate the mass change reports on a dedicated Windows server. As workflow generates the reports, they collect on this server until the scheduled delivery date and time.

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 the reports for delivery.

To schedule reports for delivery, select **Workflow Administrator, Process, Database Agent**, run the process and select Report Delivery from the database agent list on the Process Scheduler Request page. We suggest that you schedule mass reports on a regular basis.

Using Workflow to Maintain Personal Data

The Maintain Personal Data workflow automates the process that you use to change employee birth date information and ensures that the payroll administrator is notified when U.S. employees change states or Canadian employees change provinces. The following diagram illustrates the Maintain Personal Data workflow:



Maintain Personal Data workflow

Where to Find the Maintain Personal Data 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.

Following is a breakdown of the Maintain Personal Data workflow into its component rules, roles, and routings:

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.

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.

Roles

- Benefits Administrator
- Payroll Administrator

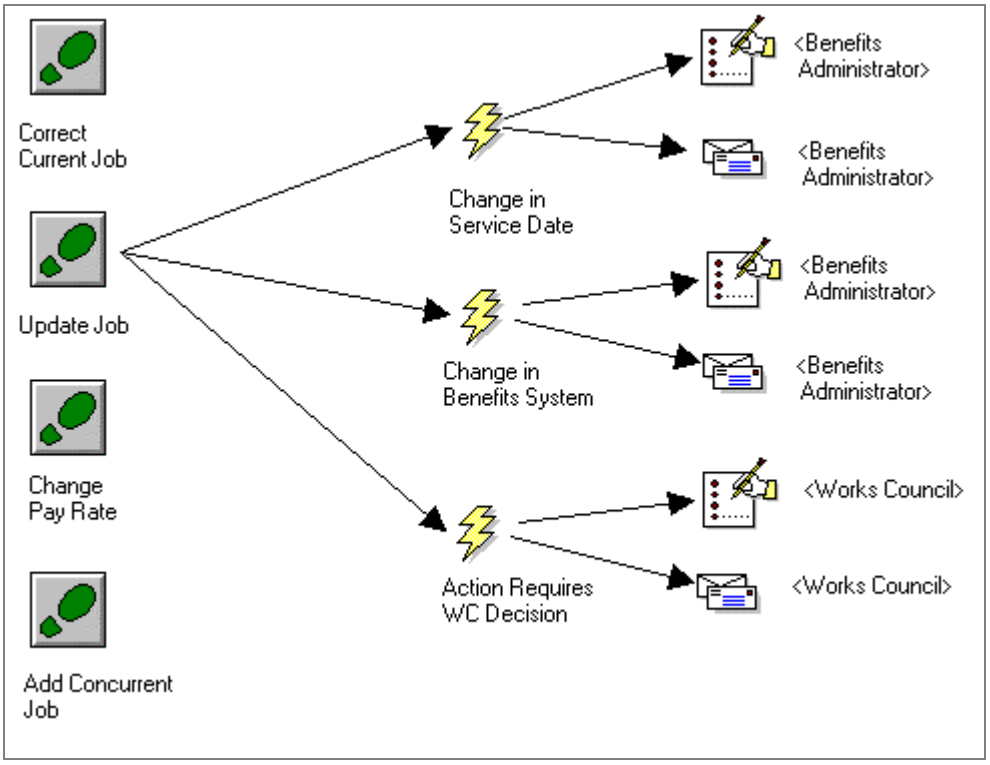
While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed. If you haven't indicated an employee ID and an email ID, PeopleSoft Workflow cannot generate the appropriate emails and electronic forms.

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 that you use to update employee service dates and change employee benefits programs. For a German workforce, this workflow also initiates the review of personnel actions by the German Works Council. The following diagram illustrates the Maintain Job Data workflow:



Maintain Job Data workflow

Where to Find the Maintain Job Data Workflow

Activity	Maintain Job 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.

Following is a breakdown of the Maintain Job Data workflow into its component rules, roles, and routings:

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.

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.

Roles

- Benefits Administrator
- Works Council Representative

While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed. If you haven't indicated an employee ID and an email ID, PeopleSoft Workflow cannot generate the appropriate emails and electronic forms.

Routings

Role	*Email Sent?*	*Worklists Generated?*
Benefits Administrator	Yes	Yes
Works Council Representative	Yes	Yes. The system directs the Works Council representative to the Works Council Decision inquiry page.

See Also

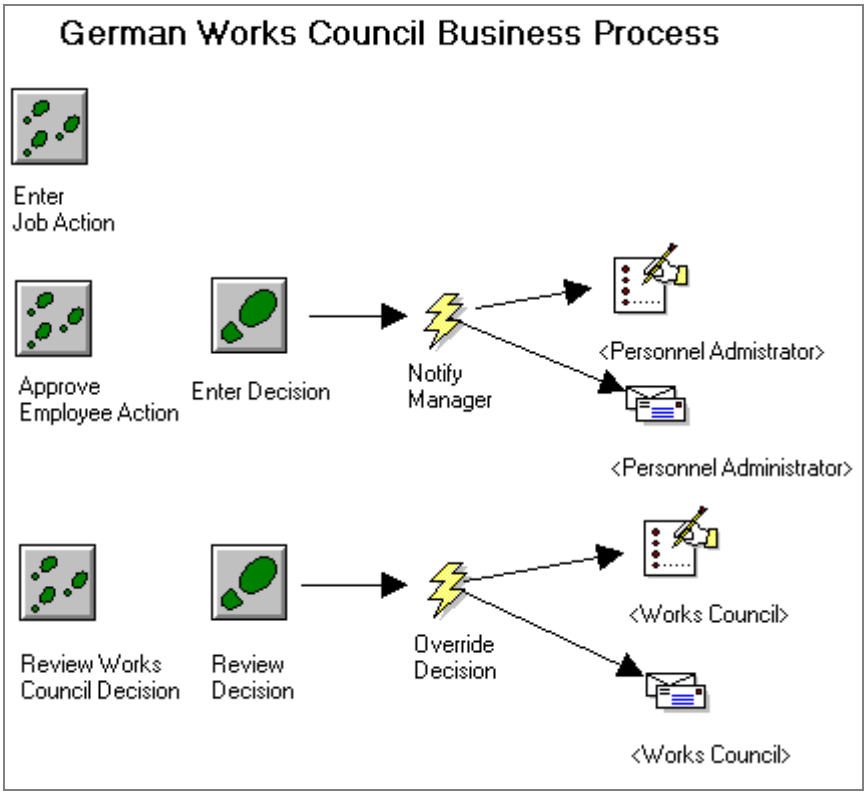
PeopleSoft Human Resources PeopleBook: Administer Workforce, "Managing Labor Relations," Overview of the German Works Council Business Process

Using Workflow to Review German Works Council Decisions

The German Works Council Decision workflow automates Works Council reviews of proposed personnel actions for German operations. The events that lead up to the workflow begin when a personnel action for a German employee who is 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, the member uses the Works Council Decision pages to review and respond to the personnel action. If the Works Council decides to change the proposed personnel action, then the workflow notifies the person in the Personnel Administrator role (usually the Human Resources manager) by sending an email and a worklist.

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:



German Works Council Decision workflow

Where to Find the German 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

Following is a breakdown of the German Works Council Decision workflow into its component rules, roles, and routings.

Rules

- 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

Role	*Email Sent?*	*Worklist Generated?*
Works Council representative	Yes	Yes

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

Following is a breakdown of the Employee Action workflow into its component rules, roles, and routings:

Rules

- The business event Notify Manager is triggered if the decision entered by the Works Council representative on the Works Council Decision page needs to be acted on by the Human Resources (HR) Manager.
- The HR Manager must be notified.

Role

Personnel Administrator (HR Manager)

Routing

Role	*Email Sent?*	*Worklist Generated?*
Personnel Administrator	Yes	Yes

CHAPTER 24

Generating Form Letters

This chapter provides an overview of form letters and tells you how to:

- Generate form letters.
- Set up standard letter codes.
- Preparing to print form letters.
- Adapt form letters to other tasks.

Before You Begin

You generate the sample form letters that are included with PeopleSoft Human Resources from PeopleSoft 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 that are delivered 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, use the information in this chapter to understand the steps that are involved in generating form letters. Then consult your report writer or word processor documentation to modify the procedures to fit the sample letters or use PeopleSoft Process Scheduler in PeopleSoft Human Resources to generate the letters.

Once you're familiar with the sample letters, you can modify the form letters (or create new ones) for other human resources tasks.

See Also

Adapting Form Letters

Understanding PeopleSoft Form Letters

Many human resources activities involve sending out routine letters and memos on a regular basis, for example:

- Letters acknowledging resumes, job postings, and job offers.

- Letters of rejection following interviews.
- Letters announcing course session enrollments, cancellations, and rescheduling.

The wording of such letters doesn't change much from mailing to mailing; what changes is information like names, addresses, and dates. In PeopleSoft Human Resources, you can create form letters in your word processor by accessing the data that you need from your human resources database.

Using Microsoft Word for Windows, PeopleSoft delivers sample form letters for these areas of human resources:

- Recruitment
- Training Administration
- 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. Two sample form letters are provided at the end of this chapter.

Note. To generate letters, you should be familiar with the Microsoft Word for Windows macro and mail merge functions. If you are not, see the *Microsoft Word for Windows User's Guide.*

How Form Letters are Generated

Before you generate any form letters or modify any of the sample form letters that are delivered with PeopleSoft Human Resources, you need to understand how the process works.

Following is an overview of the process for generating form letters:

1. To prepare for generating form letters, you tag records in the PeopleSoft Human Resources database that you want to extract data from. You do this by inserting a letter code into the records of applicants, employees, or non-employees.

   For example, when you enroll or add students to waiting lists for training courses, the system inserts letter codes into employee and non-employee records. You create letter codes in the Standard Letter Table.

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, the system won't extract data for letters that you've already printed.

3. Use Word for Windows to run the macros that merge the data extract files into form letter templates, one for each type of letter.

   To generate form letters using PeopleSoft Process Scheduler, PeopleSoft delivers these Word macros:

   - PRCSAPP004 (for job postings).
   - PRCSAPP007 (for Recruitment letters).
   - PRCSTRN001 (for Administer Training letters).
   - PRCSPER061 (for Manage Labor Relations letters).

   The PeopleSoft Human Resources system is delivered with two files containing the macros, STDLTR.DOT and STDLTR.95. The files which are in the \PS\WINWORD directory on your application CD:

   - The macros in STDLTR.DOT are for use with Word 97 (used in Microsoft Office 97) and are written in Visual Basic.
   - The macros in STDLTR.95 are for use with Word 7.0 (used in Microsoft Windows 95) and are written in Word Basic.

   Be sure to use the file that is appropriate for your system. If you need to use STDLTR.95, copy it to your system and rename it 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 letters of the same type in one file.

   The distributed architecture of your PeopleSoft Human Resources system means that your application server can be located far from your machine, so the system doesn't print letters to a default printer. Instead, you select where you want to print the letters using standard Word for Windows print options.

See Also

PeopleSoft Human Resources PeopleBook: Recruit Workforce, "Processing Applicants" Generating Recruitment Letters

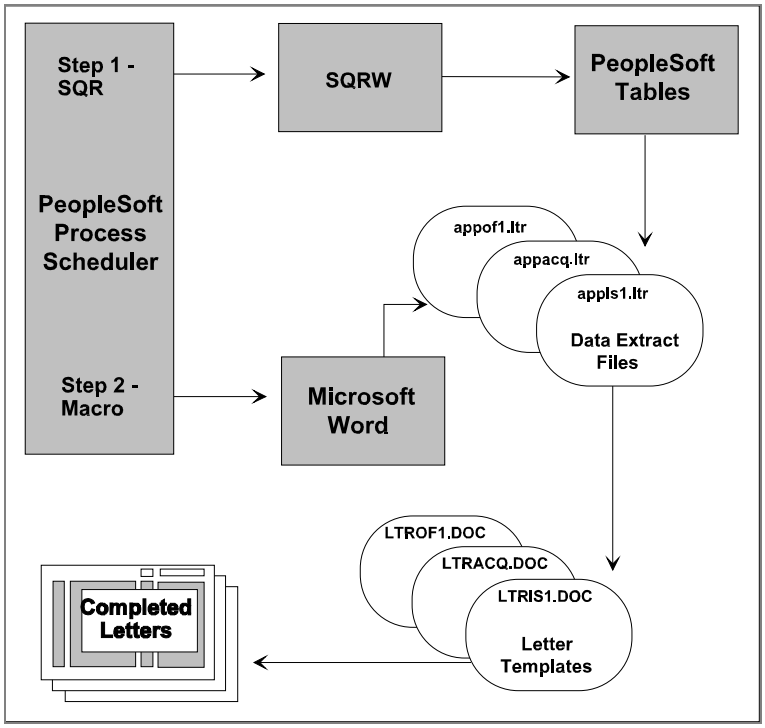
PeopleSoft Human Resources PeopleBook: Administer Training, "Enrolling or Waitlisting Students" Administering Training Letters

PeopleSoft Human Resources PeopleBook: Administer Your Workforce, "Managing Labor Relations"

Generating Form Letters With PeopleSoft Process Scheduler

PeopleSoft Process Scheduler performs steps 2 and 3 in the preceding procedure. You can run a job that performs each step in sequence or you can manually run each process in turn. If you manually run each process, you must perform the steps sequentially (first the SQR and then its corresponding macro) because PeopleSoft Process Scheduler can't call up the report writer and the word processor simultaneously. Also, the data extract file that is created by the SQR must exist before the Word macro starts.

The following diagram illustrates generating form letters using PeopleSoft Process Scheduler:



Generating form letters using PeopleSoft Process Scheduler

SQR 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.
- Retrieves the information from the records.
- Creates data extract files in the TEMP director that is defined in the macro.
- Updates the Print Date field in applicant records.

The data extract files have names with 3-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.

The macro PRCSAPP007:

- Opens the form letter templates that correspond to the data extract files.
- Merges the appropriate extract file data into the field codes for each template.

  For offer letters, the template is called LTROF1.DOC and it includes field codes for names, addresses, and offer amounts.

- 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. Use the same naming conventions for the new form letter components that you create.

Letter Codes

You create Letter Codes in the Standard Letter Table. The standard letter codes that are delivered by PeopleSoft for use with the sample letters are listed in this table.

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 to the letter code that is used. 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 sample Word letter templates begin with the letters *LTR*. This prefix identifies the document to the macro that automates the form letter generation. The next three characters indicate the type of letter that you are generating. These characters must match the letter code in PeopleSoft Human Resources. Word for Windows assigns the extension .DOC to all documents.

Here are the letter codes and their 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

Purpose of Letter	*Letter Code*	*Data Extract File*	*Word Letter Template*
Acknowledgment of resume receipt	ACQ	APPACQ.LTR	LTRACQ.DOC
No current opening letter	ANO	APPANO.LTR	LTRANO.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

Note. The Standard Letter Table also contains two codes, WTC and WTS, that are used in Administer Training for students on waiting lists. However, these codes don't have macros or sample letters associated with them.

See Also

Adapting Form Letters

Setting Up Standard Letter Codes

Each standard letter is represented by a code that you enter on pages to generate a form letter. The Letter Code field is used in Recruit Workforce, Administer Training, and Manage Labor Relations.

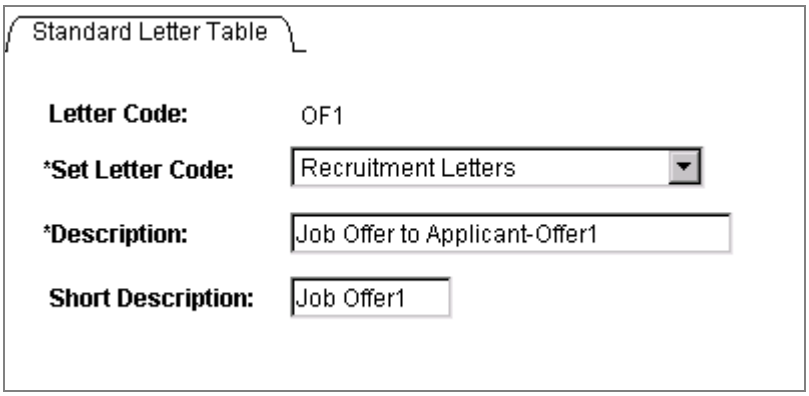
This section explains how to set up codes for your standard letters and print a report of the codes that you have set up in the Standard Letter Table.

Page Used to Set Up Standard Letter Codes

Page Name	Object Name	Navigation	Usage
Standard Letter Table	STANDARD_LTR_TABLE	Develop Workforce, Administer Training (GBL), Setup, Standard Letter Table, Standard Letter Table Develop Workforce, Recruit Workforce (GBL), Setup, Standard Letter Table, Standard Letter Table	Define your letter codes.

Setting Up Standard Letter Codes

Access the Standard Letter Table page.



Standard Letter Table page

PeopleSoft delivers letter codes for the sample letters that are supplied as standard. You can add your own codes to generate other form letters.

Set Letter Code Select a code from the available options. This code is used to group similar letter codes, making it easy for you to find the code that you want. Options are:

Customer Letters: Select this option if you have created letters for your organization that don't fit into any other category.

Employee Review Letters: For employee review letters.

Manage Labor Relations: For labor relations letters. Standard disciplinary and grievance letters are discussed in the *PeopleSoft Human Resources: Administer Workforce PeopleBook.*

Recruitment Letters: For recruitment letters and job postings.

Training Letters: For training letters.

The system uses the **Set Letter Code** field to determine which letter codes to list for the Letter Code fields. For example, on a recruitment page, the list of options includes only letter codes with a set letter code of ***Recruitment Letters.***

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.

See Also

Generating the Standard Letter Table Report

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file. Depending on your configuration, you may need to make the following changes to the standard Word for Windows macros that are supplied by PeopleSoft:

- Default path to the EMPTY.DOC file that contains all the macros.
- Location of the letters produced.

The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Word for Windows, you print them to your local printers.

To set up your system to print form letters:

1. Set up a shared directory on your machine for the letters.

   This enables the application server to add the letters to the directory. For example, if you're the training administrator, you may share the C:\TEMP directory on your machine as TRNTEMP.

   For the Recruit Workforce and Manage Labor Relations letters, set up subdirectories for each language that you run the letters in. For example, if you run letters with the Language field set to English, you create the directory C:\TEMP\ENG. See your system administrator if you don't know how to set up shared directories.

2. Update the macros with the location of your EMPTY.doc file and the location of your shared directory.

   For example, if you are the training administrator, edit the macro PRCSTRN001.

   In that macro, you replace the following line:

```
WordBasic.Call "FuncLib.MergeWild", "C:\TEMP", "TRN*.LTR", "C:\HR800\WINWORD",
"LTR*.DOC", "C:\TEMP"
```

   With this line:

```
WordBasic.Call "FuncLib.MergeWild", "C:\TEMP", "TRN*.LTR",
"C:\<path>\WINWORD", "LTR*.DOC", "\\<machine_name>\TRNTEMP"
```

   Where:

   <path> is the path to the directory that contains empty.doc

   <machine_name> is the machine name that is assigned to your computer.

3. Define the WINWORD variable in your Process Scheduler Configuration file.

   WINWORD defines the location of the Word for Windows executable file that the process scheduler runs to produce the form letters. For example, if Word for Windows is run on the application server, you might have this line in the process scheduler configuration file:

```
WINWORD=C:\APPS\OFFICE97\OFFICE
```

See Also

PeopleSoft Process Scheduler PeopleBook, "Process Scheduler Administration," Editing Process Scheduler Configuration File

Modifying the Word Macros for the Sample Letters

Adapting Form Letters

Form letters are useful for many administrative tasks besides those for which we deliver sample letters. You can modify the sample form letters in several ways, from simple changes to text in the templates to adding the Letter Code field to other pages in PeopleSoft Human Resources. At the very least, 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.

This section describes how to adapt form letters, as follows:

- Modify the Word for Windows macros for the sample letters; for example, change the PATH statements to match your environment.
- Change the text in sample form letters so that it suits your organizational needs; for example, change the author name and title.

- Extract values from other fields in PeopleSoft Human Resources and insert them into the form letter templates; for example, add a currency code field to the job offer letter.
- Create new form letters for different purposes; for example, to notify applicants of interview appointments.
- Add the Letter Code field to other pages in PeopleSoft Human Resources and create form letters for them. For example, 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 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 need to modify the PATH to reflect the correct locations.

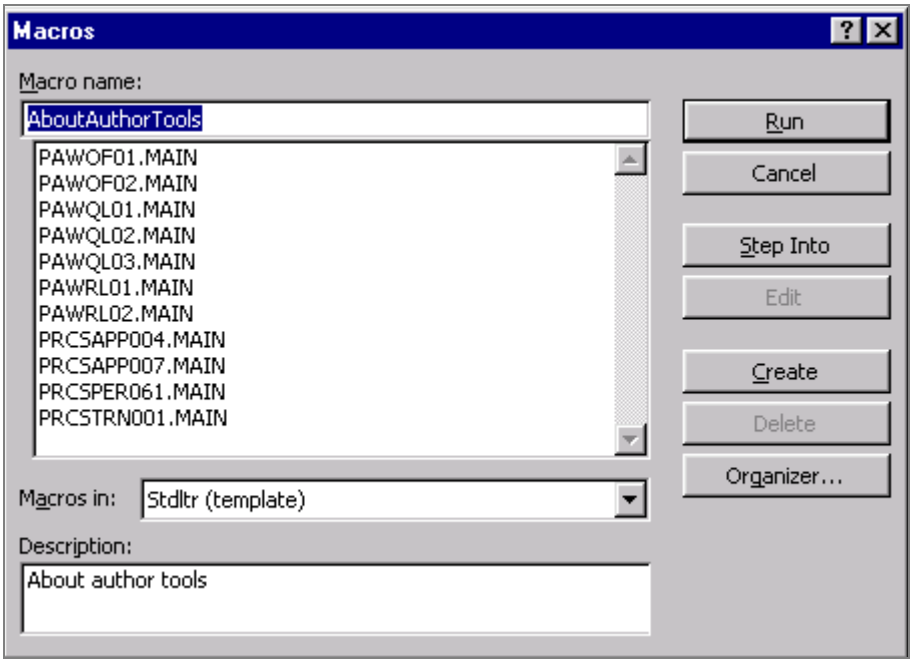
Before you edit the existing macros (or create new ones), we recommend that you print copies of the Word for Windows documents and macros and the report writer SQRs, and study them carefully.

Note. To make this change, you should be familiar with Microsoft Word for Windows templates and macros, and your report writer.

All the macros are attached to a file in the \PS\WINWORD directory. (Your path may differ, depending on your installation, but you can always find the file in a WINWORD subdirectory.) They are attached to an empty Word for Windows file called EMPTY.DOC.

To modify a macro:

1. In Microsoft Word, open the file EMPTY.DOC.
2. Select Tools, Macro.
3. In the Macros in field, select Stdltr (template).



Macros page

4. Highlight the macro to modify and click **Edit.**

Note. Macro names that begin with *PAW* are used in PeopleSoft Pension Administration.

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting, "PeopleSoft Reporting Tools, " Structured Query Reports (SQRs)

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft Human Resources contain sample text for different types of tasks, which you can change to suit your 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 you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, follow the procedure below.

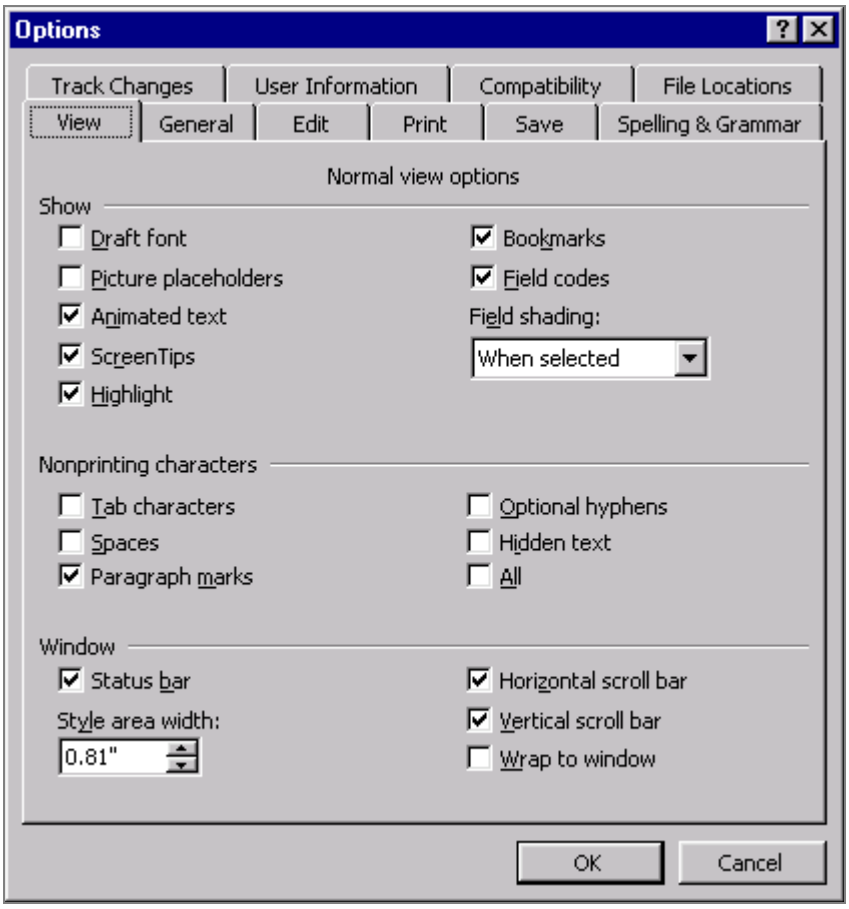
To modify the text in a form letter:

1. Find the Word letter template to update.

   Templates are listed in Naming Conventions for Form Letter Files and are located in the directory \PS\WINWORD.

2. In Microsoft Word for Windows, open the document to modify.

If you see “ “ in the document, select Tools, Options; then select the Field codes check box.



Options page

3. Make changes to the text as you would in any other document, and save the file.

   In the example letter below, we changed the author from Barbara Smith, Employment Coordinator to Jay Ferreira, Recruitment Specialist.

Warning! Don’t overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that extracted from PeopleSoft Human Resources.

{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

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.

Note. 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 that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all the fields that you want to use and writes them to the appropriate data extract files.

