

PeopleSoft®

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Application Fundamentals for HRMS
PeopleBook

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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 Application Fundamentals for HRMS Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

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

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. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.

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.

PeopleBooks Standard Page Element Definitions

Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also Prefecture and Parish)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.

Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (employee record number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also Fax Number)	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2, or Telex.
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on.)
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the batch process runs. After the

batch process runs, the process frequency is automatically set to Don't Run. Always executes the request every time the batch process runs. Don't Run ignores the request when the batch process runs.

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

See Also

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

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

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

Entering Name Information

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

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

Person Name or Current Name

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

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

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

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

Royal Suffix

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

Name

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

Displaying Japanese Names on Pages

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

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

See .

Entering or Viewing Pay Components

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

See *PeopleSoft Human Resources PeopleBook: Administer Compensation*

Amounts Tab

Access the Amounts tab.

Pay Components									
Customize Find First 1 of 1 Last									
Amounts Changes Conversion									
	*Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	NAANNL	0	Details	52,000.000000	CAD	A			

Pay Components - Amounts tab

Rate Code

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

Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.

Seq (sequence)

The sequence number of the rate code if it is used more than once.

Details

Click the Details button to open the Comp Rate Code Secondary Panel page.

Comp Rate, (compensation rate) Currency, and Frequency

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

Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and de-annualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for Percent rate codes.
Points	The salary points associated with this rate code, if any.
Percent	If the rate code rate type is Percent, the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
Rate Code Group	A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.

Changes Tab

Access the Changes tab.

Pay Components									
Amounts		Changes		Conversion					
	*Rate Code	Seq	Manually Updated	Change Amount	Currency	Frequency	Change Points	Change Percent	
1	NAANNL	0	☒	0.000000	CAD	Annual		0.000	+ -

Pay Components - Changes tab

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

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

Conversion Tab

Access the Conversion tab.

Pay Components									
Amounts		Changes		Conversion					
	*Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate	Currency	Frequency	
1	NAANNL	0	Manual	☐	☐	1,000.000000	CAD	Weekly	+ -

Pay Components - Conversion tab

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

Source	The system displays the source of the rate code, such as Absorbing Premium, Seniority Pay, Job Code, or Manual.
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.

Apply FTE	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and de-annualization.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

CHAPTER 1

Getting Started With PeopleSoft HRMS

This chapter discusses:

- PeopleSoft HRMS integrations.
- PeopleSoft HRMS implementation tasks.

PeopleSoft HRMS Integrations

PeopleSoft HRMS is an integrated suite of applications and business processes. PeopleSoft HRMS also integrates with PeopleSoft’s other products, such as PeopleSoft Financials, and other third-party products. PeopleSoft HRMS uses various integration technologies to send and receive data.

PeopleSoft HRMS Implementation

PeopleSoft HRMS table-loading implementation includes setting up the following:

- Setting up fundamental tables.
- Setting up fundamental country tables.
- Setting up optional PeopleSoft HRMS application tables.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences. A complete list of these resources is in the PeopleSoft Human Resources preface, with information on where to find the most up-to-date version of each. This section includes tables that guide you through these phases.

Setting Up PeopleSoft HRMS Fundamental Tables

The information that you define in your fundamental tables lays the foundation for your PeopleSoft HRMS setup. Setting up these tables prepares your system to support all of the PeopleSoft HRMS applications you install.

Step	Reference
1. Set up implementation details for your installation such as indicating if you will use Multiple Jobs, Multiple Companies, and which countries and products you will need.	Chapter 10, “Installing PeopleSoft HRMS,” Setting Up Implementation Defaults, page 117

Step	Reference
2. Add business units, define TableSet sharing and set up system-wide defaults for your primary permission lists	- Chapter 3, “Understanding PeopleSoft HRMS System Data Regulation,” Implementing TableSet Sharing , page 24 - Chapter 11, “Setting Up Organization Foundation Tables,” Adding, Updating, and Identifying Business Units , page 145
3. Set up regulatory regions, if you require ones not delivered.	Chapter 10, “Installing PeopleSoft HRMS,” Setting Up Regulatory Regions , page 139
4. Define currency information.	Chapter 6, “Working With Currencies,” page 51
5. Update country information, if necessary.	Chapter 10, “Installing PeopleSoft HRMS,” Administering Country Codes , page 134
6. Assign a national ID type to a country code and provide a default or a dummy national ID for a country to use when an employee or applicant ID is unavailable.	Chapter 12, “Setting Up Personal Information Foundation Tables,” Defining National ID Types , page 210
7. Define a frequency ID, its frequency type, and its annualization factor.	Chapter 8, “Using Frequencies,” page 69
8. Define your legal entity types, locations, and company or agency information.	Chapter 11, “Setting Up Organization Foundation Tables,” page 145
9. Set system defaults such as Company, Country, and Currency for a specific SetID.	Chapter 11, “Setting Up Organization Foundation Tables,” page 145
10. Define information about a department.	- Chapter 11, “Setting Up Organization Foundation Tables,” Maintaining Departments , page 194 - Chapter 11, “Setting Up Organization Foundation Tables,” (USF) Setting Up Departments , page 202
11. Set up establishments.	Chapter 11, “Setting Up Organization Foundation Tables,” Defining Establishments , page 186
12. (USF) Set up federal fundamental tables.	Chapter 14, “(USF) Setting Up Human Resources Management Tables,” page 257
13. (USF) Set up the Work-in-Progress Management System.	Chapter 22, “(USF) Setting Up the Work-in-Progress Management System,” page 419
14. Set up bank and bank branch information.	Chapter 15, “Setting Up Banks and Bank Branches,” page 267
15. Defining salary increase guidelines, salary plans, and salary grades and steps.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries</i> , “Setting Up Plan Salaries”
16. Set up job function codes, job codes, and pay groups. Note. PeopleSoft Global Payroll uses different paygroups than the ones described here.	Chapter 13, “Setting Up Jobs,” page 219
17. Set up HRMS security.	Chapter 9, “Administering PeopleSoft Security,” page 87
18. Activate the workflows you will need.	Chapter 26, “Using PeopleSoft Workflow,” page 453

Step	Reference
19. (Optional) Activate Multiple Jobs and change benefits search views from a single job environment to a multiple job environment.	Chapter 7, “Working With Multiple Jobs,” page 57
20. Create rate code classes and rate codes.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Administer Compensation</i> , “Setting Up Administer Compensation”
21. Define rules-driven component defaulting.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Administer Compensation</i> , “Defining Compensation Rates and Rules-Driven Component Defaulting”
22. Set up vendor information, including bank information, payment options, and contacts, policy information if you are using HRMS applications that use vendor information.	Chapter 19, “Setting Up Vendors,” page 371
23. Define employee Action and Reason codes.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce</i> , “Setting Up the Administer Workforce Business Process,” Defining Duty Types and Reasons for Personnel Actions
24. Define checklist items and checklists.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce</i> , “Setting Up the Administer Workforce Business Process,” Creating Checklists
25. Define additional name information including types, titles, prefixes and suffixes.	Chapter 12, “Setting Up Personal Information Foundation Tables,” page 209
26. Define address types.	Chapter 12, “Setting Up Personal Information Foundation Tables,” page 209
27. Define citizen status	Chapter 12, “Setting Up Personal Information Foundation Tables,” page 209
28. Set up supporting documents for citizen status, and visa and permit data for non-citizens.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce</i> , “Setting Up the Administer Workforce Business Process,” Defining Additional Employment Data
29. Define labor unions and bargaining units.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations</i> , “Setting Up Labor Relations Data,” Setting Up Union Data
30. Define nonemployee provider types.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce</i> , “Hiring Your Workforce,” Defining a Nonemployee Provider
31. Define employment contract types and details.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations</i> , “Setting Up Labor Relations Data,” Defining Labor Agreements, Labor Agreement Categories, and Employee Classes

Setting Up PeopleSoft HRMS Fundamental Country-Specific Tables

The following table lists steps to define information in fundamental country-specific HRMS tables. Fundamental country-specific tables are specific to one country but are used across PeopleSoft HRMS.

Country-specific information can also be set up on some fundamental tables (described in the steps listed above) and some applications have their own country-specific tables (described in the steps listed in each application's Getting Started chapter).

Step	Reference
1. (CHE) Setup Swiss fundamental tables.	Chapter 16, "Setting Up Local Country Functionality," (CHE) Maintaining Swiss Postal Codes , page 277
2. (FRA) Setup French fundamental tables.	Chapter 16, "Setting Up Local Country Functionality," (FRA) Setting Up French Control Tables , page 278
3. (DEU) Set up German industrial inspection codes.	Chapter 16, "Setting Up Local Country Functionality," (DEU) Setting Up the German Control Table , page 282
4. (JPN) Set up Japanese fundamental tables.	Chapter 16, "Setting Up Local Country Functionality," (JPN) Setting Up Japanese Control Tables , page 284
5. (NLD) Import Dutch postal codes.	Chapter 16, "Setting Up Local Country Functionality," (NLD) Loading Dutch Postal Codes , page 289
6. (ESP) Set up Spanish fundamental tables.	Chapter 16, "Setting Up Local Country Functionality," (ESP) Setting Up Spanish Control Tables , page 290

CHAPTER 2

Using PeopleSoft HRMS

This section introduces you to some of the basic concepts used throughout PeopleSoft HRMS.

Understanding PeopleSoft HRMS

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

Using control tables:

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

This saves time and prevents data entry errors.

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

Setting Up Business Unit and SetID Functionality

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

See Also

Chapter 3, “Understanding PeopleSoft HRMS System Data Regulation,” page 9

Understanding Effective Dates

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

This requirement serves the following purposes:

- You can maintain a complete chronological history of your data and tables, whether you changed them two years ago or want them to change in two months. You can roll back your system to a particular time to perform analyses for your company. Or you can set up tables and data ahead of time: You don’t need a tickler file or a pending file to remind you to enter data in the future.
- The system compares pages and tables to make sure that prompt tables list only data that is valid as of the effective date of the page you’re working on. For example, you create a new department

code with an effective date of May 1, 1998. Then, on the Job Data pages, you enter a new data row for an employee with an effective date before May 1, 1998. When you select a department, you won't see the new code as a valid choice because it isn't in effect.

Driving Your System by Employee or Position

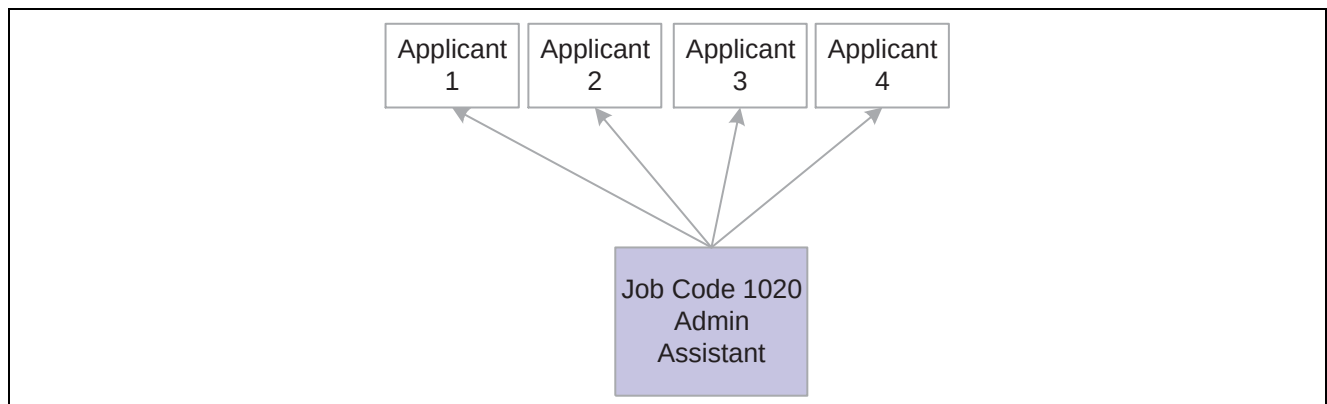
In PeopleSoft Human Resources, you can focus on either the employees in your company or the positions that they hold. Before you set up default information in the control tables, you must decide which method to use. The system processes the information differently depending on your choice.

What's the Difference?

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

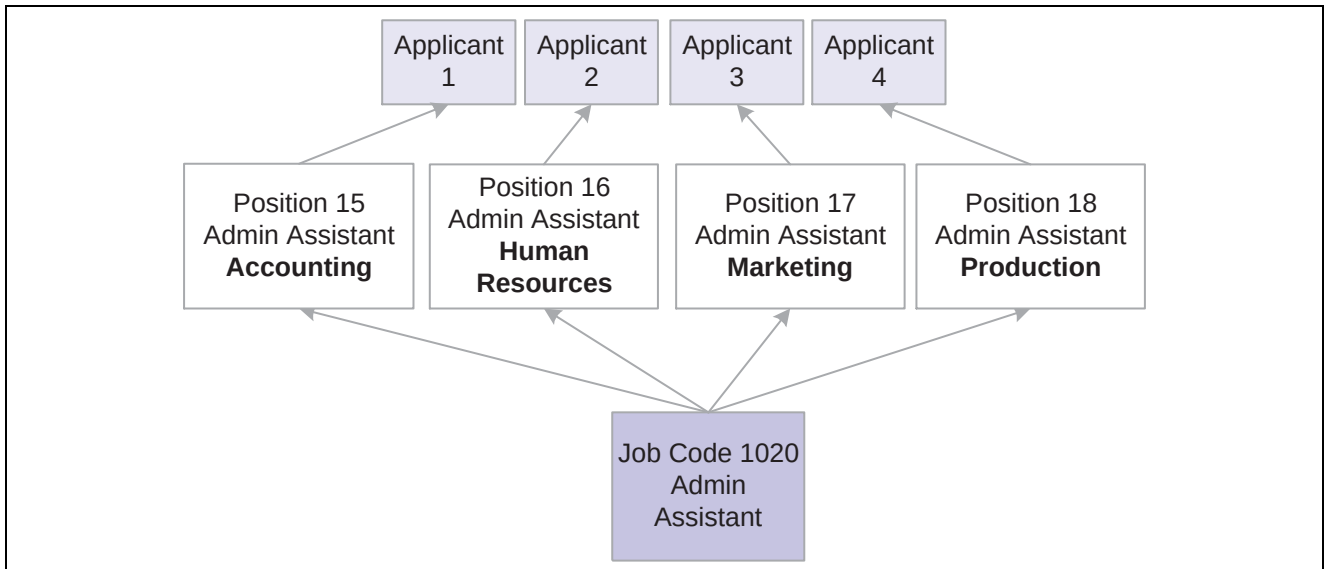
You can have several positions in the same job code; positions track details of a particular job in a specific department or location. For example, in job code 1020, Administrative Assistant, you can define different administrative assistant positions with different position numbers—one in your marketing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

In contrast, job codes primarily have a one-to-many relationship with employees. Many employees share the same job code, even though they might perform the work in different departments, locations, or companies. You identify the job that an employee performs through the data that you enter in the employee records.



Driving PeopleSoft Human Resources by employee

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



Driving PeopleSoft Human Resources by position

Why Does It Matter?

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

Which Method Should You Use?

Consider the following to determine whether you should drive your system by employee or position:

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

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

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

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

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

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

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

Considerations for PeopleSoft Pension Administration, Payroll, and Benefits

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions”

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

CHAPTER 3

Understanding PeopleSoft HRMS System Data Regulation

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

- Organize your businesses by dividing them into logical units, using business units and setIDs.
- Implement business units.
- Implement TableSet sharing.
- Link system defaults to your business units.

Understanding HRMS System Data Regulation

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

Business Units

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

TableSets and SetIDs

Once you've established business units, you can define TableSets, or groups of tables, for your system-wide control tables so that you can share the same code values among multiple business units within your enterprise. The TableSet feature also enables you to limit access to specific data to only those users who need it, while maintaining all of your data on the same tables. Sharing TableSets among business units enables you to centralize redundant information while keeping information such as department and job codes decentralized. You can use business units and TableSets to associate a business unit with employees in your enterprise and to specify how default values for currencies and country codes behave throughout PeopleSoft HRMS.

- TableSets

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- SetIDs

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

Before You Begin

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

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

Table	Location
TableSetID	PeopleTools, Utilities, Administration, TableSetIDs
Business Unit See Chapter 11, "Setting Up Organization Foundation Tables," Adding, Updating, and Identifying Business Units , page 145.	Set Up HRMS, Foundation Tables, Organization, Business Unit
Org Defaults by Permission List See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences , page 204.	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List
Business Unit Options See Chapter 11, "Setting Up Organization Foundation Tables," Setting Business Unit Defaults , page 150.	Set Up HRMS, Foundation Tables, Organization, Business Unit Options
Record Groups	PeopleTools, Utilities, Administration, Record Group
TableSet Control	PeopleTools, Utilities, Administration, TableSet Control

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

Determining Your Business Unit Structure

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

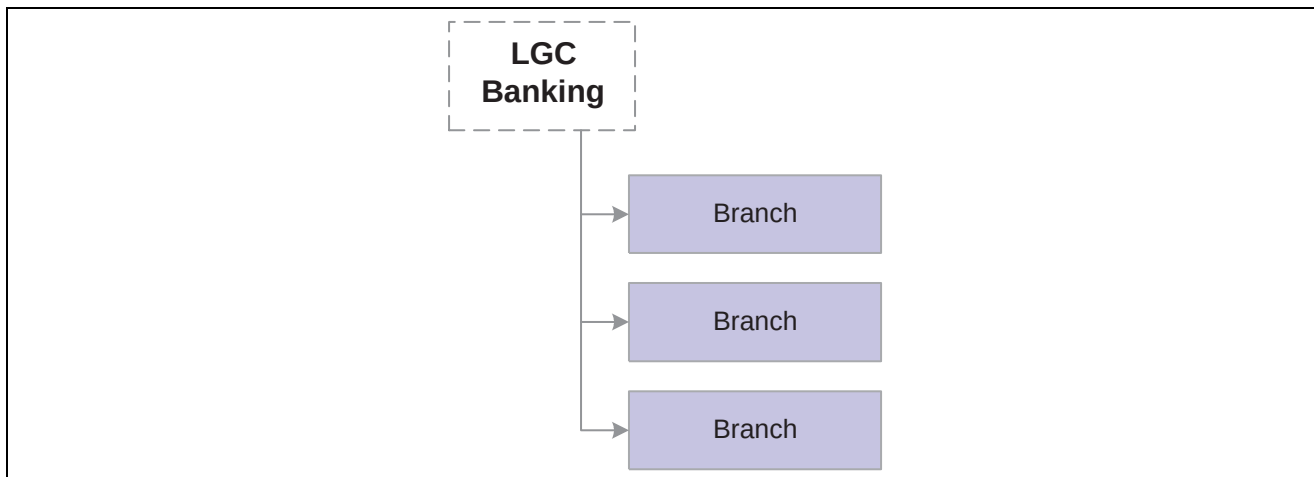
Your entire organization may have only one business unit, if every department uses the same processing rules. But multinational or otherwise diversified companies, such as those that have multiple cost centers, divisions, or subsidiaries, usually have multiple business units.

Each business unit's HRMS control table data, such as department codes, locations, job codes, positions, salary plans and so forth, are stored on the TableSet Record Group Control table, which is keyed by business unit. That way, the data from one business unit, although it exists in the same physical database table, is always segregated from that of other business units in the organization.

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

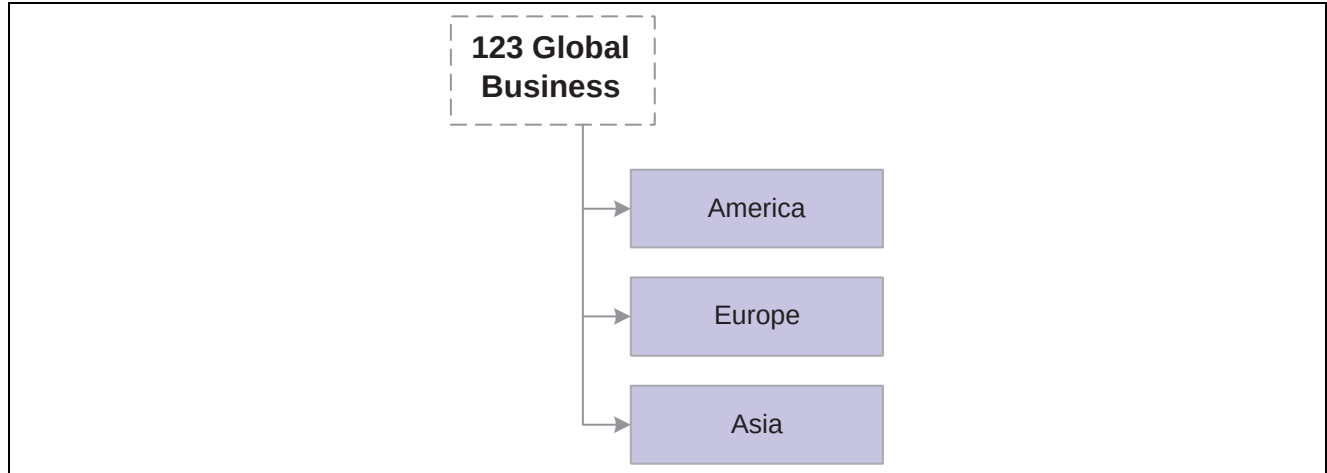
Defining a Business Unit

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



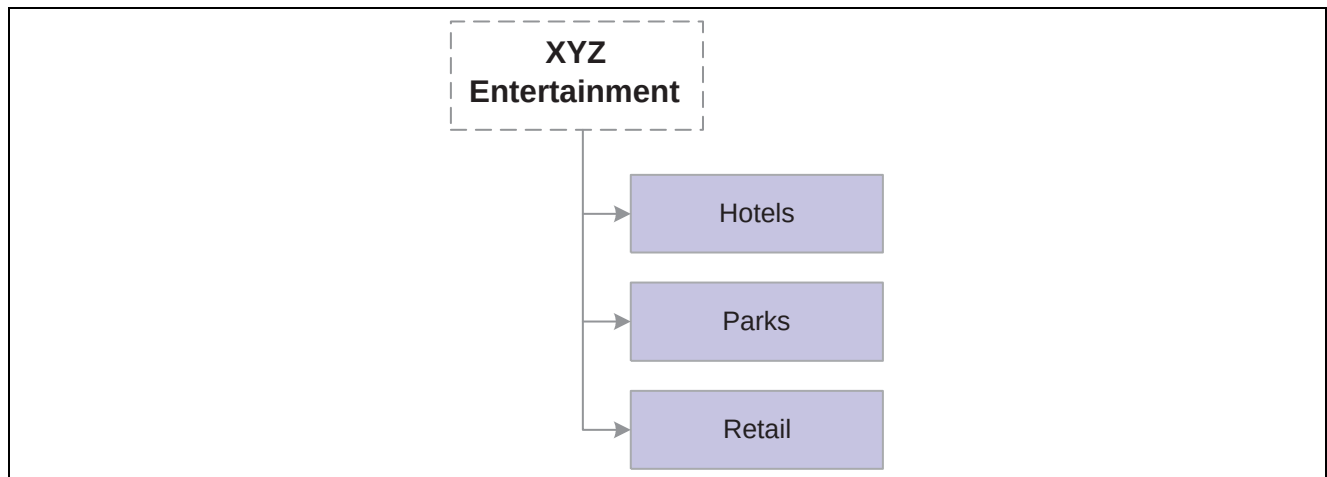
Identifying business units for a bank

Another example might be an organization that's global. Multinational companies might separate their operations geographically because of the necessities of conducting business abroad. What is more important to this organization may not be each office, but each location. What's happening in their American facility versus their European or Asian market? Then they can track their business requirements and business needs accordingly.



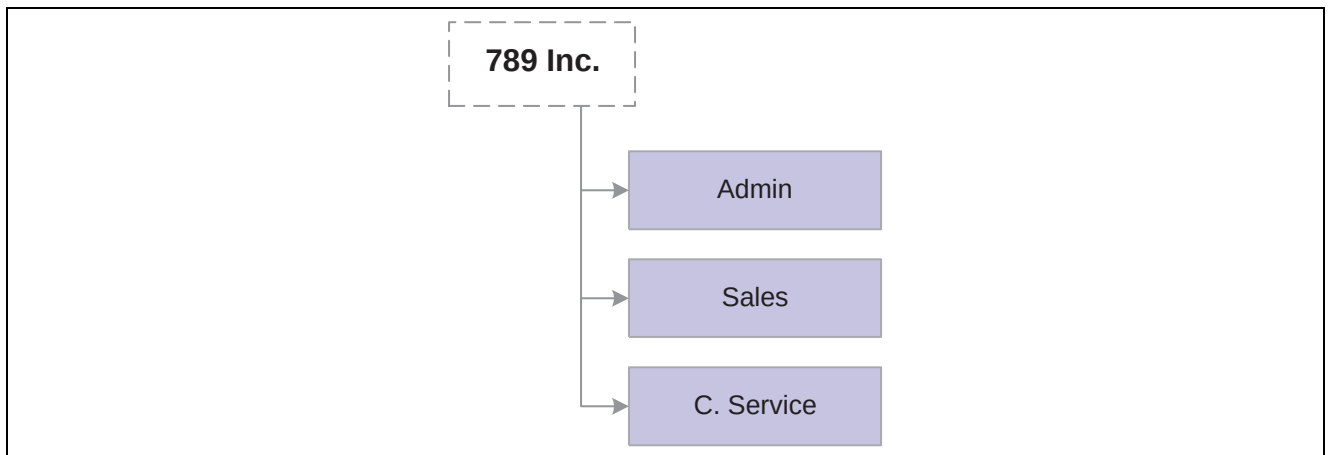
Identifying business units for a global organization

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



Identifying business units for an organization with subsidiary companies

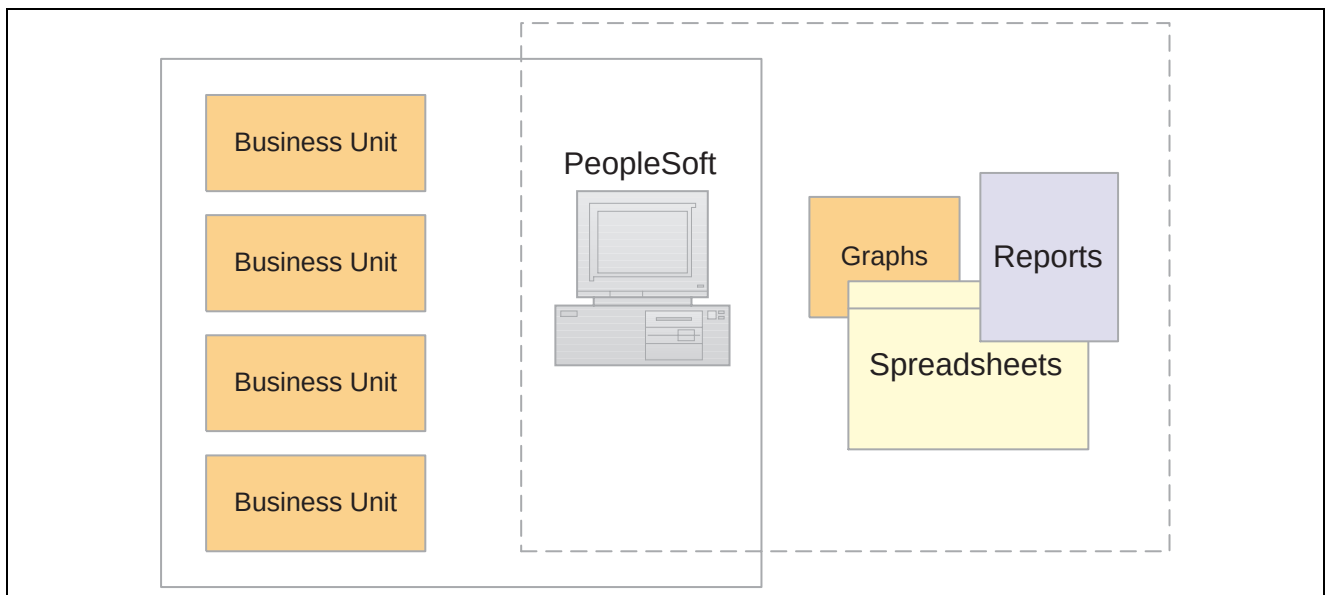
Some organizations may want to organize information by functionality or purpose, such as what's going on in Sales versus Customer Service. You can create business units that reflect the administrative needs of your human resources, benefits, and payroll departments.



Identifying business units by functionality

You can also use a combination of all of these methods. Business units don't necessarily have a restriction, although the more business units you establish, the more information you need to maintain. You do, however, need to have at least one business unit in the system. You have complete control over how you define business units in your PeopleSoft HRMS system, as well as how you use them to facilitate the handling of data in your data organization. For example, you could set up a business unit for each legal entity in your organization, all to be processed by a central human resources department that interfaces with and manages each business unit's information, employees, and processes. Alternatively, you could set up one business unit for each company, location, or branch office in your enterprise, enabling each unit to manage its own human resources information independently, while sharing data with a central, parent business unit.

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



Centralized data enables analysis and reporting across business units

Deciding on a PeopleSoft HRMS Business Unit Structure

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

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

As you work toward the optimal business unit structure for your organization, keep in mind that in some circumstances you must set up multiple business units to use certain options. On the other hand, there are circumstances in which you might choose to have multiple business units, even though you don't need to: Setting up multiple business units in such situations is optional.

Establishing Business Units - Points to Consider

When deciding how to establish business units for your PeopleSoft HRMS implementation, keep the following points in mind:

- With business unit functionality, you have another level for associating an employee with your company's organizational scheme.
- Business units are always associated with an employee's Job and/or Position record.
- There is no predetermined definition for a business unit as there is for a department and a company. You can implement this new organizational level as you determine its usefulness to your enterprise.
- A business unit isn't a legal entity, but a way of tracking specific business information for reporting and other rollup data collection.

See Also

[Chapter 3, "Understanding PeopleSoft HRMS System Data Regulation," Business Units and TableSet Sharing , page 24](#)

Why Implement Multiple Business Units?

While you have the option to build only one blanket business unit for your entire organization, establishing multiple business units can offer important reporting and data control options, as follows:

- Maintain a tree structure to facilitate organization-specific, rollup reporting.
- Distribute and administer certain control tables, such as the Department table or the Location table. For large or multinational companies, this feature of business unit functionality in PeopleSoft HRMS is useful for controlling data flow across different parts of the enterprise.

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

Questions to Ask Before You Implement

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

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

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

Understanding TableSets

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

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

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

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

You can also mix and match TableSets, by updating TableSet assignments for a business unit in the TableSet Controls component (Utilities menu).

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

See Also

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

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

Understanding the Relationship Between SetIDs and TableSets

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

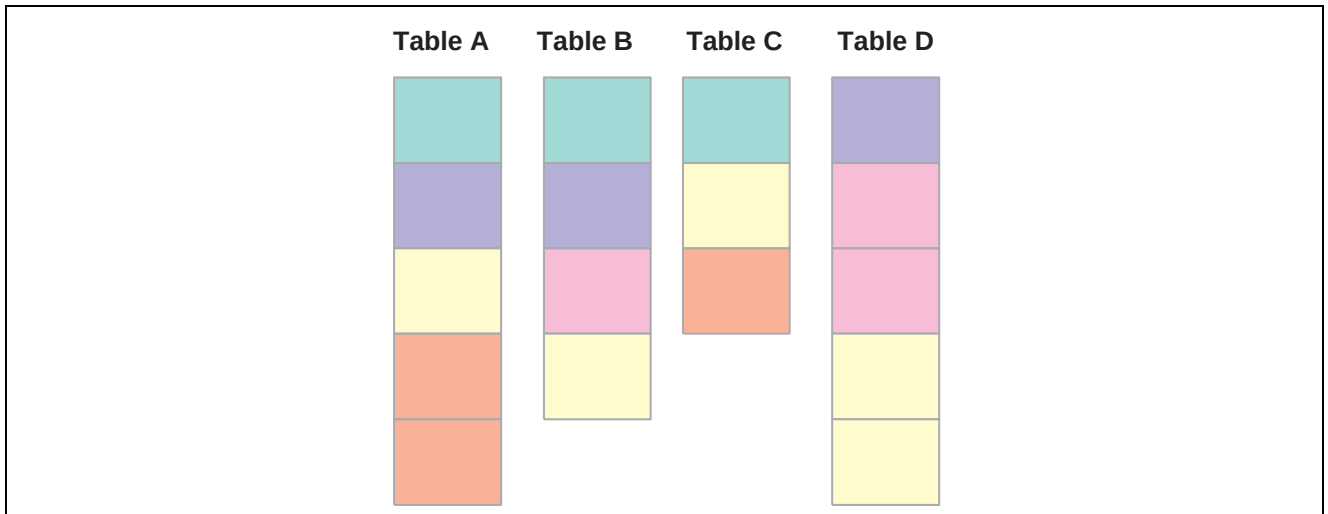
Department ID	Description
00001	Branch Administration
00002	Canadian Sales
00002	U.S. Sales
00003	Customer Service
00004	Distribution
00005	Operations

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

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

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

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



TableSet diagram

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

Exploring the Purpose of TableSets

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

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

When you add a business unit, you have the following choices:

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

How TableSet Sharing Affects Control Tables

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

For example, if you're looking on the Job Code table for an employee who is assigned to your CANADA business unit, the job codes you see are different from the ones you would see if you had assigned the employee to a company in the U.S. business unit, even though all of the U.S. and CANADA job codes reside on a single Job Code table.

