

PeopleSoft®

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Human Resources PeopleBook:
Manage French Public Sector

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Manage French Public Sector
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by 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.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, 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.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft 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 that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID 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.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, 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.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources Manage French Public Sector Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Manage French Public Sector* provides you with implementation and processing information for your PeopleSoft Human Resources Manage French Public Sector system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, 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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured.

Chapters	Description
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding...	This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.

Chapters	Description
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with PeopleSoft Human Resources Manage French Public Sector

This chapter provides an overview of the PeopleSoft French Public Sector business processes and discusses PeopleSoft French Public Sector implementation tasks.

Manage French Public Sector Business Processes

The business processes for PeopleSoft Human Resources Manage French Public Sector are:

- Administer hiring.
- Rating employees.
- Processing tenure.
- Managing the promotion probation period.
- Calculating seniority.
- Processing career advancement.
- Processing grade promotions.
- Administering reclassification.
- Managing requests.
- Managing secondment.
- Managing headcount.
- Merging French Public Sector data with PeopleSoft Human Resources data.

We discuss these business processes in the business process chapters in this PeopleBook.

Implementing PeopleSoft Human Resources Manage French Public Sector

The Manage French Public Sector table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Manage French Public Sector application tables.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences.

Important! The order in which you set up tables required to implement PeopleSoft Human Resources Manage French Public Sector may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Manage French Public Sector core application, then several tables specific to the country or industry you operate in, followed by additional Manage French Public Sector core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

The Manage French Public Sector business process requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the Manage French Public Sector business process setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Getting StartedWith PeopleSoft HRMS"</i>
2. Set up PeopleSoft Human Resources fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Getting StartedWith PeopleSoft HRMS"</i>

Setting Up Core PeopleSoft Human Resources Manage French Public Sector Tables

The steps discussed in this section suggest an order in which you define the information in your core Manage French Public Sector tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Step	Reference
1. Define status and population codes.	• Chapter 3, "Setting Up French Public Sector Tables," Defining Status and Population Codes, page 10
2. Define civil service positions.	Chapter 3, "Setting Up French Public Sector Tables," Defining Civil Service Positions, page 12
3. Define action codes and associate actions with the FPS components that use them.	Chapter 3, "Setting Up French Public Sector Tables," Setting Up Actions, page 16
4. Authorize actions by employee status or population code.	Chapter 3, "Setting Up French Public Sector Tables," Setting Up Actions, page 16
5. Authorize actions by civil service code.	Chapter 3, "Setting Up French Public Sector Tables," Setting Up Actions, page 16
6. Associate actions with necessary supporting documents.	Chapter 3, "Setting Up French Public Sector Tables," Setting Up Actions, page 16

Step	Reference
7. Create action groups by user role.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Actions, page 16
8. Define equivalent job actions.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Actions, page 16
9. Set up installation parameters.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up FPS Installation Parameters, page 27
10. Set the hiring, rehiring, and tenure action code and action reason defaults.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up FPS Installation Parameters, page 27
11. Define the seniority bonus headings, which are used to grant seniority equivalents.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up FPS Installation Parameters, page 27
12. Modify the correspondence between gross and increased indexes.	Chapter 3, “Setting Up French Public Sector Tables,” Modifying the Correspondence Between Gross and Increased Indexes, page 32
13. Define types of points to calculate the compensation amounts that are associated with the various increased indexes or references.	Chapter 3, “Setting Up French Public Sector Tables,” Defining Types of Points, page 33
14. Associate compensation references with amounts.	Chapter 3, “Setting Up French Public Sector Tables,” Defining Types of Points, page 33
15. Set up salary scales.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Salary Scales, page 35
16. Define the salary grade table components that are used to calculate the gross compensation associated with each classification.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Salary Grades, page 37
17. View the steps and indexes that are associated with a salary grade table scale. Set up steps and substeps for salary grade tables with no scale. Set up advancement rules.	Chapter 3, “Setting Up French Public Sector Tables,” Defining Steps and Substeps and Advancement Rules, page 39
18. Set up corps data.	Chapter 3, “Setting Up French Public Sector Tables,” Defining Corps, page 41
19. Set up the grade’s relationship with corps and salary grade tables and job codes.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Grades, page 42
20. Enter probation period lengths, retirement age, and pension plan code.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Grades, page 42
21. Attach collective premiums to a grade.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Grades, page 42
22. Group grades.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Grades, page 42
23. Define job codes.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs”</i>
24. Define organization types and subtypes.	Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Host Organizations, page 47

Step	Reference
25. Add an organization.	<u>Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Host Organizations, page 47</u>
26. Establish employer contribution rate.	<u>Chapter 3, “Setting Up French Public Sector Tables,” Establishing the Employer Contribution Rate, page 49</u>
27. Define component access for nonemployees.	<u>Chapter 3, “Setting Up French Public Sector Tables,” Denying Component Access to Employees Whose Hirings Haven’t Been Validated, page 49</u>

CHAPTER 2

Understanding PeopleSoft Human Resources Manage French Public Sector

This chapter provides an overview of PeopleSoft Human Resources Manage French Public Sector and discusses:

- Business processes supported by PeopleSoft Human Resources Manage French Public Sector.
- PeopleSoft Human Resources Manage French Public Sector integrations

PeopleSoft Human Resources Manage French Public Sector

PeopleSoft Human Resources Manage French Public Sector enables you to complete the hiring process for French Public Sector employees and manage these employees through probation periods, tenure, step increments, grade promotions, and secondment. You can also manage budgetary headcount using PeopleSoft Human Resources Manage French Public Sector.

After you have established French Public Sector data, you can merge it with PeopleSoft Human Resources data to utilize Human Resources functionality and reports.

PeopleSoft Human Resources Manage French Public Sector Business Processes

PeopleSoft Manage French Public Sector supports the following business processes:

- Administer Hiring.
Record new French Public Sector employees in the system and enter key data such as personal information, civil service position, and assignment and career data.
- Rating Employees.
Identify employees to be rated and calculate final ratings for each employee using a system-calculated adjustment constant.
- Processing Trainee Tenure.
Calculate tenure dates and then identify employees ready to be granted tenure. Approve or deny employees' probation periods and grant tenure.
- Managing the Promotion Probation Period.

Assign a promotion probation period to employees whose grade change implies a corps change and then validate or deny the promotion.

- Calculating Seniority and Length of Service.

Calculate an employee's seniority and length of service in a step and within grade, corps, or category.

- Processing Career Advancement.

Process automatic step or substep increments by first calculating step increment dates, then identifying employees whose step increment dates fall within a specified period, and then advancing employees through a collective process. You can also process step or substep increments in simulation or manually.

- Processing Grade Promotions.

Grade promotions involve a grade increase. First, you define promotion criteria and select promotable employees using those criteria. Then, review and edit the list of promotable employees. You can also process grade promotions in simulation.

- Administering Reclassification.

Reclassification involves updating career data with changes stemming from a change in the employee's grade and step. To begin reclassification, enter the requirements for reclassification and specify the grade and step to assign to employees meeting these requirements. Then run the reclassification in simulation. Review the list of employees generated in simulation and validate those on the list who should be reclassified. Finally, run the Reclassification Validation process to generate reclassification actions in the appropriate employee records.

- Managing Requests.

Request management enables you to enter changes to the employee's record as requests if the action needs to be approved before changes to the employee's data occur. You can create, accept, refuse, and delete requests.

- Managing Secondment.

Secondment management enables you to track employees on internal and external secondment. First you must define authorized actions for employees on secondment. Then you enter the host organization for employees on external secondment or add a concurrent job for employees on internal secondment. PeopleSoft Human Resources French Public Sector also enables you to calculate deductions and contributions for employees that are on external secondment.

- Managing Headcount.

Every year, the Finance Act determines the administrative budget, which contains the headcount for the next budget year. The headcount is allocated by grade. The Manage Budget Headcount business process helps you supervise how the budget is used.

- Merging French Public Sector Data With PeopleSoft Human Resources Data

The merge process provides an interface between French Public Sector and various PeopleSoft Human Resources business processes such as training. The merge process consists of feeding and updating the standard JOB, JOB_JR, and COMPENSATION tables (job data) with various French Public Sector tables. The system considers only actual actions, not requests. The merge process is possible only after the hire is validated.

See Also

[Chapter 4, “Hiring French Public Sector Employees,” page 53](#)

[Chapter 4, “Hiring French Public Sector Employees,” page 53](#)

[Chapter 7, “Processing Trainee Tenure,” page 113](#)

[Chapter 8, “Managing the Promotion Probation Period,” page 121](#)

[Chapter 9, “Calculating Seniority and Length of Service,” page 125](#)

[Chapter 10, “Processing Career Advancement,” page 131](#)

[Chapter 11, “Running the Retroactivity Process,” page 137](#)

[Chapter 12, “Processing Grade Promotions,” page 139](#)

[Chapter 13, “Administering Reclassification,” page 145](#)

[Chapter 14, “Managing Requests,” page 153](#)

[Chapter 15, “Managing Secondment,” page 159](#)

[Chapter 16, “Merging French Public Sector and PeopleSoft Human Resources Files,” page 167](#)

[Chapter 17, “Managing Headcount,” page 171](#)

PeopleSoft Human Resources Manage French Public Sector Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

PeopleSoft Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

The French Public Sector business process integrates with the following PeopleSoft HRMS applications:

- PeopleSoft Human Resources Manage Employee Reviews.
- PeopleSoft Human Resources Administer Workforce.
- PeopleSoft Human Resources Managing Competencies.
- PeopleSoft Human Resources Managing Positions.
- PeopleSoft Human Resources Recruit Workforce.

We discuss integration considerations in this PeopleBook.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS”

Designing Your French Public Sector Defaults and Rules

The main setup steps for PeopleSoft Human Resources French Public Sector are:

1. Define status codes.
2. Enter civil service positions.
3. Set up actions.

When you set up actions, you need to:

- a. Enter action codes.
 - b. Indicate the components where the action is available.
 - c. Create action groups if you want to restrict available actions by user role.
 - d. Indicate the actions available for specific status codes, civil service positions, and user roles.
 - e. List any supporting documents that an action requires.
 - f. Associate action codes with core PeopleSoft action codes.
4. Set up FPS Installation Parameters.
 5. Set up factors affecting compensation:
 - a. Modify correspondence between gross and increased indexes.
 - b. Define types of points.
 - c. Set up salary scales.
 - d. Set up salary grades.
 - e. Define steps and substeps and advancement rules.
 6. Set up corps and grades.
 7. Define job codes.

Enter job codes using the global Job Code Table component.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Jobs”.

8. Enter data used for employees on secondment.
 - Set up host organizations.
 - Establish the employer contribution rate.
9. Deny component access to nonemployees.

CHAPTER 3

Setting Up French Public Sector Tables

This chapter provides an overview of French Public Sector (FPS) setup and discusses how to:

- Define status and population codes.
- Define civil service positions.
- Set up actions.
- Set up retroactivity rules.
- Define individual and collective orders.
- Set up FPS installation parameters.
- Modify correspondence between gross and increased indexes.
- Define types of points.
- Set up salary scales.
- Set up salary grades.
- Define steps and substeps and advancement rules.
- Define corps.
- Set up grades.
- Define job codes
- Set up host organizations.
- Establish the employer contribution rate.
- Deny component access to employees whose hiring hasn't been validated.
- Run reports of your French Public Sector tables.

Understanding French Public Sector Setup

Before you can perform FPS-specific business processes, you must establish FPS-specific system parameters that define basic operational rules and drive the software package.

Defining Status and Population Codes

This section discusses how to add or change an employee status code.

Understanding Employee Status

The Manage French Public Sector business process manages both civil servants and contract workers. Using employee status, you can identify various populations of civil servants and contract workers and define the management rules for each.

Employee status plays a role in corps. A corps groups civil servants that have the same employee status and grade. Each corps has its own employee status that defines functions and organizes employees' careers.

You must also decide how employee compensation is determined for each employee status. There are two modes of employee compensation:

- The employee is associated with a salary grade or a step.
Compensation based on salary grade implies that the employee is associated with a salary grade table and a step; implies some business rules. This data is managed from the Career data pages.
- The employee's compensation amount is directly selected (free compensation).

French Public Sector conveys the distinction between these two modes of compensation by giving access to a data group with career (grade/step) or a data group without career (free compensation).

Page Used to Define Status and Population Codes

Page Name	Object Name	Navigation	Usage
Status/Population Codes	FPMSTATUSEE_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Status/Population Codes	Add or change an employee status code.

Adding or Changing an Employee Status Code

Access the Status/Population Codes page.

Status / Population Codes

Employee Status Code: C

Status Definition Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900  *Status as of Effective Date: Active   

*Description: Contract Employee with Career

Short Description: Cont/Car

Tenure Probation Period Length: Months

Default SetID: C 

Employee Contribution Rate: 7.00 %

☐ Civil Servant ☐ Trainee ☒ Other

☒ Career Data Authorized ☐ Automatic (Sub)Step Increment

Status/Population Codes page

Tenure Probation Period Length Enter for trainees.

Default SetID Enter the employee status code.

Note. You must set up SetIDs that match employee status codes.

Employee Contribution Rate Enter the rate used in pension contribution calculations. The deduction for civil pension contributions of employees on secondment is calculated taking into account this rate.

Civil Servant, Trainee, and Other Select the population type. Trainee means before tenure. Civil Servant means after tenure. Other is usually a contract employee.

Career Data Authorized Select to indicate this employee status code is associated with a grade and a step.

Automatic (Sub)Step Increment Select to authorize the automatic processing of step or substep increments.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding PeopleSoft HRMS System Data Regulation”

Chapter 15, “Managing Secondment,” Managing Contributions for Employees on External Secondment, page 163

Defining Civil Service Positions

The civil service position describes the activity or nonactivity of the employee. Throughout their time with the organization, employees have different civil service positions that affect career, compensation, and promotion.

This section discusses how to:

- Add or change a civil service position.
- Enter civil service position details.
- Record the proration ratios of a civil service position.

Pages Used to Define Civil Service Positions

Page Name	Object Name	Navigation	Usage
Civil Service Position Def (civil service position definition)	FPMLEGALSTA_PNL1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Civil Service Positions, Civil Service Position Def	Add or change a civil service position.
Civil Service Position Dtls (civil service position details)	FPMLEGALSTA_PNL2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Civil Service Positions, Civil Service Position Dtls	Enter civil service position details.
Proration Ratio	FPMLEGALSTA_PNL3	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Civil Service Positions, Proration Ratio	Record the proration ratios of a civil service position.

Adding or Changing a Civil Service Position

Access the Civil Service Position Def page.

Civil Service Position Def. | Civil Service Position Dtls. | Proration Ratio

Civil Service Position Code: SF2

Civil Service Position Definition Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status as of Effective Date: Active

*Description: Long Term Leave

Short Description: Long Term

*Civil Service Position Group: Activity

Text of Reference:

Career Advancement %

Seniority: 100 %

Length of Service: 100 %

Attendance

☒ Statutory ☐ Budget ☒ Potential Full-Time Equivalent ☐ Rating

Civil Service Position Def page

Civil Service Position Group	Enter the civil service position group.
Text of Reference	Enter the text that is associated with the position.
Seniority and Length of Service	Enter the percentages that are used to calculate seniority and length of service.
Statutory, Budget, Potential Full-Time Equivalent, and Rating	Indicate whether the position is considered budget headcount, statutory headcount, or potential full-time equivalent, or if the position should be considered in attendance time calculations for rating.

See Also

[Chapter 6, “Rating Employees,” page 107](#)

Entering Civil Service Position Details

Access the Civil Service Position Dtls page.

Civil Service Position Def.		Civil Service Position Dtls.	Proration Ratio
Civil Service Position Code: SF2			
Civil Service Position Details Find View All First 1 of 1 Last			
Description: Long Term Leave			
Effective Date: 01/01/1900		Status as of Effective Date: Active	
☒ Impact on Electoral Roll	☐ Secondment Position		
☐ Compensation End	☐ New Vacant Position		
☒ Automatic Advancement Auth	☐ Mandatory Full-Time		
☒ Advmnt On Merit Auth	☐ Approver Validation		
☒ Mandatory Return	☐ Finance Controller Stamp		
☒ Tenure Prob Period Suspension		Tenure Prob Period % Activity:	100
☒ Promo Prob Period Suspension		Promotion ProbPd % Activity:	100

Civil Service Position Dtls page

Impact on Electoral Roll

Select if the position does not authorize participation in elections. Informational only.

Compensation End

Select if the position suspends employee compensation. Informational only.

Automatic Advancement

Auth (automatic advancement authorization)

Select if the position authorizes automatic advancement.

If the employee's position does not authorize automatic advancement, the advancement date is postponed until the end of the position. French Public Sector calculates the seniority that the employee can carry over after advancement.

Advmnt on Merit Auth

(advancement on merit authorization)

Select if the position authorizes advancement on merit.

Mandatory Return

Select if the first action taken after terminating the position is regarded as a return action.

Secondment Position

Select if the civil service position leads to a secondment position.

New Vacant Position

You can vacate a position in the Assignment data. If this check box is selected, it means that an employee with this civil service position does not occupy his position (POSITION_NBR).

Note. Civil service position is different from position (POSITION_NBR).

Mandatory Full-Time

Select to indicate that this civil service position is not authorized for a part-time employee.

Approver Validation

For leave-type or termination-type positions, select if the civil service position change needs validation. The system uses this functionality only for CAE control.

Finance Controller Stamp

For leave-type or termination-type positions, select if the position change needs a stamp. This field is for informational purposes only and is valid only when CAE control is active.

Tenure Prob Period

Suspension (tenure probation period suspension) and **Tenure Prob Period % Activity** (tenure probation period percent activity)

Select to suspend the tenure probation period. When you suspend the tenure probation period, the tenure date is postponed taking into account the time the employee spent in this civil service position. Only 0 and 100% values for probation period percent activity are considered.

Promo Prob Period

Suspension (promotion probation period suspension) and **Promotion ProbPd % Activity** (promotion probation period percent activity)

Select to suspend the promotion probation period. Only 0 and 100% values for probation period percent activity are considered.

Recording Proration Ratios

Access the Proration Ratio page.

The screenshot shows the 'Proration Ratio' page for Civil Service Position Code SF2. The page is divided into several sections:

- Civil Service Position Code:** SF2
- Civil Service Position:** Long Term Leave (Effective Date: 01/01/1900)
- Proration Ratio:**
 - *Working Time Percentage:** 100 %
 - Main Salary:** 100 / 100
 - Secondary Salary:** 100 / 100
 - Allowances:** 100 / 100

Proration Ratio page

The proration ratio enables you to weight an employee's compensation based on the work time percentage and civil service position. Some civil service positions result in a compensation rate that is different from that dictated by the work time percentage alone.

Working Time Percentage	Select the working time percentage. Values are <i>50, 60, 70, 80, 90,</i> and <i>100</i> . For each civil service position, three proration ratios are linked to each working time percentage.
Main Salary	Enter the nominator and denominator of the fraction that is applied to the main salary. The system uses 100 as the default denominator.
Secondary Salary	Enter the nominator and denominator of the fraction that is applied to the secondary salary, including bonus. The system uses 100 as the default denominator.
Allowances	You can give allowances: • In addition to the main salary when the employee receives only part of the main salary, such as an employee on a gradual retirement plan. • Instead of the main salary, such as an employee on training leave. Enter the numerator and denominator of the fraction. The system uses 100 as the default denominator.

Note. To select a proration ratio of zero, you must have already saved the row.

Setting Up Actions

In French Public Sector, you manage employee records by event. Actions describe the event that affects the record.

This section discusses how to:

- Define an action code.
- Assign FPS components that can use the action.
- Authorize the use of the action by employee status.
- Authorize the use of the action by civil service position.
- Define an action group.
- Define authorized actions for a user role.
- List supporting documents that are required for an action.
- Associate your action codes with PeopleSoft action codes.

Pages Used to Set Up Actions

Page Name	Object Name	Navigation	Usage
Action Definition	FPM ACTION_PNL1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Actions, Action Definition	Define an action code.
Action Details	FPM ACTION_PNL2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Actions, Action Details	Assign the FPS components that can use the action.
Authorized Actions/Status	FPM ACTSTATU_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Status/Actions	Authorize actions by employee status.
Authorized Actions/CS Positn (authorized actions/civil service position)	FPM ACTLEGAL_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, CS Position/Actions	Authorize actions by civil service position.
Action Group	FPM ACTNGRP_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Action Groups	Define an action group.
Action Authorization	FPM SCTYACTN_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Action Authorization	Define action groups that are authorized for a user role.
Actions - Type of Document	FPM ACTDOC_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Actions - Types of Documents	List supporting documents that are required for an action.
Equivalent Job Action	FPM ACTION_JOB_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Equivalent Job Action	Associate your action codes with PeopleSoft action codes.

Defining an Action Code

Access the Action Definition page.

Action Definition page

Action Type	This code groups actions of the same type.
Civil Service Position Code	Select a code if the action implies a civil service position change.
Secondment Position	Displays whether the civil service position is a secondment position, based on the information entered on the Civil Service Position Dtls page for the code.
Employee Status	Available for entry when you enter a civil service position code. The action creates the employee's civil service position with the employee status you select.
Edit Individual Order and Edit Collective Order	Select to edit Crystal reports for the action. Up to five reports per status and action can be defined on the Document/Employee Status page.

Assigning FPS Components That Can Use the Action

Access the Action Details page.

Action: SFB

Action Details Find | View All First 1 of 1 Last

Description: Hire

Effective Date: 01/01/1900 **Status as of Effective Date:** Active

☒ Civil Service Positn Data Auth	☒ Personal Data Authorized
☒ Assignment Data Authorized	☐ Mandatory Expect Dt of Return
☒ Career Data Authorized	☐ Previous Instance Sen Carry Ov
☒ Compensation Dta Authorized	☐ Sanction Action
☐ Premium Data Authorized	☐ Demotion Action
☒ Bonus Data Authorized	☒ Action Hire/Re-hire
☒ Working Time Data Auth.	☐ Action Terminate Record
☒ EE Categorization Authorized	☒ Code Action to create in JOB
☐ Absence Data Authorized	

Select Updating

☒ **Grade/Step** ☐ **Step** ☐ **None**

Action Authorization Managmnt

Action Group:

Action Details page

Civil Service Positn Data Auth (civil service position data authorization), **Assignment Data Authorized**, **Career Data Authorized**, **Compensation Dta Authorized** (compensation data authorized), **Premium Data Authorized**, **Bonus Data Authorized**, **Working Time Data Auth.** (working time data authorized), **EE Categorization Authorized** (employee categorization authorized), **Absence Data Authorized**, and **Personal Data Authorized**

Select each type of employee data that is affected by the action. By selecting and clearing these check boxes, you restrict the action codes that are available in each FPS component.

Mandatory Expect Dt of Return (mandatory expected date of return)

Select to require an expected return date for some interruption actions.

Previous Instance Sen Carry Ov (previous instance seniority management carryover)

Select to have the action carry over Previous Instance Seniority on a same step. Available only if you select Career Data Authorized.

Sanction Action, Demotion Action, Action Hire/Rehire, and Action Terminate Record Select if this type of action is available for the selected action. Sanction Action and Demotion Action are available only if you select Career Data Authorized.

Code Action to Create in JOB Select to create a new data row in JOB with the selected action code.

Grade/Step, Step, and None Select the option that indicates what the action enables you to modify. Available only if you select Career Data Authorized.

Action Group Enter the action group to which you want to assign the action. Use these action groups to grant data permission security according to user role. This field is available only if you have selected Action Authorization Management in the FPS Installation Parameters component.

Authorizing Actions by Employee Status

Access the Authorized Actions/Status page.

Authorized Actions / Status

SetID: C Contract Employee with Career Insert Actions

Authorized Actions Find | View All First 1-7 of 38 Last

*Action		
-999	Do Not Delete	+ -
-SF0	Assorted Advancement	+ -
-SF1	Change of Address	+ -
-SF2	Annual Bonus	+ -
-SF3	Assignment	+ -
-SF4	Availability Leave	+ -
SF5	Availability Return	+ -

Authorized Actions/Status page

To associate a specific employee status/population code with authorized actions:

1. Enter a setID.
SetIDs are the statuses. Using setIDs enables you to narrow the action authorization.
2. Click Insert Actions to list all existing actions.
3. Add or delete actions using the Add and Delete buttons.

Authorizing Actions by Civil Service Position

Access the Authorized Actions/CS Positn page.

Authorized Actions / CS Positn

Civil Service Position Code: SF8 Secondment Insert Actions

Authorized Actions		Find View All	First	8-12 of 12	Last
*Action		Employee On Secondment	Employee Not On Secondment		
SFN	Resignation	☐	☒	+	-
SF8	Secondment Return	☒	☒	+	-
SFU	Step Increment	☐	☒	+	-
SFX	Increase of Point Value	☐	☒	+	-
SFZ	Transfer	☐	☒	+	-

Authorized Actions/CS Position page

An action is authorized only if the impacted employee has a specific civil service position.

To associate actions with civil service positions:

1. Enter a Civil Service position code.
2. Click Insert Actions to list all existing actions.
3. Add or delete actions using the Add and Delete buttons.
4. Indicate whether the action is available to employees on secondment using the Employee on Secondment check box.

Some actions can be performed only in the employee's home organization.

Creating Action Groups

Access the Action Group page.

Action groups are a list of actions to be used by different users.

Rather than list restrictions for each individual action, you associate user roles with action groups. The user can access only the actions that are included in the action group.

To create an action group:

1. Enter an action group, description, and short description.
2. Connect the action group with the action on the Action Details page.

Defining Authorized Actions by User Role

Access the Action Authorization page.

Action Authorization page

You can restrict availability by user role. This functionality is optional. To implement it, select Action Authorization Management in the FPS Installation Parameters component.

For each role, you can list the actions that are authorized.

To define the action groups authorized for a role, first select the role name that is to be modified.

Action Group Enter the action group.

Access Code Values are:

Save: The user role is authorized for this group of actions.

None: The user role is not authorized for this group of actions.

See Also

[Chapter 3, “Setting Up French Public Sector Tables,” Setting Up FPS Installation Parameters, page 27](#)

Listing Supporting Documents

Access the Actions - Type of Document page.

Actions - Type of Document

Action: SFB Hire

Supporting Documents Type Find | View All First 1 of 1 Last

*Effective Date 01/01/1900

Supporting Documents Find | View All First 1-4 of 4 Last

*Type of Document	Additional Information	
SF0001 Account Information	☐ Mandatory ☒ Optional ☐ Warning	+ -
SF0002 Degree	☐ Mandatory ☒ Optional ☐ Warning	+ -
SF0003 Domicile Voucher	☐ Mandatory ☒ Optional ☐ Warning	+ -
SF0004 Record of Civil Status	☐ Mandatory ☒ Optional ☐ Warning	+ -

Actions - Type of Document page

You can associate a list of supporting documents (for example, degrees, rent receipts) with an action. When French Public Sector updates the employee's record, it lists the supporting documents that the employee must present for an action that modifies personal data (for example, change in marital status, address change).

To associate a document with an action:

1. Enter the action code.
2. Select the type of document.
3. (Optional) Indicate whether this document is Mandatory or Optional, or if you want a Warning if the document is missing.

These options are for informational purposes only. You can build a query that uses these fields to identify whether missing documents are required (mandatory), optional, or missing but optional (warning).

You can associate multiple documents with an action.

Associating Your Action Codes With PeopleSoft Action Codes

Access the Equivalent Job Action page.

Equivalent Job Action							
Job Action Equivalent							
	*Action		Reason Code		*Equivalent Job Action	Job Action Reason	
1	SF0	Assorted Advancement			Pay Rate Change		
2	SF1	Change of Address			Detail		
3	SF2	Annual Bonus			Bonus		
4	SF3	Assignment			Transfer		
5	SF4	Availability Leave			Suspension		
6	SF5	Availability Return			Recall from Suspension/Lay	REC	
7	SF6	Demotion			Demotion		
8	SF7	Dismissal			Layoff		

Equivalent Job Action page

To assure the consistency of your application and enable you to edit legal reports that are issued by PeopleSoft, you must associate your action codes with those that are proposed by PeopleSoft. The Merge process takes these equivalencies into account.

To create equivalencies:

1. Select an action (the FPS action code).
2. Select a reason for the action.

This code is not required. If an action/reason is used to update some employee records, it must have a corresponding entry in the table. Otherwise, the merge process fails.

3. Select the PeopleSoft equivalent job action and reason in Equivalent Job Action and Job Action Reason.

The reason code is optional. The PeopleSoft job action and reason are retrieved in Job Data during the Merge process.

4. Save.

When saving, the system checks that all actions have been addressed.

See Also

Chapter 16, “Merging French Public Sector and PeopleSoft Human Resources Files,” page 167

Setting Up Retroactivity Rules

This section discusses how to set up retroactive process rules and actions.

Pages Used to Set Up Retroactivity Rules

Page Name	Object Name	Navigation	Usage
Retro Prcs Rules/Action (retroactive process rules/action)	FPMACTPRTY_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Retro Prcs Rules/Action	Set up the system to delete an action or end the retroactivity process after a retroactive event.
Retro Prcs Action Rules (retroactive process action rules)	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Retro Prcs Action Rules	Run the Retro Prcs Action Rules report (FPMACTPR) that lists the retroactivity rules for each action code.

Setting Up Retroactive Process Rules and Actions

Access the Retro Prcs Rules/Action page.

Retro Prcs Rules / Action

Action: SF2 Annual Bonus

Retroactivity Process Rules Find | View All First 1-2 of 2 Last

*Action after Retroactive Event	Retroactivity Process Method
SF2 Increase of Point Value	☒ Delete ☐ End
SF6 Demotion	☐ Delete ☒ End

Retro Prcs Rules/Action page

When deleting retroactive moves, the events to be deleted and the events that end the process are listed on a single action: the SUP Retroactive Delete action. This action uses a specific code to manage retroactive delete so that one retroactivity process is applied to all deleted actions.

Action	The action that is inserted or deleted in the employee record that generates retroactivity.
Action after Retroactive Event	Enter the action that is encountered in Career data with an effective date that is greater than the effective date of the retroactive event.
Retroactivity Process Method: Delete and End	Define the retroactive process method for each action. <i>Delete:</i> The process deletes events of this type that occur after the retroactive event before the career reconstitution. These are principally step increment or reclassification actions, which the system can restore.

End: The event ends the retroactivity process and the career reconstitution without deleting the retroactive event. Select this option for events the system cannot restore, such as grade promotions.

Defining Individual and Collective Orders

To notify employees of an action affecting them, you can specify up to five documents to print when an action occurs. The employee status code of the employee and the action determine the list of documents to print.

The documents can contain information for an individual or for a group of employees. You determine this when you define the action, by selecting Edit Individual Order and/or Edit Collective Order. Individual orders contain information for an individual, such as a document indicating that an employee was given tenure. Collective orders provide information for a group of employee, such as a document listing all employees that had an advancement during a given month.

This section discusses how to select documents to print that notify an employee of an action.

Page Used to Define Individual and Collective Orders

Page Name	Object Name	Navigation	Usage
Documents/Employee Status	FPMSTATACTDOC_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Documents/Employee Status	Select the documents to print that notify an employee of an action.