   For example, to include currencies in the job offer letter LTROF1.DOC, add a Currency field code to the form letter template. 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"
```

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting, "PeopleSoft Reporting Tools, " Structured Query Reports (SQRs)

Creating New Form Letters

You can create 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.

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.

   You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.

   For example, create a form letter for interview schedules *(INT)* by adapting the offer letter template. In the directory \PS\WINWORD, open LTROF1.DOC. Modify the text as needed and add any new field codes that you want to use in the letter. Save the new template under a different name, LTRINT.DOC.

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, to create a new form letter for interview schedules, you 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.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see Introduction to PeopleSoft Reporting**.**

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting, "PeopleSoft Reporting Tools, " Structured Query Reports (SQRs)

PeopleTools PeopleBook: Process Scheduler

Microsoft Word for Windows User's Guide

Adding Letter Code Fields to Pages

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 can add the Letter Code field to one of the pages from the Plan Careers menu.

Note. To make this change, you should be familiar with PeopleSoft Application Designer; Microsoft Word for Windows field codes, macros, and data statements and the SQRs that are used to extract data values from your PeopleSoft Human Resources database.

When you add the Letter Code field to another page and its underlying table or tables in the system, also create:

- A letter code that represents the particular module.
- A form letter template with the appropriate text, field codes, and data statements.
- An SQR that extracts data from the correct tables in PeopleSoft Human Resources and creates new data extract files.
- A Word for Windows macro.

Note. To link the new SQR and Word macro to PeopleSoft Process Scheduler, ask your human resources project leader or see Introduction to PeopleSoft Reporting.

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting, "PeopleSoft Reporting Tools, " Structured Query Reports (SQRs)

PeopleTools PeopleBook: Process Scheduler

Sample Form Letters

In this section are two sample letters: a confirmation of enrollment letter used in Administer Training and resume acknowledgment letter used in Recruit Workforce.

Training Letter Sample

August 10, 2001

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, 2001

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 25

Understanding Enterprise Integration Points in HRMS

This chapter provides an overview of enterprise integration points in PeopleSoft HRMS and lists:

- HRMS EIPs that publish only.
- References to documentation of enterprise integration points throughout PeopleSoft HRMS PeopleBooks.

Overview of Enterprise Integration in PeopleSoft HRMS

PeopleSoft uses enterprise integration points (EIP) to integrate HRMS applications with:

- Other applications within PeopleSoft HRMS.
- PeopleSoft applications outside of HRMS.
- Third-party applications.

EIPs employ a variety of technologies.

Activating Messages and Channels

With the exception of PERSON_BASIC_SYNC and WORKFORCE_SYNC messages, EIP messages available in PeopleSoft HRMS are delivered inactive. In PeopleTools Application Designer, activate the messages that your organization uses.

- Set the status of each selected message to *Active.*
- Set the status of the corresponding message channel to *Run.*

See Also

PeopleSoft Enterprise Integration PeopleBook

Understanding HRMS EIPs that Publish Only

Many of the Human Resources Enterprise Integration Points publish only.

When data is added, deleted, or modified in a record that contains an EIP that publishes only, the EIP publishes that data to any other PeopleSoft or third-party application that subscribes to it. However, if the component does not have the same record structure as the message, the data is not published. If the component does have the same record structure at level 0 and level 1, any data in the records that match between the message and the component is published.

Adding Components and Batch Processes

Publish is initiated by the SavePostChange peoplecode on the record.

- Adding Components.

  If you add or have added any additional components that update the records related to EIPs listed in the following section, you do not have to modify them to publish the message. However, any customization made using these records will still need to be tested to make sure that the data is being published correctly.

- Adding Batch processes.

  If you add or have added additional batch processes that update the record, you must add your own batch publishes to initiate the publish because the batch processes will not run the SavePostChange peoplecode on the record.

See Also

PeopleSoft Enterprise Integration PeopleBook

HRMS EIPs that Publish Only

PeopleSoft Human Resources uses Application Messaging technology in the following EIPs, which are listed by the general business process that they support:

Setup Data Synchronization

EIP Name	*Related Records*
Company Property	COMP_PROP_TBL
Company Table	COMPANY_TBL, COMPANY_TBL_ITA, COMP_CCC_TBL, COMP_PENS_FRA, COMP_PHONE_TBL,
Country Table	COUNTRY_TBL
Market Rates Data	RT_INDEX_TBL, RT_TYPE_TBL, RT_RATE_DEF_TBL, CURR_QUOTE_TBL, RT_RATE_TBL
Product Chartfield Table	PRODUCT_TBL
Table Set Control	SET_CNTRL_TBL, SET_CNTRL_GROUP, SET_CNTRL_REC, SETID_TBL

Create Framework for Human Resources Management

EIP Name	*Related Records*
Accomplishment Cluster	RS_CLUSTER_ACMP
Action/Reason Table	ACTN_REASON_TBL
APE Industry Codes Table – France	APE_INDSTRY_FRA
Bank Table	BANK_EC_TBL, BANK_BRANCH_TBL
Business Unit Table HR	BUS_UNIT_TBL_HR
Competency Table	COMPETENCY_TBL, COMPETENCY_TYPS, ACCOMP_TBL, MAJOR_TBL,
Competency Cluster	RS_CLUSTER_COMP
Competency Type	RS_TYPE_TBL
Contract Table – Belgium	CNT_END_TBL_BEL, CNT_RSN_TBL_BEL
Department Table	DEPT_TBL
Frequency	FREQUENCY_TBL
Holiday Dates	HOLIDAY_DATE
Industry Inspection Table – Germany	INDUST_INSP_GER
Job Family	JOB_FAMILY_TBL
Job Code Table	JOBCODE_TBL, CAN_JOBCODE_CU, JBCD_CMP_RT2_VW, JBCD_CMP_RT3_VW, JOBCD_TRN_PROG
Labor Category Tables	TARIFF_AREA_GER
Labor Relations	SPK_COMM_GER, WRKS_CNCL_LCL
Location Table	LOCATION_TBL
Name Prefix/Suffix Tables	NAME_PREFIX_TBL, NAME_SUFFIX_TBL, NM_ROYPREF_TBL, NM_ROYSUFF_TBL
Nations Duvo Table – Germany	NATIONS_DUEVO
Occupational Illness Table – France	OCC_ILLNESS_FRA
Position Data	POSITION_DATA
Rating Description	RS_RATING_DESCR
Regulatory Region Table	REG_REGION_TBL
Role Accomplishments	RS_ROLE_ACCOMPS
Role Cluster	RS_CLUSTER_TBL
Role Competency / Accomplishment	RS_ROLE
Role Competencies	RS_ROLE_COMPS

EIP Name	*Related Records*
Salary Structure WFA	SAL_GRADE_TBL, SAL_STEP_TBL, SAL_RATECD_TBL
School Table	SCHOOL_TBL
Special Projects	PERSON, SPECL_PROJECT
Statute Tables – Belgium	STATUTE_TBL_BEL, SUBSTAT_TBL_BEL
Union Table	UNION_TBL
Visa Permit	VISA_PERMIT_TBL, VISA_PERMIT_SUP
Workforce Data	EMPLOYMENT, BEN_PROG_PARTIC, JOB, COMPENSATION, JOB_EARNS_DIST, JOB_JR,

Track Employee Information and Changes

EIP Name	*Related Records*
Person Accomplishments	PERSON, ACCOMPLISHMENTS
Person Company Property	PERSON, COMP_PROP
Person Competency	PERSON, CM_EVALUATIONS, COMPETENCIES
Person Contract	PERSONAL_DATA, CONTRACT_DATA, CNT_PROBATION, WKF_CNT_TYPE, WKF_CNT_CLAUSE
Person Contract – Belgium	EMPLOYMENT, CONTRACT_BEL, CONTR_ENDS_BEL, CONTR_REPS_BEL
Person Credit Card	CC_CARD_TBL_EX, CC_CARD_DATA_EX
Person Disability	DISABILITY, ACCOM_REQUEST, ACCOM_DIAGNOSIS, ACCOM_JOB_TASK, ACCOM_OPTION, DISABILITY_CHE, DISABILITY_FRA, DISABILITY_GER,
Person Diversity	DIVERSITY
Person Education	SCHOOL_EDUCAT, EDUC_AREA_STUDY, RS_APP_MESSAGE
Person ID Change	PERSON, EMAIL_ADDRESSES, PERSONAL_PHONE, PERS_DATA_EFFDT, PERS_NID, NAMES, ADDRESSES
Person ID Delete	PERSONAL_DATA
Person Names	PERSON, NAMES
Person Prior Work Experience	PERSON, PRIORWORK_EXPER
Person Visa/Citizenship	PERSON, CITIZEN, CITIZEN_PSSPRT, VISA_PMT_DATA, VISA_PMT_SUPPRT

EIP Name	Related Records
Personal Data	PERSON, EMAIL_ADDRESSES, ERSONAL_PHONE, PERS_DATA_EFFDT, PERS_NID, NAMES, ADDRESSES

Create and Execute Compensation Structure

EIP Name	Related Records
Compensation Market rate	WA_MKT_RATE_TBL
Rating Model	RATING_MDL_TBL, REVW_RATING_TBL
Review Scale Tables	REVW_SCALE_TBL, REVW_FACTOR_TBL, REVW_FCT_PT_TBL
Salary Matrix	SAL_MATRIX_TBL, SAL_MATRIX_PCT
Salary Plan	SAL_PLAN_TBL
Salary Structure	SAL_GRADE_TBL, SAL_STEP_TBL, SAL_RATECD_TBL
Salary Structure WFA	SAL_GRADE_TBL, SAL_STEP_TBL, SAL_RATECD_TBL

See Also

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

Enterprise-Wide Table Synchronization by HRMS EIPs that Publish Only

The following EIPs are available to synchronizing data between tables that share the same table structure across PeopleSoft enterprise applications.

EIP Name	Related Records
Business Unit Table (HR)	BUS_UNIT_TBL_HR
Country Table	COUNTRY_TBL
Currency Code Table	CURRENCY_CD_TBL
Department Table	DEPT_TBL
GL Account Table	GL_ACCOUNT_TBL
Location Table	LOCATION_TBL
Market Rates Data	RT_INDEX_TBL, RT_TYPE_TBL, RT_RATE_DEF_TBL, CURR_QUOTE_TBL, RT_RATE_TBL
Product Chartfield	PRODUCT_TBL

EIP Name	*Related Records*
Project Table	PROJECT
State Table	STATE_TBL
Unit of Measure	UNITS_TBL, UNITS_CVT_TBL

See Also

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

Understanding Other HRMS Enterprise Integration Points

EIPs that support particular business processes are documented throughout PeopleSoft HRMS PeopleBooks.

PeopleSoft Human Resources

PeopleSoft Human Resources PeopleBook: Manage Variable Compensation, "Managing Awards Approval and Payout"

PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting, "Commitment Accounting Enterprise Integration Points with PeopleSoft Financials"

PeopleSoft Human Resources PeopleBook: Manage Professional Compliance, "Understanding and Setting Up Professional Compliance"

PeopleSoft Human Resources PeopleBook: *Recruit Workforce*, "Administering Employee Referral Programs"

PeopleSoft Payroll for North America

PeopleSoft Payroll for North America PeopleBook, "Administering Interfaces"

PeopleSoft Global Payroll

PeopleSoft Global Payroll PeopleBook, "Working With Interfaces"

PeopleSoft Stock Administration

PeopleSoft Stock Administration PeopleBook, "Administering Variable Compensation Grants," Integrating with Variable Compensation

PeopleSoft Time and Labor

PeopleSoft Time and Labor PeopleBook, "Using Time Collection Devices, "Receiving Time From a TCD"

PeopleSoft Time and Labor PeopleBook, "Integrating With PeopleSoft Financials"

PeopleSoft Time and Labor PeopleBook, “Appendix C: TCD Interface”

PeopleSoft Collaborative Applications

PeopleSoft eBenefits PeopleBook, ”Integrating With eBenX,” ”Integrating With GeoAccess ProviderSearch,” and ”Integrating With Discounts and Perks Suppliers”

PeopleSoft ePay PeopleBook, ”Enrolling in W-2 Import Program,” ”Integrating With TALX,” and ”Integrating With Discounts and Perks Suppliers”

PeopleSoft eRecruit and Resume Processing

PeopleSoft Resume Processing PeopleBook, ”Setting Up Resume Processing,” Understanding the Extraction Process

PeopleSoft eRecruit Manager Desktop PeopleBook, ”Making Applicant Pre-Employment Checks,” Understanding Pre-Employment Checks and "Administering Job Requisitions," Posting Job Openings to Online Job Boards

See Also

PeopleSoft Enterprise Integration PeopleBook

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

CHAPTER 26

Appendix: PeopleSoft Application Fundamentals for HRMS 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.

This appendix provides an overview of basic HRMS reports and enables you to:

- View summary tables of all reports.
- View report details and source records.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: Process Scheduler

PeopleSoft HRMS Reports: General Description

These tables list basic PeopleSoft HRMS reports as well as specific reports for PeopleSoft Human Resources business processes sorted by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

See Also

PeopleSoft HRMS Reports: A to Z

Basic HRMS Reports

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
CMP013 Update Seniority Pay Reporting	Lists employees and all their seniority changes. Run this report after you've run the Update Seniority Pay process (HR_CMP013) and before you run the Upd Seniority Pay – Load Data process (HR_CMP013_CI) to load the changes to Job.	Administer Workforce, Administer Workforce (GBL), Process, Update Seniority Pay, Update Seniority Pay	RUNCTL_SENPAY2
CMP014S Update Seniority Eligibility Reporting	Lists employees and all their seniority changes. Run this report after you've run the Update Seniority Eligibility process (HR_CMP014) and before you run the Upd Seniority Elig – Load Data process (HR_CMP014_CI) to load the changes to Job.	Administer Workforce, Administer Workforce (GBL), Process, Update Seniority Eligibility	RUNCTL_SENPAY
CMP015 General Compensation Update Report	Reports on all the changes performed by the General Compensation Update Process. Run this report after you've run the General Compensation Update process (HR_CMP015).	Administer Workforce, Administer Workforce, Process, General Compensation Update, Runctl Comp015	RUNCTL_CMP015
CMP016 Defaulting Rules Eligibility	Lists the employees eligible for the selected defaulting rules as of selected date.	Define Business Rules, Manage Human Resources (GBL), Report, Defaulting Rules Eligibility	RUNCTL_CMP016
FGPER802 Geographic Location Table report	Produces a detailing of the Geographic Location Table.	Define Business Rules, Manage Human Resources (USF), Report, Geographic Location Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FGPER803 Agency Table report	Prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date.	Define Business Rules, Manage Human Resources (USF), Report, Agency Table	PRCSRUNCNTL
FGPER804 Sub-Agency Table report	Prints all sub-agencies in the Sub-Agency Table and their associated agencies.	Define Business Rules, Manage Human Resources (USF), Report, Sub-Agency Table	PRCSRUNCNTL
FGPER805 Personnel Office ID Table report	Prints information about all Personnel Offices in your agency.	Define Business Rules, Manage Human Resources (USF), Report, Personnel Office ID Table	PRCSRUNCNTL
FGPER806 U.S. County Table report	Prints all counties with their associated two-digit county codes.	Define Business Rules, Manage Human Resources (USF), Report, U.S. County Table	PRCSRUNCNTL
FGPER807 Locality Pay Area Table report	Prints information for every Locality Pay Area.	Define Business Rules, Manage Human Resources (USF), Report, Locality Pay Area Table	PRCSRUNCNTL
FGPER808 LEO Pay Area Table report	Lists each LEO Special Pay Area and associated percentage.	Define Business Rules, Manage Human Resources (USF), Report, LEO Pay Area Table	PRCSRUNCNTL
FGPER809 State Table report	Prints a list of all the states and their numeric codes.	Administer Workforce, Administer Workforce (USF), Report, Award Action Data, State Table	PRCSRUNCNTL
FGPER811 Handicap Table report	Prints all disabilities and their associated codes.	Define Business Rules, Manage Human Resources (USF), Report, Handicap Table	PRCSRUNCNTL
FGPER812 Legal Authority Table report	Prints the information about the legal authorities you set up in the Legal Authority table.	Define Business Rules, Manage Human Resources (USF), Report, Legal Authority Table	PRCSRUNCNTL

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
FGPER813 Nature of Action Table report	Generates a detailing of the Nature of Action Table.	Define Business Rules, Manage Human Resources (USF), Report, Nature of Action Table	PRCSRUNCNTL
FGPER814 NOA Authority 1 report	Generates a detailing of the Nature of Action/Authority 1 Table.	Define Business Rules, Manage Human Resources (USF), Report, NOA Authority 1	PRCSRUNCNTL
FGPER816 Priority Placement Table report	Generates a detailing of the Priority Placement Table.	Define Business Rules, Manage Human Resources (USF), Report, Priority Placement Table	PRCSRUNCNTL
FGPER817 Work Location Table report	Prints a detailing of the Work Location Table.	Define Business Rules, Manage Human Resources (USF), Report, Work Location Table	PRCSRUNCNTL
FGPER823 USF Job Code Table report	Prints a list of all job codes and the date on which they become effective.	Define Business Rules, Manage Human Resources (USF), Report, Job Code Table Develop Workforce, Manage Positions (USF), Report, Job Code Table	PRCSRUNCNTL
GBP001 Group Member Overlap report	Shows when members belong to more than one group.	Define Business Rules, Manage Human Resources (GBL), Report, Group Member Overlap	RUNCTL_GBP001
GBP002 Group Membership report	Lists all the members in a particular group.	Define Business Rules, Manage Human Resources (GBL), Report, Group Membership Define Business Rules, Manage Human Resources (USF), Report, Group Membership	RUNCTL_GBP002

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PAY711 Pay Group report	Prints each pay group and its effective date along with the processing characteristics that apply to that group.	Define Business Rules, Manage Human Resources (USF), Report, Pay Group	PRCSRUNCNTL
PAY717 Pay Plan report	Prints a detailing of your pay plan definitions.	Define Business Rules, Manage Human Resources (USF), Report, Pay Plan	PRCSRUNCNTL
PER044 Multiple Seniority Components report	Runs the Multiple Seniority Components report.	Administer Workforce, Administer Workforce (GBL), Process, Update Seniority Eligibility, Update Seniority Eligiblity Administer Workforce, Administer Workforce (GBL), Report, Multiple Seniority Components, Multiple Seniority Components Administer Workforce, Administer Workforce (FPS), Report, Multiple Seniority Components	RUNCTL_SENPAY
PER701 Department Table report	Lists all departments by Department ID.	Define Business Rules, Manage Human Resources (GBL), Report, Department Table Define Business Rules, Manage Human Resources (USF), Report, Department Table	PRCSRUNCNTL
PER702 Installation Table report	Lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.	Define Business Rules, Define General Options, Report, Installation Table	PRCSRUNCNTL

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER705 Location Table report	Lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).	Define Business Rules, Manage Human Resources (GBL), Report, Location Table	PRCSRUNCNTL
PER707 Company Table report	Prints all companies in the Company Table and default information, including name and address, company code, and effective date.	Define Business Rules, Manage Human Resources (GBL), Report, Company Table	PRCSRUNCNTL
PER708 Country Table report	Prints a list all countries –character codes.	Define Business Rules, Define General Options, Report, Country Table	PRCSRUNCNTL
PER709A US Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for U.S.-based companies.	Define Business Rules, Manage Human Resources (GBL), Report Lcl, US Job Code Table	PRCSRUNCNTL
PER709B Can Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for Canada-based companies.	Define Business Rules, Manage Human Resources (GBL), Report Lcl, CAN Job Code Table	PRCSRUNCNTL
PER709C Job Code Table report	Prints a list of all job codes and the date on which they become effective.	Define Business Rules, Manage Human Resources (GBL), Report, Job Code Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER711 Standard Letter Table report	The Standard Letter Table report lists the codes in your Standard Letter Table.	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	PRCSRUNCNTL
PER713 Currency Code Table report	Prints information about each currency.	Define Business Rules, Define General Options, Report, Currency Code Table	PRCSRUNCNTL
PER714 Currency Rate Table report	Prints information about exchange rates.	Define Business Rules, Define General Options, Report, Currency Rate Table	PRCSRUNCNTL

Administer Training Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF182 (USF) SF182	Provides a standardized mechanism for generating SF182 reports to request, authorize, and detail estimates costs and billing as well as certify training programs for employees. (SQR)	Develop Workforce, Administer Training (GBL), Report, SF182, Runctl SF182	RUNCTL_SF182
MXSTP001 (Format) MXSTP002 (Reverse) (MEX) DC-1 Training Mixed Committee Constitution	Provides details about the formation of a training mixed committee and the establishment associated with the mixed committee.	Develop Workforce, Administer Training (GBL), Reports Lcl, MEX STPS DC-1 Format	RUNCTL_STP001

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
MXSTP003 (Format) MXSTP004 (Reverse) (MEX) DC-2 Training and Development Plans	Provides training and development plan information, including training objective priorities. Also provides the establishment associated with the mixed committee.	Develop Workforce, Administer Training (GBL), Reports Lcl, MEX STPS DC-2 Format	RUNCTL_STP003
MXSTP005 (MEX) DC-2B Training and Development Registration Application	Generates a Training and Development Registration Application report.	Develop Workforce, Administer Training (GBL), Reports Lcl, MEX STPS DC-2B Format	RUNCTL_STP005
MXSTP006 (MEX) DC-3 Courses/Events Certificates	Creates a Courses/Events Certificate.	Develop Workforce, Administer Training (GBL), Reports Lcl, MEX STPS DC-3 Format	RUNCTL_STP006
MXSTP007 (MEX) DC-4 Courses/Events Certificates List	Creates a Courses/Events Certificates list.	Develop Workforce, Administer Training (GBL), Reports Lcl, MEX STPS DC-4 Format	RUNCTL_STP007
MXSTP008 (Format) MXSTP009 (Reverse) (MEX) DC-5 Training and Development External Registration Application	Generates a Training and Development External Registration application and an instructor list.	Develop Workforce, Administer Training (GBL), Reports Lcl, MEX STPS DC-5 Format	RUNCTL_STP008
PER107GR (GER) Int. Prof. Education Status (internal professional education status)	Details the current status of employees who are enrolled in an internal education training plan. Includes only employees who selected the Intern check box and didn't select *Graduated* on the Professional Education page. (Crystal)	Develop Workforce, Administer Training (GBL), Report (Lcl), GER Int Prof Education Status	PRCSRUNCNTL

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER703 Course Table	Lists available courses, including course descriptions, type codes, locations, durations, and schools. You can use it to track internal courses and courses offered by outside vendors. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Table	PRCSRUNCNTL
TRN001 Training Letters	Creates training letters. (SQR, Word for Windows)	Develop Workforce, Administer Training (GBL), Report, Training Letters, Training Letters	RUNCTL_TRN001
TRN002 Course Session Roster	Lists the course name, session number, session start date, and all students who are enrolled in a course. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Session Roster, Course Session Roster	RUNCTL_TRN002
TRN003 Course Waiting List	Lists all students who are on the course or session wait list for a course. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Waiting List, Course Waiting List	RUNCTL_TRN003
TRN004 Training Schedule	Lists all course sessions that are scheduled within a given period. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Training Schedule, Training Schedule	RUNCTL_TRN004
TRN005 Training Facility Schedule	Lists all course sessions scheduled at a training facility during a given period. All sessions are listed by course start date. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Training Facility Schedule, Training Facility Schedule	RUNCTL_TRN005
TRN010 Active Scenario Summary	Summarizes approved training demands and budget information for a business unit. (SQR)	Develop Workforce, Budget Training (GBL), Report, Active Scenario Summary, Active Scenario Summary	RUNCTL_TRN010

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
TRN011 Global Scenario Summary	Provides a summary of approved training demands and budget information for the department or business unit retrieving the information from the selected global scenario. (SQR)	Develop Workforce, Budget Training (GBL), Report, Global Scenario Summary, Global Scenario Summary	RUNCTL_TRN011
TRN016 Target Course Certifications	Lists the license/certifications that students receive on successful completion of a course. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Target Course Certifications, Target Course Certifications	RUNCTL_TRN016
TRN017 Course Rating	Details ratings for sessions of a course. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Rating, Course Rating	RUNCTL_TRN017
TRN018 Course Attendance Status	Lists the attendance status of the students in a course. (SQR)	Develop Workforce, Administer Training (GBL), Report, Attendance Status, Course Attendance Status	RUNCTL_TRN018
TRN019 Course Rating Templates	Serves as the evaluation template to be completed by students enrolled in a course session. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Rating Templates, Course Rating Templates	RUNCTL_TRN019
TRN020 Student Training History	Lists the courses and sessions completed by a student. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Student Training History, Student Training History	RUNCTL_TRN020
TRN021 Training Program	Lists the training program for an employee. (SQR)	Develop Workforce, Administer Training (GBL), Report, Training Program, Course Attend. School Program	RUNCTL_TRN021

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
TRN022 Statistics of EEs Enrolled (statistics of employees enrolled)	Lists the employees who are enrolled in courses and lists course statistics by company, location, and department. (SQR)	Develop Workforce, Administer Training (GBL), Report, Statistics of EEs Enrolled, Course Statistics	RUNCTL_TRN022
TRN023 Course Description	Lists a course description. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Description, Course Description	RUNCTL_TRN023
TRN024 Course Category	Lists training catalog course categories. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Category, Course Category	RUNCTL_TRN024
TRN025 Course Equipment	Lists equipment needed for a course. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Equipment, Course Equipment	RUNCTL_TRN025
TRN026 Course Vendors	Lists vendors that are associated with a course on the Course Table. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Course Vendors, Course Vendors	RUNCTL_TRN026
TRN027 Prerequisite Courses	Lists prerequisite courses for a course. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Prerequisite Courses, Prerequisite Courses	RUNCTL_TRN027
TRN028 Target Qualifications	Lists competencies that the course aims to develop or improve. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Target Qualifications, Target Qualifications	RUNCTL_TRN028

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
TRN029 (FRA) Report Training 2483	Compiles results of calculation of the 2483 indicators for declaring vocational training of employees in French organizations. (Crystal)	Develop Workforce, Administer Training (GBL), Report Lcl, FRA Training Report 2483, Report Training 2483 Monitor Workplace, Report Regulations (FRA), Report, Training Report 2483, Report Training 2483	RUNCTL_TRN029
TRN030 Training Plan Summary	Lists all courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost; the number of people approved; and the total number of hours of training, which is calculated by multiplying the number of approved employees by the course duration. (SQR)	Develop Workforce, Budget Training (GBL), Report, Training Plan Summary, Training Plan Summary	RUNCTL_TRN030
TRN032 EE Sessn Cost Summary (employee session cost summary)	Lists the costs that are associated with an employee who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, employee expense, and session expense. (SQR)	Develop Workforce, Administer Training (GBL), Report, EE Session Cost Summary, EE Sessn Cost Summary	RUNCTL_TRN032
TRN033 Training Instructor Schedule	Lists the courses that an instructor is scheduled to teach during a given period. (Crystal)	Develop Workforce, Administer Training (GBL), Report, Training Instructor Schedule, Training Instructor Schedule	RUNCTL_TRN033

Report ID and Report Name	Description	Navigation	Run Control Page
TRN034 Equipment Checklist	Lists equipment that is required for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period. (SQR) Before running this report, set up the course session in the Course Session Table.	Develop Workforce, Administer Training (GBL), Report, Equipment Checklist, Equipment Checklist	RUNCTL_TRN034
TRN035 (FRA) Training Plan: Distribution	Details how a French organization's training demands are distributed by gender and professional category, such as executive, manager, office worker, qualified worker, and nonqualified worker. (SQR)	Develop Workforce, Budget Training (GBL), Rpt Lcl, FRA Trn Plan: Distribution, Training Plan: Distribution	RUNCTL_TRN035
TRN036 (FRA) Training Plan: Cost Details	Lists a French organization's training costs that are associated with each course. Details these cost types: facility, instructor, vendor, equipment, salary costs, and expenses. (SQR)	Develop Workforce, Budget Training (GBL), Rpt Lcl, FRA Trn Plan: Costs Detail, Training Plan: Cost Details	RUNCTL_TRN036

Administer Workforce Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CNT001 Contract Information	Lists all the contracts for the selected employee within the date range specified on the Contract Information page.	Administer Workforce, Administer Workforce (GBL), Report, Contract Information Administer Workforce, Administer Workforce (FPS), Report, Contract Information	RUNCTL_CNT001

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER801SG Employee Listing	Provides employee information based on the run control selections of Department, Employee Name, or Employee ID.	Administer Workforce, Administer Workforce (GBL), Report, Employee Listing Administer Workforce, Administer Workforce (FPS), Report, Employee Listing	RUNCTL_EMP_LIST
ES931 Print Wage and Separation	Prints an ES-931 Request for Wage and Separation Information report.	Administer Workforce, Administer Workforce (USF), Report, Print Wage and Separation	GVT_PRINT_ES931
FGHR015 Union Membership	(For U.S. federal government users) Lists each union organization and the employees who are members.	Administer Workforce, Manage Labor Relations (USF), Report, Union Membership	PRCSRUNCNTL
FGHR017 Personnel Actions History	Lists all employees affected by each of the job actions you enter. It prints the following information: employee name, department, effective date, and reason for the action. For each employee the report lists original hire date, total years of service, employee type, regular/temporary, full/part-time, job code and title, salary grade, compensation rate associated with the action, and supervisor's name.	Administer Workforce, Administer Workforce (USF), Report, Personnel Actions History	RUNCTL_PER015
FGPER810 Award Action Data	Generates an award type table report.	Administer Workforce, Administer Workforce (USF), Report, Award Action Data	PRCSRUNCNTL
FGSF61 Appointment Affidavits	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.	Administer Workforce, Administer Workforce (USF), Report, Appointment Affidavits	RUNCTL_FGSF61

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF75 Request for Prel Employ Data	Produces a Request for Preliminary Employment Data form.	Administer Workforce, Administer Workforce (USF), Report, Request for Prel Employ Data	RUN_CNTL_FGSF75
FGSF5052 Request for Personnel Action/Notice of Personnel Action	Prints the official Notification of Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.	Administer Workforce, Administer Workforce (USF), Report, Request for Personnel Action	RUNCTL_PAR
OHS002 Discipline Action Summary	Summarizes all disciplinary actions taken against employees within a specified date range. The report itemizes actions by date, by incident, and by employee.	Administer Workforce, Manage Labor Relations (GBL), Report, Discipline Action Summary	RUNCTL_OHS_FROMTO
OHS004 Grievance Detail	Lists the detailed grievance information for a formally filed grievance against the company.	Administer Workforce, Manage Labor Relations (GBL), Report, Grievance Detail	RUNCTL_OHS_NONE
OHS005 Employee Disciplinary Action	Lists the detailed disciplinary action information for specific employees.	Administer Workforce, Manage Labor Relations (GBL), Report, Employee Disciplinary Action	RUNCTL_OHS005
OHS006 Grievance Summary	Summarizes the grievances filed against the company, along with the associated actions and resolutions.	Administer Workforce, Manage Labor Relations (GBL), Report, Grievance Summary	RUNCTL_OHS_FROMTO

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER001 Department Action Notices	Lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices.	Administer Workforce, Administer Workforce (GBL), Report, Department Action Notices Administer Workforce, Administer Workforce (FPS), Report, Department Action Notices	PRCSRUNCNTL
PER001CH CHE Company Statistics	This report provides information on employee wages, occupations, and other data necessary for the Company Statistics Report (Betriebszaehlung).	Administer Workforce, Administer Workforce (GBL), Report Lcl, CHE Company Statistics	RUNCTL_PER001_CHE
PER002 Employee Birthdays	Lists employees, their birthdays, and other identifying information.	Administer Workforce, Administer Workforce (GBL), Report, Employee Birthdays Administer Workforce, Administer Workforce (FPS), Report, Employee Birthdays	RNCTL_PER002
PER003 Years of Service	Lists employees who have completed the number of years of service you specify, as of the point in time you specify. Use this report as a reminder of employees who are eligible for vested benefits plans or service recognition awards.	Administer Workforce, Administer Workforce (GBL), Report, Years of Service Administer Workforce, Administer Workforce (FPS), Report, Years of Service	RUNCTL_PER003
PER004 Emergency Contacts	Lists all contacts entered on the Emergency Contact table for each employee in the system.	Administer Workforce, Administer Workforce (GBL), Report, Emergency Contacts Administer Workforce, Administer Workforce (FPS), Report, Emergency Contacts	PRCSRUNCNTL

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER005 Employees on Leave of Absence	Lists all employees on leave and their expected return dates. Use this report to compare the return date you've already entered in PeopleSoft Human Resources with the employee's expected return date or as a reminder for you to enter the return from leave information in the system.	Administer Workforce, Administer Workforce (GBL), Report, Employees on Leave of Absence Administer Workforce, Administer Workforce (FPS), Report, Employees on Leave of Absence	PRCSRUNCNTL
PER006 Mailing Labels	Produces a three-across set of mailing labels for all employees in your PeopleSoft Human Resources database.	Administer Workforce, Administer Workforce (GBL), Report, Mailing Labels Administer Workforce, Administer Workforce (FPS), Report, Mailing Labels	PRCSRUNCNTL
PER007 Temporary Employees	Provides an alphabetical list of all employees marked as temporary, along with length of service and other details of employment.	Administer Workforce, Administer Workforce (GBL), Report, Temporary Employees Administer Workforce, Administer Workforce (FPS), Report, Temporary Employees	RUNCTL_ASOFDATE
PER009 Union Membership	(For users in the USA and Canada) Lists each union organization and the employees who are members.	Administer Workforce, Manage Labor Relations (GBL), Report, Union Membership	PRCSRUNCNTL
PER010 Employee Turnover Analysis	This time-slice report lists each department ID and provides the employee counts as of the date you specify.	Administer Workforce, Administer Workforce (GBL), Report, Employee Turnover Analysis Administer Workforce, Administer Workforce (FPS), Report, Employee Turnover Analysis	RUNCTL_FROMTHRU

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER015 Personnel Actions History	Lists all employees affected by each of the job actions you enter.	Administer Workforce, Administer Workforce (GBL), Report, Personnel Actions History Administer Workforce, Administer Workforce (FPS), Report, Personnel Actions History	RUNCTL_PER015
PER020 Employee Home Address Listing	Contains a complete listing of all employees with addresses and home phone numbers.	Administer Workforce, Administer Workforce (GBL), Report, Employee Home Address Listing Administer Workforce, Administer Workforce (FPS), Report, Employee Home Address Listing	PRCSRUNCNTL
PER021 Pending Future Actions	Lists all employees with job action notices scheduled for a future date.	Administer Workforce, Administer Workforce (GBL), Report, Pending Future Actions Administer Workforce, Administer Workforce (FPS), Report, Pending Future Actions	RUNCTL_ASOFDT_COMP
PER029 Database Audit	Monitors changes, additions, or deletions made to sensitive fields such as salary amounts.	Administer Workforce, Administer Workforce (GBL), Process, Database Audit Administer Workforce, Administer Workforce (FPS), Process, Database Audit	RUNCTL_FROMTHRU

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER032 Passport/Visa Expiration	Lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date.	Administer Workforce, Administer Workforce (GBL), Report, Passport/Visa Expiration Administer Workforce, Administer Workforce (FPS), Report, Passport/Visa Expiration	PRCSRUNCNTL
PER033 Citiznship/Country/ Visa Audit	Lists discrepancies between employee citizenship country/status and visa data. Displays various discrepancies found for the employee citizenship status in the Personal Data table. Looks for the country specified in the Installation table and uses it as the local country.	Administer Workforce, Administer Workforce (GBL), Report, Citiznship/Country/Visa Audit Administer Workforce, Administer Workforce (FPS), Report, Citiznship/Country/Visa Audit	PRCSRUNCNTL
PER038NL NLD Law SAMEN Statistics	Produces the required SAMEN statistics information related to the number of people in the workforce born in a so-called SAMEN country, or of whom one of the parents has been born in one such country.	Administer Workforce, Administer Workforce (GBL), Report Lcl, NLD Law SAMEN Statistics	PER038_NL
PER039GR GER Heavily Disabled	Prints a list of heavily disabled employees and additional information about their disabilities.	Administer Workforce, Administer Workforce (GBL), Report Lcl, GER Heavily Disabled	RUNCTL_PER039GR

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER040GR GER Heavily Disabled Equaliz.	Calculates the required number of heavily disabled employees and the equalization amount of money if the required number of heavily disabled employees is not fulfilled.	Administer Workforce, Administer Workforce (GBL), Report Lcl, GER Heavily Disabled Equaliz.	RUNCTL_PER040GR
PER053 ITA Equal Opportunities	Submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.	Administer Workforce, Administer Workforce (GBL), Report Lcl, ITA Equal Opportunities	RUNCTL_PER053GR
PER054 ESP Official List	Compiles the information you need for Matricula book reporting.	Administer Workforce, Administer Workforce (GBL), Report Lcl, ESP Official List	PER054_ESP
PER055 Union Fees	(For users in Spain) Shows the employees and fees per union and month.	Administer Workforce, Manage Labor Relations (GBL), Report Lcl, ESP Union Fees	RUNCTL_PER055_ESP
PER058 Primary Job Audit	Lists all employees and/or nonemployees whose job records show potential problems.	Administer Workforce, Administer Workforce (GBL), Report, Primary Job Audit Administer Workforce, Administer Workforce (FPS), Report, Primary Job Audit	RUNCTL_PER058
PER059 ITA Union	There are two Italian union reports. You can run a union report generating a list of employees and employee information by union. You can also run a union report listing the number of employees belonging to each union, sorted by category.	Administer Workforce, Administer Workforce (GBL), Report Lcl, ITA Union	PER059

Report ID and Report Name	Description	Navigation	Run Control Page
PER060 ITA Disability	Runs the Annual, Name List, or Disability Statistics reports.	Administer Workforce, Administer Workforce (GBL), Report Lcl, ITA Disability	RUNCTL_PER060
PER061 Labor Relations Letters	Generates various labor relations letters based on data supplied and the type of letter selected.	Administer Workforce, Manage Labor Relations (GBL), Report, Labor Relations Letters	RUNCTL_PER061
PER063JP JPN Appointment Notification	Runs appointment notifications. Depending on the Action/Reason combination you use in the run control, this report prints individual employee notifications of hire, rehire, retirement, transfer, and promotion.	Administer Workforce, Administer Workforce (GBL), Report Lcl, JPN Appointment Notification	RUNCTL_NTF_JPN