Note. All searching for control table values in relation to a worker with job data is in the context of the business unit to which the worker is assigned in your PeopleSoft HRMS system. When you hire an employee, you assign a business unit in PeopleSoft Human Resources on the Work Location page (Hire menu). See *PeopleSoft Human Resources PeopleBook, Recruit Your Workforce*.

Sharing Centrally Maintained Data Across Your Enterprise

To free you from entering redundant information and to ease information maintenance, PeopleSoft HRMS applications enable you to share control table data among business units using TableSet sharing. With TableSet sharing, you can specify the control table data that the system should use for each business unit.

If much of your control table data is the same from business unit to business unit, TableSet sharing enables you to share that information, instead of having to enter the same data multiple times.

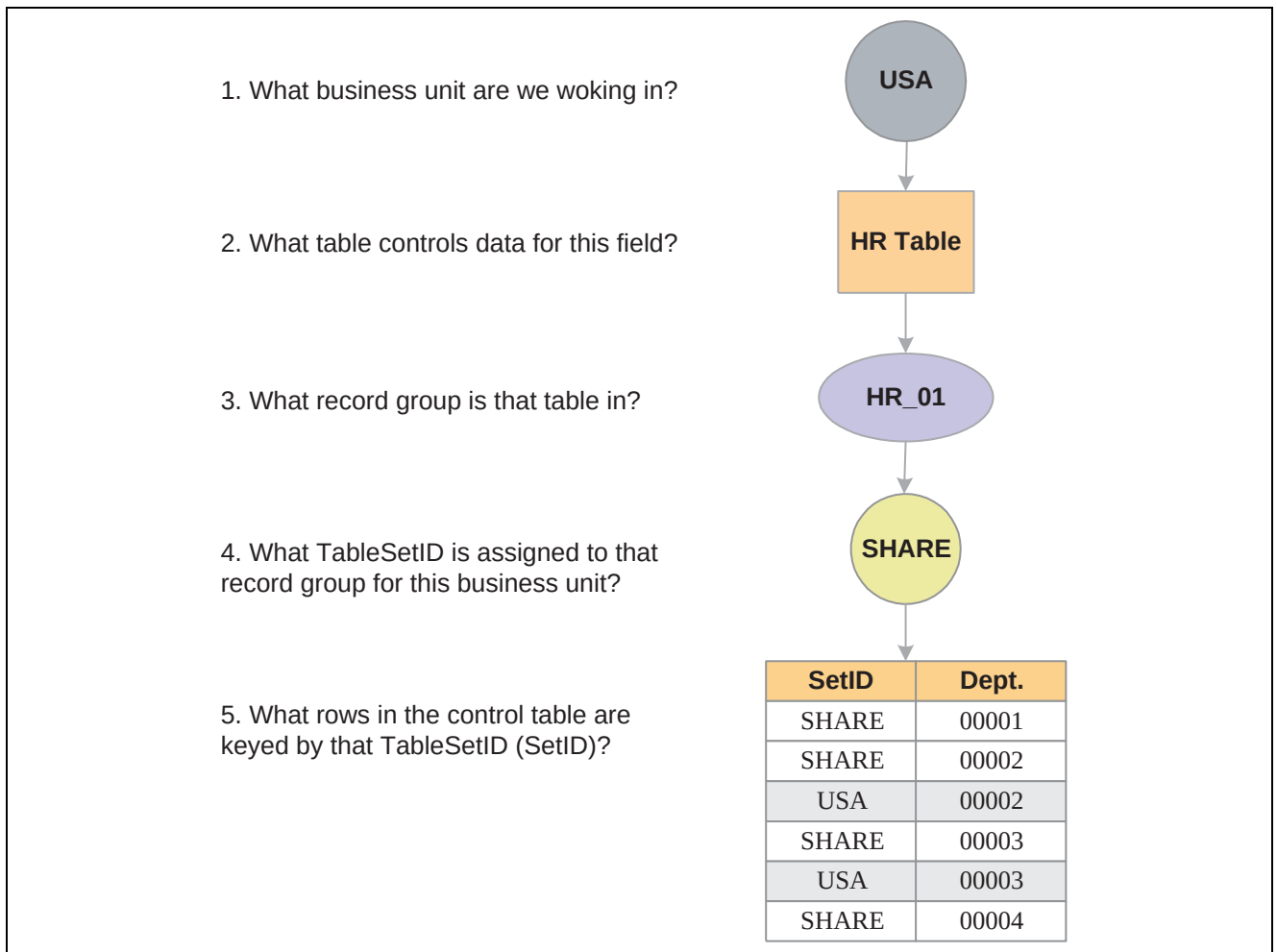
Example: Using Business Unit/SetID to Control Information Flow

For example, your organization has 10 business units with the same job codes. Enter the job code once and set up TableSet sharing.

TableSet sharing also enables you to deal with exceptions within your organization. For example, let's say that 9 of your 10 business units use the same job codes, but the tenth business unit uses entirely different job codes. You can still use TableSet sharing.

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

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

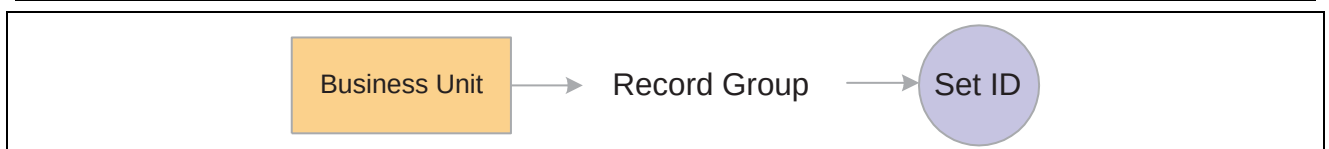


TableSet sharing process

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

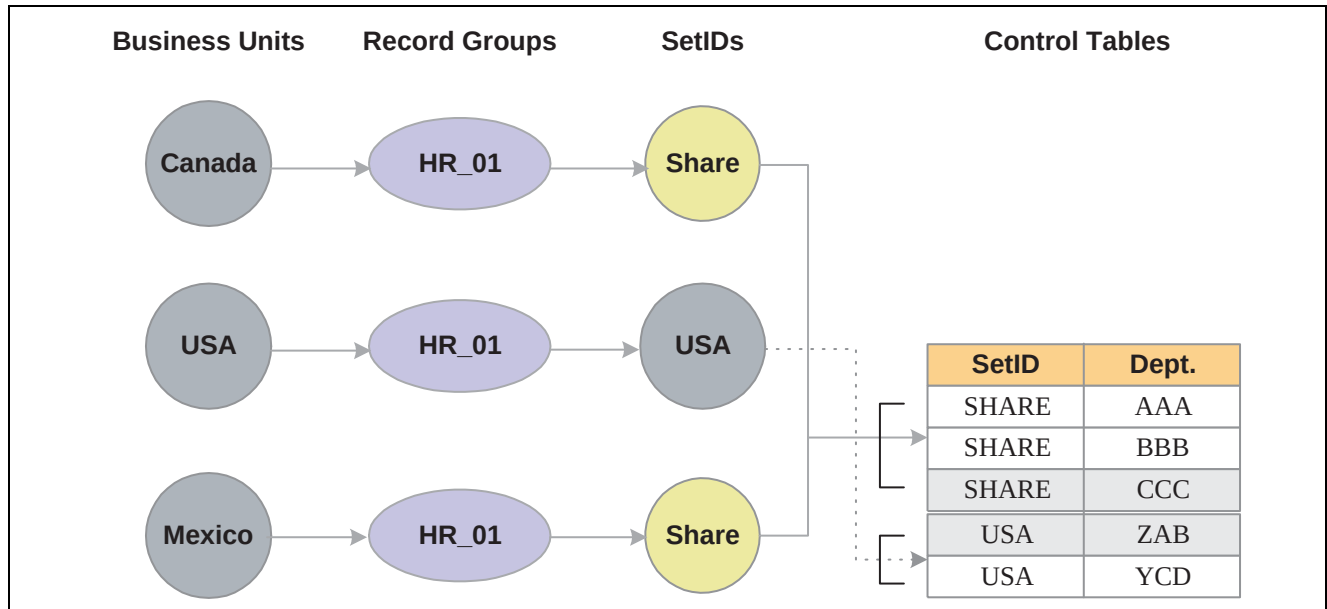
TableSet sharing is a time-saver, a way to share redundant information among business units. The key to sharing that information is defining what data is available under specific circumstances. To do this, you use SetIDs. TableSet sharing consists of assigning specific SetIDs to specific record groups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

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



Assigning specific SetIDs to specific record groups

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



TableSet sharing

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

When TableSet Sharing Doesn't Help

Sometimes you may want to share a limited amount of data among business units while the rest of your data remains unique for each business unit. For example, three of your job codes might be the same for each business unit in your enterprise, but the rest of your job codes might be unique to each business unit. In this case, TableSet sharing wouldn't be useful, and it would be more efficient to enter each job code into the Job Codes table for each SetID.

Understanding Default Values in Records That Reference Multiple SetIDs

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

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

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

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

Department Profile
Comm. Acctg. and EG

SetID: SHARE Department: 13000 [Business Units that use this Setid](#)

Department Profile
Find | View All First 1 of 1 Last

*Effective Date: 04/07/1989
*Status: Active

*Description: Finance
Short Desc: Finance

Location SetID: SHARE Table Set shared across Corp

Location: KUDE00 Delaware Operations

Company: GBI Global Business Institute

MgrID: KU0007 Locherty, Betty

Manager Position:

EmpID:

Budget Year End Date:

*Budget Level: Department

Department Profile page

In a situation where there are two SetIDs for a prompt, which SetID should the system use when it displays prompt values for the Location field? You can set the system to display all SetIDs for the Location table or you can limit the choices. Showing all SetIDs (and all Location values) often creates situations where the Location value that the user selects is not correct for a certain business unit when it is defaulted in at runtime. Consider the following example:

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

In this example, when a department is part of the SetID *USA*, there are two different SetID options for Location: *USA* and *ASIA*. If you allow the locations in the DEPT_TBL field to be selected from any SetID, regardless of department ID, SetID, and business units, the location that the system defaults into the page is invalid.

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

Scenario 2: A Transaction Table (Like the Job Data Record) in the Workforce Administration, Increase Workforce, Hire Employee Component With Multiple SetIDs Controlling Defaults Across the Transaction Record

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

First, you've defined the TableSet Record Control for the following business units:

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

Business Unit	Record Group	SetID
	LOCATION	RUSS
	SALARY	CAN

Next, you've set up the department and location tables:

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

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

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

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

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

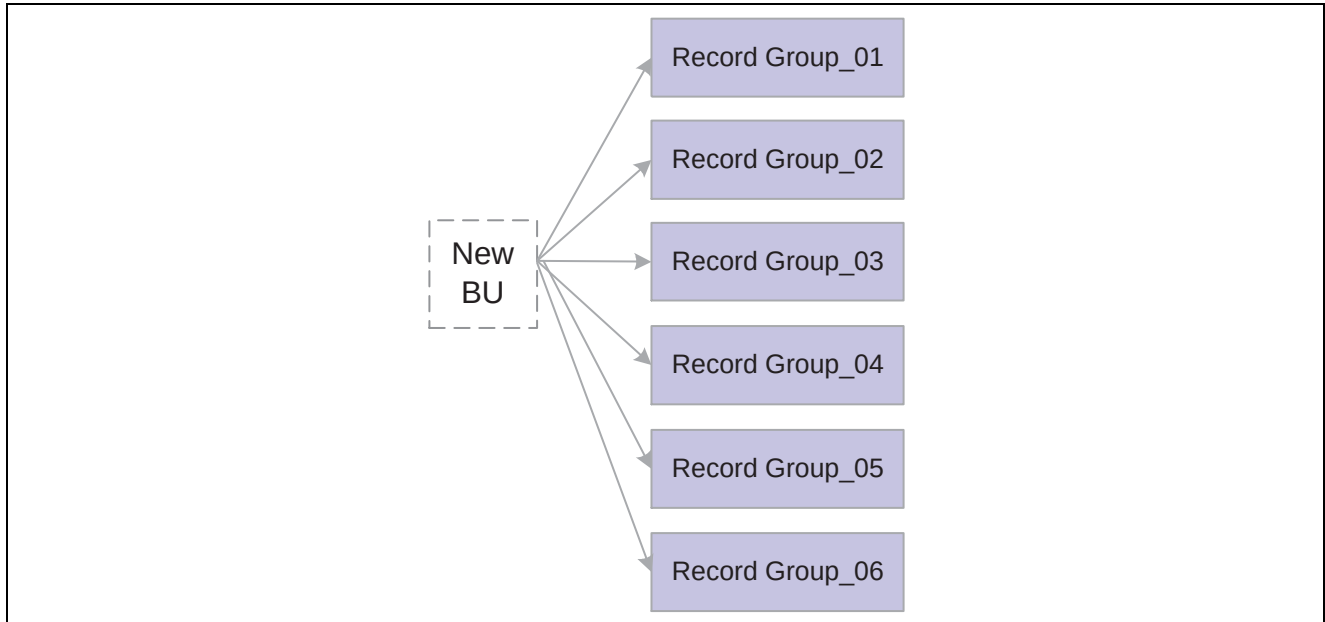
When you select a location with a PDEV SetID and move out of the Location field or accept the Location field default, the system finds the default Salary Plan SetID that you specified on the Location table and defaults in the proper Salary Plan information on the Job Data, Compensation page. In this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

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

Business Units and TableSet Sharing

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

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



The beginning of TableSet sharing

Implementing TableSet Sharing

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

- Saves time

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

- Acts as a safety net

Record groups ensure that the TableSet sharing is applied consistently across all related tables and views in your system.

Once you've determined how many business units you need and how you want to organize them, you can create them for your PeopleSoft HRMS system and then implement TableSet sharing. To define TableSet sharing for your organization, you'll use pages in both PeopleSoft HRMS and within PeopleTools.

Linking System Defaults to Business Units

Once you've defined business units and established your TableSet sharing structure, you can associate them with business units and permission lists in your PeopleSoft HRMS system. When a user signs on to the system, defaults and control values throughout PeopleSoft HRMS are based on the defaults that you establish for that user's permission list on the Primary Permission Lists table. You can do the following:

- Specify unique, default SetID and Business Unit information, along with other fields, such as Company, Country, and Standard Hours, for each permission list.
- Control which default values are placed automatically into the defined fields throughout PeopleSoft HRMS, based on the permission list that users are associated with at the user ID level.
- Share default values among your organization's business units. The table is keyed by permission list to enable this kind of sharing.

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

See Also

Chapter 3, "Understanding PeopleSoft HRMS System Data Regulation," Understanding How the System Determines Default Values , page 26

PeopleTools PeopleBook: Security, "Working With Permission Lists"

Why Define Business Unit HR Defaults?

The first time you open a system page, with or without a business unit being associated with it, the field level defaults on the page are loaded from the defaults that you set up for Company, Country, To Currency, and so forth, on the Primary Permission Lists table. These defaults are based on the permission list to which the user belongs (at the user ID level). The only time that the default settings on the Business Unit Options Default page come into play in determining field level defaults (if you've set up Business Unit HR defaults at all) is when you enter a business unit on a page where the BUS_UNIT_TBL_HR has been specified as the default and move out of the field. When you do that, the system finds the business unit (set control value) on the TableSet Control – Record Group page. The system checks to see what controlling SETID is described for the Business Unit Defaults Record Group (HR_06), goes to the default SetID on the Business Unit HR Defaults table, finds any defaults that you specified there, and populates the system page accordingly.

Setting up business unit defaults on the Business Unit HR Defaults table makes sense when you have multiple business units that share the same kind of defaults; but shared defaults are not readily organized by permission list. If this is the case, you can predetermine system defaults for the fields for which you can specify defaults on the Business Unit HR Default table.

Understanding the Difference Between Permission List and Business Unit Defaults

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

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

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

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

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

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

See Also

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

Understanding How the System Determines Default Values

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

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

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

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

Human Resources Tables Affected by TableSet Sharing

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

Control Tables

SetID is a high-level key, and TableSet sharing is driven by the business unit for the following Human Resources control tables:

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

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

Business Unit Process Tables

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

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

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

See Also

Chapter 4, “Understanding Regulatory Regions in PeopleSoft HRMS,” page 29

Understanding How Business Units Affect Job Records

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

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

Note. Organizations can point their business units to different sets of codes for each of these control tables. All prompting for these codes in relation to a worker with Job Data is controlled by the worker’s business unit.

CHAPTER 4

Understanding Regulatory Regions in PeopleSoft HRMS

This chapter provides an overview of regulatory regions and their use in PeopleSoft HRMS.

Understanding Regulatory Regions

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

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

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

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

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

See Also

PeopleSoft 8.8 Benefits Administration PeopleBook, “Defining Eligibility Rules”

Understanding Regulatory Region Table Relationships

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

- Regulatory Region
- Transaction
- Regions in Transaction

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

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

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

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

REG_REGION_TBL	>	REG_TRX_REGION	<	REG_TRX_TBL
REG_REGION DESCR50 COUNTRY REG_AVAIL		REG_TRX REG_REGION		REG_TRX DESCRLONG

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

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

Establishing Regulatory Regions

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

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

Establishing Regulatory Regions

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

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

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

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

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

See Also

Chapter 10, "Installing PeopleSoft HRMS," Establishing Regulatory Transaction Types, page 141

Associating a Regulatory Region With a Transaction

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

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

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

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

Maintaining Regulatory Regions

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

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

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

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

Summary: Using Regulatory Region for Transaction Processing

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

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

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

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

How the System Establishes Default Regulatory Regions

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, “Creating and Tracking Incidents”

Chapter 11, “Setting Up Organization Foundation Tables,” Setting Up Primary Permission List Preferences, page 204

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Entering Additional Data in Human Resources Records,” Tracking Disabilities

Chapter 11, “Setting Up Organization Foundation Tables,” Defining Establishments, page 186

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions,” Creating Positions

Impact on PeopleCode Transaction Processing

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

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

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

Creating Prompt Edit Transaction Views for REG_REGION

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

```
REG_STANDARD_VW

SELECT

S.OPRID,

R.REG_REGION,

R.DESCR50,

R.COUNTRY

FROM PS_REG_REGION_TBL R,

      PS_REG_TRX_REGION T,

      PSOPRDEFN S

WHERE T.REG_TRX = 'STANDARD'

AND T.REG_REGION = R.REG_REGION
```



```

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

REG_HANDS_VW

SELECT

S.OPRID,

R.REG_REGION,

R.DESCR50,

R.COUNTRY

FROM PS_REG_REGION_TBL R,

      PS_REG_TRX_REGION T,

      PSOPRDEFN S

WHERE T.REG_TRX = 'HANDS'

AND T.REG_REGION = R.REG_REGION

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

```

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

Adding REG_REGION to Human Resources Transactions

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

Example - Job Data

To associate REG_REGION to an employee on the Job Data pages:

1. Add the Regulatory Region control field to the Work Location page (Job Data 1) early in the job transaction.
2. Make the REG_REGION field a required field.
3. After adding the field to the record, define a prompt edit from the standard view (REG_STANDARD_VW).

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

Example - Health and Safety

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

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

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

Regulatory Region	SetID
BEL	STD
CANAB	CAN
CANBC	CANBC
CANMB	CAN
CANNB	CAN
CANNF	CAN
CANNS	CAN
CANON	CAN
CANQC	CAN
CANSK	CAN
DEU	DEU
FRA	FRA

Regulatory Region	SetID
GBR	GBR
JPN	STD
NLD	STD
USA	USA

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

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

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

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

Additional Transaction Modifications for Regulatory Region

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

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions*, "Setting Up Positions," Creating Positions.

See *PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce*, "Creating and Posting Job Requisitions".

See Chapter 11, "Setting Up Organization Foundation Tables," Defining Establishments, page 186.

See Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences, page 204.

See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Disabilities.

CHAPTER 5

Working With Languages

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

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

Understanding Language Support in PeopleSoft

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

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

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

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

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

See Also

PeopleTools PeopleBook: Globalization, “Overview of PeopleSoft Globalization”

Setting Language Preferences

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

Using the Language Preference Page

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

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

Note. The Language Code used in My Profile is applied only when you run reports and produce emails.

Using the User Profiles - General Page

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

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

Classes

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

See Also

PeopleTools PeopleBook: Security

Using the International Preferences Page

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

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

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

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

See Also

PeopleTools PeopleBook: Globalization, “Controlling International Preferences”

PeopleTools PeopleBook: Security, “User Profiles”

Working With Double-Byte Characters

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

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

Important! (*JPN*) For Japanese users, it is important to determine a consistent method for entering phonetic character set information. The system applies a binary sort method to double-byte characters, and different characters with the same pronunciation aren’t sorted together in PeopleSoft HRMS. For example, a Hiragana *Ma* character is sorted before a Hiragana *Mi* character and after a Hiragana *No* character. If a Katakana *Ma* character is included in the sort, it is sorted after a Katakana *Mi* character and appears only after all the Hiragana characters are sorted.

See Also

PeopleTools PeopleBook: Globalization

Configuring Your System for Alternate Character Functionality

This section explains how to set up alternate character functionality in PeopleSoft HRMS.

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

To set up alternate character functionality in PeopleSoft HRMS:

1. Link the alternate character sets with language codes on the Alternate Character page.
These settings affect your entire PeopleSoft HRMS installation.
2. Enable the alternate character functionality for specific user IDs on the Primary Permission List Preferences page.

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



The screenshot shows a form with the label 'Prefecture:' followed by a text input field containing the value 'Akita-Ken'. To the right of the input field is a small button with a speech bubble icon, representing the 'Alternate Character' button.

Alternate Character Button

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

See Also

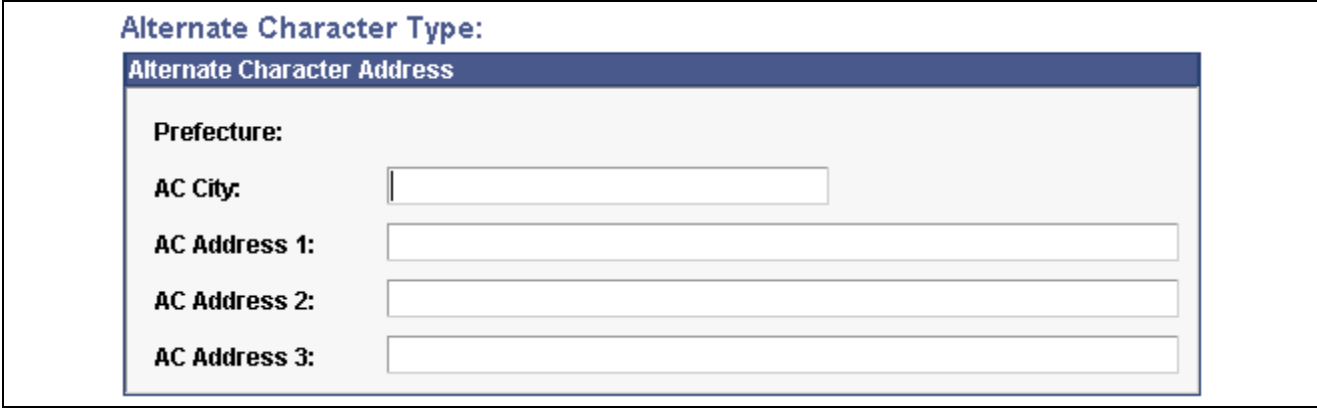
[Chapter 3, “Understanding PeopleSoft HRMS System Data Regulation,” page 9](#)

Entering Alternate Character Information

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

Note. On the Name page, when the Format for Country is *JPN*, the Name and the Alternate Character Name fields appear on the page: You can enter information in both fields directly on the Name page. On the Address page, you access the alternate character format by using a button. Whether the Alternate Character button appears on the Address page depends on the particular page and whether the Format for Country is set to *JPN*.

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



The screenshot shows a page titled 'Alternate Character Type: Alternate Character Address'. The page contains several input fields: 'Prefecture:', 'AC City:', 'AC Address 1:', 'AC Address 2:', and 'AC Address 3:'. Each label is followed by a text input field.

Alternate Character Type page

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

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

Finding Records Using Phonetic Searching

PeopleSoft Human Resources provides several options for finding an employee and updating or adding information to the employee's records in the system. If you are entering names in your human resources system using phonetic alternate character sets, you can search for specific records by entering either Kanji or Katakana in a separate Alternate Character name search criteria field that is part of the search record dialog box. If you are working with a Japanese-enabled system, you can enter a Japanese name phonetically as a search criterion.

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

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

Personal Data

Find an Existing Value

EmplID:

8

Name:

Last Name:

Department SetID:

Department:

Alternate Character Name:

カワモト

Personnel Status:

☐ Include History

☐ Correct History

Search

Clear

Basic Search

Search Results

View All

EmplID	Empl Rcd Nbr	Name	Last Name	Department SetID	Department
8052	0	Avery,Joan	AVERY	CAN	20200

Personal Data - Find an Existing Value search page

Overview of Alternate Character System Architecture

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

Alternate Character Fields Associated With Global Pages

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

Page	Auxiliary Page	Field	Comments
BANK_BRANCH_EC		BRANCH_NAME_AC	
BANK_EC		BANK_NAME_AC	
COMPANY_TABLE1	COMPANY_ACDESCR_SEC	DESCR_AC	
COMPANY_TABLE1	COMPANY_ACADDR_SEC	COMPANY_ACADDR_SBP	COMPANY_TBL.CITY_AC COMPANY_TBL.ADDRESS1_AC COMPANY_TBL.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
DEPEND_BENEF1	DEPENDBN_ACNAME_SEC	NAME_AC	
ESTAB_TBL1_GBL	ESTAB_ACDESCR_SEC	DESCR_AC	
ESTAB_TBL1_GBL	ESTAB_ACADDR_SEC	ESTAB_ACADDR_SBP	ESTAB_TBL.CITY_AC ESTAB_TBL.ADDRESS1_AC ESTAB_TBL.ADDRESS2_AC DERIVED_GBL.POSTAL_BTN ADDR_POS_JPN_SEC
HS_NON_EMPL1	HS_NE_ACNAME_SEC	NAME_AC	

Page	Auxiliary Page	Field	Comments
PERSONAL_DATA1 APP_PERSONAL_ DATA1	PERSDTA_ACADDR_ SEC	PERSDTA_ACADDR_ SBP	PERS_DATA_ EFFDT.CITY_AC PERS_DATA_ EFFDT.ADDRESS1_AC PERS_DATA_ EFFDT.ADDRESS2_AC DERIVED_ GBL.POSTAL_BTN ADDR_POS_JPN_SEC
PERSONAL_DATA1 APP_PERSONAL_ DATA1	PERSDTA_ACNAME_ SEC	NAME_AC	
PYE_BANKACCT		ACCOUNT_NAME_AC	
SRC_BANK		ACCOUNT_NAME_AC	
STATE_NAMES_ TBL	STATE_ACDESCR_SEC	DESCR_AC	
TRN_INSTRUCTR_ TBL1	TRN_INS_ACNAME_ SEC	NAME_AC	
NAMES	NAMES_ACPREFNM_ SEC	NAME_AC	

Search Records With Alternate Character Name Fields

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

- APPLICANT_GBL
- APPL_SRCH_GBL
- ASGN_CMP_SCH_JP
- ASGN_CMP_SRCH
- CAREERPLAN_SRCH
- CAREERPLN_SC_JP
- CAREER_ADD_SRCH
- CAREER_ADD_S_JP

- CAR_PLAN_SRCH
- CM_SRCH_MATCH
- CNT_APPSRCH_GBL
- CNT_APPSRCH_JPN
- CNT_SRCH_GBL
- CNT_SRCH_JPN
- EMPLMT_SRCH_GBL
- EMPLMT_SRCH_NLD
- EMPL_COMP_SRCH
- EMPL_DEPT_SRCH
- HS_NE_PERS_SRCH
- HS_PERS_SRCH
- INTERVW_SRCH
- NE_INCIDENT_SRCH
- NE_PERSONAL_DTA
- NE_STUDENT_SRCH
- PERSONAL_DATA
- PERS_SRCH_GBL
- PHYSICIAN_SRCH2
- SUCCESSION_SRCH
- SUCCESS_EM_SRCH
- SUCCESS_TR_SRCH
- TRAIN_HIST_SRCH
- TRAIN_HIST_S_JP
- TRN_DMNDDEE_SRCH
- TRN_INSTRCT_VW
- TRN_INSTR_SRCH

Note. This list includes only Human Resources system records.

PeopleSoft Human Resources Reports That Sort on Alternate Character Name

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

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

SQR/Crystal Reports

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

Report ID	Description
PER001	Department Action Notices
PER002	Employee Birthdays
PER004	Emergency Contacts
PER005	Employees on Leaves of Absence
PER007	Temporary Employees
PER008	Employee Review Audit
PER009	Union Membership
PER011	Company Skills Inventory
PER012	Departmental Salaries
PER013	Employee Compensation Changes
PER020	Employee Home Address Listing
PER023	Salary History

Report ID	Description
PER030	Job Group Roster
CMP003	Compa-ratio Analysis by Grade and Job
CMP004	Below-Minimum Analysis
CMP005	Above-Maximum Analysis

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

PeopleSoft Human Resources Reports That Support Japanese Name Formatting

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

Report ID	Description
APP005	Candidate Listing
APP009	Interview Schedule
APP008	Skills Matching
APP010	Search Requirements
CMP003	Compa-ratio Analysis by Grade and Job
CMP004	Below-Minimum Analysis
CMP005	Above-Maximum Analysis
PER001	Department Action Notices
PER002	Employee Birthdays
PER003	Years of Service
PER004	Emergency Contacts

Report ID	Description
PER007	Temporary Employees
PER008	Employee Review Audit
PER009	Union Membership
PER011	Company Skills Inventory
PER012	Department Salaries
PER013	Employee Compensation Changes
PER014	Absence History
PER015	Personnel Actions History
PER020	Employee Home Address Listing
PER021	Pending Future Actions
PER023	Salary History
PER030	Job Group Roster
PER032	Passport/Visa Expiration
PER033	Citizenship Status/Country Citizenship/ Visa Audit
PER034	Internal Resumes
POS003	Incumbent Position History
POS006	Indented Position Organizational Chart
POS008	Position Exceptions or Overrides

CHAPTER 6

Working With Currencies

This chapter provides an overview of currency in PeopleSoft HRMS.

Understanding Currency

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

Understanding currency in PeopleSoft is a two-part process:

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

See Also

PeopleSoft Currency Conversion Utility PeopleBook

Running Currency Setup Reports

This section explains how to generate reports of your Currency Code table and Currency Rate table.

Pages Used to Run Currency Setup Reports

Page Name	Object Name	Navigation	Usage
Currency Rate Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Rate Report	Use this page to run these reports: • Currency Code Table report (PER713) prints information about each currency defined in your Currency Code table. • Currency Rate Table report (PER714) prints information about exchange rates.

Configuring Currency Precision

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

PeopleSoft rounds all currency-sensitive amount fields to the currency precision of the controlled currency during all online or background processes. For example, in a database containing amount fields with a length of 15.3, Japanese yen are rounded to 123.000 and U.S. dollars are rounded to 123.230. The system doesn't place a nonzero amount after the decimal for a Japanese amount or after the second digit to the right of the decimal for a U.S. amount.

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

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

Activating Currency Precision

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

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

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

See Also

PeopleTools PeopleBook: Data Management, “PeopleTools Utilities,” PeopleTools Options

Reporting With Currency Precision

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

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

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

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

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

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

Expanding a Database for Currency Precision

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

To expand your database:

1. Back up your database (optional).

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

2. Run Audit scripts.

Run DDDAudit and SYSAudit from PeopleSoft Process Scheduler to ensure that the database is clean. Select PeopleTools, Process Scheduler Manager, Process, Multiple Process Sample, and enter a *Run Control ID*. Click Run or select File, Run. Specify the *Server* name of your environment, and select *DDDAUDIT* (and then *SYSAUDIT*) from the list of processes. Click OK to run the processes.

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

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

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

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

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

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

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

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

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

7. Review SQR.LOG for errors.

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

8. Use SQL Alter all tables.

- a. Select PeopleTools, Application Designer, File, New, Project.
- b. Select File, Save Project As.
- c. Save the Project Name as *CURR_TBL*.
- d. Select Insert, Objects into Project.