Selecting Documents to Print

Access the Documents/Employee Status page.

Documents/Employee Status page

When you enter the page, you select the employee status for which you are listing documents.

Action	Select the action for which you want to list documents. Add a new row to define additional actions for the employee status code.
Type of Order	Select the type of order for which to list documents. <i>Orders:</i> List documents to print when notifying an employee of the action. <i>Abrogation:</i> List documents to print in case of abrogation. <i>Return:</i> List documents to print when a civil service position (such as parental leave) implies a return and you are notifying the return action.
Document 1 - 5	List up to five documents that the system should print to notify an employee (of this employee status code) when the action occurs. You define the code and description of the documents in the Documents component.

Setting Up FPS Installation Parameters

FPS installation parameters enable you to define the different parameters that are used by French Public Sector processes, set up default values and store counters such as request and order numbers.

This section discusses how to:

- Set up installation parameters.
- Set the action code and action reason defaults.

- Assign default seniority bonus headings.

Pages Used to Create FPS Installation Parameters

Page Name	Object Name	Navigation	Usage
FPS Installation Parameters 1	FPMSYSTEM_PNL1	Set Up HRMS, Install, Product and Country Specific, FPS Installation Parameters, FPS Installation Parameters 1	Set up installation parameters.
FPS Installation Parameters 2	FPMSYSTEM_PNL2	Set Up HRMS, Install, Product and Country Specific, FPS Installation Parameters, FPS Installation Parameters 2	Set the action code and action reason defaults, which are used for hiring, rehiring, and tenure.
Sen Bonus Headings (seniority bonus headings)	FPMBON_ITM_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Seniority Bonus Headings	Define the seniority bonus headings, which are used to grant seniority equivalents and seniority bonus.
FPS Installation Parameters 3	FPMSYSTEM_PNL3	Set Up HRMS, Install, Product and Country Specific, FPS Installation Parameters, FPS Installation Parameters 3	Assign default seniority bonus headings.

Modifying Installation Parameters

Access the FPS Installation Parameters 1 page.

FPS Installation Parameters 1

FPS Installation Parameters 2

FPS Installation Parameters 3

Hours Type:

STA

Standard Hours

Compensation Frequency:

M

Monthly

Retirement Age:

Days Before Tenure:

30

Days Before (Sub)Step Incremnt:

30

Seniority Calculation

☒ Calendar
☐ Thirtieth

Terminating Date:

A

Anniversary Date

☐ Auto Step Increment at Tenure
☐ Auto Hire Validation
☒ Control Reduc Step Length
☐ CAE Control
☐ Action Authorization Managmnt

Last Order Number:

44

PSoft Ref Collective Order:

Last Request Number:

6

Last CAE Number:

9

FPS Installation Parameters 1 page

Hours Type	Select the default value for how you track time. This is the schedule most employees work.
Compensation Frequency	Select the default value for how often you pay employees.
Retirement Age	Enter the default value for the age at which most employees retire. This value is used as the default retirement age when you define a new grade.
Days Before Tenure	This value is used by the tenure process to search for the next employees to be given tenure. The tenure process selects trainees whose tenure date is earlier than today's date plus the number of days you enter here. The default value is 30 days. For example, if today is June 12th and a trainee's tenure date is July 1st, if the number of days is: • 30, the process selects the employee for tenure validation. • 15, the process does not select the employee. This same value is used to validate promotion probation periods. You cannot validate the probation period before the probation period end date.
Days Before (Sub)Step Increment (days before substep or step increment)	The system uses this value to search for employees due for step or substep increments. The system selects trainees whose advancement date is earlier than the processing date plus the number of days you enter here. You can select between 1 and 99 days before tenure. For example, if the processing date is June 12th and an employee's advancement date is July 1st, if the number of days is: • 30, the process selects the employee for step or substep increment. • 15, the process does not select the employee.
Calendar and Thirtieth	Select a calendar basis or a Thirtieth basis (30 days a month). Applies to all date calculations in the tenure, seniority, and advancement processes.
Terminating Date	Determines when the advancement date takes effect: <i>A</i>: At the anniversary date. <i>B</i>: At the beginning of the month. <i>E</i>: At the beginning of next month.
Auto Step Increment at Tenure	Select to have Auto Step Increment at Tenure selected by default when defining a new grade.
Auto Hire Validation	Select to have Auto Hire Validation selected by default when defining a new job code.
Control Reduc Step Length (control reduction step length)	Select to have Control Reduc Step Length selected by default when defining a new corps.

CAE Control	Select to set up a firm CAE management. This option gives the budget process supervisors a tool to monitor how the budget is managed.
Action Authorization Management	This is a system-wide option. It is applied to FPS workforce administration and enables you to restrict the authorized action list depending on the role.
Last Order Number	This value is updated and stored in the system parameters when a recorded action can be notified by an order.
PeopleSoft Ref Collective Order	This value is updates and stored in the system when a collective order is edited.
Last Request Number	This value is updated and stored in the system parameters when a request is recorded in the employee record.
Last CAE Number	This value is updated and stored in the system parameters when a new CAEC is created. The system updates this number only when the CAE Control field is selected.

See Also

[Chapter 17, “Managing Headcount,” Managing CAE, page 183](#)

[Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Actions, page 16](#)

Setting the Action Code and Reason Defaults

Access the FPS Installation Parameters 2 page.

FPS Installation Parameters 1	FPS Installation Parameters 2	FPS Installation Parameters 3
Action for Hiring:	SFB	Hire
Action for Re-hiring:	SFM	Rehire
Action for Position Data Chnge:	SFJ	Position Change
Action for Grade Promotion:	SFA	Grade Promotion
Action for (Sub)Step Increment:	SFU	Step Increment
(Sub)Step Incrmnt Reason:		
Tenure Step Increment Reason:		
Action for Tenure		
Without Seniority Carry Over:		
With Seniority Carry Over:		
Tenure Reason:		

FPS Installation Parameters 2 page

Note. The default action codes you define on this page are for FPS components only.

Action for Hiring	Enter an action code to use as the default in the Initialize Status FPS and Employee Record FPS components.
Action for Re-hiring	Enter an action code to use as the default when rehiring employees.
Action for Position Data Change	Enter an action code to use as the default when updating FPS incumbent records when position data is modified.
Action for Grade Promotion	Enter an action code to use as the default for grade promotion.
Action for (Sub)Step Increment	Enter an action code to use as the default for step increment.
(Sub)Step Incrmnt Reason	Enter an action code to use as the default for step increments.
Tenure Step Increment Reason	Enter the reason for the step increment done at tenure. This field is available when you select the Auto Step Increment at Tenure check box on the FPS Installation Parameters 1 page.
Action for Tenure	
Defines the action code reserved for tenure.	
Without Seniority Carry Over	Select when tenure is associated with step increment without seniority carry over.
With Seniority Carry Over	Select when tenure does not imply step increment with seniority carry over.
Tenure Reason	Automatic step increment at tenure is linked to Grade Definition. The code is initialized by the value entered.

Assigning Default Seniority Bonus Headings

Access the FPS Installation Parameters 3 page.

FPS Installation Parameters 1

FPS Installation Parameters 2

FPS Installation Parameters 3

Career Seniority Heading Nb:	SF001		Career Seniority
Military Service Sen Hding Nb:	SF002		Military Service Seniority
Work Exp Sen Heading Nb:	SF003		Work Experience Seniority
Competence Sen Heading Nb:	SF004		Competency Seniority

FPS Installation Parameters 3 page

Career Seniority Heading Nb (career seniority heading number)	Enter the seniority bonus heading for seniority obtained in another organization.
Military Service Sen Hding Nb (military service seniority heading number)	Enter the seniority bonus heading for seniority obtained during military service.

Work Exp Sen Heading Nb
(work experience seniority
heading number)

Enter the seniority bonus heading for the equivalent of a work experience outside the public sector.

Competence Sen Heading Nb (competence seniority
heading number)

Enter the seniority bonus heading for the equivalent of specific competencies.

Modifying the Correspondence Between Gross and Increased Indexes

Increased indexes enable you to calculate the employee's base compensation. Several gross indexes can correspond to one increased index. Gross indexes cannot be modified.

This section discusses how to modify the correspondence between gross and increased indexes.

Page Used to Modify the Correspondence Between Gross and Increased Indexes

Page Name	Object Name	Navigation	Usage
Gross/Increased Index	FPMGROSSIND_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Gross/Increased Index	Modify the correspondence between gross and increased indexes.

Modifying the Correspondence Between Gross and Increased Indexes

Access the Gross/Increased Index page.

Gross / Increased Index

Gross Index Table Code: BRUT

Gross Index - Increased Index Link Table Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

Gross Index - Increased Index Link Table Find | View 100 First 1-7 of 916 Last

*Gross Index	Increased Index	
100	164	+ -
101	165	+ -
102	165	+ -
103	166	+ -
104	167	+ -
105	168	+ -
106	168	+ -

Gross/Increased Index page

To modify gross and increased index correspondence, insert a new effective date and create new correspondences. Former correspondences are committed to history.

Defining Types of Points

You use points to calculate compensation amounts associated with various increased indexes or references. You can create several point types that correspond to various populations.

There are two general types of points in French Public Sector:

- Those that set up compensation grids with references.

In this case, the type of point must begin with the letter *X*. The grid is filled in manually.

- Those that automatically set up compensation grids taking into account increased indexes and the point value (for civil servants, this value is determined by an order).

This is the general type of point.

This section discusses how to:

- Add or change point types.
- Set up the relationship between the reference and the amount.

Pages Used to Define Types of Points

Page Name	Object Name	Navigation	Usage
Types of Points	FPMPOINTYP_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Types of Points, Types of Points	Add or change point types.
Index/Amounts	FPMINDEXAMT_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Types of Points, Index/Amounts	Set up the relationship between the reference and the amount.

Adding or Changing Point Types

Access the Types of Points page.

The screenshot shows the 'Types of Points' page. At the top, there are two tabs: 'Types of Points' and 'Index / Amounts'. Below the tabs, the 'Point Type Code' is set to 'XR'. The main section is titled 'Point Type Definition' and contains several fields:

- *Effective Date: 01/01/2002
- *Status as of Effective Date: Active
- *Description: Reference Type of Point XR
- Short Description: Point XR
- Point Value: (empty field)
- *Rate Code: NAANNL (with a search icon) - Default NA Annual
- *Currency Code: EUR (with a search icon)
- Compensation Frequency: Annual
- Standard Hours: 169.00 (with a search icon) - Monthly
- Order Date: 01/01/2002
- Application Date: 01/01/2002

Types of Points page

To define types of points:

1. Enter a point type code.
2. Enter a point value for a general type of point (those without the X prefix).

You can only enter point values for the general type of point.

3. Enter a rate code value to calculate the compensation amounts.

If a point value has been defined, the system displays only points rate codes (instead of flat amount rate codes) with an annual frequency.

If the point type code is prefixed by X, the system displays only flat amount rate codes with annual, monthly, or hourly frequency.

4. Enter a standard hours value to calculate the compensation amounts.

Setting Up the Relationship Between the Reference and the Amount

Access the Index/Amounts page.

Types of Points
Index / Amounts

Point Type Code: XR

Amounts
Find | View All
First 1 of 1 Last

Description: Reference Type of Point XR

Effective Date: 01/01/2002
Status as of Effective Date: Active

Rate Code: NAANNL Default NA Annual

Comp Freq: Annual

Currency Code: EUR

Customize | Find | View All
First 1-3 of 20 Last

Reference	Annual Amount	Monthly Amount	Amount per Hour		
1	11900.000	991.67	5.87	+	-
2	12500.000	1041.67	6.16	+	-
3	13750.000	1145.83	6.78	+	-

Index/Amounts page

Note. There is a PeopleCode—located in the FPMPOINTYP_TBL record, EFFDT.RowInit event—to generate all increased indexes for general types of points.

The system displays the associated rate code, currency, and frequency. Click the Add button to add a new row if required.

To set up the reference grid:

- Select an annual amount, a monthly amount, and/or an amount per hour according to the frequency that is defined for the rate code.
- For each amount, you can obtain a correspondence in another currency either by triangulation or by direct calculation. Click the Display in Other Currency button for direct calculation.
- The unavailable amounts are automatically calculated. The amounts are calculated for the frequencies that are delivered by PeopleSoft (hourly, monthly, annual) and according to standard hours.

Setting Up Salary Scales

During their career, employees are assigned to steps that determine their compensation level. One way of defining steps is a salary scale.

The salary scale enables you to select a type of point and to associate a step list with gross indexes. The step number defines the step increment order within the scale. A salary scale is always associated with a salary grade table. Also, a scale can be associated with one or more salary grade tables.

This section discusses how to set up salary scales.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Salary Grades, page 37

Page Used to Set Up Salary Scales

Page Name	Object Name	Navigation	Usage
Salary Scales	FPMSCALE_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Salary Scales	Set up salary scales.

Setting Up Salary Scales

Access the Salary Scales page.

Salary Scales

Scale: SF1

Scale Definition Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status as of Effective Date: Active

*Description: Scale 1

Short Description: Scale 1

*Point Type Code: S1

1st Step Code in SalaryGdTbl: 01 Last Step Code in SalaryGdTbl: 08

Steps Find | View All First 1-4 of 8 Last

*Step	*Step Nber	*Gross Index
01	1	244
02	2	250
03	3	260
04	4	268

Salary Scales page

To set up salary scales:

1. Enter a scale code.
2. Select a point type.

Once you have selected a point type, you cannot modify it.

3. Enter the step, step number and gross index that are associated with the scale.

The system uses the Step Nber (step number) fields to determine the first and last steps in the scale.

4. Click the Add button to create additional values.
5. Save the page.

Setting Up Salary Grades

Civil servant grades are associated with a salary grade table. The component of a salary grade tables is the step. Each step has a corresponding gross index and (usually) the number of months that are required for the next step increase. When employees move to a new grade, they are positioned in a step in the salary grade table. Their base compensation that is associated with the step is determined by one of the following:

- Gross index and increased index.

When entering the gross index, the system retrieves the corresponding increased index.

- Annual compensation value for substep.
- Increased index.
- Reference (when the type of point is prefixed by X).

Some grades in French Public Sector are partly or totally classified as *off-scale* groups that use a scale that is not based on number of points. The system uses letters to refer to these rate groups. In this case, the specific steps can be divided in substeps. Scale letters and substeps characterize these classifications.

This section provides an overview of salary grade table (SGT) definition and SGT/scales correspondence and discusses how to define the salary grade table.

Understanding Salary Grade Table (SGT) Definition and SGT/Scales Correspondence

A salary grade table is composed of a series of steps or substeps and the definitions of advancement rules between them. A salary grade table that can contain substeps is called an *off-scale* salary grade table. A salary grade table must also identify whether or not it is for the public sector and must be able to accept an entry bonus.

A salary grade table can contain a salary scale. It is then composed of the scale's steps that are associated with the same gross indexes. When no scale is associated with a salary grade table, such as with off-scale salary grade tables, you must manually enter the steps and indexes.

According to the salary grade table's type of point and public sector salary grade table status, the step is associated with a gross index, an increased index, or a reference.

Type of Point	Salary Grade Table	Step
Standard Type of Point	Public	Gross Index
Type of Point X	Non-Public	Reference
Standard Type of Point	Non-Public	Increased Index

Page Used to Set Up Salary Grades

Page Name	Object Name	Navigation	Usage
Salary Grade Tbl Types (salary grade table types)	FPMMATXTYP_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Salary Grade Type	Add or modify salary grade table types.
Salary Grade Table	FPMSALMATRX_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Salary Grade Tables	Define the salary grade table.

Defining the Salary Grade Table

Access the Salary Grade Table page.

Salary Grade Table

Salary Grade Table Type: SF1 Civil Servants
 Salary Grade Table Code: SF01 Scale: SF1

Salary Grade Table Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status as of Effective Date: Active
 Public Sector Salary Tbl ☒ Yes ☐ No Off-Scale ☐
 *Description: Salary Grade Table 1
 Short Description: Salary Gra
 Order Date: Application Date:
 *Application Sector: SF01 Administration
 *Point Type Code: S1 Civil Servant Point
 1st Step Code in SalaryGdTbl: 01 Last Step Code in SalaryGdTbl: 08
 Bonus for Entering SalaryGdTbl: Y/M/D Comments

Salary Grade Table page

To add a salary grade, enter the salary grade table type, code, and scale code.

Public Sector Salary Tbl
(public sector salary table)

Indicate whether the salary grade table is for the public sector. Once you save this page, you cannot modify this field.

Off-Scale

Select if the salary grade table is off-scale. If you do not select this check box, the salary grade table is composed of steps. Otherwise, it can be composed of substeps. Once you save this page, you cannot modify this field.

Order Date

Enter the issue date of the government order or decree that defines the salary grade table.

Application Date

Enter the date the salary grade table becomes active; this date should usually be equal to the effective date.

Point Type Code	Displays a value if you have selected a scale. Otherwise, enter a value. Once you save this page, you cannot modify this field.
1st Step Code in SalaryGdTbl (first step code in salary grade table) and Last Step Code in SalaryGdTbl (last step code in salary grade table)	Displays a value if you have selected a scale. The value is updated when you save the Steps - Advancement Rules page.
Bonus for Entering SalaryGdTbl (bonus for entering salary grade table)	Enter the value in years/months/days.
Comments	Click to enter or view comments about the salary grade table.

Defining Steps and Substeps and Advancement Rules

After establishing salary grade tables, you need to:

- Define the steps and substeps for salary grade tables that are not associated with a scale.
- Set up the salary grade table advancement rules.

You must indicate the step or substep length, the theoretical career seniority, the classification number that enables you to define step increment in the salary grade table and next step in case of automatic advancement.

A single scale can be associated with several salary grade tables with different advancement rules.

This section discusses how to define salary grade table steps and substeps and advancement rules.

Page Used to Define Steps and Substeps and Advancement Rules

Page Name	Object Name	Navigation	Usage
Steps - Advancement Rules	FPMSALSTEP_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Salary Grade Steps	View the steps and indexes that are associated with a salary grade table scale. Set up steps and substeps for salary grade tables with no scale. Set up advancement rules.

Defining Salary Grade Table Steps and Substeps and Advancement Rules

Access the Steps - Advancement Rules page.

Steps - Advancement Rules			
Salary Grade Table Type:	SF1	Civil Servants	
Salary Grade Table Code:	SF01 / SF1		
Salary Grade Table Find View All First 1 of 1 Last			
Description:	Salary Grade Table 1		
Effective Date:	01/01/1980	Status as of Effective Date:	Active
Point Type Code:	S1	Civil Servant Point	334.1900 FRF
Application Sector:	SF01	Administration	Std Hrs/Wk: 169.00
Steps - Indexes - Step Increment Rules Find View All First 1 of 8 Last			
☐ Scale letter / Sub-Step	*Step		
☐ Step	*Step Number		
Length in (Sub)Step:	2 / / Y/M/D	Step Attribute:	Normal
Min Lgth for (Sub)Step Incr.:	1 / 6 / Y/M/D	Compensation Rate	
Theoretical Career Seniority:	/ / Y/M/D	Rate Code:	KF006 Base Salary in Points
Gross Index:	244	Comp Rate:	84550.070000
Increased Index:	253	Currency:	FRF
Automatic (Sub)Step Increment	☒	Comp Freq:	Annual
		Next (Sub)Step for Increment:	02

Steps - Advancement Rules page

For salary grade tables that are not associated with a scale, you must:

1. Enter the salary grade table type and code.
2. Enter steps by specifying the step or substep, step number, and index associated with the step/substep.

Note. You can't enter steps for salary grade tables that are associated with a scale.

Scale letter/Sub-Step

Substeps imply an additional subdivision. The employee is granted a substep within a scale letter. A scale letter is associated with a corresponding step; it can be composed of several substeps. If the salary grade table has been set up off-scale, you can indicate if the defined classification is a step or a scale letter/substep pair. The default classification is the step.

Step

If the salary grade table is not off-scale, then it is composed of steps only.

*Step or *Substep

Enter the step or substep code.

Length in (Sub)Step

Enter the average duration in step or substep, in years/months/days. Employees cannot be granted substep length reductions. However, they can be granted length reductions in the step that corresponds to the scale letter.

Min Lgth for (Sub)Step Incr (minimum length for step or substep increment)

Enter the minimum length of time that an employee must stay in a step or substep before the system applies a seniority bonus.

Theoretical Career Seniority

The theoretical career seniority (or salary grade table seniority) calculates the seniority in grade (or in salary grade table) of an employee:

1. Who entered the grade with zero seniority.
2. Whose civil service position has been constantly active.

3. Whose step increments have been processed based on the average statutory length.

Note. These three conditions are the official definition of theoretical career seniority, but the system does not check for these conditions when you assign career seniority.

Theoretical career seniority enables you to position an employee entering your organization in the salary grade table according to the seniority equivalents granted and the salary grade table entry.

Gross Index	Define for a step.
Increased Index	Define for a step.
Automatic (Sub)Step Increment and Next (Sub)Step for Increment	Select to indicate employees can automatically move to the next step or substep. If you select the check box, you must enter the next step or substep.
Step Attribute	Values are <i>Normal</i> , <i>Temporary</i> and <i>Exceptional</i> .
*Step Number	Indicates the rank of the step in the salary grade table.
Comp Rate (compensation rate)	The rate code that is associated with the salary grade table type of point is displayed. The annual amount is displayed in the currency that is associated with the rate code. You can modify the frequency and view the corresponding compensation. This functionality is for reference only; the modifications are not recorded by the system.

Defining Corps

A corps groups civil servants by employee status and grade; a corps contains one or more grades. The employee status of civil servants in a corps determines the civil service category (A, B, C...) of each corps.

This section discusses how to add or change corps.

Page Used to Define Corps

Page Name	Object Name	Navigation	Usage
Corps	FPMCORPS_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Corps	Add or change corps data.

Adding and Changing Corps

Access the Corps page.

Corps

Corps: SFC005

Corps Definition Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1900 ***Status as of Effective Date:** Active

***Description:** Administrative Secretary

Short Description: Adm Secret

Sending Department: Department of Public Works

Civil Service Category

☐ A ☒ B ☐ C ☐ D ☐ No Existing Category

Category Level:

☐ Control Reduc Step Length

Corps page

To add or change corps:

1. Enter the corps code.
2. Enter a description and the sending department.
3. Select the corps classification and category level in the Civil Service Category group box.
4. Select Control Reduc Step Length (control reduction step length) to have the system check that the day compilation is lower than the difference between the step increment minimum length and the step length when an employee is granted a bonus.

Setting Up Grades

Employee's grades enable them to benefit from the compensation that is associated with the grade.

A grade is part of a grade group and is associated with a salary grade table. A grade group is associated with a corps and a category.

You can attach collective premiums to the grade. These premiums are also assigned a rate code. Grade-attached premiums can be expressed in the form of a flat amount, a number of points, or a percentage of either the main or the base salary. You can attach several premiums to the same grade.

This section provides an overview of grade groups and discusses how to:

- Group grades within a corps.
- Set up a grade's relationship with corps, salary grade tables, job codes.
- Enter period lengths, retirement age, and pension plan code.
- Attach collective premiums to a grade.

Understanding Grade Groups

A grade group is a concept that falls halfway between grades and corps that is used in Territorial and Hospital Public Sectors. It enables you to group grades depending on one corps. One example of how you might use grade groups is to promote employees who belong to this group.

Pages Used to Set Up Grades

Page Name	Object Name	Navigation	Usage
Grade Grouping	FPMRANKGRP_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Grade Groups	Group grades within a corps.
Grade Definition	FPMRANK_PNL1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Grades, Grade Definition	Set up the grade's relationship with corps, salary grade tables, job codes.
Grade Other Information	FPMRANK_PNL2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Grades, Grade Other Information	Enter period lengths, retirement age, and pension plan code.
Grade Premiums	FPMRANK_PNL3	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Grades, Grade Premiums	Attach collective premiums to a grade.

Grouping Grades Within a Corps

Access the Grade Grouping page.

Grade Grouping

Grade Group: SF0002

Grade Group		Find View All	First	1 of 1	Last
*Effective Date:	01/01/1980	*Status as of Effective Date:	Active	+	-
*Description:	Administrative Employee				
Short Description:	Admin Emp				
*Corps:	SFC003	Administratif Employee			
Level:	C /				

Grade Grouping page

Corps

Associate a corps with the grade group.

Setting Up the Grade's Relationship with Corps, Salary Grade Tables, and Job Codes

Access the Grade Definition page.

The screenshot shows the 'Grade Definition' page for SetID SF001 and Grade SFG001. The page is divided into three tabs: 'Grade Definition', 'Grade Other Information', and 'Grade Premiums'. The 'Grade Definition' tab is active, showing a form with the following fields and values:

- *Effective Date:** 01/01/1980
- *Status as of Effective Date:** Active
- *Description:** Employee of Service
- Short Description:** Emp Serv
- Description:** Employee of Service
- Grade Group:** (empty)
- Serial Nbr:** (empty)
- *Corps:** SFC002
- CS Catgy:** D
- Salary Grade Table Type:** SF2
- Off-Scale:** ☐
- Salary Grade Table Code:** SF02
- Scale:** SF1
- Job Code:** (empty)
- Jobcode SetID:** (empty)

Grade Definition page

Grade Group If the grade is part of a grade group, select the grade group code.

Salary Grade Table Code Employees are assigned successive steps of the salary grade table that is associated with their grade.

Off-Scale Select if you can enter an off-scale salary.

Job Code Enter the grade's default job code.

Entering Period Lengths, Retirement Age, and Pension Plan Code

Access the Grade Other Information page.

Grade Definition		Grade Other Information		Grade Premiums	
SetID:	SF001	Grade:	SFG001		
Grade Other Information Find View All First ◀ 1 of 1 ▶ Last					
Description:	Employee of Service				+ -
Effective Date:	01/01/1980	Status as of Effective Date:	Active		
Tenure Prob Period Length:	12	Months			
Prob Period Length:	12	Months			
Mini Age to Enter Grade:					
Retirement Age:					
Grade Promotion/Same Job:	🔍				
Pension Plan Code:	🔍				
Auto Step Increment at Tenure	☐				

Grade Other Information page

- Tenure Prob Period Length** (tenure probation period length) Enter the length of the probation period when the employee enters the organization.
- Prob Period Length** Enter the length of the probation period for grade promotions.
- Mini Age to Enter Grade** (minimum age to enter grade) Enter the minimum age required to enter the grade.
- Grade Promotion/Same Job** Enter the grade for automatic grade promotion. Informational only.
- Auto Step Increment at Tenure** Select if an automatic step increment should occur when tenure is validated.

Attaching Collective Premiums to a Grade

Access the Grade Premiums page.

Grade Definition		Grade Other Information		Grade Premiums							
SetID:	SF001	Grade:	SFG001								
Premiums Find View All First ◀ 1 of 1 ▶ Last											
Description:	Employee of Service				+ -						
Effective Date:	01/01/1980	Status:	Active								
Pay Components Customize Find View All 🔍 First ◀ 1 of 1 ▶ Last											
	*Rate Code	Description	Comp Rate	Points	Percent	Rate Code Group	Currency	*Comp Freq	Apply FTE	*Pro-Ration Row Type	
1	KF0005 🔍	Base Salary	10000.000000 🔍				FRF 🔍	Monthly ▼	☒	None ▼	+ -

Grade Premiums page

In the Manage French Public Sector business process, different proration factors can be applied to different compensation elements in a civil servant or contract worker's compensation package. The different proration factors depend on the FTE (full-time equivalency) and the civil service position. Consequently, you have to indicate if the premiums are related to the main compensation or to the secondary compensation. The Merge process applies the main compensation proration factor.

Rate Code	Enter the rate code associated with the premium. Depending on the rate code type (flat amount, percentage, or points), you can enter a compensation rate, the number of points, or the percent and the rate code group. This flexibility enables you to apply a premium to the main salary or to the base salary. To apply a premium to: • The main salary, use a rate code or define a rate code group that contains the rate code that is related to the indexed salary. • The base salary, group the rate codes that are related to the indexed salary and the additional compensation items.
Comp Rate (compensation rate) and Rate Code Group	If you selected a <i>Percentage</i> rate code, the Comp Rate field is unavailable, and the Rate Code Group field is available for entry. Enter the rate code group on which the percentage is going to be applied.
Points	If you selected a <i>Points</i> rate code, you can enter the number of points.
Apply FTE	If you selected a rate code other than <i>Percentage</i> , this field is selected or not based on the rate code definition.
Pro-Ration Row Type	If Apply FTE is selected, indicates if the premium is considered main or secondary compensation.

See Also

[Chapter 16, "Merging French Public Sector and PeopleSoft Human Resources Files," page 167](#)

Defining Job Codes

The job code is a unique code that you associate with a specific job in your organization.

Just as grades are shared between different statuses, jobs are shared among the entities that compose your organization.

An entity enables you to decentralize management of your organization. If you want to centralize corporate data management, use one setID.

In the FPS business process, you can attach collective premiums to a job code. The business rules are similar to the grade premiums business rules.

This section discusses how to attach collective premiums to a job code.

Page Used to Define Job Codes

Page Name	Object Name	Navigation	Usage
Jobcode Premiums	FPMJB_RATECODE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Jobcode Premiums	Attach collective premiums to a job code.

Attaching Collective Premiums to a Job Code

Access the Jobcode Premiums page.

Jobcode Premiums page

The fields on this page are similar to those on the Grade Premiums page.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” [Attaching Collective Premiums to a Grade, page 45](#)

Setting Up Host Organizations

When employees are on external secondment, they are moved to an organization that is selected from a predetermined list. To avoid redundant data and make your search easier, two levels of organization classification are suggested:

- Type of organization
- Subtype of organization

This section discusses how to add or change an organization.

Pages Used to Set Up Host Organizations

Page Name	Object Name	Navigation	Usage
Types of Organizations	FPMORGTYP_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Type of Organization	Add or change an organization type.
Organization Sub-types	FPMORG_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Sub-types of Organization	Add or change an organization subtype.
Organization	FPMINDBTORG_PNL1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Organizations, Organization	Add or change an organization.
Address	FPMINDBTORG_PNL2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Organizations, Address	Enter an organization's address.

Adding or Changing an Organization

Access the Organization page.

Organization Code: SF001

Organization

*Effective Date: 01/01/1980

*Status as of Effective Date: Active

*Description: Department of Transportation

Short Description: Transport

Organization Type: SF02 Department

Organization Sub-Type:

☒ Liable Organisation

Organization page

Organization Sub-Type

The available values depend on the organization type.

Liable Organisation

Select to indicate that the organization is liable for the “employer” civil pension contribution.

Establishing the Employer Contribution Rate

This section discusses how to establish the employer contribution rate.

Page Used to Establish the Employer Contribution Rate

Page Name	Object Name	Navigation	Usage
Employer Contribution Rate	FPMCNTTB_EMPLOY_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Employer Contribution Rate	Establish employer contribution rate.

Establishing the Employer Contribution Rate

Access the Employer Contribution Rate page.