PER064JP JPN Appointment List	Runs appointment list reports.	Administer Workforce, Administer Workforce (GBL), Report Lcl, JPN Appointment List	RUNCTL_NTF2_JPN
PER065JP JPN Completion of IC Transfer	Lists employees on temporary intercompany transfer.	Administer Workforce, Administer Workforce (GBL), Report Lcl, JPN Completion of IC Transfer	RUNCTL_PER065_JPN
PER067BEL Social Report	Reports a variety of employer/employee information required by the government.	Administer Workforce, Administer Workforce, Report Lcl, BEL Social Report	RUNCTL_PER067_BEL
PER100CN CAN Hire List	Produces a hire list that provides information on social insurance numbers, effective dates, and badge/payroll numbers within the date range provided.	Administer Workforce, Administer Workforce (GBL), Report Lcl, CAN Hire List	RUNCTL_FROMTHRU

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER103CN OEE Groups by OCC Group	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The report lists the totals of active employees within each defined area code(s) employed within the date range.	Administer Workforce, Administer Workforce (GBL), Report Lcl, OEE Groups by OCC Group	RUNCTL_FTCANAC
PER104CN OEE Groups by Employment Type	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality.	Administer Workforce, Administer Workforce (GBL), Report Lcl, OEE Groups by Employment Type	RUNCTL_FTCANAC
PER105CN OEE Work Force Survey Stats	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.	Administer Workforce, Administer Workforce (GBL), Report Lcl, OEE Work Force Survey Stats	RUNCTL_PER105CN

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER106CN OEE Groups/Jobs Filled/Vacatd	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Groups/Jobs Filled/Vacated report lists the totals of active employees within the defined area code(s) employed within the date range.	Administer Workforce, Administer Workforce (GBL), Report Lcl, OEE Groups/Jobs Filled/Vacatd	RUNCTL_FTCANAC
PER506 Dept Tbl/Security Tree Audit	Lists discrepancies between the data you've entered in the Department Tree and the departments you've added to the current security tree.	Administer Workforce, Administer Workforce (GBL), Report, Dept Tbl/Security Tree Audit Administer Workforce, Administer Workforce (FPS), Report, Dept Tbl/Security Tree Audit	PRCSRUNCNTL
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the minimum, maximum, and midpoint rates for each grade.	Administer Workforce, Administer Workforce (GBL), Report, Salary Grade Table Administer Workforce, Administer Workforce (FPS), Report, Salary Grade Table	PRCSRUNCNTL
PER706B Salary Grade/Step Table	Combines the information in the Salary Grade table and the Salary Step Components table into a list showing all grades for each salary plan that exists in your company and the hourly, monthly, and annual rate amount for any steps you set up. You can select to show the components in each step.	Administer Workforce, Administer Workforce (GBL), Report, Salary Grade/Step Table Administer Workforce, Administer Workforce (FPS), Report, Salary Grade/Step Table	RUNCTL_PER706B

Report ID and Report Name	Description	Navigation	Run Control Page
PER710 Action Reason Table	Lists the reason codes for each personnel action code and arranges them alphabetically by action.	Administer Workforce, Administer Workforce (GBL), Report, Action Reason Table Administer Workforce, Administer Workforce (FPS), Report, Action Reason Table	PRCSRUNCNTL
TAS001 Temp Assignment w/out End Date	Lists employees currently on temporary assignment where end dates have not been defined.	Administer Workforce, Administer Workforce (GBL), Report, Temp Assignmt w/out End Date	RUNCTL_TAS001
TAS002 Temp Assignment due to Complete	Lists employees due to complete temporary assignments within user specified date range.	Administer Workforce, Administer Workforce (GBL), Report, Temp Assignmt due to Complete	RUNCTL_TAS002

Manage Commitment Accounting Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BUD001 Department FTE	Run a Department FTE (department full time equivalent) report, which captures the difference between full time equivalent caps and FTE actuals for each department.	Define Business Rules, Define Commit Accounting(CAN), Report, Department FTE Define Business Rules, Define Commit Accounting(GBL), Report, Department FTE Define Business Rules, Define Commit Accounting(US), Report, Department FTE	RUNCTL_FRMTHRU_DPT

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BUD009 Encumbrance Messages	Run an Encumbrance Message report, which provides information on encumbrance processing error messages. Before using this page, you must have run the encumbrance processes	Define Business Rules, Define Commit Accounting(CAN), Report, Encumbrance Messages Define Business Rules, Define Commit Accounting(GBL), Report, Encumbrance Messages Define Business Rules, Define Commit Accounting(US), Report, Encumbrance Messages	RUNCTL_BUD009
BUD011 Funding Summary	Run a Funding Summary Report page, which lists a summary of funding information for positions or employees within a department. This report can also print information about a specific position or employee when you enter employee or position information as a run control. Before using this page, you must have set up funding information for the departments on which you are reporting.	Define Business Rules, Define Commit Accounting(CAN), Report, Funding Summary Report Define Business Rules, Define Commit Accounting(GBL), Report, Funding Summary Report Define Business Rules, Define Commit Accounting(US), Report, Funding Summary Report	RUNCTL_BUD011

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BUD012 FTE Rollup	Run an FTE Rollup report, which provides a detailed listing of total filled and vacant FTE (full time equivalent) counts by department.	Define Business Rules, Define Commit Accounting(CAN), Report, FTE Roll-Up Report, FTE Roll-Up Report Define Business Rules, Define Commit Accounting(GBL), Report, FTE Roll-Up Report, FTE Roll-Up Report Define Business Rules, Define Commit Accounting(US), Report, FTE Roll-Up Report, FTE Roll-Up Report	RUNCTL_BUD012
BUD020 Retro Distribution	Report on the paychecks that have been modified using retroactive distribution. The report displays the old and the modified check data.	Define Business Rules, Define Commit Accounting(CAN), Report, Retro Distribution Report Define Business Rules, Define Commit Accounting(GBL), Report, Retro Distribution Report Define Business Rules, Define Commit Accounting(US), Report, Retro Distribution Report	RUNCNTL_BUD020

Report ID and Report Name	Description	Navigation	Run Control Page
HPCA010 Predistribution Audit	The Predistribution Audit report audits payroll and configuration data and identifies any errors that could be encountered when you run the Actuals Distribution or Actuals GL Interface processes. Run the Predistribution Audit report after you've run the Paysheet Create process, but before running the Actuals Distribution process.	Compensate Employees, Manage Payroll Processes, Report 2, Predistribution Audit	HP_RUNCTL_PDAUDIT
HPCA012 Fringe and Gross Report	Reports on the Pay Check Distribution records. Run after you've completed the Pay Check distribution process. You must set up column definitions and run the Fringe Gross Load process before running the Fringe and Gross report.	Compensate Employees, Administer GL Interface, Report, Gross and Fringe Report, Gross Fringe Report	HP_RCTL_GRSFR_RPT

Track Faculty Events Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRH905CN StatsCan FT Survey (Statistics Canada full-time survey)	Lists the results of the Statistics Canada Academic Teaching Survey created using the Create Stats-Canada Survey component.	Develop Workforce, Manage Faculty Events, Report, StatsCan FT Survey Report, StatsCan FT Survey Report	RUNCTL_HPH905CN
PER045 Faculty Events	Lists an employee's tracking events, such as activities. Use this report as a template for Curriculum Vitae reporting.	Develop Workforce, Manage Faculty Events, Report, Faculty Events History, Faculty Events Report	RUNCTL_EVENTS

Report ID and Report Name	Description	Navigation	Run Control Page
PER046 Case Review	Captures the case review details and the less secure details of the case review path.	Develop Workforce, Manage Faculty Events, Report, Case Review Status, Case Review Report	RUNCTL_CASE_REVIEW
PER047 Employee Tenure Status	Lists employee tenure status and home department information.	Develop Workforce, Manage Faculty Events, Report, Employee Tenure Status, Empl Tenure Status	RUNCTL_EGPP03
PER050 Tenure Calc (tenure calculation)	Lists the calculated tenure service information in the temporary calculation file created using the Tenure Calc process in Normal Run mode. Administer Flexible Service also uses this report.	Administer Workforce, Administer Flexible Service, Reports, Service Calc Report, Service Calc Report Develop Workforce, Manage Faculty Events, Report, Tenure Calc. Report, Tenure Calc Rpt.	RUNCTL_EGPP05
PER051 Tenure Service List	Provides detailed tenure service information for employees, such as tenure status and track start date.	Develop Workforce, Manage Faculty Events, Report, Tenure Yrs of Service Report, Tenure Service List	RUNCTL_EGPP06

Administer Company Cars Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CAR003 Car List	Produce a list of cars in the company's fleet and list basic information.	Compensate Employees, Administer Company Cars (GBL), Report, Car List	PRCSRUNCNTL
CAR002 Print P11D Section A	Print the results from the CAR001 process in a format similar to the UK government form P11D.	Compensate Employees, Administer Company Cars (GBL), Rep Lcl, UK Print P11D Section A, Print P11D Section A	RUNCTL_COMPCAR001

Manage Competencies Reports

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
CMM007 Licenses, Certificates Renewal	Lists which employees need to renew a license or certificate.	Develop Workforce, Manage Competencies (GBL), Report, Licenses, Certificates Renewal	RUNCTL_CMM007
NVQ001 (GBR) UK NVQ - Employee Status	Lists employees assigned to an NVQ and their status.	Develop Workforce, Manage Competencies (GBL), Report Lcl, UK NVQ – Employee Status	PRCSRUNCNTL
NVQ002 (GBR) UK NVQ - Unit Listing	Lists all defined NVQ units.	Develop Workforce, Manage Competencies (GBL), Report Lcl, UK NVQ – Unit Listing	PRCSRUNCNTL
NVQ003 (GBR) UK NVQ - NVQ Listing	Lists all defined NVQ units.	Develop Workforce, Manage Competencies(GBL), Report Lcl, UK NVQ – NVQ Listing	PRCSRUNCNTL
NVQ004 (GBR) UK NVQ – Unit/Element Listing	Lists the elements associated with NVQ units.	Develop Workforce, Manage Competencies (GBL), Report Lcl, UK NVQ – Unit/Element Listing	PRCSRUNCNTL
NVQ006 (GBR) UK NVQ - Employee Plan	Summarizes an employee's NVQ Unit plan (defined on the Track NVQ - Plan NVQ Units page). First run the NVQ - Initialize Plan process to generate this report.	Develop Workforce, Manage Competencies (GBL), Report Lcl, UK NVQ – Employee Plan	PRCSRUNCNTL
PER011 Competency Inventory	Lists employees in a department and their competencies.	Develop Workforce, Manage Competencies (GBL), Report, Competency Inventory	RUNCTL_PER011
PER537 Competency Listing	Lists competency types and the competencies associated with each type; also lists descriptions and categories.	Develop Workforce, Manage Competencies (GBL), Report, Competency Listing	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER538 Accomplishment Listing	Lists all defined accomplishments. Does not include National Vocational Qualifications (NVQs) for the UK.	Develop Workforce, Manage Competencies (GBL), Report, Accomplishment Listing	RUNCTL_PER538
PER704 License/Certification Table	Lists codes assigned to defined licenses and certifications.	Develop Workforce, Manage Competencies (GBL), Report, License/Certification Table	PRCSRUNCNTL

Manage Performance Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP002 Appraisals by Evaluation Points	Lists each salary grade in your agency, including all titles within each grade determined by the job evaluation point assignment.	Administer Workforce, Manage Performance (USF), Report	RUNCTL_ASOFDATE
PER008 Employee Appraisal Audit	Lists, by department, employees who have completed the review process.	Administer Workforce, Manage Performance (USF), Report	RUNCTL_PER008

Manage Positions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FG0F8 (USF) 0F8	Establishes or creates changes to an existing position. (SQR)	Develop Workforce, Manage Positions (USF), Report, OF8 Report, OF8 Report	RUNCTL_FGOF8
FGHR009 (USF) Job Code/Position Audit	Cross references position numbers and job codes. (SQR)	Develop Workforce, Manage Positions (USF), Report, Job Code Text	RUNCTL_FGASOFDT
FGHR010 (USF) Vacant Position	Lists all currently vacant, budgeted positions in your organization. (Crystal)	Develop Workforce, Manage Positions (USF), Report, Vacant Position Report, Vacant Position Report	RUNCTL_FGHR010

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
FGHR025 (USF) Active/Inactive Position	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Develop Workforce, Manage Positions (USF), Report, Active/Inactive Positions, Active/Inactive Positions	RUNCTL_FGHR025
FGHR026 (USF) Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Develop Workforce, Manage Positions (USF), Reports, Incumbent History	RUNCTL_FGASOFDT
FGHR027 (USF) Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Develop Workforce, Manage Positions (USF), Reports, Active Position History	POSITION_DATA
FGHR028 (USF) Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Develop Workforce, Manage Positions (USF), Report, Exception/Override Report, Exception Override Report	RUNCTL_FGHR028
FGOCC800 (USF) Occupation Series	Provides the details of the Occupational Series table. (Crystal)	Develop Workforce, Manage Positions, Reports, Occupation Series Table	PRCSRUNCNTL
FGPER815 (USF) Position Title Table	Generates a listing of the Position Title Table records. (Crystal)	Develop Workforce, Manage Positions, Reports, Position Title Table	PRCSRUNCNTL
FGPOS819 (USF) Job Code Text	Prints the job code text associated with a position. (Crystal)	Develop Workforce, Manage Positions (USF), Job Code Text	RUNCTL_POSN_NBR
POS001 Position Status	Inventories the types of positions in your organization, and lists all filled and vacant positions. (SQR)	Develop Workforce, Manage Positions, Reports, Position Status	RUNCTL_ASOFDATE

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
POS002 Active/Inactive Positions	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Develop Workforce, Manage Positions, Report, Active/Inactive Positions, Parameters	RUNCTL_POS002
POS003 Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Develop Workforce, Manage Positions, Report, Incumbent History, Parameters	RUNCTL_ASOFDT_COMP
POS004 Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Develop Workforce, Manage Positions, Reports, Active Position History	RUNCTL_ASOFDATE
POS006 Indented Position	Provides a visual representation of reporting relationships among positions by level, if any, in the organization. (SQR)	Develop Workforce, Manage Positions, Report, Indented Position Report, Parameters	RUNCNTL_POS006
POS006A Build Position Structure	Links the positions in the system and creates the reporting hierarchy represented in the Indented Position Report. (SQR)	Develop Workforce, Manage Positions, Reports, Build Position Structure	RUNCTL_ASOFDATE
POS007 Vacant Position	Lists all currently vacant, budgeted positions in your organization. (Crystal)	Develop Workforce, Manage Positions, Reports, Vacant Position Report	PRCSRUNCNTL
POS008 Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Develop Workforce, Manage Positions, Report, Exception/Override Report, Parameters	RUNCNTL_POS008

Manage Professional Compliance Reports

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PCMP002 Compliance Plan	Provides complete details of a company's compliance plan.	Develop Workforce, Professional Compliance, Report, Compliance Plans	RUN_CNTL_PCMP2
PCMP003 RI Observation	Provides complete details of a regulated individual observation.	Develop Workforce, Professional Compliance, Reports, RI Observation	RUN_CNTL_PCMP3
PCMP004 RI Review	Provides complete details of a regulated individual review.	Develop Workforce, Professional Compliance, Reports, RI Review	RUN_CNTL_PCMP4

Administer Salary Packaging Reports

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PKG003 Salary Packaging - Models Due for Review	Displays all employees with packages ready for review.	Compensate Employees, Administer Sal Packaging (AUS), Reports, Packages Due For Review	RUNCTL_PKG003
PKG004 Salary Package Model	Enables you to report on an applicant or an employee's salary package. The information contained in the report displays the details from the employee / applicant salary package pages. Both annual and package period amounts for components, additional components, salary, tax and TPV and TEC are displayed.	Compensate Employees, Administer Sal Packaging (AUS), Reports, Package Models	RUNCTL_PKG004

Report ID and Report Name	Description	Navigation	Run Control Page
PKG006 Salary Packaging FBT Reconciliation	Assists in the reporting of benefits and liabilities to the Australian Taxation Office at the end of the Fringe Benefits Tax Year— March 31. The Australian Taxation Office has identified different categories of fringe benefits and each category has its own specific rules for calculating the taxable value.	Compensate Employees, Administer Sal Packaging (AUS), Reports, FBT Reconciliation	RUNCTL_PKG006
PKG007 Salary Packaging Package Details	Reports on the amounts budgeted for each component of a package in each pay period. The report, run on an employee only basis, requires a start and end date of the period of time you wish to report on.	Compensate Employees, Administer Sal Packaging (AUS), Reports, Package Details	RUNCTL_PKG007

Manage Variable Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
VC001 Actual Award Report	Run the Actual Awards report after the system publishes the awards for payout. This report shows any modifications that you made to the award on the Award Allocations page.	Compensate Employees, Manage Variable Compensation, Report, Actual Award Report	RUNCTL_VC_REP
VC002 Budget Report	Helps you calculate how much funding to allocate to a plan.	Compensate Employees, Manage Variable Compensation, Report, Budget Report	RUNCTL_VC_REP

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
VC003 Calculate Awards Report	View the results of the Award Calculation process.	Compensate Employees, Manage Variable Compensation, Report, Calculate Awards Report	RUNCTL_VC_REP
VC004 Carryover Report	View the carryover balances.	Compensate Employees, Manage Variable Compensation, Report, Carryover Report	RUNCTL_VC_REP
VC005 Employee History Report	View employee variable compensation history within date ranges that you specify on the run control page.	Compensate Employees, Manage Variable Compensation, Report, Employee History Report	RUNCTL_VC_EEHIS_RP
VC006 Funding Allocation Report	Review and evaluate the distribution of funds to all of the groups in the plan.	Compensate Employees, Manage Variable Compensation, Report, Funding Allocation Report	RUNCTL_VC_REP
VC007 Guarantee Report	View the employee guarantees.	Compensate Employees, Manage Variable Compensation, Report, Guarantee Report	RUNCTL_VC_REP
VC008 Non Monetary Report	Track the number of units awarded under a plan and the value to employees.	Compensate Employees, Manage Variable Compensation, Report, Non Monetary Report	RUNCTL_VC_REP
VC009 Plan History Report	View variable compensation plan history within date ranges that you specify on the run control page.	Compensate Employees, Manage Variable Compensation, Report, Plan History Report	RUNCTL_VC_REP
VC010 Variance Report	View the variance between the target award and the actual award that appears on the Award Allocations page.	Compensate Employees, Manage Variable Compensation, Report, Variance Report	RUNCTL_VC_REP

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
VC011 Organization and Group Goals Report	Provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.	Compensate Employees, Manage Variable Compensation, Report, Organization and Group Goals	RUNCTL_VC_REP
VC012 Consistency Report	Provides a list of employees who have fallen off a tree and the groups to which they belonged. The variable compensation administrator or the employees' managers can use this information to ensure that these individuals get the appropriate awards.	Compensate Employees, Manage Variable Compensation, Report, Consistency Report	RUNCTL_VC_REP
VC013 Subscription Error Report	Run the Subscription Error report after receiving workflow email notification that an erred or rejected award has been returned from PeopleSoft Payroll for North America or PeopleSoft Stock Administration.	Compensate Employees, Manage Variable Compensation, Report, Subscription Error Report	RUNCTL_VC_REP
VCP001 Tree Member Overlap Report	Identifies employees who exist multiple times on a tree. This enables you to validate or correct the group membership, as appropriate.	Compensate Employees, Manage Variable Compensation, Report, Tree Member Overlap	RUNCTL_VCP001

Manage French Public Sector Reports

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
FP_PROM Promotable Employees	Lists the employees promotable by a given date. To be launched after the FPA800 SQR.	Administer Workforce, Launch Collective Process (FPS), Report, Promotable Employees	RUNCTL_FPAPROM
FPA_CARB Career Simulation	Lists the simulated career data after reclassification or simulation of step increment.	Administer Workforce, Report (FPS), Report-FP, Career Simulation	RUNCTL_FPACRYSTAL3
FPA025 Rating	Lists employees that have been evaluated and those who have not.	Administer Workforce, Launch Collective Process (FPS), Report, Rating Administer Workforce, Report (FPS), Report FP, Evaluation Status, Rating	RUNCTL_FPA025
FPA030 Adjustment Constant	Calculates and reports the adjustment constant per reviewer in a given corps	Administer Workforce, Report (FPS), Report-FP, Adjustment Constant	RUNCTL_FPA030
FPA110 Edit Individual Orders	Edits all individual orders for a period, status and action code.	Administer Workforce, Report (FPS), Report-FP, Edit Individual Orders	RUNCTL_FPA110J
FPA110 Edit Collective Orders	Edits all collective orders for a period, status and action code.	Administer Workforce, Report (FPS), Report-FP, Edit Collective Orders	RUNCTL_FPA110C
FPA115 Collective Order Number Updating	Attributes a number to collective orders.	Administer Workforce, Report (FPS), Report-FP, Collective Order Number Updating	RUNCTL_FPA115
FPA400 Part-Time Schedule	Lists part-time employees, whose part-time will end soon	Administer Workforce, Report (FPS), Report-FP, Part-Time Schedule	RUNCTL_FROMTHRU

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
FPA405 Current PPd Schedule	Lists employees nearing the end of their probation period.	Administer Workforce, Report (FPS), Report-FP, Current PPd Schedule	RUNCTL_FROMTHRU
FPA-AFFE Assignment – Request tbc	Lists requests for assignment changes that need to be approved	Administer Workforce, Report (FPS), Report-FP, Assignment – Request tbc	RUNCTL_FPACRYSTAL1
FPA-CARR Career-Request tbc	Lists requests for career changes that need to be approved	Administer Workforce, Report (FPS), Report-FP, Career – Request tbc	RUNCTL_FPACRYSTAL1
FPACNTR FPACNTR2 Contribution Call Letters	Contribution call letters contain the employee's address and the contribution amounts. Launch this report after FPA1100 SQR.	Administer Workforce, Launch Collective Process (FPS), Report, Contribution Call Letters	RUNCTL_FPA1150
FPAEE_CA Employee Career/Action	Lists employee career data.	Administer Workforce, Report (FPS), Report-FP, Employee Career/Action	RUNCTL_FPACRYSTAL2
FPAEE_PO CSPosition/Employee	Lists employee civil service position data	Administer Workforce, Report (FPS), Report-FP, CSPosition/Employee	RUNCTL_FPACRYSTAL2
FPAHISTA Assignment – Request Rejected	Lists rejected assignment change requests.	Administer Workforce, Report (FPS), Report-FP, Assignment – Request Rejected	RUNCTL_FPACRYSTAL1
FPAHISTC Career – Request Rejected	Lists rejected career change requests.	Administer Workforce, Report (FPS), Report-FP, Career – Request Rejected	RUNCTL_FPACRYSTAL1
FPAHISTP CSPosition – Request Rejected	Lists rejected civil service position requests.	Administer Workforce, Report (FPS), Report-FP, CSPosition – Request Rejected	RUNCTL_FPACRYSTAL1

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
FPAHISTS Compensation – Request Rejected	Lists rejected compensation change requests.	Administer Workforce, Report (FPS), Report-FP, Compensation – Request Rejected	RUNCTL_FPACRYSTAL1
FPAHISTW Work Time – Request Rejected	Lists rejected work time change requests.	Administer Workforce, Report (FPS), Report-FP, Work Time – Request Rejected	RUNCTL_FPACRYSTAL1
FPA-POSI CS Position tbc	Lists approved civil service change requests.	Administer Workforce, Report (FPS), Report-FP, CS Position tbc	RUNCTL_FPACRYSTAL1
FPARAT2 FPA_RAT List of Employees to be Rated	Lists employees to be rated according to attendance time, sorted by department or grade. Launch this report after FPA1200 SQR.	Administer Workforce, Launch Collective Process (FPS), Report, List of Employees to be Rated	RUNCTL_FPA1210
FPA-REMU Compensation – Request tbc	Lists compensation change requests requiring approval.	Administer Workforce, Report (FPS), Report-FP, Compensation – Request tbc	RUNCTL_FPACRYSTAL1
FPA-TDTR Work Time – Request tbc	Lists work time change requests requiring approval.	Administer Workforce, Report (FPS), Report-FP, Work Time – Request tbc	RUNCTL_FPACRYSTAL1
FPMACT1 Action List – Report 1	Lists action definition part 1.	Define Business Rules, Define Business Rules (FPS), Report, Action List – Report 1	PRCSRUNCNTL
FPMACT2 Action List – Report 2	Lists action definition part 2.	Define Business Rules, Define Business Rules (FPS), Report, Action List – Report 2	PRCSRUNCNTL
FPMACTLE Actions/CS Position	Lists actions authorized by civil service position.	Define Business Rules, Define Business Rules (FPS), Report, Actions/CS Position	PRCSRUNCNTL

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
FPMACTPR Retro Prcs Action Rules	Lists the retroactivity rules for action codes.	Define Business Rules, Define Business Rules (FPS), Report, Retro Prcs Action Rules	PRCSRUNCNTL
FPMACTST Actions/Status	Lists actions authorized by status.	Define Business Rules, Define Business Rules (FPS), Report, Actions/Status	PRCSRUNCNTL
FPMBUISN Occupation	Lists occupation codes.	Define Business Rules, Define Business Rules (FPS), Report, Occupation	PRCSRUNCNTL
FPMCORPS Corps	Lists corps definitions.	Define Business Rules, Define Business Rules (FPS), Report, Corps	PRCSRUNCNTL
FPMINDEX Index Value	Lists index/amount values.	Define Business Rules, Define Business Rules (FPS), Report, Index Value	PRCSRUNCNTL
FPMJOBCD Job Code	Lists job code definitions.	Define Business Rules, Define Business Rules (FPS), Report, Job Code	PRCSRUNCNTL
FPMLEGAL Civil Service Position	Lists civil service position definitions.	Define Business Rules, Define Business Rules (FPS), Report, Civil Service Position	PRCSRUNCNTL
FPMPOINT Type of Point	Lists type of point definitions.	Define Business Rules, Define Business Rules (FPS), Report, Type of Point	PRCSRUNCNTL
FPMRANK1 Grade List – Report 1	Lists grade definition part 1.	Define Business Rules, Define Business Rules (FPS), Report, Grade List – Report 1	PRCSRUNCNTL
FPMRANK2 Grade List – Report 2	List grade definition part 2.	Define Business Rules, Define Business Rules (FPS), Report, Grade List – Report 2	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FPMSALST Sal Grade Table/Scale-Steps	Lists salary grade table – steps.	Define Business Rules, Define Business Rules (FPS), Report, Sal Grade Table/Scale-Steps	PRCSRUNCNTL
HR_FPFIRA_CI Final Rating	Attributes the final rating to the employees.	Administer Workforce, Report (FPS), Report-FP, Final Rating	RUNCTL_FPA035

Note. Additional Manage French Public Sector reports can be found under the Administer Workforce Reports section.

Meet Regulatory Requirements Reports

Report ID and Report Name	Description	Navigation	Run Control Page
APP001 Adverse Impact	Provides information on recruitment and hiring practices; compares hiring decisions for white males to ethnic minorities and females.	Monitor Workplace, Report Regulations (US), Report, Adverse Impact Monitor Workplace, Report Regulations (USF), Report, Adverse Impact	RUN_CTL_REG
APP002 Job Group Movement Analysis	Provides gender and ethnic group movements in and out of an organization and tracks career progression patterns.	Monitor Workplace, Report Regulations (US), Report, Job Group Movement Analysis	RUN_CTL_REG
OHS001 OSHA-200 Log	Lists the case numbers and details of each injury and illness that occurred during a particular calendar year.	Monitor Workplace, Report Regulations (US), Report, OSHA-200 Log, Parameters Monitor Workplace, Report Regulations (USF), Report, OSHA-200 Log, Parameters	RUNCTL_CALENDARYR

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER016 EEO-1 Employer Information	Provides equal employment opportunity (EEO) information on private organizations.	Monitor Workplace, Report Regulations (US), Report, EEO-1 Employer Info	RUNCTL_PER016
PER017 EEO-1 Job Analysis	Supplies standard job category counts instead of employee counts for the private sector.	Monitor Workplace, Report Regulations (US), Report, EEO-1 Job Analysis Report	RUNCTL_PER017
PER019 Termination Analysis	Analyzes terminations within your organization according to predetermined groupings of age, years of service, gender, and ethnic group.	Monitor Workplace, Report Regulations (US), Report, Termination Analysis	RUN_CTL_REG
PER022 EE0-5 Job Analysis	Supplies standard job category counts for school-related categories.	Monitor Workplace, Report Regulations (US), Report, EEO-5 Job Analysis, Parameters	RUNCTL_ASOFDATE
PER024 Job Group Analysis	Analyzes the makeup of your workforce based on skills groups.	Monitor Workplace, Report Regulations (US), Report, Job Group Analysis	RUN_CTL_REG
PER024A Job Group Analysis Summary	Analyzes the makeup of your workforce based on job groups.	Monitor Workplace, Report Regulations (US), Report, Job Group Analysis Summary	RUN_CTL_REG
PER025 Work Force Analysis	Tracks hiring practices by department based on job titles.	Monitor Workplace, Report Regulations (US), Report, Work Force Analysis	RUN_CTL_REG
PER027 VETS-100 Process	Lists federal job classifications and the number of employees and new hires in the last 12 months who are disabled veterans or Vietnam veterans.	Monitor Workplace, Report Regulations (US), Report, VETS-100 Process Monitor Workplace, Report Regulations (USF), Report, VETS-100 Federal Contractor, Vets-100 Process	RUNCTL_PER027

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER027C VETS-100 Analysis	Reports on the VETS-100 data created by the VETS-100 process.	Monitor Workplace, Report Regulations (US), Report, VETS-100 Analysis Monitor Workplace, Report Regulations (US), Report, VETS-100 Submit Monitor Workplace, Report Regulations (USF), Report, VETS-100 Federal Contractor, Vets-100 Process	RUNCTL_PER027C
PER027C Vets-100 Submit	Creates the digital file for submission to the government. You must run the VETS-100 Process before running this report.	Monitor Workplace, Report Regulations (US), Report, VETS-100 Analysis Monitor Workplace, Report Regulations (US), Report, VETS-100 Submit Monitor Workplace, Report Regulations (USF), Report, VETS-100 Federal Contractor, Vets-100 Process	RUNCTL_PER027C
PER030 Job Group Roster	Lists employees in job groups in job title order.	Monitor Workplace, Report Regulations (US), Report, Job Group Roster	RUN_CTL_REG
PER031 EEO-4 State and Local Government	Provides employment counts in the prescribed format for state and local governments.	Monitor Workplace, Report Regulations (US), Report, EEO-4 State and Local Govt, Parameters	RUNCTL_PER031

Report ID and Report Name	Description	Navigation	Run Control Page
PER036 PRWORA - New Hire	This report provides the information employers furnish to the Federal Directory of New Hires after hiring a new employee.	Monitor Workplace, Report Regulations (US), Report, PRWORA - New Hire, FEDERAL PRWORA - New Hire Monitor Workplace, Report Regulations (USF), Report, New Hire Reporting, New Hire Extract	RUNCTL_PER036
PER036S PRWORA - New Hire	Provides the information employers furnish to the State Directory of New Hires after hiring a new employee.	Monitor Workplace, Report Regulations (US), Report, PRWORA - New Hire, STATE PRWORA - New Hire Monitor Workplace, Report Regulations (USF), Report, New Hire Reporting, New Hire Extract	RUNCTL_PER036_S
PER040 IPEDS-S	Provides an analysis of the tenure status of full-time faculty members by gender and ethnic grouping.	Monitor Workplace, Report Regulations (US), Report, IPEDS-S Report	RUNCTL_PER040

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

(AUS) Meet Regulatory Requirements Reports for Australia

Report ID and Report Name	Description	Navigation	Run Control Page
PER712AUS ASCO	Prints a list of the ASCO reporting codes.	Monitor Workplace, Report Regulations (AUS), Report, ASCO Table, Prcsruncntl	PRCSRUNCNTL

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(AUS) Meeting Regulatory Requirements for Australia"

(CAN) Meet Regulatory Requirements Reports for Canada

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER101CN Employment Equity	Creates an interface file to export to Canadian Employment Equity software. (SQR)	Monitor Workplace, Report Regulations (CAN), Report, Employment Equity	RUNCTL_PER101CN
PER102CN Canadian Official Languages Data File	Creates an import file to report official languages information. (SQR)	Monitor Workplace, Report Regulations (CAN), Report, Official Language Rqmts	RUNCNTL_PER102CN
PER715CN Pay Equity Table	Lists job evaluation information. (Crystal)	Monitor Workplace, Report Regulations, (CAN), Report, Pay Equity Table, Run Control	PRCSRUNCNTL
PER716CN National Occupation Codes	Lists the NOC codes used in categorizing your job codes. (SQR)	Monitor Workplace, Report Regulations (CAN), Report, National Occupation Codes, Run Control	PRCSRUNCNTL

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

(FRA) Meet Regulatory Requirements Reports for France

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
DIS001 Disability	Calculate the theoretical number of disabled employees who should work for the company and list the disabled employees, excluding temporary workers, trainees, and apprentices. For companies with more than 20 employees. (SQR)	Monitor Workplace, Report Regulations (FRA), Report, Disability Report	RUNCTL_DIS001_FRA

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
ELE001 Election	Provides the results of the staff representative elections for employees and management. (Crystal)	Monitor Workplace, Monitor Elections (FRA), Report, Election Report, Runctl Ele001	RUNCTL_ELE001
REG001FR Monthly Workforce	Lists the monthly personnel changes for a given establishment of a company. (SQR)	Monitor Workplace, Report Regulations (FRA), Report, Monthly Workforce Report	RUNCTL_REG001_FRA
REG002FR Personal Register	Lists employees for a given establishment of a company. Run the report for a specific establishment within an organization or for all the establishments or an organization. (SQR)	Monitor Workplace, Report Regulations (FRA), Report, Personal Register	RUNCTL_REG002_FRA
REG003FR Workforce by Nationality	Provides a comprehensive analysis of the foreign workforce employed in a company. (SQR)	Monitor Workplace, Report Regulations (FRA), Report, Workforce by Nationality	RUNCTL_REG003_FRA
SOC001 Employee Survey	Gives an annual snapshot of a company based on the calculation of several indicators, such as the number of employees in the organization and their average salary. (Crystal)	Monitor Workplace, Report Regulations (FRA), Report, Employee Survey Report	RUNCTL_SOC001
TRN029 Report Training 2483	Declares vocational training that your organization has provided to your employees. Compiles the results of the 2483 indicators. (Crystal)	Develop Workforce, Administer Training (GBL), Report Lcl, FRA Training Report 2483, Report Training 2483 Monitor Workplace, Report Regulations (FRA), Report, Training Report 2483, Report Training 2483	RUNCTL_TRN029

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

(GBR) Meet Regulatory Requirements Reports for the UK

Report ID and Report Name	Description	Navigation	Run Control Page
APP001UK Adverse Impact	Displays the breakdown of job offers versus applications by UK-specific ethnic groups and by gender.	Monitor Workplace, Report Regulations (UK), Report, Adverse Impact Report, Parameters	RUNCTL_FROMTHRU
PER019UK Termination Analysis	Displays the current employee count and the number of terminations.	Monitor Workplace, Report Regulations (UK), Report, Termination Analysis, Parameters	RUNCTL_FROMTHRU
PER025UK Work Force Analysis	Tracks hiring practices by department, or other organizational units, based on job titles in the department.	Monitor Workplace, Report Regulations (UK), Report, Work Force Analysis, Parameters	RUNCTL_PER025UK
PER030UK Job Group Roster	Lists your employees in job groups.	Monitor Workplace, Report Regulations (UK), Report, Job Group Roster, UK Job Group Roster	RUNCTL_PER030UK
PER037UK Joint Staffing	Gives a breakdown of your workforce by job code, gender, and full or part-time status.	Monitor Workplace, Report Regulations (UK), Report, Joint Staffing Report	RUNCTL_ASOFDATE
UKNI001 Northern Ireland	Indicates the religious composition of the workforce, job applicants, and appointees. The report format emulates the Monitoring Return, which is required by organizations operating in Northern Ireland.	Monitor Workplace, Report Regulations (UK), Report, Northern Ireland Report, Fair Empl. Monitoring Return	RUNCTL_UKNI

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

(USF) Meet Regulatory Requirements Reports for the US Federal Government

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
FGHR012A EEO Groups by PATCOB/POI	Details the distribution of equal employment opportunity (EEO) groups and comparison by PATCOB and POI.	Monitor Workplace, Report Regulations (USF), Report, EEO Groups by PATCOB/POI	RUNCTL_FGHR012
FGHR012B EEO Groups by PATCOB/SubAgency	Details the distribution of EEO groups and comparison by PATCOB and sub-agency.	Monitor Workplace, Report Regulations (USF), Report, EEO Groups by PATCOB/SubAgency	RUNCTL_FGHR012
FGHR013A VETS-100 by SubAgency	Generates a Veterans employment report by sub-agency.	Monitor Workplace, Report Regulations (USF), Report, VETS-100 by SubAgency	RUNCTL_FGHR013
FGHR013B VETS-100 by POI	Generates a Veterans employment report by POI.	Monitor Workplace, Report Regulations (USF), Report, VETS-100 by POI	RUNCTL_FGHR013
FGHR014A EEO Groups by Series/POI	Details the distribution of EEO groups and comparison by occupation and POI.	Monitor Workplace, Report Regulations (USF), Report, EEO Groups by Series/POI	RUNCTL_FGHR014
FGHR014B EEO Groups by Series/SubAgency	Details the distribution of EEO groups and comparison by series and sub-agency.	Monitor Workplace, Report Regulations (USF), Report, EEO Groups by Series/SubAgency	RUNCTL_FGHR014
FGHR019B CPDF Error	Lists the CPDF edit errors found in CPDF Error Processing.	Monitor Workplace, Report Regulations (USF), Report, CPDF Error Report, Run CPDF Error Report	RUNCTL_FGHR019B
FGSF113A SF113-A	Generates a monthly report of federal civilian employment.	Monitor Workplace, Report Regulations (USF), Report, SF113-A Report	RUN_FGSF113A
FGSF113G SF113-G	Generates a monthly report of full-time equivalent and work-year civilian employment.	Monitor Workplace, Report Regulations (USF), Report, SF113-G Report	RUN_FGSF113G

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(USF) Performing Central Personnel Data File Edit Processing"

Monitor Absence Reports

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
ABS001 Absence Listing	Provides information about an employee's absence history.	Administer Workforce, Monitor Absence (GBL), Report, Absence Listing	RUNCTL_ABS001
ABS002 Absence Periods	Provides information about the number of employee absence periods.	Administer Workforce, Monitor Absence (GBL), Report, Absence Periods	RUNCTL_ABS001
ABS003 Time Lost Due to Absence	Provides employee absence information.	Administer Workforce, Monitor Absence (GBL), Report, Time Lost Due to Absence	RUNCTL_ABS003
ABS004UK Bradford Score	Lists employee absences for the regulatory region of GBR only. It lists department, employee name, employee ID, employee type, job title, total number of absences, total number of days absent, and the Bradford Score.	Administer Workforce, Monitor Absence (GBL), Rep Lcl, UK Bradford Score	RUNCTL_ABS004UK
ABS005NL ABS006NL Illness Registration	Calculates the illness totals, percentages, and frequencies.	Administer Workforce, Monitor Absence (GBL), Rep Lcl, NLD Illness Registration	RUNCTL_ABS005_NL