- e. Select Object Type: Record and Type: Table.
 - f. Click Insert under Record Name. The system displays a list of all the tables being populated.
 - g. Click Select All, and click Insert again; click Close to close the page.
 - h. Select Build, Project.
 - i. In the Build Options group box, select Create Indexes and Alter Tables.
 - j. Under Build Execute Options, be sure that the *Build* script file is selected.
 - k. Review the script file with your database administrator (DBA), and execute the file using your recommended SQL query tool.
9. Use SQL Create all views.
- a. Select PeopleTools, Application Designer, File, New, Project.
 - b. Select File, Save Project As. Save the Project Name as *CURR_VW*.
 - c. Select Insert, Objects into Project. Select Object Type: Record and Type: View/Query View.
 - d. Click Insert and then click Select All.
 - e. Click Insert again; then click Close to close the page.
 - f. Select Build, Project.
 - g. In the Build Options group box, select Create Views.
 - h. Under Build Execute Options, select the Build script file.
 - i. Review the script file with your DBA, and execute it using your recommended SQL query tool.
10. Run Audit scripts again.

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

11. Manually change reports.

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

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

See Also

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

Viewing Multiple Currencies

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

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

Viewing Information About Current Exchange Rate Calculations

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

CHAPTER 7

Working With Multiple Jobs

This chapter provides an overview of working with Multiple Jobs and tells you how to:

- Activate Multiple Jobs functionality.
- Change Search Views for Base Benefits.

Understanding Multiple Jobs

Employees who hold more than one job at the same time create unique requirements for the PeopleSoft Human Resources Management System. If your organization enables an employee to hold more than one job at the same time, you must be able to:

- Combine the employee's job data to comply with regulatory requirements.
- Determine benefit and pension eligibility.
- Calculate deductions and credits for payroll processing.

The PeopleSoft Multiple Jobs feature enables you to hire an employee into more than one job at any time. For example, an employee works at a university with a hospital. The university and hospital are set up as separate companies. The employee holds three concurrent jobs: as a professor at the university, as a dean at the university, and as a physician at the hospital.

You also use the Multiple Job functionality if your organization sends employees on international assignments. PeopleSoft Human Resources treats each assignment as a separate job, with its own employment and benefit data.

In this chapter, we discuss how Multiple Jobs handles concurrent jobs in People Soft Human Resources, Benefits Administration, Payroll for North America, and Pension Administration.

Effect of Multiple Jobs on PeopleSoft Human Resources

When an employee holds more than one job, each job must have its own set of employment and job data. When you enter an additional job, you need to make two decisions:

- For reporting purposes, which of the employee's jobs is the primary job.
You don't have to designate a primary job, but you may want to, to ensure accurate affirmative action statistics and other data that is required for government reporting.
- Whether the employee's jobs will share a benefits program or have separate benefits.

The system provides flexibility in mixing and matching jobs and benefits programs.

In other ways, PeopleSoft Human Resources treats an additional job the same way that it treats the employee's first job.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Adding Concurrent Jobs

Effect of Multiple Jobs on Base Benefits

Some of the benefit-related issues regarding multiple concurrent jobs are:

- Which job is the employee's main, or primary, job?
- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- Which jobs are used for calculating deductions and contributions?
- How are the deductions or contributions calculated?
- When do you take deductions and when do you apply credits?

Designating the Primary Job for Benefits

You may want to base an employee's eligibility for benefits on a single job. This is called the *primary job* (not to be confused with the primary job for PeopleSoft Human Resources (HR) reporting purposes). The system also uses the primary job to associate payroll deductions for benefits with a specific job. Each benefit record number (group of jobs) that you designate for an employee has one job designated as the primary job.

When a person is hired into a position, the system flags that job as *primary* based on rules that you have set up. This flag is stored in the Primary Job table. As the employee is hired into other concurrent positions, the system turns this flag on or off based on the rules that you have established.

For example, here is what the Primary Job table would look like for the professor/dean/physician employee:

Job Title	Employee Record	Benefit Record	Primary Job?
Professor	0	0	Yes
Dean	1	0	No
Physician	2	1	Yes

The primary job flag is used throughout the system to:

- Determine when a deduction should be taken.
- Identify the job that will provide the service date and the termination date.

The designation of an employee's primary job is effective-dated and can be changed anytime from a data maintenance page. Also, because the action of starting a new, concurrent job or terminating an existing job usually affects the determination of the employee's primary job, you can define rules that redesignate the primary job when one of these job actions is entered into the system.

For other actions (such as a job moving from full-time to part-time status), you can also indicate whether the system sends a work list entry to the Benefits Administrator through PeopleSoft Workflow for review.

Grouping Jobs to Determine Benefit Eligibility

When employees hold multiple concurrent jobs, they may be eligible for different offerings of benefits, based on the combination or mix of the jobs that they hold. Conversely, they may be eligible for certain offerings based solely on the fact that they hold a particular job.

Multiple, concurrent jobs introduce the concept of a *benefit record number*. If an employee is eligible for multiple sets of benefits (or possibly multiple benefit programs), then you enroll the employee in those benefits according to the set of benefits that corresponds to a grouping of one or more jobs. The benefit record number is the mechanism that is used to group concurrent jobs for benefits eligibility and enrollment purposes.

When Multiple Jobs is activated, all enrollments for benefits are specific to a benefit record number.

Maximum Number of Concurrent Jobs

An employee can hold a maximum of 50 concurrent jobs across all benefit record numbers. PeopleSoft Payroll can process only 50 benefit record numbers on one paycheck.

Calculating Benefit Deductions

The same grouping method that is used to determine eligibility can be used to calculate deductions. You can group jobs to calculate a deduction that is based on the employee's salary. Typically this involves calculating coverage and related premiums for Life and Disability plans that are based on the employee's salary or compensation rate. You calculate the coverage and deduction based on:

- The salary of the primary job.
- The summed salaries from a group of jobs

When you designate the primary job for a benefit record, the system ties all deductions for the benefits that are associated with this benefit record to this job. Benefits deductions are taken only from checks by which the associated primary job is paid. This assures that deductions are taken at the proper frequency when the individual jobs in a group are paid on different frequencies or on separate checks.

When jobs are combined into a single check for all benefits record numbers, the benefits deduction for the different benefit record numbers is printed as separate detail lines.

Applying Regulatory Contribution Limits

When applying regulatory limits to contributions for savings plans, the system takes into account all earnings and deductions that the employee has across multiple jobs, not just the job or jobs that are associated with the plan that is being limited.

The Retro Deduction and Imputed Income Adjustment processes reevaluate deductions over a specified period of time. Using the current state of the database (benefit and general deduction enrollments, job history and primary job assignment), the system recalculates deductions and compares them to the deductions that were originally calculated and taken.

In a multiple job environment, the primary job indicators play an important role in the calculation of deductions. If changes are made to the primary job history that affect confirmed pay periods, and these changes involve a shift of pay frequencies, then the system might calculate a different deduction amount for this period than it originally calculated. During Retro Deduction and Imputed Income Adjustment processing, the system drives the calculation off the primary job history for the adjustment period.

Percent of Gross Deduction Limits

Calculation rules can be set up with a percent of gross limit applied to a benefit deduction. Also, rate tables can specify the portion of a deduction that is subject to this percent of gross limit. Now that earnings from multiple jobs with different benefit record numbers can be combined into a single check, this can result in a different gross earnings amount being calculated than when these jobs were not combined into a single check.

When applying the Percent of Gross limit to a deduction, the system uses the entire gross earnings from the check, as opposed to just the gross earnings that are attributable to the jobs with the same benefit record number as the enrollment for the deduction that is being limited. This can result in different deduction amounts being calculated than were previously calculated.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Managing Multiple Jobs”

Effect of Multiple Jobs on PeopleSoft Benefits Administration

The major impact that multiple jobs have on PeopleSoft Benefits Administration is on benefit eligibility and event triggering. Considerations are:

- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- If a change affects one job, how do you determine the effect that it has on the other jobs?

Determining Eligibility With Multiple Jobs

The system uses Eligibility Rules to determine if an employee meets the organization’s rules for enrollment in a benefit program or option. Eligibility Rules comprise three major components:

- Eligibility Criteria
- Grouping Method
- Evaluation Method

Each component is tied to an Eligibility field within an Eligibility Rule. The Eligibility Criteria field defines the data values that determine eligibility or ineligibility. The employee’s Primary Job indicator and Include for Eligibility checkboxes on the Primary Jobs table, together with the Grouping Method and Active Only fields, define which jobs should be evaluated. Finally, the Evaluation Method component defines how the group of jobs should be evaluated.

When defining Eligibility Rules, the Grouping Method, Evaluation Method, and Active Only fields are visible on the page only if Multiple Jobs processing is active.

With multiple jobs, you specify a Grouping Method. Grouping Method enables you to define which jobs to include when the system is evaluating the benefits for which an employee is eligible:

AllFlagged	Groups all jobs with the Include for Eligibility flag on Primary Jobs that are selected for all benefit record numbers.
Flagged BR	Groups all jobs with the Include for Eligibility flag on Primary Jobs that are selected within the benefit record number of the event.
Primary	Looks at only the primary job within the benefit record number of the event.

When determining which jobs should be grouped, the Active Only check box from the eligibility rule is also used. If this flag is ON, then only those jobs with an active Empl_Status (employee status) of A, L, P, W, or S are included when the Grouping Method is All Flagged or Flagged BR.

Another component of the eligibility rule is Evaluation Method. Evaluation Method enables you control how the jobs that are selected from the grouping method are evaluated against the eligibility criteria, when determining whether the employee satisfies the eligibility rule:

One or More	At least one job in the group must satisfy the rule.
All	All jobs in the group must satisfy the rule.
Sum	The sum of the eligibility field's data value from all jobs in the group must satisfy the rule.

Let's use the employee with three jobs to see how all the information comes together to determine eligibility. The event we're processing is for Benefit Record 0, and this is the Eligibility Rule for the FTE (full-time equivalency) field:

- Minimum FTE must equal 1.
- Grouping Method is AllFlagged.
- Active Jobs Only flag is Y.

Job	Employee Record #	Benefit Record #	Primary Job	Include for Eligibility	Include for Deductions	FTE
Professor	0	0	Yes	Yes	Yes	.50
Dean	1	0	No	Yes	Yes	.25
Physician	2	1	Yes	Yes	Yes	.25

All jobs are active, so the group consists of all the jobs. The FTE adds up to 1.0 across these jobs, so this employee meets the eligibility rule.

Suppose that the Grouping Method is All Flagged BR. Then the group of jobs we evaluate is Empl_Rcd (employee record) 0 and Empl_Rcd 1. The sum of these FTE fields is .75, which does not meet the eligibility criteria.

Benefits Credits and the Primary Job

PeopleSoft Benefits Administration posts credits for benefits to the Additional Pay tables under the employee record number that is equal to the benefit record number. During a pay calculation, the system loads deductions for benefits only if the primary job for the benefit record is being paid on the check that is being calculated. Likewise, when loading additional pay for benefits credits, the credits posted under any employee records number for a particular benefit record are loaded to the paysheet of the primary job only for that benefit record.

This means that during a pay calculation, the system (while processing a particular job) determines whether this is the primary job for the associated benefit record number. If it is, the system searches for the additional pay data, looking for benefits credit entries, for example Add'l Pay Reason = 'BAS' for *any* Empl_Rcd that is assigned to this benefit record.

All entries found are loaded to the paycheck. If this is not the primary job, no benefit credits are added to the check. This ensures that there is no “double dipping” of deductions and that the credits for benefits always appear on the same check as the corresponding deductions.

Triggering Events with Multiple Jobs

The primary job drives the processing of an event for a specific benefit record number. This job must have a benefit system flag set to BA - Benefits Administration. The primary job provides the company ID and the BAS Group ID data for the processing schedule.

There are three main categories of events:

- Events that are triggered through a direct change to employee data.
- Events that are inserted into the system manually on the BAS Activity page.
- Passive events.

If changes are made to an employee's Job data that impacts the employee's primary job designation, Include for Eligibility flag, or Include for Deduction flag, the system generates an entry into the BAS Activity Table for a new type of trigger, the (MJ) MultiJob trigger. These triggers are generated with a Bas_Action code of MJC (MultiJob Change), which resolves to the system Miscellaneous Event, if a specific Event Class is not set up for this Bas_Action code. Events that are created as a result of a change to the Primary Jobs table process through the system as (MSC) Miscellaneous Events.

Some of these trigger types may affect an employee's eligibility for benefits across all Benefit Records. For example, the (TP) trigger (Pers_Data_Effdt) is generated when you change an employee's address. Because the Employee Address is not related to any particular job (or benefit record), this change could affect the eligibility for benefits across all of that employee's benefit records. Changes to the employee's age are not specific to a particular job. Because these types of changes can affect all benefit records for an employee, the system creates an event for each benefit record that is held by the employee when it processes one of these triggers. This is also true for Passive Birthdate (PB) triggers that are generated as a result of processing Passive Events.

The system explodes the original trigger into a set of new triggers, one for each benefit record. You won't see these exploded triggers in the BAS Activity Table, because they're normally processed in the same Event Maintenance run in which they're created. Each exploded trigger generates a new event that has the same event class as the original trigger.

Other expanded triggers are generated as a result of the options that you configure. Because you can define eligibility rules with grouping methods that cross benefit record boundaries, we can't assume that the data changes that generate other types of triggers won't affect other benefit records.

For example, suppose that you change the example employee (professor/dean/physician) from Full Time to Part Time in one job. The three concurrent jobs provide multiple benefit records. As a result of changing the Full/Part Time indicator, the system generates a (TJ) Job trigger in the BAS Activity Table. This trigger contains the employee record and the corresponding benefit record of the job that is changed. If any eligibility rule uses a Grouping Method of *All Flagged*, meaning that jobs from any benefit record can contribute eligibility information for this benefit record, you need to expand these triggers. Carefully consider whether you want to activate this trigger explosion. It creates some overhead for the system to maintain and process. If you have eligibility rules that cross benefit record boundaries, then you should select Automatically Create Triggers for All Benefit Records for Job Triggers, Passive Service Triggers, and MultiJob Trigger on the Multiple Jobs Options page. If you have no such eligibility rules in your system, you can safely turn off the explosion for each trigger type.

Passive Events and Multiple Jobs

Service-based eligibility is based on the service date for the primary job. Because jobs outside of specific benefit records can be grouped, eligibility that is based on the service date can come from the primary job or from any other job in or outside a benefit record number. Therefore, the system creates a BAS Activity trigger for each job that it finds during Passive Event processing that meets the passive service evaluation. These are called PS triggers.

Marking Events for Reprocessing

The system can now better identify events that should be considered for reprocessing. Prior to this release, events were flagged for reprocessing consideration when a Bas_Activity trigger was processed, and events existed that used a later Job or Pers_Data_Effdt row for eligibility purposes. In the prior releases, only one Job row could contribute to eligibility, so in the event that Standard Hours was changed on the “non-primary” Job row, and standard hours accumulation was used for eligibility, the system would not detect that existing events may need to be re-processed. We have changed this flagging mechanism to search for, and flag all events for the employee that may have used the Job row indicated in the trigger. Although we can’t be sure that the Job row was used for eligibility purposes, we eliminate the risk of not flagging an event that should be considered for reprocessing.

See Also

PeopleSoft 8.8 Benefits Administration PeopleBook, “Defining Eligibility Rules,” Setting Up Eligibility Rules
PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Managing Multiple Jobs”

Effect of Multiple Jobs on PeopleSoft Payroll for North America

The multiple job functionality has the following effect on PeopleSoft Payroll for North America:

- **Primary Pay Group**

When an employee has jobs in more than one pay group, you can designate a primary pay group that controls when deductions are taken from the employee’s earnings and when instructions for deduction overrides apply. The employee’s primary pay group is also the pay group for which a consolidated paysheet is built, if you activate the single check feature described below.

- **Single Check**

If you activate the Single Check for Multiple Jobs feature in PeopleSoft Payroll for North America, you can produce a single check for employees with multiple jobs across pay groups within the same company. During the Paysheet Calculation process, the system creates a consolidated paysheet for the employee's primary pay group. The paysheet includes all of the employee's FLSA (Fair Labor Standards Act) calculations, taxes, benefits, and general deductions for all jobs with the same period end date; check date; FLSA period, if applicable; and payroll cycle (on- or off-cycle). Pay run IDs and pay frequencies that are associated with the jobs can differ.

- **Deduction Limits**

Limits for general deductions and benefit deductions can vary by job. PeopleSoft Payroll for North America adjusts the Current Goal Balance for the appropriate jobs when deductions are taken.

- **Union Dues**

Union dues are deducted from earnings only when the job that's assigned the corresponding union code is paid.

- **FLSA Overtime Rules**

PeopleSoft Payroll for North America fully complies with FLSA overtime rules for non-exempt employees. If a non-exempt employee has other exempt or non-exempt jobs in the same organization, the system calculates the correct overtime for any extra hours worked.

See Also

PeopleSoft Payroll for North America PeopleBook

Effect of Multiple Jobs on PeopleSoft Pension Administration

PeopleSoft Pension Administration supports the use of multiple concurrent jobs, instead of relying on Employment Record number 0 for much of the information that is used in the pension benefit calculations.

Multiple Jobs and the Eligibility Process

The eligibility process always produces two primary results:

- Confirmation of whether an employee has ever been eligible for pension benefits.
- Time line showing the periods of eligibility and ineligibility.

For a single-job environment, producing these results is a matter of examining an employee's only job record history. If an employee has multiple, concurrent jobs, the system determines plan eligibility based on all jobs. The system considers the employee to be eligible for a particular period if any of the jobs are eligible.

Multiple Jobs and the Primary Job Record

In a single-job environment, the system looks at only record number 0 when processing or resolving database aliases, and it ignores all other records. Record number 0 is the only primary job record that is allowable. This is not always useful for users of multiple concurrent jobs because an employee's first job record is not always the best primary record. When you use multiple jobs for PeopleSoft Pension Administration, the system does not select Employment Record number 0 as the primary record. It examines all of an employee's records and selects a primary record by choosing the first record that it finds in the following prioritized order of categories:

1. Overrides
2. Covered Active

3. Covered Inactive
4. Any Active
5. Any Inactive

If it finds more than one of any of these categories, it selects the lowest-numbered record in that category.

You can accept the system-calculated primary record or override it with your own definition of which job record should be the primary record. Do this by configuring your definition of which actions make a job active or inactive or by using the Primary Job Overrides page to designate a record of your own choosing as the primary record.

See Also

PeopleSoft 8.8 Pension Administration PeopleBook, “Defining Plan Eligibility”

PeopleSoft 8.8 Pension Administration PeopleBook, “Defining the Primary Job Record and Multiple Jobs Considerations”

Chapter 10, “Installing PeopleSoft HRMS,” Setting Up HRMS Options on the PeopleTools Options Page, page 133

Activating Multiple Jobs

Activate the Multiple Jobs feature when employees can have multiple, concurrent job assignments in your organization or anytime that you need to maintain different sets of records for the same employee. If you use this option, the system makes the Empl_Recd field available, when searching for data and opening various pages throughout PeopleSoft Human Resources, and displays the employment record information on the pages.

You activate Multiple Jobs by selecting Multiple Jobs Allowed on the PeopleTools Options page. Remember to reset PeopleSoft Application Server so that the system can pick up your change.

If you select the Multiple Jobs Allowed check box, you must add Add Concurrent Job as an option to the Use menu on the Administer Workforce menus. You complete this task using PeopleTools Object Security.

See Also

PeopleTools PeopleBook: Security, “Understanding PeopleSoft Security,” *Object Security*

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information”

Changing Search Views for Base Benefits

In a multiple job environment, an employee might have more than one benefit record number with one or more jobs associated with the different benefit programs. When searching for employee data using standard search views, you may not know which record to look at. When Multiple Jobs is activated, the system uses alternate search views that link to the benefit record number rather than the employment record number.

Operator Security does not change. No special consideration is given to the Primary Jobs in the search views. If any job in the benefit record passes the security criteria for the operator, then the benefit record is available for enrollment activity.

Page Used to Change Benefits Search Views

Page Name	Object Name	Navigation	Usage
Benefits Search View Mgmt (benefits search view management)	BN_SRCH_VW_MAP	Set Up HRMS, Product Specific, Base Benefits, Multiple Job Benefits, Benefits Search View Mgmt	Change benefits search views from a single job environment to a multiple job environment.

Changing Benefits Search Views

Access the Benefits Search View Mgmt page.

Benefits Search View Mgmt

This page is used to configure the Search Views used on certain Benefits-related components to reflect either a single job or a multiple jobs environment (as set on the PSOPTIONS table).

***Setup Search Views for:**
Multiple Jobs Environment
☒ **Multiple Jobs Allowed**
Set Search Views

Benefits Search View Usage				
Component Name	Description	Search Record Currently in Use	Standard Search Record	Multiple Jobs Search Record
BENEFIT_COMMENTS	Dependent/Beneficiary Comments	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL	EMP_BEN_SRCH_MJ
BEN_PROG_PARTICPTN	Benefit Program Participation	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL	EMP_BEN_SRCH_MJ
BILL_CSUM_BY_BPER	Charge Summary by Bill Period	BEN_BI_CSB_SRCH	BEN_BI_CSB_SRCH	BEN_BCSB_SCH_MJ
BILL_CSUM_BY_PTYPE	Charge Summary by Plan Type	BEN_BI_CSP_SRCH	BEN_BI_CSP_SRCH	BEN_BCSP_SCH_MJ
CHARGE	Charge Review	BEN_BI_SRCH_VW	BEN_BI_SRCH_VW	BEN_BI_SRCH_MJ
COBRA_FSA	COBRA FSA Benefits	CBR_FSA_SRCH	CBR_FSA_SRCH	CBR_FSA_SRCH_MJ
COBRA_HEALTH	COBRA Health Benefits	CBR_BENEF_SRCH	CBR_BENEF_SRCH	CBR_BEN_SRCH_MJ
COBRA_PROG_PARTIC	COBRA Program Participation	CBR_BENEF_SRCH	CBR_BENEF_SRCH	CBR_BEN_SRCH_MJ
DISABILITY_BENEFIT	Disability Benefits	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL	EMP_BEN_SRCH_MJ

Benefits Search View Mgmt page

Setup Search Views for

Select the search view to use: *Multiple Job Environment* or *Single Job Environment*.

Multiple Jobs Allowed

If selected, this indicates that Multiple Jobs Allowed was selected on the PeopleTools Options page.

Set Search Views

Click this button to update the Benefits Search View Usage grid.

- If you selected *Multiple Job Environment*, the Multiple Job Search Record column is copied to the Search Record Currently in Use column.
- If you selected *Single Job Environment*, the Standard Job Search Record column is copied to the Search Record Currently in Use column.

Benefits Search View Usage

Displays the components that must have the search view changed in order to accurately present multiple job employee data.

Component Name	Displays the component names.
Search Record Currently in Use	Lists the currently used search records.
Standard Search Record	Lists the search records that are used for a standard single-job environment.
Multiple Job Search Record	Lists the search records that are used for a multiple-job environment.

CHAPTER 8

Using Frequencies

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

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

Understanding Frequency

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

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

Using Frequency

This section discusses how to:

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

Using Frequency With Compensation Rates

When you associate frequency with compensation rates, you define the time period on which the compensation is based. For example, you might state a worker's base salary as *60,000* a year (annual frequency) or *5,000* a month (monthly frequency). When you associate these compensation rates with jobs, positions, salary steps, or individual employee records, the system uses the annualization factor that is associated with this frequency to convert the compensation to other frequencies.

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

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

Human Resources Standard Frequencies

PeopleSoft Human Resources delivers the following frequency IDs in the Frequency Table:

Frequency ID	Description	Annualization Factor
A	Annual	1
B	Biweekly	26
C	Contract	1
D	Daily	260
F	Every four weeks	13
H	Hourly	2080

Frequency ID	Description	Annualization Factor
M	Monthly	12
Q	Quarterly	4
S	Semimonthly	24
W	Weekly	52

See Also

Chapter 10, “Installing PeopleSoft HRMS,” Entering Product- and Industry-Specific Installation Information, page 122

Chapter 13, “Setting Up Jobs,” Classifying Jobs, page 227

PeopleSoft 8.8 Human Resources PeopleBook: Administer Compensation, “Setting Up Administer Compensation,” Setting Up Rate Codes

Chapter 13, “Setting Up Jobs,” Maintaining Pay Groups, page 245

Using Frequency With Payroll Calculations

PeopleSoft Global Payroll and PeopleSoft Payroll for North America use frequency to define how often certain events happen. Examples are how often someone is paid and how often a process is run. Both of these applications use the Frequency Table page, enabling you to define your own compensation and pay frequencies, which you then use wherever earnings frequency conversions occur in the system.

PeopleSoft Global Payroll uses frequency when defining elements, generation control parameters, calendar periods, rate code elements, and system elements. In addition to using frequency defined on the Frequency Table page, PeopleSoft Global Payroll also uses frequency defined on the Generation Control Frequency table.

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

PeopleSoft Global Payroll

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

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

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

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

Using Frequency With Element Definitions

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

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

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

See *PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Earnings and Deduction Elements,” Pages Used to Define Earnings Elements.

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

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

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

Define the frequency with which this earnings element is paid. If you select Use Calendar Frequency, the system uses the frequency that’s defined for the calendar period on the Calendar Period page. If you select Use Specified Frequency, you can define your frequency directly on the Earnings Calculation page by selecting from a list of frequencies. For example, you can select a frequency of M (monthly) to indicate that this earnings element is to be paid on a monthly basis.

See *PeopleSoft 8.8 Global Payroll PeopleBook*, “Using Calendars,” Creating Periods.

The Frequency field enables you to tell the system the frequency with which you are stating a value. For example, let's say that you select Use Specified Frequency, that you have a weekly payroll, and you create an earnings element with an amount of 100 and a frequency of *Monthly*. If you don't have any generation control conditions defined, the system annualizes and de-annualizes the amount into a processing frequency amount. Let's assume that you define your organization's monthly frequency as 12 and the weekly frequency as 52. The system takes the 100 (monthly amount) and annualizes it to 1200. Next, it takes this annualized amount and de-annualizes it into the payroll processing frequency (weekly, in this example). The amount paid each pay period is:

$$1200 / 52 = 23.08$$

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

Note. In PeopleSoft Global Payroll, there is no distinction between employees and non-employees. Because payroll is processed for both employees and non-employees, the PeopleSoft Global Payroll documentation refers to both of them as *payees*.

The HR Frequency Table and PeopleSoft Global Payroll Generation Control Frequency Table

Pay period frequency isn't hard-coded into the system. Instead, PeopleSoft Global Payroll uses the HR Frequency Table to determine how a frequency is calculated. For example, a monthly frequency has a factor of 12 and a weekly frequency has a factor of 52. Frequencies that are defined on the Frequency Table page are easily used wherever you use frequency in the system.

However, some frequencies aren't defined on the Frequency Table. PeopleSoft Global Payroll uses an intermediary table called the Generation Control Frequency table to accommodate the frequencies that aren't defined on the HR Frequency Table.

An example of a frequency that isn't on the HR Frequency Table is First of the Month. Let's say that you have a weekly pay frequency, but you want an earnings element to be paid only on the first pay period of the month. In PeopleSoft Human Resources, the frequency would be monthly. This might not work for your payroll purposes. So, in PeopleSoft Global Payroll, the earnings element would be defined (tagged) as *First of the Month* and paid only on the first pay period of the month.

The Generation Control Frequency table is part of generation control frequency processing.

Using Frequency With Generation Control

Generation control enables you to tell the system, through various control methods, when to process an element. For example, if an earnings element is to be paid only to active payees, you can control the payroll so that this earnings type isn't paid to terminated payees:

- First you define generation control ID parameters on the Generation Control Conditions page.

See *PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Calculation Elements,” Pages Used to Define Generation Control Elements.

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

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

Note. If the frequency that you select is other than Use Calendar Period Frequency, the system annualizes and de-annualizes the earnings amount based on the pay period frequency. If a generation control frequency exists, the system annualizes and de-annualizes the earnings amount based on that frequency. The generation control frequency overrides the pay period frequency during frequency conversion. For example, let’s say that you have an earnings element with an amount of 1200, an annual frequency, and a monthly pay period. If your organization’s monthly frequency is defined as 12, and you don’t have a generation control frequency for this earnings, the amount is de-annualized to 100 per month ($1200 / 12 = 100$). If you have a generation control frequency for this earnings element, the amount is different. Let’s say that you have defined a generation control frequency of quarterly. The earnings are de-annualized to 300 ($1200 / 4 = 300$).

PeopleSoft Global Payroll delivers four predefined generation control frequencies: First Month, Annual, January, and Quarter. All generation control frequencies are used in corresponding generation control elements.

Using Frequency With Calendar Periods

Use frequency with calendar periods when defining the frequency that’s being processed.

When processing a payroll or absence run in PeopleSoft Global Payroll, you must tell the system the time period to calculate. This is often referred to as the pay period. You define period selection criteria by defining a period ID on the Calendar Period page.

See *PeopleSoft 8.8 Global Payroll PeopleBook*, “Using Calendars,” Creating Periods.

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

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

Begin Date	End Date	Frequency
June 1	June 7	Weekly
June 1	June 30	Monthly
June 1	June 15	Semimonthly
June 1	August 31	Quarterly

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

Examples of Frequencies

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

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

Using Frequency With Rate Codes and System Elements

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

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

PeopleSoft Payroll for North America

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

Two fields—Comp Frequency (compensation frequency) and Pay Frequency—that are used in the PeopleSoft Payroll for North America system refer to the Frequency Table for their values.

The primary purpose of compensation and pay frequencies in PeopleSoft Payroll for North America is for the annualization and de-annualization of compensation during batch and online system processes.

Example

Let's look at an example of how PeopleSoft Payroll for North America annualizes and de-annualizes compensation using the data that is stored on the Frequency Table.

Imagine that the pay group to which an employee is assigned is set up with a pay frequency of ABC. Imagine also that the employee's Job record is set up with a compensation rate of *1,000.00* and a compensation frequency of DEF. ABC is the pay frequency, and it is stored in the Frequency Table with a frequency type of *B* (biweekly) and a frequency annualization factor of *26.1*. DEF is the compensation frequency, and it is stored on the Frequency Table with a frequency type of *M* (monthly) and a frequency annualization factor of *12*. Calculation of the employee's annual and pay period compensation rates results in the following figures:

- Annual Rate = Comprate X Comp. Frequency Factor
 $12,000.00 = 1,000.00 \times 12$
- Biweekly Rate = (Comprate X Comp. Frequency Factor) / Pay Frequency Factor
 $459.77 = (1,000.00 \times 12) / 26.1$

Synchronizing PeopleSoft Human Resources and Payroll for North America Processes

PeopleSoft Human Resources must obtain annualization factors from a consistent location so that PeopleSoft Human Resources and Payroll for North America calculate the same hourly, monthly, and annual rates consistently, regardless of where the calculation takes place. Hourly, monthly, and annual rates are stored on the Job record.

To resolve this issue, the system uses the Daily and Monthly fields on the Pay Group Table 1 page: You define those fields by selecting the pay frequency that matches the name of the field. Valid values are automatically populated from the Frequency Table. The Daily and Monthly fields are required fields for each pay group, and they contain frequency IDs that the system uses to calculate the daily and monthly rates for storage on the Job record.

When a pay group has a pay frequency type of monthly, the monthly frequency value that you define on the Pay Group Table 1 page must be the same as the pay frequency value for the pay group. This ensures that the monthly rate on the Job record is the same as the monthly rate that the payroll process calculates.

The standard Work Period field on the Job record indicates the time period in which employees must complete the standard hours. Valid values are stored on Frequency Table. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE (full-time equivalency).

Example

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

Job Record

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

Pay Group Record

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

Frequency Record

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

Example 1.

<i>Employee John</i>	
Hourly Rate = (Comprate X Comp. Frequency) / (Std. Hrs X Std. Weeks Frequency)	$2.50 = (100.00 \times 52.00) / (40.00 \times 52.00)$
Daily Rate = (Comprate X Comp. Frequency) / Daily Frequency	$20.00 = (100.00 \times 52.00) / 260.00$

Employee John	
Monthly Rate = (Comprate X Comp. Frequency) / Monthly Frequency	$433.00 = (100.00 \times 52.00) / 12.00$
Annual Rate = Comprate X Comp. Frequency	$52,000 = 100.00 \times 52.00$

Example 2.

Employee Jane	
Hourly Rate = Comprate	$10.00 = 10.00$
Daily Rate = (Comprate X Std. Hrs. X Std. Wks. Frequency) / Daily Frequency	$80.00 = (10.00 \times 40.00 \times 52.00) / 260.00$
Monthly Rate = (Comprate X Std. Hrs. X Std. Wks. Frequency) / Monthly Frequency	$1,733.33 = (10.00 \times 40.00 \times 52.00) / 12.00$
Annual Rate = Comprate X Std. Hrs. Std. Wks. Frequency	$20,800.00 = 10.00 \times 40.00 \times 52.00$

Exceptions to Frequency Table Use

Some processes, such as deduction calculations and Canadian tax calculations, use the pay periods per year from the Calendar Table. The value in the pay periods per year field on the Calendar Table is derived from the frequency type. For example, a frequency type of weekly means that pay periods per year are either 52 or 53, and a frequency type of semimonthly is 24.