Employer Contribution Rate page

Employer Contribution Rate

Enter the rate that is used in pension contribution calculations. In French Public Sector, the deduction for civil pension contributions of employees on secondment is calculated from that rate.

See Also

[Chapter 15, “Managing Secondment,” Managing Contributions for Employees on External Secondment, page 163](#)

Denying Component Access to Employees Whose Hirings Haven’t Been Validated

You may want some components to be inaccessible to employees whose hirings haven’t been validated. Using the Component not authorized page, you can define which components cannot be accessed by these employees.

This section discusses how to select the components that are to be inaccessible to employees whose hirings haven’t been validated.

Page Used to Deny Component Access to Employees Whose Hirings Haven't Been Validated

Page Name	Object Name	Navigation	Usage
Component not authorized	FPMPNLGRP_HIRE	Set Up HRMS, Security, Prehire Unauthorized Comp FPS	Select the components that are to be inaccessible to employees whose hirings haven't been validated.

Selecting Components That are to be Inaccessible to Employees Whose Hirings Haven't Been Validated

Access the Component not authorized page.

Component not authorized page

To deny employees whose hiring haven't been validated access to a component, enter the component name and the market. Once the hiring has been validated, the employee can access all of the pages on this list.

Running French Public Sector Table Reports

You can generate reports of the data in your French Public Sector setup tables using run control pages available in the Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS menu. The following reports are available:

- Action List – Report 1 (FPMACT1) that lists action definition part 1.
- Action List – Report 2 (FPMACT2) that lists action definition part 2.
- Actions/CS Position report (FPMACTLE) that lists actions authorized by civil service position.
- Retro Prcs Action Rules report (FPMACTPR) that lists retroactivity rules.
- Actions/Status report (FPMACTST) lists actions authorized by status.
- Occupation report (FPMBUISN) lists occupation codes.
- Corps report (FPMCORPS) lists corps definitions.
- Index Value report (FPMINDEX) lists index/amount values.
- Job Code report (FPMJOB CD) lists job code definitions.
- Civil Service Position report (FPMLEGAL) lists civil service position definitions.
- Type of Point report (FPMPOINT) lists type of point definitions.
- Grade List – Report 1 (FPMRANK1) lists grade definition part 1.

- Grade List – Report 2 (FPMRANK2) lists grade definition part 2.
- Sal Grade Table/Scale-Steps report (FPMSALST) lists the salary grade table steps.

CHAPTER 4

Hiring French Public Sector Employees

This chapter provides an overview of the hiring process and discusses how to:

- Create an employee ID.
- Initialize employee status.
- Update the employee record.
- Assign seniority bonuses.
- Validate the hiring process.
- Rehire an employee.
- Add concurrent jobs.
- Hire an applicant.
- Delete an employee hiring.

Understanding the Hiring Process

When you hire employees, you must record them in French Public Sector and enter key data such as personal information, civil service position, and assignment and career data. You enter some of this data on pages specific to French Public Sector and some in global PeopleSoft Human Resource components.

The hiring process is composed of four main steps:

1. Creating an employee ID.
2. Initializing employee status.
3. Updating the employee record.
4. Validating the hiring process.

Note. The FPS hiring process is a one way process. Once a step has been completed, it cannot be revised until the hiring is validated.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

Prerequisites

Prior to entering employee-specific data, you must define the primary permission list defaults and department tables.

Creating an Employee ID

Creating an employee ID involves:

- Assigning an employee ID to the employee, manually or automatically.
- Defining if the hired employee is a core or an FPS employee.

Select FPS Business Rules on the Name History page to indicate the new employee is an FPS employee and initiate the FPS hire business process.

If Core Business Rules is selected, the system treats the new employee as a core employee.

- Entering the employee personal data supporting documents required for hiring.
- Assigning the employee to a business unit and department for inclusion in the HRMS security system.

Note. The department you enter here should have a company, an establishment, and a location defined.

- Assigning a job code.

The pages and processes used for French Public Sector are the same as those used for all employees. You can find more detailed information about these topics in the *PeopleSoft Human Resources PeopleBook: Administer Workforce*.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

Initializing Employee Status

This step creates a legal relationship between the employee and the organization. Initializing the employee status consists of describing employee status, compensation mode for employee whose statuses do not imply career management, civil service position, and secondment.

This section discusses how to:

- Initialize employee status.
- Create a hiring action.
- Enter civil service position data.

Note. The pages in the Initialize Status FPS component are identical to those in the Add Concurrent Empl Record FPS and Re-Hire Employee FPS components and share the same object names. The difference between these components is that you use one set of pages when initially hiring an employee and the others when adding a concurrent job or rehiring an employee.

Pages Used to Initialize Employee Status

Page Name	Object Name	Navigation	Usage
Status	FPAEESTATUS_PNL1H	Workforce Administration, Increase Workforce, Initialize Status FPS, Status	Initialize employee status and select the compensation mode.
Civ Serv Posit. - Overall Data (civil service position - overall data)	FPAEELEGAL_PNL1H	Workforce Administration, Increase Workforce, Initialize Status FPS, Civ Serv Posit. - Overall Data	Create the hiring action.
Civil Service Position Data	FPAEELEGAL_PNL2H	Workforce Administration, Increase Workforce, Initialize Status FPS, Civil Service Position Data	Enter civil service position data.

Initializing Employee Status

Access the Status page.

The screenshot displays the 'Status' page within a web application. At the top, there are three tabs: 'Status', 'Civ Serv Posit. - Overall Data', and 'Civil Service Position Data'. Below the tabs, the user's name 'Blin,Herve' is shown on the left, and 'ID: SFCA010' and 'Empl Rcd#: 0' are on the right. The main content area is titled 'Status' and includes a search bar with 'Find | View All' and navigation buttons 'First', '1 of 1', and 'Last'. The form contains several fields: 'Effective Date' with a date picker set to 11/20/2002; '*Employee Status Code' with a dropdown set to 'S' and a magnifying glass icon, with 'Trainee' displayed below; a checked checkbox for 'Comp/Salary Grade Table'; 'Access Mode' with a dropdown set to 'C' and a magnifying glass icon, with 'Competition' displayed below; and 'Tenure Date' with an empty date field. At the bottom, a section titled 'Tenure Probation Period' contains 'Length: 12 Months' and 'Probation Date: 11/19/2003'.

Status Page

Select only employees who have existing employee IDs and no existing records.

Employee Status Code

Enter the employee status code. An employee has the same status as long as the employee record is active, except for trainees who change their status at tenure. For a given employee record number, an employee should have only one status (with the exception of trainees who become civil servants); a change of status implies the creation of a new employee record.

Comp/Salary Grade Table
(compensation on salary
grade table)

The system activates and deactivates some fields in the Employee Record FPS component based on this code.

There are two modes of compensation:

- Compensation on salary grade table, which implies the assignment of a job code with a salary grade table and a step.
- Free compensation, where the amount is directly captured in the Compensation field in the Employee Record FPS component.

This check box is available only for employees whose statuses do not imply career management (the Career Data Authorized check box is not selected in the employee status code definition). If you select this check box for those employee status codes, assign a job code with a salary grade table and a step. Otherwise, enter the compensation amount directly in the Compensation field in the Employee Record FPS component.

Access Mode

Select the method by which the employee obtained the position. Values are:

Competition: The employee passed a competitive entry examination.

Recruitment: The employee was interviewed, selected, and recruited.

Tenure Date

Available for Civil Servant statuses only.

Length and Probation Date

If the status is *Trainee*, the system updates the Tenure Probation Period group box. The Length value corresponds to the duration that is defined when setting up the status code on the Status/Population Codes page. The probation date is the effective date, plus the length of the probation period, minus 1 day.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Defining Status and Population Codes, page 10

Creating a Hiring Action

Access the Civ Serv Posit. - Overall Data page.

Status	Civ Serv Posit. - Overall Data	Civil Service Position Data
Blin,Herve		ID: SFGA010 Empl Rcd#: 0
Overall Data Find View All First 1 of 1 Last		
*Effective Date:	11/20/2002	Trainee
*Action:	SFB	Hire
Reason Code:		
Action Status:	☒ Actual ☐ Request	
☒ Edit Individual Order		Individual Order Edit Date:
☒ Edit Collective Order		Collective Order Edit Date:

Civ Serv Posit. - Overall Data page

Action	Enter an action code that corresponds to the hiring action. The actions are defined on the Action Definitions page. The default comes from the FPS Installation Parameters, if you have entered a default hiring action.
Reason Code	Enter a reason for the action. Defined on the Action Reason Table page.
Action Status	Request status is not allowed during the hiring process.
Edit Individual Order and Edit Collective Order	Whether you can select to edit an Individual or Collective Order for each action is defined on the Action Definition page.
	Click to edit the individual order (you can postpone this step until the next stage).

Once you edit the order definitively, you cannot modify the hire data. If you must delete the hire, access Workforce Administration, Job Information, Delete ID FPS.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up Actions, page 16

Entering Civil Service Position Data

Access the Initialize Status - Civil Service Position Data page.

Status Civ Serv Posit - Overall Data **Civil Service Position Data**

Blin, Herve ID: SFCA010 Empl Rcd#: 0

Civil Service Position Data Find | View All First 1 of 1 Last

Effective Date: 11/20/2002 Trainee Actual

Civil Service Position Group: Career Advancement %: %

*Job Indicator: Primary

Secondment

☐ Employee on Secondment

Secondment Type: ☐ Internal Secondment ☐ External Secondment ☒ None

Secondment Information

New Civil Service Position

Activity

Position Expected End Date:

Position Actual End Date:

☐ Return From:

Initialize Status - Civil Service Position Data

To enter civil service position data:

1. Enter the Job Indicator.

Determines if the record is *Primary* or *Secondary*.

2. In the Secondment group box, indicate if the employee is on secondment. Only External Secondment is available for record number 0.
3. Click Secondment Information to enter detailed secondment information.
4. If it is known, enter the expected end date of the position.

Not mandatory for the hiring action. It can be mandatory for break type actions, such as leaves. To make this field mandatory, access the Action Details page.

The system displays the New Civil Service Position data that is associated with the Hire action.

Updating the Employee Record

This section provides an overview of the employee record and discusses how to:

- Enter the hiring action and contract number.

- Enter career classification information.
- Enter compensation and seniority information.
- Enter work location information.
- Enter job information.
- Enter an employee's working time.
- Enter free compensation.

Understanding the Employee Record

The search view displays only employees whose statuses and civil service positions have been initialized but whose employee records are not captured and whose hiring is not yet validated.

During the hiring process, the system uses the employee's last civil service position date as the effective date for the employee record.

Employee Status and Available Pages

Depending on the employee status and compensation mode, the Employee Record FPS component contains five, six, or seven pages. Depending on your setup, the employee's record can be completed by granting seniority bonuses.

Three scenarios are possible:

- Employees whose statuses allow career data.

A status allows career data if the Career Data Authorized check box is selected on the Status/Population Codes page for that status. If the employee's status authorizes career data, the following pages are available: Overall Data, Career - Classification, Career - Comp. Seniority, Assignment - Work Location, Assignment - Job Information, Working Time, and Employee Categorization.

- Employees whose statuses do not authorize career data and who are compensated on salary grade table.

The career pages of this component are not available; you must enter a job code associated with a salary grade table. The following pages are available: Overall Data, Assignment - Work Location, Assignment - Job Information, Working Time, and Employee Categorization.

- Employees whose statuses do not allow career data and with free compensation.

The following pages are available: Overall Data, Assignment - Work Location, Assignment - Job Information, Working Time, Employee Categorization and Compensation.

Hiring Validation

When you save the component, the system validates the hiring process if you have:

- Allocated a step to an employee whose status allows career data.
- Assigned the employee a job code that has Automatic Hiring Validation activated.

The system displays a message indicating that the hiring has been validated. Otherwise, you must access the Validate Hire FPS component.

Employee Record Updates

After hiring employees, you might need to update their records. Access the component that you want to update. The pages are identical to those in the Employee Record FPS component.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Defining Status and Population Codes, page 10

Chapter 4, “Hiring French Public Sector Employees,” Validating the Hiring Process, page 68

Chapter 5, “Updating Employee Records,” page 75

Pages Used to Update the Employee Record

Page Name	Object Name	Navigation	Usage
Overall Data	FPAEEHIRE_PNL	Workforce Administration, Increase Workforce, Employee Record FPS, Overall Data	Enter the hiring action and contract number.
Career - Classification	FPAEECAREER_PNL2H	Workforce Administration, Increase Workforce, Employee Record FPS, Career - Classification	Enter career classification information. Note. Accessible only if the employee's status allows career data.
Career - Comp. Seniority (career - compensation seniority)	FPAEECAREER_PNL3H	Workforce Administration, Increase Workforce, Employee Record FPS, Career - Comp. Seniority	Enter compensation and seniority information. Note. Accessible only if the employee's status allows career data.
Assignment - Work Location	FPAEEPOST_PNL2H	Workforce Administration, Increase Workforce, Employee Record FPS, Assignment - Work Location	Enter work location information.
Assignment - Job Information	FPAEEPOST_PNL3H	Workforce Administration, Increase Workforce, Employee Record FPS, Assignment - Job Information	Enter job information.
Working Time	FPAEEWORKRT_PNL2H	Workforce Administration, Increase Workforce, Employee Record FPS, Working Time	Enter an employee's working time.
Employee Categorization	FPAEEOTHER_PNL2H	Workforce Administration, Increase Workforce, Employee Record FPS, Employee Categorization	Enter other employee information.
Compensation	FPAEESALARY_PNL2H	Workforce Administration, Increase Workforce, Employee Record FPS, Compensation	Enter free compensation information for employees whose statuses do not allow career data and who are not compensated on salary grade table.

Entering the Hiring Action and Contract Number

Access the Overall Data page.

Overall DataCareer - ClassificationCareer - Comp. SeniorityAssignment - Work Location

De Fontenel,LéonID: SFC8001Empl Rcd#: 0

Overall DataFind | View AllFirst1 of 1Last

*Effective Date:01/01/1977

*Action:SFB

Reason Code:

Action Status:☒ Actual☐ Request

Sequence:0

Hire

Civ Serv Posit:Activity

☒ Edit Individual Order☒ Edit Collective Order

Individual Order Edit Date:
Collective Order Edit Date:

Contract #:

Next Contract

Employee Record FPS - Overall Data page

- Action

Enter an action code that corresponds to the hiring action. The actions are defined on the Action Definitions page. The default comes from the FPS Installation Parameters, if you have entered a default hiring action.
- Action Reason Code

Enter a reason for the action. Defined on the Actions Reason Table page.
- Action Status

Request status is not allowed during the hiring process.
- Contract # (contract number)

Enter the contract number if the hiring validation is automatic. If the hiring validation is manual, the contract is created in the Validate Hire FPS component.

Entering Career Classification Information

Access the Employee Record FPS - Career - Classification page.

Overall Data		Career - Classification	Career - Comp. Seniority	Assignment - Work Location	
De Fontenel,Léon		ID:	SFC8001	Empl Rcd#:	0
Classification		Find View All First 1 of 1 Last			
Effective Date:	01/01/1977 /	Trainee	Actual		
Civil Service Position Group:	ACT	Career Advancement %:	100 %		
Budget Info					
Section:	Housing	Article:			
Corps					
Corps:		Category		Corps Change Date:	01/01/1977
Grade/Step					
*Grade:			Grade Entry Date:	01/01/1977	
Access Mode:					
Step:					
Probation Period					
Appointment Date:					
Ten PPd Lgth:	Months	Probation Date:			
☐ Instance Terminated		☐ (Sub)Step Terminated			

Employee Record FPS - Career - Classification page

During the hiring process, you are not required to assign a step to employees having Career access. If you do not assign the step in the Employee Record FPS component, system assigns a step in the Validate Hire FPS component.

The system assigns the step based on:

- Salary grade table setup.
- Any seniority bonus days granted to the employee in the Hiring Seniority Bonus FPS component.

Ten PPd Lgth (tenure probation period length) and **Probation Date** The system displays the length of the tenure probation period and the date when it ends.

The other fields on this page are similar to those on the Career - Classification page in the Increment Step/Promotion FPS component.

See Also

Chapter 5, “Updating Employee Records,” Entering Career Classification Data, page 80

Entering Compensation and Seniority Information

Access the Employee Record FPS - Career - Comp. Seniority page.

Overall Data		Career - Classification		Career - Comp. Seniority		Assignment - Work Location		▶	
De Fontenel,Léon				ID: SFC8001		Empl Rcd#: 0			
Compensation - Seniority Find View All First ◀ 1 of 1 ▶ Last									
Effective Date: 01/01/1977 /				Trainee		Actual			
Civil Service Position Group: ACT				Career Advancement %: 100 %					
Grade/Step									
Grade:									
Step:									
Sal GdTbl/Scale:									
Increased Index:									
☐ Forced Index Incrsd Ind: 									
Component of Pay									
Rate Code:		Annual Rate:		Currency:		Comp Freq:			
Compensation Application Date: 01/01/1977									
Seniority									
Sen to be Carried Over: Y/M/D				Entry Seniority					
Credited Seniority: Y/M/D									
Expected Advancement Date:									
Actual End Dt:									
☐ Instance Terminated ☐ (Sub)Step Terminated									

Employee Record FPS - Career - Comp. Seniority page

The Seniority group box on the Career - Compensation Seniority page does not apply to the hiring process.

The fields on this page are similar to those on the Career - Comp. Seniority page in the Increment Step/Promotion FPS component.

See Also

Chapter 5, “Updating Employee Records,” Viewing Compensation and Seniority Data, page 82

Entering Work Location Information

Access the Employee Record FPS - Assignment - Work Location page.

Overall Data		Career - Classification		Career - Comp. Seniority		Assignment - Work Location		▶	
De Fontenel,Léon				ID: SFC001		Empl Rcd#: 0			
Work Location Find View All First ◀ 1 of 1 ▶ Last									
Effective Date: 01/01/1977 /				Trainee		Actual			
Civil Service Position Group: ACT				Career Advancement %: 100 %					
Position Number:				Position Entry Date:					
*Regulatory Region:		USA		United States					
*Company:									
*Business Unit:		FRA01		France Business Unit					
*Department:		14000		Department Entry Date: 01/01/1977					
*Payroll System:		Other							
Pay Group									
Pay Group:									
☐ Position Management Record									

Employee Record FPS - Assignment - Work Location page

There are two methods for populating this page:

- If you manage part of your system by position, enter a position number.

The system populates the other fields on this page based on the selected position.
Select Override Position Data to modify this data.

- If you do not use positions, enter the company and department.

The department depends on the business unit.

You must also enter the employee's pay group. If you are using PeopleSoft Global Payroll, you must enter additional information; the *PeopleSoft Global Payroll PeopleBook* explains the additional fields.

See Also

[Chapter 5, "Updating Employee Records," Recording Changes of Position, Business Unit, Company, and Department, page 90](#)

PeopleSoft Global Payroll PeopleBook

Entering Job Information

Access the Employee Record FPS - Assignment - Job Information page.

Assignment - Work Location | **Assignment - Job Information** | Working Time | Employee Categorization

De Fontenel, Léon ID: SFC001 Empl Rcd#: 0

Job Information Find | View All First 1 of 1 Last

Effective Date: 01/01/1977 / Trainee Actual

Civil Service Position Group: ACT Career Advancement %: 100 %

*Job Code: 170025 Location Code: Establishment ID: Occupation Code:

Job Entry Date: Install Dt: ☐ Position Management Record

Employee Record FPS - Assignment - Job Information page

To set up compensation for employees whose statuses do not authorize career data and who are compensated on the salary grade table:

1. Enter a job code that is associated with a salary grade table.
The system displays the name of the corresponding salary grade table.
2. Select a step.
Compensation data appears in the compensation group box.
3. (Optional) Select Forced compensation to modify the compensation amount in the Update Compensation FPS component after the hiring validation.
This check box appears for employees that are compensated on a salary grade table and whose statuses do not authorize career data.

See Also

[Chapter 5, “Updating Employee Records,” Modifying Job Data, page 91](#)

Entering an Employee’s Working Time

Access the Employee Record FPS - Working Time page.

Enter the Hours Type, if there is no default value or the default value specified in the FPS installation parameters is incorrect.

The fields on this page are similar to those on the Working Time page in the Update Work Time FPS component.

See Also

[Chapter 5, “Updating Employee Records,” Tracking an Employee’s Working Time, page 97](#)

Entering Free Compensation Information

Access the Compensation page.

If the Compensation/Salary Grade Table check box is not selected when you initialize status, the employee is freely compensated. To create free compensation, enter a rate code on the Compensation page. Default values appear in the Frequency, Currency, and Compensation Rate fields. You can modify these values.

The fields on this page are similar to those on the Compensation - 2 page in the Update Compensation FPS component.

See Also

[Chapter 5, “Updating Employee Records,” Updating Compensation for Employees, page 93](#)

Assigning Seniority Bonuses

During the hire, you can assign a seniority equivalent to define the step that should be assigned to the employee entering the organization. For employees who are in a grade with no step, the Hiring Seniority Bonus FPS component enables you to assign seniority bonuses to the employee.

There are various seniority equivalents, depending on the employee’s competencies, work experience, and career seniority that are acquired in another organization or during military service. At hiring validation, French Public Sector takes these equivalents into account and determines the employee’s step.

This section discusses how to create seniority bonuses.

Pages Used to Assign Seniority Bonuses

Page Name	Object Name	Navigation	Usage
Sen Bonus - Overall Data (seniority bonus - overall data)	FPABONUS_PNL1H	Workforce Administration, Increase Workforce, Hiring Seniority Bonus FPS, Sen Bonus - Overall Data	Enter the seniority bonus code.
Sen Bonus Days (seniority bonus days)	FPABONUS_PNL2H	Workforce Administration, Increase Workforce, Hiring Seniority Bonus FPS, Sen Bonus Days	Enter the seniority equivalent. Note. You can select only employees who have an existing record, but whose hiring is not yet validated.

Entering the Seniority Bonus Code

Access the Sen Bonus - Overall Data page.

Enter the seniority bonus code and the action code.

Note. Seniority headings that are authorized for equivalent calculation are defined in the FPS Installation Parameters component.

Creating Seniority Bonuses

Access the Sen Bonus Days page.

Sen Bonus - Overall Data | **Sen Bonus Days**

Delange, Martine ID: SFGA006 Empl Rcd#: 0

Seniority Bonus Find | View All First 1 of 1 Last

Sen Bonus Code: SF003 Work Experience Seniority + -

Days of Bonus Find | View All First 1 of 1 Last

Effective Date: 03/01/2002 Civil Servant Actual

Civil Service Position Group: ACT **Career Advancement %:** % 100

Bonus Origin

☒ Automatic ☐ Manual

Grade: SFG003 Administrative Empl 2nd Class

Step: 01

Seniority Bonus Days

Years	Months	Days
1	4	0

Bonus End Date:

Sen Bonus Days page

Seniority Bonus Days Enter the number of years, months, and days of seniority the employee should receive for his experience.

Click the Add button to enter additional bonuses.

Validating the Hiring Process

After you've entered the employee's data, you can compare it with the job requirements. After you've reviewed employee and assignment data, you can save the data to validate the hiring process.

Depending on circumstances, this step can be automatic or manual. It is manual if:

- The step has not been assigned when entering employee job data with career.
- The Hiring Automatic Validation setup of the employee's job code (with or without career) is not active.

The FPS comparison between employee data and job requirements takes all competencies and accomplishments into account. In addition to the usual matching competency function, the system groups degrees by subject and then ranks them by level. Degrees on the same level are equivalent.

When matching competencies, if a position requires a degree, the employee must have a degree that pertains to the same subject and with an equal or higher level. If the degree is mandatory, the employee must have the exact degree.

This section discusses how to validate the hire.

Pages Used to Validate the Hiring Process

Page Name	Object Name	Navigation	Usage
Hiring Validation	FPAEERATIFY_PNL1	Workforce Administration, Increase Workforce, Validate Hire FPS, Hiring Validation	Validate the hire. Note. Select only employees who have existing records and whose hiring must be manually validated. Employees whose hiring validation is automatic do not appear in the dialog box.
Hiring Valid - Match Compet (hiring validation - match competencies)	FPAEERATIFY_PNL3	Workforce Administration, Increase Workforce, Validate Hire FPS, Hiring Valid - Match Compet	Compares the employee's competencies to those that are required for the assigned job code.
Hiring Valid - Match Accompl (hiring validation - match accomplishments)	FPAEERATIFY_PNL2	Workforce Administration, Increase Workforce, Validate Hire FPS, Hiring Valid - Match Accompl	Compares the employee's accomplishments to those that are required for the assigned job code.

Validating the Hiring Process

Access the Hiring Validation page.

Hiring Validation		Hiring Valid - Match Compet	Hiring Valid - Match Accomp
Name: Delange,Martine		ID: SFCA006	Empl Rcd#:
Career Data Effective Date: 03/01/2002 Civil Servant Reg Region: United States Job Code: Assistant Grade: Administrative Empl 2nd Class Step: 01		Assignment Data Activity Business Institute - France France Business Unit France Headquarters Paris - Headquarter	
Compensatn Data Sal Gr Tbl Typ: SF1 Civil Servants SalGd Tbl/Scale: SF01 / SF3 Comp Rate Code: Base Salary in Points Compensation Rate: 13161.645000 EUR Compensation Frequency: A		Automatic Step Assignment Seniority to Date: Y/M/D	
Contract #:		Next Contract ☐ Save	

Hiring Validation page

To validate the hiring process:

1. Review the displayed data, including data on the other pages of the component.
2. Click Next Contract to create a contract.
3. Select Save to validate the hire.

If the employee is lacking competencies or accomplishments the system issues a message, but the process continues. Once you save the page, the employee's personal status is *Employee*.

4. For employees in a grade but with no step, the system assigns a step when hiring is validated and displays it in the Automatic Step Assignment group box.

The system accounts for the seniority bonus or the salary grade table entry bonus. If a seniority bonus other than that granted for civil service applies, the salary grade table entry bonus is ignored.

Rehiring an Employee

To rehire an employee, you must recreate the employee's terminated record. Using the Re-Hire Employee FPS component, select the terminated employee and complete the hiring process. You must update the employee record and, in some cases, validate the hire components.

Pages Used to Rehire an Employee

Page Name	Object Name	Navigation	Usage
Status	FPAEESTATUS_PNL1H	Workforce Administration, Increase Workforce, Re-Hire Employee FPS, Status	Enter the employee's status.
Civ Serv Posit. - Overall Data (civil service position - overall data)	FPAEELEGAL_PNL1H	Workforce Administration, Increase Workforce, Re-Hire Employee FPS, Civ Serv Posit. - Overall Data	Enter an action, action reason, and action status.
Civil Service Position Data	FPAEELEGAL_PNL2H	Workforce Administration, Increase Workforce, Re-Hire Employee FPS, Civil Service Position Data	Enter information about this position, including whether it is the employee's primary or secondary job.

See Also

Chapter 4, "Hiring French Public Sector Employees," Initializing Employee Status, page 54

Adding Concurrent Jobs

Use the Add Concurrent Empl Record FPS component to add a concurrent employee record (in case of a dual position or multiple jobs). Enter the employee ID and the new record number, and complete the hiring process.

Pages Used to Add Concurrent Jobs

Page Name	Object Name	Navigation	Usage
Status	FPAEESTATUS_PNL1H	Workforce Administration, Job Information, Add Concurrent Empl Record FPS, Status	Enter the employee's status.
Civ Serv Posit. - Overall Data (civil service position - overall data)	FPAEELEGAL_PNL1H	Workforce Administration, Job Information, Add Concurrent Empl Record FPS, Civ Serv Posit. - Overall Data	Enter an action, action reason, and action status.
Civil Service Position Data	FPAEELEGAL_PNL2H	Workforce Administration, Job Information, Add Concurrent Empl Record FPS, Civil Service Position Data	Enter information about this position, including whether it is the employee's primary or secondary job.
Secondment Information	FPAEELEGAL_SEC	ClickSecondment Information on the Civil Service Position Data page.	Enter secondment information for this position, including the business unit, the department (for security purposes), and the job code associated with the new record.

See Also

Chapter 4, “Hiring French Public Sector Employees,” Initializing Employee Status, page 54

Chapter 15, “Managing Secondment,” page 159

Hiring an Applicant

If you use the Recruit Workforce business process, you can hire applicants directly. The prehiring option is available in the Recruiting menu.

To hire an applicant:

- Perform the hiring procedure using the Hire component in the Recruiting, Hire Applicants menu.
- Initialize the employee status.
- Enter the employee record.
- Track supporting documents.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Hiring Applicants”

Chapter 5, “Updating Employee Records,” Tracking Supporting Documents, page 102

Deleting an Employee Hiring

Deleting an employee hire requires the Delete FP Hire process (FPA250), an SQR program.

Page Used to Delete an Employee Hiring

Page Name	Object Name	Navigation	Usage
FPS Delete Id	RUNCTL_FPA250	Workforce Administration, Job Information, Delete ID FPS	Delete an employee hiring.

Deleting an Employee ID

Access the FPS Delete ID page.

The Delete FP Hire (FPA250) process deletes an employee ID. Deleting an employee ID implies deleting all job records that are associated with the employee. Even after the employee data is deleted, the following tables retain the employee’s records:

- Personal Data
- Status

- Civil Service Position
- Career
- Assignment
- Compensation
- Work Time
- Employee Categorization

You cannot reuse a deleted employee ID.

CHAPTER 5

Updating Employee Records

This chapter provides an overview of updating employee data and discusses how to:

- Enter an action.
- Edit individual or collective orders.
- Delete an action.
- Manage personal data.
- Manage career data.
- Manage sanctions and demotions.
- Manage civil service positions.
- Manage employee status.
- Manage assignments.
- Manage compensation data.
- Manage employee premiums.
- Manage work time.
- Managing employee categorization.
- Manage seniority bonuses.
- Manage absences.
- Track supporting documents.
- Review employee data.

Understanding Employee Data Updating

After hiring is validated, the major activity in PeopleSoft Human Resources is updating employee records, using the components on the Workforce Administration menu. Most pages in these components are identical to those that are used in the hiring process as part of the Employee Record FPS component. Unlike the hiring process, you can access different parts of the employee record separately.

You make a transaction update by inserting, deleting, or modifying an event or data in an employee's record. Each event or action is recorded in a specific component, with its own effective date. This enables you to have a complete history and simulate or plan future events.

You can also update records by collective process. These processes can apply to all employees or to a specific employee category. The processes can be run automatically, at a predetermined time, or manually, by request. You start collective processes from the Workforce Administration, Collective Processes menu.

Many components that are used to update employee records contain the Overall Data page. This is a generic page that you use to enter and process actions, edit individual and collective orders, and delete actions.

Entering an Action

Available actions depend on:

- The user's role.

By selecting Action Authorization Management on the FPS Installation Parameters 1 page, actions are limited to the action groups that are available to the user. You define the action group/user relationship on the Action Groups and Action Authorization pages.

- The component.

Only actions that are authorized for the component can be selected. You authorize Actions on the Action Details page.

- The employee's status.

Only actions that are authorized for the employee's status can be selected. This relationship is established on the Authorized Actions/Status page.