Monitor Health and Safety Reports

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
OHS001CN Workers Compensation Board Form 7	Provides some of the information required for provincial WCB Form 7s. Use this report to manually transcribe information to the printed form required by the WCB in most Canadian provinces.	Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, CAN WCB Form 7	RUNCTL_OHS001CN
OHS001FR Work Accident Report	Tracks information on the employer, the establishment, the casualty, and details of the accident such as witnesses and other third parties. Use this information to complete the official French report.	Monitor Workplace, Monitor Health/Safety(GBL), Rep. Lcl, FRA Work Accident Report	OHS001FR
OHS001GR Accident Report	Provides information about the person injured, body parts, physician and hospital data, injury source and nature, unsafe acts, hazards, causes, corrective or preventative actions, and witnesses for the incident that you select.	Monitor Workplace, Monitor Health/Safety (GBL), Proc. Lcl, GER Collect Accident Data Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, GER Accident Report	RUNCTL_OHS501GR
OHS001UK Injury/Dangerous Occurence	Provides the data about health and safety incidents needed to meet the health and safety reporting requirements in the United Kingdom. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, UK Injury/Dang. Occ. Report, RIDDOR F2508	RUNCTL_OHS_UK
OHS002GR Reportable Accident/Illness	Produces a Reportable Accident /Illness report for Germany.	Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, GER Reportable Accdnt/Illness	RUNCTL_OHS002GR

Report ID and Report Name	Description	Navigation	Run Control Page
OHS002UK Illness Report	Provides information to meet the health and safety reporting requirements in the United Kingdom. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, UK Illness Report, RIDDOR F2508A	RUNCTL_OHS_UK
OHS003 Non-Employees In Incidents	Summarizes the non-employees involved in incidents that occurred within a specified date range. It notes whether they suffered an illness or injury. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Report, Non-Employees In Incidents	RUNCTL_OHS_FROMTO
OHS003GR Incident Location Summary	Provides information about travel, mode of transportation, details about whether drugs were involved, and details about individuals associated with the incident. This report is available only in German. (SQR)	Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, GER Incident Location Summary	RUNCTL_OHS003GR
OHS004GR Illness Report	Includes information about the individual, including personal data, nationality, children, job, and physician. This report is only available in German. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Proc. Lcl, GER Collect Illness Data Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, GER Illness Report	RUNCTL_OHS504GR

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
OHS008CN Workers Compensation Board Incident	Provides specific incident information required by the Canadian Worker's Compensation Board, such as incident occurrence information, work absence and work resumption, the person responsible, first aid provided, and other information required by the WCB. Use information from this report to manually complete WCB reporting forms. (SQR)	Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, CAN WCB Incident	RUNCTL_OHS_INC
OHS009 Incident Detail	In addition to the occurrence information, the report lists all causes and related corrective actions, witnesses, involved persons (including detailed injury information), OSHA information, lost work, and physician information.	Monitor Workplace, Monitor Health/Safety (GBL), Report, Incident Detail	RUNCTL_OHS_INC
OHS010 Incident Summary	Summarizes health and safety incidents that have occurred within a specified date range. This report lists all involved persons and indicates whether an OSHA report was filed related to a person's involvement. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Report, Incident Summary	RUNCTL_OHS_FROMTO

Report ID and Report Name	Description	Navigation	Run Control Page
OHS011 Location Incident Summary	Summarizes the incidents that occurred at specific locations and within the specified date range. The report lists all persons involved in the incident and indicates whether or not they received an OSHA reportable illness or injury. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Report, Location Incident Summary	RUNCTL_OHS_FROMTO
OHS012 Claim Summary Overview	Summarizes claims that have been logged within a specified date range. The report itemizes by amounts within a Charge Type, subtotals by Charge Type, subtotals by claim, and then calculates a grand total of all charges within the reporting period. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Report, Claim Summary Overview	RUNCTL_OHS_FROMTO
OHS013 Employees In Incidents	Summarizes employees involved in incidents that have occurred within a specified date range. It notes whether the employee has suffered an injury or illness (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Report, Employees In Incidents	RUNCTL_OHS_FROMTO
OHS014 Incident Lost Work	Lists the lost or restricted workdays for an employee involved in a health and safety incident within a specified reporting period and totals lost and restricted days by incident. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Report, Incident Lost Work	RUNCTL_OHS_FROMTO

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
OHS014ESP Incident Without Lost Work	Generates a list of accidents that didn't result in lost workdays. This report prints the Employee Name, Gender, NSS, Accident Date, and Accident Type. This report must be printed by Work Center. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, ESP Incident Without Lost W.	RUNCTL_OHS_FROMTO
OHS015 Incident Claim Detail	Lists the claims filed for a specific incident, the employee filing the claim, provider information related to the claim, and detailed charges (by charge type) related to the claim. The report subtotals by charge type within a claim, subtotals by the claim itself, and then provides a grand total of all claim charges for the incident. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Report, Incident Claim Detail	RUNCTL_OHS_INC
OHS016 Vehicle Incident Summary	Summarizes information about vehicles involved in incidents within a specified date range. The report lists the vehicle and equipment information and related information about the people involved. (Crystal)	Monitor Workplace, Monitor Health/Safety (GBL), Report, Vehicle Incident Summary	RUNCTL_OHS_FROMTO

Report ID and Report Name	Description	Navigation	Run Control Page
PER002CHE Accident Report	Provides the information required by Swiss law in a format accepted by all Swiss insurance companies. (SQR) Use this report to create an accident report to submit to your organization's insurance company following an accident.	Monitor Workplace, Monitor Health/Safety (GBL), Rep. Lcl, CHE Accident Report	RUNCTL_PER002_CHE

Plan Careers and Successions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CARPLAN Employee Career Plan	Lists an employee's career plan as entered by different evaluators (Crystal).	Develop Workforce, Plan Careers, Report, Career Plan	RUNCTL_CAR001
CARTRAIN Employee Career Training Plan	Lists an employee's training plan to meet career goals (Crystal).	Develop Workforce, Plan Careers, Report, Career Training	RUNCTL_CAR002
FGHR022 (USF) Individual Development Plan	Produces an Individual Development Plan (IDP) for an employee. (SQR).	Develop Workforce, Plan Careers, Report, IDP	RUN_FGHR022
PER034 Internal Resume	Creates a resume-like document from the data contained in PeopleSoft tables. (SQR).	Develop Workforce, Plan Successions (GBL), Report, Internal Resume	RUNCTL_PER034

Administer Salaries for the Netherlands Reports

Report ID and Report Name	Description	Navigation	Run Control Page
INT001NL Insurance Board Notification	Reports personal data for new employees to the Dutch insurance board.	Define Business Rules, Define General Data (NLD), Report, Ins Board Notification	RUNCTL_INT001_NL

Report ID and Report Name	Description	Navigation	Run Control Page
INT002NL Insurance Notification	Report to the DNHS (Dutch National Health Service) if an employee's income rises above a certain level.	Define Business Rules, Define General Data (NLD), Report, Insurance Notification	RUNCTL_INT002_NL
INT003NL Pay Groups	Provides an overview of the pay groups entered in the system.	Define Business Rules, Define General Data (NLD), Report, Pay Groups	PRCSRUNCNTL
INT004NL Earnings	Reviews all the valid earnings codes that you entered into the system , along with the payroll calculation characteristics that you assign to each.	Define Business Rules, Define General Data (NLD), Report, Earnings	PRCSRUNCNTL
INT005NL Deductions	Reviews all the valid deduction codes that are entered into the system.	Define Business Rules, Define General Data (NLD), Report Deductions	PRCSRUNCNTL
INT006NL General Deduction/Frequency	Shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the employee pay frequency, and any additional flat deduction amounts.	Define Business Rules, Define General Data (NLD), Report, General Deduction/Frequency	PRCSRUNCNTL

Plan Salaries Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP001 Salary Structure	Lists all salary grades in descending order by grade.	Administer Workforce, Plan Salaries (GBL), Report, Salary Structure	RUNCTL_ASOFDATE

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
CMP002 Job Grading by Evaluation Points	Lists each salary grade in the organization along with salary data for all titles within that grade ordered by the job evaluation point assignment.	Administer Workforce, Plan Salaries (GBL), Report, Job Grading by Evaluation Points	RUNCTL_ASOFDATE
CMP003 Compa-Ratio Analysis	Compares an employee's salary to the others within the same salary grade.	Administer Workforce, Plan Salaries (GBL), Report, Compa_Ratio Analysis	RUNCTL_ASOFDATE
CMP004 Below Minimum Analysis	Shows employees making less than the minimum amount in their salary grade.	Administer Workforce, Plan Salaries (GBL), Report, Below Minimum Analysis	RUNCTL_ASOFDATE
CMP005 Above Maximum Analysis	Lists all employees whose annual rate is above the maximum amount for the salary grade.	Administer Workforce, Plan Salaries (GBL), Report, Above Maximum Analysis	RUNCTL_ASOFDATE
CMP008 Salary Change Mass Update by Salary Plan and Pay Group	Displays the changes that made to employees' job records before you run the related database agent to update the job records as well as the employees' previous and new compensation package.	Administer Workforce, Plan Salaries (GBL), Process, Update by Salary Plan and Paygroup	RUNCTL_CMP008
CMP010 Salary Mass Update by Job Code	Displays changes to the Salary Administration Plan, Grade and Step that will be made to employees' job records before you run the related database agent to actually insert new job records. This report displays the employees' previous and new Sal Admin Plan (salary administration plan), Grade, and Step.	Administer Workforce, Plan Salaries (GBL), Process, Salary Mass Update by Job Code	RUNCTL_CMP010

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
CMP011 Salary History by Employee	Displays each salary change for an employee during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Administer Workforce, Plan Salaries (GBL), Report, Salary History by Employee	RUNCTL_CMP011
CMP014 Salary History by Group	Provides the salary changes for the employees in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Administer Workforce, Plan Salaries (GBL), Report, Salary History by Group	RUNCTL_CMP014
CMP020JP (JPN) Salary Simulation	Generates the results of the Salary Increase Simulation process.	Administer Workforce, Plan Salaries, Report, Salary Simulation Report JPN	RUN_SALREPORT_JPN
LMS001 and LMS002 Forecasted Compensation	Analyzes the impact on the forecasted period of the events defined in the scenario and the variations of the compensation and headcount over the two periods (LMS002: Variations).	Compensate Employees, Forecast Compensation (FRA), Report, Forecasted Compensation	RUNCTL_LMS_REPORT
LMS003 Scenario Comparison	Compare two scenarios.	Compensate Employees, Forecast Compensation (FRA), Report, Scenario Comparison	RUNCTL_LMS_REPORT

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
LMS004 Rate Codes Without Rate Code Class	Provides rate codes that don't have a rate code class attached to them.	Compensate Employees, Forecast Compensation (FRA), Report, Rate Codes without Rate Code Class	RUNCTL_LMS_RATE_CL
PER008 Employee Review Audit	Lists employees in the group who have completed the review process and those who have not.	Administer Workforce, Plan Salaries (GBL), Report, Employee Review Audit	RUNCTL_PER008
PER012 Departmental Salaries	Provides an alphabetical list of employees by department, basic job data information, and a breakdown of pay rates for each.	Administer Workforce, Plan Salaries (GBL), Report, Departmental Salaries	RUNCTL_ASOFDATE_LC
PER013 Employee Compensation Changes	Lists employees who have had compensation rate changes within a selected time period.	Administer Workforce, Plan Salaries (GBL), Report, Employee Compensation Changes	RUNCTL_PER013
PER023 Salary History for Company	Displays each salary change for an employee during a specified time period.	Administer Workforce, Plan Salaries (GBL), Report, Salary History for Company	RUNCTL_PER023
PER026 EE Review Result Distribution	Displays employee review results by group ID and review time period.	Administer Workforce, Plan Salaries (GBL), Report, EE Review Result Distribution	RUNCTL_PER026
PER041 Employee With Merit	Lists all employees who have received a merit increase during the period entered on the parameter page.	Administer Workforce, Plan Salaries (GBL), Report, Employee with Merit	RUNCTL_FROMTHRU
PER042 Employee Without Merit	Lists all employees who have not received a merit increase during the period entered on the parameter page.	Administer Workforce, Plan Salaries (GBL), Report, Employee without Merit	RUNCTL_FROMTHRU

Report ID and Report Name	Description	Navigation	Run Control Page
PER062JP (JPN) Grade Advance Candidate List	Lists employees who are eligible to advance from the grade you enter.	Administer Workforce, Plan Salaries, Report Lcl, JPN Grade Advance Candidate List	RUNCTL_PER062_JPN
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.	Administer Workforce, Plan Salaries (GBL), Report, Salary Grade Table	PRCSRUNCNTL
PER706B Salary Grade and Step Tables	Lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.	Administer Workforce, Plan Salaries (GBL), Report, Salary Grade and Step Tables	RUNCTL_PER706B

Recruit Workforce Reports

Report ID and Report Name	Description	Navigation	Run Control Page
APP002 Job Group Movement Analysis	Provides racial and gender demographic data regarding your hiring process. (SQR).	Develop Workforce, Recruit Workforce (GBL), Report, Job Group Movement Analysis, Parameters	RUNCTL_FROMTHRU
APP003 Requisition Status	For each job requisition, the report lists job information, requisition status, recruiter, the number of applicants, and expenses information.	Develop Workforce, Recruit Workforce, Report, Requisition Status	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
APP004 Requisition Posting	Extracts job posting data from the database and formats it for merging into Microsoft Word documents. (SQR, Word for Windows).	Develop Workforce, Recruit Workforce (GBL), Report, Requisition Posting, Parameters	RUNCTL_APP004
APP005 Candidate Listing	This report combines job requisition information with a list of candidates being interviewed for the position. It groups requisitions by Department ID. (SQR)	Develop Workforce, Recruit Workforce, Report, Candidate Listing	PRCSRUNCNTL
APP006 Requisition Cost Analysis	Provides a breakdown of expense types and amounts for each job requisition. (SQR)	Develop Workforce, Recruit Workforce, Report, Requisition Cost Analysis	PRCSRUNCNTL
APP007 Recruitment Letters	Generate the recruitment letters for applicants that you have tagged with a letter code. (SQR, Word for Windows)	Develop Workforce, Recruit Workforce (GBL), Report, Recruitment Letters, Run Control Develop Workforce, Recruit Workforce (USF), Report, Recruitment Letters, Run Control	RUNCTL_APP007
APP011 Applicant Sum. by Requisition (applicant summary by requisition)	For each job requisition, this report lists the number of applicants and percentage of total applicants that applied, sorted by source type and specific source. (SQR).	Develop Workforce, Recruit Workforce, Report, Applicant Sum. by Requisition	PRCSRUNCNTL
APP012 Applicant Sum. by Source (applicant summary by source)	Lists the number of applicants and percentage of total applicants sorted by source type and specific source (regardless of requisition). (SQR).	Develop Workforce, Recruit Workforce, Report, Applicant Sum. by Source	PRCSRUNCNTL

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
APP012GR (GER) Job Postings	A Germany-specific report that lists all information related to a job requisition, including required competencies and accomplishments, as well as duties performed.	Develop Workforce, Recruit Workforce (GBL), Report Lcl, GER Job Postings, Parameters	RUNCTL_APP012GR
APP013GR (GER) Works Council Posting	A Germany-specific report that lists all open job requisitions that are monitored by a specific Works Council. (SQR)	Develop Workforce, Recruit Workforce (GBL), Report Lcl, GER Works Council Posting, Parameters	RUNCTL_APP013GR
FGHR032 (USF) Full Vacancy Announcement	Generates a hard copy of the full vacancy announcement. This must be run after you have created the USA Jobs Feed. (SQR)	Develop Workforce, Recruit Workforce (USF), Process, Full Vacancy Announcement	GVT_RUNCTL_FULLVAC
FGREC820 (USF) Evaluation of Candidates	Produces three Evaluation of Candidate reports sorted by applicant ID, name, and score. (Crystal)	Develop Workforce, Recruit Workforce (USF), Report, Evaluation of Candidates, Evaluation of Candidates	RUN_FGREC820
FGREC821 (USF) Certificate of Eligibles	Generates a Certificate of Eligibles report. (Crystal)	Develop Workforce, Recruit Workforce (USF), Report, Certificate of Eligibles, Run Fgrec821	RUN_FGREC821

Report ID and Report Name	Description	Navigation	Run Control Page
PER034 Internal Resume	Produces a summary of job history information for an employee. (SQR)	Develop Workforce, Plan Successions (GBL), Report, Internal Resume, Run Control Develop Workforce, Plan Successions (USF), Report, Internal Resume, Run Control Develop Workforce, Recruit Workforce (GBL), Report, Internal Resume, Run Control Develop Workforce, Recruit Workforce (USF), Report, Internal Resume, Run Control	RUNCTL_PER034

Report Total Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
TC001 Total Compensation Statement (Benefits Statement)	A listing of all compensation for each individual, designed for distribution to employees.	Compensate Employees, Report Total Compensation, Report, Employee Total Compensation	TC_BEN_RUN_CNTL
TC002 Group Summary Compensation	Aggregated information for each individual within a group that you specify.	Compensate Employees, Report Total Compensation, Report, Group Summary Compensation	TC_GRP_RUN_CNTL
TC003 Employee Compensation Report	Detailed information about each compensation type for each individual within a group that you specify.	Compensate Employees, Report Total Compensation, Report, Group Detail Compensation	TC_GRP_RUN_CNTL

Track Flexible Service Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER048 Employee Service Listing	Lists employees by calculation group and service type and within specified time periods. Sort by ascending or descending service time.	Administer Workforce, Administer Flexible Service, Reports, Empl Service Listing, Service List	RUNCTL_EGPP04
PER049	Lists the results of the Normal Run batch process and includes all employees who have a temporary file (resulting from a process in Normal Run mode) containing details about their accrued service credits.	Administer Workforce, Administer Flexible Service, Reports, Service Calc Report, Service Calc Report Develop Workforce, Manage Faculty Events, Report, Tenure Calc. Report, Tenure Calc Rpt.	RUNCTL_EGPP05

Track Global Assignments Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER032 Passport/Visa Expiration	Lists employees and dependents who have passports, visas, or work permits on file that will expire in the next 90 days from the report run date. (SQR).	Administer Workforce, Track Global Assignments (GBL), Report, Passport Visa Expiration Administer Workforce, Track Global Assignments (USF), Report, Passport Visa Expiration	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER717 Employees on Assignment	Lists employees on assignment. (Crystal).	Administer Workforce, Track Global Assignments (GBL), Report, Employees on Assignment Administer Workforce, Track Global Assignments (USF), Report, Employees on Assignment	RUNCTL_PER717

Base Benefit Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BEN001 Health Plan Participants	Lists active health plan participants as of a specified date. Useful for determining the number of employees in plan types offered by specific providers.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_BEN_LANG
BEN002 Life Insurance Participants	Lists active life plan participants as of a specified date. Useful for determining the number of employees in plan types offered by specific providers.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_BEN_LANG
BEN003 Benefit Contribution Register	Summarizes benefit contributions by employee and employer.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_BEN003
BEN003CN (CAN) Benefit Contribution Register	Summarizes benefit contributions by employee and employer for Canadian companies.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_BEN003CN
BEN004 Savings Investment Distribution	Lists total deductions and company contributions for employees participating in savings plans.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_BEN004

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BEN007 Leave Accruals	Displays leave accrual information by leave plan and employee.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_BEN_LANG
BEN008 Section 415 Report	Lists employee amounts either over or under the Section 415 limit for savings plans. Lists plans that are excluded from and included in the 415 limit.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_ASODATE_BEN
BEN009 Section 415 Non-Compliance	Lists employees who have exceeded Section 415 limits.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_ASODATE_BEN
BEN020 FMLA Status	Displays summary information for approaching FMLA leave requests, current FMLA leave requests, recently completed FMLA leaves, and denied FMLA leave requests.	Compensate Employees, Administer FMLA, Report	RUNCTL_BEN020
BEN021 FMLA Payroll Audit	For employees on FMLA leave or who have recently completed leaves, displays employee ID, name, FMLA request number, begin/return dates, job status, payroll earnings during leave period, FMLA hours taken (paid and unpaid, and the total difference between the hours reported as paid by Payroll and those marked as paid in the FMLA system).	Compensate Employees, Administer FMLA, Report	RUNCTL_BEN021

Report ID and Report Name	Description	Navigation	Run Control Page
BEN022 BEN023 HIPAA	BEN022 prints a twelve-month history of a former employee's group health coverage for specified plan types, as specified by the Health Insurance Portability and Accountability Act (HIPAA) of 1996. BEN023 prints a history for a selected dependent. Only plan types with the HIPAA Plan check box selected on the Benefit/Deduction Program Table have HIPAA history displayed on these reports.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_HIPAA
BEN040 Billing Statements	Prints a bill for all employees with outstanding balances who are actively enrolled in the Benefits Billing system. Statements report activity from/to dates; activity type, plan type, benefit plan, coverage, amount and due dates. Also included is the total due and total overdue information, with any comments entered on the billing calendar.	Compensate Employees, Administer Benefits Billing, Report	RUNCTL_BEN040
BEN041 Delinquent Accounts	Displays charge and payment activity for employees who have failed to keep their payments current in accordance with the terms established on the Benefits Billing Plan Table.	Compensate Employees, Administer Benefits Billing, Report	RUNCTL_BEN041

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BEN042 Accounts Receivable	Displays all payment activity, include the amounts paid and how the amounts were applied.	Compensate Employees, Administer Benefits Billing, Report	RUNCTL_BEN042
BEN043 History Activity	Displays all billing account activity for a specific period of time, by employee.	Compensate Employees, Administer Benefits Billing, Report	RUNCTL_BEN043
BEN044 Calculation Errors	Lists billing calculation errors.	Compensate Employees, Administer Benefits Billing, Report	RUNCTL_BILL_CAL
BEN045 Benefits Billing Audit	Displays employees with open charges and open credits; active enrollments audit; inactive enrollments audit; employees with holds longer than three months; and enrollment holds longer than three months.	Compensate Employees, Administer Benefits Billing, Report	RUNCTL_BEN_LANG
BEN050 Primary Job Audit	Identifies: Employees without a record in the Primary Jobs table. Employees without a job record in the Primary Jobs table. Employees without a primary job flag turned on. Employees without a primary job indicated for a specific benefit record. Employees with more than one primary job designated for a specific benefit record number.	Compensate Employee, Administer Base Benefits, Reports, Primary Job Audit	RUNCTL_BEN050

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BEN110 Premium Report	List employees, their coverage, and premium amounts for specified vendor and plan type.	Compensate Employees, Administer Base Benefits, Reports, Snapshot Premium Report	RUNCTL_BEN102
BEN141 A/R Interface	Extracts charges for a selected billing period and any charge adjustments with posting dates that fall within the billing period. Includes two types of records. One holds employee information, and the other holds accounting information for the Benefits Billing charges and charge adjustments.	Compensate Employees, Administer Benefits Billing, Process	RUNCTL_BEN042
BEN140 Payment Interface	Lists information about Benefits Billing payments processed by the batch interface program. Can be used as an alternate to entering payments through the Payment Entry page. The system applies the payments to the charges by plan type within due date, oldest due date first. The payments are posted as of the posting date on the transaction.	Compensate Employees, Administer Benefits Billing, Process	RUNCTL_BEN_LANG
BEN200 Section 403(b) Employee Listing Report	Provides information on all employees on the Employees 403(b) Annuity Data pages.	Compensate Employees, Administer Base Benefits, Reports	RUNCTL_BEN200
BEN201 Section 403(b) Exceptions Report	Lists employees who are approaching or exceeding Section 403(b) limits, along with other errors and exceptions.	Compensate Employees, Administer Base Benefits, Reports	RUNCTL_BEN201

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BEN202 Section 403(b) Employee Letters	Lists employees who have Section 403(b) information.	Compensate Employees, Administer Base Benefits, Reports	RUNCTL_BEN202
BEN701 Flexible Spending Account	Lists information in the Flexible Spending Account Table.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN702 Flat Rate	Prints information from the Flat Rate Table, where you define rates to be charged per selected frequency for a particular benefit program/plan.	Define Business Rules, Define Base Benefits, Report	RUNCTL_ASODATE_BEN
BEN703 Disability Plan	Prints information from the Disability Plan Table.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN704 Age Coverage Rate	Prints information from the Age-Graded Coverage Table, including: Effective dates of the rates. Rating factors, such as age ranges, sex, and smoking status, by employer and employee.	Define Business Rules, Define Base Benefits, Report	RUNCTL_ASODATE_BEN
BEN705 Life AD/D	Prints information from the Life AD/D Plan Table, including plan type, plan name, benefit plan ID and name, effective date, coverage, flat amount, rating factor, and group code.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BEN707 Savings Plan	Prints information from the Savings Plan Table, including savings plan type, benefit plan, effective date, employer investment matching option, and the terms of the employee deductions and employer contributions and investment options.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN708 Calculation Rules	Lists calculation rules information by calculation rule ID.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN709 Benefit Plan	Prints information from the Benefit Plan Table, including effective date, description, provider ID and name, default deduction code and name, and the indicator for non-discrimination testing.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN710 Leave Plan 1	Prints information from Leave Plan Table page 1, including plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BEN710A Leave Plan 2/3	Prints information from Leave Plan Table pages 2 and 3, including each plan type and its name and ID, effective date, service interval, separate service rate values and bonus values, pay versus time, pay at term, term pay percent, negative balances allowed, and individual first year rate values.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN711 Retirement Plan	Lists information from the Retirement Plan Table, where you define retirement plans for the California Public Employees Retirement System (PERS).	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN713 Benefit Program Definition	Prints information from the Benefit Program Table, including associations between benefit programs and plans, rates, calculation rules, and payroll rules.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN713
BEN714 Service Rate	Prints information about each service rate ID, including effective date, pay frequency, rate per unit, service intervals, total rate, employer portion, and employee portion.	Define Business Rules, Define Base Benefits, Report	RUNCTL_ASODATE_BEN

Report ID and Report Name	Description	Navigation	Run Control Page
BEN715 Vacation Buy/Sell	Prints each vacation buy/sell plan type name and ID and its effective date, buy/sell description, earnings type, pay frequency, vacation hours (increments, minimum, and maximum), and the percent of salary and maximum vacation amounts.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN716CN (CAN) Pension Plan 1	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, special accumulator code, pension plan type, voluntary contributions indicator, credit CPP indicator, RCT registration number, contribution percentage, and the employee and employer percentages for contributions up to YMPE and over YMPE.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN717CN (CAN) Pension Plan 2	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, contribution rate type, the pension rate earnings limit, and the employee and employer percentages for contributions up to YMPE and over YMPE.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BEN718CN (CAN) Pension Plan 3	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan name and ID, effective date, special accumulator, pension plan type, if voluntary contribution is allowed, pension administration percentage under and over the YMPE, pension administration earnings that are excluded, benefit entitlement ceiling, and the pension administration annual base hours.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN720 FMLA Plan Table	Prints information from the FMLA Plan Table, including FMLA calendar type, eligibility criteria, and the annual leave entitlement.	Define Business Rules, Define Base Benefits, Report	RUNCTL_BEN_LANG
BEN721 Limit Table	Prints information from the Limit Table, where you define government regulations that limit the amount that a participant can contribute or receive from a qualified plan.	Define Business Rules, Define Base Benefits, Report	RUNCTL_ASODATE_BEN
BEN731 Salary Rate	Lists information from the Salary Rate Table, where you define a percentage of salary for flexible credit options and deduction calculations. Includes effective dates of the salary percentages for a rate ID.	Define Business Rules, Define Base Benefits, Report	RUNCTL_ASODATE_BEN

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
BEN733 Base Benefit Audit	Summarizes potential employee data error conditions as related to Base Benefits business process. Includes employees without Employment records, employees without Job records, employees under 16 years old, employees with unusual dependents signed up for coverage, employees with spouses (or other dependents) both electing health benefits, employees with overage dependent coverage, and employees with incorrect health plans set up on the Benefit Program Table.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_BEN_LANG
BEN734 Court Ordered Coverage Audit	Lists employees not compliant with court-ordered dependent benefit coverage or minimum spousal coverage.	Compensate Employees, Administer Base Benefits, Report	RUNCTL_BEN734
BEN740 Billing Calendar	Displays the following information for each billing period: billing period identifier, begin/end dates, payment due date, COBRA payment due date, calculation run (y/n) and statements printed (y/n).	Define Business Rules, Define Benefits Billing, Report	RUNCTL_BEN_LANG

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
CBR001 COBRA Initial Notification Letter	Generates letters that display a qualified COBRA participant's terminating health coverage, qualified COBRA coverage, and the response dates by which he or she must return the election or waive request. It also includes an enrollment form.	Compensate Employees, Administer COBRA, Report	RUNCTL_CBR001
CBR002 COBRA Secondary Notification Letter	Generates letters that display information about the extension of COBRA continuation coverage for COBRA participants who have experienced secondary qualifying events.	Compensate Employees, Administer COBRA, Report	RUNCTL_CBR002
CBR003 COBRA Termination Letter	Generates letters that inform COBRA participants that their COBRA coverage is about to expire.	Compensate Employees, Administer COBRA, Report	RUNCTL_CBR003
CBR004 COBRA Open Enrollment Letter	Provides Open Enrollment forms for COBRA participants.	Compensate Employees, Administer COBRA, Report	RUNCTL_CBR004
CBR005 COBRA Event Summary	Lists all employees for whom a COBRA event occurred, along with the event status.	Compensate Employees, Administer COBRA, Report	RUNCTL_CBR005
CBR006 COBRA Enrollment	Lists all COBRA participants and their current elections, including coverage begin dates.	Compensate Employees, Administer COBRA, Report	RUNCTL_CBR006

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
CBR007 COBRA Audit	Displays active employees enrolled in COBRA health coverage; employees and spouses (or other dependents) electing health benefits for the same dependent ID; and employees who have overage dependents.	Compensate Employees, Administer COBRA, Report	RUNCTL_CBR007
CBR008 COBRA Administration Error	Displays errors in the COBRA process, including COBRA event conflicts, lack of eligible benefit program or multiple eligible benefit programs, or duplicate COBRA events.	Compensate Employees, Administer COBRA, Report	RUNCTL_CBR008
FGPY017 (USF) FEHB Reconciliation	Federal agencies are required to send quarterly reports to major FEHB providers. These reports allow the provider to compare their enrollment records with that of the federal agency. They also provide total headcount and premium amounts.	Compensate Employees, Administer Base Benefits, Reports, FEHB Reconciliation	GVT_RUN_FGPY017
NDT004 401 Nondiscrimination Testing	Lists output from the 401(k) Nondiscrimination Testing SQR (NDT002) and from the 401(m) Nondiscrimination Testing SQR (NDT003).	Compensate Employees, Administer NDT, Report	PRCSRUNCTL

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
NDT008 129 Nondiscrimination Testing	Lists the results of three Section 129 Nondiscrimination Testing SQRs:. *NDT005:* Eligible Cross Section Test (eligible employees test) *NDT006:* 55% Average Benefits Test *NDT007:* Concentration Test (5% Owner Test)	Compensate Employees, Administer NDT, Report	PRCSRUNCTL
PAY031 Deductions and Benefits Register	Reports deductions taken, sorted by deduction code	Compensate Employees, Administer Base Benefits, Report	RUNCTL_PAYINIT2
PAYVNDR Provider/Vendor	Lists information from the Provider/Vendor table, including provider name and ID, provider effective date, provider address, and a separate address line for premium payment, where applicable.	Define Business Rules, Define Base Benefits, Report Compensate Employees, Administer AP Interface, Report, AP Vendor Listing	RUNCTL_PAYVNDR
RDED001 Retroactive Deductions Requested - 'Not Processed Status	Lists retroactive deduction requests that have not been processed.	Compensate Employees, Manage Retroactive Processing, Report Compensate Employees, Manage Retroactive Processing, Report, Retro Ben/Ded Requested, Retro Ben/Dedn Open Requests Compensate Employees, Manage Retroactive Processing, Report, Retro Ben/Ded All Calculated, Retro Ben/Dedn Request Status	RUNCTL_RTRODED1

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
RDED002 Retroactive Deductions in Progress - 'Calculate Status'	Lists retroactive deduction requests that have been processed.	Compensate Employees, Manage Retroactive Processing, Report Compensate Employees, Manage Retroactive Processing, Report, Retro Ben/Ded Requested, Retro Ben/Dedn Open Requests Compensate Employees, Manage Retroactive Processing, Report, Retro Ben/Ded All Calculated, Retro Ben/Dedn Request Status	RUNCTL_RTRODED1
RDED002B Retro Ben/Ded Summary	Summarizes retroactive deduction request information by employee ID. Includes deduction type, deduction amount (old and new), and recalculated deduction amounts with the total due to or due by the employee.	Compensate Employees, Manage Retroactive Processing, Report	RUNCTL_BEN_LANG
RDED003 Retroactive Deductions Audit Rpt - 'Loaded to Paysheet' Status	Summarizes retroactive deduction information for requests loaded to the payroll system. Includes deduction type, deduction amount (old/new) and re-calculated deduction amounts with total due to and/or due by the employee.	Compensate Employees, Manage Retroactive Processing, Report	RUNCTL_RTRODED3

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
RDED004 Retroactive Ben/Ded Terms Calculated (Terminated Employees Loaded)	Summarizes retroactive deduction information for requests loaded to the payroll system for terminated employees. Includes deduction type, deduction amount (old/new) and re-calculated deduction amounts with total due to and/or due by the employee.	Compensate Employees, Manage Retroactive Processing, Report Compensate Employees, Manage Retroactive Processing, Report, Retro Ben/Ded Loaded, Retro Ben/Dedn Paysheet Load Compensate Employees, Manage Retroactive Processing, Report, Retro Ben/Ded Terms Calculated, Retro Ben/Dedn Terminations	RUNCTL_RTRODED 3

Common Elements Used in HRMS and HR Reports Pages

Following are elements common to several pages used to run the HRMS and HR reports:

From Date or **Begin Date** — Enter the beginning date of the time period you want to report.

Thru Date or **End Date** — Enter the ending date of the time period you want to report.

Department — Select the department for which you want to run the report. To report on all departments, leave this field blank.

Basic PeopleSoft HRMS Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

CMP013 - Update Seniority Pay Reporting

Lists the seniority pay updates for a group of employees. Run this report after you've run the Update Seniority Pay process (HR_CMP013) and before you run the Upd Seniority Pay - Load Data process (HR_CMP013_CI) to load the changes to Job.

Source Records

HR_SEN_PAY1_TAO, PERSONAL_DATA, JOB; COMPENSATION, COMP_RATECD_TBL

See Also

"Working with Multiple Components of Pay," Running the Update Seniority Pay and Update Seniority Eligibility Processes

CMP014S - Update Seniority Eligibility Reporting

Lists employees and all their seniority changes. Run this report after you've run the Update Seniority Eligibility process (HR_CMP014) and before you run the Upd Seniority Elig - Load Data process (HR_CMP014_CI) to load the changes to Job.

Source Records

HR_CMP014_1_TAO, PERSONAL_DATA, JOB, COMPENSATION, COMP_RATECD_TBL

See Also

"Working with Multiple Components of Pay," Running the Update Seniority Pay and Update Seniority Eligibility Processes