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

Understanding Frequency Calculations for Conversions

This section discusses how to:

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

Applying Factors to the Compensation Rate

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

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

Defining the Frequency Annualization Factor

The system provides several standard frequencies. Each frequency ID has an associated annualization factor that represents the number of times that the period occurs in a year. For example, the standard annualization factor of a weekly frequency is 52, and the standard annualization factor of a monthly frequency is 12.

You can define your own frequencies and their associated annualization factors on the Frequency Table page. Using the Frequency Annualization Factor field, you can define a nonstandard annualization factor for a frequency. For example, you can define a frequency called W53 with a W (weekly) frequency type and an annualization factor of 53.

Defining Standard Hours and the Standard Work Period

When converting hourly compensation rates, the frequency conversion calculations use the job standard hours and the standard work period. Job standard hours define how many hours the employee should work in the job. The standard work period defines the work period in which the standard hours should be completed. You define the standard work period by selecting a frequency ID (and its annualization factor) from the Frequency Table.

You define the standard hours and the standard work period on the following pages:

- Job Information page of the Hire component: Define values for an employee.
- Job Code Profile page of the Job Code component: Define values for a job code.
- Basic Eligibility section of the Job Requisition Data — Screening Criteria page: Define values for an employment application.
- Salary Plan Table page: Define values for a salary plan.
- Job Information page of the Position Data component: Define values for a position.
- Settings page of the Primary Permission List Preferences component: Define values as defaults for a primary permission list.
- HRMS Options page of the Installation component: Define default values for a company.
- HR Defaults page of the Business Unit HR Defaults component: Define values as defaults for PeopleSoft Human Resources.

Defaults for Standard Hours and Standard Work Period

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

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

Defining Full-Time Equivalency

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

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

Note. (FRA) For employees in French regulatory regions, the system uses the PAID_FTE field to prorate holiday hours and pay for part-time and hourly employees.

PeopleSoft Human Resources calculate FTE using the following equation:

$$FTE = \frac{\left(\text{Job Std Hrs} \right) \times \left(\text{Annualization Factor of Job Std. Work Period} \right)}{\left(\text{Default Full Time Std. Hrs} \right) \times \left(\text{Annualization Factor of Default Full Time Std. Work Period} \right)}$$

FTE Equation

Where the default full-time Standard Hours and default full-time Standard Work Period are from:

- The Salary Plan Table (if a salary plan is defined for the employee, and if both standard hours and standard work period are defined for this salary plan).
- The Primary Permission List Preferences Table (if no salary plan is defined for the employee, and if both standard hours and standard work period are defined in the Primary Permission List Preferences Table).

Calculating the Compensation Rate Frequency for Conversion

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

The system performs compensation rate conversions as follows:

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

Note. (FRA) For employees in French regulatory regions, the system uses the PAID_FTE field to multiply the converted compensation rate.

Calculating the Annualized Rate

The system uses the following formulas to convert compensation rates to an annual frequency:

Hourly Annual Rate = Comprate X Job Standard Hours X Frequency
Annualization Factor of Standard Work Period

Monthly, daily, and other conversions Annual Rate = Comrate X Frequency Annualization Factor

Calculating the De-annualized Rate

The system uses the following formulas to convert compensation rates from an annual frequency to another frequency:

Hourly Non-Annual Rate = Comrate / (Job Standard Hours X Frequency Annualization of Standard Work Period)

Monthly, daily, and other conversions Non-Annual Rate = Comrate / Frequency Annualization Factor

The following examples illustrate the use of these formulas.

Example of Hourly to Monthly Compensation Rate Conversion

Teresa Johnson has the following employment information:

Employment Variables	Values
Comrate (hourly)	10
Job Standard Hours	35
Frequency Annualization Factor of Standard Work Period	52
Frequency Annualization Factor of Month	12

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

Rate	Equation
Annual	$10 \times 35 \times 52 = 18,200$
Monthly	Annualized Comrate / Frequency Annualization Factor of Month $18,200 / 12 = 1516.67$

Example of Monthly to Biweekly Compensation Rate Conversion

Bill McKenny has the following employment information:

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

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

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

Calculating the Job Rate Frequency for Conversion

The system uses the country-specific default frequencies to calculate the pay rates in the Pay Rates group box on the Job Data - Compensation page. The system finds the frequencies that are associated with the employee's country on the Default Frequencies table. The order you list the frequencies on this table is the order in which the pay rates appear in the Pay Rates group box. The system converts compensation rates to the default frequencies using the standard formulas described earlier in this chapter.

Defining a Frequency

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

Pages Used to Define a Frequency

Page Name	Object Name	Navigation	Usage
Frequency Table	FREQUENCY_TBL	Set Up HRMS, Foundation Tables, Compensation Rules, Frequency Table	Define a frequency ID, its frequency type, and its annualization factor.
Default Frequency	DFLT_FREQUENCY	Set Up HRMS, Foundation Tables, Compensation Rules, Default Frequencies By Country	Specify country-specific default frequencies.

Understanding Enterprise Integration Points

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

See Also

PeopleSoft Enterprise Integration PeopleBook

Defining a Frequency ID, Type, and Annualization Factor

Access the Frequency Table page

Frequency Table

Frequency ID: D

Frequency Information Find | View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Description: Daily

Short Description: Daily

Maintenance Responsibility: P PeopleSoft

Frequency Type: Daily

☐ Use Standard Hours for Annualization

Frequency Annualization Factor: 260.0000000

Frequency Table page

Maintenance Responsibility Select a maintenance responsibility. Values are:

- *C* (customer): You define the frequency ID. You are responsible for keeping this frequency code up to date.
- *P* (PeopleSoft): PeopleSoft delivers the frequency in the system and is responsible for keeping it up to date. The other fields on this page become unavailable.

Frequency Type

Select a frequency type. Values are:

- *A* (annual)
- *B* (biweekly)
- *C* (contract)
- *D* (daily)
- *F* (every four weeks)
- *H* (hourly): The Use Standard Hours for Annualization check box becomes available.
- *M* (monthly)
- *Q* (quarterly)
- *S* (semimonthly)
- *W* (weekly)

Use Standard Hours for Annualization

Select to have the system use job standard hours for annualization instead of the frequency annualization factor. The frequency annualization factor is set to 0, and that field becomes unavailable.

Note. You can use only hourly frequencies that use standard hours for annualization for compensation and pay frequency in PeopleSoft Human Resources, PeopleSoft Payroll for North America, and PeopleSoft Global Payroll.

Frequency Annualization Factor

Defines how many frequency periods occur in one year.

Examples:

- A daily compensation frequency is 260 because there are 260 workdays in the year.
- You can define a frequency called W53 with a W (weekly) frequency type and an annualization factor of 53.

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

Setting Country-Specific Frequency Defaults

Access the Default Frequencies page.

Default Frequencies

Country: CAN Canada

Frequency to display on Job

1st Frequency: A Annual

2nd Frequency: M Monthly

3rd Frequency: D Daily

4th Frequency: H Hourly

Default Frequencies page

Select four frequencies to set as defaults for the specified country. The system uses these default frequencies to calculate pay rates in the Pay Rates group box on the Job Data - Compensation page. The order you list the frequencies on this page is the order in which the pay rates appear in the Pay Rates group box.

For example, you specify the 1st Frequency as annual, 2nd Frequency as monthly, 3rd Frequency as daily, and 4th Frequency as hourly for Canada. For an employee in Canada, the Pay Rates group box displays the following pay rates in this order: annual, monthly, daily, and hourly. The system converts compensation rates to the default frequencies using the standard formulas described earlier in this chapter.

CHAPTER 9

Administering PeopleSoft Security

This chapter provides an overview of security in PeopleSoft HRMS and tells you how to:

- Choose a security type.
- Create and modify security trees.
- Link a tree with row-level security and grant department access.
- Create security fast views.
- Update data access profiles and security fast views.
- Set up security for applicant data.
- Set up security for global functionality.
- Configure data permission security.

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

See Also

Chapter 28, “Working With Self-Service Transactions,” page 495

Understanding PeopleSoft Security

Online security is a critical issue in any organization. Because most employee data in PeopleSoft Human Resources is confidential, you need to be able to designate the data that your users are allowed to see. For example, you might want managers to see only data that applies to the employees in their own departments.

PeopleSoft Security is based on permission lists and roles, as follows:

See *PeopleTools PeopleBook: Security*

Creating Permission Lists In PeopleTools Security

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

Create permission lists using the Permission Lists and Copy Permission Lists (PeopleTools, Security, Permission & Roles, Permission Lists and PeopleTools, Security, Permission & Roles, Copy Permission Lists) components.

General
Pages
PeopleTools
Process
Sign-on Times
▶

Permission List: HCCPBN1000

Description: Benefits

Permission List General

Navigator Homepage: 🔍

☐ Can Start Application Server?

☐ Allow Password to be Emailed?

Time-out Minutes

☐ Never Time-out

☒ Specific Time-out (minutes)

Permission Lists - General page

Assigning Permission Lists to Roles In PeopleTools Security

After you have created permission lists, you will create roles for your users and assign permission lists to the roles. For example, you would assign the permission lists required by your workforce's managers to the role of Manager. Roles are assigned to the user.

Create roles using the Roles and Copy Roles (PeopleTools, Security, Permission & Roles, Roles and PeopleTools, Security, Permission & Roles, Copy Roles) components.

General
Permission Lists
Members
Dynamic Members
Workflow
Role Grant
Links

Role Name: Benefits Administrator

Description: [WF] Benefits Administrator

Permission Lists [Customize](#) | [Find](#) | [View All](#) | First ◀ 1-6 of 6 ▶ Last

Permission List	Description	View Definition		
HCCPBN1000	Benefits	View Definition	+	-
HCCPEB1010	eBenefits Administrator	View Definition	+	-
HCCPFGALLP	Federal All Pages	View Definition	+	-
HCCPPY2000	Retro Benefits/Deductions	View Definition	+	-
HCCPWF2000	Worklist	View Definition	+	-
HCSPWEBLIB	Standard WebLib Permissions	View Definition	+	-

Roles - Permission Lists page

Assigning Roles to Users In PeopleTools Security

You assign roles and permission lists to users to give the access to the system as appropriate.

Assign roles to users using the User Profiles (PeopleTools, Security, User Profiles, User Profiles) component.

The screenshot shows the 'General' tab of the 'User Profile' page for user 'HCO_KUZ011'. The description is '[PS] Sanjay A Bidar - EE'. There are checkboxes for 'Account Locked Out?' and 'Expire password at next login'. The 'Logon Information' section includes fields for Symbolic ID (sa1), Password, Confirm Password, and User ID Alias. The 'General Attributes' section includes Language Code (English), Currency Code (US Dollar), and Default Mobile Page. The 'Permission Lists' section shows Navigator (HCSPNAVHP), Homepage (HCSPPRFL), Process Profile (HCSPPRFL), Primary (HCPPUSA), and Row Security (HCDPUSA). Each field has a magnifying glass icon and an 'Explain' link.

User Profile - General page

The screenshot shows the 'Roles' tab of the 'User Profile' page for user 'HCO_KUZ011'. The description is '[PS] Sanjay A Bidar - EE'. Below the tabs is a table listing assigned roles:

Role Name	Description	Dynamic	View Definition		
Employee	[WF] Employee	☐	Route Control View Definition	+	-
PeopleSoft User	PeopleSoft User	☐	Route Control View Definition	+	-
Standard Non-Page Permissions	Standard Non-Page Permissions	☐	Route Control View Definition	+	-

User Profile - Roles page

PeopleSoft Security For HRMS

Security for PeopleSoft Human Resources is concerned with employee data access, or *data permission*, and access to local country functionality in PeopleSoft HRMS global components.

As delivered, PeopleSoft Human Resources is ready for setting up departmental security. To grant data permission, you use a security tree to set up a security hierarchy. Once you establish your security tree, you use that structure to grant or deny access that data permission lists have to organizational entities.

You can improve the performance of data retrieval by using the Security Fast Views feature. This feature loads the information that you have set up in the security tree, along with employee job data, into a pre-indexed table. This reduces the amount of time that the system takes to retrieve data.

See [Chapter 9, “Administering PeopleSoft Security,” Creating Security Fast Views](#), page 102.

Understanding Data Permission Security

Data permission security (also called *row-level security*) is part of the overall PeopleSoft security setup and refers to controlling access to employee data on an individual basis. Employee data is the area of security that most concerns PeopleSoft HRMS because it involves maintaining the confidentiality of your employees' data.

Note. In this chapter, we use the term *employee* to refer to both proper employees and contract workers.

Important! In this section, we describe employee-level data security. In some applications, you might also store sensitive data for non-employee payees. Employee-level data security doesn't apply to non-employee payee data, except for pension payee non-employees. Pension Administration non-employees (beneficiaries and QDRO [qualified domestic relations order] alternate payees) are established in the system as if they were employees, complete with employee IDs and job data, in a department.

Data permission security works by associating an employee's data with a department ID. Using security trees, you grant data permission lists access to certain department IDs, which in turn give access to the data of the employees in that department. Users are then assigned a data permission list. When users logs in to the system, their data permission lists identify which department's employee data they can access.

Security Trees

Using PeopleSoft Tree Manager, you create a security tree that represents your organization's security hierarchy. Security trees enable you to grant (or deny) access to an employee's data by granting access to the entity to which they report. To grant access to a group of entities, you grant access to the entity to which all of those entities report. You can restrict access to individual entities or to a group of entities.

For example, the Los Angeles, San Francisco, Seattle, and Portland offices report to the western region of the United States, which reports to the American Corporate Office. Most people who require access to employee data from one office in the western region usually require access to employee data from all four offices. Rather than granting a data permission list access to each office separately, you grant access to the entire region.

You can also restrict access to one of the branch entities. If one permission list requires access only to the San Francisco, Los Angeles, and Portland offices, you grant access to the western region but deny access to the Seattle office.

Data Permission Lists

Entity access is granted to data permission lists rather than individual users because groups of employees often require access to the same employee data. Using the above example, if you grant access to the western region to the WEST data permission list, then you can assign that list to the three human resources clerks, two payroll clerks, and one training administrator who cover the western region. If you adjust the data permission list, the employee data access for the six employees also changes, reducing your user access maintenance.

See Also

PeopleTools PeopleBook: Security

How Does Data Permission Security Work?

To understand how PeopleTools enables employee data security, it helps to understand how the system retrieves data when you access a page or component.

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

The system also uses search records to enforce data permission security. In addition to the key and alternate key fields that you see on the search page, search views for components that contain sensitive employee data also contain the Data Permission List (ROWSECCLASS) as a key field. The user's Data Permission List is added to the SQL (Structured Query Language) select statement along with the values that the user entered on the search page. The system retrieves the employee data that matches the criteria from the search page and the user's data permission list. The system doesn't retrieve data for employees to whom you haven't granted data access. Using the above example, if you enter *Smith* in the Name alternate key field, the system retrieves employee data only for the employees with the name Smith to whom you have access.

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

A component can have only one search record. To associate more than one search record with a component (for example, data level security for some users and no data for others), you reinstall the component on different menus, one for each search record and grant access to the appropriate component.

See Also

PeopleTools PeopleBook: Application Designer

Chapter 9, "Administering PeopleSoft Security," Creating Security Fast Views, page 102

Choosing a Security Type

Data permission security enables you to grant and restrict access to employee-level data using security trees and row data permission lists. Data permission security is enforced using security search views to access employee data. PeopleSoft delivers the following ways to implement data permission security:

- Departmental security.
- (JPN) Additional appointment.
- No security.
- International security (a configuration option).

PeopleSoft HRMS applications are delivered with departmental security implemented for all of its security views, you can change from Department Security to No Security. In this section, we describe the three basic types of security and how to implement them.

The security type that you choose depends on how you define employee assignments, how you organize employee records, and the level of confidentiality that you need to maintain.

Security Type	Description
Departmental Security	Departmental Security is the default security that is delivered with PeopleSoft HRMS. Users are granted or denied access to employee data based on the organizational hierarchy that you define in the security tree. When you grant users access to a department ID on the security tree, you automatically grant them access to employee data in any department that reports (directly or indirectly) to that department ID, unless you restrict access to a specific department. Using Departmental Security, you grant and deny access to employee data using row-level permission lists. Users are assigned a row-level permission list granting them access to certain departments' data.
Additional Appointment JPN	(JPN) Users who have access to the department of the additional appointment of an employee can access the main appointment record for that employee. The system assigns some additional assignments (Kenmu) to a particular EmplID and record called a <i>main appointment</i>, the job you can access through the Job Data component. See <i>PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce</i>, “(JPN) Tracking Additional Appointments (Kenmu),” Setting Up Security for Tracking Additional Appointments.

Security Type	Description
No Security	All users have access to all departments and employees.
International Security	This is a configuration option. Human resources (HR) administrators in one country might not have access to the records of employees in another country. Usually this is not a problem, but if (for example) a U.S. employee is on assignment in France, the U.S. administrator might require access to that employee's French job data in addition to the American job data. To implement this configuration, use PeopleSoft Application Designer to replace the SQL objects in the SQL viewtext for the search views that use international security. Then recreate the view with the new SQL objects. Following is a list of the international security SQL objects that you can use to replace the standard SQL objects used in the security search views: • HRSECVIEW_I_FROM • HRSECVIEWS_I_JOB • HRSECVIEWS_I_JOBFROM • HRSECVIEWS_I_SELECT • HRSECVIEWS_I_WHERE • HRSECVIEWS_I_WHEREB

See Also

PeopleTools PeopleBook: Application Designer

Page Used to Specify Security Basis

Page Name	Object Name	Navigation	Usage
Change Security Basis	CHG_SECURITY	Set Up HRMS, Security, Change Row Security Basis	Switch between Departmental Security, Additional Appointment Security JPN (for Japan only), and No Security for your data permission security type.

Specifying Security Basis

Access the Change Security Basis page.

Change Security Basis page

Important! Changing security has broad implications throughout the system. Run this process only when you first implement security or when you restructure your system in a major way.

After you change the security basis, you must recreate all views in the database.

Department Security	Select to control user access to employee data, based on the departmental hierarchy in the security tree. Department Security is the default.
Additional Appointment JPN	(JPN) If you select additional appointment security, then users who have access to the department of the additional appointment of an employee can view all data for that employee.
None	Select to <i>not</i> restrict user access to employee data. If you select None, users can view the data for each employee. You can still restrict user access to menus, components, and pages. If you select this option, the ROWSECCLASS field cannot be used as a key field or list box item for security tree. When you select this option, the FAST_SQR_SEC_VW will be modified so that all employees are returned in SQRs.
	Click this button to change the security type from the existing security type to the one that you selected.

Creating and Modifying Security Trees

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

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

This section discusses how to:

- Create a security tree manually.

- Create a security tree automatically.
- Audit a security tree.
- Modify a security tree.
- Link a security tree with row-level security and grant department access.

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

Creating Security Trees

For the purpose of building security trees, we define all entities in an organization—from companies to departments—as departments. The department data is created and stored in the Department Table, which you can access from PeopleSoft Tree Manager or the Managing Human Resources menu. You assign security access based on these departments, so define each entity in your organization in the Department Table so that its department ID code can be added to the security tree.

Trees are built with levels and nodes:

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

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

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

Security and Your Organizational Structure

Although you use your organizational structure as the foundation for your employee data security structure, the two structures are not the same. The primary difference between them is that in your security structure, you continue to maintain inactive departments. You do this so that users can retrieve data for the employees who are associated with the inactive departments. While the inactive departments don't appear in your organizational structure (that is, in your organization chart), they need to appear on your security tree; otherwise, you would have employee data that no one could access.

Unlike an organization chart, a security tree has the following characteristics:

- Only one security tree at a time can be in effect for each set ID; historical security is irrelevant.
- Inactive departments must always appear on security trees; otherwise, data for retired, terminated, or transferred employees who used to be in inactive departments will disappear.

To use trees (for reporting purposes) that accurately reflect your organization chart at a particular time, create a separate organizational tree, rather than using your security tree.

See Also

Chapter 11, “Setting Up Organization Foundation Tables,” Maintaining Departments , page 194

Creating a Security Tree Manually

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

Field	Description
Tree Name	Enter <i>DEPT_SECURITY</i> .
Structure ID	Select <i>DEPARTMENT</i> . PeopleSoft delivers the system with this structure ID set up.
Description	Enter a description of the tree.
SetID	Select the setID of the departments that you will add to the tree.
Effective Date	Enter the date that the tree becomes effective. Add only the departments that are effective on or before this date.
Status	Select the status of the tree.
Category	Select the category of the tree.
Use of Levels	Select one of the following options: • <i>Strictly Enforced</i>: Your levels consist of only one type of entity. For example, only regions report to the company level and only divisions report to the regional level. • <i>Loosely Enforced</i>: The entities combine different types of entities. For example, both regions and divisions report to the company level. • <i>Not Used</i>: Your security structure is flat, and you don't need to set up groups of units in levels.
All Detail Values in this Tree	Leave blank.
Allow Duplicate Detail Values	Leave blank.

Inserting Nodes

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

You must have a node for every department in your organization on an active security tree; otherwise, you cannot implement security for them. You can add nodes to your trees as you add departments to your organization.

See Also

PeopleTools PeopleBook: Tree Manager, "Creating Trees"

Creating a Security Tree Automatically

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

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

1. Import the entity data.

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

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

New Column	Description
PARENT_NODE_NUM	Temporary work column.
TREE_NODE_NUM	Temporary work column.
TREE_NODE_NUM_END	Temporary work column.

2. Set up the reporting hierarchy.

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

3. Build the department security tree.

- Run PER508 to build your DEPT_SECURITY tree. The effective date of the tree is the latest effective date of the departments that were processed in step 2.
- To set up multiple trees to represent security or organizational structures at different points in time, perform step 2 for each tree, setting the As of Date each time.
- Perform step 3 again.

4. Transfer department data into the department table.

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

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

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

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

PeopleTools PeopleBook: Mass Change, "Import Manager"

Auditing a Security Tree

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

See Also

Chapter 11, "Setting Up Organization Foundation Tables," Maintaining Departments , page 194

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

Chapter 9, "Administering PeopleSoft Security," Auditing a Security Tree , page 100

Modifying a Security Tree

You can modify an existing tree by changing either the nodes or the levels. When you modify a security tree, the tree node numbers usually change, so you need to refresh the numbers. You also need to run the Security Administration process to update the data access profiles and Security Fast Views, if you are using them.

Renumbering Gaps in a Security Tree

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

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

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

See Also

Chapter 9, “Administering PeopleSoft Security,” Running the Security Administration Process , page 106

PeopleTools PeopleBook: Tree Manager

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

Linking a Tree with Row-Level Security and Granting Department Access

Once you set up your security tree, you must run a process from the Security Administration page to update row-level security so that the system recognizes the current effective date of your security tree. When your security rules correspond with that date, you or your system administrator can use grant or deny access to departments.

Update row-level security when you:

- Create a security tree.
- Reorganize a security tree.
- Plan to use a tree with a different effective date.

Update data security only on the date that the new tree takes effect. The system uses the trees with the date that is closest to (but not greater than) the date that you enter when you run the security administration utility. Always perform this step when you’re ready to use the new trees.

See Also

Chapter 9, “Administering PeopleSoft Security,” Running the Security Administration Process , page 106

Auditing a Security Tree

Use the Security Tree Audit report to list discrepancies between the data you've entered in the Department Tree and the departments you've added to the current security tree.

Pages Used to Audit a Security Tree

Page Name	Object Name	Navigation	Usage
Department Tbl & Departmental	PRCSRUNCNTL	Set Up HRMS, Security, Department Security, Security Tree Audit Report	Use to create a list of discrepancies between the data you've entered in the Department Tree and the departments you've added to the current security tree.

Assigning Department Access

Indicate what kind of access users will have to the row level data of various departments for each Row Level Security Permission List. When you have saved the data on this page, you must run the Update Security Administration process.

See Also

[Chapter 9, "Administering PeopleSoft Security," Running the Security Administration Process, page 106](#)

Page Used to Grant Department Access

Page Name	Object Name	Navigation	Usage
Data Security Profiles	SCRTY_TABL_DEPT	Set Up HRMS, Security, Department Security, Setup Security Access	Grant department data access to data permission lists.

Creating Data Security Profiles

Access the Data Security Profiles page.

Data Security Profiles				
Row Security Permission List:		HCDPALL Data Permission All		
Define Security Profile				
*SetID	*DeptID		*Access Code	
AUS01	ALL DEPTS	All Departments	Read/Write	+ -
BEL01	10200	Headquarters - Belgium	Read/Write	+ -
BNCAN	B001	All Departments - 00001	Read/Write	+ -
BNUSA	B001	All Departments - 00001	Read/Write	+ -
CAN01	ALL_DEPTS	Canadian Operations	Read/Write	+ -
CDN	C20100	Office of the President (CAN)	Read/Write	+ -
CDN	C20200	Human Resources (CAN)	Read/Write	+ -
CDN	C20500	Business Services (CAN)	Read/Write	+ -
CDN	C20900	Operations Administration(CAN)	Read/Write	+ -
CHE01	10200	Headquarters	Read/Write	+ -
DEU01	10200	Headquarters	Read/Write	+ -
EBGEN	E000	ST - President	Read/Write	+ -
EBGEN	E001	ST - HR Department	Read/Write	+ -
EBGEN	E002	ST - Payroll Department	Read/Write	+ -
EBGEN	E003	ST - Information Systems	Read/Write	+ -
EBGEN	E004	ST - Administration Department	Read/Write	+ -

Data Security Profiles page

Each Department ID to which you are granting access on this page must have a node on an active security tree. Also, you must have run the Security Administration process, with the Update Security check box selected, at least once.

The PeopleSoft HRMS naming convention for data permission lists is DPXXXXX. This component can be accessed only for row security permission lists that begin with *DP*.

SetID and DeptID (department ID)

Enter the SetID and the ID of the department that you are granting access to. On the security tree, the row security permission list has access to each department ID that reports up to this one (unless you specify otherwise), so you don't have to select each department ID individually. For example, if department IDs 510, 540, and 570 report to department ID 500, select only department ID 500 on this page to grant this row security permission list access to all four departments.

To restrict access to one or more departments that report up to a department ID that you've granted access to, insert a row and select the restricted department's ID. Using the example in the preceding paragraph, if you want the permission list to have access only to department IDs 500, 510, and 570, you first grant access to department ID 500. Then you insert a second row and restrict access to department ID 540.

In a third scenario, you grant access to a level 3 entity, not to a level 4 entity, but to a level 5 entity that reports to the level 4 entity. To do that, you grant access to the level 3 entity, deny access to the level 4 entity, and grant access to the level 5 entity.

You need to restrict access explicitly only for department IDs that report up to the department ID to which you want to grant access. Otherwise, the row security permission list doesn't have access to a department ID unless the list or the department ID to which it reports has been granted access on this page.

Access Code

Indicate what kind of access the row security permission list has to the data for this department ID.

Creating Security Fast Views

As explained in Understanding Data Permission Security, the system uses search views to enforce security. The system retrieves only the employee data rows to which the user's data permission list grants them access. The system searches through several tables to find the security tree and job data information that it needs. This can be slow when you have a large number of records in your system. Fast views can be substituted for the delivered security search views to provide faster search results.

Fast views load security tree and job data information into a pre-indexed table. When you open a component and enter information on the search page, the system uses Security Fast Views to retrieve the data from that table. The index makes the search more efficient, so the data is retrieved more quickly.

The drawback is that the data in the tables is static, and changes that are made to records throughout the day aren't reflected in the records in the tables. Therefore, when you retrieve a record with Security Fast Views, you aren't necessarily looking at the most recent data. To keep the data current, you must refresh the tables periodically.

In this section, we describe the Security Fast Views options and how to implement them. As delivered, only the components that have PERS_SRCH_GBL or EMPLMT_SRCH_GBL as search records can be assigned a Security Fast View.

Types of Fast Views

PeopleSoft HRMS delivers three Fast View tables, which are based on different views. The one you use depends on your needs.

Fast View Table 1

When you use Fast View Table 1, you load a pre-indexed table (FAST_SCRTY_1) with your security tree information matched with the content of your job data record. Because this application makes so much data available on a single pre-indexed table, system performance is greatly enhanced. However, you need to refresh this table regularly to ensure that your users are working with the most recent employee data.

The following table lists the default global security views in PeopleSoft HRMS and the appropriate Fast View Table 1 replacement view:

Default Search View	Fast View	Based on This Table
PERS_SRCH_GBL	FAST_PERSGL_VW1	FAST_SCRTY_1
EMPLMT_SRCH_GBL	FAST_EMPGL_VW1 FAST_EMPADD_VW1 (used when the component is entered in Add mode).	FAST_SCRTY_1

Fast View Table 2

When you use Fast View Table 2, you load a pre-indexed table (FAST_SCRTY_2) containing your security tree information. The security search view still joins to your live job data. The views based on this table aren't as fast as those that work with the FAST_SCRTY_1 table, but they still greatly improve system performance because key joins and indexing have been done ahead of time.

While your department and security tree data are static in this view, this data is usually less volatile, and you can access real-time changes to the rest of your Human Resources data. However, you must refresh this table whenever your department information or security tree changes to ensure that your users have the most recent security access.

The following table lists the default global security views in PeopleSoft HRMS and the appropriate Fast View Table 2 replacement view:

Default Search View	Fast View	Based on This Table
PERS_SRCH_GBL	FAST_PERSGL_VW2 (for online access) FAST_SQR_SEC_VW (for security enabled SQRs)	FAST_SCRTY_2
EMPLMT_SRCH_GBL	FAST_EMPLMTGL_VW2	FAST_SCRTY_2

Fast View Table 3

When you use Fast View Table 3 in conjunction with Fast View Table 2, you load a pre-indexed table (FAST_EMP_BEN_1) with only your security tree information. The security search view still joins to your live job data.

You use Fast View Table 3 when you are using PeopleSoft Benefits Administration *and* you have Multiple Jobs selected. If you are using PeopleSoft Benefits Administration but *not* Multiple Jobs, use Fast View Table 1 or 2.

Note. Always use Fast View Table 3 in conjunction with Fast View Table 2.

Default Search View	Fast View	Based on This Table
EMP_BEN_SRCH_MJ	FAST_EMP_BEN_2	FAST_EMP_BEN_1

Choosing Fast View Table 1 or 2

Implementing Fast View Table 1 provides the greatest system response time gains, but before you decide which security search view option works best for your implementation of PeopleSoft HRMS, consider your special needs and weigh the performance and accuracy issues carefully.

Implementing Fast Views

Switching to Security Fast Views requires the use of PeopleSoft Application Engine, Application Designer, and Process Scheduler. We recommend that the database administrator, or someone who is familiar with those tools, perform this implementation.

Also consider your available disk space and processing time. The flat tables that are generated by PeopleSoft Application Engine HR_FASTVIEW might be large, depending on your system. They can take up a lot of disk space and take some time to generate. Before you go live with any fast search view changes, we advise that you run batch processes to evaluate the size of the Fast View table, how long it takes to generate the table, and so forth. Remember that you can use PeopleSoft Process Scheduler from PeopleSoft Application Engine to schedule the application to run during off-peak hours.

To implement new fast security search views on your human resources system:

Perform steps 1 through 5 only once to set up Security Fast Views. Perform step 6 for ongoing maintenance.

1. In PeopleSoft Application Designer, verify that your tables are created properly.
Verify that the Fast View table you are using (FAST_SCRTY_1, FAST_SCRTY_2, or FAST_EMP_BEN_2) is in place and ready to receive data.
2. In PeopleSoft Application Designer, create the view.
 - a. Use the SQL create command to create the views that run off the Fast View table that you are using.
 - b. Exit PeopleSoft Application Designer.
3. In PeopleSoft Application Engine, run HR_FASTVIEW to insert data into the indexed tables.
 - a. From the Security Administration page, run Security Fast Views.
 - b. Select the refresh type that you are using:
 - Select Refresh Type 1 to refresh the Fast View Table 1, FAST_SCRTY_1.
 - Select Refresh Type 2 to refresh the Fast View Table 2, FAST_SCRTY_2.
 - Select Refresh Type 3 to refresh the Fast View Table 3, FAST_EMP_BEN_1.

When you run HR_FASTVIEW, the system populates and indexes your human resources data into the flat tables that Security Fast Views references when you access your human resources database.
4. Check the PeopleSoft Application Engine results.

Before you assign the Security Fast View to your system and before you switch the search records using PeopleSoft Application Designer, make sure that PeopleSoft Application Engine has populated the Fast View tables as you expected. Query the Fast View tables to confirm that the data is there.

5. Assign the new security fast view to PeopleSoft HRMS components using PeopleSoft Application Designer.

a. Open PeopleSoft Application Designer.