- The employee's civil service position.

The system controls whether the employee's civil service position permits the action on the effective date. If the action is not authorized, a message informs the user, and the user modifies the action. The relationship between action and civil service position originates on the CS Position/Actions page.

To enter an action:

1. Access the Overall Data page for the desired component.
2. Enter the effective date and sequence number for the action.

The civil service position does not determine the effective sequence.

3. Select the action.
4. Select the action status, either Actual or Request.

See Also

Chapter 14, "Managing Requests," page 153

Editing Individual or Collective Orders

This section describes how to edit an order.

Pages Used to Edit Individual or Collective Orders

Page Name	Object Name	Navigation	Usage
Individual Orders	RUNCTL_FPA110J	Workforce Administration, Workforce Reports, Individual Orders Edits FPS	Run the Edit Individual Orders report (FPA110). This report edits all individual orders for a period, status and action code.
Collective Orders	RUNCTL_FPA110C	Workforce Administration, Workforce Reports, Collective Orders FPS	Run the Edit Collective Orders report (FPA110). This report edits all collective orders for a period, status and action code.
Collective Order Nbr Update (collective order number update)	RUNCTL_FPA115	Workforce Administration, Workforce Reports, Collective Orders Updates FPS	Run the Collective Order Number Updating report (FPA115). This report attributes a number to collective orders.

Editing an Order

When you edit an order, you generate 1 to 5 documents that you have previously defined for the action.

To edit an order:

1. Access the Overall Data page in the desired component.
2. Select Edit Individual Order or Edit Collective Order. The system assigns an order number.
3. Click Send to Printer to edit the order.
4. Select whether this is the final edit.

If you select *yes*, the Edit Date appears. The edited order list depends on the employee's status and action that you ordered. The system produces a Crystal report for each document.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Defining Individual and Collective Orders, page 26

Deleting an Action

To delete an action:

- Select Order Abrogation for the orders that have been edited.

Abrogated documents are edited, and the abrogation date is displayed. Once the order abrogation is edited, the move is deleted and the data is stored.

- Click the Delete button for actions without orders or with incomplete orders.

The move is deleted in the employee record and the data is stored in the delete moves table.

Managing Personal Data

Use the Update Personal Information component to modify the employee's address and marital status.

See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Hiring Your Workforce," Hiring an Employee.

Managing Career Data

The Career component enables you to manage actions that affect employees' careers, mainly grades and step successions such as advancement, promotion, and demotion. This is one of French Public Sector's principal business processes.

Several collective processes are associated with Career data:

- Seniority calculation.
- Automatic step increment date calculation.
- Probation period management.
- Reclassification process.
- Retroactivity process.

This section discusses how to:

- Enter an action that adds or modifies employee career data.
- Enter career classification data.
- View compensation and seniority data.
- Record seniority earned in another organization.
- Save career data.
- Delete career data.
- Enter and view an employee's previous duties, seniority, and employers.

Pages Used to Manage Career Data

Page Name	Object Name	Navigation	Usage
Career - Overall Data	FPAEECAREER_PNL1	Workforce Administration, Job Information, Increment Step/Promotion FPS, Career - Overall Data	Enter an action that adds or modifies employee career data. Note. In the dialog box that appears, you can access only employees whose statuses allow career management.
Career - Classification	FPAEECAREER_PNL2	Workforce Administration, Job Information, Increment Step/Promotion FPS, Career - Classification	Enter career classification data.
Career - Comp. Seniority (career – compensation seniority)	FPAEECAREER_PNL3	Workforce Administration, Job Information, Increment Step/Promotion FPS, Career - Comp. SeniorityCareer - Compensation Seniority	View compensation and seniority data.
Entry Seniority Catg/Body/Grd (entry seniority category, body, and grade)	FPAEECAREER_SEC	ClickEntry Seniority on the Career - Compensation Seniority page.	Record seniority that has been earned in another organization or during military service.
Delete Career Data FPS - Career - Overall Data	FPAEECAREER_PNL1D	Workforce Administration, Job Information, Delete Career Data FPS, Career - Overall Data	View and delete previously recorded career data.
Delete Career Data FPS - Career - Classification	FPAEECAREER_PNL2D	Workforce Administration, Job Information, Delete Career Data FPS, Career - Classification	View and delete previously recorded career data.
Delete Career Data FPS - Career - Comp. Seniority	FPAEECAREER_PNL3D	Workforce Administration, Job Information, Delete Career Data FPS, Career - Comp. Seniority	View and delete previously recorded career data.
Prior Career	FPAEEHISTCARE_PNL	Workforce Administration, Personal Information, Biographical, Prior Career History FPS	Enter and view an employee's previous duties, seniority, and employers.
Employee Career/Action	RUNCTL_FPACRYSTAL2	Workforce Administration, Job Information, Reports, Employee Career/Action FPS	Run the Employee Career/Action report (FPAEE_CA) that lists employee career data.

Entering an Action that Adds or Modifies Employee Career Data

Access the Career - Overall Data page.

Career - Overall Data		Career - Classification		Career - Comp. Seniority	
CLAUTERET, Stacy		ID:	SFCS004	Empl Rcd#:	0
Overall Data Find View All First 1 of 1 Last					
*Effective Date:	01/01/1991	Sequence:	0	Civil Servant	Civ Serv Posit: Activity + -
*Action:	SFB	Hire			
Reason Code:					
Action Status:	☒ Actual ☐ Request				
☒ Edit Individual Order		Individual Order Edit Date:			
☒ Edit Collective Order		Collective Order Edit Date:			

Career - Overall Data page

Sequence

The sequence number enables you to enter several actions on the same date and in the same part of the employee record.

Action Status

Values are *Actual* (the default) and *Request*. Select *Request* to submit the action for approval. When the system controls budget headcount, some Career, Civil Service Position and Work Time changes must be requested systematically.

See Also

[Chapter 14, “Managing Requests,” page 153](#)

[Chapter 5, “Updating Employee Records,” Understanding Employee Data Updating, page 75](#)

Entering Career Classification Data

Access the Career - Classification page.

Career - Overall Data		Career - Classification		Career - Comp. Seniority	
CLAUTERET, Stacy		ID:	SFCS004	Empl Rcd#:	0
Classification Find View All First 1 of 1 Last					
Effective Date:	01/01/1991 /	Civil Servant	Actual		
Civil Service Position Group:	ACT	Career Advancement %:	100 %		
Budget Info					
Section:	Housing	Article:	Dec Serv		
Corps					
Corps:	SFC004	Tec of Lab	Category	B	Corps Change Date: 01/01/1991
Grade/Step					
*Grade:	SFG014	Civil Engineer	Grade Entry Date:	01/01/1991	
Access Mode:					
Step:	01	Expected Advancement Date:			
Probation Period					
Appointment Date:					
☐ Trainee ☐ In progress ☐ Validated ☐ Rejected ☐ None Expected End Date:					
☐ Instance Terminated			☐ (Sub)Step Terminated		

Career - Classification page

Section and Article

This information is required if your system controls budget headcount.

Corps

The system displays the corps name. When the corps changes, the entry date for the new corps is updated with the effective date.

Grade/Step

The action that you entered on the Career - Overall Data page determines whether or not you can modify the Grade and Step or Scale-letter/Sub-step fields in this group box. For grade promotion, the grades that are prompted are authorized by the employee's status.

Grade

Only valid grades for the employee's status are available. The corps and category that are associated with the grade appear automatically.

Access Mode

You can access this field only for grade promotions.

Step

When you update the employee record, entering the step is mandatory. Only steps belonging to the salary grade table are available.

Expected Advancement Date

Display only. The Advancement Date Calculation process updates the advancement date. If a sanction occurs, you can modify the expected advancement date in the Sanction/Demotion component.

Probation Period**Trainee**

This field is available only when you select a grade promotion implying a corps change for an employee who is a civil servant. Select to indicate a promotion probation period is required.

Expected End Date

System displayed. This is the effective date, plus the promotion probation period length, minus 1 day.

The exact end date accounts for part-time and civil service position breaks. The Probation Period End Date Calculation process produces the exact end date.

While the employee is in a probation period, you cannot record grade promotion or step increment actions.

Ten PPd Lgth (tenure probation period length)

If the employee is a trainee, the system displays the trainee's tenure probation period length in grade.

Probation Date

Available for trainees only. Calculated by the tenure date calculation process. It accounts for possible statutory breaks during probation period length and part-time.

See Also

[Chapter 10, "Processing Career Advancement," page 131](#)

[Chapter 8, "Managing the Promotion Probation Period," page 121](#)

[Chapter 7, "Processing Trainee Tenure," page 113](#)

Viewing Compensation and Seniority Data

Access the Career - Comp. Seniority page.

Career - Overall Data		Career - Classification		Career - Comp. Seniority	
CLAUTERET, Stacy		ID:	SFCS004	Empl Rcd#:	0
Compensation - Seniority				Find View All	First 1 of 1 Last
Effective Date:	01/01/1991 /	Civil Servant	Actual		
Civil Service Position Group:	ACT	Career Advancement %:	100 %		
Grade/Step					
Grade:	SFG014 Civil Engineer	Grade Premiums			
Step:	01				
Sal GdTbl/Scale:	Off Scale				
Increased Index:	580				
☐ Forced Index	Incrsd Ind:				
Component of Pay					
Rate Code:	KF006	Annual Rate:	193830.200	Currency:	FRF
Compensation Application Date:	01/01/1991	Comp Freq:	Annual		
Seniority					
Sen to be Carried Over:	Y/M/D	Entry Seniority			
Credited Seniority:	Y/M/D				
Expected Advancement Date:					
Actual End Dt:					
☐ Instance Terminated		☐ (Sub)Step Terminated			

Career - Comp. Seniority page

Grade Premiums	Click to access the Grade Premiums page of the Grades component.
Grade and Step	Depending on the grade and step that you entered on the Career - Classification page, the system displays a summary page of the employee classification: corps, grade, Salary Grade table, and scale.
Forced Index and Incrsd Ind (increased index)	Select to modify the index that corresponds to the employee's grade and step in the Salary Grade table. Enter the new index value in the Incrsd Ind field, which becomes available for entry.
Component of Pay	
Annual Rate, Currency, and Comp Freq (compensation frequency)	You can convert the compensation rate to another currency by clicking the right mouse button. The system uses the triangulation method. You can also convert the compensation rate to another frequency. The system does not record the modification.
Compensation Application Date	Displays the effective date. You can modify this date if the effective date comes before the application date.
Seniority	
Sen to be Carried Over (seniority to be carried over) and Credited Seniority	Both values are calculated during the collective seniority process.
Entry Seniority	Click to record seniority that is acquired in another organization or during military service. You can enter seniority in category, corps, and grade.
Instance Terminated and (Sub)Step Terminated	These check boxes are cleared for a new row. French Public Sector uses both indicators in the seniority calculation collective process.

Recording Entry Seniority Earned in Another Organization

Access the Entry Seniority Catg/Body/Grd page.

Entry Seniority Catg/Body/Grd

	Years	Months	Days
Catgy Entry Seniority:			
Corps Entry Seniority:			
Grade Entry Seniority:			

OK

Cancel

Entry Seniority Catg/Body/Grd page

You can record seniority that was earned in another organization or during military service. Enter the category, corps, and grade entry seniority only if they imply a category, corps, or grade change.

Note. A change of category implies a change of corps. A change of corps implies a change of grade.

When capturing each seniority at entry, the system checks to be sure that:

- Total seniority at entry in all corps in a category is lower than or equal to the seniority at entry in the category.
- Total seniority at entry in all grades in a corps is lower than or equal to the seniority at entry in the corps.

Seniority entered on this page does not add to or substitute for credited seniority in step. Thus, they are not considered in the advancement process. However, they are integrated into the criteria considered when listing promotable employees.

See Also

Chapter 9, “Calculating Seniority and Length of Service,” page 125

Saving Career Data

When saving a new action, the system:

- Overrides the Expected Advancement Date field from the previous row with the actual end date provided by the new action.

The end date equals the next move effective date, minus 1 day.

- Selects the Instance Terminated check box in the prior row.

A move is terminated as soon as it is followed by another move.

- Selects the Step Terminated check box in the previous row unless the last move that was inserted is an action that authorizes Previous Instance Seniority Carry Over.

Seniority carryover is defined in the Seniority Carry Over field in the Actions component (Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Actions).

Deleting Career Data

You can delete an action that is specifically recorded in the Career component. When you do so, the system checks the consistency. For instance, when you delete a step increment action, French Public Sector checks to be sure that a seniority bonus that is associated with the step has not been granted. If it has, a message is issued. You must delete the seniority bonus before deleting the step increment.

See Also

Chapter 5, “Updating Employee Records,” Deleting an Action, page 77

Entering and Viewing an Employee’s Previous Duties, Seniority, And Employers

Access the Prior Career page.

Prior Career

CLAUTERET, Stacy
ID: SFC8004

Prior Career

Find | View All First 1 of 1 Last

*Effective Date: 11/20/2002

Business Unit: GBIBU Global Business Institute BU

Job Code:

Grade:

☐ Employee on Secondment
☐ Deductions for Pension

Seniority in Grade: / /

(Sub)Step Actual End Date:

Occupation Code:

Corps:

Start Date:

Employer:

Status: ☐

Step:

Career Seniority in Scale: / /

Prior Career page

To track an employee's career, enter the career data. This page is for your records only. No data is required.

Managing Sanctions and Demotions

The Sanction/Demotion component enables you to sanction or demote employees. A sanction freezes employee advancement. A demotion moves an employee to a lower step.

These actions affect the employee's Career table and seniority calculation. You can view these actions in the Career component. However, you cannot enter a sanction or demotion in that component.

This section discusses how to:

- Enter a sanction or demotion action.
- Enter the sanction or demotion details.

Pages Used to Manage Sanctions and Demotions

Page Name	Object Name	Navigation	Usage
Sanct/Demotion - Overall Data (sanction/demotion - overall data)	FPAEESANCTION_PNL1	Workforce Administration, Job Information, Freeze Advancement/Demotion FPS, Sanct/Demotion - Overall Data	Enter a sanction or demotion action.
Sanction/Demotion	FPAEESANCTION_PNL2	Workforce Administration, Job Information, Freeze Advancement/Demotion FPS, Sanction/Demotion	Enter the sanction or demotion details.

Entering a Sanction or Demotion

Access the Sanct/Demotion - Overall Data page.

To enter a sanction or demotion:

1. Add a new row.
2. Select the Action.

The available actions include only sanction and demotion actions. You define whether an action is a sanction or demotion action when setting up the action on the Action Details page.

3. Enter the action status.
4. Select whether to edit an individual or collective order for this action.

Enter Sanction or Demotion Details

Access the Sanction/Demotion page.

Sanct/Demotion - Overall Data **Sanction/Demotion**

Gilbert, Marceau **ID:** SFC8002 **Empl Rcd#:** 0

Sanction - Demotion Find | View All First 1 of 2 Last

Effective Date: 11/20/2002 / Trainee Request + -

Civil Service Position Group: ACT **Career Advancement %:** 100 %

*Grade: SFG014 Civil Engineer ☒ **Sanction**
☐ **Demotion**

Step: 01

Appointment Date: 11/18/2002 [BT]

☐ **Modify Advancement Date** **Expected Advancement Date:**

☐ **Instance Terminated** **(Sub)Step Actual End Date:**

☐ **(Sub)Step Terminated**

Sanction/Demotion page

If you entered a sanction action code:

- The system selects the Sanction check box to indicate the action is a sanction.
- Enter an appointment date.
- Select Modify Advancement Date to change the employee's advancement date and enter the new advancement date in Expected Advancement Date.

If you entered a demotion action code:

- The system selects the Demotion check box to indicate the action is a demotion.
- Enter an appointment date.

- Enter the new step.

After you have recorded a sanction or a demotion, you can go to the employee's Career component and determine that the sanction is stored as an action (you cannot modify this action in the Career component).

When you save the next action in the Career component, French Public Sector asks if the selected action terminates the sanction or demotion. Until you answer yes, the system displays this message each time you save a new element in the Career component.

Managing Civil Service Positions

With this part of the employee record, you can track employees' civil service positions. Each action that is entered in the Chg Civil Service Position FPS component creates a new civil service position that will be the employee's civil service position from the move's effective date onward. The employee keeps this civil service position until a new move modifies it.

For each new civil service position, French Public Sector verifies that all civil service positions match the moves (past and future) that are selected in the employee's record. If there are incompatibilities, you cannot insert a move in the Chg Civil Service Position FPS component.

This section discusses how to enter civil service position data.

Pages Used to Manage Civil Service Position

Page Name	Object Name	Navigation	Usage
Civ Serv Posit. - Overall Data (civil service position - overall data)	FPAEELEGAL_PNL1	Workforce Administration, Job Information, Chg Civil Service Position FPS, Civ Serv Posit. - Overall Data	Enter an action that adds or modifies employee civil service position.
Civil Service Position Data	FPAEELEGAL_PNL2	Workforce Administration, Job Information, Chg Civil Service Position FPS, Civil Service Position	Enter civil service position data.
Secondment Information	FPAEELEGAL_SEC	Click Secondment Information on the Civil Service Position Data page.	Enter secondment data.
Statutory Position/Employee	RUNCTL_FPACRYSTAL2	Workforce Administration, Job Information, Reports, CS Position/Employee FPS	Run the CS Position/Employee report (FPAEE_PO) that lists employee civil service position data

Entering Civil Service Position Data

Access the Civil Service Position Data page.

Civ Serv Posit - Overall Data

Civil Service Position Data

Gilbert,Marceau
ID: SFC8002
Empl Rcd#: 0

Civil Service Position Data

Find | View All First 1 of 1 Last

Effective Date: 01/01/1981/

Trainee

S

Actual

+

-

Civil Service Position Group: ACT

Career Advancement %: 100 %

*Job Indicator: Primary

Secondment

☐ Employee on Secondment

Secondment Type:
☐ Internal Secondment
☐ External Secondment
☒ None

Secondment Information

New Civil Service Position

Activity

Civil Service Position

Position Expected End Date:

Position Actual End Date:

☐ Return
From:

Links

Career Data

Assignment Data

Working Time Data

Transfer=>Assignment

Civil Service Position Data page

To enter civil service position data:

1. View and modify secondment data, if needed, by clicking Secondment Information.
2. Enter the civil service position expected end date.

The expected end date is mandatory if the action requires a date of return.

If the previous action has created a new civil service position requiring a Return, the new action creates the return. When editing orders, an order is automatically edited to notify the return.

If the civil service position setup indicates that the new position requires full-time status, French Public Sector verifies this. If the employee works part-time, you cannot save the data. Click Civil Service Position to view setup information for the civil service position.

When a civil service position implies that the position is to be vacated, a message indicates that status. When you save the page, the Transfer Assignment button enables you to access the employee's assignment data and manually modify the position.

Managing Employee Status

This section discusses how to view and change an employee's status.

Note. If you are changing an employee's status from Without Career to With Career, PeopleSoft recommends that you create a new employee record.

Page Used to Update Employee Status

Page Name	Object Name	Navigation	Usage
Status	FPAEESTATUS_PNL1	Workforce Administration, Job Information, Update Status FPS	View and change an employee's status.

Viewing and Changing an Employee's Status

Access the Status page.

The screenshot displays the 'Status' page for employee Grallier, Michelle. At the top, the employee's name, ID (SFC8005), and Empl Rcd# (0) are shown. Below this is a 'Status' section with a search bar and navigation links (Find, View All, First, 1 of 1, Last). The main form contains several fields: 'Effective Date' (01/01/1990), '*Employee Status Code' (F, Civil Servant), 'Access Mode' (C, Competition), and 'Tenure Date' (11/29/2002). A checkbox for 'Comp/Salary Grade Table' is checked. At the bottom, a 'Tenure Probation Period' section is visible, containing 'Length' (Months) and 'Probation Date' fields.

Status page

The availability of many fields on this page is dependent on employee status. Enter data in the fields as needed.

Employee Status Code Enter the new employee status.

Access Mode Select how the employee reached the new status, through *Competition* or *Recruitment*.

Comp/Salary Grade Table (compensation/salary grade table) This check box is available for entry only for employees whose statuses do not imply career management.

Tenure Date This field is available only for Civil Servant and Trainee statuses.

Tenure Probation Period

This group box is available for entry if the status is *Trainee* before tenure.

Length	The system displays the tenure probation period length in the trainee's grade for trainees.
Probation Date	This is the probation period end date that is calculated by the process. It accounts for possible statutory breaks during probation period length and part-time work.

See Also

Chapter 7, "Processing Trainee Tenure," page 113

Chapter 4, "Hiring French Public Sector Employees," page 53

Managing Assignments

This part of the employee record enables you to update employees' assignment and job data. It also determines base compensation for employees who are in the Salary Grade Table according to their job codes and steps.

This section discusses how to:

- Record changes of position, business unit, company and department.
- Modify job data.

Pages Used to Manage Assignments

Page Name	Object Name	Navigation	Usage
Assignment - Overall Data	FPAEEPOST_PNL1	Workforce Administration, Job Information, Update Assignment FPS, Assignment - Overall Data	Add a new assignment.
Assignment - Work Location	FPAEEPOST_PNL2	Workforce Administration, Job Information, Update Assignment FPS, Assignment - Work Location	Record changes of position, business unit, company and department.
Assignment - Job Information	FPAEEPOST_PNL3	Workforce Administration, Job Information, Update Assignment FPS, Assignment - Job Information	View and modify job data.

Recording Changes of Position, Business Unit, Company, and Department

Access the Assignment - Work Location page.

Assignment - Overall Data		Assignment - Work Location		Assignment - Job Information	
Grallier,Michelle		ID:	SFCS005	Empl Rcd#:	0
Work Location Find View All First ◀ 1 of 1 ▶ Last					
Effective Date:	01/01/1990 /	Civil Servant	Actual + -		
Civil Service Position Group:	ACT	Career Advancement %:	100 %		
Position Number:	🔍	Position Entry Date:			
*Regulatory Region:	FRA 🔍	France			
*Company:	KF1 🔍	Business Institute - France			
*Business Unit:	FRA01 🔍	France Business Unit			
*Department:	11000 🔍	Information System/Technology	Department Entry Date: 01/01/1990		
*Payroll System:	Other ▾				
Pay Group					
Pay Group:	🔍				
☐ Position Management Record					

Assignment - Work Location page

To record changes:

- If you manage part of your system by position, enter a position number in the Position Number field.

The system populates the following fields: Regulatory Region, Company, Business Unit, Department, Payroll System, and Pay Group. Select **Override Position Data** to modify these values if needed.

Warning! In case of partial position management, modifying position data on the Organizational Development, Position Management menu can affect the civil servant assigned to that position on this page.

- If you do not manage your system by position, enter the Business Unit and Department.

You must also enter the employee's pay group. If you are using PeopleSoft Global Payroll, you must enter additional information; the *PeopleSoft Global Payroll PeopleBook* explains the additional fields.

See Also

PeopleSoft Global Payroll PeopleBook

Modifying Job Data

Access the Assignment - Job Information page.

Assignment - Overall Data		Assignment - Work Location		Assignment - Job Information	
PONET, Eric		ID:	SFCW02	Empl Rcd#:	0
Job Information		Find View All First 1 of 1 Last			
Effective Date:	01/01/1980 /	Contract Emp. without Career		Actual	
Civil Service Position Group:	ACT	Career Advancement %:	100 %		
* Job Code:	250000	Chief Executive Officer		Job Code Premiums	Job Entry Date:
Location Code:	KFPA01	Paris		Install Dt:	
	KF001	Paris - Headquarter			
Establishment ID:				☐ Position Management Record	
Occupation Code:					
Classification					
Salary Grade Table:	Contract Employees	Salary Grd Tbl 13			
Step:	02				
Component of Pay					
Rate Code:	NAANNL	Default NA Annual		☐ Forced Salary	
Reference:	11			Applic Dt:	01/01/1980
Comp Rate:	276000.000000	Currency:	FRF	Comp Freq:	Annual

Assignment - Job Information page

- Job Code Premiums** Click to access the Job Code Premiums component.
- Step** Enter the step for employee on the Salary Grade Table.
- Forced Salary** Select to be able to adjust the component of pay data on the Compensation - 2 page.
- Component of Pay** Displays compensation elements.

The Classification and Component of Pay group boxes are available only for employees without careers who are compensated on salary grade table.

Managing Compensation Data

The compensation pages affect only employees without careers. The pages distinguish between employees in salary grade tables and employees with free compensation.

The base compensation of employees without career and in salary grade tables are defined automatically by their job codes and steps. You manage this data in the Update Assignment FPS component. In the Update Compensation FPS component, you can modify these previously defined base compensations only by forcing indexes or amounts.

For employees without careers and with free compensation, you enter the compensation amounts directly.

This section provides an overview of the pages used for compensation management and discusses how to update compensation for employees.

Understanding the Pages Used for Compensation Management

In French Public Sector, employee compensation is managed on different pages, depending on status and compensation mode:

Status	Pages	Managed Data
Employee With Career	Career - Compensation Seniority	Compensation + Forced Index
Employee Without Career - in Salary Grade table	Assignment - Job Information, Compensation - 2	Base Compensation, Forced Salary
Employee Without Career - outside Salary Grade table	Compensation - 2	Compensation
All statuses	Employee Premiums	Financial bonuses

Pages Used to Update Compensation Data

Page Name	Object Name	Navigation	Usage
Compensation - 1	FPAEESALARY_PNL1	Workforce Administration, Job Information, Update Compensation FPS, Compensation - 1	Enter an action that adds or modifies employee compensation data.
Compensation - 2	FPAEESALARY_PNL2	Workforce Administration, Job Information, Update Compensation FPS, Compensation - 2	Update compensation for employees.

Updating Compensation for Employees

Access the Compensation - 2 page.

Compensation - 1		Compensation - 2	
PONET, Eric		ID: SFCW02	Empl Rcd#: 0
Compensation Data		Find View All First 1 of 2 Last	
Effective Date: 11/20/2002 /		Contract Emp. without Career Actual	
Civil Service Position Group: ACT		Career Advancement %: 100 %	
Classification			
Job Code:	250000	Chief Executive Officer	Sal Gd Tbl:
Step:	02		
Component of Pay			
Rate Code:			
Increased Index:			
Comp Rate:		Currency:	Comp Freq: Monthly
☒ No Modification ☐ Modify Compensation ☐ Modify Index			

Compensation - 2 page

Updating Compensation for Employees in Salary Grade Tables

To update compensation for employees in salary grade tables:

1. Select Modify Index or Modify Compensation.

These options are available only if Forced Salary is selected (for the specified period) on the Assignment - Job Information page.

2. Adjust the Component of Pay data.

Updating Compensation for Employees With Free Compensation

Only the Component of Pay group box appears for employees with free compensation.

To update compensation for employees with free compensation:

1. Enter the Rate Code.
2. The system populates Frequency, Currency, and Comp Rate:
Modify these values as needed.

Managing Employee Premiums

Individual premiums can be assigned to employees. They can be expressed as a number of points, a flat amount, or a percentage. Individual premiums are tracked the same way for contract workers and civil servants.

This section discusses how to update employee premiums.

Pages Used to Manage Employee Premiums

Page Name	Object Name	Navigation	Usage
Employee Record - Overall Data	FPAEEMP premium_PNL1	Workforce Administration, Job Information, Grant Premiums FPS, Overall Data	Enter an action that adds or modifies employee premium data.
Premiums	FPAEEMP premium_PNL2	Workforce Administration, Job Information, Grant Premiums FPS, Premiums	Update employee premium data.

Updating Employee Premiums

Access the Premiums page.

Premiums page

Rate Code

Enter the rate code for the premium.

If the rate code is:

- An amount:
 - Points, Percent, and Rate Code Group are hidden.
 - Comp Rate, Currency, and Comp Freq are available.
- A percentage:
 - Rate Code, Comp Rate, Points, Currency, and Comp Freq are hidden.
 - Percent and Rate Code Group are available.
- Valued in points:
 - Comp Rate, Percent, and Rate Code Group are hidden.
 - Points, Currency, and Comp Freq are available.

Currency

Optional.

Comp Freq (compensation frequency)	Optional.
Pro-Ration Row Type	Select whether the premium is main or secondary compensation.
Career Premium	Indicate whether the premium is granted for the current step or grade. Values are: <i>Grade/Step Sensitive:</i> The premium is deactivated when a change in step occurs. <i>Grade sensitive:</i> The premium is deactivated when a change in grade occurs. <i>None:</i> The premium is granted regardless of career path. This field is unavailable for entry if the employee is not a civil servant and therefore does not have grade/step career data.
Premium Status	Values are: <i>Active:</i> The premium is active. <i>On Hold:</i> The premium is not aligned with the grade or grade and step data. <i>Reactivated:</i> The premium is reactivated.

Linking the Career Premium and Premium Status Fields

The actions (rows) in the career record can be separated into two groups: open occurrences and closed occurrences.

- Open occurrences

Updates, deletions, or additions of open occurrences initiate online updates to the Premium Status field according to the following scheme.

Career Change	Career Premium	Premium Status
Neither grade nor step changes.	Any option.	No change.
Step or grade changes.	None.	No change.
Step changes.	Grade- and step-sensitive.	On Hold if the step change effective date precedes the premium effective date.
Step changes.	Grade-sensitive.	No change.
Grade changes.	Step-sensitive.	On Hold if the grade change effective date precedes the premium effective date.
Grade changes.	Grade-sensitive.	On Hold if the grade change effective date precedes the premium effective date.

- Closed occurrences

The retroactivity batch process manages the impact of updates, deletions, or additions of closed occurrences.

You must manually initiate the existing retroactivity process by updating Career data. After the career data has been rebuilt, following any career changes, the process scans the premiums for the employees with career changes and assesses whether the premiums agree with the grade and step data in the Career Table. If the premiums are not valid, they are flagged as On Hold.

See Also

Chapter 5, “Updating Employee Records,” Saving Career Data, page 84

Chapter 11, “Running the Retroactivity Process,” page 137

Managing Work Time

This section discusses how to track an employee’s work time.

Pages Used to Manage Work Time

Page Name	Object Name	Navigation	Usage
Working Time - Overall Data	FPAEEWORKRT_PNL1	Workforce Administration, Job Information, Update Work Time FPS, Working Time - Overall Data	Enter an action that affects the employee’s working time.
Working Time	FPAEEWORKRT_PNL2	Workforce Administration, Job Information, Update Work Time FPS, Working Time	Track an employee’s working time.

Tracking an Employee’s Working Time

Access the Working Time page.

Working Time - Overall Data		Working Time	
KLIM,Olivier		ID:	SFCW04
		Empl Rcd#:	0
Working Time Find View All First 1 of 1 Last			
Effective Date: 01/01/1980 /		Contract Emp. without Career	
Civil Service Position Group: ACT		Career Advancement %: 100 %	
*Full/Part Time:		Full-Time	
Working Time Percentage:		100 %	
Position Actual End Date:			
Position Expected End Date:			
*Hours Type:		STA Standard Hours	
Standard Hours:			
Standard Work Period:			

Working Time page

Full//Part Time	Indicate if the employee is full-time or part-time.
Working Time Percentage	Select a working-time percentage for part-time employees.
Position Actual End Date	The next row's effective date, minus 1 day.
Position Expected End Date	This field is either required or optional, depending on the action that you have set up.
Hours Type	Enter the type of hours; for example, <i>STA</i> (standard hours).
Standard Hours	Select the number of hours that the employee works per standard work period.
Standard Work Period	Select the length of the standard work period, such as a weekly.