CMP015 - General Compensation Update

Reports on all the changes performed by the General Compensation Update Process. Run this report after you've run the General Compensation Update process (HR_CMP015).

Source Records

HR_CMP015_TAO1, HR_CMP015_BEF_J, HR_CMP015_BEF_C, HR_CMP015_AFT_J, HR_CMP015_AFT_C, PERSONAL_DATA, COMP_RATECD_TBL

See Also

"Working with Multiple Components of Pay," Refreshing Employee Compensation

CMP016 - Defaulting Rules Eligibility

Defaulting Rule Select the defaulting rule or rules whose eligibility you want to report.

Source Records

PS_CMP_RULE_DEFN, PS_CMP_RULE_WHERE, PS_CMP_RULE_VALUES, PS_CMP_OPT_REQ_FLD, PS_JOB, PS_PERSONAL_DATA, PS_FAST_PERSGL_VW2

(USF) FGPER802 - Geographic Location Table

Source Record

GVT_GEOLOC_TBL

(USF) FGPER803 - Agency Table

Source Record

LOCATION_TABLE

(USF) FGPER804 - Sub-Agency Table Report

Source Record

GVT_SUBAGCY_TABLE

(USF) FGPER805 - Personnel Office ID Table

Source Record

GVT_POI_TABLE

(USF) FGPER806 - U.S. County Table

Source Record

GVT_COUNTY_TABLE

(USF) FGPER807 - Locality Pay Area Table

Source Record

GVT_LOCAREA_TABLE

(USF) FGPER808 - LEO Pay Area Table

Source Record

GVT_LEOAREA_TABLE

(USF) FGPER809 - State Table Report

Source Record

STATE_NAMES_TABLE

(USF) FGPER811 - Handicap Table

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.

Source Record

GVT_HANDICAP_TBL

(USF) FGPER812 - Legal Authority Table

Source Record

GVT_LEGAL_AUTH_TBL

(USF) FGPER813 - Nature of Action Table

Source Record

GVT_NOAC_TBL

(USF) FGPER814 - NOA Authority 1

Source Records

GVT_NOAC_TBL, GVT_LEGAL_AUTH_TBL

(USF) FGPER816 - Priority Placement Table

Source Record

GVT_PRIO_TBL

(USF) FGPER817 - Work Location Table Report

Source Record

GVT_LOC_TABLE1

(USF) FGPER823 - Job Code Table

Source Record

JOBCODE_TBL

GBP001 - Group Member Overlap

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.

Source Records

JOB, PERSONAL_DATA, EMPLOYMENT, PERS_DATA_EFFDT, COMPENSATION, TL_EMPL_DATA

GBP002 - Group Membership

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.

Source Records

JOB, PERSONAL_DATA, EMPLOYMENT, PERS_DATA_EFFDT, COMPENSATION, TL_EMPL_DATA

(USF) PAY711 - Pay Group

Source Record

PAYGROUP_TBL

(USF) PAY717 - Pay Plan

Source Records

ERN_PROGRAM_TBL, ERN_PROGRAM_DEF, EARNINGS_TBL

PER044 - Multiple Seniority Components

The report provides the following information regarding the origin of the seniority rate code:

- If the worker receives a seniority pay component as a result of belonging to a group associated with a seniority rate code, the report displays the corresponding group ID for the seniority rate code.

- If a worker receives the seniority pay component because the seniority rate code is associated with all workers, the report displays *All* as the origin of the seniority rate code.
- If a worker receives the seniority pay component because you manually added it, the report displays *Manually Added* as the origin for the seniority rate code.

Rate Code — Select this option if you want to run the Update Seniority Pay process by 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 select this option, the **Rate Code** field in the next section of the page becomes available for entry.

Group ID — Select this option if you want to run the Update Seniority Pay process by 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 select this option, the **Group ID** field in the next section of the page becomes available for entry.

All — Click to run the report for all employees.

Rate Code — This field is available for entry if you clicked the Rate Code button. Select one or more rate codes. The system displays the associated group IDs when you leave the field.

Group ID — This field is available for entry if you clicked the Group ID button. Select one or more 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.)

Source Records

PS_SEN_PAY_GROUP, PS_SEN_PAY_COMPRT, PS_COMPENSATION, PS_COMP_RATECD_TBL, PS_SEN_PAY_TBL, PS_PERSONAL_DATA, PS_EMPLOYMENT

See Also

"Working With Multiple Components of Pay"

PER701 - Department Table

Source Record

DEPT_TBL

PER702 - Installation Table

Source Records

INSTALLATION, PSOPTIONS

PER705 - Location Table

Source Record

LOCATION_TABLE

PER707 - Company 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.

A separate report program (PAY702) prints the General Ledger information you enter in the Company Table.

Source Record

COMPANY_TBL

PER708 - Country Table

Source Record

COUNTRY_TBL

(US) PER709A - Job Code Table

Source Record

JOBCODE_TBL

(CAN) PER709B - Job Code Table

Source Record

JOBCODE_TBL

PER709C - Job Code Table

Source Record

JOBCODE_TBL

PER711 - Standard Letter Table

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.

Source Record

STANDRD_LTR_TBL

See Also

Generating Form Letters

PER713 - Currency Code Table

Source Record

CURRENCY_CD_TBL

PER714 - Currency Rate Table

Source Record

CUR_RT_TBL

Administer Training Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

Common Elements Used in Administer Training Reports Pages

Course Code — Select from course codes that you set up in the Course Table. To run a report for all courses leave this field blank. If the report is course specific, the system will indicate this as a required field.

Session # (session number) — Select from the list of active sessions.

Course Session Nbr (course session number) — Select from the list of active sessions that you set up in the Course Session Table.

FGSF182 - SF182

Note. This page can be accessed only by Federal users.

Non-EmplID (nonemployee ID) — Select an ID for inclusion in the report.

Request # (request number) — Select from the list of training requests.

Source Records

PS_TRN_EEEXPN_COST, PS_TUIT_EXPEN_TBL, PS_TRAINING, PS_PERSONAL_DATA, PS_PERS_NID NID, PS_GVT_HANDICP_TBL, PS_EMPLOYMENT, PS_JOB, PS_JOBCODE_TBL, PS_GVT_SUBAGCY_TBL, PS_DEPT_TBL, PS_LOCATION_TBL, PS_PERSONAL_PHONE

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Enrolling or Waitlisting Students," Enrolling Students Manually

(MEX) MXSTP001 – DC-1 Training Mixed Committee Constitution

Mixed Committee — The Mixed Committee must be of a Training type.

Contract Type — Specify the contract type by selecting ***Individual, Collective,*** or ***Law.***

Source Records

PS_COMPANY_TBL, PS_ESTAB_TBL, PS_MIX_COM_TBL_MEX, PS_MIX_COM_REP_MEX MR, PS_JOB

(MEX) MXSTP003 – DC-2 Training and Development Plans

Mixed Committee	The Mixed Committee must be of a Training type.
Contract Date	Enter the Collective Contract signature date or the Collective Contract revision date.
Plan Phases	Define the number of phases in which you are going to run your training program plan.
Print Address	Select if you want the address of your company to be printed out on the report.
Contract Type	Specify the contract type by selecting ***Individual, Collective,*** or ***Law.***
Modality	Select the class of training program. This depends on what you are going to report and is information that's provided by the STPS. Valid values are ***Specific Company Plans & Prog, Common Company Plans & Prog,*** and ***Gen. System Branch (Econ. Act).***
Training Plan Obj. Priority	Select the training plan objective priority. Valid values are ***Increase Productivity, Prepare to Occupy New Vac/Pos, Prevent Work Risks, Provide New Technologies Info,*** and ***Upg/Improve Knowledge & Comp.***

Source Records

PS_COMPANY_TBL, PS_ESTAB_TBL, PS_MIX_COM_TBL_MEX, PS_MIX_COM_REP_MEX MR, PS_JOB

(MEX) MXSTP005 – DC-2B Training and Development Registration Application

Training Program	Select the type of training program that you want to generate the report for.

Source Records

PS_TRN_PROGRM_CRSE, PS_COURSE_TBL, PS_ESTAB_TBL

(MEX) MXSTP006 – DC-3 Courses/Events Certificates

Employee Representative Name	Enter the name of the employee representative on the mixed committee.
From Employee/To	Enter the EmplIDs for the employees that the training report is being generated for.

Plan Type	Select the type of **Training Program** or **Course** that you want to generate the report for. If you select **Training Program,** all the courses belonging to the training program will appear.
Instructor ID	Provide the Instructor ID.

Source Records

PS_JOB, PS_TRN_PROGRM_TBL, PS_TRN_INSTRCT_TBL, PS_TRN_VENDOR_TBL

(MEX) MXSTP007 – DC-4 Courses/Events Certificates List

Source Records

PS_ESTAB_TBL, PS_JOB, PS_TRAINING

(MEX) MXSTP008 – DC-5 Training and Development External Registration Application

Application Type	Specify the type of application. Valid values are ***Initial, Instructor Change, New Programs,*** and ***Update Courses.***
Print Instructors	If you select the **Print Instructor** check box, the names of the instructors will print on the report.
Plan Type	Select the type of **Training Program** or **Course** that you want to generate the report for.

Source Records

ESTAB_TBL, PS_TRN_PROGRM_TBL, PS_COURSE_DESCR, PS_TRN_INSTRCT_TBL

PER107GR - Int. Prof. Educational Status

Source Records

PERSONAL_DATA, ACOMPLISHMENTS, EE_IPE_STEPS

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "(GER) Tracking Professional Educational Programs for German Employees"

PER703 - Course Table

Source Records

PS_COURSE_TBL, PS_COST_UNIT_TBL

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Setting Up Training Courses"

TRN001 - Training Letters

This report involves three processes, running in the following order:

- An SQR report extracts data from the database and creates data extract files.
- A Microsoft Word for Windows mail merge prints training letters such as notification of course session enrollment, schedule changes, and cancellations. The report generates letters for all students, including nonemployees.
- An application engine process emails training letters to students with an email address specified in personal data.

Select the Training Letters process (process type PSJob) if you want Process Scheduler to automatically run the processes sequentially. Process Scheduler runs the SQR report process to extract data, then it uses the Word macro to merge the data, and finally it runs the Application Engine process that will email training letters to students with email addresses.

If you prefer to run each process manually, select the SQR Report process first. When that has run, you run the WinWord process to merge the data, and then run the Application Engine process for emails.

For the SQR Report process, select File in the Type field and LP in the Format field.

No matter what Output Destination that you specify on Process Scheduler, the system always sends the data extract files and the form letter to a temp directory. You use Word for Windows to print the letters

Source Records

PS_CRSE_SESSN_TBL, PS_TRAINING, PS_CRSE_SESS_DATES, PS_PERSONAL_DATA, PS_TRN_FACIL_TBL, PS_TRN_ROOM_TBL, PS_CRS_1ST_SESS_VW, PS_RUN_CNTL_TRN001, PS_EMAIL_ADDRESSES

See Also

"Generating Form Letters," Modifying the Word Macros for the Sample Letters

TRN002 - Course Session Roster

Course Start Date Enter as an alternative to selecting a session number.

Source Records

PS_TRAINING, PS_COURSE_TBL, PS_PERSONAL_DTA_VW

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Enrolling and Waitlisting Students"

TRN003 - Course Waiting List

Source Records

PS_TRAINING, PS_COURSE_TBL, PS_PERSONAL_DTA_VW

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Enrolling or Waitlisting Students," Managing Waiting Lists

TRN004 - Training Schedule

As Of Date and **End Date** Enter the start date and the end date for the report.

Source Records

PS_CRSE_SESSN_TBL, PS_COURSE_TBL, PS_COST_UNIT_TBL, PS_CRSE_SESS_DATES

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Administering Course Sessions"

TRN005 - Training Facility Schedule

Report Request Parameters

Facility Select the facility you want the report to cover.

Source Records

PS_CRSE_SESSN_TBL, PS_COURSE_TBL, PS_TRN_ROOM_TBL, PS_CRSE_SESS_DATES

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Administering Course Sessions"

TRN010 - Active Scenario Summary

Source Records

PS_BUDGET_PERIOD, PS_TRN_SCENARIO , PS_TRN_SIMULATION, PS_TRN_DEMAND

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Planning Training Budgets for Your Organization"

TRN011 - Global Scenario Summary

Budget Period Select from the list that you set up on the Budget Period Table.

Scenario Select from the list that you created.

Source Records

PS_BUDGET_PERIOD, PS_TRN_SCENARIO, PS_TRN_SIMULATION, PS_TRN_DEMAND

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Planning Training Budgets for Your Organization"

TRN016 - Target Course Certifications

Source Records

PS_COURSE_TBL, PS_COURSE_LICENSE, PS_LIC_CERTIF_VW, PS_COST_UNIT_TBL, PS_COURSE_DESCR

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs," Setting Up Training Programs

TRN017 - Course Rating

Source Records

PS_COURSE_TBL, PS_CRSE_SESSN_TBL, PS_CRSE_SESS_INSTR, PS_CRSE_SESS_RATNG, PS_COST_UNIT_TBL, PS_COURSE_DESCR

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Administering Course Sessions," Recording Student Feedback on Course Sessions

TRN018 - Course Attendance Status

Source Records

PS_TRAINING, PS_COURSE_TBL, PS_CRSE_SESSN_TBL

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Enrolling and Waitlisting Students"

TRN019 - Course Rating Templates

Source Records

PS_CRSE_SESSN_TBL, PS_COURSE_TBL, PS_TRAINING, PS_CRSE_SESS_DATES, PS_CRS_1ST_SESS_VW

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Administering Course Sessions," Recording Student Feedback on Course Sessions

TRN020 - Student Training History

Source Records

PS_TRAINING, PS_PERSONAL_DATA, PS_COURSE_TBL

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Tracking Student Training," Maintaining Student Training Data

TRN021 - Training Program - Course Attend. School Program

Source Records

PS_PERSONAL_DATA, PS_JOB, PS_JOBCD_TRN_PROG, PS_TRN_PROGRM_CRSE

TRN022 - Statistics of EEs Enrolled

Source Records

PS_TRAINING, PS_COURSE_TBL, PS_JOB, PS_PERSONAL_DATA, PS_DEPT_TBL PS_LOCATION_TBL, PS_COMPANY_TBL

TRN023 - Course Description

Source Records

PS_COURSE_TBL, PS_COURSE_DESCR, PS_COST_UNIT_TBL

TRN024 - Course Category

Source Records

PS_COURSE_TBL, PS_COURSE_EQUIP, PS_TRN_EQUIP_TBL, PS_COST_UNIT_TBL PS_COURSE_DESCR

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs," Setting Up Course Categories

TRN025 - Course Equipment

Source Records

PS_COURSE_TBL, PS_TRN_CATALOG_TBL, PS_TRN_CAT_TBL, PS_TRN_SUBCAT_TBL, PS_COST_UNIT_TBL

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs," Identifying Equipment and Materials

TRN026 - Course Vendors

Source Records

PS_COURSE_TBL, PS_TRN_PROV_COST, PS_TRN_VENDOR_TBL, PS_COST_UNIT_TBL, PS_COURSE_DESCR

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs," Setting Up Training Courses

TRN027 - Prerequisite Courses

Source Records

PS_COURSE_TBL, PS_TRN_PREREQ_CRSE, PS_COURSE_TBL, PS_COST_UNIT_TBL, PS_COURSE_DESCR

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs," Setting Up Training Courses

TRN028 - Target Qualifications

Source Records

PS_COURSE_TBL, PS_COURSE_COMPS, PS_COMPETENCY_TBL, PS_COST_UNIT_TBL, PS_COURSE_DESCR

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs," Setting Up Training Courses

TRN029 - (FRA) Report Training 2483

Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page.

Source Records

GROUP_2483_FRA, INDIC_2483_FRA, EDIT_2483_FRA

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "(FRA) Producing the French Training Report 2483," Running the Compute Training Report Process

TRN030 - Training Plan Summary

Budget Period	Select the period the report should cover. When you leave this field, the system displays the budget period description.
Business Unit	Select from the list.

Source Records

PS_BUDGET_BUS_UNIT, PS_TRN_BASE_CUR, PS_BUDGET_PERIOD, PS_TRN_APR_CRSE_VW, PS_TRN_SML_SUM_VW, PS_COURSE_TBL

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Planning Training Budgets for Your Organization"

TRN032 - EE Sessn Cost Summary

Before running this report, run the Compute Student Cost process, which calculates the student costs for a given budget period and selected course sessions.

The EE Session Cost Summary job runs two processes to produce the report:

- EE Session Costs (HR_TRNEECOST). This is an application engine process that extracts the costs and stores them in a temporary table (PS_TRN032_TAO). The system runs this process first to generate the data for the report.

- EE Session Cost Summary. This is an SQR process that generates the report using the data in the temporary table.

Course	Select from the list of course codes. The system displays the courses that the employee has completed. When you leave this field, the course title appears.
Session # (session number)	Select from the list.

Source Records

PS_CRSE_SESSN_TBL, PS_COURSE_TBL, PS_PERSONAL_DATA, PS_RUN_CNTL_TRN032, PS_TRN032_TAO

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Tracking Training Costs," Calculating and Tracking Student Costs

TRN033 - Training Instructor Schedule

Source Records

TRN_INSTRCT_TBL, CRSE_SESS_INSTR, COURSE_TBL, CRSE_SESS_DATES, TRN_ROOM_TBL, PERSONAL_DATA

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Administering Course Sessions"

TRN034 - Equipment Checklist

Source Records

CRSE_SESSN_TBL, COURSE_TBL, TRAINING, CRSE_SESS_DATES, TRN_RROM_TBL, TRN_FACIL_TBL, TRN_BUSHONE_VW, CRSE_SESS_EQUIP, TRN_EQUIP_TBL, TRN_ROOM_EQUIP, TRN_FACIL_EQUIP, FACIL_EQUIP_VW

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Administering Course Sessions," Planning and Setting Up Course Sessions

(FRA) TRN035 - Training Plan: Distribution

Budget Period Select the period the report should cover. When you leave this field, the system displays the budget period description.

Business Unit Select from the list.

Source Records

PS_TRN_DEMAND, PS_TRN_SIMULATION, PS_TRN_SCENARIO, PS_TRN_CATALOG_TBL, PS_BUDGET_PERIOD, PS_BUS_UNIT_TBL_HR, PS_COURSE_TBL, PS_DEPT_TBL, PS_TRN_DEMAND_EE, PS_PERSONAL_DATA, PS_JOB_CURR_VW, PS_JOB, PS_EMPL_CTG_L1

(FRA) TRN036 - Training Plan: Cost Details

Budget Period Select the period that the report should cover. When you leave this field, the system displays the budget period description.

Source Records

PS_BUDGET_BUS_UNIT, PS_TRN_BASE_CUR, PS_CURRENCY_CD_TBL, PS_TRN_DEMAND, PS_TRN_SIMULATION, PS_TRN_SCENARIO, PS_TRN_CATALOG_TBL, PS_BUDGET_PERIOD, PS_BUS_UNIT_TBL_HR, PS_COURSE_TBL, PS_DEPT_TBL, PS_TRN_DEMAND_EE, PS_JOB_CURR_VW, PS_TRN_SML_COST_VW, PS_TRN_SML_SUM_VW, PS_TRN_LST_CRSE_VW, PS_TRN_PLN_DEM_VW

See Also

PeopleSoft Human Resources PeopleBook: Administer Training, "Setting Up Training Costs," Setting Up Default Training Costs

Administer Workforce Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

CNT001 - Contract Information

Start Date, End Date The report lists all the contracts for the designated employee within the date range specified. If you leave these fields blank, the report prints all the contract history for the selected employee.

EmplID (employee ID) Enter the employee ID of the employee for whom you want to list contracts. If you leave this field blank, the report prints the contract history (within the date range you specify) for all employees.

Source Records

PS_CONTRACT_DATA; PS_PERSONAL_DATA

(USF) ES931 – Print Wage and Separation

Federal agencies are required to generate Form ES-931 reports (Request for Wage and Separation Information). State agencies use the information in this report to determine benefit eligibility for each claimant filing claims for Unemployment Compensation for Federal Employees (UCFE).

The generation of the ES-931 report is a two-part process.

1. Use the Setup Wage and Separation component to enter setup information.
2. Use this Print Wage and Separation run control page to generate the actual report.

Source Records

TAX_BALANCE, PERSONAL_DATA, PERS_NID, BALANCE_ID_DEF, EMPLOYMENT, JOB, LOCATION_TBL, GOVT_UCFE, ACTN_REASON_TBL, POSITION_DATA, GVT_ERN, ACR_CLS, GVT_ACCR_PLAN, GVT_ERN_ACR_CLS

(USF) FGSF61 - Appointment Affidavits Report

Source Records

PERSONAL_DATA, EMPLOYMENT, JOB, JOBCODE_TBL, GVT_SUBAGCY_TBL, LOCATION_TBL

(USF) FGHR015 - Union Membership

Note. Before you run this report, first run the Refresh Employees Table process.

Source Records

PS_EMPLOYEES, PS_UNION_TBL, PS_JOB_LABOR, PS_FAST_PERSGL_VW2, SOPRDEFN

(USF) FGPER810 - Award Action Data

Source Records

GVT_AWD_ACTN

(USF) FGSF75 - Request for Prel Employ Data

Job Title Enter the person's job title.

Source Records

JOB, GVT_PERS_DATA, GVT_PERS_NID, EMPLOYMENT, POSITION_DATA, JOBCODE_TBL, GVT_SUBAGCY_TBL, DEPT_TBL, LOCATION_TBL, COMPANY_TBL

(USF) FGSF5052 - Request for Personnel Action/Notice of Personnel Action

PAR Type (personnel action request) This field is available for entry only if you selected the Request for Personnel Action menu item. Select the type of PAR that you want to print.

Copies Requested

This group box is available for entry only if you selected the Notification of Personnel Action menu item. Select the copies that you want to print. Available values are **Employee**, **OPF, Payroll,** and **Utility.**

Criteria Processed

On-line Select if you want to immediately print the PARs you select.

Within Batch Program Select if you want to save your filtering criteria for later processing.

Filter Criteria

EmplID (employee ID), **SSN** (social security number), **Name, PAR Status, Department, Location, NOA Code** (nature of action) Filter actions by employee ID, employee social security number, PAR status, department, location, or NOA code.

PAR Status Date Range

PAR Status To filter by PAR status, select a status. The **Begin Date** and **End Date** fields become available when you select a PAR status.

Filter When you click this button, the system selects the records that match your filter criteria and displays them on the Select Data page.

Request/Notice of Personnel Action – Select Data Page

Filtered PAR Data

The system displays information about the PARs that it filtered based on the parameters you specified on the Parameters page. Use the check box at the beginning of each data row to select individual PARs and add them to the list of Selected PARs to Print when you click **Add Selected**. You can click the **Add All** button to add all of the PARs to the list without selecting any check boxes.

 Click this button to view the values of all of the filter criteria for this PAR.

Add All Click this button to add all PARs from the Filtered PAR Data section to the Selected PARs to Print section.

Add Selected Click this button to add the selected PARs from the Filtered PAR Data section to the Selected PARs to Print section.

Remove Selected Click this button to remove selected PARs from the Selected PARs to Print section.

Remove All Click this button to remove all PARs from the Selected PARs to Print section.

Selected PARs to Print

The system transfers the information for the PARs that you selected to add to the list. These PARs print when you run the report. If you want to remove any of the selected PARs, select the check box at the beginning of each data row and click the Remove Selected button. Remove all PARs by clicking the Remove All button.

Source Records

GVT_PAR_PRT, GVT_RQSN_POSN, GVT_NOAC_TBL, GVT_JOB, JOBCODE_TBL, GVT_PERS_DATA, GVT_EMPLOYMENT, ACTN_REASON_TBL, GVT_PERS_NID, LOCATION_TBL

OHS002 - Discipline Action Summary

Source Records

PS_DISC_SUM_VW, PS_PERSONAL_DTA_VW

OHS004 - Grievance Detail

Source Records

GRV_DETAIL_VW

OHS005 - Employee Disciplinary Action

Source Records

PS_EMP_DISACT_VW, PS_DISCIPLIN_ACTN

OHS006 - Grievance Summary Report

Source Records

PS_GRIEV_RPT_VW

PER001 - Department Action Notices

Note. Before you run this report, first run the Refresh Employees Table process.

Source Records

EMPLOYEES, EMPLOYEE_REVIEW, JOB

(CHE) PER001CH - Company Statistics

The Swiss Federal Department of Statistics requires all Swiss companies to create the Company Statistics report (*Betriebszaehlung*) every ten years in order to provide information on employee wages, occupations, and other data.

Source Records

PERSONAL_DATA, JOB, CITIZENSHIP, REG_REGION_TBL

PER002 - Employee Birthdays

Note. Before you run this report, first run the Refresh Employees Table process.

Source Records

EMPLOYEES

PER003 - Years of Service

Years of Service This report supplies a list of employees who have completed the number of years of service you specify.

Source Records

PERSONAL_DATA, EMPLOYMENT, JOB, UNION_TBL

PER004 - Emergency Contacts

Note. Before you run this report, first run the Refresh Employees Table process.

Source Records

EMERGENCY_CNTCT, EMERGENCY_PHONE, EMPLOYEES

PER005 - Employees on Leaves of Absence

Note. Before you run this report, first run the Refresh Employees Table process.

Source Records

EMPLOYEES, JOB

PER006 - Mailing Labels

Note. Before you run this report, first run the Refresh Employees Table process.

Source Records

EMPLOYEES, COUNTRY_TBL

PER007 - Temporary Employees

Source Records

EMPLOYMENT, JOB, PERSONAL_DATA

PER010 - Employee Turnover Analysis

This report orders employees by:

- Department
- Employee name
- Employee ID

Source Records

JOB, PERSONAL_DATA

PER015 - Personnel Actions History

Show Components?	Select if you want your report to display compensation component information.
Actions	The report lists all employees affected by each of the job actions you enter.

Source Records

EMPLOYMENT, JOB, PERSONAL_DATA

PER020 - Employee Home Address Listing

Source Records

PERSONAL_DATA

PER021 - Pending Future Actions

Show Components? Select **Show Components?** if you want your report to display compensation component information.

Source Records

EMPLOYMENT, JOB, PERSONAL_DATA

PER029 - Database Audit

Source Records

PSAUDIT, PSRECFIELD

PER032 - Passport/Visa Expiration

The first section of the report lists passport information: employee ID and name, dependent ID and name, country, passport number, issue date, and expiration date. The second section of the report lists visa and work permit information: employee ID and name, dependent ID and name, country, visa and work permit number, type of permit, issue date, and expiration date. There is a page break between the first and second sections of the report.

Source Records

CITIZEN_PSSPRT, DEPENDENT_BENEF, PERSONAL_DATA, VISA_PMT_DATA

PER033 - Citizenship/Country/Visa Audit

The report flags six different types of discrepancies. Specifically, it flags employee records when the following pairs of data exist:

Citizenship Status	*Country of Citizenship*	*Visa Record*
Native or Naturalized.	Not the local country.	
Not Native or Naturalized.	The local country.	
Native or Naturalized.		Exists for the local country.
Not Native or Naturalized.		Doesn't exist for the local country.
	The local country.	Exists for the local country.
	Not the local country.	Doesn't exist for the local country.

The report puts a page break between categories.

Source Records

CITIZENSHIP, INSTALLATION, PERSONAL_DATA, VISA_PMT_DATA

(NLD) PER038NL - Law SAMEN Statistics

Year Enter the year the report should cover.

Source Records

PERSONAL_DATA, WBEAA_CNTRY_TBL, DIVERSITY, XLATTABLE

(GER) PER039GR - GER Heavily Disabled

Year The report prints a list of heavily disabled employees for the year specified.

Source Records

PS_DISABILITY_GER, PS_GP_SI_DUEVO_GER, PS_JOB, PS_PERSONAL_DATA, PS_SET_CNTRL_REC

PER040GR - GER Heavily Disabled Equaliz. Report

Year Specify a year for the report.

Source Records

PS_COMPANY_TBL, PS_DEPT_TBL, PS_DISABILITY_GER, PS_JOB, PS_JOB_LABOR, PS_LOCATION_TBL, PS_SETID_TBL, PS_SET_CNTRL_REC

(ITA) PER053 - ITA Equal Opportunities

Desired Reports

Table 1-8 Select the Equal Opportunities report tables you want to populate. The Equal Opportunities report tables are defined in the Italy Equal Opportunities Report section.

Productive Units

Productive Units Select the productive units of the employees on whom you're reporting.

Table 1. Informazioni Generali Sull'azienda.

Table 1 contains the following information:

- Company and location information.
- Total number of employees as of December 31st of the second year of the period reported.
- Economic activity, including IVA organization codes.
- All CCNL information that applies.

Table 2. Informazioni generali sulle unitá nell'ambito comunale.

Table 2 contains the following information:

- Location address.
- Total number of employees at that location as of the reporting date.
- Number of employees as of December 31st of the second year of the period reported.

Table 3. Entrate e uscite nel biennio.

Table 3 contains the following information:

- Number of employees as of December 31st of the first year of the period reported.
- The number of hires as of December 31st of the first year of the period reported.
- The number of terminations as of December 31st of the first year of the period reported.
- Number of employees as of December 31st of the second year of the period reported.

Table 4. Occupati al 31.12 del secondo anno del biennio e promozioni e assunzioni nell'anno.

Table 4 lists the number of employees in each of the following categories: dirigenti, quadri, impiegati, and operai. Within each category, the report lists the number of employees per category level.

Table 5. Occupati al 31.12 del secondo anno del biennio per tipo contratto. CIG e aspettativa

Table 5 lists, per contract type, the number of employees in each of the following categories: dirigenti, quadri, impiegati, and operai.

Table 6. Elenco delle entrate, uscite e trasformazioni contratto (secondo anno del biennio)

Table 6 contains the following information listed by category (dirigenti, quadri, impiegati e operai):

- Hires, including employees transferred from another location of the company, employees changed from another category, and new hires.
- Terminations, including employees transferred to another location of the company, transferred to another category, and termination of the labor relation (pension, resignation, contract expiration, individual or collective dismissal, death, and disability).
- Contract changes, including from *Determine Period* to *Undetermined,* from parttime to fulltime, and vice versa.

Table 7. Formazione del personale svolta nel corso del secondo anno del biennio

Table 7 contains the following information listed by category (dirigenti, quadri, impiegati, and operai):

- Number of training participants.
- Total of hours of training participation per category.

Table 8. Retribuzione annua (secondo anno del biennio) per livello e categoria professionale

- The annual gross salary amount subdivided by category (dirigenti, quadri, impiegati, and operai) and contractual level.

Source Records

PS_JOB, PS_PERSONAL_DATA, PS_TRAINING, PS_COURSE_TBL, PS_COMPANY_TBL, PS_UNITA_PROD_TBL, PS_WKF_CNT_TYPE, PS_EMPL_CTG_L1, PS_EMPL_CTG_L2, PS_TRV_ACTRSN_ITA,

PER059 - ITA Union Report

Language	Select the language of the report.
As of Date	Indicate the data as of which the system should collect union disability information.

Source Records

PERSONAL_DATA, JOB

(ESP) PER054 - Official List

The Spanish government requires organizations that do business in Spain to keep a Matricula Book, an official company registry of employee-related data. You maintain the book both at the company level and by work site. While you don't have to report information from the Matricula book to the government, a government inspector making an on-site inspection may ask to review the Matricula book.

The Official List report includes the following information for each employee:

- Matricula number.
- Employee - first surname.
- Employee - second surname.
- Employee - first name.
- Gender.
- Marital status.
- Birth date.
- Birth city.
- Birth province.
- Social Security number.
- Hire date.
- Professional category and date (this may result in multiple entries if the employee's category changes).
- Social Security category (Tarifa de Cotizacion).
- Termination date.
- Comments.

Matricula Book Type	Select whether to run the report for ***All*** matricula books, which includes historical employee data, or for the ***Current*** book only, which includes only current data.

Source Records

PERSONAL_DATA, JOB, PERS-NID, EMPLOYMENT

(ESP) PER055 - Union Fees

Source Records

JOB, JOB_LABOR and PERSONAL_DATA

PER058 - Primary Job Audit

One important reason to designate primary and secondary jobs is to create accurate data for regulatory reporting. By running reports for an employee's primary job only, you create an accurate employee count for affirmative action and other government reports. However, the flexibility PeopleSoft Human Resources gives you to designate primary and secondary jobs could compromise the accuracy of your reporting data. It's possible to have employees who have no job designated as a primary job, or more than one primary job, or an inactive job designated as the primary job. We recommend checking regularly to correct these kinds of discrepancies in your employee job records. Use the Primary Job Audit report to check for discrepancies in the primary job designation for employees with multiple jobs.

This report lists all employees and/or nonemployees whose job records show the following potential problems:

- Multiple primary jobs: More than one active job is currently designated as a primary job.
- Terminated primary job: The primary job was terminated and a nonprimary job is the active job.
- No primary job: None of the person's concurrent jobs has been chosen as the primary job.

Personnel Status Select a personnel status to run the report for employees only or non-employees only. If you don't choose an option, the system runs the report for both employees and non-employees.

Source Records

PERSONAL_DATA; JOB; PS_JOB_DATE_VW; PS_FAST_PERSGL_VW2

(ITA) PER060 - ITA Disability

Report Request Parameter(s)

As of Date Indicate the date as of which the system should collect employee disability information.

Annual Select this option if you want to run the annual report, listing the number of disabled employees sorted by disability type and gender.

Name List Select this option if you want to run the report listing the names of disabled employees by location and gender.

Statistics Select this option if you want to run the report listing by location and the number of disabled and able-bodied employees. Part and fulltime disabled employees are counted as one. Parttime, able-bodied employees are counted using their full time equivalent (FTE) value. If an able-bodied employee has an FTE value of 0.5, then that

employee is counted as 0.5 on this report. Fulltime, able-bodied employees are counted as 1.

Run Control Locations

SetID Select the setID of the company on whose disability statistics you are reporting.

Location Code Select the location code of the location on whose disability statistics you are reporting.

Run Click to run the report using Process Scheduler.

Source Records

PERSONAL_DATA, DISABILITY, JOB

PER061 - Labor Relations Letters

Create Labor Relations letters in your word processor by directly accessing the data you need from your database.

Select whether to generate the letter in the language specified or in the language of the recipient.

PeopleSoft Human Resources provides the following four standard Labor Relations Letters.

Purpose of Letter	*Letter Code*	*Data Extract File*	*Word Letter Template*
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

Source Records

PS_DISCIPLIN_LTR, PS_DISCIPLIN_ACTN, PS_DISCIP_TYPE_TBL, PS_GRIEVANCE, PS_GRIEVANCE_STEP, PS_RESLTN_TYPE_TBL, PS_R_PER061, PS_PERSONAL_DATA

(CAN/USA) PER009 - Union Membership Report

Source Records

PS_EMPLOYEES, PS_UNION_TBL, PS_JOB_LABOR, PS_FAST_PERSGL_VW2, SOPRDEFN

Note. Before you run this report, first run the Refresh Employees Table process.

(JPN) PER063JP – JPN Appointment Notification

Report headings vary according to the Action/Reason combination. Enter free-form text and a company official's title and name to appear on the report, and select the action and reason combinations on which you want to report.

Language — Select the language you want the report to be in.

As of Date — This is the effective date of employees' job data rows that the system will search and report on. It appears on the report as the Announcement Date.

Note. For Retirement notifications, you should enter the effective date of the retirement row on the employee's Job record. The system will set the Announcement Date on the printed notification as the **As of Date** minus 1 day, the same as the Termination Date on the employee's Employment Dates page.

Company — Select your company code. The company description defaults into the **Published by** field.

Notification Statements — This free-form text field is for comments you want to appear as an introduction to the list on the report: for example "Hiring order is as follows."

Publish Date — This date, which appears on the report, is the date your organization wants as the official publication date of the Appointment Notification.

Published by — This will initially display the description of the company you entered, but you can override the default with a free-form description of, for example, your HR department if that's what you want to appear on the notification.

Representative Title — This also defaults from the company table. You can overwrite the default. This is the title of the company's representative that will appear on the notification.

Representative Name — This also defaults from the company table. You can overwrite the default. This is the name of the company's representative that will appear on the notification.

Action — Select an action from the drop-down list box that you want to report on. The drop-down list box will contain all actions in the system, but you can only select the following:

Hire, Rehire, Transfer, Promotion, Retirement

Use All Action Reasons — Select unless you wish to select individual reasons for the action you entered in the **Reason Code** grid below the check box. Even if you have selected individual reasons in the grid, if this check box is selected, you will get all reasons, so you don't have to clear the grid if you change your mind.

Note. You only need to select reasons (individual or "Use All…") for actions ***Hire, Rehire*** and ***Retirement.*** For actions ***Transfer*** and ***Promotion,*** the system automatically populates the **Reason Code** field. However, the process reports only Job rows that do have a **Reason Code.** If a Job row has **Action** = ***Hire, Rehire, Retirement, Transfer,*** or ***Promotion*** but no **Action Reason,** it is not reported.

Reason Code — Select all the reasons for the action you entered that you want the report to include. If the **Use All Action Reasons** check box is clear, you must enter at least one reason in this field. The system displays the description of each reason you select. See the Note above that discusses the **Use All Action Reasons** field.

Source Records

PERSONAL_DATA, COMPANY TBL, JOB, SUPVLVL_TBL_JPN

(JPN) PER064JP - JPN Appointment List

This report lists all employees who have been hired, rehired or retired, transferred or promoted. The information the report provides varies according to the Action/Reason combination you enter on the Appointment List report page.

You can enter free-form text and a company official's title and name to appear on the report, and you can select the action and reason combinations you want to report on.

Language — Select the language you want the report to be in.

As Of Date — This is the effective date of employees' job data rows that the system will search and report on.

Note. For ***Retirement*** listings, you should enter the effective date of the Job retirement row. The system will set the Announcement Date on the printed list as the **As Of Date** minus 1 day, the same as the Termination Date on the employee's Employment Dates page.

Company Select your company code. Unlike for Appointment Notification, the company description will *not* default into the **Published by** field.

Publish Date This date, which appears on the report, is the date your organization wants as the official publication date of the Appointment List.

Published by Enter a free-form description of the publishing department such as your Human Resources department.

Action Select an action from the drop-down list box that you want to report on. The drop-down list box will contain all actions in the system, but you can only select the following:

Hire, Rehire, Transfer, Promotion, Retirement

Refer to the Tree Manager Select this check box if you want the system to sort the listing using your DEPT_SECURITY tree and, depending on the **Action/Reasons,** your SUPERVISOR_LEVEL tree.

This is how the system sorts your listing when you select **Refer to the Tree Manager:**

- For **Actions *Hire*** and ***Rehire,*** the system uses only the DEPT_SECURITY tree.
- For **Actions *Transfer*** and ***Retirement,*** the system uses both the DEPT_SECURITY tree and the SUPERVISOR_LEVEL tree.
- For **Action *Promotion,*** the system sorts by Salary Plan, Salary Grade, and Employee ID whether the check box is selected or clear. Trees have no effect.