As delivered, only components that have PERS_SRCH_GBL or EMPLMT_SRCH_GBL as search records can be assigned a security fast view.

b. Select *File, Open, Object Type, and Menu*.

The system displays the Open Object page.

c. Select a menu item from the list under Objects Matching Selection Criteria. For example, select ADMINISTER_WORKFORCE_(GBL) to display the ADMINISTER_WORKFORCE_(GBL) menu.

d. From the menu, select the component that you want switched to Security Fast Views.

Continuing with the example, to apply Security Fast Views to the Personal Data component, select *Use, Personal Data*, and double-click Personal Data. The system displays the Menu Item Properties page for the Personal Data menu item. In this example, the fast view FAST_PERSGL_VW1 replaces the default view PERS_SRCH_GBL.

e. On the Menu Item Properties page, select the Override check box and select a fast view to replace the default *Search Rec* (search record) value. In this example, the fast view FAST_PERSGL_VW1 replaces the default view PERS_SRCH_GBL.

f. Save your changes and close PeopleSoft Application Designer.

6. Refresh the indexed flat tables.

The data in the indexed flat tables is only as current as the last time they were refreshed. To keep the data up to date, refresh the data regularly using the Security Administration page. You may want to use PeopleSoft Process Scheduler to specify refreshing the tables once a day, once every few days, once a week, and so forth, depending on the Fast Security View option that you've implemented, and your own data requirements.

See Also

[Chapter 9, "Administering PeopleSoft Security," Running the Security Administration Process, page 106](#)

PeopleTools PeopleBook: Process Scheduler

Updating Data Access Profiles and Security Fast Views

Update your data access profiles and security fast views periodically so that they are based on the most current information.

Updating Data Access Profile

Update your data access profile when:

- You create or modify your security tree.

- You use a tree with a different effective date.

Update row-level security on the date (not before the date) that the new tree takes effect. The system uses the trees with the date that is closest to (but not greater than) the date that you enter when you run the utility.

Updating Security Fast Views

Refresh Fast View Table 1 when:

- You reorganize your security tree.
- You use a different security tree.
- Your job data that affects access rights (such as a department change or promotion) changes.

Note. Because changes to job data happen daily, we recommend running this process nightly so that the system retrieves the most recent data.

Refresh Fast View Table 2 (and Fast View Table 3, if you are using it) when:

- You reorganize your security tree.
- You use a different security tree.

Page Used to Update Row-Level Security and Security Fast Views

Page Name	Object Name	Navigation	Usage
Security Administration	RUNCTL_FASTVW	Set Up HRMS, Security, Department Security, Update Dept Security	Update your security tree row-level security and Security Fast Views, if you are using them.
Active Dept Security Tree	SECURITY_TREE_SEC	Click the View Security Trees button on the Security Administration page.	View a list of active security trees.

Running the Security Administration Process

Access the Security Administration page.

Security Administration page

Update Row Level Security?

Update Row Level Security?

Select to update the data access profile to correspond to your security tree information.

As Of Date

Select the date that you update your security tree. Update row-level security only on the date that the new tree takes effect. For each setID, the system uses the tree with the date that is closest to (but not greater than) the date that you enter when you run the Security Administration process.

View Security Trees

Click to display the

Fast Views

Re-Fresh Type 1

Select to refresh Fast View Table 1.

Re-Fresh Type 2

Select to refresh Fast View Table 2.

Re-Fresh Type 3

Select to refresh Fast View Table 3.

Click Run to run this request. PeopleSoft Process Scheduler runs the update row-level security process at user-defined intervals.

Review Active Security Trees

Click the View Security Trees button on the Security Administration page.

Active Dept Security Tree			
Customize Find View All 		First 	1-8 of
		51 	Last
SetID	Effective Date of Tree		
AUS01	01/01/1980		
BEL01	01/01/1980		
BNCAN	01/01/1980		
BNUSA	01/01/1996		
CAN01	01/01/1990		
CDN	01/01/1980		
CHE01	01/01/1998		
DEV01	01/01/2001		

Active Dept Security Tree page

The Active Dept Security Tree page displays a list of the active security trees and their effective dates.

Creating Row Security for Managers

Use the Create Row Level Security for Dept Managers process to grant the appropriate row-level security access for department managers. The process:

- Creates a row security permission list, if one does not already exist, providing the manager with access to all departments (and sub-departments) that they are assigned to.
- Updates a manager's existing row security permission list.
- Removes access if the employee is no longer a manager.

Pages Used to Process Row Security for Managers

Page Name	Object Name	Navigation	Usage
Create Row Security for Mgr (create row security for manager)	RUNCTL_PER510	Set Up HRMS, Security, Department Security, Create Row Security for Mgr	Use the create and update manager row security permission lists.

Processing Row Security for Managers

Access the Create Row Security for Mgr page.

Create Row Security for Mgr

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

Language: English

Report Parameters

As Of Date:

Create new User IDs based on

User ID:

☐ Create Users as locked ?

Create Row Security for Mgr page

- As Of Date** Select the date as of which the row security list permission list should become effective.
- User ID** Select a default User ID. The system will base the new userIDs on the format of this default.
- Create User as Locked?** Select to lock all the new userIDs.

Creating and Locking UserIDs

Create userIDs for your employees using Group Build and the Create Users page. Create and populate a group using Group Build and then use the Create Users page to create UserIDs for each group member.

Use the Lock Users page to lock userIDs until you are ready to use them.

Pages Used to Create and Lock UserIDs

Page Name	Object Name	Navigation	Usage
Create Users	CREATE_USERS	Set Up HRMS, Security, User Maintenance, Create Users	User to create userIDs for a group of employees.
Lock Users	LOCK_USERS	Set Up HRMS, Security, User Maintenance, Lock Users	Use to lock userIDs.

Creating Users

Access the Create Users page.

Create Users

Populate Group

Group ID: EI001

Populate Group

Create User IDs Based on

User ID: [PS] HRMS Australia - User

☐ Create Users as locked ?

Create User IDs

Customize Find					First	1-173 of 173	Last
EmplID	Name	User ID	Account Locked Out?				
1 E100	Alexander, Jones	E100	☐				
2 E101	Nigh, Ian	E101	☐				
3 E102	Vera, Eduardo	E102	☐				
4 E103	Camou, Ximena	E103	☐				
5 E104	PKSTaniva, Martha	E104	☐				
6 E105	Foster, Samuel	E105	☐				
7 E106	Cancino, Ernesto	E106	☐				
8 E107	Bucio, Willebaldo	E107	☐				
9 E108	Murillo, Patricia	E108	☐				
10 E109	Rahimi, Omid	E109	☐				

Create Users page

Group ID

Select the ID of the group whose members require userIDs.

Populate Group

Click to populate the page with the group members.

User ID

Select a default User ID. The system will base the new userIDs on the format of this default.

Create User as Locked?

Select to lock all the new userIDs.

Create User IDs

Select to create the new userIDs.

EmplID and Name

Displays the employee IDs and names of the employees in the selected group.

User ID

Displays the userIDs of the employees once you've clicked the Create User IDs button.

Account Locked Out?

The system selects this option if the userID account is locked out.

Locking Users

Access the Lock Users page.

	EmplID	Name	User ID	Account Locked Out?		
1	E100	Alexander, Jones	E100	☒	+	-
2	E101	Nigh, Ian	E101	☒	+	-
3	E102	Vera, Eduardo	E102	☒	+	-
4	E103	Camou, Ximena	E103	☒	+	-
5	E104	PKSTaniva, Martha	E104	☒	+	-
6	E105	Foster, Samuel	E105	☒	+	-
7	E106	Cancino, Ernesto	E106	☒	+	-
8	E107	Bucio, Willebaldo	E107	☒	+	-

Lock Users page

Group ID

Select the ID of the group whose userIDs you want to lock or unlock.

Populate Group

Click to populate the page with the group members.

Lock Group

Click to lock the userIDs of the entire group.

Unlock Group

Click to unlock the userIDs of the entire group.

EmplID and Name

Displays the employee IDs and names of the employees in the selected group.

User ID

Displays the userIDs of the employees once you've clicked the Create User IDs button.

Account Locked Out?

The system selects this option if the userID account is locked out.

Setting Up Security for Applicant Data

Before you set up applicant security, you must create security classes for your organization and define your department security tree.

Page Used to Set Up Security for Applicant Data

Page Name	Object Name	Navigation	Usage
Applicant Security	SCRTY_TBL_APP	Set Up HRMS, Security, Setup Applicant Security	Set up access to applicant data. You can assign access from this page to applicant data for all or selected companies, business units, and locations.

Setting Up Security for Applicant Data

Access the Applicant Security page.

Applicant Security page

On this page, you define applicant security for data permission lists, which are assigned to users in the User Profile component.

Access to Open Applications

Select to give the selected security class access to all applicants who aren't linked to a requisition.

Access to all Companies

Select to give the selected security class access to applicant data in all companies.

When you select this check box, the Company field is unavailable for entry.

Access to all Business Units

Select to give the security class access to applications for all business units.

When you select this check box, the fields in the Included Business Units group box and Included Locations grid are unavailable for entry.

Included Companies

Select included companies.

Included Business Units

Business Unit

Select from the list of values. Add business units as needed.

If you select the Access to all Business Units check box, the Business Unit field is unavailable for entry.

Access to all Locations

Select to give the security class access to all locations within the selected business unit.

If you select this check box, the Included Locations grid is unavailable for entry.

Included Locations

Select included locations.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Creating and Posting Job Requisitions”

Setting Up Security for Local Functionality

Local functionality refers to local functionality that is specific to a country. Country-specific functionality is in collapsible sections, marked by the country’s flag, in the global components. To grant user access to local components, you use component permission. To grant user access to the local functionality on those components, you use the Maintain Global Security page.

To set up security and grant users access to local country functionality on the global menus:

1. Use the Installation Table 3 page to indicate the local country functionality that is installed as part of your PeopleSoft HRMS system.
If a country is not specified, its local functionality can’t be accessed.
2. Grant the primary permission lists access to country-specific functionality using the Maintain Global Security page.
3. Assign a user access to a primary permission list containing access to the countries that are required by the user on the User Profile - General page.

See Also

PeopleTools PeopleBook: Security, “Working With Permission Lists”

Pages Used to Grant Access to Local Country Functionality

Page Name	Object Name	Navigation	Usage
Global Panels	SCRTY_TBL_GBL	Set Up HRMS, Security, Setup Global Security	Select which local country functionality a primary permission list can access. You can also establish component-level security for local functionality. You can hide the local functionality in a component to which a permission list has access, even when the permission list can access that country's functionality in other components.
Global Panels - Excluded Panelgroups	SCRTY_GBL_SEC	Click the Excluded Components link on the Maintain Global Security page.	Select the components for which the local functionality for this country row should be hidden.

Granting Access to Local Country Functionality

Access the Global Panels page.

Global Panels

Primary Permission List: HCPPEG Primary List - EG

Security Detail		Customize Find	First	1-2 of 2	Last
*Country	Description	Excluded Components			
CAN	Canada	Excluded Components	+	-	
USA	United States	Excluded Components	+	-	

Global Panels page

Global security is driven by the primary permission list that is linked to the user, so only permission lists that follow the PeopleSoft HRMS naming convention PPXXXX can be accessed here.

Primary Permission List Users assigned to this permission list can access the local functionality of the countries that you indicate on this page. Primary permission lists are defined in the Permission List component. Users are assigned a primary permission list on the User Profile - General page.

Country Select the country or countries whose local functionality users assigned to the primary permission list can access in global components.

Excluded Components When you click Excluded Components, the system displays the Restricting Access to Local Country Functionality. Using this page, you can restrict access to country-specific functionality in components. For example, you can restrict a group of users' access to Italian-specific functionality on the Personal Data component, while not restricting their access to the Personal Data component or to Italian functionality in other components.

See Chapter 11, “Setting Up Organization Foundation Tables,” Setting Up Primary Permission List Preferences, page 204.

Restricting Access to Local Country Functionality

Access the Global Panels - Excluded Panelgroups page.

Global Panels - Excluded Panelgroups page

Component Name Select the name of the component for which global functionality for this country is being restricted. For example, to restrict access to Italian-specific functionality in the Personal Data component, select the Personal Data component.

Modifying Data Permission Security

PeopleSoft HRMS provides a security structure that uses organizational entities in a hierarchical format. When you grant or restrict user access to organizational entities, you use data permission lists. This type of security structure works best in the following circumstances:

- Users have access to data for employees in specific parts of your organization.
- Your security structure is largely based on your organizational structure.
- The structure is hierarchical.

You don't have to grant and deny access to each organizational entity every time you make changes. Effective dates and the hierarchical format of the trees simplify maintenance.

You might want to modify your security, to prevent users from hiring or transferring employees into departments for which they don't have access, or you might want to allow users to update their own data on components other than the self-service internet applications.

Modifying Security for Hiring and Transferring Employees

PeopleSoft HRMS enables users to assign employees into departments that they can't access for updates. To prevent a user without access from transferring an employee into a department, PeopleSoft HRMS contains a view, DEPT_TBL_ACCESS, that shows only the department IDs that the user is authorized to access.

If you use this view, you need to create a class of users who can access all departments so that they can perform transfers. Also, update the Job record definition in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_TBL_ACCESS.

See Also

PeopleTools PeopleBook: Application Designer

Allowing Employees to Update Their Own Data

PeopleSoft HRMS doesn't allow users to update their own data except in the self-service internet applications. However, sometimes you might want them to update some of their own data in other components. To allow users to update their own data, you implement the PeopleCode function Allow EmplIDChg (allow employee ID change). The function looks for a single Boolean parameter. When the parameter is set to true, employees can update their own data; when it is set to false, they cannot.

For example, to allow employees to change their own personal data, you enable the PeopleCode function for PERSONAL_DATA, the underlying record definition for the Personal Data component. Then employees can change their personal data, but not their job information.

To enable the Allow EmplIDChg function:

1. Open the record PERSON in PeopleSoft Application Designer.
2. Open the RowInit PeopleCode on the EMPLID field.
3. Insert new code after this line:

```
/****** START OF ROW INIT PEOPLECODE *****/
```

4. Insert a row and enter the following code after the first line (a comment) of existing code:

```
if %Page = PAGE.PERSONAL_DATA1B then

    AllowEmplidChg(true);

end-if;
```

5. Save your changes and exit the PeopleCode page.

Employees can now update their own data using the Personal Data page.

To allow employees to update their own data in other places in PeopleSoft HRMS, enter this PeopleCode function in the underlying record definition for each page where you want to allow updates.

Security Search Views

Use the project HRSECVIEWS to view a list of all the security views.

Warning! When you modify security search views, each view must be altered appropriately; otherwise your security is compromised.

CHAPTER 10

Installing PeopleSoft HRMS

Before you can start to use PeopleSoft HRMS, you must set up tables related to your installation. This section discusses how to set up:

- Installation settings.
- Country codes.
- State and province codes.
- Regulatory regions.
- Regional transaction codes.

Setting Up Implementation Defaults

For every site where you implement PeopleSoft HRMS, you must complete the Installation Table to specify various defaults, processing rules, and counters for the system to use. You can have only one set of installation information for each site; this information is *required*.

This section discusses how to:

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

Warning! You must complete the information on the Primary Permission List Preferences page for each Primary Permission List. Most of the defaults in PeopleSoft HRMS come from the Primary Permission List Preferences page and not the Installation Table pages. Other PeopleSoft HRMS applications have defaults that are based on the Installation Table settings. However, in PeopleSoft Human Resources, all defaults are based on the settings that you make on the Primary Permission List Preferences page. There are some exceptions to this rule in PeopleSoft Human Resources, and they are noted in the default field level discussion.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences](#), page 204.

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

Pages Used to Set Up and Report on Implementation Defaults

Page Name	Object Name	Navigation	Usage
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table	Specify the PeopleSoft applications for your installation.
HRMS Options	INSTALLATION_TBL1B	Set Up HRMS, Install, Installation Table	Specify how to drive your system: by employee, by position, or both. Enter the PeopleSoft HRMS defaults that are related to your organizational policies.
Product Specific	INSTALLATION_TBL1A	Set Up HRMS, Install, Installation Table	Enter product- and industry-specific installation information.
Country Specific	INSTALLATION_TBL3	Set Up HRMS, Install, Installation Table	Enter country-specific installation information.
Installed HR Countries	INSTALLATION_SEC	Click the Installed Countries link on the Installation Table - Country Specific page.	Specify which local country functionality to activate for users in PeopleSoft Human Resources.
Last ID Assigned	INSTALLATION_TBL2	Set Up HRMS, Install, Installation Table	Specify the number that the system uses to start assigning numbers.
Third Party/System	INSTALLATION_TBL4	Set Up HRMS, Install, Installation Table	Set the criteria for gathering statistics and activate the SQR security for PeopleSoft HRMS. Define parameters for using third-party applications such as Visio.
Alternate Character	ALT_CHAR_TBL	Set Up HRMS, Install, Installation Table	Specify the language code and alternate character type.
Installation Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Install, Installation Table Report	Run the Installation Table report (PER702). This report lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.

Selecting PeopleSoft Applications for Your Installation

Access the Products page.

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System
Installed Products					
☒ Human Resources	☒ Education and Government	☒ eBenefits			
☒ Benefits Administration	☒ Federal	☒ eDevelopment			
☒ FSA Claims Administration	☒ French Public Sector	☒ eCompensation			
☒ Pension Administration	☒ Currency Conversion Utility	☒ eEquity			
☒ Stock Administration	☒ Pay/Bill Management	☒ ePay			
☒ Time and Labor	☒ Directory Interface	☒ eProfile			
☒ Mobile Time Management	☒ Catalog Management	☒ eRecruit			
☒ Resume Processing	☒ Employee Portal	☒ ePerformance			
☒ Payroll for North America	☒ Government Portal	☒ eComp Mgr			
☒ Payroll Interface	☒ Campus Portal	☒ eProfile Mgr			
☒ Global Payroll Core	☒ HRMS Portal Pack	☒ eRecruit Mgr			
Installed GP Countries	☒ General Ledger				

Products page

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

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

(USF) Setting Up PeopleSoft HRMS for Federal Functionality

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

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

Selecting HRMS Options

Access the HRMS Options page.

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System
HRMS Defaults					
Company: GBI Q Global Business Institute					
Standard Hours			Position Management Option		
Min Standard Hours: 10.00			☐ Full		
Max Standard Hours: 40.00			☒ Partial		
*Default Standard Hours: 40.00			☐ None		
Work Period: W Q Weekly					
Compensation Rate Codes			Currency		
*Default Comp Frequency: M Q Monthly			☒ Multi-Currency		
☒ Use Rate Code Groups			*Base Currency: USD Q		
☒ Use Salary Points			Rate Type: OFFIC Q		
☒ Multi-Step Grade					

HRMS Options page

Company

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

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

Standard Hours

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

Min Standard Hours
(minimum standard hours)
and **Max Standard Hours**
(maximum standard hours)

Enter the minimum and maximum standard hours that employees are expected to work per week. The system enters this information as default values but you can override the values on either the Job Code or Position Data components.

Default Standard Hours

Enter the number of hours in a normal workweek at the company. This is a required field. When you define new primary permission list preferences for a primary permission list, the standard hours appear by default from the Installation Table. The value that you enter also becomes the default standard hours value for a job in the Job Code Table and the default standard hours value in the Salary Administration Table. If you're driving your system by positions, the hours in the salary administration plan of the position's location or the hours in the Job Code Table appear as the default on the Position Data pages.

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

and hourly employees. To compute the FTE value, the system checks Position Data to see if standard hours are specified. If they aren't, the system uses the standard hours in the Job Code Table.

Work Period

Select a standard work period (the time period in which employees must complete the standard hours). Values are stored on the Frequency Table.

The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE.

See [Chapter 13, “Setting Up Jobs,” Classifying Jobs](#), page 227.

See [Chapter 8, “Using Frequencies,” Defining a Frequency ID, Type, and Annualization Factor](#), page 83.

Position Management Option

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

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

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

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

Compensation Rate Codes

Default Comp Frequency (default compensation frequency)	Select the value to use for reporting salaries. This field is required. The system also uses this value as the default compensation frequency in the Job Code Table.

See [Chapter 13, “Setting Up Jobs,” Classifying Jobs](#), page 227.

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

Currency

Multi-Currency

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

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

Base Currency

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

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

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

See *PeopleSoft Common Components: Currencies*

Rate Type

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

See Also

Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences , page 204

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

Chapter 2, "Using PeopleSoft HRMS," Driving Your System by Employee or Position , page 6

PeopleSoft Human Resources PeopleBook: Plan Salaries

Chapter 6, "Working With Currencies ," page 51

Entering Product- and Industry-Specific Installation Information

Access the Product Specific page.

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System	▶
Benefits Functions ☐ FMLA Administration ☒ COBRA Administration ☒ Benefits Billing ☒ Retroactive Benefits/Deduction Start Date for BenAdmin: 01/01/1999 NA Payroll / Payroll Interface ☒ Concurrent Calc/Confirm ☒ Automatic Employee Tax Data ☒ Use State Residence for Local Human Resources ☒ Multi-Company Organization ☒ Multiple Jobs Allowed ☒ Automatic Job Termination ☒ Automatic Job Suspension Temporary SSN Mask: 999 EMPLID Field Length: 4						
Federal Functionality *Default Pay Basis: Per Annum T&L / NA Payroll Paysheet Opt ☒ Change Final Check ☒ Change Online Check ☒ Change Reversal Adjustments ☒ Load in Preliminary Calc						
AP Invoice Number Prefix AP Inv. Prefix: H						

Product Specific page

Benefits Functions

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

Select to activate these different types of benefits functionality.

Start Date for BenAdmin
(start date for Benefits
Administration)

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

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

Concurrent Calc/Confirm
(concurrent calculation and
confirmation)

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

**Automatic Employee
Tax Data**

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

- You hire an employee.
- An employee has a job change requiring a new work tax location.
- You add a concurrent job that requires a new work tax location for an employee.
- You hire an employee from the Applicant Tracking System.

- An employee transfers to a new company.

Use State Residence for Local

Automatically selected when you select Automatic Employee Tax Data. Leave this field selected to assume that an employee is a resident of any local tax jurisdiction that happens to be located in the employee's state of residence. If this assumption is not true, deselect this field to prevent resident local taxes from being erroneously deducted from an employee's paycheck.

Human Resources

Multi-Company Organization

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

Multiple Jobs Allowed

Select to set up multiple, concurrent jobs for employees in your organization. For example, you work for a university where the dean of the Marketing Department is also a professor.

Automatic Job Termination

Select to automatically terminate any job that has an end date. The system does this by creating a termination row for the job.

Automatic Job Suspension

Select to activate substantive job suspension for employees working in temporary assignments where the substantive job requires suspension for the duration of the assignments.

The Multiple Jobs Allowed check box must also be selected if you want to select this option.

'Temporary SSN' Mask (temporary Social Security number mask)

Enter a three-digit number to be a default Social Security number for all applicants or employees whose Social Security numbers are unavailable. Assign a value that is greater than 800 so that the temporary number doesn't conflict with valid Social Security numbers.

EMPLID Field Length (employee ID field length)

Enter the number of characters to be used for employee IDs.

(USF) Federal Functionality

Default Pay Basis

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

AP Invoice Number Prefix (Accounts Payable number prefix)

AP Inv. Prefix (Accounts Payable invoice prefix)

Enter a prefix to be used for accounts payable invoices.

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

Change Final Check, Change Online Check, and Change Reversal Adjustments

Select to enable payroll users to make paysheet changes to data that is retrieved from PeopleSoft Time and Labor. PeopleSoft recommends not selecting these check boxes because changes that are made directly to the paysheets aren't transmitted to PeopleSoft Time and Labor.

Refresh on Job Change

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

Load in Preliminary Cal (load in preliminary calculations)

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

See Also

PeopleSoft 8.8 Benefits Administration PeopleBook, "Working With PeopleSoft Benefits Administration," Automating Benefit Information

Entering Country-Specific Installation Information

Access the Country Specific page.

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned
Country Country: USA USA Lang Cd: ENG English Installed HR Countries				
Canadian Parameters Last ROE #: 1 Last Dir Dep File Creation #: 14 *Census Metro Area: (Invalid Value) Last FSA CarryForward Claim #: *Industrial Sector: Char Banks Last CPS Transmission ID #:				
Australian Parameters ☒ Education & Government				
Japanese Parameters ☒ Additional Appointment Enabled				

Country Specific page

Country

Country and Lang Cd (language code)	Select a country for the system to enter as a default value. The system displays the code of the language spoken in the selected country.
Installed HR Countries	Select this link to go to the Installed HR Countries page, where you can select which local country functionality is installed in the system.

(CAN) Canadian Parameters

Last ROE # (last record of employment number), Last Dir Dep File Creation # (last direct deposit file creation number), Last FSA CarryForward Claim # (last flexible spending account carry-forward claim number), and Last CPS Transmission ID # (last CPS transmission ID number)	Enter the last ROE, direct deposit file, flexible spending account carry-forward claim, and CPS transmission ID numbers that were used. The system increases each number by one when it assigns a new number. The system also updates the Installation Table every time it assigns a number. These values are used in PeopleSoft Payroll for North America when running a Canadian payroll.
Census Metro Area (census metropolitan area)	Enter the Census Metro Area (CMA) code that is prescribed by Statistics Canada for this location. The system uses the default CMA code that you enter only if no default CMA code is specified on the Primary Permission List Preferences page. CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required for Canadian companies.

See [Chapter 11, “Setting Up Organization Foundation Tables,” Setting Up Primary Permission List Preferences](#), page 204.

Industrial Sector	Used for Canadian employment equity purposes. The system uses the default value that you enter only if no default industrial sector is specified on the Primary Permission List Preferences page. This value is used as the default for the Canadian Industrial Sector field in the Department Table; and it identifies the industrial sector with which employees in a given department are associated. This field is required.

See [Chapter 11, “Setting Up Organization Foundation Tables,” Setting Up Primary Permission List Preferences](#), page 204.

See [Chapter 11, “Setting Up Organization Foundation Tables,” Maintaining Departments](#), page 194.

(AUS) Australian Parameters

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

(JPN) Japanese Parameters

Additional Appointment Enabled

Select if you will be implementing Additional Appointment tracking (*Kenmu*). Selecting this check box activates functionality to create a dummy additional appointment job code when you create a new business unit.

See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “(JPN) Tracking Additional Appointments (Kenmu)”.

Selecting Local Country Functionality

Access the Installed HR Countries page.

Installed HR Countries	
☒ AUS - Australia	☒ IND - India
☒ BEL - Belgium	☒ ITA - Italy
☒ BRA - Brazil	☒ JPN - Japan
☒ CAN - Canada	☒ MEX - Mexico
☒ CHE - Switzerland	☒ MYS - Malaysia
☒ DEU - Germany	☒ NLD - Netherlands
☒ ESP - Spain	☒ NZL - New Zealand
☒ FRA - France	☒ SGP - Singapore
☒ GBR - United Kingdom	☒ USA - United States
☒ HKG - Hong Kong	

Country Specific - Installed HR Countries page

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

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

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

See *PeopleSoft 8.8 Benefits Administration PeopleBook*, “Working With PeopleSoft Benefits Administration,” Automating Benefit Information.

Specifying the Starting Number for System-Assigned Numbers

Access the Last ID Assigned page.

Products	HRMS Options	Product Specific	Country Specific	Last ID Assigned	Third Party/System
Last Employee ID Assigned:		1		Last H/S Claim # Assigned: 94000	
Last H/S Non-Employee ID Assgn:		150		Last Incident # Used: 16	
Last TL Contractor ID Assigned:				Last Journal # Assigned:	
Last COBRA Emplid Assigned:		10001		Last Help Context # Used: 10000000	
Last Position # Used:				Last Retro Pay Request Seq #: 134131	
Last Grievance # Used:				Last Retro Ded Request Seq #:	
Last Car # Assigned:		16		Last FSA Claim # Assigned: 10039	
Last Demand ID Assigned:		19		Last Illness # Assigned:	
Last Account Cd Assigned:				Last Illness Report # Assigned:	
Last AP Invoice Number:				Last Temp Assignment # Used:	
				Last Used Element Number: 170632	

Last ID Assigned page

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

The following table lists auto-numbering fields.

Field	Application	Business Process
Last Employee ID Assigned	PeopleSoft Human Resources	Administer Workforce Recruiting Workforce
Last H&S Non-Employee ID Assgn	PeopleSoft Human Resources	Monitor Health and Safety Administer Training
Last TL Contractor ID Assigned	PeopleSoft Time and Labor	Administer Workforce
Last COBRA Emplid Assigned	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Administering COBRA
Last Position # Used	PeopleSoft Human Resources	Manage Positions Plan Successions
Last Grievance # Used	PeopleSoft Human Resources	Manage Labor Relations
Last Car # Used	PeopleSoft Human Resources	Administer Company Cars
Last Demand ID Assigned	PeopleSoft Human Resources	Budget Training
Last Account Cd Assigned	PeopleSoft Human Resources	

Field	Application	Business Process
Last AP Invoice Number	PeopleSoft Human Resources	
Last H/S Claim # Assigned	PeopleSoft Human Resources	Monitor Health and Safety
Last Incident # Used	PeopleSoft Human Resources	Monitor Health and Safety
Last Journal # Assigned	PeopleSoft Payroll for North America	Administer GL Interface
Last Help Context # Used	PeopleSoft HRMS	Customizing Windows Online Help
Last Retro Pay Request Seq #	PeopleSoft Payroll for North America	Manage Retroactive Pay
Last Retro Ded Request Seq #	PeopleSoft Benefits Administration PeopleSoft Human Resources: Base Benefits	Manage Retroactive Benefits/Deductions
Last FSA Claim # Assigned	PeopleSoft FSA Claims Administration	Administer FSA
Last Illness # Assigned	PeopleSoft Human Resources	Monitor Absence
Last Illness # Report Assigned	PeopleSoft Human Resources	Monitor Absence
Last Temp Assignment # Used	PeopleSoft Human Resources	Administer Workforce
Last Used Element Number	PeopleSoft Human Resources	Manage Competencies

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

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

Employee ID Considerations

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

To always enter applicant and employee IDs manually, enter *99999999* (nine 9's) in the Last Employee ID Assigned and Last Applicant ID Assigned fields.

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

Zero-filled Numbers

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

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

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

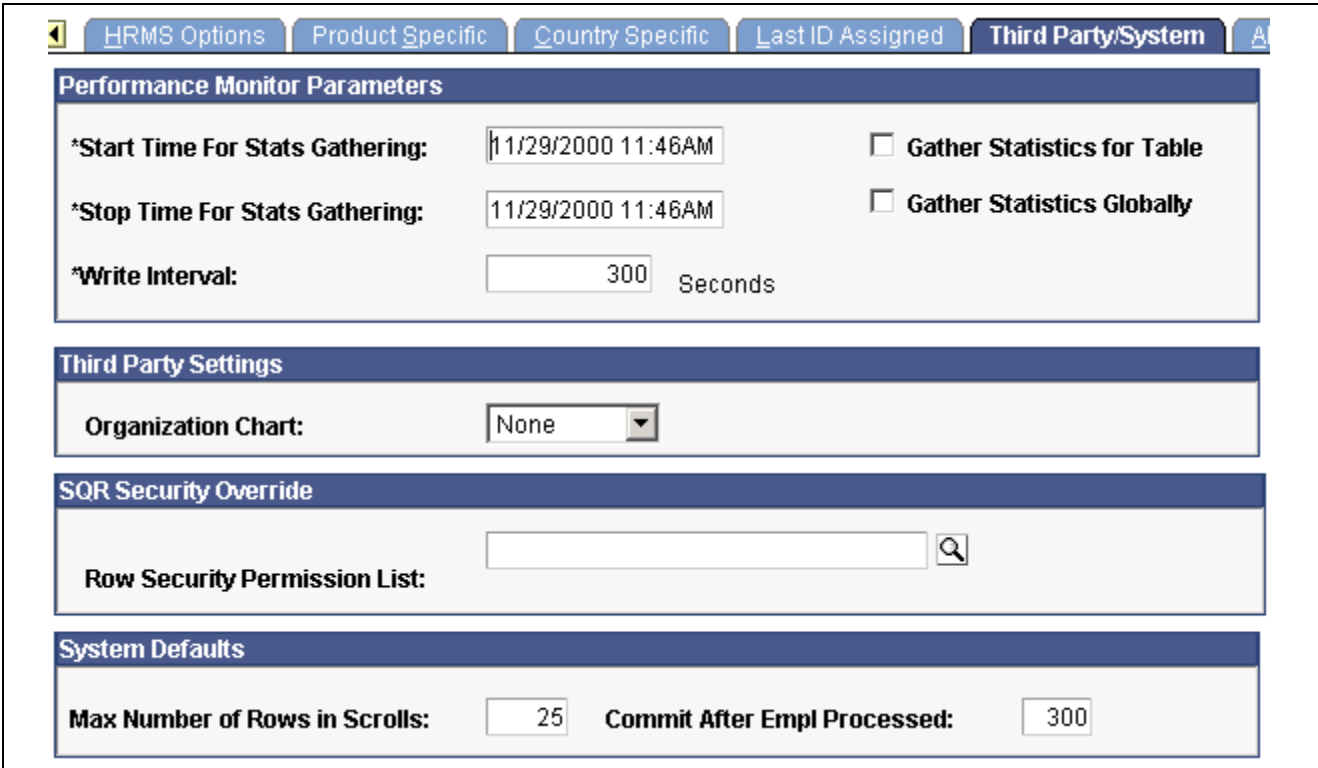
For more information about data conversion, ask your human resources project leader or see the PeopleSoft Application Designer documentation.