Managing Employee Categorization

The Employee Categorization component holds employee data that is not specific to French Public Sector.

Pages Used to Manage Employee Categorization

Page Name	Object Name	Navigation	Usage
Employee Categorization 1	FPAEEOTHER_PNL1	Workforce Administration, Job Information, Update Categorization FPS, Employee Categ - Overall Data	View employee data.
Employee Categorization	FPAEEOTHER_PNL2	Workforce Administration, Job Information, Update Categorization FPS, Employee Categorization	Maintain employee data that is not specific to French Public Sector.

Managing Seniority Bonuses

This section provides an overview of seniority bonus management and discusses how to assign day bonuses.

Understanding Seniority Bonus Management

Review these considerations for managing seniority bonuses:

- You can assign day bonuses to employees to reduce the seniority that is necessary before step increment.
- Step duration reductions that are granted are given in years, months, and days and are associated with the step.
- When an employee is in a substep, the step duration reduction is not granted within the substep, but within the step that corresponds to the scale letter.
- Step duration reductions are taken into account in the seniority calculation collective process.
- For step duration reductions, the system can control the number of bonus days.

If the corps setup authorizes a step duration reduction control, the number of bonus days must not exceed the difference between the average step duration and the minimum step duration. Minimum and average step duration is defined on the Steps page. Seniority reduction control is defined on the Corps page.

Note. Day bonuses reduce the seniority that is necessary before step increment but they do not reduce the seniority necessary before substep increment.

Pages Used to Manage Seniority Bonuses

Page Name	Object Name	Navigation	Usage
Sen Bonus - Overall Data (seniority bonus - overall data)	FPABONUS_PNL1	Workforce Administration, Job Information, Update Seniority Bonus FPS, Sen Bonus - Overall Data	Add a new seniority bonus action.
Sen Bonus Days (seniority bonus days)	FPABONUS_PNL2	Workforce Administration, Job Information, Update Seniority Bonus FPS, Sen Bonus Days	Assign day bonuses.
Delete Career Data FPS - Sen Bonus - Overall Data (delete career data FPS - seniority bonus - overall data)	FPABONUS_PNL1D	Workforce Administration, Job Information, Delete Career Data FPS, Sen Bonus - Overall Data	View and delete previously recorded seniority bonus data.
Delete Career Data FPS - Sen Bonus Days (delete career data FPS - seniority bonus days)	FPABONUS_PNL2D	Workforce Administration, Job Information, Delete Career Data FPS, Sen Bonus Days	View and delete previously recorded seniority bonus data.

Assigning Day Bonuses

Access the Sen Bonus Days page.

Sen Bonus - Overall Data | **Sen Bonus Days**

CLAUTERET, Stacy ID: SFC8004 Empl Rcd#: 0

Seniority Bonus Find | View All First 1 of 1 Last

Sen Bonus Code: SF005 Annual Seniority Bonus + -

Days of Bonus Find | View All First 1 of 1 Last

Effective Date: 11/20/2002 Civil Servant Actual + -

Civil Service Position Group: ACT **Career Advancement %:** % 100

Bonus Origin

☒ Automatic ☐ Manual

Grade: SFG014 Civil Engineer

Step: 01

Seniority Bonus Days

Years Months Days

1

Bonus End Date:

Sen Bonus Days page

Enter the seniority bonus days and the bonus end date.

Managing Absences

This section discusses how to track an employee's absences.

Pages Used to Manage Absences

Page Name	Object Name	Navigation	Usage
Absences - Overall Data	FPAEEABSENCE_PNL1	Workforce Administration, Job Information, Absences FPS, Absences - Overall Data	Add an absence action.
Absences	FPAEEABSENCE_PNL2	Workforce Administration, Job Information, Absences FPS, Absences	Track an employee's absences.

Tracking an Employee's Absences

Access the Absences page.

Absences page

There is no interaction between the Civil Service Position business process and Absences. An absence that is selected in the Civil Service Position business process is not automatically retrieved in Absences, or vice versa. These two business processes are independent.

To track absences:

1. Enter the Position Expected End Date field.
Depending on the action and its setup, this field can be required or optional.
2. Enter the number of renewals and the duration of the absence in days.
3. If necessary, enter a comment.

Tracking Supporting Documents

When you hire an employee or update certain employee personal data (address change or marital status change), the employee must provide certain supporting documents. Use the Employee Supporting Documents page to track the supporting documents the employee provides.

This section discusses how to track supporting documents.

Page Used to Track Supporting Documents

Page Name	Object Name	Navigation	Usage
Employee Supporting Documents	FPAEESUPDOC_PNL	Workforce Administration, Increase Workforce, Supporting Documents FPS	Track an employee's supporting documents.

Tracking Supporting Documents

Access the Employee Supporting Documents page.

Employee Supporting Documents

EmplID: SFCA001 **Marchand, Audrey**

Action Date Find | View All First 1 of 1 Last

Effective Date: 02/01/2002

Supporting Documents Tracking Find | View All First 1 of 1 Last

Action	Type of Document	Sup Doc ID	Doc Deliv Dt
SFB Hire	SF0001 Acct info		

Employee Supporting Documents page

The page displays the list of supporting documents automatically generated if you select the Supporting Document Required check box before saving the Hire Employee or Update Personal Information components.

Enter the type of supporting document provided in Sup Doc ID (supporting document ID) and the date you received it in Doc Deliv Dt (document delivery date).

Reviewing Employee Data

This section provides a list of pages you can use to review previous actions and data for an employee.

Pages Used to Review Employee Data

Page Name	Object Name	Navigation	Usage
Career Storage 1	FPAEECARHIST_PNL1	Workforce Administration, Job Information, Review Job Information, Career Archive FPS, Career Storage 1	View an employee's previous career data.
Career Storage 2	FPAEECARHIST_PNL2	Workforce Administration, Job Information, Review Job Information, Career Archive FPS, Career Storage 2	View an employee's previous career data.
Career Storage 3	FPAEECARHIST_PNL3	Workforce Administration, Job Information, Review Job Information, Career Archive FPS, Career Storage 3	View an employee's previous career data.
Assignment Storage 1	FPAEEPOSHIST_PNL1	Workforce Administration, Job Information, Review Job Information, Assignment Archive FPS, Assignment Storage 1	View an employee's previous assignment data.
Assignment Storage 2	FPAEEPOSHIST_PNL2	Workforce Administration, Job Information, Review Job Information, Assignment Archive FPS, Assignment Storage 2	View an employee's previous assignment data.
Assignment Storage 3	FPAEEPOSHIST_PNL3	Workforce Administration, Job Information, Review Job Information, Assignment Archive FPS, Assignment Storage 3	View an employee's previous assignment data.
Compensation Storage 1	FPAEESALHIST_PNL1	Workforce Administration, Job Information, Review Job Information, Compensation Archive FPS, Compensation Storage 1	View an employee's previous compensation data.
Compensation Storage 2	FPAEESALHIST_PNL2	Workforce Administration, Job Information, Review Job Information, Compensation Archive FPS, Compensation Storage 2	View an employee's previous compensation data.
Work Time Storage 1	FPAEEWORHIST_PNL1	Workforce Administration, Job Information, Review Job Information, Work Time Archive FPS, Work Time Storage 1	View an employee's previous work time data.

Page Name	Object Name	Navigation	Usage
Work Time Storage 2	FPAEEWORHIST_PNL2	Workforce Administration, Job Information, Review Job Information, Work Time Archive FPS, Work Time Storage 2	View an employee's previous work time data.
EE Categorization Storage 1 (employee categorization storage 1)	FPAEEOTHHIST_PNL1	Workforce Administration, Job Information, Review Job Information, EE Categorization Archive FPS, EE Categorization Storage 1	View an employee's previous categorization data.
EE Categorization Storage 2 (employee categorization storage 2)	FPAEEOTHHIST_PNL2	Workforce Administration, Job Information, Review Job Information, EE Categorization Archive FPS, EE Categorization Storage 2	View an employee's previous categorization data.
CS Position Storage 1 (civil service position storage 1)	FPAEELEGHIST_PNL1	Workforce Administration, Job Information, Review Job Information, CS Position Archive FPS, CS Position Storage 1	View an employee's previous civil service positions.
CS Position Storage 2 (civil service position storage 2)	FPAEELEGHIST_PNL2	Workforce Administration, Job Information, Review Job Information, CS Position Archive FPS, CS Position Storage 2	View an employee's previous civil service positions.
Sen Bonus Storage 1 (seniority bonus storage 1)	FPABONHIST_PNL1	Workforce Administration, Job Information, Review Job Information, Seniority Bonus Archive FPS, Sen Bonus Storage 1	View an employee's previous seniority bonus data.
Sen Bonus Storage 2 (seniority bonus storage 2)	FPABONHIST_PNL2	Workforce Administration, Job Information, Review Job Information, Seniority Bonus Archive FPS, Sen Bonus Storage 2	View an employee's previous seniority bonus data.
Premiums Storage 1	FPAEEPREAMHST_PNL1	Workforce Administration, Job Information, Review Job Information, Premium Archive FPS, Premiums Storage 1	View an employee's previous premium data.
Premiums Storage 2	FPAEEPREAMHST_PNL2	Workforce Administration, Job Information, Review Job Information, Premium Archive FPS, Premiums Storage 2	View an employee's previous premium data.
Name History	FPAPERS_DT_HIST_1	Workforce Administration, Job Information, Personal Data Deleted ID FPS, Name History	View name information retained after deleting an employee ID.

Page Name	Object Name	Navigation	Usage
Address History	FPAPERS_DT_HIST_1B	Workforce Administration, Job Information, Personal Data Deleted ID FPS, Address History	View address information retained after deleting an employee ID.
Personal History	FPAPERS_DT_HIST_2	Workforce Administration, Job Information, Personal Data Deleted ID FPS, Personal History	View personal information retained after deleting an employee ID.
ID History	FPAPERS_DT_HIST_3	Workforce Administration, Job Information, Personal Data Deleted ID FPS, ID History	View ID information retained after deleting an employee ID.
Employee Personal File Cncl (employee personal file cancel)	FPAAEELEGAL_HIST3	Workforce Administration, Job Information, Employee File Cncl FPS	View employee record information retained after deleting an employee ID.

CHAPTER 6

Rating Employees

This chapter provides an overview of employee ratings and explains how to:

- Prepare employee rating lists.
- Calculate employee ratings.

Understanding Employee Ratings

The employee rating process involves PeopleSoft Human Resources Manage Employee Reviews as well as PeopleSoft Human Resources Manage French Public Sector. You create employee ratings using PeopleSoft Human Resources Manage Employee Reviews, and identify employees to be rated and apply rating equalization adjustments using French Public Sector.

The first step of the rating process is to identify employees to be rated. Using the Attendance Time Calculation page, the system creates a list of eligible employees, depending on attendance during a specified period. During this period, all civil service positions that are held by the employee are analyzed. Some civil service positions are defined as Absent for Rating and are subtracted from the total period length. The result is called *attendance time*.

Attendance time is evaluated:

- For the entire period (attendance time for employee review).
- For each grade to which the employee is assigned during the period.
- For each department to which the employee is assigned during the period.

The system examines the grade and department in which the employee has the longest attendance time during the rating period.

Then reviewers manually enter temporary ratings using PeopleSoft Human Resources Manage Employee Reviews.

After ratings have been assigned, you calculate a rating equalization adjustment constant that enables you to get a final rating calculated from the individual temporary rating. The Final Rating process (HR_FPFIRA_CI) in PeopleSoft Application Engine calculates the final ratings after the adjustment constant has been determined.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Employee Reviews

Preparing Employee Rating Lists

This section discusses how to:

- Select the period and group of employees for which to calculate attendance time.
- View attendance time calculation results.
- Create a list of employees who meet attendance time requirements.

See Also

[Chapter 3, “Setting Up French Public Sector Tables,” Defining Civil Service Positions, page 12](#)

Prerequisites for Employee Rating Lists

You must run the merge process between French Public Sector (FPS) and PeopleSoft Human Resources data.

See Also

[Chapter 16, “Merging French Public Sector and PeopleSoft Human Resources Files,” page 167](#)

Pages Used to Prepare Employee Rating Lists

Page Name	Object Name	Navigation	Usage
Attendance Time Calculation	RUNCTL_FPA1200	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Calculate Attendance Time FPS	Select the period and group of employees for which to calculate attendance time.
Attendance Time	FPA_RATPRS	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Attendance Time FPS	View attendance time calculation results.
List of Employees to be Rated	RUNCTL_FPA1210	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	Create a list of employees who meet attendance time requirements.

Selecting the Period and Group of Employees

Access the Attendance Time Calculation page.

Attendance Time Calculation											
Run Control ID: FPS01	Report Manager Process Monitor Run										
<table border="1"> <thead> <tr> <th colspan="2">Run Parameters</th> </tr> </thead> <tbody> <tr> <td>Start Date:</td> <td>01/01/2002 31 </td> </tr> <tr> <td>End Date:</td> <td>12/31/2002 31 </td> </tr> <tr> <td>SetID:</td> <td>C Q </td> </tr> <tr> <td>Department:</td> <td>43000 Q Research and Development</td> </tr> </tbody> </table>		Run Parameters		Start Date:	01/01/2002 31	End Date:	12/31/2002 31	SetID:	C Q	Department:	43000 Q Research and Development
Run Parameters											
Start Date:	01/01/2002 31										
End Date:	12/31/2002 31										
SetID:	C Q										
Department:	43000 Q Research and Development										

Attendance Time Calculation page

Start Date and End Date Enter the time period in which to calculate the employees' attendance days.

SetID and Department Specify a group of employees for which to calculate attendance days.

Note. Attendance time is calculated in thirtieths.

You must run the Employees to be rated process (FPA1200) before you can generate a list of employees to be rated.

Editing the List of Employees to be Rated

Access the List of Employees to be Rated page.

List of Employees to be Rated					
Run Control ID: FPS01	Report Manager Process Monitor Run				
<table border="1"> <thead> <tr> <th colspan="2">Report Request Paramater(s)</th> </tr> </thead> <tbody> <tr> <td>Rating Attendance:</td> <td>180</td> </tr> </tbody> </table>		Report Request Paramater(s)		Rating Attendance:	180
Report Request Paramater(s)					
Rating Attendance:	180				

List of Employees to be Rated page

Rating Attendance Enter the minimum number of days of attendance required for the employee to be rated. The reports run from this page use this value to select a group of eligible employees from the employees selected by the Employees to be rated process (FPA1200).

Report Information

You must run the Employees to be rated process (FPA1200) before running this report.

The List of Employees to be Rated report can be organized by:

- Employee ID, using FPA_RAT.

- Department list, using FPARAT2.

Each report row contains the employee ID, grade, and department. The system selects the grade and department with the longest employee attendance time. If two grades or departments have the same attendance times, the latest one is used.

Calculating Employee Ratings

After the employees have been identified, the reviewer evaluates those who are to be rated and assigns a temporary rating. Now you need to calculate an adjustment constant to account for differences between reviewers and calculate the final rating.

This section discusses how to:

- Determine which employees have not been rated.
- Calculate the adjustment constant.
- Calculate the final rating.

See Also

PeopleSoft Human Resources PeopleBook: Manage Employee Reviews

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments”

Pages Used to Calculate Employee Ratings

Page Name	Object Name	Navigation	Usage
Rating	RUNCTL_FPA025	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Evaluation Status FPS	Determine which employees have not been rated.
Adjustment Constant	RUNCTL_FPA030	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Calc Adjustment Constant FPS	Calculate the adjustment constant.
Final Rating	RUNCTL_FPA035	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Final Rating FPS	Calculate the final rating.
Final Rating Results	FPA_FINRA_RSL_T_PNL	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Rating Prces Results FPS	View the final rating results.

Determining Which Employees Have Not Been Rated

Access the Rating page.

Rating

Run Control ID: FPS01 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Report Request Paramater(s)

From Date: 01/01/2001

Thru Date: 12/31/2001

Corps: SFC001

Reviewer ID: SFCA005 Devick,Rene

☐ Rated Employees

Rating page

From Date and Thru Date Select the rating period.

Corps Enter a corps to see only employees of that corps or leave the field blank to receive information for all corps.

Reviewer ID Select a reviewer to have the report contain only the employees assigned to this reviewer. Leave the field blank to see employees assigned to all reviewers.

Rated Employees Select to have the report list employees who have been rated. Leave the check box clear to have the report list employees who have not been rated.

The Assessment Statuses report (FPA025) lists the selected employees and whether they have been rated.

Calculating the Adjustment Constant

Access the Adjustment Constant page.

Adjustment Constant

Run Control ID: FPS01 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Run Parameters

From Date: 01/01/2002

Thru Date: 06/30/2002

Corps: SFC005

☐ Adjustment Constant Rounding

Adjustment Constant page

From Date and Thru Date Select the rating period.

Corps Select a corps if you want to calculate the adjustment constant for that corps only. Leave the field blank to calculate the adjustment constant for all corps.

Adjustment Constant Rounding Select to have the adjustment constant rounded to multiple of .25 (for example, 1.25, 1.50, or 1.75).

The system calculates an adjustment constant to normalize the ratings of the various reviewers. The Adjustment Constant report (FPA030) shows evaluation details such as the average rating, number of points by corps, and points by reviewer. The system calculates an adjustment constant for each reviewer—the average of the total points minus the average of the reviewer's points.

Calculating the Final Rating

Access the Final Rating page.

The Final Rating process (HR_FPFIRA_CI) applies the adjustment constant to the temporary rating to give the employee a final score.

For each employee, the final rating overrides the initial rating. The effective date is 31/12; the initial rating is stored in an archive record.

CHAPTER 7

Processing Trainee Tenure

This chapter provides an overview of the tenure process for trainees and discusses how to:

- Calculate tenure dates.
- Search for employees to be given tenure.
- Inform supervisors.
- Approve and deny probation periods.
- Grant tenure.
- View employee status.

Understanding the Tenure Process

In French Public Sector, granting tenure to a trainee is a multistep process that implies many collective processes and transactions. You can also launch PeopleSoft Workflow during the process.

Prerequisites

The tenure process uses parameters from the following tables:

- FPS Installation Parameters
- Civil Service Position
- Grades

Calculating Tenure Dates

This section provides an overview of tenure date calculation and discusses how to calculate tenure dates.

Understanding Tenure Date Calculation

When determining exact tenure date and the probation period end date, the system must take into account part-time and breaks that are due to civil service positions.

The system considers:

- The hiring date and length of the tenure probation period.

Length is determined when you set up the trainee's grade.

- The civil service positions held during the probation period.

Some civil service positions can suspend the tenure probation period and postpone the probation period end date.

- The work time percentage for trainees who work part time.

Whether the calculation is in thirtieth or calendar days depends on your FPS Installation Parameters setup. The tenure date is the probation period end date, minus one day. The tenure becomes effective on the anniversary date.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up FPS Installation Parameters, page 27

Page Used to Calculate Tenure Dates

Page Name	Object Name	Navigation	Usage
Tenure Date Calculation	RUNCTL_FPA005	Workforce Administration, Tenure FPS, Calculate Tenure Date	Calculate the tenure date for individuals or groups.

Calculating Tenure Dates

Access the Tenure Date Calculation page.

Tenure Date Calculation page

You can calculate the tenure date for one employee or a group of employees.

ID and Empl Rcd# Leave these fields blank to calculate for all trainees.
(employee record number)

You can view the results of this calculation on the Career - Classification page.

See Also

Chapter 5, "Updating Employee Records," Entering Career Classification Data, page 80

Searching for Employees Who Are Eligible for Tenure

The system enables you to search for employees whose tenure dates fall within a specific period after you process tenure dates.

The Updt trainees to be given ten. (update trainees to be given tenure) process (FPA105) activates the Tenure flag for employees whose tenure date is between the system date and the duration that is defined in the FPS Installation Parameters. For example, if the duration is 30 days, the Tenure flag is activated for employees whose tenure date occurs within 30 days after processing.

Page Used to Search for Employees Who Are Eligible for Tenure

Page Name	Object Name	Navigation	Usage
Next Tenure	RUNCTL_FPA710	Workforce Administration, Tenure FPS, Calculate Future Tenures	Select the employees who are eligible for tenure.

Informing Supervisors

PeopleSoft Workflow enables you to send messages to supervisors of the trainees who are eligible for tenure to notify them that the tenure end date is near. Workflow is optional in the tenure process.

The Trainees tbc list process (FPTENURE) selects all trainees whose probation periods must be validated and who have an activated Tenure flag.

Page Used to Inform Supervisors

Page Name	Object Name	Navigation	Usage
Trainees to be given Tenure	PRCSRUNCNTL	Workforce Administration, Tenure FPS, Trainees to be Given Tenures	Inform managers of trainees who have been granted tenure using workflow.

Approving and Denying Probation Periods

Trainee Validation is a transaction process that enables the trainee supervisor to choose one of the following:

- Validating the tenure probation period.
- Renewing the probation period (once).
- Refusing the trainee.

Note. You can renew the probation period only once. If, at the end of the second probation period, the tenure is not approved, the trainee is refused.

When saving, there is no blocking control. The system checks competencies and accomplishments as well as the physical exam, but does not prevent the user from saving the transaction even if the physical exam is not yet recorded.

Also, a workflow is launched to give tenure or renew the probation period. The *Renew Probation Period* or *Accept Tenure* activities are in the worklist.

This section discusses how to validate or reject the tenure probation period.

Pages Used to Approve and Deny Probation Periods

Page Name	Object Name	Navigation	Usage
Competency Match	FPAEETENURE_PNL4	Workforce Administration, Tenure FPS, Validate Probation Period, Competency Match	Displays the employee's physical ability and matches employee competencies with those that are required by the job code. The Medical Exam frame shows the last physical exam results. It also indicates if the medical exam has not been tracked.
Accomplishment Match	FPAEETENURE_PNL3	Workforce Administration, Tenure FPS, Validate Probation Period, Accomplishment Match	Compare the employee's accomplishments with those that are required by the position.
Tenure PPd Validation (tenure probation period validation)	FPATEN_VALID_PNL1	Workforce Administration, Tenure FPS, Validate Probation Period, Tenure PPd Validation	Validate or reject the tenure probation period.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Performing Gap and Match Analyses on Your Workforce,” Matching Roles to Employees

Validating or Rejecting the Tenure Probation Period

Access the Tenure PPd Validation page.

The page displays trainee grade and step data. In the case of automatic step increment, the next step and corresponding compensation appear.

To validate or reject the tenure probation period, select *On Hold*, *Validated*, or *Rejected*.

Validating the probation period does not imply that the tenure becomes effective; you must still grant tenure.

You can renew a probation period only once. To renew a probation period after the first rejection, select the Status option in the worklist and enter the second probation period length (number of days).

When the probation period is rejected for the second time, the tenure is not validated, and the trainee is terminated.

Granting Tenure

You must grant tenure to make the tenure effective.

This section provides an overview of the rows created when saving the Assign Civil Servant Status component and tenure actions with or without step increment and discusses how to:

- Grant tenure.
- Enter the new employee status code.

Understanding Rows Created When Saving the Assign Civil Servant Status Component

When you save the Assign Civil Servant Status component, two rows are inserted into the employee record, one in the Status table and one in the Career table:

- The row that is inserted into the Status table shows the employee's new status after tenure.
- The row that is inserted into the Career table shows the tenure action, whether or not the tenure implies step increment.

The action code that corresponds to tenure is defined in the FPS Installation Parameters.

Understanding Tenure Actions With or Without Step Increment

If tenure is Without Step Increment, the tenure action does not terminate the step. In the action setup, select the Previous Instance Sen Carry Ov check box on the Action Details page.

If tenure is With Automatic Step Increment, clear the Previous Instance Sen Carry Ov check box.

Pages Used to Grant Tenure

Page Name	Object Name	Navigation	Usage
Tenure	FPAEETENURE_PNL1	Workforce Administration, Tenure FPS, Assign Civil Servant Status, Tenure	Grant tenure. Note. You can access only trainees whose probation period has been validated.
Competency Match	FPAEETENURE_PNL4	Workforce Administration, Tenure FPS, Assign Civil Servant Status, Competency Match	View competency data.
Accomplishment Match	FPAEETENURE_PNL3	Workforce Administration, Tenure FPS, Assign Civil Servant Status, Accomplishment Match	View accomplishment data.
New Status	FPAEETENURE_PNL2	Workforce Administration, Tenure FPS, Assign Civil Servant Status, New Status	Enter the new employee status code.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Performing Gap and Match Analyses on Your Workforce,” Matching Roles to Employees

Granting Tenure

Access the Tenure page.

Give Tenure Click to grant tenure to the employee. The default values for the Tenure Action and Reason codes prompt from the FPS Installation Parameters table. The effective date is the tenure date.

Entering the New Employee Status Code

Access the New Status page.

Enter the new employee status code.

The category is Civil Servant.

Viewing Employee Status

This section discusses how to view employee status.

Page Used to View Employee Status

Page Name	Object Name	Navigation	Usage
Status	FPAEESTATUS_PNL1	Workforce Administration, Job Information, Update Status FPS	View employee status. Note. Once an employee is granted tenure, you can access both successive statuses (trainee and civil servant).

Viewing Employee Status

Access the Status page.

Status			
De Fontene Léon	ID: SFC8001 Empl Rcd#: 0		
Status Find View All First 1 of 1 Last			
Effective Date:	01/01/1977   		
*Employee Status Code:	S Trainee Trainee		
☒ Comp/Salary Grade Table			
Access Mode:	C  Competition		
Tenure Date:			
Tenure Probation Period <table border="1"> <tr> <td>Length: 12 Months</td> <td>Probation Date:</td> </tr> </table>		Length: 12 Months	Probation Date:
Length: 12 Months	Probation Date:		

Status page

The page displays probation period lengths and end dates.

Probation Period Renewal

Consult the Status page to renew the probation period. After a renewal, the Probation Period Renewal information appears.

CHAPTER 8

Managing the Promotion Probation Period

This chapter provides an overview of promotion probation period setup and discusses how to:

- Assign a promotion probation period.
- Calculate promotion probation period end dates.
- Validate or deny a promotion.

Understanding Promotion Probation Period Setup

Promotion probation period functionality uses the following setup data:

- Days Before Tenure and Seniority Calculation data from the FPS Installation Parameters table.
- Promotion Probation Period Suspension data from the Civil Service Position table.
- Probation Period Length from the Grade table.
- Various fields from the Career table.

To create a promotion probation period for an individual employee, you select this option on the Career - Classification page.

Assigning a Promotion Probation Period

You assign a promotion probation period to an employee only when you are setting up a grade promotion implying a corps change.

To set up a grade promotion implying a corps change:

1. Access the Career - Overall Data page in the Increment Step/Promotion FPS component and insert a new row. Use Grade Promotion as the action.
2. Access the Career-Classification page in the Increment Step/Promotion FPS component.
3. Select the Trainee check box to indicate that the employee is beginning a probation period.
This check box appears only for employees who are not trainees.
4. Set the probation period to *In Progress*.

See Also

Chapter 12, “Processing Grade Promotions,” page 139

Calculating Promotion Probation Period End Dates

This section discusses how to calculate promotion probation period end dates.

Pages Used to Calculate Promotion Probation Period End Dates

Page Name	Object Name	Navigation	Usage
Promotion PPd End Date Calcul (promotion probation period end date calculation)	RUNCTL_FPA005	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Calculate End of Probation Pd	Calculate the promotion probation period end dates.
Current PPd Schedule (current probation period schedule)	RUNCTL_FROMTHRU	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Current Probation Schedule Rpt	Generate the Probation Period in Progress Schedule report (FPA405), which lists employees who have a promotion probation period during a selected period.

Calculating Promotion Probation Period End Dates

Access the Promotion PPd End Date Calcul page.

Promotion PPd End Date Calcul

Run Control ID: FPS01 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Run Parameters

ID:

Empl Rcd#:

Promotion PPd End Date Calcul page

To calculate the probation period end date for all trainees, leave the ID (employee ID) and Empl Rcd# (employee record number) fields blank.

The Promotion PPd end date calcul (promotion probation period end date calculation) process (FPA305) determines the exact probation period end date, accounting for civil service position breaks and part-time positions.

This SQR process:

- Calculates the date, depending on the corps change date and the probation period length.

Length is determined when you set up the new grade.

- Considers the civil service positions that are held by an employee during the probation period.

Some civil service positions can suspend the promotion probation period and postpone the probation period end date.

- Considers the work-time percentage for a part-time employee.
- Displays the Period End Date on the Career-Classification page.

Validating or Denying Promotions

At the end of the promotion probation period, you must validate or deny the promotion. To do this, the system must know the promotion probation period end date, so you must have run the End Date Calculation (FPA305).

This section discusses how to:

- Validate a promotion
- Deny a promotion

Validating a Promotion

To validate a promotion:

1. Access the Career - Classification page.
2. Scroll to the row with the last action that is recorded in the employee record.
3. Select Validated.
4. (Required) Enter the appointment in corps date.

See Also

Chapter 5, “Updating Employee Records,” Entering Career Classification Data, page 80

Denying a Promotion

To deny a promotion:

1. Access the Delete Career Data FPS - Career - Classification page.
2. Scroll to the row with the last recorded action in the employee record.
3. In the Probation Period group box, select Rejected.
4. Save the row.

The move is deleted in the record. Data is stored in the Delete Moves table.

5. To delete other rows that are associated with the same promotion probation period, repeat these instructions.

See Also

Chapter 5, “Updating Employee Records,” Deleting Career Data, page 84

CHAPTER 9

Calculating Seniority and Length of Service

This chapter provides an overview of seniority and length of service, lists prerequisites, and discusses how to:

- Calculate seniority and length of service.
- View seniority information.

Understanding Seniority and Length of Service

Seniority is a measurement of time that is spent in a particular condition. For example, Category Seniority is the amount of time that an employee has spent in one category. The system measures from the date of entry into the category to the date of category change. If the employee has not changed categories, the date of the calculation is used as the end date. Corps Seniority, Grade Seniority, and Actual Step Seniority follow the same pattern. Since civil service positions carry different weights in seniority calculations, each civil service position has career advancement percentages that affect seniority and length of service calculations.

Length of service resembles seniority except that it uses career advancement percentages that are associated with lengths of service. The system uses steps, grades, corps and categories for lengths of service.

Seniority and length of service calculations for steps, grades, corps and categories relate to each other as follows:

- Grade seniority equals total actual step seniority for the steps of the grade.
- Corps seniority equals total grade seniority for the grades belonging to this corps.
- Category seniority equals total corps seniority for the corps belonging to the same category.

Similarly:

- Grade length of service equals total actual step lengths of service.
- Corps length of service equals total grade length of service.
- Category length of service equals total corps length of service.

The system uses seniority values to calculate step increments and seniority and length of service are criteria for grade promotion.