If **Refer to the Tree Manager** is clear, the system sorts the list by Employee ID.

Note. Employees who do not have a supervisor level appear in the list by Department, with the Supervisor Level column blank. They are sorted by Employee ID, after all the employees who do have a supervisor level.

Use All Action Reasons Select this check box unless you want to select individual reasons for the action you entered in the **Reason Code** grid below the check box. Even if you have selected individual reasons in the grid, if this check box is selected, you will get all reasons, so you don't have to clear the grid if you change your mind.

Note. You need to select reasons only for actions ***Hire, Rehire,*** and ***Retirement.*** For actions ***Transfer*** and ***Promotion,*** the system automatically populates the **Reason Code** field. However, the process reports only

	Job rows that do have an Action Reason. If a Job row has **Action** = ***Transfer*** or ***Promotion*** but no Action Reason it will not be reported.
Reason Code	Select all the reasons for the action you entered that you want the report to include. If the **Use All Action Reasons** check box is clear, you must enter at least one reason in this field. The system displays the description of each reason you select. See the Note above for the **Use All Action Reasons** field.

Source Records

PERSONAL_DATA, COMPANY TBL, DEPT_TBL, JOB, SUPVLVL_TBL_JPN, SAL_PLAN_TBL, SAL_STEP_TBL, LOCATION_TBL, EMPL_STATUS

(JPN) PER065JP - JPN Completion of IC Transfer

The home company uses this report in order to confirm employees who are anticipated to return from temporary intercompany transfer.

Source Record

INTCPNY_TRN_JPN

(BEL) PER067BEL - Social Report

Source Records

COMPANY_TBL, PERS_REGIST_BEL, PERS_DATA_EFFDT, JOB, EMPLOYMENT, CONTRACT_DATA, WKF_CNT_TYPE

Common Elements Used in the Canadian Administer Workforce Reports Pages

Can OEE Area Cd (Ontario Employment Equity area code)	Select and area code. These codes are the CEC management codes defined in the location table. If more than one code is required, separate them with commas (for example, 01, 02).

(CAN) PER100CN - CAN Hire List Report

Source Records

PERSONAL_DATA, JOB, LOCATION, PERS_NID

(CAN) PER103CN – OEE Groups by OCC Group

Source Records

CAN_OEE_SURVEY, JOB, JOBCODE_TBL, CAN_NOC_TBL, LOCATION_TBL

(CAN) PER104CN - OEE Groups by Employment Type

Source Records

CAN_OEE_SURVEY, JOB, JOBCODE_TBL, LOCATION_TBL

PER105CN - OEE Work Force Survey Stats Report

Source Records

CAN_OEE_SURVEY, JOB, LOCATION_TBL

(CAN) PER106CN - OEE Groups/Jobs Filled/Vacatd

Source Records

JOB, CAN_OEE_SURVEY, JOBCODE_TBL, LOCATION_TBL, CAN_NOC_TBL

PER506 - Dept Tbl/Security Tree Audit

Source Records

PSTREENODE, DEPT_TBL

PER706A - Salary Grade Table

Source Records

SAL_PLAN_TBL, SAL_GRADE_TBL

PER706B - Salary Grade/Step Table

Show Components? Select if you want your report to display compensation component information.

Source Records

SAL_PLAN_TBL, SAL_GRADE_TBL, SAL_STEP_TBL

PER710 - Action Reason Table

Source Records

ACTN_REASON_TBL

PER801SG – Employee Listing Report

Provides employee information based on the run control selections of Department, Employee Name, or Employee ID.

- If Department, it selects Department Name, Employee ID, Employee Name, Sex, Birthdate, Job Title (sorted by Department).
- If Employee ID, it selects Employee ID, Employee Name, Sex, Birthdate, Department Name, Job Title (sorted by Employee ID).
- If Employee Name, it selects Employee Name, Employee ID, Sex, Birthdate, Department Name, Job Title (sorted by Employee Name).

Source Records

PS_EMPLOYEES regardless of what selection is used; PS_RUN_CNTL_HR for selection parameters

TAS001 – Temporary Assignments w/out End Date

Source Records

PS_JOB, PS_JOB_JR, PS_PERSONAL_DATA

TAS002 – Temporary Assignments due to Complete

Source Records

PS_JOB, PS_JOB_JR, PS_PERSONAL_DATA

Manage Commitment Accounting Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphanumerically by report ID.

BUD001 - Department FTE

Department FTE Report Params (department full time equivalent parameters)

Output File Enter the file name you want the system to write the FTE budget data to.

Source Records

JOB_DATA, DEPT_BUDGET_FTE

BUD009 - Encumbrance Messages

Department ID (or "ALL") Enter the department ID whose encumbrance messages you are reporting. Enter ***ALL*** to report on all departments in the selected **SetID.**

Source Records

ENCUMB_DEFN, ENC_MESSAGE_TBL

BUD011 - Funding Summary

Funding Summary Rpt Parameters (funding summary report parameters)

Funding Summary By Indicate if you want the funding summary to list information by ***Appointment Level*** or by ***Position Level.***

Report Option Indicate if you want the report to summarize funding for ***Earnings, Deductions,*** or ***Tax.***

Position Number If you want the system to report on the funding summary for a single position, enter the position number on which you want to report.

Source Records

POOL_TBL, DEPT_BUDGET_ERN, DEPT_BUDGET_DED, DEPT_BUDGET_TAX, JOB_DATA

BUD012 - FTE Rollup

FTE Roll Up

Sum FTE of lower level departments — Select if you want the system to roll up the FTE counts of the departments that roll into the **Department** you selected above.

List Details or Summary

List Details or Summary — Select if you want the FTE Rollup report to list ***Summary*** or ***Details*** information.

Source Records

DEPT_BUDGET_FTE, JOB_DATA

BUD020 - Retro Distribution

Run Control ID — Select the Run Control ID of the Create Retro Distribution Transactions process on which you want to report.

Create User Id — Select the Create User ID of the retroactive processes on which you want to report.

Error Status — Select the error status of the retroactive transactions on which you want to report.

Process Status — Select the process status of the retroactive transactions on which you want to report.

Create Date Range

Start Date and **End Date** — Select the created date range of the transactions on which you want to report on.

Processed Date Range

Start Date and **End Date** — Select the processed date range of the transactions on which you want to report.

Source Records

PS_ACCT_CD_TBL, PS_BUS_UNIT_TBL_HR, PS_CAL_DETP_TBL, PS_COMPANY_TBL, PS_COMPNY_TBL_LANG, PS_DEPT_ACTIVITY, PS_DEPT_BUDGET, PS_DEPT_BUDGET_CTX, PS_DEPT_BUDGET_DED, PS_DEPT_BUDGET_DT, PS_DEPT_BUDGET_ERN, PS_DEPT_BUDGET_TAX, PS_DEPT_OFFSET_GRP, PS_DEPT_TBL, PS_GL_JRNL_TMPLT, PS_HP_CTX_ACCT_DTL, PS_HP_DED_ACC_RULE, PS_HP_DED_ACC_TMPL, PS_HP_DED_ACCT, PS_HP_DED_ACCT_MAP, PS_HP_ERN_ACC_RULE, PS_HP_ERN_ACC_TMPL, PS_HP_ERN_ACCT, PS_HP_ERN_ACCT_MAP,

PS_HP_FRINGE_GROUP, PS_HP_RC_PDAUDIT, PS_HP_TAX_ACCT_DTL, PS_INSTALLATION, PS_JOB, PS_JOBCODE_TBL, PS_PAY_CALENDAR, PS_PAY_DEDUCTION, PS_PAY_EARNINGS, PS_PAY_OTH_EARNS, PS_PAY_TAX, PS_PAY_TAX_CAN, PS_PAYGROUP_TBL, PS_POSITION_DATA, PS_PROJECT, PS_SET_CNTRL_REC, PS_STRINGS_TBL, PS_TL_PAYABLE_TIME, PS_TL_TASKGRP_TBL, PSDBFIELD, XLATTABLE

HPCA010 - Predistribution Audit

Pay Run

Pay Run ID — Select the pay run ID of the pay run you will audit.

Audit Level

General Audit — Select to have the system verify that department budgets have been set up for the transactions in the selected pay run.

Specific Employer paid Earning/Deduction/Tax Codes — Select to have the system verify that department budgets have been set up for specific Earnings/Deductions/Tax codes for the transactions in the selected pay run.

Audit Project/Grant — Select to have the system verify that the project/grant specified on the Account Code table has been defined.

Source Records

PS_RUN_CNTL_BUD020, PS_HP_RDIST_TRANS, PS_HP_RDIST_ERN, PS_HP_RDIST_ERNDAT, PS_HP_RDIST_DED, PS_HP_RDIST_DEDDAT, PS_HP_RDIST_TAX, PS_HP_RDIST_TAXDAT, PS_HP_RDIST_CTX, PS_HP_RDIST_CTXDAT

HPCA012 - Fringe and Gross Costs

All Company & Paygroup, **Company**, and **Pay Group** — Select **All Company & Paygroup** to process all companies and pay groups or leave clear and select a company and pay group for processing. If you select only a company the system will report on all pay groups in the selected company.

All Department, and **SetID**, **Department** — Select **All Department** to process all departments or leave clear and select specific departments for processing.

All Funding Sources and **Account Code** — Select **All Funding Sources** to process all account codes or leave clear and select specific account codes for processing.

All Projects and **Project Grant** — Select **All Projects** to process all projects or leave clear and select specific projects for processing.

Report Option

Column Definition Code	The system will summarize the fringe and gross data using the column definition code that you select.
Detail Report and **Summary Report**	Indicate if the system should produce a detail or a summary report. A detail report lists gross and fringe data by employee and a summary report will print the summary total based on the sort option you select in the Sort Option group box.

Sort Option

By Fiscal Year & Acct Period and **By Department**	Select to sort the report data by fiscal year and account period or by department. Select both options to sort first by fiscal year and accounting period and then by department.
Secondary Sort Sequence	Select a secondary sort sequence to sort after fiscal year and accounting period and department.
Detail Report Sort Sequence	If you opt to create a detail report, you can select an additional sequence level.

Source Records

PS_HP_COL_DEFN_COL, PS_HP_COL_DEFN_DTL, HP_GRSFRG_DATA

Track Faculty Events Reports: A to Z

This section provides detailed information on individual reports, including important fields and source records. The reports are listed alphabetically by report ID.

HRH905CN - StatsCan FT Survey

After you submit your full-time and part-time Academic Teaching Survey report flat files to Statistics Canada, you receive a summary report from Statistics Canada. Use the StatsCan FT Survey report to compare your results with Statistics Canada's summary.

The report consists of four pages; each includes full-time survey salary calculations based on different selection criteria:

- Including administrative posts and medical and dental categories.
- Including administrative posts, excluding medical and dental categories.
- Excluding senior administrative duties, including medical and dental categories.
- Excluding senior administrative duties and medical and dental categories.

Reporting Period, Start	Displays values from the survey that matches the run

Date, and **End Date**	control ID. Maintain reporting periods on the Reporting Period Table page.

Source Record

PS_HP_FT_SURVEY

PER045 - Faculty Events

Source Records

EG_EMPL_TENURE, JOB_DATA, EG_ACTIVITIES, EG_ADMIN_POSTS, SCHOOL_EDUCATION, EDUCAT_TRAIN_GBL, EG_HONORS_AWARDS, LICENSES_CERTIFS, MEMBERSHIPS, EG_PRESENTATIONS, PUBLICATIONS, EG_SPECIAL_PROJECT, EG_ADVISEMENT, EG_TEACHING_RESP

PER046 - Case Review

Source Records

EG_EMPL_TENURE, JOB_DATA, EG_CASE_REVIEW, EG_ REVIEW_DATA

PER047 - Employee Tenure Status

Source Records

EG_EMPL_TENURE, JOB_DATA

PER050 - Tenure Calc

Before using this report, you must run the tenure calculation process at least once. You can run this report based on calculation name, or based on the business unit, department, and service calculation group.

CalculationName (Blank for all): **Business Unit (Blank for all):** **Department (Blank for all):** **EmplID (Blank for all):** (employee identification)	The system automatically populates these fields with values from the Tenure Calc process associated with the run control ID you entered. To include all values for a field, leave that field blank.

Svc Calc Grp (Blank for all): (service calculation group)

Source Records

EG_SVC_HIST, JOB_DATA

PER051 - Tenure Service List

With this report, you can list employees by calculation group and within tenure service accruals between specific years. You can also sort by ascending or descending service time.

Note. When you commit data to the service history by running the Tenure Calc process in Update to History mode, the system purges information from the temporary file. If you run this report for a calculation group you've just committed to the service history, there is no output.

Department (Blank for all):

Svc Calc Grp (Blank for all):

Type of Service (Blank for all):

Select the values that identify which employees to include in the report. To include all values for a field, leave that field blank.

Source Records

EG_EMPL_TENURE, JOB_DATA, EG_PRIOR_EXP

Administer Company Cars Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

(GBR) CAR002 - Print P11D Section A

Before using this page, you must have run the CAR001 report process.

Tax Year End

The tax year end date is defined on the Translate able.

Empl ID (employee ID)

Leave this field blank to run the report for all eligible employees, or enter an ID to run the report for only one employee.

Employment Record Number	Leave this field blank to run the report for all employee records, or enter an employment record number to run the report on only one employee record.

Source Records

P11D_SEC_A_UK, PERSONAL_DATA, RUN_CNTL_CAR

Note. The following report from the PeopleSoft Human Resources Manage Competencies business process is also available on the Administer Training menu: PER703 Course Table.

Manage Competencies Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

CMM007 - Licenses, Certificates Renewal

Source Records

LIC_CERTIF_TBL, ACCOMPLISHMENTS, ACCOMP_TBL

(GBR) NVQ001 - UK NVQ - Employee Status

Source Records

NVQ_PROG, ACCOMPLISHMENTS, ACCOMP_TBL

(GBR) NVQ002 - UK NVQ - Unit Listing

Source Record

COMPETENCY_TBL

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "(GBR) Managing National Vocational Qualifications"

(GBR) NVQ003 - UK NVQ - NVQ Listing

Source Record

ACCOMP_TBL

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "(GBR) Managing National Vocational Qualifications"

(GBR) NVQ004 - UK NVQ - Unit/Element Listing

Source Records

COMPETENCY_TBL, NVQ_ELEMENT_TBL

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "(GBR) Managing National Vocational Qualifications"

(GBR) NVQ006 - UK NVQ - Employee Plan

Source Records

NVQ_TEMP, ACCOMP_TBL, PERSONAL_DATA

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "(GBR) Managing National Vocational Qualifications"

PER011 - Competency Inventory

Before you run this report, first run the Refresh Employees Table process to include any new employees and their associated competencies. Use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report.

Source Records

PS_EMPLOYEES, PS_COMPETENCIES, PS_COMPETENCY_TBL

See Also

PeopleSoft Human Resources PeopleBook: Manage Workforce, "Updating Workforce Information," Refreshing the Employees Table for Accurate Reporting

PER537 - Competency Listing

Source Records

COMPETENCY_TBL, COMPETENCY_TYPS, CM_TYPE_TBL

PER538 - Accomplishment Listing

Degree Detail	Select to include full details of a degree.
License/Certification Detail	Select to include full details of licenses and certifications.

Source Records

PS_ACCOMP_TBL, PS_COUNTRY_TBL

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments," Tracking Licenses and Certification

PER704 - License/Certification Table

Source Records

LIC_CERTIF_TBL, ACCOMP_TBL

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments," Tracking Licenses and Certification

Manage Performance Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

CMP002 - Appraisals by Evaluation Points

You use evaluation points to assign value to the responsibilities of each job title in your agency and thus a compensation value to each salary grade. It also includes salary survey information and associated point ratios and midpoints.

Source Records

JOBCODE_TBL, SAL_GRADE_TBL, SAL_PLAN_TBL

PER008 - Employee Appraisal Audit

For each employee, it displays the hire date, employee type salaried, hourly, exempt hourly, job code, and title. For each review, it lists the reviewer's name, review rating, and any action taken as a result of the review. The system calculates an average review rating by averaging all previous review ratings.

Use this report as a reminder to schedule interviews.

Source Records

EMPLOYEES, EMPLOYEE_REVIEW, REVIEW_COMMENTS

Manage Positions Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

FG0F8 - (USF) 0F8

This optional form provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.

Source Records

PS_GVT_POS_DES_TBL, PS_POSITION_DATA, PS_JOBCODE_TBL, PS_PERSONAL_DATA, PS_JOB, PS_DEPT_TBL, PS_AGENCY_TBL, PS_GVT_SUBAGCY_TBL, PS_LOCATION_TBL

FGHR009 - (USF) Job Code/Position Audit

Source Records

POSITION_DATA, JOBCODE_TBL, DEPT_TBL, LOCATION_TBL, GVT_SUBAGCY_TBL

FGHR010 - (USF) Vacant Position

Source Records

POSN_VACANT, DEPARTMENT_SRCH

FGHR025 - (USF) Active/Inactive Position

Active Opt (active option) — Select one of the following options in this field.

Active: To report on active positions only.

Both: To report on both active and inactive positions.

Inactive: To report on inactive positions only.

Active Positions — Select if you want to report on the active positions in your organization.

Inactive Positions — Select if you want to report on the inactive positions your organization.

Source Records

POSITION_DATA, POSITION_SRCH

FGHR026 - (USF) Incumbent History

Show Components? — Select if you want the report to display compensation component information for each incumbent.

Source Records

JOBCODE_TBL, PERSONAL_DATA, POSITION_DATA, POSN_HISTORY, POSN_HISTORY2, POSN_HISTORY3

FGHR027 - (USF) Active Position History

Source Record

POSITION_DATA

FGHR028 - (USF) Exception/Override

Exception/Override Indicate if you want to run an *Exception* or *Override* report. When you select *Override* the report will print incumbent job data where you have prevented automatic cross updating from occurring. When you select *Exception,* the report will print only exceptions where the incumbent job and position data is out of sync for other reasons.

Source Records

EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA, POSITION_DATA

FGOCC800 - (USF) Occupation Series

Source Record

GVT_OCCUPATION_TBL

FGPER815 - (USF) Position Title Table

Source Record

POSITION_DATA

FGPOS819 - (USF) Job Code Text

Source Records

POSITION_DATA, JOBCODE_TBL, DEPT_TBL, LOCATION_TBL, GVT_SUBAGCY_TBL

POS001 - Position Status

Source Records

EMPLOYMENT, JOB, JOBCODE_TBL, JOB_REQUISITION, JOB_REQUIS_TYP, PERSONAL_DATA, POSITION_DATA

POS002 - Active/Inactive Positions

Active Positions — Select if you want to report on the active positions in your organization.

Inactive Positions — Select if you want to report on the inactive positions in your organization.

Source Records

POSITION_DATA, POSITION_SRCH

POS003 - Incumbent History

Show Components? — Select if you want the report to display compensation component information for each incumbent.

Source Records

JOBCODE_TBL, PERSONAL_DATA, POSITION_DATA, POSN_HISTORY, POSN_HISTORY2, POSN_HISTORY3

POS004 - Active Position History

Source Record

POSITION_DATA

POS006 - Indented Position

Before you can run this report, you must run the utility Build Position Structure, which links the positions in the system and creates the reporting hierarchy represented in this report.

Rpt Lvl (report level) — Enter the highest report level you want reported on. For example, if you have 10 report levels and you only want to report on the bottom 5, enter *5* in the Rpt Lvl field.

Source Records

JOB, POSITION_DATA

POS006A - Build Position Structure

After you enter all the reporting relationships among positions in the Position Data component, run this SQR. The Build Position Structure report enters a value in the ORG_CODE field and defines the position in the hierarchy. When you run the Build Position Structure report the system updates the position structure with data valid before or on the As of Date you specify.

You should run this report when you first enter the reporting relationships, any time you add new positions, and when you change reporting relationships among existing positions. You must run this SQR before you can run the Indented Position Hierarchy report, POS006.

When you run Build Position Structure, the system may generate one or more diagnostic messages to help you understand the utility output. They are as follows:

- If the utility doesn't find a root position (a position that reports to itself), it displays an error message. If you do not have a root node, the utility can not produce a report.
- If you have circular reporting conditions, such as when position 1 reports to position 2, and position 2 reports to position 1, the utility displays a warning message and the positions will not appear in the report.
- If you do not have data in the Reports To Position field for a position, the utility displays a warning message. These positions will not appear in the report.

Source Records

POSITION_DATA

POS007 - Vacant Position

Source Records

POSN_VACANT, DEPARTMENT_SRCH

POS008 - Exception/Override

You can print incumbent job data where you have prevented automatic cross-updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions).

The Exception/Override report lists the position name and the name of the employee assigned to the position and shows the data in the fields that match in the Position Data component and

Job Data component. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*

When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints *Match* or *No Match* in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.

Exception/Override Indicate if you want to run an *Exception* or *Override* report. When you select *Override* the report will print incumbent job data where you have prevented automatic cross updating from occurring. When you select *Exception,* the report will print only exceptions where the incumbent job and position data is out of sync for other reasons.

Source Records

EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA, POSITION_DATA

Manage Professional Compliance Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

PCMP002 – Compliance Plan

Company Specify the company for which you want to run the compliance plan report.

Compliance Plan Year Specify the year for which you want to generate the compliance plan report.

Note. This year is the year you associated with a company compliance plan on the Company Compliance – Compliance Plan page.

Source Records

PCMP_COMP_VW, PCMP_CMP_PLAN, PCMP_CMP_PLANA

PCMP003 – RI Observation

EmplID Select the EmplID of the regulated individual whose observation you want to review.

Observation Date Enter the date of the observation for which you want to generate the report.

	Note. You can view all the dates on which you entered observations for an individual on the RI Observation page.
Professional Compliance Type	This field displays the regulated individual's professional compliance type.
Regulatory Authority	This field displays the regulated individual's regulatory authority.
Observation Model	This field displays the regulated individual's observation model.

Source Records

PCMP_TYPE, PCMP_REG_AUTH, PCMP_CLASS, PCMP_OBS_MODEL, PCMP_RI_OBS_COM, PCMP_RI_OBSECOM, PCMP_OBS_ELEM

See Also

PeopleSoft Human Resources PeopleBook: Manage Professional Compliance, "Monitoring Regulated Individuals," Observing Regulated Individuals

PCMP004 – RI Review

EmplID	Select the EmplID of the regulated individual whose review you want to see.
Creation Date	Enter the creation date of the development plan. This is the date you enrolled the regulated individual in the development plan against which his/her performance has been assessed. **Note.** You can view the creation dates for a regulated individual's development plans on the Development Record page.
Professional Compliance Type	This field displays the regulated individual's professional compliance type.
Regulatory Authority	This field displays the regulated individual's regulatory authority.

Source Records

PCMP_TYPE, PCMP_REG_AUTH, PCMP_CLASS, PCMP_RI_DEVRCOM, PCMP_RI_DEVACOM, PCMP_RI_DEVAREA

See Also

PeopleSoft Human Resources PeopleBook: Manage Professional Compliance, "Monitoring Regulated Individuals," Understanding the Monitoring Process and Reviewing Regulated Individuals

Administer Salary Packaging Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

PKG003 - Salary Packaging - Models Due for Review

Selection Criteria

By Department and **By Pay Group** — Enables you to search for employees with packages ready for review within a specific department or pay group.

Source Records

PKG_MDL_TBL, PERSONAL_DATA, JOB, JOB_JR

PKG004 - Salary Package Model

Report Request Parameters

Package Status — While you run this report on an employee only basis, you can select which type of **Package Status** you want to report on. You define the **Package Status** on the Package Model page for each salary package.

Current

After you've confirmed and enrolled a package for an employee, the system changes the **Package Status** to ***Current.***

History

When the **Package Status** is ***History***, you're looking at an employee package that has been confirmed and enrolled, but is no longer in effect.

Proposed

When you first begin modeling a package for an employee, the system automatically sets **the Package Status** to ***Proposed***.

Source Records

PKG_MDL_TBL, PERSONAL_DATA, COMPANY_TBL, DFLT_FREQUENCY, FREQUENCY_TBL, PKG_MDL_BSE_CMP, PKG_BSE_CMP_TBL, PKG_MDL_ADD_CMP, PKG_ADD_CMP_TBL

PKG006 - Salary Packaging FBT Reconciliation

For reporting purposes you need to identify all the different categories of fringe benefits and the taxable value of the benefits. In the FBT Reconciliation report, all FBT categories are identified, based on the component types you define on the Package Component table component. For each component type, or FBT category, you can see the employees who have received this benefit in the FBT year. You also see information on the budgeted and the actual gross taxable value of the benefits. These values are shown for each employee and as a total for each component.

You can combine the information provided in the FBT Reconciliation report with information from your other administrative systems to accurately complete your FBT return for the Australian Taxation Office.

Note. The FBT Reconciliation Report includes values calculated during the Package Expense Calculation. To ensure that you get accurate totals included in the FBT Reconciliation report, execute the Package Expense Calculation at the end of the FBT Year for which to run the FBT Reconciliation report. You must complete this before running the report.

Report Request Parameters

FBT Year — The Fringe Benefits Tax Year for which you are running the report.

Source Records

PKG_BSE_CMP_TBL, PKG_EXP_PER_TBL, JOB, PERSONAL_VW

See Also

PeopleSoft Human Resources PeopleBook: Administer Salary Packaging, "(AUS) Modeling Salary Packages

PKG007 - Salary Packaging Package Details

Report Request Parameters

EmplID — Select a packaged employee from the list. You can generate the report to view a specific employee's salary package details.

Source Records

JOB, PERSONAL_DATA, PKG_CALENDAR, PAY_CALENDAR, PKG_EXP_PER_TBL

Manage Variable Compensation Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphanumerically by report ID.

Common Elements Used in Manage Variable Compensation Reports Pages

The following fields are common to most reports using the run control for variable compensation reporting page. Additional parameters for individual reports are defined under each report's heading.

VC Plan ID (variable compensation plan ID) — Select the ID of the variable compensation plan for which you want to generate a report.

Payout Period ID — Select the payout period ID for which you want to generate a report.

Report Type — Indicate the level of detail that you want in the report:

Summary: The report provides data at the level of the group.

Detail: The report provides data at the level of the employee.

VC001 – Actual Award Report

This report is similar to the Calculate Awards report, but it shows any modifications you made to the award on the Award Allocation page.

Select a detailed report or a summary report:

- The detailed report lists all employees in a plan by group, the employee's target award value, annual rate, job code, actual award, and value. It also indicates whether the award is either the minimum or maximum payout under the plan, the total award value for each group, and the grand total for the plan.
- The summary report lists the total award value for each group and the grand total for the plan.

Source Records

PS_VC_PLAN_MEM, PS_VC_AWARD

VC002 - Budget Report

The Budget report calculates the target payout under the plan assuming 100 percent proration. If you use weighted goals in the plan, specify hypothetical attainment percentages on the run

control page. If you use a goals matrix, specify a hypothetical matrix score on the run control page. If you do not specify hypothetical goal attainments or a score, the system assumes 100 percent goal attainment.

Hypothetical Attainments

The following fields are available on the page if the plan uses goals:

Org Percent Attained (organization percent attained)	(Weighted goals) Enter the organization goal attainment percent that you want the system to use in calculating the budget amount.
Group Percent Attained	(Weighted goals) Enter the group goal attainment percent that you want the system to use in calculating the budget amount.
Ind Goal Weight (individual percent attained)	(Weighted goals) Enter the individual goal attainment percent that you want the system to use in calculating the budget amount.
Score	(Matrix goals) Enter the goal matrix score that you want the system to use in calculating the budget amount.

Select a detailed report or a summary report:

- The detailed report lists all employees in a plan by group, the employee's projected target award value, carryover balance, minimum award, and maximum award, as well as the sum of these values for each group and the grand total for the plan.
- The summary report lists the total values for each group and the grand total for the plan.

Source Records

VC_PLAN_MEM, VC_PLAN_PAYOUT

VC003 – Calculate Awards Report

Select a detailed report or a summary report:

- The detailed report lists all employees in a plan by group, the employee's target award value, annual rate, job code, calculated award, award value, and carryover balance. It also indicates whether the award is either the minimum or maximum payout under the plan. In addition, this report shows the total award value for each group and the grand total for the plan.
- The summary report lists the totals of calculated award, calculated award value, and carryover balance for each group and the grand total for the plan.

Source Records

VC_PLAN_MEM, VC_AWARD

VC004 – Carryover Report

Select a detailed report or a summary report:

- The detailed report lists all employees in a plan by group and their carryover balances.
- The summary report lists the total carryover balance for each group, as well as the totals for the plan.

Source Records

VC_PLAN_MEM, VC_AWARD

VC005 – Employee History

For each employee, the report lists target values, award values, and units by plan and payout period. It also prints the total values and units for each plan. In addition, select to print each employee's grand total values for all plans.

Source Records

VC_AWARD, PERSONAL_DATA, VC_PAYPRD_TBL

VC006 – Funding Allocation

After you allocate funds to groups, use the optional Funding Allocations report to review and evaluate the distribution of funds to all of the groups in the plan. The report lists all data as summary information at the group level.

For each group, the report lists the projected target value, actual funding, variance between the target and the funding, and any unallocated balances left from previous periods. The report also provides a grand total of all of these calculations for the entire plan.

If the plan uses weighted goals, the report lists the performance factor for each group. If the plan uses matrix goals, the report lists the payout formula for each group.

Source Records

VC_GRP_ALLOC

VC007 – Guarantee

Select a detailed report or a summary report:

- The detailed report lists all employees in a plan by group and their guarantees.
- The summary report lists the total guarantees for each group, as well as the totals for the plan.

Source Records

VC_AWARD, PERSONAL_DATA, GB_GROUP_TBL, VC_EE_VCOMP_DTL

VC008 – Non Monetary

The report lists only awards that are beyond the status of Initial Calculation. Select a detailed report or a summary report:

- The detailed report lists all employees in a plan by group, their target values, their calculated awards, their actual award in non-monetary units, and their actual awards as a monetary value.
- The summary report lists the total non-monetary units for each group, as well as the totals for the plan.

Source Records

PS_VC_AWARD, PS_PERSONAL_DATA, PS_GB_GROUP_TBL, PS_EMPLOYMENT

VC009 – Plan History

For the plan ID that you select, the report provides information about the plan definition and lists award values, proration, and approver information by payout period.

Source Records

PS_VC_PLAN_TBL, PS_VC_PLAN_EFFDT, PS_VC_PAYPRD_TBL, PS_VC_AWARD

VC010 – Variance

Select a detailed report or a summary report:

- The detailed report lists all employees in a plan by group, the employee's target award value, actual award value, and variance between the target and actual award. It also indicates whether the award is either the minimum or maximum payout under the plan. In addition, this report shows the total target award value, actual award value, and variance for each group and the grand total for the plan.

- The summary report lists the total target award value, actual award value, and variance for each group, as well as the grand totals for the plan.

Source Records

PS_VC_PLAN_MEM, PS_VC_AWARD, PS_PERSONAL_DATA, PS_GB_GROUP_TBL

VC011 – Organization and Group Goals

The Organization and Group Goals report is an optional report that you can run before or after the goal measurement period. This report provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.

This report provides the following information:

- The Plan Goal Weights for the variable compensation plan ID and period ID.
- A list of all organization weighted goals in the plan with their weighting percent and attainment percent.
- A list of all group weighted goals in the plan by group with their weighting percent and attainment percent.

If the group does not have goals, the report indicates that the child group's goals are the parent group's goals.

Source Records

PS_VC_PLAN_TBL, PS_VC_PLAN_EFFDT, PS_VC_ORG_GOAL, PS_VC_GRP_GOAL

VC012 – Consistency

For prorated plans, the Consistency report provides a list of employees who have fallen off a tree and the groups to which they belonged. The variable compensation administrator or the employees' managers can use this information to ensure that these individuals get the appropriate awards.

Source Records

VC_MEM_DATA, PS_PERSONAL_DATA, PS_GB_GROUP_TBL

VC013 – Subscription Error

This report identifies each individual who had either an erred or rejected award under the variable compensation (VC) plan ID and payout period ID. For each erred or rejected award,

the report identifies the employee, award value, award status, and rejection reason (payroll only).

The following are the valid payroll rejection reason codes:

- Invalid Earning Code (Invalid EC)
- Invalid Employee ID & Record # (Invalid EE)
- Invalid Currency Code (Invalid CC)
- Transaction already exists (Tran exist)
- Amount Exceeds Payroll Maximum (Exceed Max)
- Reject All -Requested by VC (Reject All)

Source Records

PS_VC_PLAN_TBL, PS_VC_AWARD, PS_PERSONAL_DATA

VCP001 – Tree Member Overlap

The Tree Member Overlap report identifies employees who exist multiple times on a tree. Use the information to validate or correct the group membership, as appropriate.

Language	Select the language in which you want the system to print the report.
Tree Name	Select the name of the tree for which you want to identify overlapping group memberships.
As of Date	Enter the date as of which you want to identify overlapping group memberships.

Source Records

PSTREEDEFN, PSTREENODE, VC_PLAN_MEM

Manage French Public Sector Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

FP_PROM - Promotable Employees

Source Records

FPAEEPROM_TBL

FPA_CARB - Career Simulation

Source Records

FPAEECAREERBIS

FPA_RAT and FPARAT2 - List of Employees to be Rated

Rating Attendance Enter the minimum number of days of attendance required for the employee to be rated.

Source Records

FPA_RATPRS_TBL

FPA-AFFE - Assignment – Request tbc

Source Records

FPAEEPOST_TBL, FPAEEREQUEST

FPA-CARR - Career-Request tbc

Source Records

FPAEECAREER, FPAEEREQUEST

FPA-POSI - CS Position tbc

Source Records

FPAEELEGALSTAT, FPAEEREQUEST

FPA-REMU - Compensation – Request tbc

Source Records

FPAEESALARY, FPAEEREQUEST

FPA-TDTR - Work Time – Request tbc

Source Records

FPAEEWORKRT, FPAEEREQUEST

FPA025 - Rating

Source Records

EMPLOYEE_REVIEW

FPA030 - Adjustment Constant

Adjustment Constant Rounding Select the round the constant

Source Records

FPMPEREQUAT_TMP

FPA110 - Edit Individual Orders

Source Records

FPAEENOTICE

FPA110 - Edit Collective Orders

Source Records

FPAEENOTICE

FPA115 - Collective Order Number Updating

Source Records

FPAEENOTICE

FPA400 - Part-Time Schedule

Source Records

FPAEEWORKRT

FPA405 - Current PPd Schedule

Source Records

FPAEECAREER

FPACNTR and FPACNTR2 - Contribution Call Letters

Source Records

FPACNTRBRES_TBL

FPAEE_CA - Employee Career/Action

Source Records

FPAEECAREER

FPAEE_PO - CSPosition/Employee

Source Records

FPAEELEGALSTAT

FPAHISTA - Assignment –Request Rejected

Source Records

FPAEEPOST_HIST

FPAHISTC - Career – Request Rejected

Source Records

FPAEECAREER

FPAHISTP - CSPosition – Request Rejected

Source Records

FPAEELEGALSTAT

FPAHISTS - Compensation – Request Rejected

Source Records

FPAEESALAR_HIST

FPAHISTW - Work Time – Request Rejected

Source Records

FPAEEWORK_HIST

FPMACT1 - Action List – Report 1

Source Records

FPMACTION_TBL

FPMACT2 - Action List – Report 2

Source Records

FPMACTION_TBL

FPMACTLE - Actions/CS Positions

Source Records

FPMACTLEGAL_TBL

FPMACTPR - Retro Process Action Rules

Source Records

FPMACTPRTY_TBL

FPMACTST - Actions/Status

Source Records

FPMACTSTATU_TBL

FPMBUISN - Occupation

Source Records

FPMBUSINESS_TBL

FPMCORPS - Corps

Source Records

FPMCORPS_TBL

FPMINDEX - Index Value

Source Records

FPMINDEXAMT_TBL

FPMJOBCD - Job Code

Source Records

JOBCODE_TBL

FPMLEGAL - Civil Service Position

Source Records

FPMLEGALSTA_TBL

FPMPOINT - Type of Point

Source Records

FPMPOINTYP_TBL

FPMRANK1 - Grade List – Report 1

Source Records

FPMRANK_TBL

FPMRANK2 - Grade List – Report 2

Source Records

FPMRANK_TBL

FPMSALST - Salary Grade Table/Scale-Steps

Source Records

FPMSALMATRX_TBL, FPMSALSTEP_TBL

HR_FPFIRE_CI - Final Rating

Source Records

EMPLOYEE_REVIEW

Meet Regulatory Requirements Reports: A to Z

This section provides detailed information about individual reports including important fields and source records. The reports are listed alphabetically by report ID.

Common Elements Used in Meet Regulatory Requirements Reports Pages

Company	Set up values in the Company Table.
Establishment ID	Set up values in the Establishment Table.
Start Date and **End Date**	Select a beginning and ending date for the report time period.
Language	The system populates this field from the **Run Control ID** that you selected. To run the report in a different language, select from the available options.

As of Date and **From/Thru Date**	Select to run the report as of a certain date or to run the report for a date range and then enter the date or dates.
Company, Establishment, HQ Unit and Controlled Establishment, and **All Establishments**	Select to run the report for a company, an establishment, or the headquarters of your organization and all the establishments it controls and then enter a value, or select to run the report for all establishments.

APP001 - Adverse Impact

This report includes only those individuals for whom the applicable job actions were recorded during the date range you specify on the Adverse Impact page

Source Records

APP_DIVERSITY, APPLICANT, APPLICANT_DATA, APPL_DATA_EFFDT, DIVERSITY, POSN_APPLIEDFOR, JOB, JOBCODE_TBL, JOB_REQUISITION, PERS_DATA_EFFDT, R_APP001_TMP

(GBR) APP001UK - Adverse Impact

Source Records

PS_ER_REF_JOB_REQ

APP002 - Job Group Movement Analysis

The Job Group Movement Analysis report helps you analyze which gender and ethnic groups are moving in and out of your organization or are offered opportunities to advance. Use this report to track how employees move through career progressions within your company, especially if you are initiating or complying with affirmative action plans.