See Also

PeopleTools PeopleBook: Application Designer

Defining Parameters for Using Third-Party Applications

Access the Third Party/System page.



Performance Monitor Parameters

*Start Time For Stats Gathering: 11/29/2000 11:46AM ☐ Gather Statistics for Table

*Stop Time For Stats Gathering: 11/29/2000 11:46AM ☐ Gather Statistics Globally

*Write Interval: 300 Seconds

Third Party Settings

Organization Chart: None

SQR Security Override

Row Security Permission List: 

System Defaults

Max Number of Rows in Scrolls: 25 Commit After Empl Processed: 300

Third Party/System page

Performance Monitor Parameters

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

Gather Statistics for Table Select to gather statistics locally.

Gather Statistics Globally Select to gather statistics globally.

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

Third Party Settings

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

SQR Security Override

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

SQR Security is based on the Fast View Table 2 so you must run the Security Administration process to populate the Fast View Table 2 and use SQR security.

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

See [Chapter 9, “Administering PeopleSoft Security ,” page 87.](#)

System Defaults

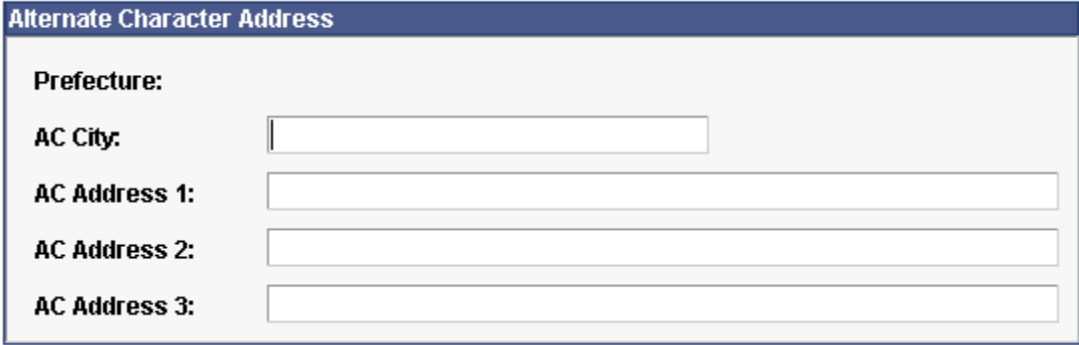
Max Number of Rows in Scrolls (maximum number of rows in scrolls)	Enter the maximum number of rows in a scroll-controlled data box for third-party systems.
Commit After Empl Processed (commit after employee processed)	Enter the maximum number of employees that a third-party system processes before committing.

See Also

PeopleTools PeopleBook: Data Management, “PeopleTools Utilities,” Performance Monitoring
[Chapter 24, “Building Organization Charts ,” page 439](#)

Entering Alternate Character Types

Access the Alternate Character page.



Alternate Character page

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

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

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

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

See Also

[Chapter 5, “Working With Languages,” Working With Double-Byte Characters, page 41](#)

Setting Up HRMS Options on the PeopleTools Options Page

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

- Multiple jobs functionality.
- Multicompany organizations.
- Organizations that conduct business using more than one currency.

Access the PeopleTools Options page on the PeopleTools, Utilities, Administration menu.

See *PeopleTools: Data Management*, *PeopleTools Utilities*, *PeopleTools Options*

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

Multi-Jobs Allowed

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

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

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

Multi-Company Organization

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

Multi-Currency

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

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

See Also

PeopleSoft 8.8 Pension Administration PeopleBook, “Establishing Pension Payees”

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information”

PeopleTools PeopleBook: Security

Administering Country Codes

This section discusses how to:

- View and update country information.
- Specify the address format for a country.
- Specify the county, state, and city for a country.
- Add the state, province, or equivalent entity for a country.
- Run a report of the Country code table.

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

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

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

See Also

Chapter 3, “Understanding PeopleSoft HRMS System Data Regulation,” page 9

Understanding Enterprise Integration Points

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

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

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

See Also

PeopleSoft Enterprise Integration PeopleBook

Pages Used to Administer Country Codes

Page Name	Object Name	Navigation	Usage
Country Description	COUNTRY_DEFN	Set Up HRMS, Install, Country Table	View or update country information.
Address Format	ADDR_FORMAT_TABLE	Set Up HRMS, Install, Country Table	Specify the address format for the country that is selected from the Country Table.
Valid Address	EO_ADDR_VALIDAT	Set Up HRMS, Install, Country Table	Specify the county, state, and city for the country that is selected from the Country Table.
State or Province Table	STATE_DEFN	Set Up HRMS, Install, State/Province	Add a state, province or equivalent entity for the country that is selected from the Country Table.
Country Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Install, Country Table Report	Run the Country Table report (PER708) that prints a list all country character codes.

Viewing or Updating Country Information

Access the Country Description page.

Country Description page

2-Char Country Code
(Two-character country code)

Enter the code that the U.S. government assigned to the country, if applicable.

EU Member State
(European Union member state)

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

(CAN) Stats-Can Location Code (Statistics Canada location code)

Displays the Statistics Canada Country location code, which is used on the FRA INSEE Table page and Canada Academic Teaching Survey reports. PeopleSoft delivers this table with the Stats-Can location code entered. PeopleSoft does not maintain this information.

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

See [Chapter 16, “Setting Up Local Country Functionality,”](#)
[Maintaining INSEE Codes](#), page 280.

See *PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events*, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process”.

Country Code for 1042

Enter the country code for nonresident alien processing.

(FRA) France

INSEE Country Number
(National Institute for
Statistical and Economic
Studies country number)

INSEE is an official statistics and economics organization in France. This organization issues a number that is used by the tax authorities, Social Security, the Chamber of Commerce, and others to identify an enterprise and its entities.

(AUS) Australia

Australian Public Service

Enter the Australian Public Service four digit country code here.

(BEL) Belgium

NIS Country Number
(National Institute for
Statistics country number)

Enter the NIS Country Number for reporting hires and terminations to the Social Insurance.

Specifying the Address Format for a Country

Access the Address Format page.

Country Description

Address Format

Valid Address

Country: AUT Austria

*Address Edit Page: EO_ADDR_DFT_SEC 

☐ Enable Address Search

☐ Enable Address Validation

Address Fields									
	Field Name	Edit Label Override	Include in Display?	Include in Print?	Line Number	Position Number	Use Description?	Pre Separator	Post Separator
1	COUNTRY		☐	☐			☐		
2	ADDRESS1		☒	☒	1	1	☐		
3	ADDRESS2		☒	☒	2	1	☐		
4	ADDRESS3		☒	☒	3	1	☐		
5	ADDRESS4		☒	☒	4	1	☐		
6	CITY		☒	☒	5	1	☐		
7	STATE		☒	☒	5	2	☒		
8	POSTAL		☒	☒	5	3	☐		
9	COUNTY		☒	☒	6	1	☐		

Address Format page

- Address Edit Page** Select an address page from the list of available options. The system will display the list of fields on that page in the Address Fields group box.
- Enable Address Search** Select to enable the address search.
- Enable Address Validation** Select to enable the system to validate address entries for state or province and city as shown on the Valid Address page.

Address Fields

- Field Name** The Field Name column displays the address fields available in the PeopleSoft HRMS.
- Edit Label Override** Enter a different label to override the displayed Field Name, if required for this country.
- Include in Display?** Select to have the system display this field whenever an address in this country needs to be entered in the system.
- Include in Print?** Select to have the system print this field whenever an address in this country will be printed.
- Line Number** Enter the line on the page on which this field should appear.
- Position Number** Indicate this field's position in the selected line.
- Use Description?** Select to have the system display a full description for this field.

Pre Separator and Post Separator

Enter separator characters for the address elements if applicable (for example and em dash).

Specifying the County, State, and City for a Country

Access the Valid Address page.

Country Description

Address Format

Valid Address

Country:

AUT

Austria

Valid addresses

Customize | Find | View All |

First 1-2 of 2 Last

1		
2		

Valid Address page

Valid Addresses

The Valid Address page stores state/province codes with corresponding cities, as entered on the State or Province Table page. When you select *Enable Address Validation* on the Address Format page, the system checks address entries against the values stored on the Valid Address page to verify that the city and state or province match.

See Also

[Chapter 16, “Setting Up Local Country Functionality,” \(ITA\) Setting Up Italian City Codes , page 283](#)

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

Access the State or Province Table page.

State or Province Table

Country:

BEL

Belgium

Postal Abbreviation:

LX

Numeric Code:

*Province:

State or Province Table page

PeopleSoft delivers the State or Province Table with all states, provinces, and equivalent geographical entities (such as Dutch communities and French departments) for all supported countries. The codes are based on standard postal codes. PeopleSoft updates this table with each release.

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

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

Setting Up Regulatory Regions

This section discusses how to set up regulatory regions.

Page Used to Set Up Regulatory Regions

Page Name	Object Name	Navigation	Usage
Regulatory Region	REG_REGION	Set Up HRMS, Install, Regulatory Region	Set up a regulatory region.

Understanding Enterprise Integration Points

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

See Also

PeopleSoft Enterprise Integration PeopleBook

Defining Regulatory Regions

Access the Regulatory Region page.

Regulatory Region	
Regulatory Region:	CANON
*Description:	Canada - Ontario
Country:	CAN  Canada
Security Access:	Available to All 
Default Record Group SetIDs	
SetID:	CANON Canada - Ontario
	OR
Clone from Existing Regulatory Region	

Regulatory Region page

Country

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

See [Chapter 10, "Installing PeopleSoft HRMS," Administering Country Codes](#), page 134.

Security Access

Select a security access level from the list. Because many companies have operators working with only one, limited set of regulatory regions, this feature enables you to hide the other regulatory regions from the operator. The values are stored on the Translate table. The Regulatory Region prompt edit views use these values to limit the user's Regulatory Region choices to the regions to which the user has access. Values are as follows:

- *Available To All:* Operators can select this region.
- *Not Available To Anyone:* No operators can select this region.
- *With Global Security Only:* Only operators who have that region's country established in their Security Detail list of Data Security (Administer HR System, Use, Maintain Global Security) can select that region.

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

Default Record Group SetIDs

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

SetID

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

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

Clone from Existing Regulatory Region

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

Enter the regulatory region that you want to clone.

See Also

[Chapter 9, "Administering PeopleSoft Security," page 87](#)

[Chapter 3, "Understanding PeopleSoft HRMS System Data Regulation," Business Units and TableSet Sharing , page 24](#)

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities"

Establishing Regulatory Transaction Types

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

Regulatory Transaction	Countries or Regions Included	Reason
<i>STANDARD</i>	All countries that are supported in the system.	Most modules apply regulatory and legislative edits at the country level.
HANDS (Health and Safety)	All countries that are included in the system, plus the Canadian provinces.	Most modules apply regulatory and legislative edits at the country level, but Canada has specific provincial laws governing their Health and Safety reporting.

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

Pages Used to Update or Add Regulatory Transactions

Page Name	Object Name	Navigation	Usage
Regional Transactions - Transaction	REG_TRX	Set Up HRMS, Install, Regional Transactions	Update the regulatory transaction description or add a new regulatory transaction.
Regional Transactions - Regions in Transaction	REG_TRX_REGION	Set Up HRMS, Install, Regional Transactions	Define the regulatory regions that make up a regulatory transaction type.

Adding Regulatory Regions to a Transaction

Access the Regions in Transaction page.

Transaction
Regions in Transaction

Regulatory Transaction: STANDARD

Regulatory Region	Country	Security Access	Description		
AUS	AUS	ALL	Australia	+	-
BEL	BEL	ALL	Belgium	+	-
BRA	BRA	ALL	Brazil	+	-
CAN	CAN	ALL	Canada	+	-
CHE	CHE	ALL	Switzerland Regulatory Region	+	-
DEU	DEU	ALL	Germany	+	-
ESP	ESP	ALL	Spain Regulatory Region	+	-
FRA	FRA	ALL	France	+	-

Regions in Transaction page

Regulatory Region Select the regulatory regions that belong to this transaction.

CHAPTER 11

Setting Up Organization Foundation Tables

This chapter discusses how to:

- Define Business Units
- Define legal types.
- Enter company information.
- (USF) Enter agency information.
- Establish locations.
- (USF) Establish federal locations.
- Define establishments.
- Maintain departments.
- (USF) Set up federal departments.
- Report on agencies, companies, departments, and locations.

Understanding Enterprise Integration Points

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

See Also

PeopleSoft Enterprise Integration PeopleBook

Adding, Updating, and Identifying Business Units

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

Pages Used to Update Business Units

Page Name	Object Name	Navigation	Usage
Business Unit	BUS_UNIT_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit	Add or update business units.
Business Unit Reference	BUS_UNIT_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Business Unit	Identify business units in other PeopleSoft applications that are related to a business unit.
Business Unit Options Default	BUS_UNIT_OPT_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit Options	Set system defaults such as Company, Country, and Currency for a specific SetID.
GL Business Unit	BUS_UNIT_TBL_GL	Set Up HRMS, Foundation Tables, Organization, GL Business Unit	Review GL business units.

Adding and Updating Business Units

Access the Business Unit page.

Business Unit Business Unit Reference

Business Unit: CFMBU

***Status:** Active

***Description:** Canadian Business Unit

Short Description: Cdn BU

Default Record Group SetIDs

SetID:	CDN	Canadian General SetID

OR

Clone from Existing Business Unit

Business Unit page

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

Status

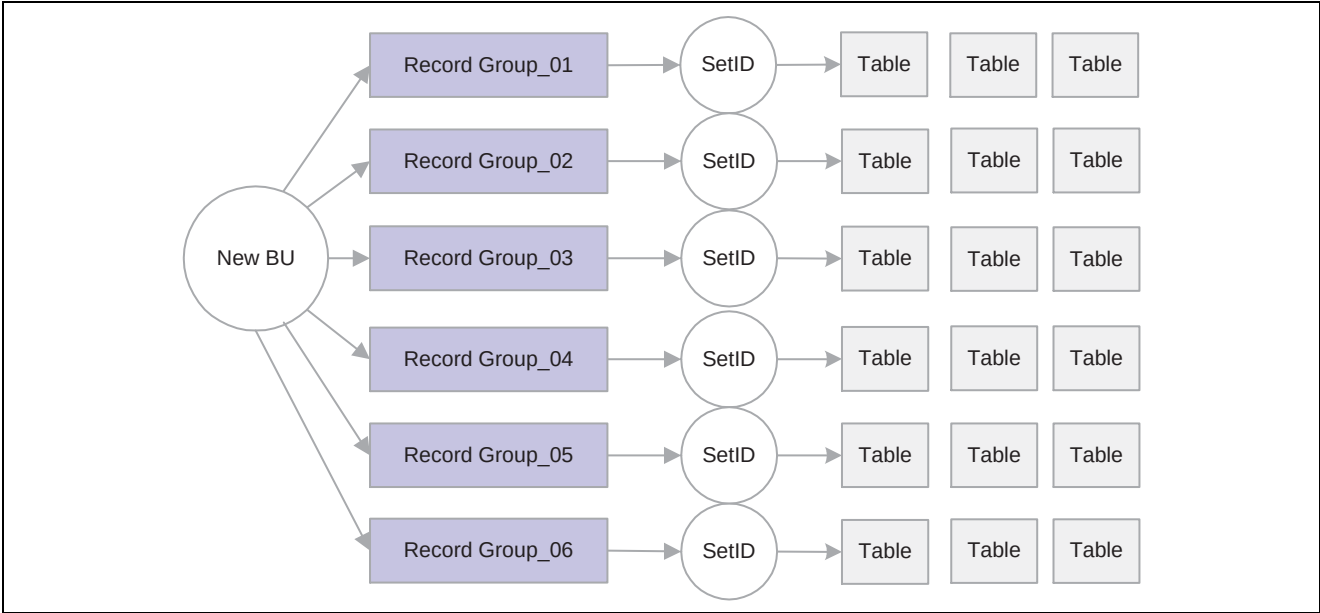
Select *Active* or *Inactive*. If you select *Inactive*, the business unit won't appear in any business unit lists in PeopleSoft HRMS.

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

Understanding Your TableSet Sharing Options

Default Record Group SetIDs

When you define a new business unit on the Business Unit table, you can specify that the system establish default record group SetIDs for the new business unit, using the options in this group box. The SetID or Clone from Existing Business Unit value that you enter determines your preliminary TableSet sharing setup for the new business unit by determining the SetIDs that are assigned to each record group for the new business unit. The SetID assigned to a record group determines which TableSet is used as valid values for that business unit.



TableSet Sharing

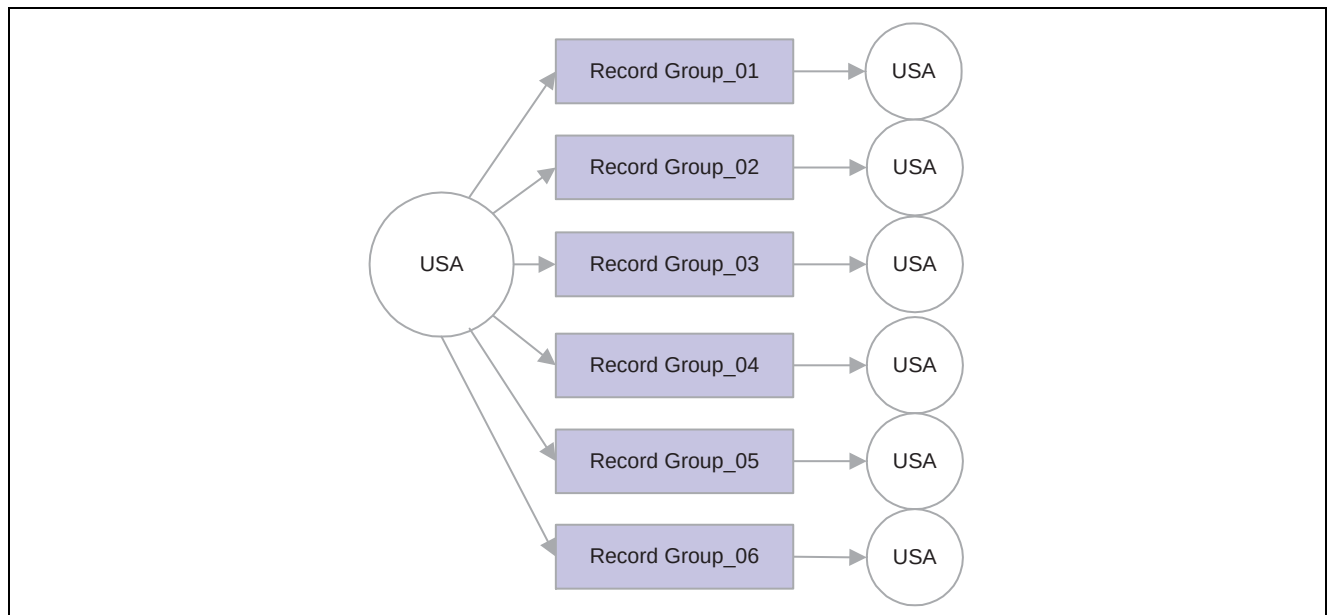
Establishing a TableSet Sharing Setup Using One Default SetID

If you want to define a TableSet sharing setup for the new business unit you are creating, using a primary default SetID that you can modify as necessary on the TableSet Record Group Control page, enter the default SetID that you want to use.

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

Note. You can associate only one default SetID with a business unit.

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



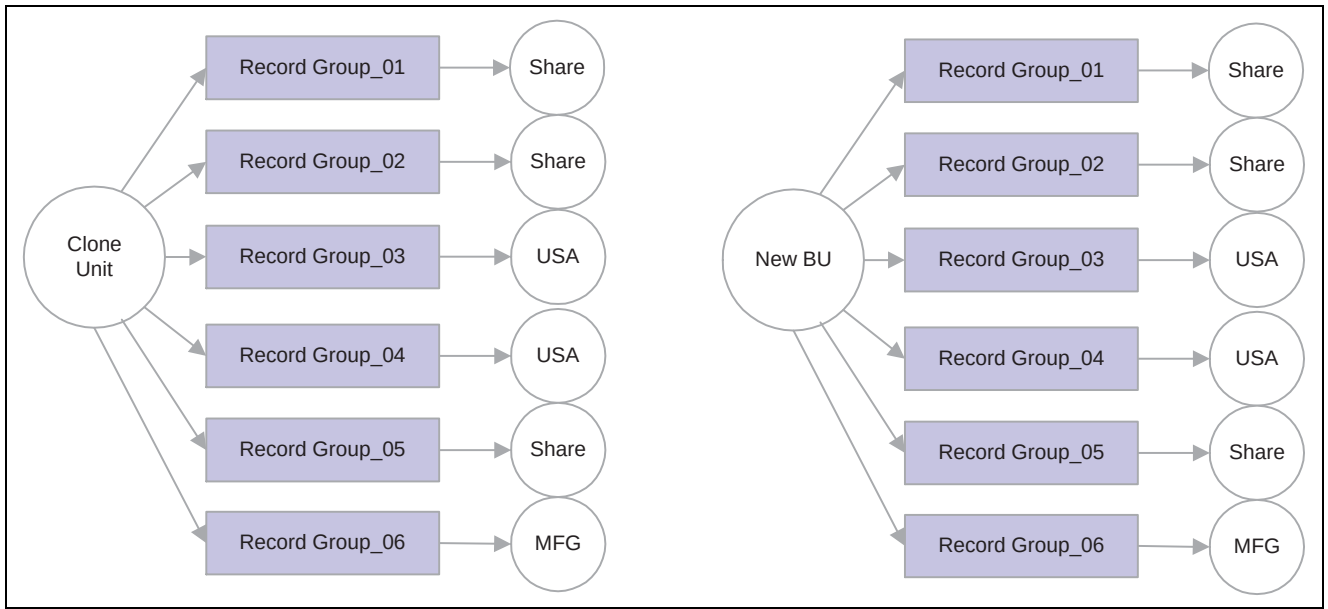
TableSet sharing using default setID.

Cloning TableSet Setup From Existing Business Units

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

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

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



Cloning the tableset sharing setup from an existing business unit

Whichever method you select, when you save the new business unit for the first time, the system makes the default SetID or Clone Unit unavailable for entry. You can't change the default record group SetID information for this business unit again. This rule prevents you from accidentally overwriting the TableSet record group controls for your defined business units in PeopleSoft HRMS.

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

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

See Also

PeopleTools PeopleBook: Data Management, PeopleTools Utilities, TableSet Control - Record Group

Identifying Business Units in Other Applications

Access the Business Unit Reference page.

Business Unit

Business Unit Reference

Business Unit:

CFMBU

Canadian Business Unit

Business Unit Cross Reference

Asset Management Business Unit:		AR Business Unit:	
Order Management Business Unit:		AP Business Unit:	
Balancing Business Unit:		PO Business Unit:	
Budgeting Business Unit:		PC Business Unit:	
Billing Business Unit:		General Ledger Unit:	CM02
Inventory Business Unit:			

Business Unit Reference page

Business Unit Cross Reference

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

Note. You can review which PeopleSoft General Ledger units are associated with the PeopleSoft HRMS business units on the Business Units Links Details. The HRMS Commitment Accounting business process uses business unit mapping information when processing actuals and encumbrances transactions.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Commitment Accounting, “Setting Up GL Interface Tables,” Mapping Business Units

Setting Business Unit Defaults

Access the Business Unit Options Default page.

Business Unit Options Default			
SetID:	C	Contract Employee	
*Company:		Q	
*Country:		Q	
*To Currency:		Q	
Standard Hours			
*Default Standard Hours:	40.00	Minimum Standard Hours:	0.00
Work Period:	W	Q	Weekly
		Maximum Standard Hours:	0.00
 Belgium			
Industrial Committee:		NACE Code:	
 Canada			
*Census Metropolitan Area:	ON		
*Industrial Sector:	Air Transp		

Business Unit Options Default page

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

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

Company, Country, and To Currency

Select the Company, Country, and To Currency that the system will use as a default value.

Standard Hours

Default Standard Hours

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

Work Period

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

Minimum Standard Hours and Maximum Standard Hours

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

(BEL) Belgium

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

(CAN) Canada

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

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

Entering Company Information

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

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

PeopleSoft Pension Administration tracks pension payees through retiree jobs that are separate from and concurrent with employees' active employment jobs. These retiree jobs must be associated with specific retiree companies. Therefore, be sure to set up companies to house your payees. Because pension plans are distinct tax reporting entities with their own U.S. Employer Identification Numbers (EINs), you typically set up one retiree company for each pension plan that you sponsor. Once you set up your retiree companies, you can match companies to pension plans in the Plan Administration component.

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

This remainder of this section discusses how to:

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

Special Considerations for U.S. Companies

For U.S. companies, if you're using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a company is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes. Because pension plans have EINs, you create companies for each pension plan. You reference a pension plan company from the payee job record of anyone collecting benefits from that plan.

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

See Also

PeopleSoft 8.8 Pension Administration PeopleBook, “Establishing Plan Administration Information,”
Entering Funding Provider and Company Information

PeopleSoft 8.8 Global Payroll PeopleBook, “Defining the Organizational Structure,” Defining Pay Entities

PeopleSoft Payroll for North America PeopleBook

PeopleSoft Payroll Interface PeopleBook

Pages Used to Enter Company Information

Page Name	Object Name	Navigation	Usage
Company Location	COMPANY_TABLE1	Set Up HRMS, Foundation Tables, Organization, Company	Define and describe companies.
Default Settings	COMPANY_TABLE2_GBL	Set Up HRMS, Foundation Tables, Organization, Company	Set up default company information; for example, the company pay group, salary point values, and Claeys formula factors for Belgian companies.
(BEL) Claeys	COMP_TBL2ABEL_SBP	Click the Claeys link on the Default Settings page.	Enter the default information and salary factors that are used to perform Claeys formula calculations.
(BEL) Providers	COMP_TBL2BBEL_SBP	Click the Providers link on the Default Settings page.	Associate a provider with a setID.
(USA) Tips Processing	COMP_TBL6USA_SEC	Click the Tips Processing link on the Default Settings page.	Set up tip allocation.
(USA) (CAN) Liability/Expense Account	COMP_TBL7USA_SEC	Select the Liability/Expense Account Codes link on the Default Setting page.	Use the Liability/Expense Acct Codes page to enter General Ledger Account Codes for Net Pay and Direct Deposits.
(USA) FICA/Tax Details	COMP_TBL8USA_SEC	Select the FICA/Tax Details link on the Default Settings page.	Use the FICA/Tax Details page to specify your federal employer identification number, link companies together, and define default tax status.
Phones	COMPANY_TABLE3_GBL	Set Up HRMS, Foundation Tables, Organization, Company	Enter telephone information for a company.
Rules Definition	COMPANY_TABLE4_GBL	Set Up HRMS, Foundation Tables, Organization, Company	Define FTE rules for the company.
Company Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Company Table Report	Run the Company Table report (PER707). This report prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table.

Defining Companies

Access the Company Location page.

Company Location		Default Settings	Phones	Rules Definition
Company:		KD1		
Location		Find View All First 1 of 1 Last		
*Effective Date:	01/01/1980	*Status:	Active	
*Description:	Continental Commerce - Germany			
Short Descr:	CC-Germany			
Location SetID:	DEU01	Setid for DEU01 BU		
Location:	KD912	Zweigstelle München		
*Default SetID:	DEU	Germany Table Sets		
Legal Entity:				
Country:	DEU	Germany		
Address:	Muenchner Strasse 14 85774 Munich Bayern			
	Edit Address			

Company Location Table page, 1 of 2

Belgium

Mailing Address

Country: United States

Address:

[Edit Address](#)

Email Addresses [Customize](#) | [Find](#) | [View All](#) | [First](#) [1 of 1](#) [Last](#)

	*Address Type	*Email Address		
1			+	-

Japan

Representative Information [Find](#) | [View All](#) | [First](#) [1 of 1](#) [Last](#)

*Effective Date:

Representative Title:

Representative Name:

Company Location Table page, 2 of 2

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

Works Council ID Select a Works Council ID.

(BEL) Belgium

Enter the address information for your Belgian companies.

(JPN) Japan

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

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

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

See Also

Chapter 3, “Understanding PeopleSoft HRMS System Data Regulation,” Understanding the Relationship Between SetIDs and TableSets, page 16

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information,” (JPN) Appointment Reporting for Job Data Changes

Setting Default Information for Companies

Access the Default Settings page.

Company Location		Default Settings		Phones		Rules Definition	
Company:		KD1					
Default Settings Find View All First 1 of							
Effective Date:	01/01/1980		Status:	Active			
Description:	Continental Commerce - Germany						
Pay Group:	KD1		German Monthly				
Default Earnings Program:	GS		General Schedule				
Points Value:							
Currency Code:	DEM						
*Lines on Paysheet:	15	Terminated Employees - Payroll Activity Days:			30		
Regulatory Region:							

Default Settings page (1 of 6)

 Belgium

Company Information

Company Trade Name:

Registration for Trade:

Legal Entity: ☐ Salary Limit

Official Language:

[Claeys Defaults](#)
[External Providers](#)

Employer Data

Natl Office for Social Sec:

RIZIV #:

Geo Loc NOSS:

Industrial Committee: 

Overseas Soc Ins Inst:

Federal Pension Institute:

Statistics Institute:

NACE Code:

 Canada

WCB Firm Number:

WCB Rate Number:

☒ Single Chk for Multiple Jobs ☒ Pay Taxes through AP

 Switzerland

AHV Number:

Accident Insurance Number:

Trade Registry Number:

Default Settings page (2 of 6)

Germany

☐ OECD Permission Required

☒ Medical Checkup Required

Accident Insurance: GB Professional Association for Horticulture

Social Insurance Accident #:

Tax Unit:

Spain

Fiscal Identification Code:

France

SIREN Code:

APE Code:

Base Scheme:

Option:

Bank ID:

BankData:

Check Digit:

Pension/Contingency Funds

Customize | Find | View All | First 1 of 1 Last

	*Pension Code	*Institution #	Description	*Co. Memb. #	Population Ctg.	
1						

Default Settings page (3 of 6)

United Kingdom

Business Description:

Italy

Representative Type

Customize | Find | View All | First 1 of 1 Last

	*Representative Type	EmplID	Description	
1				

List of Company Code

Customize | Find | View All | First 1 of 1 Last

	Company Code Type	Company Code	Main Code	
1				

Netherlands

Federal Employer Tax ID:

Providers

Customize | Find | View All | First 1 of 1 Last

	SetID	Vendor ID	Registration No.	
1				

Default Settings page (4 of 6)

 **USA**

Federal Tax Deduction Priority:

State Tax Deductn Priority:

EEO Company Code:

☒ **Single Chk for Multiple Jobs**

☒ **Pay Taxes through AP**

[Tips Processing](#)

[Liability/Expense Acct Codes](#)

[FICA/Tax Details](#)

 **Australia**

Salary Packaging

Liable for Payroll Tax ☐

TEC Comp Rate Code: 

TPV Comp Rate Code: 

Higher Education

Institute Code:

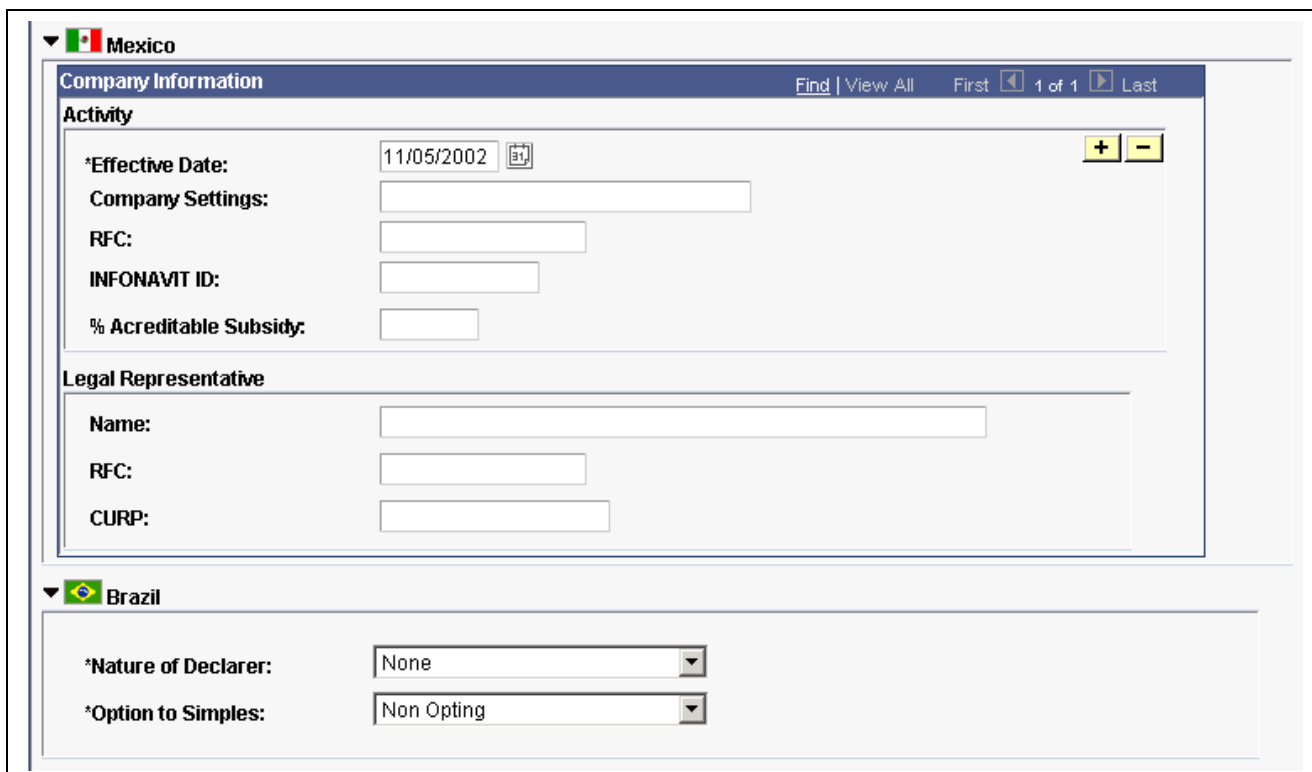
Australian Public Service

Agency Code:

 **New Zealand**

Classification Unit: 

Default Settings page (5 of 6)



Mexico

Company Information Find | View All First 1 of 1 Last

Activity

*Effective Date: 11/05/2002 [E] + -

Company Settings: []

RFC: []

INFONAVIT ID: []

% Accreditable Subsidy: []

Legal Representative

Name: []

RFC: []

CURP: []

Brazil

*Nature of Declarer: None [v]

*Option to Simples: Non Opting [v]

Default Settings page (6 of 6)

Defaults

Pay Group

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

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

Points Value

Enter the monetary value of your points.