Career Advancement Percentages

While assigned a category, corps, grade and step, an employee is also assigned a civil service position. Each civil service position carries a different weight in seniority calculations, represented by its career advancement percentage. You define two such percentages for each civil service position:

- The seniority career advancement percentage is used to calculate the employee's seniority between two dates.

- The length of service career advancement percentage is used to calculate the employee's length of service between two dates.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Defining Civil Service Positions, page 12

Seniority Credits

Seniority credits are applied only within the step.

Reduction in Step Duration

Managers can grant reductions in step duration to hasten an employee's step promotion. The seniority credits are durations expressed in years, months, and days. Reductions in step duration are assigned within a step and cannot be carried over.

Step Career Seniority is the actual step seniority, plus any reductions in step duration. The calculation accounts for the seniority career advancement percentage but not the work-time percentage.

Seniority Carryover at Step Increments in the Same Grade

An employee might be in a civil service position that does not authorize advancement on the previously scheduled advancement date. In this case, the advancement is postponed until the employee holds a civil service position that authorizes advancement.

The *Credited Seniority* is the seniority that is to be carried over from the previous career classification. When calculating advancement dates, the credited seniority is added to the career seniority.

When advancement occurs, the employee's seniority can be greater than the average step seniority. The difference is the seniority carryover.

Seniority to be Carried Over is the career seniorities, plus the credited seniority, minus the reductions in step duration and the average step duration.

This seniority carryover functionality is applied only within the same grade.

Note. Credited seniority in the step is also generated in case of reclassification. If the reclassification simulation is validated, the employee is granted a step increment with grade change. A conversion formula is applied to the Actual Seniority in previous step. The result of this conversion enables you to enter the Seniority Credited in the new step.

See Also

Chapter 13, “Administering Reclassification,” page 145

Prerequisites

Seniority and length of service calculations use information from the following tables:

- FPS Installation Parameters

Indicate how the system calculates seniority, either thirtieth or calendar. The tenure, seniority, and advancement processes use this setup.

- Civil Service Position

Define the Seniority and Service Length Career Advancement Percentages for each civil service position.

- Salary Grade Table - Steps

Define the advancement rules for each Salary Grade Table/Scale/Step and indicate the average Length in (Sub)Step, Minimum Length for (Sub)Step Increment, and Theoretical Career Seniority.

- Actions

Define the actions for which the system calculates seniority carryover by selecting the Previous Instance Seniority Carry Over check box on the Action page. The system records these actions in the Career table, but they do not terminate the current step. For example, tenure without step increment and forced index assignment are moves that are recorded in Career, but they neither modify nor terminate the employee's current step. The system calculates seniority move by move.

Calculating Seniority and Length of Service

Business rules for calculating seniority and length of service are principally about taking into account steps that are not terminated; that is, the management of many successive actions within the same step—some actions authorize the addition of the previous instance seniority to the current instance seniority. To determine whether an action terminates a step, view the Step Terminated check box on the Career - Classification page.

This section provides an overview of how seniority definitions account for steps not terminated and discusses how to:

- Start the seniority calculation.
- Calculate seniority and length of service.

Understanding How Seniority Definitions Account for Steps Not Terminated

When an action does not terminate a step, the system applies the following rules:

- Actual step seniority accrues.
- Reductions in step duration granted for the grade and step are accrued in Step Career Seniority.
All reductions in step duration are retrieved in the first step row. Step Career Seniority is calculated by row.
- No seniority is carried over.
- Credited Seniority is equal to the credited seniority in the step, plus the previous instance career seniority.

Pages Used to Calculate Seniority and Length of Service

Page Name	Object Name	Navigation	Usage
Seniority Calculation	RUNCTL_FPA315	Workforce Administration, Collective Processes, Manage Advancement FPS, Calculate Seniority	Start the seniority calculation.
Calculator	RUNCTL_FPA316	Workforce Administration, Collective Processes, Manage Advancement FPS, Calculate Length of Service	Calculate seniority and length of service between two dates for an employee.

Starting the Seniority Calculation

Access the Seniority Calculation page.

To calculate seniority:

1. Enter the run parameters.
Processing can be launched for one employee or for all employees with career data. For all employees, leave the Employee ID and Record Number fields blank.
2. Enter the Thru Date (through date) to request seniority calculation on a date that falls before or after the current date. If you do not enter the Thru Date, the system uses the current date.
3. Run the Seniority Calculation process (FPA315).

Seniority and Length of Service Calculation

The results of the enables you to determine, for each move recorded in an employee career, the following values:

- Actual Seniority in step.
- Seniority in grade, corps, or category.
- Length of Service in step, grade, corps, or category.
- Career Seniority in step
- Seniority that is to be carried over in step and Credited Seniority in step.
- Seniority in Salary Grade Table.

This seniority corresponds to the theoretical career seniority that you define when you set up the step.

The automatic step increment process uses the results of some of these calculations.

Note. Entry seniorities are not taken into account in seniority calculations and processes. They are described in the Recording Entry Seniority Earned in Another Organization section of the “Updating Employee Records” chapter.

Calculating Seniority and Length of Service

Access the Calculator page.

Calculator

Run Control ID: FPS01
[Report Manager](#)
[Process Monitor](#)

Run

Run Parameters

ID: SFCS004 CLAUTERET, Stacy
Empl Rcd#: 0
From Date: 11/30/1998 End Date: 10/31/2002

Seniority

Years	Months	Days
0	0	0

Length of Service

Years	Months	Days
0	0	0

Run

Transfer >> Civ Serv Position

Calculator page

Enter the employee ID, employee record number, and period of time for which to calculate seniority and length of service.

Run Click to calculate and display the results.

Transfer >>Civ Serv Position (transfer >> civil service position) Click to access the employee's civil service position history.

Viewing Seniority Information

The Career Seniority page is a synopsis page that enables you to view the various seniorities that are associated with each employee career status.

The system displays the various seniorities and lengths of service, calculated according to the definitions and rules explained in this chapter, for each action. With the step seniority and length of service, the step career seniority and theoretical seniority are displayed.

Page Used to View Seniority Information

Page Name	Object Name	Navigation	Usage
Career Seniority	FPAEESENSYNT_PNL	• Workforce Administration, Job Information, Review Job Information, Career Seniority FPS • Workforce Administration, Collective Processes, Manage Advancement FPS, Review Career Seniority	View seniorities that are associated with each employee career status. Note. You can select only employees with Career management when entering this page.

CHAPTER 10

Processing Career Advancement

This chapter provides an overview of the career advancement processes, lists prerequisites, and discusses how to:

- Calculate step increment dates.
- Search for next advancements.
- Calculate collective advancement.
- Advance employees manually.
- Simulate advancement.

Note. In the Manage French Public Sector business process, career advancement pertains to automatic step or substep increment. Unless otherwise indicated, all business rules that are defined for step increments are also applied to substep increments within the same scale letter.

Understanding the Career Advancement Processes

The global advancement process exists in three forms:

- Advancement date calculation

Calculates the expected step or substep increment date for one employee or all employees.

- Advancement processing

Comprises several successive processes. All employees whose automatic step or substep increment is pending are listed and moved through collective processing.

- Advancement simulation

Enables you to simulate future automatic step or substep increments.

For each process, the affected employee status must authorize career management and automatic step increment. The current step must also authorize automatic advancement.

Prerequisites

All automatic step increment processes use the following tables:

- FPS Installation Parameters

The processes use Days Before Step Increment, Action for Step Increment, Seniority Calculation, and Terminating Date.

- Status/Population Codes.

The system checks to see if the automatic step increment is authorized for each status. Processes are run only for employees whose statuses authorize career management and automatic step increment. The Career Data Authorization and Automatic Advancement check boxes must be selected.

- Salary Grade Table - Steps

The processes use Length in Step or Sub-step, Minimum Length for (Sub)Step, Automatic (Sub)Step Increment, and Next (Sub)Step for Increment. The processes consider only employees whose current steps allow automatic advancement.

- Civil Service Positions

The system checks to see if automatic step increment is authorized for each civil service position. The employee's civil service position at the advancement date must authorize automatic advancement. If it does not, advancement is postponed until the employee's civil service position changes.

Calculating Step Increment Dates

This section provides an overview of the Advancement Date Calculation process and discusses how to calculate step increment dates.

Understanding the Advancement Date Calculation Process (FPA005)

Before starting the advancement process, you must calculate seniority. The advancement process begins on the date when the employee was assigned his or her current step or substep.

Once it has started, the process considers:

- The credited seniority, which is determined by the seniority process.
- The career advancement percentage that is associated with civil service position seniority.
- Reductions in step duration for step increments, but not for substep increments.
- All setup data that is established in the FPS Installation Parameters, Status/Population Codes, Salary Grade - Steps, and Civil Service Position tables.

The calculation does not consider part-time work.

The process results in the creation of the FPA005.LIS file, which contains employee ID, seniority, and advancement date data for a list of employees. Possible errors are also indicated on the report (such as credited seniority longer than the average length).

Use the Career - Compensation Seniority page to view the result of an individual employee advancement date calculation. Each time you launch the advancement process, the date is recalculated depending on the employee record.

See Also

[Chapter 9, “Calculating Seniority and Length of Service,” page 125](#)

[Chapter 5, “Updating Employee Records,” Managing Career Data, page 78](#)

Page Used to Calculate Step Increment Dates

Page Name	Object Name	Navigation	Usage
Step Incremnt Date Calculation (step increment date calculation)	RUNCTL_FPA005	Workforce Administration, Collective Processes, Manage Advancement FPS, Step Increment Date	Calculate the expected step or substep increment dates.

Calculating Step Increment Dates

Access the Step Incremnt Date Calculation page.

Step Incremnt Date Calculation

Run Control ID: FPS01 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Run Parameters

ID:	SFC8004	CLAUTERET, Stacy
Empl Rcd#:		

Step Incremnt Date Calculation page

You can calculate the advancement date for one employee or all employees.

ID and Empl Rcd# Leave these fields blank to calculate for all employees.
(employee record number)

This page launches the Advancement Date Calculation process (FPA005).

Searching for Next Advancements

The system enables you to search for employees whose advancement date falls within a specific period after you run the Advancement Date Calculation process (FPA005). You define this period in the Days Before (Sub) Step Increment field in the FPS Installation Parameters component.

The Employees to be advanced process (FPA310):

- Activates the Advancement Flag for employees whose advancement date is between the system date and the duration that is defined in the setup.

For example, if the duration is 30 days, the advancement flag is activated for all employees whose advancement date is expected within 30 days after processing.

- Considers only employees whose current statuses and steps or substeps authorize automatic advancement and whose civil service positions on the expected advancement dates authorize automatic advancement.
- Accounts for HRMS security rules.

The system defines the department and employee scope that are affected by the process, depending on the user's operator code.

After each processing, employees that are to be advanced are listed in the FPA310.LIS file.

Pages Used to Search for Next Advancements

Page Name	Object Name	Navigation	Usage
Next Step Increment	RUNCTL_FPA710	Workforce Administration, Collective Processes, Manage Advancement FPS, Next Step Increment	Activate the advancement flag depending on FPS Installation Parameters and Step Increment Date.
Reset Date and Adv Flag (reset date and advancement flag)	PRCSRUNCNTL	Workforce Administration, Collective Processes, Manage Advancement FPS, Reset Advancement Dates	Reset advancement dates and advancement flags. Reset the test process.

Calculating Collective Advancement

Using the Step Increment process (FPA320), you can automatically move all employees whose Advancement Flag has been activated. Before launching this process, indicate which corps to run the process for.

The process updates the employees' Career records. A new row is inserted with the following field values:

- The Effective Date is the expected advancement date.
- The Action and Reason codes are defined in the FPS Installation Parameters table for step or substep increments.
- The step or substep is the Next Step for Advancement that is defined in the Step table.

Pages Used to Calculate Collective Advancement

Page Name	Object Name	Navigation	Usage
Automatic Step Increment	RUNCTL_FPA320	Workforce Administration, Collective Processes, Manage Advancement FPS, Automatic Step Increment	Launch the Automatic Step Increment process (FPA001) to move all employees with an activated Advancement Flag. FPA001 combines FPA310 and FPA320.
Step Increment	RUNCTL_FPA320	Workforce Administration, Collective Processes, Manage Advancement FPS, Step Increment	Start the Step Increment process (FPA320).

Advancing Employees Manually

To advance employees manually:

1. Access the Career - Classification page.
2. Click the Step Increment button.

This button appears after you launch the advancement calculation date and next step increment processes. The system inserts a new row with the following data:

- The effective date—the increment date that is calculated by FPA005.
- The action—the action for (sub)step increment that is defined by the FPS Installation Parameters.
- The step—the next (sub)step for increment that is defined by the Salary Grade Table - Steps page.

3. Save the data.

Simulating Advancement

Run the Advancement Simulation process (FPA010) to simulate future automatic step increments.

You must first calculate the advancement dates and select the period to be examined. Otherwise, the system simulates advancement for all dates that are available in the database. You can simulate advancement for a corps or an employee. The employee's status and civil service position must authorize advancement. Simulations are stored on the Career 2 table.

After each process, the career statuses of employees after advancement simulation are listed in the FPA010.LIS file. Run the Career Simulation report to print a list of simulated career data.

Pages Used to Run Simulations

Page Name	Object Name	Navigation	Usage
Step Increment Simulation	RUNCTL_FPA010	Workforce Administration, Collective Processes, Manage Advancement FPS, Step Increment Simulation	Start the advancement simulation process.
Delete Simulation Data	PRCSRUNCNTL	Workforce Administration, Collective Processes, Manage Advancement FPS, Delete Simulation Records	Clear the advancement simulations.
Reset Date and Adv Flag (reset date and advancement flags)	PRCSRUNCNTL	Workforce Administration, Collective Processes, Manage Advancement FPS, Reset Adv Dates	Reset the date and advancement flags created by your simulations.
Career Simulation	RUNCTL_FPACRYSTAL3	Workforce Administration, Collective Processes, Manage Advancement FPS, Career Simulation Report	Run the Career Simulation report (FPA_CARB) that lists the simulated career data after reclassification or simulation of step increment.

See Also

Chapter 13, “Administering Reclassification,” page 145

CHAPTER 11

Running the Retroactivity Process

This chapter provides an overview of retroactivity in French Public Sector and discusses how to run the retroactivity process.

Understanding Retroactivity

Retroactivity is a way to manage the impact of inserting or deleting an action with an old effective date. An old effective date is an effective date older than the highest effective date in the employee's career data. This process consists of three steps:

- Deleting obsolete moves.
- Processing abrogation.
- Reconstituting career data.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up Retroactivity Rules, page 24

Running the Retroactivity Process

Each time that a retroactive move is recorded during a Career transaction, the system activates a retroactivity flag on the employee record. A message indicates when a retroactive move has been inserted or deleted.

The FPA600 SQR process searches for the retroactivity flags and does the following:

- Deletes previous actions that are obsolete following the retroactive move.
Moves are successfully deleted until the action ending the process is reached. If no action ending the process is met, French Public Sector deletes all the moves, including projected moves that might have already been recorded.
- Suspends bonuses that have been granted for a deleted grade or step.
- Generates abrogation for deleted events, if necessary.
If the order related to an event has been edited, when the event is deleted, it has to be abrogated (an abrogation order needs to be edited).
- Restores the employee career.

The objective is to generate the automatic step increments that must occur after a retroactive move. The reconstitution consists of calculating advancement dates and moving employees. Both processes occur as many times as needed until the action ending the process is reached or until today's date (projected moves are not reconstituted).

- Processes the suspended bonuses, while the reconstitution runs.
 - If the employee is still in the same step where the bonus was granted, the bonus is regranted.
 - If the employee is no longer in the same step where the bonus was granted, you must manually grant the bonus.

A reassignment button appears on the Seniority Bonus Days page. Depending on the employee's career status, you can either reassign the bonus (for a projected bonus) or delete it.

This section discusses how to start retroactive processing.

Page Used to Run the Retroactivity Process

Page Name	Object Name	Navigation	Usage
Retroactivity Processing	RUNCTL_FPA005	Workforce Administration, Collective Processes, Manage Advancement FPS, Retroactivity Processing	Start retroactive processing.

Starting Retroactive Processing

Access the Retroactivity Processing page.

Retroactivity Processing

Run Control ID: FPS01 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Run Parameters

ID:

Empl Rcd#:

Retroactivity Processing page

To start retroactive processing, enter the run parameters and click Run. If an ID is not entered, the process applies to all employees with an active retroactive flag.

CHAPTER 12

Processing Grade Promotions

This chapter provides an overview of grade promotions and discusses how to select and edit promotable employees.

Understanding Grade Promotions

A grade promotion is a grade increase within the same corps. Generally, advancement is on merit. The promoted employees appear on an annual advancement table that is established with the consent of the appropriate committee.

The promotable employee functionality consists of the following steps:

- Establishing promotion criteria.
- Listing employees that are promotable according to your criteria.

This list is stored, but it can be modified.

- Storing and editing the list of promotable employees.

The career administrator can define additional criteria based on previous employee ratings. These changes are made online and are not stored.

Selecting and Editing Promotable Employees

This section discusses how to:

- Define promotion criteria.
- Select promotable employees.
- Edit promotable employees for a particular date.
- Run the Promotable Employees report.
- Define simulation criteria.

Pages Used to Select and Edit Promotable Employees

Page Name	Object Name	Navigation	Usage
Promotable Employee Criteria	FMPROMTABL_PNL	- Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Define Promotion Rules, Promotable Employee Criteria - Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Promotable Empl Criteria, Promotable Employee Criteria	Define promotion criteria.
Select Promotable Employees	RUNCTL_FPA800	Workforce Administration, Identify Promotable Empls FPS, Select Promotable Employees	Select the promotable employee population by running the Extract Promotable Employees process (FPA800).
Promotable Employees	FPAEEPROM_PNL	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Review Promotable Employees, Promotable Employees	View and edit the list of employees that are selected for promotion.
Promotable Employees Edit	RUNCTL_FPAPROM	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Promotable Employees Report	Run the Promotable Employees report.
Decision Aid	FPAEEPROM02_PNL	- Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Define Promotion Rules, Decision Aid - Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Promotable Empl Criteria, Decision Aid	Define simulation criteria.
Review Promotable Employees - Decision Aid	FPAEEPROM01_PNL	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Review Promotable Employees, Decision Aid	View the promotion simulation.

Defining Promotion Criteria

Access the Promotable Employee Criteria page.

Promotable Employee Criteria		Decision Aid	
Starting Date:	06/01/2002	SetID:	SF001
Grade of Origin:	SFG003	Administrative Empl 2nd Class	
Promotion Criteria Find View All First ◀ 1 of 1 ▶ Last			
*Grade SetID:	SF001	*New Grade:	SFG002
			Administrative Empl 1st Class
Corps:	SFC003	Administratif Employee	CS Catgy: C
Lowest Step:	10	Actual Seniority Y/M/D:	Length of Service Y/M/D
		2	
Highest Step:	11	Actual Seniority Y/M/D	Length of Service Y/M/D
Grade:	Administrative Empl 2nd Class	Seniority Y/M/D	Length of Service Y/M/D
Corps:	Administratif Employee		10
Category:	C		10

Promotable Employee Criteria page

To define promotion criteria:

1. Enter the grade after promotion.
2. Enter the statutory criteria for step and seniority.

Each criterion is optional.

Selecting Promotable Employees

Access the Select Promotable Employees page.

To create a list of promotable employees, enter the starting date (date of eligibility for promotion) and the grade of origin.

Note. The starting date is the date used to calculate seniority.

The Extract Promotable Employees process (FPA800) creates a list of promotable employees according to statutory criteria. This list is stored, but it can be modified.

Editing the Promotable Employee List

Access the Promotable Employees page.

Promotable Employees | Promotable Employees | Decision Aid | Decision Aid

Starting Date: 06/01/2002 **SetID:** SF001 **Grade of Origin:** SFG003

Grade after Promotion **SetID:** SF001 **New Grade:** SFG002

Promotable Employees Find | View All First 1 of 1 Last

*EmpID: [] Empl Rcd#: 0

☐ Selected by Processing Corps: CS Catgy: Date of Birth:

Step: Seniority Y/M/D Y/M/D

Grade: Y/M/D Y/M/D Y/M/D

Corps: Y/M/D Y/M/D Y/M/D

Category: Y/M/D Y/M/D Y/M/D

Rating Years **N-1** **N-2** **N-3**

Access Mode:

Promotable Employees page

Review the list of promotable employees. You can add or delete employees to include in the Promotable Employee report.

Running the Promotable Employees Report

Access the Promotable Employees Edit page.

Enter the starting date and run the Promotable Employees report (FP_PROM). This report lists the employees promotable by a given date. You must run the Extract Promotable Employees process (FPA800) before running this report.

Defining the Simulation Criteria

Access the Decision Aid page.

Promotable Employee Criteria | Decision Aid

Starting Date: 06/01/2002 **SetID:** SF001 **Grade of Origin:** SFG003 **Administrative Empl 2nd Class**

Additional Criteria Find | View All First 1 of 1 Last

Years N-1 [] **Years N-2 Rating:** [] **Years N-3** []

Rating: [] **Rating:** []

Access Mode: []

Decision Aid page

Enter data to refine the selection of promotable employees. Simulation criteria are optional.

The simulation criteria you enter on this page affects the simulation data displayed in the Review Promotable Employees component.

Note. The system never stores the list of employees resulting from the simulation in the database.

**Years N-1, Years N-2,
and Years N-3**

Enter the minimum rating you want the employee to have received in the previous year (n-1), two years before the current year (n-2), and three years before the current year (n-3).

CHAPTER 13

Administering Reclassification

This chapter provides an overview of reclassification and discusses how to:

- Set up the reclassification process.
- Process reclassification simulations.
- Validate reclassifications.
- Process career updates.

Understanding Reclassification

The objective of reclassification is to update career data with changes stemming from a change in the employee's grade and step.

The process determines which employees meet the conditions to access a new grade/step within a particular time frame either prior to the reclassification date or during the period between the reclassification date and the application administration date. The reclassification date is the effective date of the Reclassification table.

The reclassification process includes several steps:

- Defining the reclassification conditions and procedures on the reclassification chart.
- Simulating reclassification and saving the results in a temporary table.
- Validating reclassifications, collectively or individually.
- Inserting valid reclassifications into the employee records.

Setting Up the Reclassification Process

The reclassification process relies on the reclassification ID. This ID establishes which circumstances result in reclassification and the effects of the reclassification. This data is stored in the Reclassification table.

This section discusses how to:

- Specify the grade, step, action, and reason that are required for reclassification.
- Enter the requirements for reclassification.
- Enter the grade and step after reclassification.

Pages Used to Set Up the Reclassification Process

Page Name	Object Name	Navigation	Usage
Reclassification General Info (reclassification general information)	FPMCONVTABL_PNL1	- Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Reclassification Table, Reclassification General Info - Workforce Administration, Collective Processes, Reclassify Employee FPS, Define Reclassification, Reclassification General Info	Specify the grade, step, action, and reason that are required for reclassification.
Reclassification Criteria	FPMCONVTABL_PNL2	- Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Reclassification Table, Reclassification Criteria - Workforce Administration, Collective Processes, Reclassify Employee FPS, Define Reclassification, Reclassification Criteria	Enter the requirements before reclassification for each option in each grade and step that is affected.
Reclassification - New Grade	FPMCONVTABL_PNL3	- Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Reclassification Table, Reclassification - New Grade - Workforce Administration, Collective Processes, Reclassify Employee FPS, Define Reclassification, Reclassification - New Grade	Enter the grade and step after reclassification. Define the seniority correction formula.

Specifying the Grade, Step, Action, and Reason Required for Reclassification

Access the Reclassification General Info page.

Reclassification General Info		Reclassification Criteria	Reclassification - New Grade
Reclassification ID: SF1			
Reclassification Find View All First 1 of 1 Last			
*Effective Date: 06/01/2002			
Grade of Origine Find View All First 1 of 1 Last			
*SetID: SF001			
*Grade: SFG003 Administrative Empl 2nd Class			
*Step: 10			
Reclassification Details Find View All First 1 of 2 Last			
*Serial Number: 1		*Order Date: 08/12/2002	
Action: SFX		Increase of Point Value	
Reason Code:			
Comments:			

Reclassification General Info page

Grade Enter the value before reclassification.

Step Enter the value before reclassification.

Serial Number You can differentiate among several reclassification options for the same grade and step before reclassification. Sort assumptions from the most attractive and restricting (lowest serial number) to the least attractive (highest serial number). To sort the different options in the same grade and step, refer to the new status index value. The most attractive option is the one that shows the highest index after reclassification.

Order Date Enter the date the government issued the order that defined the rules of the reclassification.

Action and Reason Code Enter the action code and reason that qualify the reclassification.

Entering the Requirements for Reclassification

Access the Reclassification Criteria page.

Reclassification General Info		Reclassification Criteria		Reclassification - New Grade	
Reclassification ID: SF1					
Reclassification Find View All First 1 of 1 Last					
Effective Date: 06/01/2002					
Grade of Origine Find View All First 1 of 1 Last					
SetID: SF001					
Grade: SFG003 Administrative Empl 2nd Class					
Step: 10					
Reclassification Criteria Find View All First 1 of 2 Last					
Serial Number: 1		Order Date: 08/12/2002			
Requirements before Reclassification					
Actual Min Seniority: 2 /		Employment Date Before:			
Actual Max Seniority: 4 / 3		Employment Date After:			
Step Seniority: 2 /		Minimum Age:			
		Minimum Rating:			

Reclassification Criteria page

Seniority and age conditions are in years and months. All conditions displayed on this page are optional.

Entering the Grade and Step After Reclassification

Access the Reclassification - New Grade page.

Reclassification General Info		Reclassification Criteria		Reclassification - New Grade	
Reclassification ID: SF1					
Reclassification Find View All First 1 of 1 Last					
Effective Date: 06/01/2002					
Grade of Origine Find View All First 1 of 1 Last					
SetID: SF001					
Grade: SFG003 Administrative Empl 2nd Class					
Step: 10					
New Grade Find View All First 1 of 2 Last					
Serial Number: 1		Order Date: 08/12/2002			
After Reclassification					
*Grade: SFG002					
		Administrative Empl 1st Class			
*Step: 10		Seniority: Y/M/D		☐ Probationary Period	
Corrections - Seniority					
Multiplier: 1.000		Bonus:			

Reclassification - New Grade page

Grade Enter the value after reclassification.

Step Enter the value after reclassification.

Probationary Period	Select if required in the new grade.
Corrections - Seniority	Step seniority after reclassification = step seniority before reclassification × multiplier + reduction in step duration in years, months, and days.
Multiplier	Value is <i>1</i> when 100 percent seniority is retrieved, <i>0.5</i> when 50 percent is retrieved, and so on.

Processing Reclassification Simulations

This section discusses how to run the Reclassification Simulation process.

Page Used to Process Reclassification Simulations

Page Name	Object Name	Navigation	Usage
Reclassification Simulation	RUNCTL_FPA700	Workforce Administration, Collective Processes, Reclassify Employee FPS, Reclassification Simulation	Run the reclassification simulation process.

Running the Reclassification Simulation Process

Access the Reclassification Simulation page.

Reclassification ID	Enter the reclassification ID to use for the process.
Conversion Effective Date	The process compares the reclassification criteria against the employee's data on this date to determine whether to reclassify the employee.
Application Admin. Date (application administration date)	If an employee does not meet the reclassification criteria on the conversion effective date, the process checks to see if the employee meets the reclassification criteria by this date.

After you enter the run parameters, run the Reclassification Simulation process (FPA700). The process is as follows:

- The system calculates seniority.
- The system selects each grade and step combination from the reclassification chart.
If the same grade and step combination has several reclassification options, each is identified by a serial number in the reclassification chart. These options are processed in ascending order.
- The system selects employees whose data matches the reclassification requirements that are defined by the reclassification ID.
Requests and future actions are not considered.
- If an employee has a succession of open-ended contracts, the reclassification period can cover several contracts.
Reclassification criteria are matched for the periods during which the employee was active.

- If the employee meets all the reclassification conditions on the reclassification effective date, reclassification occurs, and the system generates a new position in the temporary Career 2 table on the reclassification effective date.
- If the employee does not meet the conditions on the effective date, but meets them by the application administrative date, the system checks to see if the criteria are met on the effective date of previous career rows.

The grade and step of the employee must be those that are defined in the criteria. If a row is retrieved, reclassification occurs on the move date. If no row is retrieved, reclassification occurs on the application administrative date.

- When reclassification is simulated, identical career classifications (same grade and step, steps that are not terminated in French Public Sector) with an effective date after the reclassification date are corrected.

The system generates a row with the same effective date and an increased serial number.

- The values from the reclassification process are stored on the Career 2 table; old data on that table is overwritten.

See Also

[Chapter 9, “Calculating Seniority and Length of Service,” page 125](#)

Validating Reclassifications

The Reclassification Validation page displays employees' career statuses before and after reclassification.

To validate each employee reclassification, activate the flag in front of each reclassification that is to be applied. Or use the Validate All option to validate all listed employees and then manually deselect those that you want to omit.

Page Used to Validate Reclassifications

Page Name	Object Name	Navigation	Usage
Reclassification Validation	FPAREGRADE_RAT_PNL	Workforce Administration, Collective Processes, Reclassify Employee FPS, Validate Reclassification	Validate the reclassification.

Processing Career Updates

After you save the validation, run the Reclassification Validation process (FPA710) to generate reclassification actions in the valid employee records.

During the process (depending on the reclassification action code), the system checks the Action table to see if an order (individual or collective) must be created. If so, the system generates the order elements.

If the inserted row's effective date precedes the effective date of a move that is already saved in Career, the retroactivity indicator (Retroactivity Flag) is generated. In this case, you must start retroactive processing once the reclassification processing ends.

See Also

Chapter 11, "Running the Retroactivity Process," page 137

Page Used to Process Career Updates

Page Name	Object Name	Navigation	Usage
Career Update	RUNCTL_FPA710	Workforce Administration, Collective Processes, Reclassify Employee FPS, Update Career	Run the Reclassification Validation process (FPA710) to generate reclassification actions in the valid employee records.

CHAPTER 14

Managing Requests

This chapter provides an overview of request management and discusses how to:

- Manage requests.
- Request a sanction or demotion.
- Run request reports.

Understanding Request Management

You can record an event or action in employee records as an action or as a request. The system enables you to create, accept, refuse, and delete requests. You can also manage sanction and demotion requests.

Request management appears in the following components:

- Increment Step/Promotion FPS (career data)
- Update Assignment FPS
- Update Compensation FPS
- Update Work Time FPS
- Update Categorization FPS (employee categorization data)
- Chg Civil Service Position FPS (civil service position data)
- Update Seniority Bonus FPS
- Grant Premiums FPS (employee premiums data)
- Absences FPS
- Freeze Advancement/Demotion FPS (sanction/demotion actions)

In transaction mode, the system controls requests. In collective processing, requests are not considered.

Managing Requests

This section discusses how to:

- Create a request.
- Accept a request.

- Refuse a request.
- Delete a request.

Creating a Request

Creating a request is like recording an action.