The Job Group Movement Analysis report reports on individuals based on the same job actions as previously described for the Adverse Impact report—promotions, transfers, and terminations—but also includes applications and offers.

It shows the number of people by ethnic group and gender being affected by specific personnel actions in each job group. The report provides information for specific job groups and then summarizes the data for the entire company.

The Job Group Movement Analysis report includes only individuals for whom the applicable job actions were recorded during the date range you specify on this page. The report also provides a total number of employees which includes all employees as of the **Thru Date,** regardless of the **From Date.**

Source Records

APPLICANT, APPL_DATA_EFFDT, APPLICANT_DATA, APP_DIVERSITY, DIVERSITY, JOB, , JOBCODE_TBL, PERS_DATA_EFFDT, POSITION_DATA, POSN_APPLIEDFOR, R_APP002_TMP, SET_CNTRL_REC

(FRA) DIS001 - Disability

Before running this report, enter the correct codes in the INSEE (National Institute for Statistic and Economic Studies) Table and the correct Disability Rate code in the External Variables Table.

Calendar Year Enter the year that you want the report to cover.

Source Records

PS_ESTAB_TBL, PS_JOBCODE_TBL, PS_JOB, PS_PERSONAL_DATA, PS_INSEE_TBL_FRA, PS_CONTRACT_DATA, PS_DEPT_TBL, PS_DISABILITY_FRA, PS_INSTALLATION, PS_EXT_PARM_FRA

(FRA) ELE001 - Election

Source Records

ELECTION_TBL, ELECT_GROUP, ELECTION_GR_TBL, ESTAB_TBL

(USF) FGHR012A - EEO Groups by PATCOB/POI

As Of Date Select so that the file contains organizational components that are effective for a given date.

Source Records

PERSONAL_DATA, EMPLOYMENT, JOB, JOBCODE_TBL JC, COMPANY_TBL, PS_GVT_POI_TBL

(USF) FGHR012B - EEO Groups by PATCOB/SubAgency

As Of Date Select so that the file contains organizational components that are effective for a given date.

Source Records

PERSONAL_DATA, EMPLOYMENT, JOB, JOBCODE_TBL JC, COMPANY_TBL, PS_GVT_POI_TBL

(USF) FGHR013A VETS-100 by SubAgency

Start Date and **End Date** Enter a start and end date for the report time period.

Source Records

XLATTABLE, COMPANY_TBL, GVT_SUBAGCY_TBL, PERSONAL_DATA, JOBCODE_TBL, JOB

(USF) FGHR013B - VETS-100 by POI

Source Records

XLATTABLE, COMPANY_TBL, GVT_POI_TBL, PERSONAL_DATA, JOBCODE_TBL, JOB

(USF) FGHR014A - EEO Groups by Series/POI

As Of Date Select so that the file contains organizational components that are effective for a given date.

Source Records

PERSONAL_DATA, EMPLOYMENT, JOB, JOBCODE_TBL, COMPANY_TBL, GVT_OCCUPATION, COMPANY_TBL, GVT_POI_TBL

(USF) FGHR014B - EEO Groups by Series/SubAgency

As Of Date Select so that the file contains organizational components that are effective for a given date.

Source Records

PERSONAL_DATA, EMPLOYMENT, JOB, JOBCODE_TBL, COMPANY_TBL, GVT_OCCUPATION, GVT_POI_TBL

(USF) FGHR019B - CPDF Error

Before running this report, run CPDF Edits Processing to execute the COBOL program FGPCPDFF. This program generates a table of the CPDF edit errors found in the CPDF Status and Dynamic Tables.

Source Records

GVT_CPDF_STATUS, GVT_CPDF_ERRTBL, GVT_CPDF_FLDTBL, GVT_CPDF_EDIT, GVT_CPDF

(USF) FGSF113A - SF113-A

As Of Date	Select so that the file contains organizational components that are effective for a given date.
Start Date and **Turnover Thru Date**	Enter a start and end date for the report time period.
Payroll From Date and **Payroll Thru Date**	Enter a start and end date for the pay period that you want the report to cover.

Source Records

JOB, PAY_EARNINGS, EARNINGS_TBL, LOCATION_TBL, POSITION_DATA, EMPLOYEES, COMPANY_TBL

(USF) FGSF113G - SF113-G

Start Date and **Report Period Thru Date**	Enter a start and end date for the report time period.
Fiscal Year From Date and	Enter the fiscal year start and end date.
Fiscal Year Thru Date	
SF-113G Authorized Ceiling	If you enter a value here it is included in the Ceiling column of the report. (Optional)

Source Records

GOVT_SF113FG_DATA, COMPANY_TBL

OHS001 - OSHA-200 Log

Calendar Year	Enter the year for which you want to run this report.

Source Records

PS_ESTAB_TBL, PS_COMPANY_TBL, PS_INJURY_ILL, PS_JOB, PS_INCIDENT_DATA, PS_PERSON, PS_LOCATION_TBL, PS_JOBCODE_TBL, PS_DEPT_TBL

See Also

Reporting Health and Safety Data

PER016 - EEO-1 Employer Information

Source Records

PS_ESTAB_TBL, PS_COMPANY_TBL, PS_PERSONAL_DATA, PS_JOB, PS_JOBCODE_TBL, PS_LOCATION_TBL, PS_R_PER016, PS_R_PER016X

PER017 - EEO-1 Job Analysis

Also output CSV file	Select to print the CSV file along with the EEO-1 Job Analysis report.
Output Column Headers	This is available if you select **Also output CSV file.** Select if you want your CSV file to include column headings.

Source Records

PS_PERSONAL_DATA, PS_JOB, PS_JOBCODE_TBL, PS_LOCATION_TBL, PS_ESTAB_TBL

PER019 - Termination Analysis

The Terminations Analysis report shows the current employee count and number of terminations based on groupings by age, years of service, and gender and ethnic group. It counts employees in each group, counts terminations, and expresses both counts as a percentage of the total population of active employees.

Run the VETS-100 process before running this report.

Source Records

DIVERSITY, EMPLOYMENT, ESTAB_TBL, JOB, PERSON, PERS_DATA_EFFDT

(GBR) PER019UK - Termination Analysis

Source Records

PERSONAL_DATA, PS_EMPLOYMENT, PS_DIVERSITY, PS_JOB

PER022 - EEO-5 Job Analysis

Source Records

PS_PERSONAL_DATA, PS_JOB, PS_JOBCODE_TBL, PS_LOCATION_TBL, PS_ESTAB_TBL

PER024 - Job Group Analysis

The Job Group Analysis report provides an analysis for the makeup of your workforce based on similar skill groups, rather than establishments. You can use this information to examine job groupings in relation to your company structure and to make changes and additions as needed.

This report includes only those individuals for whom the applicable job actions were recorded during the date range that you specify on the Job Group Analysis page.

Source Records

DIVERSITY, EEO_JOB_GRP_TBL, JOB, JOBCODE_TBL, PERS_DATA_EFFDT, PERSON, REG_REGION_TBL

PER024A - Job Group Analysis Summary

The Job Group Analysis Summary report analyzes the makeup of your workforce based on establishment.

This report includes only those individuals for whom the applicable job actions were recorded during the date range you specify on the Job Group Analysis Summary page.

Source Records

DIVERSITY, EEO_JOB_GRP_TBL, JOB, JOBCODE_TBL, PERS_DATA_EFFDT, PERSON, REG_REGION_TBL

PER025 - Work Force Analysis

This report includes only those individuals for whom the applicable job actions were recorded during the date range you specify on the Work Force Analysis page.

Source Records

DEPT_TBL, DIVERSITY, JOB, JOBCODE_TBL, PERS_DATA_EFFDT, PERSON, SAL_GRADE_TBL, SET_CNTRL_REC

(GBR) PER025UK - Work Force Analysis

Source Records

PS_PERSONAL_DATA, PS_EMPLOYMENT, PS_JOB, PS_JOBCODE_TBL, PS_SAL_GRADE_TBL, PS_DIVERSITY, PS_COMPANY_TBL

PER027 - VETS-100 Process

Use the VETS-100 Process to collect and calculate the required data. The process writes the data to a temporary table. You can then report on the temporary table informally, using the VETS-100 Analysis, or prepare the report for submission, using the VETS-100 Submit process.

The VETS–100 Federal Contractor report lists federal job classifications and the number of employees and new hires in the last 12 months who are special disabled veterans or Vietnam era veterans. It provides totals for each job classification of both veterans and non-veterans who hold these jobs. The federal government specifies the format for this report.

The VETS-100 Process populates a temporary table with the required data. Use the VETS-100 Analysis or VETS-100 Submit processes to report on this data.

Source Records

PS_ESTAB_TBL, PS_COMPANY_TBL, PS_PERSONAL_DATA, PS_EMPLOYMENT, PS_JOB, PS_JOBCODE_TBL, PS_LOCATION_TBL

PER027C - VETS-100 Analysis

Use the VETS-100 Analysis report to report on the VETS-100 data created by the VETS-100 process. The data collected by this report is what will be submitted to the government using the VETS-100 Submit process.

Run the VETS-100 Process before running the VETS-100 Analysis.

Run for Current Information	Select to run the report on information for current year.
History Year to Run for	If you do not select **Run for Current Information,** enter the historical year on which you want to report beginning with year 2000. The system hides this field when you select the **Run for Current Information** check box.
HQ Unit and Controlled Estabs (headquarter unit and controlled establishments) and **All Establishments**	Select to run the report for the headquarters of your organization and any organizations that it controls and then enter an establishment or select to run the report for all establishments in your organization.

Source Records

ESTAB_TBL, COMPANY_TBL, PERSONAL_DATA, EMPLOYMENT, JOB, JOBCODE_TBL, LOCATION_TBL, DISABILITY, DIVERSITY

PER027C - VETS-100 Submit

Run the VETS-100 Process before running this report.

Use the VETS-100 Submit report to create the digital file for submission to the government. The submit process creates a report using the data in the temporary table populated by the VETS-100 Process.

The submit process also transfers the data from the temporary table to a historical table as it reports on it. Unreported data remains in the temporary table until it is reported by the VETS-100 Submit process (and transferred to the historical table) or is eventually overwritten by the VETS-100 Process. This enables you to create multiple digital files by running the submit process for different segments of your employee population.

Source Records

PS_V100_TEMP_TBL

See Also

PER027C - VETS-100 Analysis

PER030 - Job Group Roster

The Job Group Roster lists your employees in job groups, in job title order. It includes the ethnic background and the current salary information for each employee.

This report includes only those individuals for whom the applicable job actions were recorded during the date range that you specify on the Job Group Roster page.

Source Records

DIVERSITY, EEO_JOB_GRP_TBL, EMPLOYMENT, JOB, JOBCODE_TBL, NAMES, PERS_DATA_EFFDT, PERSON

(GBR) PER030UK - Job Group Roster

Source Records

PS_PERSONAL_DATA; PS_EMPLOYMENT; PS_JOB; PS_JOBCODE_TBL; PS_DIVERSITY; PS_COMPANY_TBL, PS_FAST_SCRTY_2

PER031 - EEO-4 State and Local Government

Start Date and **Fiscal Year Thru Date**	Enter the start and end date for the report time period.

Source Records

PS_ESTAB_TBL, PS_PERSONAL_DATA, PS_JOB, PS_R_PER031, PS_JOBCODE_TBL, PS_DEPT_TBL

PER036 - Federal PRWORA - New Hire

Source Records

PS_COMPANY_TBL, PS_PERSONAL_DT_FST, PS_LOCATION_TBL, PS_PERSON_ADDRESS

PER036S - State PRWORA - New Hire Report

Single State Reporting for Multi-State Employers	Select if you want to create separate reports for each state where you do business.
State	Select the state that you want the report to cover.

Source Records

PS_COMPANY_TBL, PS_PERSONAL_DT_FST, PS_LOCATION_TBL, PS_PERSON_ADDRESS

(GBR) PER037UK - Joint Staffing

Source Records

PS_PERSONAL_DATA, PS_JOB, PS_DEPT_TBL

PER040 - IPEDS-S

The IPEDS-S (Fall Staff Survey) report is a mandatory report for U.S. higher education institutions that receive funding from a U.S. Federal government program.

The report is divided into separate parts for different types of employee: full-time faculty members, other full-time employees, part-time employees, and new hires.

Establishment	Select from the list of establishments in the Establishment Table.

Calendar Year Enter the year for which you want to run the report.

Source Records

PS_ESTAB_TBL, PS_PERSONAL_DATA, PS_JOB, PS_SET_CNTRL_REC, PS_JOBCODE_TBL, PS_FREQUENCY_TBL, PS_EG_TENURE_DATA, PS_POSITION_DATA, PS_EG_RANK_TBL, PS_FED_TAX_DATA, PS_CITIZENSHIP, PS_CONTRACT

(CAN) PER101CN - Employment Equity

Empl Equity Reporting Year (employee equity reporting year) Enter the year for which you want to run the report.

Source Records

CONTRACT_DATA, CAN_TAX_BALANCE, INSTALLATION, JOB, REG_REGION_TBL, PERSONAL_DATA, EMPLOYMENT, DISABILITY, DIVERSITY, LOCATION, DEPT_TBL

(CAN) PER102CN - Canadian Official Languages Data File

Source Records

PERSONAL_DATA, JOBCODE_TBL, LOCATION_TBL, JOB, EMPLOYMENT, REG_REGION_TBL, CONTRACT_DATA, CAN_NOC_TBL, PERS_OFFLNG_CAN, CAN_NOC_OCC_GROUP

(CAN) PER108CN - Official Languages Summary

Source Records

PERSONAL_DATA, JOBCODE_TBL, LOCATION_TBL, JOB, EMPLOYMENT, REG_REGION_TBL, STATE_NAMES_TBL, CONTRACT_DATA, CAN_NOC_TBL, PERS_OFFLNG_CAN

(AUS) PER712AUS - Australian Standard Classifications of Occupations

Source Records

PS_ASCO_TBL_AUS

(CAN) PER715CN - Pay Equity Table

Source Records

CAN_PAYEQ_TBL

(CAN) PER716CN - National Occupation Codes

Source Records

CAN_NOC_TBL

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada," Reviewing National Occupational Class Codes

(FRA) REG001FR - Monthly Workforce

This report is required for all organizations that employ 50 or more employees. The report includes:

- The number of employees in the establishment at the beginning and at the end of the time period.
- The number of hires, terminations, and transfers for the included establishments.
- Employee information for hires, transfers, and terminations.

Before running this report, define which contract types to include in the report using the Contract Type Group page.

Source Records

PS_JOB, PS_CONTRACT_DATA, PS_ESTAB_TBL, PS_PERSONAL_DATA, PS_EMPLOYMENT

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France," Grouping Contract Types

(FRA) REG002FR - Personal Register

Source Records

PS_JOB, PS_ESTAB_TBL, PS_PERSONAL_DATA

(FRA) REG003FR - Workforce by Nationality

Company Set up values in the Company Table.

Establishment ID Set up values in the Establishment Table.

Source Records

PS_JOB, PS_ESTAB_TBL, PS_PERSONAL_DATA

(FRA) SOC001 - Employee Survey

Before running this report, run the process to calculate the Employee Survey indicators using the Compute Employee Survey – Employee Survey Parameters Page. Check the results of the calculation and update them on the Edit Employee Survey Page.

Source Records

GROUP_SHEET_FRA , INDIC_SHEET_FRA, EDIT_SHEET_FRA

(GBR) UKNI001 - Northern Ireland

Duty to Monitor Applicants Select if your organization is legally required to report to the Fair Employment Commission.

Source Records

LOCATION_TBL, JOB, JOBCODE_TBL, PERSONAL_DATA, DIVERSITY, XLATTABLE

Monitor Absence Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

ABS001 - Absence Listing

Note. Before you run this report, you must first run the Refresh Employees Table process.

Source Records

EMPLOYEES, ABSENCE_HIST, JOB, ABS_TYPE_TBL, SET_CNTRL_REC, HOLIDAY_DATE, ABSW_SCHD_TBL, ABSW_SCHEDULE, ABSW_SCHD_VW

ABS002 - Absence Periods

Source Records

ABSENCE_HIST, JOB, PERSONAL _DATA, ABS_TYPE_TBL

ABS003 - Time Lost Due to Absence

This report provides information about employee absences, including regulatory region, department, employee name, employee ID, employee type, job title, begin date, return date, and total number of working days.

Note. Before you run this report, run the Refresh Employees Table process.

Source Records

EMPLOYEES, ABSENCE_HIST, JOB, ABS_TYPE_TBL, SET_CNTRL_REC, HOLIDAY_DATE, ABSW_SCHD_TBL, ABSW_SCHEDULE, ABSW_SCHD_V

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information," Running Processes to Facilitate Accurate Reporting

(GBR) ABS004UK - Bradford Score

The Bradford Score column of this report is calculated based on the following information:

- Total number of absences (A)
- Total number of days absent (B)
- A squared x B

Note. Before you run this report, run the Refresh Employees Table process.

Regulatory Region Select the UK regulatory region for the report. If you set up regulatory regions for parts of the UK, you can run the report for a region such as Scotland or Wales.

Leave this field blank if you want the report to cover all employees who work for UK companies.

Source Records

EMPLOYEES, ABSENCE_HIST, JOB, ABS_TYPE_TBL

(NLD) ABS005NL/ ABS006NL - Illness Registration Reports 1 and 2

Before you run these reports, first run the Create Statistics process.

Month from Enter the beginning month of the time period you want to report.

Year from Enter the beginning year of the time period you want to report.

Month thru Enter the ending month of the time period you want to report.

Year thru Enter the ending year of the time period you want to report.

Include Hierarchy Select this check box to include departments within the selected department, based on the department security tree.

Longtime Illness Select from the following:

Included: Select if you want longtime illnesses included in the report. An illness is considered to be longtime when the duration of the illness falls within an Illness Length Category of *Long,* as specified under the Absence parameters.

Excluded: Select if you don't want longtime illnesses included in the report.

An illness that becomes longtime within the reporting period is counted as an ended illness, and the available employment days are counted only until the day an illness becomes longtime.

An illness that becomes longtime before the start of the reporting period is ignored, and the employee is also ignored for the calculation of the available employment days.

Partial Illness	Select from the following: *Included:* Select this value if you want partial illnesses included in the report. An illness is considered to be partial while it is commented with an illness percentage less than 100, as specified under the General Absence parameters. *Excluded:* Select this value if you don't want partial illnesses included in the report. An illness that becomes partial within the reporting period after being a longtime illness is counted as an ended illness. An illness that becomes longtime after being partial is counted as a newly started illness.
Maternity Leave	Select to include or exclude maternity leaves in the report.

Source Records

ABS_STAT_NLD, ABS_PARAMETERS, RUN_CNTL_HR_NLD, DEPT_SEC_VW_NLD

See Also

PeopleSoft Human Resources: Monitor Absences, "Tracking General Absences," Pages Used for Dutch Illness Reporting

Monitor Health and Safety Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

Common Elements Used in Monitor Health and Safety Reports Pages

The following are some key terms related to health and safety reporting, which occur throughout this appendix.

Incident Number	The number of the incident.
Just this incident	If you want to report on just one incident, select the incident number in this group box.

(CAN) OHS001CN - Workers Compensation Board Form 7

Source Records

WCB_RPT_DATA, INCIDENT_DATA, INJURY_ILL, EMPLOYMENT, INCIDENT_REPORT, PERSONAL_DATA, JOB_LABOR, HS_EMPLOYMENT, HS_EMPL_REL_CAN, HS_EMPL_SUB_CAN, COMP_PROP_TBL, INCDNT_VEH_EMPL, INJURY_ILL_SOI, INJURY_SRCE_TBL, INJ_ILL_BPI_CAN, INJURY_NATR_TBL, BODY_PART_TBL, INJ_PEOPLE_CAN, INJURY_ROLE_CAN, NE_PERSONAL_DTA, INCIDENT_PEOPLE, LONG_EARNS_CAN, INJ_ILL_WI_CAN, INJ_ILL_WA_CAN, ABSW_SCHD_VW, INJ_ILL_PHC_CAN, INJ_ILL_PDS_CAN, INJ_ILL_OBJSTMT, INJURY_ILL_AID, INJURY_ILL_ADDR, MEDICAL_FAC_TBL, NE_PERS_PHONE, INJ_ILL_NBD_CAN, INJ_ILL_NRD_CAN, INJURY_ILL_DESC,JOB, COMPANY,PERS_NID,LOCATION, JOBCODE_TBL, INCIDENT_CAUSE

(FRA) OHS001FR - Work Accident Report

French employers are required to submit a written report whenever certain accidents, injuries, and illnesses occur. The government requires companies to produce this report within 48 hours and to send it to the Social Security Agency.

By Employee or **By Incident Number** — Select an option to search by **EmplID** or by **Incident Number.**

Source Records

COMPANY_TBL, JOB, ESTAB_TBL, DEPT_TBL, INJURY_ILL, INCIDENT_DATA, INJURY_ILL_BP, BODY_PART_TBL, INJURY_ILL_NOI, INJURY_NATR_TBL, INJURY_ILL_ADDR, INCIDENT_PEOPLE, PERSONAL_DATA, JOBCODE_TBL, EMPLOYMENT, PERS_NID

(GER) OHS001GR – Accident Report

To prepare the accident report, you must first enter an incident into the system using incident details and, if applicable, vehicle and equipment incident details. Before you run this report, run the SQR process GER Collect Accident Data (OHS501GR) to load the temporary data tables. Access the GER Collect Accident Data page on the Proc Lcl menu. Use the GER Accident Report page description to guide you through the page.

Accident Insurance — Select the appropriate **Accident Insurance.**

Working Start Time — Enter the **Working Start Time.**

Working End Time — Enter the **Working End Time.**

Source Records

OHS001GER_TMP1, OHS001GER_TMP2

(GBR) OHS001UK - Injury or Dangerous Occurrence

Before running the United Kingdom Injury or Dangerous Occurrence report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report.

Note. To prepare the injury and dangerous occurrence report, you must first have entered an incident into the system using incident details.

Source Records

OHS_501UK_TMP1, OHS_501UK_TMP2

(GER) OHS002GR - Reportable Accident or Illness

Source Records

ACCDNT_TYPE_TBL, INJURY_ILL_BP, INJURY_ILL, INJURY_ILL_ACC, BODY_PART_TBL BPT, JOB

(GBR) OHS002UK - Illness Report

Before running the UK Illness report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report.

Once the data in the report is complete, sign and mail it to the HSE (Health and Safety Executive).

Source Records

OHS_501UK_TMP1, OHS_501UK_TMP2

OHS003 - Non-Employees In Incidents

Source Records

ZZ_NON_EMP_INC

(GER) OHS003GR - Incident Location Summary

Source Records

INC_TRAVEL_DATA, TRANSPORT_TBL, INCIDENT_PEOPLE, INJURY_ILL_VW, NE_PERSONAL_DTA, PERSONAL_DATA, INC_TRAVRPT_GER, INJURY_ILL

(GER) OHS004GR - Illness Report

To prepare the illness report, you must first enter an illness into the system using the GER Illness Tracking page group. The details of the illness must also be properly entered into the system. Before you run the report, run the SQR process GER Collect Illness Data (OHS504GR) to load the temporary data tables. Access the GER Collect Illness Data page on the Proc Lcl menu. Use the GER Illness Report page description to guide you through the page.

Source Records

OHS004GER_TMP1, OHS004GER_TMP2

(CAN) OHS008CN - Workers Compensation Board Incident

Source Records

INCIDENT_DATA, PERSONAL_DATA, NE_PERSONAL_DTA, INJ_PEOPLE_CAN, INJURY_ILL_AID, INJURY_ILL, EMPLOYMENT

OHS009 - Incident Detail

Source Records

INCIDENT_DATA

OHS010 - Incident Summary

Source Records

HS_INCSUM_VW, PERSONAL_DTA_VW, NE_PERSONAL_DATA

OHS011 - Location Incident Summary

Source Records

HS_INCSUM_VW, PERSONAL_DTA_VW, NE_PERSONAL_DTA

OHS012 - Claim Summary Overview

Source Records

CLM_SUMM_VW, PERSONAL_DTA_VW, NE_PERSONAL_DTA

OHS013 - Employees In Incidents

Source Records

INCIDENT_DATA, INJURY_ILL_VW, PERSONAL_DTA_VW

OHS014 - Incident Lost Work

Source Records

INJURY_ILL_VW, PERSONAL_DATA, PERS_SRCH_GBL

(ESP) OHS014ESP - Incident Without Lost Work

Source Records

PS_INJURY_ILL_VW, PS_PERSONAL_DATA, PS_PERS_NID, PS_INJURY_ILL_ACC, PS_JOB, PS_LOCATION_TBL

OHS015 - Incident Claim Detail

Source Records

R_OHS015_VW, PERS_SRCH_GBL

OHS016 - Vehicle Incident Summary

Source Records

VEH_EQ_INC_VW, PERSONAL_DTA_VW, NE_PERSONAL_DTA

(CHE) PER002CHE - Accident Report

Source Records

COMPANY_TBL, PERS_DATA_EFFDT, PERSONAL_DATA, JOBCODE_TBL, INCIDENT_DATA, COMP_PROP_TBL, BODY_PART_TBL, INJURY_NATR_TBL, DIAGNOSIS_TBL, INJ_REHAB_ACTN, COUNTRY_TBL, COMP_RATECD_TBL, BUS_UNIT_TBL_HR, FREQUENCY_TBL, INJURY_ILL_ADDR

Administer Salaries for the Netherlands Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphanumerically by report ID.

INT001NL - Insurance Board Notification

Dutch employers must report personal data to the insurance board for every new employee. The purpose of the Insurance Board Notification (INT001NL) Structured Query Report (SQR) is to print the insurance board notification. Also, Dutch employees must be insured in accordance with the Dutch National Health Service (DNHS) unless their incomes rise above a certain level. If this occurs, the Insurance Notification (INT002NL) SQR can be used to inform the DNHS.

Run the Ins. Board Notification report, which prints the insurance board notification or creates an electronic file for importing into VPMELD.

Hire	Select this option if you are reporting a newly hired employee.
Change Data Social Insurance	Select this option if you are reporting a change for social insurance.
Change Data Industrial Board	Select this option if you are reporting a change for the industrial board.
Termination	Select this option if you are reporting an employment termination.
Death	Select this option if you are reporting a death.
Correction	Select this check box if you are reporting a correction.

Source Records

STRINGS_TBL; PERSONAL_DATA; PERS_DATA_EFFDT; PERS_NID; NID_TYPE_LANG; EMPLOYMENT; JOB; COMPANY_TBL; COMP_EXT_RELATN; PROVIDR_TBL; SOCIAL_ASSR_NLD and XLATTABLE

INT002NL - Insurance Notification

Dutch employees must be insured in accordance with the Dutch National Health Service (DNHS) unless their income rises above a certain level. If this occurs, use the Insurance Notification (INT002NL) report to inform the DNHS.

Reason for Communication

Use this group box to enter why you are informing the Dutch National Health Service (DNHS).

Start	Select to report a start in DNHS coverage.
End	Select to report an end in DNHS coverage.

Reason for End

Use this group box to enter the reason to end DNHS coverage.

Termination	Select to report an employment termination.
Salary Limit Reached	Select if the employee has reached the salary limit.
Military Service	Select if the employee enters military service.
Death	Select if the employee dies.
Else	Select for an unlisted reason and enter the reason in the provided field.

Reason for Start

Use this group box to enter the reason to start DNHS coverage.

Hire	Select if the employee is a new hire.
Transition	Select if the employee is changing jobs.

Source Records

STRINGS_TBL; PERSONAL_DATA; PERS_DATA_EFFDT; EMPLOYMENT; SOCIAL_ASSR_NLD; JOB; PROVIDR_TBL; COMPANY_TBL; COMP_EXT_RELATN and XLATTABLE

INT003NL – Pay Groups

Use the Pay Group table to establish pay groups within your company. A pay group is a set of employees grouped in the same payroll processing frequency because they share the same earnings and deductions.

Run the Pay Groups report, which reviews the valid pay groups that are entered into the system.

Source Records

STRINGS_TBL; PAYGROUP_TBL; PAYGROUP_LANG; PAYGRP_EMPLTYPE

INT004NL – Earnings

Source Records

Earnings table

INT005NL – Deductions

Run the Deductions report (INT005NL), which reviews the different deductions defined in the system. The Structured Query Report (SQR) is sorted by plan type, deduction code, and effective date. The report prints the classification codes that you set up in the Deduction Table for each plan type.

Source Records

STRINGS_TBL; DEDUCT_TBL_NLD; DEDUCT_NLD_LNG

INT006NL – General Deduction/Frequency

Run the General Deduction/Frequency report (INT006NL), which provides information about valid general deduction codes that you entered into the system. The report shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the employee pay frequency, and any additional flat deduction amounts.

Source Records

GEN_DED_TBL_NLD; GEN_DED_FRQ_NLD

Plan Careers and Successions Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

CARPLAN - Employee Career Plan

The Employee Career Plan report summarizes an employee's potential career path.

Source Records

CAREER_RPT, PERS_SRCH_GBL

See Also

PeopleSoft Human Resources PeopleBook: Plan Careers and Successions, "Planning Careers," Creating Career Plans

CARTRAIN - Employee Career Training Plan

The Employee Career Training Plan report lists the training courses planned for an employee and expected completion dates. This information is set up in employees' career plans.

Source Records

CAREER_TRAINING, PERSONAL_DATA, PERS_SRCH_GBL

See Also

PeopleSoft Human Resources PeopleBook: Plan Careers and Successions, "Planning Careers," Entering and Updating Training Programs

(USF) FGHR022 - US Federal Individual Development Plan

An IDP includes an employee profile, employee competencies, employee training history, potential job moves, mentoring, training, other specific developmental areas, summary of estimated costs, summary of actual costs, and a section for signatures.

Source Records

PERSONAL_DATA, JOB, EMPLOYMENT, CAREERPLAN, GVT_CAR_DEV_ELG, GEOG_PREF_US, OBSTACLES_MOBIL, SHRT_TERM_GOALS, LONG_TERM_GOALS, EMPLOYEE_REVIEW, REVW_RATING_TBL

PER034 - Internal Resume

Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards

Source Records

PERSONAL_DATA, COMP_SUMM_VW, CAREER_SUMM_VW, PRIORWORK_EXPER, CM_EVALUATIONS, COMPETENCIES, COMPETENCY_TBL, ACCOMPLISHMENTS, ACCOMP_TBL, STATE_NAMES_TBL, SPECL_PROJECT, CITIZENSHIP, TRAINING, VISA_PMT_DATA, PERS_NID, EMPLOYEE_REVIEW, VISA_PERMIT_TBL, REVW_RATING_TBL, ACTN_REASON_TBL, COUNTRY_TBL

Plan Salaries Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

CMP001 - Salary Structure

For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.

Source Records

SAL_GRADE_TBL, SAL_PLAN_TBL

CMP002 - Job Grading by Evaluation Points

The Job Grading by Evaluation Points report includes all titles within that grade ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in your organization and consequently a compensation value to each salary grade. The report includes salary survey information and associated point ratios and midpoints.

Source Records

JOBCODE_TBL, SAL_GRADE_TBL, SAL_PLAN_TBL

CMP003 - Compa-Ratio Analysis

The report lists each employee in the salary grade and the midpoint amount of the salaries in that grade. For each employee, the report lists job code, title, name, and department ID. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*

The last two columns pertain to a compa-ratio calculation for each employee. This means a comparison of the employee's salary to the midpoint amount of the salary grade. If the

employee's current rate is the same as the midpoint, the compa-ratio is 1.00 or one hundred percent of the midpoint.

Source Records

EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA

CMP004 - Below Minimum Analysis

The Below Minimum Analysis report lists the salary grades containing employees under the minimum, the associated minimum amount, the employee's annual rate, and the amount below both in dollars and as a percentage. The report displays those employees whose Employee Status is *Active, Leave of Absence, Suspended,* or *Leave with Pay.*

Source Records

EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA

CMP005 - Above Maximum Analysis

For each employee, the report shows the job code and title, name, department ID, the maximum amount, the employee's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those employees whose Employee Status *is Active, Leave of Absence, Suspended,* or *Leave with Pay.*

Source Records

EMPLOYMENT, JOB, JOBCODE_TBL, PERSONAL_DATA.

CMP008 - Salary Change Mass Update by Salary Plan and Pay Group

Generate this report after running the Update by Salary Plan and Pay Group application engine process. The report displays the employees' previous and new compensation package. Run the database agent to load all of the data to the Job Data records.

Run this report as the second step in the three-step procedure to run the Update by Sal (salary) Plan and Paygroup process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Sal Plan and Paygroup process run control page.

Source Records

PERSONAL_DATA, CMP008_TMP

See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Processing Mass Salary Increases," Updating Salaries by Salary Plan and Pay Group Process

CMP010 - Salary Mass Update by Job Code

Generate this report after running the Update by Job Code application engine process. The report displays the employees' previous and new salary administration plan, grade, and step. Run the PeopleSoft Database Agent to load all of the data to the Job Data records.

Run this report as the second step in the three-step procedure you follow to run the Update by Job Code process. All three steps are available in the Peoplesoft Process Scheduler when you use the Update by Job Code process run control page.

Source Records

PERSONAL_DATA, CMP010_TMP

See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Processing Mass Salary Increases," Updating Salaries by Job Code Process

CMP011 - Salary History by Employee

The Salary History by Employee report provides information about each salary change for an employee during a specified time period.

Source Records

COMPSUMMRPT_VW

CMP014 - Salary History by Group

The Salary History by Group report provides information about the salary changes for the employees in a group during a specified time period.

Source Records

COMPSUMMRPT_VW, SAL_PLN_GRP_RES_TBL

(JPN) CMP020JP - Salary Simulation

After you have run the Salary Increase Simulation process and made any adjustments to the results, you can have the system generate a report of the final results.

Salary Increase ID Enter the salary increase ID you ran the simulation for and for which you want the results reported.

Calculation Number Enter the calculation number of the particular simulation you want reported.

Select All Groups Select this check box if you want the system to populate the Group ID section with all the groups you originally associated with this **Salary Increase ID.**

Source Records

SALINC_SIML_JPN, SAL_ID_TBL_JPN, JOBCODE_TBL, COMP_RATECD_TBL, GB_GROUP_TBL

See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, "(JPN) Updating Salaries for Japan," Updating Salaries by Percentages for Japan

LMS001 and LMS002 - Forecasted Compensation

Source Records

PS_LMS_SC_RESULT and PS_LMS_EFF_RES

LMS003 - Scenario Comparison

Scenario Filter This group box enables you to narrow the choice of scenarios to report by User ID and Run Control ID.

 Click to display scenarios that meet the scenario filter requirements.

Scenario History Report This group box displays all scenarios that meet the scenario filter requirements. Scenarios are listed by Scenario ID, Scenario Run DateTime, User ID, Run Control ID, and Description.

To run one scenario at a time, select this check box.

Source Records

PS_LMS_SC_RESULT and PS_LMS_EFF_RES

LMS004 - Rate Codes Without Rate Code Class

The Salary Forecasting calculation functions properly only when the rate codes assigned to individuals have an associated class. Check that all components of pay included in the compensation package of an employee have an associated rate code class. Run this report before you run the calculation process.

Source Records

PS_COMP_RATECD_TBL % PS_RATECD_CLS_TBL

PER008 - Employee Review Audit

The report provides the following information for each employee in the group who has a completed review:

- The reviewer's name and weighting factor.
- The employee's rating scale and review rating.
- The average of the employee's review ratings over time.
- The employee's next review date.

You can use this report as a reminder to schedule interviews.

Source Records

EMPLOYEES, EMPLOYEE_REVIEW, REVIEW_REVIEWER

PER012 - Departmental Salaries

This report provides an alphabetical list of employees by department, basic job data information, and a breakdown of pay rates for each. Job data includes the following: date hired, employee type (salaried, hourly, or exempt), full or part-time, regular or temporary, job code, job title, and supervisor name.

Pay rate information includes pay group, salary grade, and pay rates broken down by hourly, daily, monthly, and annual amounts.

Department level totals include all employees, employee type, full or part-time employees, and regular or temporary employees. You'll also find a grand total for all departments.

Source Records

EMPLOYEES, JOB, PERSONAL_DATA

PER013 - Employee Compensation Changes

The report lists the following information for each employee rate change: name, employee ID, date hired, employee type (salaried, hourly, exempt), job code, title, salary grade, and compensation rate.

The last four columns show the date of each compensation rate change, the amount and percentage of the change, and the job action that prompted it.

This reports provides information about employees who have had compensation rate changes within a selected time period.

The report sorts by: Department ID, Employee Name, Employee ID, Effective Date, Job Action

Source Records

PERSONAL_DATA, EMPLOYMENT, JOBCODE_TBL, JOB, COMPENSATION

PER023 - Salary History for Company

For each salary change, the report lists the associated job action, effective date, the job code and title, salary grade, compensation rate, the monetary amount, and the percentage of the change. For each employee included, you'll find the employee ID, employee type, regular or temporary, and full-time or part-time.

Source Records

EMPLOYMENT, JOB, PERSONAL_DATA

PER026 - EE Review Result Distribution

For each employee the report lists ID, name, review date, review type, and review outcome. The report displays the desired and actual review result distribution and distribution variance. If the distribution group is associated with a budget ID, the report shows the desired and actual budget and budget variance.

Source Records

REVIEW_DISTRIB, REVW_SCALE_TBL, MERIT_GROUP_TBL, SAL_PLAN_GRP_RES, EMPLOYEE_REVIEW

PER041 - Employee With Merit

The Employee With Merit report lists all employees who have received a merit increase during the period entered on the parameter page.

Criteria for Selecting Employees With a Merit Increase

An employee is listed on this report if the following conditions are met during the time period specified:

- The employee's summation-type employee review on the Employee Review pages has Approved status.

- The review result has been loaded to the job record using the Review Result to Job Data process.

  This process inserts a new row into Job, updating the employee's compensation package. The effective date is the employee review effective date. The rate code inserted is the rate code associated with the rating scale in the Review Rating Scale Table.

- If the rating scale in the Job Data record and the rate code in the Compensation record are the same as those defined in the Rating Scale Table, the employee is listed on the report.

Calculating Percents and Averages

The report displays compensation rates and percents at the level of the employee, the average compensation rates and percents for the company location, and the average compensation rates and percents locations in the company.

%	For each employee, the report displays a percent by calculating the employee's compensation rate divided by compensation rate of all employees during the period.
Average Comp Rate (average compensation rate)	For each company location, the report displays the average compensation rate by calculating the sum of all compensation rates divided by the number of employees in the company location.
Average %	For each company location, the report displays the average percent by calculating the sum of the employee % and dividing by the number of employees in the company location.
Total Average Comp Rate (total average compensation rate)	At the end, the report displays the total average compensation rate of all companies by calculating the Average Comp Rate of all company locations divided by the number of employees in all company locations.
Total Average Percent	At the end, the report displays the total average percent of all companies by calculating the sum of the Average % of all company locations divided by the number of employees in all company locations.

Source Records

JOB, PERSONAL_DATA, COMPENSATION, REVW_SCALE_TBL

PER042 - Employee Without Merit

The Employee Without Merit report lists the employees who do not meet the criteria of the Employee With Merit report for the specified time period.

Source Records

JOB, PERSONAL_DATA, COMPENSATION, REVW_SCALE_TBL

(JPN) PER062JP - Grade Advance Candidate List

The Grade Advance Candidate List Report is the output from the RUNCTL_PER062_JPN process. It lists all employees who have become candidates for a grade advance because they have met the appropriate criteria. The criteria for eligibility for advancement is defined at grade level. The criteria include the results of employee reviews.

SetID	Enter the Set ID. This is necessary because Salary Plans can be used in multiple Sets.
Sal Plan (salary plan)	Enter the salary plan of the grade you want the candidate list for.
Grade	Enter the grade you want the eligibility report on.
As Of Date	Enter the as of date you want the report to be based on. Eligibility depends on such things as age and years in a grade, and the system uses the As Of Date as the date to count up to.
Nbr of Reviews (number of reviews)	Displays the number of reviews you have specified for inclusion in the eligibility points count. This information comes from the Grade Advance Criteria page.
Required Yrs in Current Grade (required years in current grade)	Displays the number of years employees must be in this grade before they become eligible to advance from this grade. This information comes from the Grade Advance Criteria page.