Lines on Paysheet

Enter the number of lines for the paysheet. Paysheets serve as a repository for the data that is required to calculate the employee pay for each pay period.

Terminated Employees Payroll Activity Days

The system issues a warning if a terminated employee has payroll activity after the number of days that you specify.

(BEL) Belgium

Company Trade Name

Enter the name of your Belgian company; for example, Continental Commerce - Belgium.

Registration for Trade

Enter the company's official registration number from the Belgian Trade Register.

Legal Entity	A legal entity is the legal form that applies to a company: <i>Inc</i> (corporation), <i>Coop</i> (cooperative), and so forth. The translate values reference different forms that you can select to indicate whether the company is public or privately held or whether it is of limited liability.
Salary Limit	Select to set a maximum salary limit. While selecting this check box doesn't enforce any salary limits in the system, you can use it as a reference to prevent salary raises that exceed company limits or that would occur during periods where increases aren't allowed. If your organization enforces periods where no salary increases are allowed or limits employee salary increases, you can modify the PeopleCode behind this page. Then, when you select this check box, the system it to ensure that no raises are allowed during these periods.
Official Language	Select the company official language. This value is used as the default employee official language, with the exception of companies located in the Brussels-Capital Region, for which the employee preferred language is used as the default.
Claeys Defaults	Click to enter Claeys default and salary factor information on the Claeys page. See Chapter 11, "Setting Up Organization Foundation Tables ," (BEL) Entering Default Information and Salary Factors , page 166.
External Providers	Click to enter Belgian provider information for tracking third-party providers on the Providers page. See Chapter 11, "Setting Up Organization Foundation Tables ," (BEL) Associating a Provider With a SetID , page 167.
National Office for Social Sec (national office for social security)	Enter the number under which the company is registered at the National Office for Social Security.
Overseas Soc Ins Inst (overseas social insurance institution, federal pension institute)	Enter the company's overseas social insurance institution, federal pension institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.
RIZIV # (RIZIV number)	Enter the RIZIV code. It records the company's Federal Institute for Illness and Disability Insurance category.
Geo Loc NOSS (geographic location for State Social Insurance category)	Enter the geographical location for the NOSS.
Statistics Institute	Enter the statistics institute for use in meeting your Belgian organization's reporting requirements to the Belgian government. While the system doesn't require this information, it is important for regulatory reporting.
Industrial Committee	Select the appropriate industrial committee for the company. You can override this value at the department level.

NACE Code

Enter the NACE code for the company.

Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada

WCB Firm Number
(Workers' Compensation
Board firm number) and
WCB Rate Number

Enter if you are tracking WCB data for Canadian employees.

Pay Taxes through AP (pay
taxes through Accounts
Payable)

Select to indicate if this company is tracking its taxes through Accounts Payable.

**Liability/Expense Acct
Codes**

Click this link to enter information about general ledger liability and expense account codes.

See [Chapter 11, "Setting Up Organization Foundation Tables," \(CAN\) \(USA\) Entering Liability and Expense Account Codes , page 169.](#)

(CHE) Switzerland

AHV Number (Alters-und
Hinterbliebenen
Versicherung number)

Enter the number of the responsible AHV compensation office. This numeric code can be up to 6 characters.

**Accident Insurance
Number**

Enter the number assigned to the company by its accident insurance company. Use this number in health and safety reporting.

Trade Registry Number

Enter the number assigned to the company by the Trade Registry office. The format is 999.9.999.999-9.

(DEU) Germany

**Works Council Admin
Required** (Works Council
administration required)

Select if Works Council administration is required for this German company. Depending on whether this check box is selected, the Works Council is involved in different action/action reason transactions that occur on the Job record.

**OECD Permission
Required** (Organization for
Economic Cooperation and
Development permission
required)

Select if applicable. Germany requires OECD permission for workers from non-OECD countries to work in certain types of industry, such as defense or high technology.

Medical Checkup Required

Select if a medical checkup is required for your workers under German labor law.

(ESP) Spain

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

(FRA) France

SIREN Code (Système Informatique pour le Répertoire des Entreprises code) Enter a SIREN code for this organization. This code is assigned to a company when it registers as a business with the French government. The code isn't required for your human resources system, but is required on many company documents.

APE Code (Activité Principale Exercée code) Select an APE code. This code serves as a classification of the type of industry that the company is involved in (banking, software, insurance, and so forth). The code is required by French law and must appear on all company regulatory reports.

BankData Check Digit Enter a bank data check digit (optional).

Pension Code Select the code for the pension companies used by this French company.

Institution # (institution number) Select the institution number for the pension companies used by this French company.

Co. Memb. # (company membership number) Enter the membership number that was assigned to this company when it registered with the pension company.

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

(GBR) UK

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

(ITA) Italy

Company Code Enter the company code that is assigned to your company by the Italian regulatory authorities.

Main Code Select if this is the main company code that is used for reporting purposes.

(NLD) Netherlands

Federal Employer Tax ID Enter the tax ID number that is provided by the Dutch government.

Vendor ID Select from the list of insurance providers.

Registration No. (registration number) Enter the registration number for the insurance provider, which you obtain from the provider.

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

(USA) USA

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

(AUS) Australia

Liable for Payroll tax	Specify whether tax is applicable to the default compensation rate components. When you select this check box, the state payroll tax rates you set up on the State Payroll Tax page are used in the package compensation calculation for your salary-packaged employees.
TEC Comp Rate Code and TPV Comp Rate Code	Specify the default compensation rate code for TPV (Total Package Value) and TEC (Total Employment Cost) that you will use in salary packaging enrollment. You set up your compensation rate codes on the Comp Rate Code Table page.
Institute Code	This group box appears only if you've selected the Education & Government check box on the Country Specific page of the Installation component. Enter the Institute Code identifier for DETYA reporting. This is used by the system to track information about the institute for reporting purposes and defaults on any page where this is required information.
Agency Code	This group box appears only if you've selected the Education & Government check box on the Country Specific page of the Installation component. Enter the agency code for the company.

(NZL) New Zealand

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

(MEX) Mexico*Company Information*

Company Settings	Define the company's activity. Typical values are <i>Financial, Pharmaceutical, Manufacturing, Services, Tourism, and Sales</i> .
RFC	Enter the RFC ID for your company. The Mexican Treasury (<i>Secretaria de Hacienda y Credito Publico</i>) identifies each company with an RFC ID. Social security, taxes, and payroll reports use the RFC ID.
INFONAVIT ID	Enter the INFONAVIT ID for your company.
% Accreditable Subsidy	Enter the percentage of creditable subsidy. This value is used to calculate federal taxes.
Name	Enter the name of the person who acts as the legal representative for the company.
RFC and CURP	Enter these values for the legal representative.

(BRA) Brazil

Nature of Declarer	Enter the legal nature of the establishment. This information is used for reporting purposes.
Option to Simples	Select an option to simples value to have the company's contributions replaced by the actual invoice contribution amounts after invoices are generated.

See Also

Chapter 13, "Setting Up Jobs," Maintaining Pay Groups, page 245

PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations, "Requesting Works Councils Approval"

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

PeopleSoft 8.8 Human Resources PeopleBook: Administer Salary Packaging, "Setting Up Salary Packaging," Setting Up Salary Packaging Company Payroll Tax Options

PeopleSoft 8.8 Human Resources PeopleBook: Administer Compensation, "Setting Up Administer Compensation," Setting Up Rate Codes

PeopleSoft Payroll for North America PeopleBook

PeopleSoft Global Payroll PeopleBook

(BEL) Entering Default Information and Salary Factors

Access the Claeys page.

Claeys Defaults			
Factor Seniority:		Factor Yearly Base:	
Factor Age:		Number of Months to Reduce:	
Correct Factor:		Claeys Salary Limit:	

Salary Factors			
Hour/Year Factor:		Month/Year factor:	
Week/Year Factor:		Year/Year Factor:	

Claeys page

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

Note. In Belgium, the year factor is 13.85.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “(BEL) Entering Additional Data for Belgian Workers”

(BEL) Associating a Provider With a SetID

Access the Providers page.

Providers							Customize	Find	View All	First	1 of 1	Last
	SetID	Vendor ID	Name 1	Affiliate	Registration No.							
1												

Providers page

SetID and Vendor ID	Select from the list of options. The system lists all valid providers, not just Belgian providers.
Affiliate	Enter the affiliate, if applicable.
Registration No. (registration number)	Enter the registration number, if applicable.

See Also

Chapter 19, “Setting Up Vendors,” page 371

(USA) Setting Up Tip Allocation

Access the Tips Processing page.

Company Table Sec Page

☐ **Tips Processing**

Tips Allocation Controls	
*Tip Establishment Field:	Job Location
Minimum Tips Percent:	8.00000
*Tips Allocation Method:	Gross Receipts
Tips Allocation Earnings Code:	

Tips Payroll Controls	
☐ Delay Withholding of Taxes	☒ Adjust to Minimum Wage
Min Wage Adjustment Earnings Code:	
Tip Credit Earnings Code:	

Tips Process page

Tips Processing

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

Tip Establishment Field

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

Minimum Tips Percent

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

Tips Allocation Method

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

Tips Allocation Earnings Code

Select the earnings code to record the amount calculated by the tip allocation process.

Delay Withholding of Taxes

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

- Min Wage Adjustment Earns Code** (minimum wage adjustment earnings code) Select the earnings code to be used when tips plus wages do not meet statutory minimum wage requirements.
- Tip Credit Earnings Code** Select an earnings code for recording tip credits. Tip credits are memo earnings to identify what portion of reported tips goes toward payment of the federal minimum wage (state minimum wage is used if it is higher than the federal minimum wage).

(CAN) (USA) Entering Liability and Expense Account Codes

Access the Liability/Expense Acct Codes page from the Company Table – Default Settings page.

GL-Net Pay		GL-Dir Dep	
01/01/1980			
GL Liability Acct Codes (US)		GL Expense Acct Codes (US)	
(Non Comm. Acctg.)		(Non Comm. Acctg.)	
GL-FWT		FICA OASDI	
EIC Advances		FICA MediCare	
GL-OASDI (Employee)		GL-FUT Exp	
FICA MediCare (Employee)		GL-SUT Exp	
FICA OASDI (Employer)		GL-VDI-EXP:	
FICA MediCare (Employer)		GL-SDI Exp	
GL-FUT		GL-Lcl Exp	

Liability/Expense Acct Codes page

The Net Pay and Direct Deposits fields on this page are applicable to both U.S. and Canada. The liability and expense account codes are related to U.S. tax accounting information only. Canadian companies use the Wage Loss Plan Table to enter GL tax accounting information.

See [Chapter 18, “Setting Up Payroll Tax Tables,” Defining Canadian Wage Loss Plans](#), page 365.

(USA) Entering FICA and Tax Information

Access the FICA/Tax Details page from the Company Table - Default Settings page.

Fed EIN: Fed Res Bank ID: Fed Res Bank Dist:	Balance Processing Common Paymaster ID: Other Common ID:
Special Projects	
FICA Status-Employer ☒ Subject ☐ Exempt ☐ Medicare only ☐ FLSA Required	FICA Status-Employee ☒ Subject ☐ Exempt ☐ Medicare only
Employees' SDI Status ☒ Subject ☐ Exempt	
Tax Report Type ☒ W-2 or Territories ☐ W-2PR ☐ 1099R ☐ None ☐ Company Exempt from FUT ☐ Company Exempt from SUT	

FICA/Tax Details page

Federal EIN

Specify the unique Federal EIN associated with the company. This control becomes the default for the Employer ID State Withholding control on the Company State Tax Table.

Note. If you choose to set up multiple companies with the same EIN, modifications must be made to the quarterly wage reports to 'rollup' these totals (i.e. TAX810XX, TAX860XX, TAX002XX, etc.)

However, for Annual W-2 reporting, employee balances can be combined using the W-2 Reporting Company feature.

Fed Res Bank ID

The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank (FRB) identifier assigned to this company by the FRB

Fed Res Bank Dist

The system uses this field when processing U.S. savings bonds issuing data. Enter the Federal Reserve Bank District Designator indicating which FRB is doing the issuing of the bonds.

Balance Processing

Use the Balance Processing options when two or more related corporations concurrently employ one or more employees and pay them through one of the corporations as a common paymaster. By selecting these controls, the system treats simultaneous employee balances in multiple companies as one total balance when calculating payroll.

The total Social Security and Medicare taxes that must be paid are determined as if the employees had one employer—the common paymaster—paying all their wages. The system will also recognize balances in all companies linked by a common paymaster when determining if a certain limit has been met—so you don't have to calculate employee balances manually.

Common Paymaster ID	Enter a Common Paymaster ID to tell the system to treat <i>all employee tax, deduction, garnishment, and earnings balances</i> as one for companies sharing that Common Paymaster ID.
Other Common ID	Enter an Other Common ID to tell the system to treat <i>all employee deduction garnishment, and earnings balances</i> as one for companies sharing that Other Common ID. You'd typically use an Other Common ID when you need to keep your companies separate for tax purposes, but need to maintain accurate current employee balances across companies for calculating Section 415 limits, year-to-date deduction maximums, and maximum yearly earnings ceilings. Leave accrual balances are not included in Common Paymaster ID or Common Other ID processing.
FICA Status Employer	This field is information only.
FICA Status Employee	This information appears as a default on the Job Data, Job Information page.
Tax Report Type	This field is used by the year-end tax reporting programs to select the proper set of employees, either W-2 or 1099R recipients, for inclusion on one of several possible year-end tax reports. Note. To use PeopleSoft Payroll to produce Forms W2PR for Puerto Rico year-end reporting, you need to have paid Puerto Rico employees in one or more separate companies for the entire tax year being reported. Note. To include retirees in your year-end reports, you need to set them up in a separate 1099-R company.
FLSA Required	Select this option if <i>any</i> non-exempt employees in the company need to have the FLSA rate calculated for their overtime pay. If there are Pay Groups with non-exempt employees who do not need to have the FLSA rate calculated then the FLSA Required flag on the Pay Group should be deselected. Deselecting the FLSA Required on the Company Table prevents you from using the FLSA calculation for all Pay Groups because the FLSA Required flag on the Pay Group is hidden. If you select this option, also select the applicable FLSA rule to indicate how and when the FLSA calculated premium will apply to overtime pay.
Higher of FLSA/Contractual	FLSA premium will apply only when it is greater than the contractual rate.
Always use FLSA Premium	Use the FLSA premium amount regardless of the contractual rate.
Employees' SDI Status	For states where the SDI status is not specified as <i>Not Applicable</i> , the Employees' SDI Status will appear as a default.
Company Exempt from FUT	Select this option if the company is exempt from FUT.

Company Exempt from SUT Select this option if the company is exempt from SUT.

Entering Phone Information

Access the Phones page.

Company Location | Default Settings | **Phones** | Rules Definition

Company: KD1

Phones / Processing Controls

Effective Date: 01/01/1980 **Status:** Active

Description: Continental Commerce - Germany

Processing Controls

Industry: Core ☒ **Override Operator Industry**

Industry Sector: Core

▼ **France**

Labor Agreement: 🔍

Phone Information Customize | Find | View All | First 1-2 of 2 Last

	Phone Type	Telephone	Country Code		
1	Business	089 99123456	049	+	-
2	FAX	089 99123401	049	+	-

Company - Phones page

Processing Controls

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

(FRA) France

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

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

Phone Type and Telephone Enter the phone type, such as *Business*, *Home*, and so forth, and the phone number. The phone fields are effective-dated and scrollable so that you can enter multiple phone types and maintain history data.

Primary Phone Select to indicate that the phone number is the primary number.

Defining Company Rules

Access the Rules Definition page.

Company Location Default Settings Phones Rules Definition

Company: KD1

Decimal Precision for Full-Time Equivalency Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

FTE Decimal Precision: 2

France

PAID FTE Decimal Precision: 2

Rules Definition page

FTE Decimal Precision

Enter the number of decimal points the system will use when calculating FTE.

Note. If you set this field to zero or leave it blank, the FTE calculations on the Job Data pages will default to 1 regardless of the number of hours entered or part/full-time status.

(FRA) France

Paid FTE Decimal Precision

Enter the number of decimal points the system will use when calculating FTE for payment purposes.

(USF) Entering Agency Information

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

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

If you're using PeopleSoft Payroll for North America, an agency is typically defined as a business unit that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

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

You can print a report of your Agency table using the Agency Table report.

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

See Also

PeopleSoft Payroll for North America PeopleBook

Pages Used to Enter Agency Information

Page Name	Object Name	Navigation	Usage
Payroll Interface Information	GVT_COMPANY_TBL7	Set Up HRMS, Foundation Tables, Organization, Agency USF	Enter the agency's payroll interface information.
Payroll Office Address	GVT_COMPANY_TBL8	Set Up HRMS, Foundation Tables, Organization, Agency USF	Enter the agency's payroll office address information.
ECS Address (electronic certification system address)	GVT_COMPANY_TBL9	Set Up HRMS, Foundation Tables, Organization, Agency USF	Enter the agency's ECS address information.
Agency Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Agency Table Report USF	Run the Agency Table report (FGPER803). This prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date.

See Also

Appendix A, "PeopleSoft Application Fundamentals for HRMS Reports," Basic HRMS Reports, page 539

Entering Payroll Information

Access the Payroll Interface Information page.

Agency Location	Default Settings	Phones	Payroll Interface Information	Payroll Office Address	ECS Address

Company: AG

Payroll Office Contact/ID Information Find | View All First 1 of 1 Last

Description: Department of Agriculture

Effective Date: 01/01/1980 Active

Description:

Payroll Office Contact Info

Contact Person:

Contact Title:

Contact Type:

Contact Phone: ☐ FTS Indicator

Payroll Office ID Info

Agency ID:	FRB Company ID No:
Agency Check ID:	FRB Location ID No:
Agency TSP ID:	FRB Acct No:
Agency TSP Account:	FRB Branch No:
Voucher Year:	FRB Dist Desig:

Payroll Interface Information page

FIS Indicator

Select if the phone number is an FIS number.

FRB Company ID No.

If necessary, enter FRB information.

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

See Also*PeopleSoft Payroll for North America PeopleBook*

Defining Legal Types

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

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

See Chapter 11, “Setting Up Organization Foundation Tables,” Entering Company Information, page 152.

Page Used to Define Legal Types

Page Name	Object Name	Navigation	Usage
Legal Type	LEGAL_TYPE_TBL	Set Up HRMS, Foundation Table, Organization, Company Legal Type, Legal Type page	Define the types of legal entities that your organization includes.

Establishing Locations

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

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

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

The remainder of this section discusses how to:

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

Pages Used to Establish Locations

Page Name	Object Name	Navigation	Usage
Location Address	LOCATION_TABLE1	Set Up HRMS, Foundation Tables, Organization, Location Table	Enter physical locations in your organization, such as corporate headquarters, branch offices, and remote sales offices.
Business Units by Location	LOC_BU_SEC	Click the Business Units that use this SetID link on the Location Address page.	View a list of the business units that use this setID.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter phone numbers for the location addresses.
Location Profile	LOCATION_TBL2_GBL	Set Up HRMS, Foundation Tables, Organization, Location Table	Specify a salary administration plan for the location, as well as tax and local country information.
Location Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Location Table Report	Run the Location Table report (PER705). This report lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).

Entering Company Locations

Access the Location Address page.

The screenshot shows the 'Location Address' page with the following details:

- Tabs:** Location Address (active), Location Profile
- SetID:** SHARE
- Location Code:** KCQC00
- Link:** [Business Units that use this Setid](#)
- Form Fields:**
 - *Effective Date: 01/01/1980
 - *Description: Montreal Office
 - Building:
 - Floor #:
 - *Status: Active
 - Short Description: Montreal
 - Language Code: Can French
 - Country: CAN
 - Address: Place Ville Marie, 300 St-Catherine Street, Suite 1100, Montreal QC P3F 2W1
- Navigation:** Find | View All | First | 1 of 1 | Last
- Links:** [Edit Address](#), [Phone](#)

Location Address page

Building	Enter the building location, if applicable. For example, your corporate headquarters might be located in building 4 in an office park.
Floor # (floor number)	Enter the floor number, if applicable.
Language Code	Select the code for the official language used at this location.
Phone	Click this link to enter phone numbers.

Setting Up a Location Profile

Access the Location Profile page.

The screenshot displays the 'Location Profile' page for SetID: SHARE and Location Code: KCQC00. The page is divided into several sections:

- Location Profile Header:** Includes 'Find | View All' and pagination 'First 1 of 1 Last'.
- Description:** Montreal Office
- Effective Date:** 01/01/1980
- Status:** Active
- Salary Default:** SetID: SHARE, Plan: (empty)
- Reg Region:** CAN
- Holiday Schedule:** KC01 (Canadian Holiday Schedule)
- Etab ID:** (empty)
- Canada Section:**
 - Canadian Census Metropol Area: Montreal, Quebec
 - CEC Management Area: (empty)
 - Geographical Location Code: (empty)
 - Office Type: (empty)
- Switzerland Section:**
 - Municipality Code: (empty)

Location Profile page (1 of 2)

The screenshot displays the 'Location Profile' page for a specific location, showing fields for various countries. The page is organized into sections for Germany, Spain, United Kingdom, USA, and Mexico.

- Germany:** Fields for Tariff, Tariff Area, Spokesmen Committee ID, and Industrial Inspection ID.
- Spain:** Field for Last Matricula Number Assigned.
- United Kingdom:** Field for Northern Ireland Reportable.
- USA:** Field for Taxing Locality. Below this is a table titled 'Establishments' with columns 'Establishment ID' and 'Description'. The table shows one entry with ID '1'. Navigation buttons (First, 1 of 1, Last) and a search icon are present.
- Mexico:** Fields for Fonacot ID Number, FONACOT Office, Local Tax (checkbox), and Special Local Tax.

Location Profile page (2 of 2)

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

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

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

Plan

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

See *PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, “Setting Up Plan Salaries,” Setting Up Salary Plans, Grades, and Steps.

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

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

See [Chapter 13, “Setting Up Jobs,” Classifying Jobs](#), page 227.

Reg Region (regulatory region)

Enter the regulatory region that is associated with this location.

Holiday Schedule

Select a holiday schedule for this location.

Note. The holiday schedule on this page is for informational purposes only. Assigned pay groups control default holiday schedule.

(CAN) Canada

Canadian Census Metropolitan Area (Canadian Census Metropolitan Area)

The system displays the Canadian Census Metropolitan Area (CMA) code that is prescribed by Statistics Canada according to the address information that you entered in Location Table 1 (you can override this information). CMA refers to the main labor market area of an urban core with a population of at least 100,000. This field is required.

CEC Management Area (Canada Employment Center Management Area)

Select from the list of options.

Geographical Location Code

Enter the geographic location code as defined by Statistics Canada.

See [Chapter 4, “Understanding Regulatory Regions in PeopleSoft HRMS,”](#) page 29.

See *PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements*, “(CAN) Meeting Regulatory Requirements for Canada”.

(CHE) Switzerland

Municipality Code

The default value is the municipality code that corresponds to the postal code of the location address. You can select a different code from the list of valid municipality codes for the canton that this location is in.

(DEU) Germany

Tariff

Enter the *tariff*, or the type of business conducted at this location, such as banking, retail industry, printing, or wood processing.

Industrial Inspection ID

Select the ID for this location from the list of values, if appropriate. Industrial inspection codes are included on Incident and Illness Reports

that record the worker accidents and illnesses incurred on the job in the Monitor Health and Safety business process.

Note. When you enter an employee's location on the Job Table, the Tariff and Tariff Area values appear by default from the Location Table, based on the values that you entered on that table for this location.

When you enter an employee's location on the Job Table, the Spokesman Committee ID and Works Council ID values appear by default on the employee's Job record. These values are based on the employee's location in the Job Table and the value of the Labor Type (*Management* or *Non-Management*) in the employee's Job Labor record.

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations*, "Requesting Works Councils Approval".

(ESP) Spain

Social Security Work Center The Spanish government requires employers to link each location to a Social Security work center. Select the work center for this location from the list of options. You maintain work center data in the ESP SS Work Center (Spanish Social Security work center) component.

Last Matricula Number Assigned The Spanish government requires employers to assign each employee a unique matricula number, which is used for government reporting. To avoid duplication of numbers, this field updates and stores the last matricula number assigned.

See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables.

(GBR) United Kingdom

Northern Ireland Reportable Select if this is a Northern Ireland reportable location. Indicates that employees in this location are to be included in the community background report (Fair Employment Monitoring Return) that is provided for Northern Ireland.

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

USA

Taxing Locality For U.S. companies, select a U.S. taxing locality. This field is for information only.

Estab ID (establishment ID) Select one or more establishment IDs for this location.

Use the establishment-location relationship for affirmative action planning, EEO (Equal Employment Opportunity), OSHA (Occupational Safety and Health Administration), and other U.S. federal reporting regulations.

(MEX) Mexico

Fonacot ID Number	Enter the FONACOT ID for your location. FONACOT is a consumer fund for employees.
FONACOT Office	Identify the nearest FONACOT office for your location.
Tax Local	Select the Tax Local check box if the location of the state is Chihuahua.
Tax local Special	If the location of the state is Chihuahua, the Tax Local Special field will default to Ciudad Juarez.

See Also

PeopleSoft Payroll for North America PeopleBook

(USF) Establishing Locations

Use the Work Location Table to establish physical locations within your organization, such as agency headquarters, branch offices, regional offices, and so forth.

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

(USF) Pages Used to Establish Locations

Page Name	Object Name	Navigation	Usage
Location Address	GVT_LOC_TABLE1	Set Up HRMS, Foundation Tables, Organization, Location USF	Add work locations.
Geographic Location Table	GVT_LOCATION	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Geographic Location	Define geographic locations.
Locality Pay Area Table	GVT_LOCAREA_TABLE	Set Up HRMS, Product Specific, Compensation, Locality Pay Area USF	Define the regions where federal employees receive additional pay above their base pay.
Run Control	PRCSRUNCNTL	- Set Up HRMS, Product Specific, Workforce Administration, Workforce Reports USF, Work Location Table - Set Up HRMS, Product Specific, Workforce Administration, Workforce Reports USF, Geographic Location - Set Up HRMS, Product Specific, Compensation, Locality Pay Area Rpt USF	Use this page to run these reports: - Work Location Table report (FGPER817) prints a detailing of the Work Location Table. - Geographic Location Table report (FGPER802) produces a detailing of the Geographic Location Table. - Locality Pay Area Table report (FGPER807) prints information for every Locality Pay Area.

Adding Work Locations

Access the Location Address page.

Building

Enter the building where the location is, if applicable. For example, your national office might be located in the main building of your complex.

Geoloc Cd (geographic location code)

Select the geographical location code.

Designated Agt (designated agent)

Select the designated agent code.

Country

Select a country from the list of values and move out of the field. The system displays the appropriate address fields for the country that you selected, using the standard address format that you have set up in the Country Table.

Defining Geographic Locations

Access the Geographic Location Table page.

Geographic Location

Geog Location Code:010000009

Geographic Location

Find | View AllFirst1 of 1Last

*Effective Date:01/01/1980

*Status:Active

+ -

City Code/Name:0000BLOUNT

County Code/Name:009Blount

State/Country Code:01Alabama

MSA:1000CMSA:

Postal Codes:ALUSA

*Locality Pay Area:88Rest Of Contiguous Us

*LEO Special Pay Area:0Non LEO Area

Locality Pay Percentages

Locality Percentage:0.00IGA Percentage:0.00LEO Percentage:0.00

Geographic Location page

City Code/Name The system assigns a city code. Enter the city name.

**Locality Pay Area and
LEO Special Pay Area** Select from the list.
(law enforcement officer
special pay area)

Note. PeopleSoft Payroll for North America references the Tax Location Table for location information.

See Also

PeopleSoft Payroll for North America

Defining Regions for Employees Who Receive Additional Pay

Access the Locality Pay Area Table page.

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PeopleSoft Proprietary and Confidential

Locality Pay Area Table							
Locality Pay Area: 17 Dallas-Fort Worth							
Locality Pay Area Customize Find View All First ◀ 1-8 of 8 ▶ Last							
	*Effective Date	*Status	*Description	Locality Percentage	IGA Percentage		
1	01/02/2000	Active ▾	Dallas-Fort Worth	8.59	0.00	+	-
2	01/01/1999	Active ▾	Dallas-Fort Worth	7.47	0.00	+	-
3	01/03/1998	Active ▾	Dallas-Fort Worth	6.90	0.00	+	-
4	01/05/1997	Active ▾	Dallas-Fort Worth	6.40	0.00	+	-
5	01/07/1996	Active ▾	Dallas-Fort Worth	6.23	0.00	+	-
6	01/08/1995	Active ▾	Dallas-Fort Worth	5.65	0.00	+	-
7	01/09/1994	Active ▾	Dallas-Fort Worth	4.21	0.00	+	-
8	01/01/1900	Active ▾	Dallas-Fort Worth	0.00	0.00	+	-

Locality Pay Area Table page

Federal employees in certain regions receive additional pay above their base pay. PeopleSoft delivers this data, but you might need to change it based on Office of Personnel Management updates.

Effective Date

The first time you set up this table, select an effective date that is early enough to accommodate your organization's oldest historical information.

Status

Select a status.

Note. Add data rows and use the scroll bar, the Effective Date field, and the Status field to maintain history data for information that changes over time. For example, to retire a Locality Pay Area, insert an effective-dated row with a status of *Inactive*.

Locality Percentage

Enter the percentage of base pay employees in this region receive above their base pay, which is set by their pay plan, grade, and step. The amount appears on the employee's Compensation Data page in Administer Workforce.

Setting Up Company Locations

Set up company location information using the Company Location Table page.

Pages Used to Set Up Company Locations

Page Name	Object Name	Navigation	Usage
Company Location Table	COMP_LOC_TBL	Set Up HRMS, Foundation Tables, Organization, Company Location	Associate Works Council IDs with companies and locations.

Establishing Company Locations

Access the Company Location Table page.

Company Location Table page

Works Council ID Select the ID of the Works Council representing employees at this company and location.

(DEU) Germany

Spokesmen Committee ID Select the works council Spokesmen Committee ID.

Social Insurance ID Select a Social Insurance ID.

Defining Establishments

You use the Establishment Table to define distinct physical places of business (establishments) within your company, to enter address information, and to enter regulatory reporting information. In PeopleSoft Human Resources, you define establishments that are consistent with the regulatory requirements of your business operations.