To create a request:

1. Access the part of the employee record that is affected by the request.
2. Insert a new action.
3. Select Request.
4. In the Request Information group box, enter the request data.

If the request is recorded in a given part of the employee record, no move with an action status of *Actual* and an effective date that is subsequent to the request effective date can be recorded in this part of the employee record (the parts are not linked).

After the request is created, the request status is *In Progress*. A reference number is assigned automatically to each new request.

Request Information group box

Accepting a Request

An *In Progress* request can be validated and accepted.

To accept a request:

1. Access the request.
2. Select the Status Date.
Modify the data in the component when necessary.
3. Click Validate Request.
4. Confirm the validation by clicking Save.

The request status is Accepted. Data in the Request frame is unavailable for entry. The action status is *Actual*.

Refusing a Request

You can refuse a request if the order has not been edited. Once an order is edited, you must abrogate the request to refuse it.

Refusing a request consists of manually modifying the move by selecting the rejected request status.

To refuse a request:

1. Access the Request record.
2. In the Request Status field, select *Request Rejected*.
3. In the Status Date field, enter the refusal date.
4. Save the request.

The move is deleted in the employee record. The data is stored in the delete move table.

See Also

[Chapter 5, “Updating Employee Records,” Deleting an Action, page 77](#)

Deleting a Request

You can delete a request if the order has not been edited. Once an order is edited, you must abrogate the request to delete it.

To delete a request, activate the delete row. The data is deleted and is not stored

See Also

[Chapter 5, “Updating Employee Records,” Deleting an Action, page 77](#)

Requesting a Sanction or Demotion

This section discusses how to:

- Request a sanction or demotion.
- Accept or refuse a sanction or demotion.

Pages Used to Request a Sanction or Demotion

Page Name	Object Name	Navigation	Usage
Sanct/Demotion - Overall Data (sanction/demotion - overall data)	FPAEESANCTION_PNL1	Workforce Administration, Job Information, Freeze Advancement/Demotion FPS, Sanct/Demotion - Overall Data	Create a demotion or sanction action/request.
Sanction/Demotion	FPAEESANCTION_PNL2	Workforce Administration, Job Information, Freeze Advancement/Demotion FPS, Sanction/Demotion	Enter the sanction or demotion details.

Requesting a Sanction or Demotion

Access the Sanct/Demotion - Overall Data page.

Recording a sanction request is the same as recording a sanction or a demotion.

See Also

Chapter 5, “Updating Employee Records,” Managing Sanctions and Demotions, page 85

Accepting or Refusing a Sanction or Demotion

To accept a sanction request or demotion, validate it in the Sanction/Demotion component or the Career component. The system updates both parts of the employee record.

To refuse a sanction request, delete it in the Delete Career Data FPS component.

Running Request Reports

The following table lists the run control pages that generate reports of requests in your system. All of the run control pages have an object name of RUNCTL_FPACRYSTAL1.

Page Name	Navigation	Usage
Assignment - Request tbc	Workforce Administration, Workforce Reports, Assignment - Request tbc FPS	Generate the Assignment - Request tbc report (FPA-AFFE). This report lists requests for assignment changes that need to be approved.
Career - Requests tbc	Workforce Administration, Workforce Reports, Career - Request tbc FPS	Generate the Career - Request tbc report (FPA-CARR). This report lists requests for career changes that need to be approved
Assignment - Req Rejected (assignment - request rejected)	Workforce Administration, Workforce Reports, Assignment - Rqst Rejected FPS	Generate the Assignment - Request Rejected report (FPAHISTA) that lists rejected assignment change requests.
Career - Request Rejected	Workforce Administration, Workforce Reports, Career - Request Rejected FPS	Generate the Career - Request Rejected report (FPAHISTC) that lists rejected career change requests.
Civil PosiPosit. - Req Reject (civil service position - request rejected)	Workforce Administration, Workforce Reports, CS Position - Rqst Reject. FPS	Generate the CSPosition - Request Rejected report (FPAHISTP) that lists rejected civil service position requests.
Compensation - Req Rejected	Workforce Administration, Workforce Reports, Compensatn - Rqst Reject. FPS	Generate the Compensation - Request Rejected report (FPAHISTS) that lists rejected compensation change requests.

Page Name	Navigation	Usage
Work Time - Req Rejected	Workforce Administration, Workforce Reports, Work Time - Rqst Rejected FPS	Generate the Work Time - Request Rejected report (FPAHISTW) that lists rejected work time change requests.
Civil Service Position	Workforce Administration, Workforce Reports, CS Position Request tbc FPS	Generate the CS Position tbc report (FPA-POSI) that lists civil service position change requests requiring approval.
Compensation - Request tbc	Workforce Administration, Workforce Reports, Compensation - Request tbc FPS	Generate the Compensation – Request tbc report (FPA-REMU) that lists compensation change requests requiring approval.
Work Time - Req tbc	Workforce Administration, Workforce Reports, Work Time - Request tbc FPS	Generate the Work Time - Request tbc report (FPA-TDTR) that lists work time change requests requiring approval.

CHAPTER 15

Managing Secondment

This chapter provides an overview of secondment management and describes how to:

- Set up external secondments.
- Set up internal secondments.
- End or return from secondments.
- Manage contributions for employees on external secondment.

Understanding Secondment Management

French Public Sector manages employee secondment by distinguishing between external and internal secondment. The home organization differs from the host organization during external secondment. During internal secondment, the home and host are the same.

While on external secondment, an employee is referred to as a received employee by the host organization and a sent employee by the home organization.

Prerequisites

Before you begin entering secondment positions, you must define authorized actions for employees on secondment for each civil service position.

To define authorized actions for employees on secondment:

1. Access the CS Position/Action page.
2. Distinguish between employees on secondment and employees not on secondment for each action.

See Also

[Chapter 3, “Setting Up French Public Sector Tables,” Authorizing Actions by Civil Service Position, page 21](#)

Setting Up External Secondment

This section describes how to:

- Hire an employee on external secondment.

- Register a sent employee.
- Enter secondment data.

Page Used to Set Up External Secondments

Page Name	Object Name	Navigation	Usage
Secondment Information	FPAEELEGAL_SEC	Click Secondment Information on the Civil Service Position Data page.	Enter secondment data.

Hiring an Employee on External Secondment

The Employee on Secondment position is recorded during the Initialize Status step of the hiring process.

To hire an employee on external secondment:

1. Access the Civil Service Position Data page.
2. Select Employee on Secondment.
3. Select External Secondment.
4. Click Secondment Information to enter the employee's home organization on the Secondment Information page.

See Also

Chapter 4, "Hiring French Public Sector Employees," page 53

Registering a Sent Employee

The secondment position is recorded in the Chg Civil Service Position FPS component.

To register a sent employee:

1. Access the Civ Serv Posit. - Overall Data page.
2. Select an action generating a secondment position.
3. Access the Civil Service Position Data page.
4. Select External Secondment in the Secondment group box.
5. Indicate the secondment expected end date.

Entering Secondment Information

Access the Secondment Information page.

Secondment Information

Receiving Organization:  Department of Transportation

Liabile Organisation ☒ **Job Leads to Civil Pension** ☐

Description:

Working Time % on Secondment: % **Proration Ratio:** 100 / 100

Title Number:

Secondment Information page

Receiving Organization and Liabile Organization Enter the organization. The Liabile Organization check box is automatically selected if appropriate for this organization.

Job Leads to Civil Pension Select if the secondment position must imply a call from the “employee” contribution. Depending on the job in the host organization, either the host organization must calculate and deduct the employee contribution (the check box is selected), or the home organization must calculate it and send the employee the share to be paid (the check box is cleared).

Title Number Enter call letters identifying the position. This information is mandatory if contributions are calculated in your organization.

See Also

[Chapter 3, “Setting Up French Public Sector Tables,” Defining Civil Service Positions, page 12](#)

[Chapter 15, “Managing Secondment,” Managing Contributions for Employees on External Secondment, page 163](#)

Setting Up Internal Secondment

For internal secondment, the employee has two records in PeopleSoft Human Resources French Public Sector: the initial record and the secondment record. In the initial record, the employee’s civil service position is *On Secondment*. In the secondment record, the employee is *Employee on Secondment* with an *Active* civil service position. Then both careers can develop concurrently.

This section describes how to:

- Record secondment on the employee’s initial record.
- Create a secondment record.

Recording Secondment on the Employee's Initial Record

To record secondment:

1. Access the Civ Serv Posit. - Overall Data page.
2. Select an action generating a secondment position.
3. Access the Civil Service Position Data page.
4. Select Internal Secondment in the Secondment group box.
5. Indicate the secondment expected end date.

Creating a Secondment Record

Creating a concurrent employee record is just like hiring a new employee. The action code is set up in the Add Concurrent Empl Record FPS component.

To create a new internal secondment record:

1. Access the Status page of the Add Concurrent Empl Record FPS component.
2. Enter the employee ID and change the record number to 9 when accessing the component.

In PeopleSoft Human Resources French Public Sector, an internal secondment record number is always 9. This record number is mandatory.

3. Fill in the Status page.
4. Access the Civil Service Position Data page.
5. Select Employee on Secondment.
6. Select Internal Secondment.
7. Enter the employee's business unit, department, and job code.
8. Save.

When saving, the system checks if, on the given date, the employee's civil service position is Secondment in the initial record. If this is not the case, an error message appears, and you must record the secondment in the initial record.

See Also

[Chapter 5, "Updating Employee Records," Managing Civil Service Positions, page 87](#)

[Chapter 4, "Hiring French Public Sector Employees," page 53](#)

Ending or Returning from Secondment

This section describes how to:

- Update records for received employees.
- Update records for sent employees.

Updating Records for Received Employees

The end of secondment in a host organization implies the end of the employee's records in the organization.

To end secondment for received employees:

1. Access the Civ Serv Posit. - Overall Data page in the Chg Civil Service Position FPS component.
2. Select a terminating type of event.

See Also

Chapter 5, "Updating Employee Records," Managing Civil Service Positions, page 87

Updating Records for Sent Employees

When employees return from secondment, their civil service positions in the home organization change.

To process returning employees:

1. Access the Civ Serv Posit. - Overall Data page.
2. Select an action.
3. Access the Civil Service Position page.
4. Select None in the Secondment group box.

See Also

Chapter 5, "Updating Employee Records," Managing Civil Service Positions, page 87

Managing Contributions for Employees on External Secondment

This section provides an overview of the contribution share calculation and secondment period modifications, lists prerequisites, and describes how to:

- Identify and calculate deductions.
- Edit call letters.

Understanding Contribution Share Calculation

The share equals the rate multiplied by the contribution basis.

The contribution basis is expressed by the following formula:

$$\text{Contribution basis} = \frac{\text{Increased index} \times \text{Point value}}{\text{Employee proration ratio in the host organization}} \Rightarrow$$

A secondment proration ratio is determined from the secondment work time percentage. It depends on civil service position and work time percentage.

If an employee is in a step, the contribution basis takes into account:

- The increased index (deducted from gross index) in the home organization.
- The point value in the home organization.
- The secondment proration ratio.

If an employee is in a substep, the contribution basis takes into account:

- The annual compensation associated with the scale-letter / substep in home organization.
- The secondment proration ratio.

Understanding Secondment Period Modifications

A semester can be divided in several periods within the semester dates or limited by an event associated with one of the following elements:

Event Impact Type	Events That Might Require Dividing the Semester
Secondment start or end date.	Modification of civil service position.
Modification of the employer contribution rate.	Modification of the employer rate value.
Modification of the employee contribution rate.	Modification of the employee rate value associated with a status.
Modification of the contribution basis.	• Modification of the increased index. • Modification of the point value. • Modification of the annual compensation value associated with a scale-letter / substep. • Modification of the secondment work time percentage.

Calculations are on a thirtieth pro rata basis and are rounded down to the nearest euro.

The system determines the employee contribution amount for a semester by compiling the results of each semester elementary period. The results for each period and the total semester are stored.

Prerequisites

Before you calculate secondment contributions, you must define the host organization, the status/population codes, the employer rate, and the secondment itself. You must leave the Job Leads to Civil Pension check box cleared and assign a title number on the Secondment Information page.

To set up secondment contributions:

- Define the host organization using the Type of Organization, Sub-Types of Organization, and Organizations pages to define host organization types and subtypes, and the organizations themselves.

- Link contribution rates and statuses by associating an employee contribution rate code with each status on the Status/Population Codes page.
- Define the employer rate contribution by defining the actual employer contribution rate value on the Employer Contribution Rate page.
- Run the merge process between French Public Sector (FPS) and PeopleSoft Human Resources data.

See Also

[Chapter 3, “Setting Up French Public Sector Tables,” Defining Status and Population Codes, page 10](#)

[Chapter 15, “Managing Secondment,” Setting Up External Secondment, page 159](#)

[Chapter 15, “Managing Secondment,” Setting Up Internal Secondment, page 161](#)

[Chapter 16, “Merging French Public Sector and PeopleSoft Human Resources Files,” page 167](#)

Pages Used to Manage Contributions for Employees on External Secondment

Page Name	Object Name	Navigation	Usage
Contribution Calculation	RUNCTL_FPA1100	Workforce Administration, Collective Processes, Calculate Contribution FPS	Identify and calculate employee contributions.
Payment Contribution Summary Table	FPACNTRBTOT_PNL	Workforce Administration, Collective Processes, Review Payment Cont FPS	View the employees liable to contribute for civil pension for a given semester and indicate whether the contributions have been paid.
Call Letters	RUNCTL_FPA1150	Workforce Administration, Collective Processes, Contribution Call Letter FPS	Edit call letters.

Identifying and Calculating Deductions

Access the Contribution Calculation page in correction mode.

Contribution Calculation page

- | | |
|--|--|
| Start Date and End Date | The end date is automatically set to six months after the start date, but you can modify this date. |
| ID and Empl Rcd Nbr
(employee record number) | Enter one or both. When left blank, the system calculates all employees' contributions. |
| Checking Start Date | The system checks that no retroactive modifications affect existing calculations between the check start date and the semester start date. By default, the period checked is 10 years. |
| Info From FPS | Select to import required data from the home organization. |

Click Run. The system identifies employee deductions by employee ID, semester, title number, and sequence number.

Editing Call Letters

Access the Call Letters page in correction mode.

Call letters are those elements on the settlement/payment record that define the employer and employee contribution shares. Contribution call letters contain the employee's address and the contribution amounts. You must run the FPA1100 SQR before editing call letters.

To edit call letters:

1. Enter the employee ID and record number.
2. Enter the start and end dates. These dates define the edit period.
3. Run one of the following Crystal reports:
 - FPACNTR: edit call letters for the employee share.
 - FPACNTR2: edit call letters for the employer share.

CHAPTER 16

Merging French Public Sector and PeopleSoft Human Resources Files

This chapter provides an overview of the merge process between French Public Sector (FPS) and PeopleSoft Human Resources and discusses how to:

- Execute the merge.
- View the merged records.

Understanding the Merge Process

The merge process provides an interface between French Public Sector and various PeopleSoft Human Resources business processes such as training. This process is mandatory.

As soon as the personnel manager completes the first step in the FPS hiring process, the pre-hired employee is available in all PeopleSoft Human Resources components except those listed on the Prehire Unauthorized Component page.

If an employee is transferred from one department to another, the effect on PeopleSoft Human Resources security begins for the non-FPS components only after the merge is executed.

The merge process consists of feeding and updating the standard JOB, JOB_JR, and COMPENSATION tables (job data) with various French Public Sector tables. The system considers only actual actions, not requests. The merge process is possible only after the hire is validated.

Each event in the employee record corresponds to a move in the merged record. When the same event, which has the same action and effective date, appears in various parts of the employee record, only one row is created in the merged record.

When two events have been registered in two different parts of the record on the same date, the process generates two rows in the merged record.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Denying Component Access to Employees Whose Hirings Haven’t Been Validated, page 49

Prerequisites

Before you can execute the merge process, you must establish links between FPS action codes and PeopleSoft Human Resources action codes. You establish these links on the Equivalent Job Action page.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Associating Your Action Codes With PeopleSoft Action Codes, page 23

Executing the Merge

There are three SQR processes to merge data:

- FPA0501 updates the JOB, JOB_JR, and COMPENSATION tables for a particular employee ID and employee record number.

You start this process manually.

- FPA0503 updates the JOB, JOB_JR, and COMPENSATION tables for all employee IDs and record numbers that have been modified since the last update according to the following guidelines:
 - If a row is deleted in the employee record, the record is stored by the hiring date.
 - If there are only updates and creations, the record is reconstituted from the earliest effective date.

It is recommended that you run this process each night. You must schedule this process.

- FPA504 processes the merge for all employee IDs and record numbers.

This process is delivered by PeopleSoft and can be run using sqrw.exe. Run this process once before going live to create JOB data.

This section discusses how to run FPA0501 to merge data for a specified employee and record number.

Pages Used to Execute the Merge

Page Name	Object Name	Navigation	Usage
Merge Process - Empl Rcd (merge process - employee record)	RUNCTL_FPA50X	Workforce Administration, Job Information, Merge Employee Record FPS	Run FPA501 to merge data for a specified employee ID and record number.
Merge Process - All	PRCSRUNCNTL	Workforce Administration, Collective Processes, Merge All Employee Records FPS	Run FPA503.

Merging Data for a Specified Employee ID and Record Number

Access the Merge Process - Empl Rcd page.

Merge Process - Empl Rcd

Run Control ID: FPS01 [Report Manager](#) [Process Monitor](#) **Run**

Language: English ▼

Run Parameters

As Of Date: 11/11/2002 

ID: SFC8004  CLAUTERET, Stacy

Empl Rcd#: 1

Merge Process - Empl Rcd page

Select the date and employee ID.

The date that you select enables the system to select and merge all actions with effective dates that are later than or equal to the selected date. To merge the entire career of an employee, enter a date that is earlier than or equal to the hire date.

Viewing Merged Records

At the end of the merge process, you can view a synopsis of the employee record and the merged result.

Pages Used to View Merged Records

Page Name	Object Name	Navigation	Usage
Job Data - Career	FPAJOB_SUM1	Workforce Administration, Job Information, Review Job Information, Job Data FPS, Job Data - Career	View an employee's career information.
Job Data - Assignment	FPAJOB_SUM2	Workforce Administration, Job Information, Review Job Information, Job Data FPS, Job Data - Assignment	View an employee's assignment information.
Job Data - Compensation	FPAEESCP_PNL	Workforce Administration, Job Information, Review Job Information, Job Data FPS, Job Data - Compensation	View an employee's compensation information.
Job Data	FPAJOB_SUM4	Workforce Administration, Job Information, Review Job Information, Job Data FPS, Job Data	View an employee's job data information.
Job Data History 1	FPAJOB_SUM_PNL	Workforce Administration, Job Information, Review Job Information, Job Data History FPS, Job Data History 1	View an employee's career history derived from all the merged records.
Job Data History 2	FPAJOB_SUM2_PNL	Workforce Administration, Job Information, Review Job Information, Job Data History FPS, Job Data History 2	View an employee's career history derived from all the merged records.
Merge Process Results	FPA_CI_RSLT_PNL	Workforce Administration, Collective Processes, Review Merge Results FPS	View the merge process results.

CHAPTER 17

Managing Headcount

This chapter provides an overview of budgetary headcount and discusses how to:

- Set up the headcount management system.
- Manage the commitment accounting entity.
- Book CAE with an insufficient margin.
- Calculate the workforce.

Understanding Budgetary Headcount

Every year, the Finance Act determines the administrative budget, which contains the headcount for the next budget year. The headcount is allocated by grade. The Manage Budget Headcount business process helps you supervise how the budget is used.

Common Terms in This Chapter

Commitment Accounting Entity Category

The Finance Act is composed of budget lines. Some lines allocate a given number of employees per grade or grade group. The grade or grade group described in a single budget line is called the Commitment Accounting Entity Category (CAEC). The CAEC represents the most refined level at which the organization monitors headcount. Headcount is expressed in whole numbers.

Commitment Accounting Entity

The CAE is a budget position ratio associated with one employee during a limited period. The CAE is described by the employee ID, employee record number, CAEC corresponding to the employee grade, employee proration ratio, and CAE start date.

Once hired, an employee is assigned a CAE. The CAE is active as long as:

- The employee has a civil service position implying budget attendance. Thus the employee is not active when terminated or on leave.
- The employee's successive grades are all in the same CAEC.
- The employee's work time percentage doesn't change.

Both work time percentage changes and grade promotions associated with a CAEC change imply a CAE reallocation.

Setting Up the Headcount Management System

This section describes how to:

- Set CAE controls.
- Enter the budget line for each CAEC.
- Associate a grade with a CAEC.
- Record Finance Act details.
- Enter budgeted headcount.
- Calculate authorized budgeted headcount from budgeted headcount.
- Calculate authorized headcount management and manage hiring freezes.
- Lock in CAECs.
- Distribute budgeted headcount to administrative structures.

Pages Used to Set Up the Headcount Management System

Page Name	Object Name	Navigation	Usage
CAE Category	FPM_CA_CTG_PNL1	Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, CAE Category, CAE Category	Enter the budget line information for each CAEC.
CAEC Composition	FPM_CA_CTG_PNL2	Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, CAE Category, CAE Composition	Associate a grade with a CAEC.
Finance Act Definition	FPMFINLAWB_PNL1	• Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Fact with BL on Request, Finance Act Definition • Workforce Administration, Headcount FPS, Define Headcount Data, Fact with BL on Request, Finance Act Definition	Record the details of the Finance Act, including the Initial Finance Act and any amendments.

Page Name	Object Name	Navigation	Usage
Budget Lines	FPMFINLAWB_PNL2	- Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Fact with BL on Request, Budget Lines - Workforce Administration, Headcount FPS, Define Headcount Data, Fact with BL on Request, Budget Lines	Enter budget line data, including budgeted headcount, for each CAEC.
Locking ins	FPMFINLAWB_PNL3	- Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Fact with BL on Request, Locking ins - Workforce Administration, Headcount FPS, Define Headcount Data, Fact with BL on Request, Locking ins	Lock in headcount on one CAEC to overstaff another CAEC.
From BH to BHA	FPMFINLAWC_PNL1	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, From BH to BHA - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, From BH to BHA	Calculate the authorized budget headcount from the budgeted headcount.
From BHA to AHM	FPMFINLAWC_PNL2	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, From BHA to AHM - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, From BHA to AHM	Calculate the authorized headcount management from the authorized budgeted headcount.

Page Name	Object Name	Navigation	Usage
Control Panel - 1	FPMFINLAWC_PNL3	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, Control Panel - 1 - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, Control Panel - 1	View a summary of headcount and recorded moves by CAEC.
Control Panel - 2	FPMFINLAWC_PNL4	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, Control Panel - 2 - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, Control Panel - 2	Retrieve the AHM and all mass and transaction freezes. View usable headcount.
Control Panel - 3	FPMFINLAWC_PNL5	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, Control Panel - 3 - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, Control Panel - 3	View actions captured in employee records and each action's impact. Updated automatically if the CAE control is activated.
BHAD	FPADPTCAHDCNT_PNL	Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budgeted Headcount AD	Distribute headcount between departments.
CAEC/Grade	FPM_CA_CTG_RK_PNL1	Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, CAEC / Grade	View the CAECs to which a grade belongs.

Page Name	Object Name	Navigation	Usage
Budget Line View - From BH to BHA	FPMFINLAWC_PNL1	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, From BH to BHA - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, From BH to BHA	View transfers of budgeted headcount that result in authorized budget headcount.
Budget Line View - From BHA to AHM	FPMFINLAWC_PNL2	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, From BHA to AHM - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, From BHA to AHM	View lock-ins of authorized budgeted headcount that result in authorized headcount management.
Budget Line View - Control Panel - 1	FPMFINLAWC_PNL3	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, Control Panel - 1 - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, Control Panel - 1	View a summary of headcount and recorded moves by CAEC.
Budget Line View - Control Panel - 2	FPMFINLAWC_PNL4	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, Control Panel - 2 - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, Control Panel - 2	Retrieve the AHM and all mass and transaction freezes. View usable headcount.

Page Name	Object Name	Navigation	Usage
Budget Line View - Control Panel - 3	FPMFINLAWC_PNL5	- Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, Control Panel - 3 - Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, Control Panel - 3	View actions captured in employee records and each action's impact. Updated automatically if the CAE control is activated.

Setting CAE Controls

CAE management is optional. To automatically update the CAE when you modify employee records, activate the CAE Control flag in on the FPS Installation Parameters 1 page. You must activate it when setting up PeopleSoft HR French Public Sector. When the CAE Control check box is selected, the Last CAE Number field displays the last number assigned.

If the CAE Control flag is activated, an employee with a career path is assigned one CAE as long as he or she has a civil service position implying budget attendance.

To define attendance for each civil service position:

1. Access the Civil Service Position Definition page.
2. Select the Attendance type.

This setup enables you to calculate civil service position and budget headcount as well as potential full-time equivalents (PFTes). If the Budget check box is selected, employees need a CAE for this civil service position.

Note. If an employee transfers from a civil service position that has the Budget check box selected to a civil service position that has the Budget check box cleared, the CAE related to the old position is deallocated.

The budget position ratio of a budgeted employee is the proration ratio applied to the main compensation.

To define the proration ratio for a civil service position:

1. Access the Proration Ration page.
2. Enter the ratios associated with each work time percentage.

See Also

[Chapter 3, "Setting Up French Public Sector Tables," Setting Up FPS Installation Parameters, page 27](#)

[Chapter 3, "Setting Up French Public Sector Tables," Defining Civil Service Positions, page 12](#)

Entering the Budget Line Definition for Each CAEC

Access the CAE Category page.

CAE Category **CAEC Composition**

SetID: SF001 **CAE Category:** SF0001

CAEC Definition - Budget Line Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980 ***Status:** Active

***Description:** Employee

Long Description: Employee

Budget Line

***Economy Code:** 112

***Title:** 31 **Part:** 41 ***Article:** 02 **Paragraph:** 11

Chapter: 31-41

CAE Category page

Chapter The system populates this field once you enter the title and part.

Associating a Grade With a CAEC

Access the CAEC Composition page.

CAE Category **CAEC Composition**

SetID: SF001 **CAEC:** SF0001

Grades in CAEC Find | View All First 1 of 1 Last

Description: Employee

Effective Date: 01/01/1980 **Status:** Active

Highest and Lowest Index Avg:

	*Grade	Description
1	SFG001	Employee of Service

CAEC Composition page

Highest and Lowest Index Avge (highest and lowest index average) Enter the average of the highest and lowest indexes of the grade.

Grade Enter a grade list, depending on the CAEC setID. You can view the relationship between CAECs and grades on the CAEC/Grade page. If a grade has been associated with different CAECs, the system displays all the CAECs.

Recording Finance Act Details

Access the Finance Act Definition page.

Finance Act Description page

The first row in the Finance Act Definition group box is the Initial Finance Act; the effective date is January 1st. The type of event must be *Initial*. Amendments to the initial act can occur any time during the budget year.

Sequence Enables you to record several instances in the FA on the same date.

Budgeting Enter the year taken into account by the FA. The budget year of the effective-date year is used as the default value.

Type of Event Enter the event qualifying the FA update. Amendments introduced to the FA result from an order or an internal move, or a rectification of the act.

Description Describe the FA modifications.

Entering Budgeted Headcount

Access the Budget Lines page.

Finance Act Definition | **Budget Lines** | Locking ins

Section: TR **Finance Act:** SF2002

Finance Act Find | View All First 1 of 1 Last

Effective Date: 02/01/2002 **Sequence:** **Type:** Internal Move **Status:** Stamped + -

Customize | Find | View All First 1-4 of 4 Last

Budgeted Headcounts | Fin.Act Moves | Used/Booked CAE | Exceptions

	Details	*SetID	CAEC	Description	CAE Margin	BH	BHA	AHM			
1	Details	SF001	Q	SF000	Q	Employee	47.00	45.00	55.00	50.00	+ -
2	Details	SF001	Q	SF000	Q	Administrative Employee	24.00	18.00	28.00	28.00	+ -
3	Details	SF001	Q	SF000	Q	Technician	25.00	30.00	25.00	25.00	+ -
4	Details	SF001	Q	SF000	Q	Administrative Secretary		7.00	7.00		+ -

Budget Lines page

Enter the budgeted headcount, budget line by budget line. Each budget line (BL) is identified by a CAEC. Use the tabs to view additional budget data populated from the Budget Line Details component.

To describe the position creations or deletions that affect a CAEC, click the corresponding Detail button. The Budget Line Details component you access contains 5 pages.

CAE Margin

The CAE margin equals the used headcount minus the CAEs booked (stamped or not), allocated, or locked in.

Calculating Authorized Budgeted Headcount from Budgeted Headcount

Access the From BH to BHA page.

From BH to BHA | From BHA to AHM | Control Panel - 1 | Control Panel - 2 | Control Panel - 3

Section: TR Finance Act: SF2002

Finance Act Find | View All First 1 of 3

Effective Date: 02/01/2002 Sequence: Type: Internal Move Status: Stamped

SetID: CAEC:

Budget Hdcount: 1.00 Moves BH/BHA: 1.00 Carry Over:

Sign	*Type of Move	Move	Text
1 Plus	External Transf	1.00	

Customize | Find | View All | First 1 of 1 Last

Return

BHA: 2.00

From BH to BHA page

Type of Move

Types include potential budget overstaffing, locking in, or transfers. These moves result from an order or a rectification of the FA.

Move

Enter the number of budgeted positions. If the number is negative, include the negative sign. This updates the Sign field.

Text

Enter any comments.

Return

Click to return to the Budget Lines page and view all the CAECs.

The system compiles the moves, stores the total in the Moves BH/BHA field, and adds the total to the budgeted headcount (BH) to create the authorized budget headcount (BHA). If the same type of move has been previously recorded, the carry over is calculated and displayed.

Calculating Authorized Headcount Management and Managing Freezes

Access the From BHA to AHM page for the correct CAEC.

From BH to BHA | **From BHA to AHM** | Control Panel - 1 | Control Panel - 2 | Control Panel - 3

Section: TR Finance Act: SF2002

Finance Act Find | View All First 1 of 3

Effective Date: 02/01/2002 Sequence: Type: Internal Move Status: Stamped

SetID: CAEC: BHA: 2.00 Moves BHA/AHM: 1.00 Carry Over:

CAE Locked in: Overstaff Authorized: Return

Sign	Type of Move	Move	Text
1 Plus	Locking ins	1.00	

AHM: 3.00

Transact Freeze: Mass Freeze:

From BHA to AHM page

You must have previously calculated the BHA on the From BH to BHA page; many of the fields on this page are similar to the From BH to BHA page. The moves entered in this page are internal decisions.

Mass Freeze Enter the mass freeze number.

Transact Freeze (transaction freezes) The system derives this value from the freeze percentages applied when an employee leaves. The system calculates effective headcount by subtracting total freezes from AHM.

The system compiles the moves, stores the total in the Moves BHA/AHM field, and adds the total to BHA to create AHM. If the same type of move has been previously recorded, the carry over is calculated and displayed. The system also displays authorized overstaffing or locked-in CAE. CAE lock-ins might be made by a headcount manager after an employee is hired, returns from leave, or is granted a promotion.