Min Age (minimum age)	Displays the minimum age employees must have reached before they can advance from this grade. This information comes from the Grade Advance Criteria page. The system uses the employee's Education Level Age when determining this minimum age.
Reqd Elig Pts (required eligibility points)	Even though you have already defined the required eligibility points for a grade advance in the Grade Advance Criteria page, you have the flexibility to adjust this points criteria for actual reporting. For example, you may want to see how many more or how many fewer employees become eligible to advance from this grade if you reduce or increase the required points respectively.
---------- or ----------	
Max Yrs in Current Grade (maximum years in current grade)	Displays the maximum years in the current grade that you set on the Grade Advance Criteria page. The system automatically lists as eligible all employees who have reached the maximum years for the grade, irrespective of all other criteria.

Applicable Reviews

Review ID	Displays the review IDs and descriptions of all the reviews that will be included in the eligibility points count. There will be as many as you specified in the Number of Reviews field on the Grade Advance Criteria page. The system selects the reviews based upon their IDs, which are also their effective dates. For two reviews, it selects the most recent effective date/review ID and the next most recent effective date/review ID.
Review Type	Displays the Review Type from the Review Definition page.
Review Weight	Displays the Review Weight you entered on the Grade Advance Criteria page. If you are using the non-weighted—simple average—method and didn't add any review sequences or weightings, these fields will be blank. The system just totals the review points and divides by the number of reviews from which those points came.

Source Records

SAL_PLAN_TBL, SAL_GRADE_TBL, EMPLOYEE_REVIEW, PERSONAL_DATA, DEPT_TBL, SUPVLVL_TBL, EMPLOYMENT, JOB, EMPLOYEE, REVIEW

PER706A - Salary Grade Table

Source Records

SAL_GRADE_TBL

PER706B - Salary Grade and Step Tables

This report provides salary grade and step information from the Salary Grade and Step Table.

Source Records

SAL_GRADE_TBL, SAL_RATECD_TBL

Recruit Workforce Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

APP002 - Job Group Movement Analysis

This report provides an analysis of the number of males and females by ethnic group who were applicants, hires, promotions, or terminations during the specified period.

It shows which sex and ethnic groups are moving in and out of the organization and being offered opportunities to advance.

Source Records

PS_R_APP002_TMP, PS_APPLICANT, PS_APPLICANT_DATA, PS_POSN_APPLIEDFOR, PS_JOBCODE_TBL, PS_APP_DIVERSITY, PS_APPL_DATA_EFFDT, PS_SET_CNTRL_REC, PS_JOB_REQUISITION, PS_POSITION_DATA, PS_PERS_DATA_EFFDT, PS_JOB, PS_DIVERSITY

APP003 - Requisition Status

Use this report to track the status of the job requisitions within your company to monitor the positions available for your recruiting activities.

Source Records

PS_JOB_REQUISITION, PS_JOB_REQUIS_TYP, PS_POSN_APPLIEDFOR, PS_ER_STS_REQ_VW, PS_INSTALLATION, PS_ER_JOB_REQ_EXP, PS_SET_CNTRL_GROUP

APP004 - Requisition Posting

Use the merged documents to create standardized job posting announcements.

Report Request Parameters

Use this group box to specify the job requisitions for which you want to generate job postings.

Job Req # (job requisition number) — Select a job requisition number from the list of open requisitions in Job Requisition Data. When you navigate out of this field, the system displays the **Description** and **Department.**

Running the Report

The system uses an SQR to extract data from PeopleSoft Human Resources, and a Word for Windows macro to merge the data into a form letter template.

Run — Click to run this request. From the Process Scheduler Request page, select the check box for the process that you want to run and update the Type and Format fields for the SQR Report process.

Select the Job Requisition Posting process (process type PSJob) if you want the process scheduler to automatically run the SQR to extract data, followed by the Word macro to merge the data.

If you prefer to run each process manually, select the SQR Report process first. After that runs, run the WinWord process to merge the data.

For the SQR Report process, select File in the Type field and LP in the Format field.

No matter what Output Destination you specify on the Process Scheduler, the system always sends the data extract files and the form letter to a temporary directory. Use Word for Windows to print the letters.

Note. If you receive an error such as "WinExec failed," the PATH statement for the macro might be incorrect.

Source Records

PS_JOB_REQUISITION, PS_JOBCODE_TBL, PS_SAL_GRADE_TBL, PS_SAL_PLAN_TBL, PS_JOB_REQUIS_TYP, PS_SET_CNTRL_REC, PS_JOBCODE_TBL, PS_JOB_REQ_DESCRS

APP005 - Candidate Listing

This report displays the following information for each requisition:

- Requisition Number.
- Job Code.
- Position Number.
- Status.
- Whether the requisition is new or a replacement.
- Position title and recruiter.
- Date the requisition was approved.

For each candidate interviewed, the report displays the following: employee ID, name, status in the interview process (active, inactive, hired, withdrawn), last interview step completed, and any offers made.

Source Records

PS_JOB_REQUISITION, PS_ER_STS_REQ_VW, PS_FAST_SQR_SEC_VW, PS_POSN_APPLIEDFOR, PS_APPLICANT, PS_APPL_DATA_EFFDT, PS_ER_STS_APP_VW, PS_APPLICATN_ROUTE, PS_ER_INTERVIEW, PS_OFFER_MAX_VW, PS_OFFER_DTL, PS_INSTALLATION

APP006 - Requisition Cost Analysis

This report supplies basic identification information and a breakdown of expense types and amounts for recruitment activities. For each job requisition, the report lists the requisition number, job code, position number, status, title of the position offered, and the recruiter's name.

The last two columns contain a breakdown of each type of expense incurred and its monetary amount, including a total by requisition number. A department summary includes an expense total for all requisitions, each expense category, and calculates a department-average cost-per-hire amount.

Source Records

PS_JOB_REQUISITION, PS_ER_STS_REQ_VW, PS_ER_JOB_REQ_EXP, PS_INSTALLATION

APP007 - Recruitment Letters

This report extracts data from the database and creates several data extract files. You use these files to perform a mail merge using Microsoft Word for Windows.

Running the Report

The system uses an SQR to extract data from PeopleSoft Human Resources, and a Word for Windows macro to merge the data into a form letter template.

Run Click to run this request. From the Process Scheduler Request page, select the check box for the process that you want to run and update the Type and Format fields for the SQR Report process.

Select the Recruitment Letters process (process type PSJob) if you want the process scheduler to automatically run the SQR to extract data, followed by the Word macro to merge the data.

If you prefer to run each process manually, select the SQR Report process first. After that runs, run the WinWord process to merge the data.

For the SQR Report process, select ***File*** in the Type field and ***LP*** in the Format field.

No matter what Output Destination you specify on the Process Scheduler, the system always sends the data extract files and the form letter to a temporary directory. Use Word for Windows to print the letters.

Note. If you receive an error such as "WinExec failed," the PATH statement for the macro may be incorrect.

Source Records

PS_R_APP007, PS_APPLICATN_DATA, PS_ER_INTERVIEW, PS_OFFER, PS_POSN_APPLIEDFOR, PS_APPLICANT_VW

APP011 - Applicant Summary by Requisition

Source Record

PS_ER_REF_JOB_REQ

APP012 - Applicant Summary by Source

Source Records

PS_ER_REFERRAL

(GER) APP012GR - German Job Postings

Source Records

PS_JOB_REQUISITION, PS_JOB_REQ_EDUC_EXP, PS_JOB_RQMT_TBL, PS_COMPANY_TBL, PS_LOCATION_TBL, PS_DEPT_TBL, PS_JOB_RQMT_COMP, PS_COMPETENCY_TBL, PS_JOB_RQMT_ACCOMP, PS_ACCOMP_TBL, PS_JOB_REQ_DESCRS, XLATTABLE, PS_SET_CNTRL_REC, PS_SET_CNTRL_GROUP, PS_ER_STATUS_TBL

(GER) APP013GR - German Works Council Posting

Source Records

PS_JOB_REQUISITION, PS_JOB_REQ_EDUC_EX, PS_JOB_RQMT_TBL, PS_COMPANY_TBL, PS_LOCATION_TBL, PS_DEPT_TBL, PS_JOB_RQMT_COMP, PS_COMPETENCY_TBL, PS_JOB_RQMT_ACCOMP, PS_ACCOMP_TBL,

PS_JOB_REQ_DESCRS, XLATTABLE, PS_SET_CNTRL_REC, PS_SET_CNTRL_GROUP, PS_ER_STATUS_TBL

(USF) FGREC820 - Evaluation of Candidates

Source Records

GVT_CAND_LST_VW, GVT_APPL_CONSID, APPLICANT_DATA, JOBCODE_TBL, JOB_REQUISITION, GVT_VETPREF_TBL, APP_NID, APPLICANT_VW

(USF) FGREC821 - Certificate of Eligibles

Source Records

GVT_CERT_PRT_VW, GVT_APPL_CONSID, APPLICANT_DATA, JOBCODE_TBL, JOB_REQUISITION, APP_NID, GVT_RQSN_OPNGS, APPLICANT, APPL_DATA_EFFDT

Report Total Compensation Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

TC001 - Total Compensation Statement

This report is often referred to as the Benefits Statement report.

Amount Type	Select one: ***Compensation Amount, Payroll Amount, (None).***
Sort By	Sort the report **By Department, By Location, or By Last Name.**
Group ID	Select the groups within the specified plan ID for which you want to run this report.

Source Records

TC_EE_DETAIL, TC_COMP_DEFN, PERSONAL_DATA, TC_COMP_SOURCE

TC002 - Group Summary Compensation

Each compensation ID that you define reports a value. If, for example, you specify a group of five employees and define three compensation IDs, the Group Compensation report gives three values, one for each compensation ID. The values are summed for the group.

Amount Type Select one: ***Compensation Amount, Payroll Amount,*** and ***(None).*** These values refer to the data sources.

Group ID Select the groups within the specified plan ID for which you want to run this report.

Source Records

TC_EE_DETAIL

TC003 - Employee Compensation

Each compensation ID that you specify returns a value. If you have a group of 15 employees and have specified four compensation IDs, this report returns four values for each of the 15 employees. To check the results of the report before printing it, use the Employee Total Compensation Inquiry page.

Note. Ad hoc awards entered directly in the TC warehouse, are reported on a separate page for each employee.

Amount Type Select one: ***Compensation Amount, Payroll Amount,*** and ***(None).*** These values refer to the data sources.

Group ID You can run this report on a subset of the groups specified for this plan ID. Select the groups within the specified plan ID for which you want to run this report.

Source Records

TC_EE_DETAIL

Track Flexible Service Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

PER048 - Employee Service Listing

Business Unit (Blank for all) Select the business unit for which you are requesting the report, or leave this field blank to include all business units.

Service Calc. Group (Blank for All) [service calculation group (blank for all)]	Select the service calculation group for which you are requesting a report, or leave this field blank to include all service calculation groups in the report.
Type of Service (Blank for All)	Select the service type for which you are requesting a report, or leave this field blank to include all service types in the report.
Service amount between and **and**	Enter the range of years of service that you want the report to include.
Sort in: and **order of Service**	Specify whether you want the report to list by ascending or descending order of service.

Source Records

Flexible Service Accrual Data, JOB_DATA, PERSONAL_DATA, EG_FLX_SVC_DT, JOB_DATA

PER049 - Service Calculation

Calculation Name (Blank for all)	Enter the calculation name (or the run control ID) of the batch process that you want to run the report for. If you enter a calculation name, enter only the date range that you want to run the report for. The other input fields will be unavailable.
Business Unit (Blank for all)	Select the business unit for which you are requesting the report, or leave this field blank to include all business units.
EmplID (Blank for All) [employee ID (blank for all)]	Enter an employee ID if you want the report to include a single employee only. Otherwise, leave the field blank for a report including all employees.
Service Calc. Group (Blank for All)	Select the Service Calculation Group for which you are requesting a report, or leave this field blank to include all service calculation groups in the report.
Show service between (date)	Enter the start and end dates of the calendar period that you want the report to include. You must enter a month, date, and year.

Source Records

EG_FLX_SVC_DT, JOB_DATA

Track Global Assignment Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphanumerically by report ID.

Note. The detailed information about the PER032 – Passport/Visa Expiration report can be found in the Administer Workforce Reports: A to Z section.

PER717 - Employees on Assignment

The report lists the employee ID, employee name, host contact ID, and the beginning and end dates of the assignment.

Source Records

ASSIGNMENT, PERSONAL DATA

Base Benefits Reports: A to Z

This section provides detailed information on individual reports including important fields and source records. The reports are listed alphabetically by report ID.

BEN001 - Health Plan Participants

This report lists active health plan participants as of a specified date. Report information includes: plan type, department ID and name, employee name and ID, employee status, type, regular/temporary, full/part-time, pay group, coverage under the plan, coverage effective date, coverage end date, and COBRA event ID.

The report inserts page breaks and totals at the company and provider levels. You'll find this report particularly useful for analyzing health plan provider usage. You can determine the number of employees who enroll in plan types offered by specific providers, thereby ascertaining the health plans that are most popular with your employees. You might also use this report to communicate covered employee data to carriers.

You'll find this report particularly useful for analyzing health plan provider usage. You can determine the number of employees who enroll in plan types offered by specific providers, thereby ascertaining the health plans that are most popular with your employees. You might also use this report to communicate covered employee data to carriers.

BEN002 - Life Insurance Participants

This report lists active life plan participants as of a specified date. Report information includes: plan type, benefit plan, department ID and name, employee name and ID, status,

type, regular/temporary, full/part-time, pay group, type of coverage within the plan type, flat dollar amount of the policy, a life insurance rating factor, and the coverage effective and end dates.

The report inserts page breaks and supplies totals at the company and provider levels.

BEN003 - Benefit Contributions Register

The report summarizes benefit contributions by employee and employer. It lists participants in benefit programs and plans and identifies both the company and employee portion of quarter-to-date and year-to-date contributions.

You make report requests for a specific quarter or month. The quarter or month you use depends on the current setting of the As of Date field. Use UTL001 or modify this date online when you request the report so that it falls within the period you would like to cover. The report sample is for a monthly register.

This report enables you to track contribution totals for your programs and plans, by employee and employer, and by the period and year-to-date. This information is helpful in determining total benefit costs by plan and forecasting or predicting future employer contributions. You can also use this report to review individual employees contributions.

(CAN) BEN003CN - Benefit Contributions Register

This report is the same as BEN003.

BEN004 - Savings Investment Distributions

This report lists the total deductions made to date and the total company contributions for employees participating in benefit programs that contain savings plans. It prints the total amount available for investment broken down by investment distribution and expressed both as a monetary amount and as a percentage of the total.

For each plan type, it shows the total amount deducted for employees in the plan type and company contributions. The report inserts page breaks and supplies totals at the company, benefit program, plan type, and benefit plan levels.

You make report requests for a specific quarter or month. The quarter or month you use depends on the current setting of the As of Date field. Use UTL001 or modify this date online when you request the report so that it falls within the period you would like the report to cover. The report sample is for a monthly register.

Use this valuable report to analyze employee utilization of investment options and for managing investment funds. Using the report, you can obtain totals by company and a grand total for all the companies you track.

BEN007 - Leave Accruals

This report displays leave accrual information by leave plan and employee. It includes information such as plan year eligibility hours, carryover hours earned year-to-date, hours taken year-to-date, and remaining leave balances.

BEN008 - Section 415 Report

The report lists employee amounts either over or under the Section 415 limit. It includes: Company, Employee ID, Effective Date, Special Accumulator, Benefit Program, Percent Of Salary, Maximum Benefit Base, and Gross Amount YTD. It also lists the plans that are excluded from and included in the 415 limit, as well as those plans that are limited.

BEN009 - Section 415 Non-Compliance Report

BEN009 reports on employees who have exceeded the Section 415 limits. It includes: Company, Employee ID, Calendar Year and Month, Gross Amount YTD, Effective Date, Earnings Code, Benefit Program, Percent of Salary, and Maximum Benefit Base.

BEN020 - FMLA Status

This report displays summary information for requests in the following classes: approaching leave requests, current FMLA leave requests, recently completed FMLA leaves and denied FMLA leave requests.

You can use this report to manage the FMLA leave process from beginning to end. A review of this report reveals those employees who will soon be going out on leave; what follow-up is needed to support the leaves; those employees who will soon exhaust their leave entitlement.

Source Records

FMLA Plan Table, Personal Data Table, FMLA Leave Request Table, FMLA Leave Activity Table

BEN021 - FMLA Payroll Audit Report

This report prints a list of employees are on leave or have recently completed their leave.

You can use this report to reconcile paid hours reported by Payroll with the FMLA hours scheduled as paid and reported as taken on the History page.

BEN022 - HIPAA Certificates

Employers are required to provide this certificate to all former employees upon termination. Certificates can be generated on demand or scheduled at regular intervals by the user.

This certificate displays a history of the former employee's Group Health coverage for all plan types specified by the user, as specified by the Health Insurance Portability and Accountability Act (HIPAA) of 1996. This certificate lists all group health coverage an employee had for the twelve month period prior to the date coverage ended due to termination of coverage. This certificate will be used by subsequent health coverage carriers to evaluate pre-existing condition clauses, if applicable.

Only plan types with the **HIPAA Plan** check box marked on the Benefit Program Table will have HIPAA history displayed on these reports.

BEN023 - HIPAA Certificates

This certificate displays a history of the former dependents Group Health coverage for all plan types specified by the user, as specified by the Health Insurance Portability and Accountability Act (HIPAA) of 1996.

BEN040 - Benefits Billing Statements

Statements are produced for each individual with an outstanding balance who is actively enrolled in the benefits billing system. Statements report: activity from/to dates; activity type, plan type, benefit plan, coverage, amount and due dates. Also included is the total due and total overdue information with any comments entered on the Billing Calendar.

BEN041 - Delinquent Accounts

This report displays charge and payment activity for employees who have failed to keep their payments current in accordance with the terms established on the Benefits Billing Plan Table.

You can use this report to determine what participants are delinquent, the number of days past due and the total amount due. You can also use this report to learn what the total number of participants past due, time overdue and the total amount due.

Source Records

Benefits Billing Charges, Personal Data, Benefits Billing Payment, Xlattable, Benefit Plan Table and Benefit Billing Enrollment

BEN042 - Accounts Receivable

This report displays all payment activity, include the amounts paid and how the amounts were applied.

You can use this report to verify the dollar amount of payments received from employees. It can also be used to determine how the moneys received were applied. You can also use this report for general ledger reconciliation and auditing.

Source Records

Benefits Billing Charges, Xlattable, Benefit Plan, Personal Data, Benefit Billing Detail, Benefit Billing Payment

BEN043 - History Activity

This report displays all billing account activity for a specific period of time by employee, posting date, activity type, plan type, benefit plan, coverage code and billing due.

You will use this report to answer questions from employees regarding their billing accounts. This report can also be used as a tool in troubleshooting and auditing billing activity. System prompts you to specify from and through dates.

Source Records

Benefits Billing Charges, Billing Calendar, Benefits Billing Payment, Benefits Billing Detail, Base Benefits tables, Benefits Billing Parameters

BEN044 - Calculation Errors Report

This report displays the messages associated with billing calculation errors generated as a result of the COBOL process

BEN045 - Benefits Billing Audit

The Benefits Billing Audit report has five sections: employees with open charges and open credits; active enrollments audit; inactive enrollments audit; employees with holds longer than 3 months; and enrollment holds longer than 3 months.

Use this report to audit billing enrollments that may require follow-up activity. For example, data will only be displayed for employees with open charges and credits when an error condition exists.

Source Records

Benefits Billing Charges, Billing Calendar, Benefits Billing Payment, Benefits Billing Detail, Base Benefits tables, Benefits Billing Parameters, Job, Personal Data

BEN050 - Primary Jobs Audit

The Primary Jobs Audit report identifies:

- Employees that don't have a record in the Primary Jobs table.
- Employees without a job record in the Primary Jobs table.
- Employees without a primary job flag turned on.
- Employees without a primary job indicated for a specific benefit record.

Employees with more than one primary job designated for a specific benefit record number.

BEN110 - Premium Report

List employees, their coverage, and premium amounts for specified vendor and plan type.

BEN140 - Payment Interface

This report lists information about Benefits Billing payments processed by the batch interface program.

The Payment Interface report can be used as an alternative to entering payments through the Payment Entry page. The system applies the payments to the charges by Plan Type within Due Date, oldest Due Date first. The payments are posted as of the Posting Date on the transaction.

Source Record

BILLPMNT

BEN141 - A/R Interface

The A/R Interface report extracts all charges for a selected billing period and any charge adjustments with posting dates that fall within the billing period. The system will produce a file called BILLAR. The output file BILLAR holds 2 types of records. One holds employee information, the other holds the accounting information for the Benefits Billing charges and charge adjustments.

Use this report to report to interface billing charges to an accounts receivable system.

Source Records

Benefits Billing Charges, Adjustments, Benefit Plan, Personal Data

BEN200 - Section 403(b) Employee Listing

This report provides information on all employees whose information is found on the Employees 403(b) Annuity Data pages.

Source Record

SAVINGS_403B_BAL

BEN201 - Section 403(b) Exceptions

This reports on employees who are approaching or exceeding limits along with other errors and exceptions.

Source Record

SAVINGS_403B_ADJ

BEN202 - Section 403(b) Employee Letters

This report lists employees who have Section 403(b) information. This report is an easily modifiable SQR combined with a Microsoft Word macro and template. The function of this report is to deliver Projection information to employees.

Source Record

SAVINGS_403B_PROJ

BEN701 - Flexible Spending Account Benefits

The Flexible Spending Account Benefits Table report lists the information in the Flexible Spending Account Table—plan type, plan name, benefit plan name and ID, effective date, pay frequency, employer contribution, flat contribution amount, employer limit percent, employee contribution percent, and employer limit amount.

Use this report to verify that you have correctly updated and made changes to the table.

Source Records

Benefits tables, FSA Benefits Table

BEN702 - Flat Rate

The report lists the rate ID, effective date, pay frequency, rate per unit, total coverage rate, and employer, employee, provider coverage rate, each of your benefit program/plans as of a specified date.

Source Records

Benefits tables, Flat Rate Table

BEN703 - Disability Plan

The report lists the rate ID, effective date, pay frequency, rate per unit, total coverage rate, and employer, employee, provider coverage rate, each of your benefit program/plans as of a specified date.

Source Records

Benefits tables, Disability Plan Table

BEN704 - Age-Graded Coverage

The Age Coverage Table report lists the effective dates of the rates and rating factors such as age ranges, sex, and smoker/non-smoker by employer and employee for each set of your age-graded rates.

Source Records

Benefits tables, Age-Graded Rate Table

BEN705 - Life AD/D

The report lists the information in the Life AD/D Table including: plan type, plan name, benefit plan ID and name, effective date, coverage, flat amount, rating factor, and group code.

Source Records

Benefits tables, Life AD/D Plan Table

BEN707 - Savings Plans/Investments

The report lists each savings plan type, benefit plan, effective date, employer investment matching option, and the terms of the employee deductions and employer contributions and investment options. The limit percent and reduction percent age are shown for highly compensated employees for both before- and after-tax amounts.

Source Records

Benefits tables, Savings Plan Table

BEN708 - Calculation Rules

The report lists your calculation rules information according to calculation rule IDs.

Source Records

Benefits tables, Calculation Rules Table

BEN709 - Benefit Plan

For each plan type and benefit plan combination, the report lists: effective date, description, provider ID and name, default deduction code and name, and the indicator for non-discrimination testing.

Source Records

Benefits tables, Benefit Plan Table

BEN710 - Leave Plan 1

This report serves as an audit trail for the information defined on the Leave Plan tables.

Source Records

Benefits tables, Leave Plan Table

BEN710A - Leave Plan 2/3

This report serves as an audit trail for the information defined on the Leave Plan tables.

Source Records

Benefits tables, Leave Plan Table

BEN711 - Retirement Plan

This report serves as an audit trail for the information defined on the Retirement Plan tables.

Source Records

Benefits tables, Retirement Plan Table

BEN713 - Benefit Program

This report serves as an audit trail for the information defined on the Benefit Program table.

Source Records

Benefits tables, Benefit Program Table

BEN714 - Service Rate

This report serves as an audit trail for the information defined on the Service Rate tab.

Source Records

Benefits tables, Service Rate Table

BEN715 - Vacation Buy/Sell

This report serves as an audit trail for the information defined on the Vacation Buy/Sell table.

Source Records

Benefits tables, Vacation Buy/Sell Table

(CAN) BEN716CN - Pension Plan 1

This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.

Source Records

Benefits tables, Pension Plan Table

(CAN) BEN717CN - Pension Plan 2

This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.

Source Records

Benefits tables, Pension Plan Table

(CAN) BEN718CN - Pension Plan 3

This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.

Source Records

Benefits tables, Pension Plan Table

BEN720 - FMLA Plan

This report serves as an audit trail for the information defined on the FMLA Plan table.

Source Record

FMLA Plan Table

BEN721 - Limit

This report serves as an audit trail for the information defined on the Limit table.

Source Record

Limit Table

BEN731 - Salary Rate

This report serves as an audit trail for the information defined on the Salary Rate table.

Source Records

Benefits tables, Salary Rate Table

BEN733 - Base Benefit Audit

The Base Benefits business process Audit Report provides a summary of potential employee data error conditions as related to Base Benefits business process that would enable you to catch errors that would otherwise show up when you try to process enrollments or changes.

The audits performed are Employees without Employment records, Employees without Job records, Employees less than 16 years old, People with unusual dependents signed up for coverage, Employee and spouse (or other dependent) both electing health benefits, Employees with over-age dependent coverage and Employees with incorrect health plans set up on the Benefit Program Table.

Perform these audits during implementation, before you enroll participants, and periodically during the plan year.

Source Records

Employee tables

BEN734 - Court Ordered Coverage Audit Report

The Court Ordered Coverage Audit report lists employees not compliant with court order benefit coverage or minimum spousal coverage.

BEN740 - Billing Calendar

Use this report to list of generated billing periods. It is also a quick reference for payment due information by billing period.

Source Record

Billing Calendar Table

CBR001 - Initial Notification Letter

This report generates letters for COBRA participants who have experienced an initial qualifying COBRA event. This includes the participant's terminating health coverage, qualified COBRA coverage, and the response dates by which they must return their election or waive request. It also includes an enrollment form that allows them to elect or waive COBRA coverage and COBRA plan options.

Source Records

COBRA Participants, Personal Data, Dependent/Beneficiary, COBRA Events, COBRA Participant Plans

CBR002 - Secondary Notification Letter

This report generates letters for COBRA participants who have experienced a secondary qualifying COBRA event. Included in the letter is information about the extension of COBRA continuation coverage for COBRA participants.

Source Records

COBRA Participants, Personal Data, Dependent/Beneficiary, COBRA Events, COBRA Participant Plans

CBR003 - Termination Letter

This report generates letters that inform COBRA participants that their COBRA coverage is about to expire. Users will generate termination letters only for COBRA participants whose coverage is about to expire.

Source Records

COBRA Participants, Personal Data, Dependent/Beneficiary, COBRA Participant Plans

CBR004 - Open Enrollment Letter

This report provides Open Enrollment forms for COBRA participants that detail the current year COBRA enrollment information and provides participants the room to designate election and dependent changes.

Source Records

COBRA Participants, Personal Data, Dependent/Beneficiary, COBRA Events, COBRA Participant Plans

CBR005 - COBRA Event Report

This report provides data about COBRA beneficiaries at the Event Level. The report will list all employees to whom an event has occurred. The qualified status will indicate to the user whether the qualified beneficiary is Qualified (QL), Not Qualified (NQ), Not qualified/duplicate (ND) or QE (Qualify Error).

Source Records

COBRA Event Table, Xlattable

CBR006 - COBRA Enrollment Report

This report provides data about COBRA participants and their Plan 1X benefit plan elections. The report will list all COBRA participants and their current elections, including Coverage Begin dates.

Source Records

Benefit Plan Type Enrollment, COBRA Health Benefit, COBRA Health Dependent

CBR007 - COBRA Audit

This report displays information on: Employees enrolled in Active and COBRA Health Coverage; Employee and Spouse (or other dependent) electing health benefits for the same Dependent ID; and employees who have overage dependents.

You can use this report to analyze whether there is an overlap in COBRA and Active coverage, whether dependents are being covered by more than one EMPLID or whether an overage dependent has not been detected.

Source Record

Employee Table

CBR008 - COBRA Administration Error

This report displays information about errors that result from running the COBRA process. The errors include COBRA event conflict, no eligible benefit program or more than one eligible benefit programs, or duplicate COBRA events.

You can use the COBRA Administration Error Report to identify and troubleshoot errors that surface as a result of COBRA processing. You can also identify these errors online. You might want to print the report and request that staff check off each error as they determine a resolution, thereby creating an audit trail for verifying that all errors have been analyzed.

Source Record

Pay Message Table

FPYG017 - (USF) FEHB Reconciliation

Federal agencies are required to send quarterly reports to major FEHB providers. These reports allow the provider to compare their enrollment records with that of the federal agency. It also provides total headcount and premium amounts.

Source Records

GVT_RUN_FGBN001, PS_PERSONAL_DATA, PS_PERS_NID, PS_HEALTH_BENEFIT, PS_DEPENDENT_BENEF, PS_HEALTH_DEPENDNT, PS_DEP_BENEF_NIF, PS_JOB

NDT004 - 401(k)/401(m) Nondiscrimination Testing

Specify 401(k) or 401(m) for the report output.

If this report is run mid-year and a forecast percentage is specified in the 401 NDT run control, the report also shows forecasted year end earnings, contributions, and related ADP/ACP results.

This report does not attempt to recalculate the Actual Deferral Percentage (ADP) or to determine whether the nondiscrimination tests passed. It assumes these tests were handled by the NDT002 or NDT003 SQRs. However, in cases where the Aggregate Limit Test must be used, this report serves as the only method to invoke the test; there is no separate SQR for this.

If the Aggregate Limit Test is invoked, each report includes results for both the 401(m) and 401(k) tests, as well as the Aggregate Limit Test pass/fail status. The system prevents you from initiating NDT004 if the run control has been updated and you have not initiated these SQRs:

- *NDT001:* This SQR lists plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.
- *NDT002:* You initiate this SQR after NDT001 to update the actual and forecasted amounts in the nondiscrimination testing run control table for the 401(k) NDT.
- *NDT003:* This SQR updates the actual and forecast 401(m) amounts in the nondiscrimination testing run control table for the 401(m) NDT.

Source Records

Benefits tables, Leave Plan Table

NDT008 - 129 Nondiscrimination Testing

If this report is run mid-year and a forecast percentage is specified in the 129 NDT run control, the report also shows forecasted year-end gross earnings and Section 129 benefits received.

PAYVNDR - Provider/Vendor

This report provides an audit of the information enter in the vendor table.

Source Records

Benefits tables, Vendor Table

RDED001 - Retroactive Deductions Requested

This report lists generated requests which have not been processed. The list is by employee ID. You can use this report to review retroactive benefit/deduction requests as part of the approval process.

Source Record

Retro Deduction Request RDED002 Retroactive Deductions in Progress - 'Calculate Status'

This report displays information on the retroactive benefits/deductions that have been processed. Details by employee includes benefit program/plan, deduction and okay to pay status. You can use this report to determine which retroactive benefits/deductions to approve/deny.

Source Record

Retro Deduction

RDED002B - Retro Ben/Ded Summary

Source Record

Retroactive Deduction table

RDED003 - Retroactive Deductions Audit - 'Loaded to Paysheet' Status

This report lists information on deduction type, deduction amount (old/new) and re-calculated deduction amounts with total due to and/or due by the employee. You can use this report to audit retroactive benefit/deduction activity.

Source Record

Retro Deduction Ded

RDED004 - Retroactive Ben/Ded Terms Calculated (Terminated Employees Loaded)

This report lists information on deduction type, deduction amount (old/new) and re-calculated deduction amounts with total due to and/or due by the employee. You can use this report to audit retroactive benefit/deduction activity.

Source Record

Retro Deduction

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 the Base Benefits business process.

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. The Base Benefits business process 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. The Base Benefits business process 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 that has the ability to influence the corporate management decisions.

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.

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.

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 an existing table.

Arrears Balance. An amount owed to either the employer or employee, usually the result of a deduction not fully taken.

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 Price. The price of the final trade for a security at the end of the trading day.
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.
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 your entire 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 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.
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. 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.
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.

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.

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 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.
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 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.

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

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.
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.
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.

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.

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). 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.
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.
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.

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. 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.

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).

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.
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.

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 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.
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. 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.
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 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 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 Scheduling)
Scheduling. A function of PeopleSoft Time and Labor and PeopleSoft Global Payroll that enables you to create work schedules and assign them to employees.
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 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 [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. 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.

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 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 Manage Variable Compensation business process. 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.

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 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.
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 (Comité d'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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