See Also

Chapter 17, “Managing Headcount,” Booking CAE With an Insufficient Margin, page 198

Locking In CAECs

Access the Locking ins page.

Locking ins page

If the margin of the CAEC corresponding to an employee grade is not sufficient when an employee is hired, returns from leave, or is granted a promotion, you can lock in the necessary proration ratio in another CAEC. This enables you to overstaff the CAEC. In theory, the average indexes of CAECs that can be locked in are higher than the overstaffed CAEC indexes.

Lock Order Assign a sequence to prioritize lock-ins.

Category Supporting Locking In Select the CAEC.

Locking Ins Renewal Select to extend the lock in.

Distributing Budgeted Headcount to Administrative Structures

Access the BHAD page.

BHAD

SetID: FRA01 **Department:** 10200 France Headquarters

Budgeted Headcount Assigned per Department Find | View All First 1 of 1 Last

Effective Date: 01/01/2002

	SetID	CAEC	Grade Group	Description	Budget Headcount		
1	SF001	SF000		Employee	30	+	-
2	SF001	SF000		Administrative Employee	13	+	-
3	SF001	SF000		Technician	21	+	-
4	SF001	SF000		Administrative Secretary	4	+	-

BHAD page

Determine the headcount allocated for each department by CAEC or grade group. To allocate by CAEC, enter the setID and the CAEC. To allocate by grade group, enter the grade group.

Note. Be sure that the budgeted headcount entered here is not greater than the CAEC usable headcount.

Managing CAE

This section provides an overview of CAE management and describes how to:

- Determine when CAE should be allocated.
- Prepare hires.
- Change budget attendance.
- Allocate CAE for new hires.
- Book CAE requests.
- Accept or deny CAE allocation requests.
- Delete CAE.
- Delete employee records.
- Request CAE deallocations.
- Accept or deny CAE deallocation requests.
- Change CAE.
- Prepare CAE changes.
- Deallocate active CAE.
- Accept or deny CAE change requests.

- Update counters.
- View information for a CAE and the related action to delete.
- Delete the move that implied the last CAE change.

Understanding CAE Management

You use CAE management to monitor how the organization uses budgeted headcount. CAE management is active only if you have activated the CAE Control flag when setting up PeopleSoft Human Resources French Public Sector.

The *available margin* is the number of opened headcounts in a given CAEC that the organization can use to hire or promote employees.

Actions That Affect the CAE

Three different types of actions affect the CAE:

- Hiring or return actions, which reduce the available margin and imply a CAE allocation.
- Leaves or terminations, which increase the available margin and imply a CAE deallocation.
- Grade changes (with CAEC change) and the work-time percentage changes implying a CAE change.

These actions entail the deallocation of the active CAE and the allocation of a new CAE.

Stamping and Validating Actions

For actions implying a change in budget attendance, the financial controller must stamp the CAE allocation or deallocation. Then the HR administrator must validate civil service position, grade, or work-time percentage moves to make changes effective in the employee record.

Each type of action must be validated. The process includes four successive steps, which can be made by different managers. The information is routed from one manager to the other via workflow.

To validate a CAE action:

1. Update the employee record: prepare the hiring, vacation, or grade change request, or the work time percentage change.
2. Allocate or deallocate CAE.
3. Obtain the financial controller's stamp.
4. Validate the action in the employee record.

See Also

Chapter 4, "Hiring French Public Sector Employees," Validating the Hiring Process, page 68

Pages Used to Manage CAE

Page Name	Object Name	Navigation	Usage
CAE Allocation	FPA_CA_CR_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation, CAE Allocation	Request a CAE allocation for a new hire.
CAE Booking	FPA_CA_CR_PNL2	Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation, CAE Booking	Book CAE requests.
Headcount Manager Rejection	FPA_CA_CR_PNL4	• Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation, Headcount Manager Rejection • Workforce Administration, Headcount FPS, Manage CAE, CAE Change, Headcount Manager Rejection • Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation, Headcount Manager Rejection	Reject CAE allocation requests. Used by headcount managers.
CAE Allocation Stamp	FPA_CA_STMP_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation Stamp, CAE Allocation Stamp	Accept or deny a CAE allocation request.
CAE Details	FPA_CA_STMP_PNL2	• Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation Stamp, CAE Details • Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation Stamp, CAE Details • Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation, CAE Details	View CAE data.
Delete CAE	FPA_CE_DENI_GRP	Workforce Administration, Headcount FPS, Manage CAE, Delete CAE	Delete CAE.

Page Name	Object Name	Navigation	Usage
Delete Employee Record	RUNCTL_FPA250	Workforce Administration, Job Information, Delete ID FPS	Delete employee records after a CAE is denied.
CAE Deallocation	FPA_CA_DS_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation, CAE Deallocation	Request a CAE deallocation for an employee.
CAE Detail	FPA_CA_STMP_PNL2	Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation, CAE Detail	View CAE data.
CAE Deallocation Stamp	FPA_CA_STMP_DS_PNL	Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation Stamp	Accept or deny a CAE deallocation request.
CAE Deallocation and Alloc (CAE deallocation and allocation)	FPA_CA_CHNG_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Change, CAE Deallocation and Alloc	Prepare CAE changes. View data for the new CAE allocation and launch the deallocation process.
Deallocation for Change	FPA_CA_CHNG_PNL4	- Workforce Administration, Headcount FPS, Perform Exceptional Allocation, CAEC Deallocation - Click Deallocate CAE on the CAE Deallocation and Allocation page.	Deallocate active CAE.
CAE Change Stamp	FPA_CACH_STMP_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Change Stamp	Accept or deny a CAE change request.
Counter Update	RUNCTL_FPA2050	Workforce Administration, Headcount FPS, Calculate Headcount, Update Counter	Update counters by deferred processing; launch FPA2050.
CAE Procedures State	FPA_CA_STATUS	Workforce Administration, Headcount FPS, Manage CAE, Procedures	View CAE status.
CAE 1	FPA_CA_DISP_PNL1	Workforce Administration, Headcount FPS, Manage CAE, Track CAE, CAE 1	View CAE data.
CAE 2	FPA_CA_DISP_PNL2	Workforce Administration, Headcount FPS, Manage CAE, Track CAE, CAE 2	View CAE data.
CAE/Employee	FPA_CA_BY_SC_PNL	Workforce Administration, Headcount FPS, Manage CAE, CAE/Employee Inquire	View CAE data by employee.

Page Name	Object Name	Navigation	Usage
CAEC Summary	FP_CA_CSB_PNL	Workforce Administration, Headcount FPS, Review Headcount, CAEC Summary	View all information for a CAE, including the employee to whom it is attributed, the status of the CAE, and the allocation date and stamp.
CAE Information	FPACAEDELETE_PNL1	Workforce Administration, Headcount FPS, Manage CAE, Delete CAE and Related Actions, CAE Information	View information for a CAE. Available information includes allocation dates, deallocation dates (if any), Finance act information, and lock in information.
Delete CAE and Job Data	FPACAEDELETE_PNL2	Workforce Administration, Headcount FPS, Manage CAE, Delete CAE and Related Actions, Delete CAE and Job Data	View the actions that implied the last CAE change and delete the corresponding moves.

Determining When CAE Should Be Allocated

The CAE uses a budget position ratio, equivalent to the employee proration ratio, in the CAEC corresponding to the employee grade. Only employees whose statuses authorize career data management are taken into account by the budget control.

Note. Activate the Budget Attendance flag on the Civil Service Position Definition page and the system tracks administrative situations needing CAE allocation.

A new CAE must be allocated when:

- An employee is hired into civil service position that implies budget attendance.
- An employee changes from a civil service position without budget attendance to a civil service position with budget attendance. (This can occur upon return from parental or disability leave.)

Preparing Hires

To prepare new hires for CAE allocation:

1. Access the Employee Record FPS component.
2. Enter values in the Section and Article fields on the Career - Classification page. This is mandatory.
 - If your organization includes several sectors, and if a Finance Act has been defined for each of them, indicate the section the employee is attached to, from the budget viewpoint. The sector corresponds to the FA Section.
 - To identify the budget line with a sufficient CAE margin to meet the employee hire, you must indicate if the employee is under the direction of the minister's office, central administration or decentralized departments. The data is equivalent to the article identifying a CAEC.
3. Continue the hire process as indicated in the Employee whose status allows career data area in the Hiring Employees section.

4. Save the employee record. A workflow process informs the manager that an employee has been hired and a CAE must be allocated.
5. Manually validate the hire once the CAE is booked and stamped.

See Also

Chapter 4, “Hiring French Public Sector Employees,” page 53

Changing Budget Attendance

When an employee changes civil service positions and returns to the budgeted headcount, the system launches a CAE allocation process.

To change budget attendance:

1. Access the Civil Service Position page on the Workforce Administration, Job Information menu.
2. Select *Request* for the action status.
3. Enter the request information.
4. The request can be validated and accepted only after the CAE is allocated, booked, and stamped. If the financial controller rejects the CAE stamp, you must delete the CAE and then the employee record.

See Also

Chapter 14, “Managing Requests,” page 153

Allocating CAE for New Hires

Access the CAE Allocation page.

CAE Allocation		CAE Booking		Headcount Manager Rejection	
EmplID:	SFCA008	Blangarin,Ludivine		Empl Rcd Nbr:	0
SetID:	SF001	Grade:	SFG003 Administrative Empl 2nd Class	Section:	Transport
CAE Category:	SF0002	Administrative Employee		Article:	Nat HQ
CAEC (Locking ins):					
CAE ID:	00000000010	Proration Ratio:	1.000	CAE Status: Booked	
Start Date:	06/01/2002	Appr Dt:	11/20/2002 	Expected End Dt:	
% Frzen Dealloc:	0	Re-used CAE:		Reuse Pro Ratio:	

CAE Allocation page

Once in receipt of the new hire, the manager must allocate CAE for the position. Allocating CAE confirms that there is ample headcount for the grade assigned to the employee being hired and creates a new CAE for the employee.

Employee ID, Empl Rcd Nbr (employee record number), Grade, Section, and Article	The system displays these values to help identify the CAE to be created.
CAE Category	The system retrieves the CAEC associated with the grade.
CAE ID	This system generates this value.
Proration Ratio	Display only. This ratio depends on the employee civil service position and work time percentage.
CAE Status	The value is <i>Booked</i> .
Appr Dt (approval date)	Enter the approval date.
Expected End Dt	Enter the expected end date, if known.
% Frzen Dealloc (frozen percentage at deallocation)	Corresponds to the CAE percentage that won't add up to the available margin at the CAE deallocation.

Booking CAE Requests

Access the CAE Booking page.

CAE Allocation		CAE Booking		Headcount Manager Rejection							
EmplID:	SFCA008	Blangarin,Ludivine		Empl Rcd Nbr:	0						
CAE Category:	SF0002	Administrative Employee		Proration Ratio:	1.000						
Section:	TR	Finance Act:	SF2002	Effective Date:	02/01/2002						
				Sequence:	Type: Intern Mve						
<table border="1"> <tr> <td colspan="2">Margin</td> </tr> <tr> <td>CAE Margin:</td> <td>23.00</td> </tr> <tr> <td>Potential Overstaffing:</td> <td></td> </tr> </table>						Margin		CAE Margin:	23.00	Potential Overstaffing:	
Margin											
CAE Margin:	23.00										
Potential Overstaffing:											
<table border="1"> <tr> <td colspan="2">Booking</td> </tr> <tr> <td>☒</td> <td>Yes</td> </tr> <tr> <td>☐</td> <td>No</td> </tr> </table>						Booking		☒	Yes	☐	No
Booking											
☒	Yes										
☐	No										
BH:	18.00	BHA:	28.00	AHM:	28.00						
<table border="1"> <tr> <td colspan="2">Locked In Moves</td> </tr> <tr> <td>CAE Locked in:</td> <td></td> </tr> <tr> <td>Overstaff Authorized:</td> <td></td> </tr> </table>						Locked In Moves		CAE Locked in:		Overstaff Authorized:	
Locked In Moves											
CAE Locked in:											
Overstaff Authorized:											
				CAE Booked not Stamped:	1.00						
				CAE Booked and Stamped:	4.00						
				Allocated CAE:							

CAE Booking page

Margin These values are automatically populated. Compare the CAE margin here with the proration ratio at the top of the page.

Booking

If the available CAE margin is higher than the employee proration ratio, book the CAE by selecting Yes. The number of CAEs booked but not stamped increases with the proration ratio. The CAE margin is likewise reduced.

If the margin is lower than the proration ratio, you cannot access the Booking group box.

See Also

Chapter 17, “Managing Headcount,” Booking CAE With an Insufficient Margin, page 198

Accepting or Denying CAE Allocation Requests

Access the CAE Allocation Stamp page.

CAE Allocation Stamp page

Stamp Decision

Update the CAE status. The values are:

- *Stamped:* The CAE is booked and stamped, enter the CAE stamp date and the allocation stamp reference number. The system updates the Finance Act counters for the appropriate budget line and adds an entry on the personnel manager’s task list. The hire can be finalized.
- *Adjourned:* The CAE is adjourned and the system notifies the headcount manager.
- *Rejected:* The CAE is rejected and the system warns the headcount manager to delete the CAE.

Deleting CAE

Access the Delete CAE page.

Select the Delete CAE check box.

At the end of the transaction, the system modifies Finance Act counters. A new workflow item is routed to the personnel manager, who must store the deleted hiring record.

Deleting Employee Records

Access the Delete Employee Record page.

When a CAE request is denied and deleted for a new hire, you must delete the employee record.

Select the employee ID to delete, then run the process to delete and store the employee data.

See Also

Chapter 4, “Hiring French Public Sector Employees,” Deleting an Employee Hiring, page 72

Requesting CAE Deallocations

Access the CAE Deallocation page.

CAE Deallocation		CAE Detail		Headcount Manager Rejection	
EmplID:	SFCA002	Nuthall,Georges		Empl Rcd Nbr:	0
SetID:	SF001	CAE ID:	00000000002	CAE Status:	Booked Stamped
CAE Category:	SF0001	Employee			
CAE Cat Supporting Locking ins:					
Application Date:	03/01/2002	Actual End Dt:	05/31/2002		
CAE to be Allocated:		Deallocation Approval Date:	11/20/2002		
Re-used CAE:		Proration Ratio:	1.000		
Frozen Percentage at Deallocat:	0	Freeze Reason:			
De-allocate ☒					

CAE Deallocation page

When an employee changes civil service positions and the new civil service position is a leave or a termination, the change removes the employee from the budget headcount, and you must deallocate the assigned CAE.

Actual End Date Displays the effective date of the move recorded on the Civil Service Position page. It is the CAE deallocation date.

Frozen Percentage at Deallocat (frozen percentage at deallocation) Enter this value if part of the ratio is frozen.

De-allocate Select this check box.

Proration Ratio Displays the budget position ratio.

When you save the record, the system creates an addition to the personnel manager's task list.

See Also

[Chapter 17, "Managing Headcount," Changing Budget Attendance, page 188](#)

Accepting or Denying CAE Deallocation Requests

Access the CAE Deallocation Stamp page.

CAE Deallocation Stamp		CAE Detail	
EmplID:	SFCA003	Martin, Helene	Empl Rcd Nbr: 0
SetID:	SF001	CAE Category:	SF0002 Administrative Employee
CAE Cat Supporting Locking ins:			
CAE ID:	000000000008	Proration Ratio:	1.000
		CAE Status:	Stamped Deallocation
Stamp Info			
Dealloc Appr Dt:	08/23/2002	Actual End Dt:	07/31/2002
Decision Dt:	11/20/2002	Deallocation Stamp:	
De-allocation Stamp Decision			
☒ Stamped ☐ Adjourned ☐ Rejected			

CAE Deallocation Stamp page

De-allocation Stamp Decision

Update the CAE status.

Stamped: The CAE is approved and you enter the decision date and the deallocation stamp number.

Adjourned: The decision is adjourned (postponed) and the system notifies the personnel manager.

Rejected: The stamp is rejected and the system informs the personnel manager. The manager can then delete the civil service position change request.

See Also

[Chapter 14, "Managing Requests," page 153](#)

Changing CAE

You must change CAE when an action modifies the CAEC or the proration ratio.

Two transactions imply a CAEC change: a grade change request (with CAEC change) and a work time percentage change.

To change CAEC for a grade promotion:

1. Access the Increment Step/Promotion FPS component.
2. Enter the CAEC-altering data. Select Request for the action status.
3. Save the data. The system asks if a work time percentage change is planned in the same employee record on the grade change date.
4. Select Yes or No.
5. If you selected Yes, access the Working Time page.

When saving the request, the system enables you to process both requests (grade change and work time percentage change) at the same time.

6. If you selected No, the system asks the personnel manager to process the grade change request.

Note. If you change work time percentage without changing the grade, go directly to the Working Time page.

Preparing CAE Changes

Access the CAE Deallocation and Allocation page.

CAE Deallocation and Alloc		CAE Booking		Headcount Manager Rejection	
EmplID:	SFCA004	Barret,Nicolas		Empl Rcd Nbr:	0
SetID:	SF001	Grade:	SFG006 Technician of Lab. sup Class	Section:	Transport
CAE Category:	SF0006 Technician			Article:	Nat HQ
CAECat Sup:		Deallocate CAE		Dealloc CAE:	
CAE ID:	00000000010	Proration Ratio:	1.000	CAE Status:	Booked
Application Date:	06/01/2002	Appr Dt:	11/20/2002	Expectd End Dt:	
% Frzen Dealloc	0	Re-used CAE:		Reuse Pro Ratio:	

CAE Deallocation and Alloc page

Deallocate CAE

Click to access the Deallocation for Change page and deallocate active CAE.

After you deallocate the CAE, the Deallocate CAE ID appears, and the CAE approval date and CAE ID are updated.

% Frzen Dealloc (percent frozen deallocation) Corresponds to the CAE percentage that won't add up to the available margin at the CAE deallocation.

After you save the data, go to the CAE Booking page and book the CAE.

Deallocating Active CAE

Access the Deallocation for Change page.

Deallocation for Change			
EmplID:	SFCA004	Barret,Nicolas	Empl Rcd Nbr: 0
SetID:	SF001	CAE ID:	00000000004 CAE Status: Booked Stamped
CAE Category:	SF0002	Administrative Employee	
CAE Cat Supporting Locking ins:			
Application Date:	03/15/2002	Actual End Dt:	05/31/2002
CAE to be Allocated:		Deallocation Approval Date:	11/20/2002 
Re-used CAE:		Proration Ratio:	1.000
Frozen Percentage at Deallocat:	0	Freeze Reason:	
OK Cancel Apply			

Deallocation for Change page

Enter the deallocation approval date, and, if necessary, the frozen percentage at deallocation and freeze reason.

Accepting or Denying CAE Change Requests

Access the CAE Change Stamp page.

CAE Change Stamp

EmplID: SFC005 Devick,Rene Empl Rcd Nbr: 0

Customize | Find | View All | First 1-2 of 2 Last

Detail 1	Detail 2	Detail 2	Detail 3	Detail 4				
BL/Fin Act	CAE Category		SetID	CAE ID	Proration Ratio	Application Date		
1 BL/Fin Act	SF0002	Administrative Employee	SF001	00000000005	1.000	02/01/2002	+	-
2 BL/Fin Act	SF0006	Technician	SF001	00000000009	1.000	06/01/2002	+	-

Date of Decision: 11/20/2002

Allocation Stamp: SX34

Deallocation Stamp: XC21

Stamp Decision

☒ Stamped

☐ Adjourned

☐ Rejected

CAE Change Stamp page

Stamp Decision

Update the CAE status. Values are:

Stamped: The old CAE is stamped deallocated and the new CAE is booked stamped. Enter the allocation stamp and deallocation stamp references, if necessary.

Adjourned: The CAE is adjourned and the system emails the headcount manager.

Rejected: The CAE is rejected and you must cancel the existing CAE using the Delete CAE page.

BL/Fin Act

Click to view the budget line associated with the affiliated CAEC for the effective FA on the effective date.

Validating Grade Changes and Working Time

In the task list, the Grade Change Validation activity enables you to access the career and working time portion of the employee record, where you approve the grade promotion and/or work time change. If the stamp has been denied, the system issues an error message, and the grade or working time change request cannot be validated.

Updating Counters

Two procedures are used to update counters:

- Transactional updates

Each time a headcount manager or financial controller saves an action, the system updates the following counters: CAE Booked not Stamped, CAE Booked and Stamped, CAE De-allocated not Stamped, and CAE De-allocated and Stamped.

- Update by deferred processing

This process updates individual or all counters by request.

Both processes consider the effective dates and update CAE status from Booked to Active or De-allocated to Inactive as appropriate.

Transactional Update

For each transaction, the system first updates the counters associated with the active Finance Act. Then the counters consider the flows associated with the move of an employee.

Moves that affect CAEs and result in transactional updates are:

- Hiring preparations.
- Return preparations.
- Leaves.
- Promotions and demotions.
- Work time percentage changes.
- Financial controller stamps and rejections.

The flow is unweighted if the employee is 100% compensated. Its value is 1 for a budget entry or -1 for a budget absence. If the employee is not 100% compensated, the flow is weighted by the proration ratio.

Update by Deferred Processing

To launch this process:

1. Access the Counter Update page.
2. Enter the section and Finance Act.
3. Enter the as of date; otherwise, the system uses today's date.
4. To update a specific CAEC, enter its ID. Leave this field blank to process all CAECs.

The process also updates the CAE statuses. When the application date is reached, the status changes from Booked Stamped to Active. When the deallocation date is reached, the status changes from De-allocated Stamped to Deallocated.

The process also identifies two errors. When the application date is reached, CAEs Booked not Stamped become Booked Overdue not Stamped. When the deallocation date is reached, CAEs De-allocated no Stamped become De-allocated Overdue not Stamped.

Viewing Information for a CAE Before Deleting the Related Action

Access the CAE Information page.

CAE Information		Delete CAE and Job Data	
Marchand,Audrey		EmplID:	SFCA001
		Empl Rcd Nbr:	0
SetID:	SF001	Commitment Acctng Entity ID:	000000000001
CAE Category:	SF0001	CAE Status:	Stamped Deallocation
Allocation Info			
Approval Date:	08/13/2002	CAE Stamp Date:	08/13/2002
Application Date:	02/01/2002	Allocation Stamp:	VISA209M01
Deallocation Info			
Deallocation Approval Date:	08/19/2002	Date of Stamp Deallocation:	08/19/2002
Actual End Dt:	05/31/2002	Deallocation Stamp:	VISASFCA001
Finance Act Info			
Section:	Transportation	Finance Act:	SF2002
Initial Finance Act Date:	01/01/2002	Sequence:	
Lock In Info			
Re-used CAE:		CAE Margin CAECat Locked in:	
CAE to be Allocated:		CAE Cat Supporting Locking ins:	

CAE Information page

Once you have allocated CAE and the corresponding move (grade promotion, civil service position change, or working time change) has been approved, you cannot delete the move. However, in a certain cases, you may have to delete the move. You can delete the move only using the Delete CAE and Related Actions component.

When entering the Delete CAE and Related Actions component, the search box displays only the latest CAE for each employee, whether the CAE is booked, active, or deallocated.

This page displays information about the CAE, including:

- Allocation and deallocation approval dates, stamps, and stamp dates.
- Financial Act information for the CAE.
- Lock in information, if applicable.

The section Booking CAE With an Insufficient Margin defines the fields in the Lock In Info group box.

See [Chapter 17, “Managing Headcount,” Booking CAE With an Insufficient Margin, page 198.](#)

Deleting the Move That Implied the Last CAE Change

Access the Delete CAE and Job Data page.

CAE Information		Delete CAE and Job Data	
Marchand,Audrey		EmplID:	SFCA001
		Empl Rcd Nbr:	0
SetID:	SF001	Commitment Acctng Entity ID:	000000000001
Civil Service Position Info			
Effective Date:	06/01/2002		
Action:	SFG	Parental Leave	
Civil Service Position Code:	SF6	Parental Leave	
End Date:		Expected End Dt:	01/01/2003
Delete CAE			

Delete CAE and Job Data page

Delete CAE

Click to delete the CAE and the action related to the move.

If the move is:

- A hire, the system marks the CAE as deleted and deletes the emplID.
- A return (whether or not the return is associated with a grade and/or working time change), the system marks the CAE as deleted and suppresses the corresponding moves.
- A grade and/or working time change, the system marks the current CAE as delete and changes the end date of the previous CAE so that the employee is active under the previous CAE.

The system deletes the career and/or working time moves associated with the deleted CAE.

- Leave or termination, the system changes the CAE end date so that the CAE is active again and deletes the civil service position corresponding to the leave or termination.

Booking CAE With an Insufficient Margin

You may need to book CAE when the CAEC margin is either zero or less than the employee proration ratio. To allocate this CAE, you can prebook, lock in, or overstaff.

Before prebooking, locking in, or overstaffing, access the CAE Allocation page and enter the approval date and expected end date of the CAE you are booking.

This section discusses how to:

- Prebook.
- Lock in CAECs.
- End lock-ins for CAECs.

- Overstaff.

Pages Used to Book CAE With an Insufficient Margin

Page Name	Object Name	Navigation	Usage
CAE to be Deallocated	FP_AVLBL_CA_PNL	Workforce Administration, Headcount FPS, Perform Exceptional Allocation, Links Other CAE	Prebook or lock in CAE.
CAEC to be Locked in	FPM_CA_LCK_HDCNT	Workforce Administration, Headcount FPS, Perform Exceptional Allocation, CAEC Locking Ins	View CAECs that can support a lock-in and select a lock-in.
Unlock CAE	FPA_CA_OVF_RO_PNL1	Workforce Administration, Headcount FPS, Manage CAE, Reduction in Overstaff	End lock-ins for CAECs.

Prebooking

Access the CAE to be Deallocated page.

CAE to be Deallocated

SetID: SF001 **CAE Category:** SF0001 Employee

CAE Used:

Available CAE to be De-allocated						Customize Find View All
Link CAE Control	Locking in End Date	Proration Ratio	CAE ID	EmplID	Name	
1 ☐						+ -

CAE to be Deallocated page

The page displays all CAEs that:

- Belong to the same CAEC.
- Will be deallocated after today's date.
- Will be deallocated on the application date of the CAE you are processing.

Select the CAE to be reused in the Link CAE Control column. The system does not recalculate the margin. The selected CAE is considered reused CAE. The CAE being processed is considered CAE to be allocated.

If no deallocation is expected before the new CAE application date, you can lock in another CAE. To lock in, you check another CAEC's available margin and lock in the necessary budget position ratio. This generates an overstaffing in the CAEC with an insufficient margin. Select the Lock In CAEC button on this page.

Locking In CAECs

Access the CAEC to be Locked in page.

CAEC to be Locked in

SetID:SF001CAEC:SF0001Employee

Locking in CAEC

Find | View AllFirst1 of 1Last

Lock Order:Cat Sup Lock:

Effective Date:1st Use Dt:Locking in End Date:

Section:Finance Act:Type:

CAE Margin:Potential Overstaffing:

CAE Locked in:Nbr of CAE to Unlock:

Budgt Hdcount: BHA:AHM:Allocated CAE:

Locking in

☐ Yes

☒ No

CAE Category:

☐ Accept Overstaffing

CAEC to be Locked in page

This page displays the CAECs that can support a lock in.

Lock Order	This number determines the priority of CAECs to be locked in.
Locking In	When you have identified a CAEC with a sufficient CAE margin, select Yes. The category selected supports a lock-in while an Authorized Overstaffing is generated in the CAEC to be allocated.

Ending Lock-ins for CAECs

Access the Unlock CAE page.

Select End Lock In for those CAECs you want to unlock. The CAE Margin and Overstaff Authorized values are automatically updated. The associated CAE proration ratio is subtracted from both values.

Overstaffing

When pre-booking and locking in are not possible, you can generate a special overstaffing in the CAEC and create the CAE.

To overstaff:

1. Access the CAE Allocation page.
2. Enter the approval date, and expected end date, if known.
3. Access the CAE Booking page.

4. Click the Overstaffing button.

The system increases the number of Potential Overstaffing and CAEs Booked not Stamped by the value of the employee proration ratio. The financial controller must stamp the overstaffing activity. The system reduces overstaffing as soon as it is possible.

Calculating the Workforce

You can calculate your workforce on a monthly basis.

There are two main processes to calculate your workforce. The first process, FPA2000, displays its results on inquiry pages. The second process, FPA2001, can be used by external analysis tools.

Both processes apply the following rules:

- The headcount is determined for each month in the calendar year captured at the beginning of the process.
- Statutory headcount, budget headcount, WFTE (working FTE), and PFTE (paid FTE) are calculated at the same time, depending on the civil service position setup.
- An employee's civil service position at the end of the month determines its place in the calculation.
- Paid FTE values consider the employee proration ratios, which are determined by civil service positions and work time percentages.
- Employees at retirement age are not considered for headcount.
- If an employee's last civil service position is an interrupted position, the headcount calculations consider the position's expected end date.

Prerequisites

You must launch the Merge process before calculating the workforce.

See Also

[Chapter 16, "Merging French Public Sector and PeopleSoft Human Resources Files," page 167](#)

Pages Used to Calculate the Workforce

Page Name	Object Name	Navigation	Usage
Employees/Grade and Depart (employees/grade and department)	RUNCTL_FPA2000	Workforce Administration, Headcount FPS, Calculate Headcount, Employees/Grade and Dept	Launch the FPA2000 process. The process calculates the civil service position, budget workforce, and FTEs. The end of the month headcount is calculated by grade, corps, category, department, and gender.
Headcount Results 1	FPAHEADCNT01_PNL	Workforce Administration, Headcount FPS, Review Headcount, Headcount Results, Headcount Results 1	View FTEs by grade, gender and corps for a given year and department.
Headcount Results 2	FPAHEADCNT02_PNL	Workforce Administration, Headcount FPS, Review Headcount, Headcount Results, Headcount Results 2	View additional headcount data by grade, gender and corps for a given year and department.
Headcount Results 3	FPAHEADCNT03_PNL	Workforce Administration, Headcount FPS, Review Headcount, Headcount Results, Headcount Results 3	View additional headcount data by grade, gender and corps for a given year and department.
BHAS Inquire 1	FPACAHDCNT01_PNL	Workforce Administration, Headcount FPS, Review Headcount, BHAS, BHAS Inquire 1	View BHAS, headcount, department, CAEC, Structure, grade group by year, and department.
BHAS Inquire 2	FPACAHDCNT02_PNL	Workforce Administration, Headcount FPS, Review Headcount, BHAS, BHAS Inquire 2	View additional BHAS, headcount, department, CAEC, Structure, grade group data by year, and department.
FTE Calculation	RUNCTL_FPA2001	Workforce Administration, Headcount FPS, Calculate Headcount, Calculate FTE	Launch FPA2001. The system calculates physical workforce, WFTEs, paid FTEs, PFTEs, and indexical mass.

Glossary of PeopleSoft Terms

absence entitlement	This element defines 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	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. 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 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 pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	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.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	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].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. 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. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
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.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
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.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
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 a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
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.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft 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.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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