In PeopleSoft Human Resources, an establishment:

- Has an address.
- Is associated with a company.

- Is used for regulatory purposes.

An establishment isn't necessarily a single building or location; it could be an entire industrial or office complex, but it is usually a physical place for which information is reported as a consolidated unit.

Two examples of how establishments are used:

- Occupational Illness and Injury Record keeping (OSHA 200) and Equal Employment Opportunity/Affirmative Action reporting in the United States.
- Social Security and business statistical reporting in France.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(USA) Meeting Regulatory Requirements for the United States”

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(FRA) Meeting Regulatory Requirements for France”

Pages Used to Define Establishments

Page Name	Object Name	Navigation	Usage
Establishment Address	ESTAB_TBL1_GBL	• Set Up HRMS, Foundation Tables, Organization, Establishment • Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Establishments	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.
Phone Numbers	ESTAB_TBL2_GBL	Set Up HRMS, Foundation Tables, Organization, Establishment	Enter the establishment's telephone, fax machine, and other related numbers.
Controlled Establishments	CONTROLLED_ESTABS	Set Up HRMS, Foundation Tables, Organization, Controlled Establishments	Shows all establishments that have designated the selected Headquarters Unit as their Controlling Establishment.

Creating an Information Profile for a Business Establishment

Access the Establishment Address page.

Establishment Address

Phone Numbers

Establishment ID: 24200

Establishment Address

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1990

*Status: Active

+ -

*Description: Accord State Univ

Short Desc:

*Reg Region: USA United States

☐ Headquarters Unit

Company: PSU Accord State University

Country: USA United States

Address: 4213 University Terrace
Nelson, NY 34545
Nelson

Edit Address

Spain

Insurance Company Code:

Social Security Company Numbers

Customize | Find | View All | First 1 of 1 Last

	*SSN Employer	Scheme ID	SSN EE Type	Main SS Nbr.	IA Code	Days Type		
1							+ -	

Establishment Address page (1 of 4)

▼  France

SIREN Code: ☒ TDS Declared Establishment

NIC Code: Declared Establishment:

APE Code:

CRAM Fund ID:

Labor Agreement:

Bank ID:

Counter#/Acct#/RIB Key:

Transport Rate:

URSSAF Code: ☒ Annual Report Declaration

URSSAF #:

ASSEDIC #:

Base Scheme:

Tax on Salary Liability:

Establishment Activity:

Medical Organization Code:

FONGECIF:

Establishment Pension/Contingency Funds [Customize](#) | [Find](#) | [First](#) 1 of 1 [Last](#)

	*Pension Code	*Institution #	*Membership #	Co. Memb. #	Description	Population Category		
1								

Establishment Risk [Find](#) | [View All](#) [First](#) 1 of 1 [Last](#)

*Risk Code	AT SECTION	Code AT	Standard Rate	
	00			

Establishment Address page (2 of 4)

▼ Mexico

Building: Guide Number:

IMSS Zone: IMSS Subzone:

IMSS Sector: Risk Factor:

Wage Zone:

▼ USA

Section B

NAICS: SIC:

EEO Unit Number: Vets 100 Unit Number:

Controlling Establishment ID:

Section C

☐ EEO-1 Minimum 100 Employees ☐ EEO-1 Filed Previous Year

☐ EEO-1 Company Affiliated Dun and Bradstreet Number:

*EEO-1 Gov't Contractor Type:

Section D

☐ Employ Apprentices

Establishment Address page (3 of 4)

Section E

Location same as last year: ☒ Yes ☐ No ☐ No report last year

Major business activity same as last year: ☒ Yes ☐ No ☐ No report last year

Estab. major business activity:

Locations [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Location SetID	Location Code	Description
1	PSUSI	PACSU Accord State University,Campus

Establishment Address (4 of 4)

Headquarters Unit

Select if the establishment that you're defining is your headquarters. Designate at least one establishment in your company as the headquarters.

(ESP) Spain

Insurance Company Code	Select the code of the insurance company that represents the establishment (work center) in work-related injuries. These codes are maintained on the (ESP) Insurance Company Tbl page.
SSN EE Type (social security number employer type)	Select the SSN type— <i>Apprentice</i> , <i>Regular</i> , or <i>Training</i> —based on the type of contract you have with your employees.
SSN Employer	Enter the social security number as assigned by the Spanish government.
Main SS Nbr.	Select if the entry in the SSN Employer field is the main number for this establishment (work center). One work center can have more than one employer social security number.
IA Code (industry activity code)	Enter the IA code, which is maintained on the (ESP) Industry Activity Tbl page.

(FRA) France

NIC Code (Numero Interne de Classement code).	Enter the NIC code for the establishment. NIC numbers identify the entities that are inside the same enterprise. The English translation of <i>Numero Interne de Classement</i> is Internal Number of Filing.

Note. The SIRET number (*Systeme Informatique pour le Repertoire des Etablissements*, or Electronic List of Entities) is an identifying number that is given to a French business by the INSEE (*Institut National de la Statistique et des Etudes Economiques*, or National Institute of Statistics and Economics Information). INSEE is an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers and is used by the tax and social security authorities to identify a business enterprise and its entities.

CRAM Fund ID (Caisse Regionale d'Assurance Maladie fund ID)	Select a CRAM fund ID. CRAM is the regional social body that deals with the prevention of and compensation for industrial injuries. The CRAM office oversees the local CPAM (<i>Caisse Primaire d'Assurance Maladie</i>) offices that manage occupational health care coverage.
Counter#/Acct #/RIB Key (counter number/account number/RIB key)	Enter the Counter#/Acct #/RIB Key information.
Transport Rate	Enter the transport rate. The transport rate is a statutory deduction. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. The region uses this deduction to subsidize transportation and maintain and build roads. PeopleSoft Global Payroll uses the transport rate that you enter here.

URSSAF Code (Union de Recouvrement de la Securite Social et des Allocations Familiales code) and URSSAF # (URSSAF number)	Enter an URSSAF code and number. The URSSAF is responsible for ensuring payment of Social Security contributions by all French employers.
Base Scheme	Enter the Social Security code for DADS.
Tax on Salary Liability	Indicate if the tax on salary liability is complete, partial or if there is no liability to this tax.
Establishment Activity and Medical Organism	Select an establishment activity and medical organism. Used for Single Hiring Statement reporting.

Establishment Pension/Contingency Funds

Pension Code and Institution # (institution number)	Enter the pension code or the institution number of the pension companies used by this establishment.
Membership #	Enter the membership number that the pension company assigned to this establishment when it registered the establishment.

Establishment Risk

Risk Code	Enter the risk code. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.
AT Section (Section Accident du Travail section)	System-displayed information that you need to identify the risk code by establishment. The English translation of <i>Section Accident du Travail</i> is Work Accident Section.
Standard Rate	Enter the standard rate information. The various rates are associated by the risk code that is used at the department level to specify the work accident rate for the department.

(MEX) Mexico

Enter the Registros Patronal information required for social security and tax purposes.

Building	Enter the building for your company's address.
Guide Number	Enter the number provided by the IMSS authority. The guide number is used as a reference when you submit reports to the IMSS.
IMSS Zone, IMSS Subzone, and IMSS Sector	Select the IMSS zone, subzone, and sector for your company's location. The IMSS zone, IMSS subzone and IMSS sector indicate the office where you can make your payments.
Risk Factor	Enter the risk factor that's used for IMSS tax calculation.

Wage Zone

Select the economic zone for your company's location. Wage zones dictate minimum wages. Valid values are *A Zone*, *B Zone*, and *C Zone*.

(USA) USA

Enter information in the following USA-specific sections.

Section B

NAICS (North American Industrial Classification System), **Controlling Establishment ID**, **SIC** (Standard Industrial Classification), and **Vets 100 Unit Number**

Enter the NAICS code, controlling establishment ID, SIC code, and Vets 100 unit number, if any apply to this establishment.

Section C

EEO-1 Minimum 100 Employees, EEO-1 Company Affiliated

Select if they apply to this establishment.

EEO-1 Filed Previous Year

Selected by default. If you didn't file an EEO-1 report for this establishment last year, clear this check box.

Section E

Location same as last year

Select Yes or No to indicate whether your location is the same as last year, or select No Report if you made no report last year.

Major business activity same as last year

Select Yes or No to indicate whether your business activity is the same as last year, or select No Report if you made no report last year.

Estab. major business activity (establishment's major business activity)

Enter a description of the establishment's major business activity. The description is limited to the four lines that appear on the page.

Locations

Location SetID, Location Code, and Description

Enter one or more location codes to associate with this establishment.

See Also

Chapter 16, "Setting Up Local Country Functionality," (ESP) Setting Up Spanish Control Tables , page 290

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

Setting Up Establishment Phone Numbers

Access the Phone Numbers page.

The screenshot shows the 'Phone Numbers' page for Establishment ID 24200. The page has two tabs: 'Establishment Address' and 'Phone Numbers'. The 'Phone Numbers' tab is active. The page displays the following information:

- Establishment ID:** 24200
- Establishment Description:** Accord State Univ
- Effective Date:** 01/01/1990
- Status:** Active
- Phone Numbers Section:**
 - Phone Type:** A dropdown menu.
 - Phone:** A text input field.
 - Buttons:** '+' and '-' buttons to add or remove phone numbers.
- France Section:**
 - Contact for Establishment:** A text input field with a search icon.

Phone Numbers page

Phone Type and Phone Enter phone information for this establishment.

(FRA) France

Contact for Establishment Select the contact for this establishment.

Maintaining Departments

After you define company and location data for your enterprise, use the Department Table to define business entities in your organization. If you're using PeopleSoft Payroll for North America or PeopleSoft Global Payroll, you must set up department codes according to your cost centers where you charge wages. If you use PeopleSoft Pension Administration, you need departments to house your pension payees. You can use a single department for all your pension payees, or you can organize your payees using a department scheme that meets your reporting needs. Otherwise, you can set up departments using any groupings you like.

The departments that you create are also the foundation for building security for employee and pension payee data; that is, granting and denying user access to rows of data in employee tables, categorized by department. To build security, you use departments to set up a reporting hierarchy in a security tree in PeopleSoft Tree Manager. Then you set up user security access and restrictions.

PeopleSoft Human Resources offers two ways to access the Department Table to define and view departments:

- From the Manage Human Resources menu.
- From PeopleSoft Tree Manager.

In this section, we discuss using the Department Table from within the Manage Human Resources menu.

Standard PeopleSoft HRMS security uses department as the means of securing data, including all payroll data. If you use PeopleSoft Payroll for North America or PeopleSoft Global Payroll, and your departments don't reflect your security structure for restricting access to employee data, use a different field for security.

The remainder of this section discusses how to:

- Define basic information about a department.
- Enable and control department information for specified customers.
- Print reports of your department table and department security.

See Also

[Chapter 9, “Administering PeopleSoft Security,” page 87](#)

PeopleTools PeopleBook Tree Manager

Pages Used to Maintain and Report on Departments

Page Name	Object Name	Navigation	Usage
Department Profile	DEPARTMENT_TBL_GBL	Set Up HRMS, Foundation Tables, Organization, Departments	Define basic information about a department. For Payroll for North America: Use department IDs for accounting purposes, such as charging earnings to a department or implementing labor distribution accounting. The system uses department IDs when you sequence pay sheets and paychecks by department.
Comm. Acctg. and EG (department table - commitment accounting and education and government)	DEPARTMENT_TBL_CA	Set Up HRMS, Foundation Tables, Organization, Departments	Enable and control department information that is specific to Education and Government customers and customers who use the Commitment Accounting feature.
Department Table Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Organization, Department Table Report	Use this page to run the Department Table report (PER701) that lists all departments by Department ID.

Defining Basic Information About a Department

Access the Department Profile page.

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

SetID: SHARE **Department:** 10000 [Business Units that use this Setid](#)

Department Profile Find | View All First 1 of 1 Last

***Effective Date:** 03/22/1985

***Status:** Active

***Description:** Human Resources

Short Desc: HR

Location SetID: SHARE

Table Set shared across Corp

Location: KUNY00

Corporation Headquarters

Company: GBI

Global Business Institute

MgrID: KU0005

Aliverdi,Reza K

Manager Position:

EmplID:

Budget Year End Date:

***Budget Level:** Department

Belgium

Industrial Committee:

NACE Code:

Department Profile page (1 of 3)

▼  Canada	
Tax Location: 	Stats-Can Dept Code:
GL Account #-Expense: 610000	Stats-Can Faculty Code: 
Non Comm. Acctg.	
Canadian Indus Sector: 	
▼  Germany	
Tax Location Code: 	
Accident Insurance: 	
Hazard: 	
Social Insurance Accident #:	
▼  France	
Establishment ID: 	
Risk Code: 	
▼  USA	
Tax Location Code: 	
GL Account #-Expense: 610000	
Non Comm. Acctg.	
U.S. EEO4 Function: Financ Adm	

Department Profile page (2 of 3)

▼  New Zealand	
Classification Unit: 	
▼  Australia	
Higher Education	
Organizational Unit: 	
Work Sector:	
Australian Public Service	
Agency Code:	
▼  Mexico	
Cost Center: 610000	

Department Profile page (3 of 3)

Effective Date	If you add a new department to the Department Table from the Manage Human Resources menu, set its effective date to predate (or be equal to) the effective date of your security tree.
Description	For Payroll for North America: If you use the department specified on the employee's Job record to indicate where to deliver checks, the system automatically prints the department description and code on the check.
Location	To associate a department with a physical location, select the location. Maintain these values in the Location Table.
Company	Indicate the company to which this department belongs. The system uses the Company field value as the default company location on the job records for all employees associated with this department. If you hire employees into this department, the system assumes that they are also employees of the designated company. If you don't enter a company here, you can enter it on the Job Data pages. If you do enter a company here, you can't change it on the Job Data pages.
Note. If yours is a multicompany environment and you want more than one company to share the department, leave the <i>Company</i> field blank.	
Manager ID	The manager ID that you select becomes the default supervisor ID on the employee records of all employees who are assigned to this department. If you have more layers in your organization, override the default. If you use partial position management, where you use positions for only a portion of your organization, select either the Manager ID number or the Manager Position number. When you select either field, the system disables the remaining field.
Manager Position	If you use position management, and you have created positions for this department, select a Manager Position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data.
Note. The system allows you to select any position. To have the system prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Engine so that the prompt table for this field is DEPT_POSITIONS.	
Budget Year End Date	If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.
Budget Level	Select <i>Department</i> , <i>Job Code</i> , <i>Line Item</i> , <i>Position Number</i> , or <i>None</i> to define budgeting for this department.
(BEL) Belgium	
Industrial Committee	Select the industrial committee for the company. This can be overwritten at the department level if necessary.

NACE Code

Enter the NACE code for the company.

Note. The NACE code can range from 5 digits for group level, 6 for class level, and 7 for subclass level.

(CAN) Canada**Tax Location**

Specify the tax jurisdiction for the department. The code that you enter populates the Tax Distribution records of employees of this department. You can override this information for individual employees.

GL Account #-Expense
(general ledger account number – expense)

Enter the GL account to which payroll expenses for this department should be posted.

Note. This field is not required for PeopleSoft Payroll for North America and not applicable to PeopleSoft Payroll for Education and Government.

Canadian Indus Sector
(Canadian industrial sector)

Select the code that identifies the sector with which employees in this department are associated for Canadian employment equity reporting purposes.

Stats-Can-Dept Code
(Statistics Canada department code)

Enter a 3-character code to be reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

Stats-Can Faculty Code
(Statistics Canada faculty code)

Select a code to associate a faculty with a department. Faculty codes are set up in the StatsCan Faculty Code table and are used to associate medical and dental categories with faculties. The system uses the faculty code that is associated with this department to determine the medical and dental categories that are reported in the Canada Academic Teaching Survey. This field is intended for Canadian higher education degree-granting institutions only.

See *PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events*, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process”.

(DEU) Germany**Tax Location Code**

Select a code.

Note. For more information about how tax location codes affect payroll processing for North America, see your PeopleSoft Payroll for North America documentation.

Note. The Accident Insurance, Hazard, and Social Insurance Accident # fields are used to monitor Health and Safety business process functionality in PeopleSoft Human Resources.

(FRA) France**Establishment ID**

Select an establishment ID for this department. French Social Security defines a risk code for your establishment, based on the number of work accidents

that have occurred in the past three years in a particular establishment. Your establishment must contribute to a Work Accident fund, based on the number of work accidents that occur in your establishment; the more accidents you have, the more you pay into the fund.

Risk Code

Select a risk code from the list of risk codes. You define your organization's percentage of contributions to the French Social Security fund at the department level, based on the risk code that you enter.

(USA) USA**Tax Location Code**

Specify the tax jurisdiction for the department. The code that you enter populates the Tax Distribution records of employees of this department. You can override this information for individual employees.

GL Account #-Expense
(general ledger number - expense)

Enter the GL account to which payroll expenses for this department should be posted.

Note. This field is not required for PeopleSoft Payroll for North America and not applicable to PeopleSoft Payroll for Education and Government.

U.S. EEO4 Function
(United States Equal Employment Opportunity 04 function)

Select the functional category, such as health or fire protection, that applies to this department. The option that you select affects your EEO reporting to the U.S. federal government.

(NZL) New Zealand**Classification Unit**

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

(AUS) Australia

These fields appear only if you selected the Education & Government check box on Country Specific page of the Installation component.

Organizational Unit

Enter the appropriate Higher Education organizational unit code.

Agency Code

Enter the four-digit Australian Public Service code for this department.

(USF) Department Table Page

For U.S. federal installations, use the Department Table page; fields are the same.

Enabling and Controlling Department Information for Specified Customers

Access the Comm. Acctg. and EG page.

The screenshot displays the 'Comm. Acctg. and EG' configuration page. At the top, there are tabs for 'Department Profile' and 'Comm. Acctg. and EG'. Below the tabs, the 'SetID' is 'SHARE' and the 'Department' is '10000'. The 'Effective Date' is '03/22/1985' and the 'Status' is 'Active'. There is a 'Find | View All' button and a pagination indicator 'First 1 of 1 Last'. The 'FTE Edit Indicator' is set to 'No Edit'. The 'Tenure Processing' section has a checkbox for 'Can Grant Tenure'. The 'Commitment Accounting' section has checkboxes for 'Use Comm. Acctg. / Budgeting', 'Use Encumbrance Processing', 'Use Actuals Distribution', and 'Use TL Distribution'. The '*Budget with Department' field is set to '10000'.

Comm. Acctg. and EG page

FTE Edit Indicator
(full-time equivalency edit indicator)

Select whether you want the system to display a warning or an error message when you exceed the FTE maximums for this department. If you don't want the system to perform an FTE edit for this department, select *No Edit*.

Tenure Processing

Can Grant Tenure

Select to be able to grant tenure to qualified employees in this department.

Commitment Accounting

Use Comm. Acctg. / Budgeting?

Select if you use Commitment Accounting processing for this department. When you select this check box, the Use Encumbrance Processing? and Use Actuals Distribution? check boxes become available for entry and are selected by default.

Use Encumbrance Processing?

Select if you use Commitment Accounting encumbrance processing for this department.

Use Actuals Distribution?

Select if you use Commitment Accounting's Actuals Distribution process for this department.

Budget with Department

An accumulated budget for a group of departments rolls up to the department that you enter.

The department that you enter must be in the same SetID as the department that you are defining, and it must be higher on the security tree. For example, if departments 00010 and 00012 are lower on the security tree than department 00005 and they have the same SetID, then departments 00010 and 00012 can budget with department 00005. The budgets for 00010 and 00012 roll up into a single budget with 00005.

Use TL Distribution?

Select to take into account the task information that is entered into PeopleSoft Time and Labor during Commitment Accounting's Actuals Distribution process. This check box applies only to PeopleSoft Time and Labor customers.

If you select this check box, the Actuals Distribution process creates an entry for each Time and Labor task entry. It then distributes the earnings in the appropriate ratio (the same ratio that is used for Labor Distribution).

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, "Setting Up Track Faculty Tenure," Setting Up Tenure Tracking

PeopleSoft 8.8 Human Resources PeopleBook: Manage Commitment Accounting, "Creating and Posting Actuals Data to PeopleSoft Financials," Running the Actuals Distribution Process

(USF) Setting Up Departments

This section discusses how to:

- Set up departments.
- Set up the Commitment Accounting feature for a department.
- Run a Structured Query Report (SQR) audit to cross-check departments.

Note. The Department Profile and Comm. Acctg. and EG pages in the USF Department Table component are identical to those in the Department Table component and share the same object names.

Page Used to Set Up Federal Departments

Page Name	Object Name	Navigation	Usage
Department Table	GVT_DEPART_TBL_USA	Set Up HRMS, Foundation Tables, Organization, Departments USF	Set up departments.

Setting Up Departments

Access the Department Table page.

Effective Date

Important! If you add a new department to this Department Table from the Manage Human Resources (USF) menu, set its effective date to predate (or be equal to) the effective date of your security tree.

Sub-Agency

Select the sub-agency to which this department belongs.

Note. The system uses the Company and Sub-Agency fields as the default agency/sub-agency location on the Job records for all employees who are associated with this department. If you hire employees into this department, the system assumes that they are also employees of the designated agency/sub-agency. If you don't enter an agency here, you can enter it on the Job Data pages. If you do enter an agency here, you can't change it on the Job Data pages.

Manager ID

The manager ID that you select becomes the default supervisor ID on the employee records of all employees who are assigned to this department. If you have more layers in your organization, override the default.

Manager Position

If you use position management, and you create positions for this department, you can select a manager position number. This field is optional, but you might find it useful for reporting activities such as departmental hierarchical data. When you select a manager position number, the system displays whether an employee is assigned to the manager position.

Note. You can select any position in this field. To have the system to prompt you with positions that are only in this department, update the DEPT_TBL in PeopleSoft Application Engine so that the prompt table for this field is DEPT_POSITIONS.

If you use partial position management, where you use positions for only a portion of your organization, you can use either the Manager ID number or the Manager Position number. When you select either field, the system disables the remaining field.

GL Account #-Payroll Expense (general ledger account number - payroll expense)

Enter the GL account to which payroll expenses for this department should be posted.

Budget Year End Date

If you handle your budgeting in PeopleSoft Human Resources, enter the last month and day of the budget year as the date for all positions in this department.

Level

Select *Department*, *Job Code*, *Line Item*, *Position Number*, or *None* to define budgeting for this department.

EEO4 Function

Select the functional category, such as health or fire protection, that applies to this department. The option you select affects your EEO reporting.

See Also

PeopleTools PeopleBook: Application Designer, "Creating Record Definitions"

PeopleSoft Human Resources PeopleBook: Manage Positions

PeopleSoft Payroll for North America PeopleBook

Running an SQR Audit to Cross-Check Departments

When you add new departments to the Department Table, also add them to your security tree so that they are a part of your security structure. After you build your security tree, you can run a SQR audit (PER506) to determine which department IDs are in the Department Table but not in the security tree. This SQR also lists the departments that are in the security tree but not in the Department Table. The latter situation can occur if you delete a department from the system and don't remove the node from your security tree.

The procedures for running SQRs vary with your application environment. If you aren't sure of your standard procedures, ask your system administrator.

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

Setting Up Primary Permission List Preferences

You use the Primary Permission List table to set predefined TableSet Sharing and system-wide defaults and settings for each of your primary permission lists. Primary permission lists are assigned to the user on the User Profile — General page. The system will default in the values you indicate for a particular permission list on the Primary Permission List Preferences table, such as Business Unit, SetID, Currency, Country, and/or Company Code when a user who is associated with that permission list logs in to PeopleSoft HRMS. Primary permission lists also control user access to country functionality, as determined on the Maintain Global Security — Global Panels page.

See Also

Chapter 9, “Administering PeopleSoft Security,” Setting Up Security for Local Functionality , page 113

PeopleSoft Security PeopleBook, Working With Permission Lists

Pages Used to Set Defaults for Permission Lists

Page Name	Object Name	Navigation	Usage
Defaults	OPR_DEF_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List	Set predefined TableSet sharing and system-wide defaults for each of your primary permission lists.
Settings	OPR_DEF_TBL_HR2	Set Up HRMS, Foundation Tables, Organization, Org Defaults by Permission List	Set Payroll System and system-wide defaults for each of your permission lists.

Setting TableSet Sharing Defaults

Access the Defaults page.

Defaults		Settings
Primary Permission List:		HCPPEG Primary List - EG
☐ Alternate Character Enabled		
*Business Unit:	EGVBU 	Educ & Govt/State
*SetID:	EGVBU 	E&G State / Government
*Company:	PSU 	Accord State University
*Country:	USA 	United States
Regulatory Region:	USA 	United States
*To Currency:	USD 	US Dollar
Currency Rate Type:	OFFIC 	Official Rate

Defaults page

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

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

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

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

See Also

[Chapter 5, “Working With Languages,” Working With Double-Byte Characters, page 41](#)

[Chapter 3, “Understanding PeopleSoft HRMS System Data Regulation,” Understanding TableSets, page 15](#)

[Chapter 10, “Installing PeopleSoft HRMS,” Administering Country Codes, page 134](#)

[Chapter 4, “Understanding Regulatory Regions in PeopleSoft HRMS,” Associating a Regulatory Region With a Transaction, page 31](#)

[Chapter 6, “Working With Currencies,” page 51](#)

PeopleTools PeopleBook: Security

Setting Payroll System Defaults

Access the Settings page.

Defaults Settings

Primary Permission List: HCPPEG Primary List - EG

Industry: Core Industry Sector: Core ☒ Carry ID

Payroll Info

Payroll System: Payroll for North America

Standard Hours

*Default Standard Hours: 40.00 Standard Work Period: WW Weekly

Minimum Standard Hours: 20.00 Maximum Standard Hours: 40.00

▼ Canada

*Canadian Census Metropol Area: ON

*Canadian Industrial Sector: Air Transp

Settings page

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

Industry	Select <i>Government</i> if this is a U.S. federal government database. The default value is <i>Core</i> .
Industry Sector	Select <i>US Federal</i> if this is a U.S. federal government database. The default value is <i>Core</i> .
Carry ID	Select to carry the EmplID (employee ID) search key information across menus. When you select this check box, the system uses the EmplID search key that you are currently using on subsequent menus.

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

Specifying a Default Payroll System

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

Setting Default Standard Hours

Default Standard Hours	The default is <i>40</i> hours. The value that you enter here affects how the human resources system calculates FTE (full-time equivalency) for workers and affects compensation processing.
Standard Work Period	Select a standard work period. The standard work period is the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the default standard hours to calculate FTE (full-time equivalency).
Minimum Standard Hours and Maximum Standard Hours	Enter the default minimum and maximum standard hours for this SetID. The value that you enter affects how the human resources system calculates FTE for workers and affects compensation processing.

(CAN) Canada

Canadian Census Metropol Area (Canadian census metropolitan area)	Select from the metropolitan areas defined on the Translate table
Canadian Industrial Sector	Select from the list of values on the Translate table.

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

See *PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements*, “(CAN) Meeting Regulatory Requirements for Canada”.

See Also

Chapter 10, “Installing PeopleSoft HRMS,” Setting Up Implementation Defaults, page 117

CHAPTER 12

Setting Up Personal Information Foundation Tables

This chapter discusses setting up:

- Citizen status codes.
- National ID types.
- Address types.
- Name types.
- Name prefixes, suffixes, and titles.

Defining Citizen Status Codes

This section discusses the page used to define citizenship status and how to define citizenship status.

Page Used to Define Citizenship Status

Page Name	Object Name	Navigation	Usage
Citizen Status Table	CITIZEN_STATUS	Set Up HRMS, Foundation Tables, Personal, Citizen Status	Define the citizenship statuses you'll need to track for employees and dependents from various countries. For example, you may need to distinguish between a native, a naturalized citizen, or a permanent resident of a particular country.

Defining Citizenship Statuses

Access the Citizen Status Table page.

Citizen Status Table

Country: AUS Australia

Country Citizenship Definition

Customize | Find | View All |  First 1-8 of 9 Last

	*Status	*Description	Short Description		
1	1	Native	Native	+	-
2	2	Naturalised	Naturalise	+	-
3	3	Alien Permanent	Alien Perm	+	-
4	4	Alien Temporary	Alien Temp	+	-
5	5	Citizen	Citizen	+	-
6	6	Foreign Worker	Foreign Wo	+	-
7	7	Permanent Resident	Perm Res	+	-
8	8	Foreign ID Card Holder	Foreign ID	+	-

Citizen Status Table page

- Country

The system displays the country code you entered to access the page. Define citizenship status codes for this country.
- Status

Enter the citizenship status code that you want to define. Enter as many citizenship codes as needed.

Defining National ID Types

This section discusses how to set up national ID types.

Page Used to Define National ID Type

Page Name	Object Name	Navigation	Usage
National ID Type Table	NID_TYPE_TABLE	Set Up HRMS, Foundation Tables, Personal, National ID Type	Assign a national ID type to a country code and provide a default or a dummy national ID for a country to use when an employee or applicant ID is unavailable.

Assigning A National ID Type to a Country Code

Access the National ID Type Table page.

National ID Type Table						
Country:		CAN Canada				
National ID Types						Customize Find View All  First 1 of 1 Last
*NID Type	Default	*Description	Short Desc	National ID Format	NID as stored	
PR	☒	Social Insurance Number	SIN	999-999-999	999999999	 

National ID Type Table page

Different countries track some form of national ID for payroll, identification, or benefits purposes. For example, German workers are assigned a Social Insurance number, UK workers have a National Insurance number, and U.S. workers have a Social Security number. Each type of national ID has unique formatting requirements.

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

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

NID Type (national ID type) Enter *PR* (payroll identification) or *NO* (none). This value controls the default national ID type when you select a national ID country on the pages where you enter national ID information for employees or applicants.

Note. Users in Germany and Japan aren't required to enter national ID data for workers, so *NO* is their default value. National ID Country and NID Type fields are configured so that users can select only *PR* if the national ID type for that country is set to *PR* on this page.

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

For example, if you enter national ID information for a new employee on the Eligibility/Identity page, and you select a national ID country of USA, the system uses the national ID type PR as the default. It also formats your 9-digit Social Security number (SSN) as 999-99-9999 to comply with the UDF formatting that is set for U.S. SSNs in PeopleSoft Application Designer. If you don't enter the correct number of digits or letters for a country's national ID, the system displays a warning message.

Note. Special PeopleCode logic performs a check-digit validation on Canadian national IDs and an 11-check validity check on Dutch national IDs.

Default

Select to have the information that you entered in the National ID Format field be the default number for applicants or employees whose national IDs are unavailable.

National ID Format

Indicate the default format for the national ID that you've added. Enter 9 as the placeholder for a number and A as the placeholder for a letter. For example, for a U.S. Social Security number or a Canadian Social Insurance number ID, you enter 999999999 because U.S. Social Security numbers and Canadian Social Insurance numbers consist of 9 digits.

For a UK National Insurance number, you enter AA999999A because those numbers consist of 2 letters followed by 6 digits and a final letter.

NID as stored (national ID as stored)

Shows how the NID is stored in the system.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Establishing Work Eligibility and Diversity

Setting Up Additional Name Information

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of employee names and titles as part of your employment records. With the Name Prefix, Name Suffix, Name Royal Prefix, Name Royal Suffix, and Title tables, you can define standard name prefixes like *Mr.* or *Mrs.* or *Mdme.* and *Mssr.*, and suffixes like *Jr.* and *Sr.*

If you're managing a European workforce, you can track additional standard naming conventions for Germany and the Netherlands, such as the royal name prefix *von* for German workers. You can also track formal titles such as *professor*, *doctor*, or *count*. These tables provide you with a flexible method for tracking a wide variety of naming conventions in your human resources system.

This section discusses how to:

- Define name types.
- Enter name prefixes.
- Define royal name prefixes.
- Enter name suffixes.
- Define royal name suffixes.

See Also

Chapter 5, "Working With Languages," page 39

Pages Used to Set Up Additional Name Information

Page Name	Object Name	Navigation	Usage
Name Type Table	NAME_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Type	Define name types and the order in which they are available.
Name Prefix Table	NAME_PREFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Prefix	Enter name prefixes that you'll use when you record employee name information.
Name Suffix Table	NAME_SUFFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Suffix	Enter name suffixes to use to record employee name information.
Royal Name Prefix	NM_ROYAL_PREFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Prefix	Enter royal prefixes and descriptions. Name Royal Prefix codes are used primarily for Germany and the Netherlands. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.
Name Royal Suffix	NM_ROYAL_SUFFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Suffix	Define royal suffixes. The Name Royal Suffix application is used only by Germany and prompts with DUEVO standards. When you enter names for workers in the Personal Data pages, you can reference these standard name royal suffixes.
Title Table	TITLE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Title	Enter titles for use with employee names. Track standard titles—from <i>professor</i> to <i>mijnheer</i> —for employee names in your human resources system.

Entering Name Types

Access the Name Type Table page.

Name Type Table					
Name Type					
Order by	Name Type CD	Name Type	Short Name		
1	PRI	Primary	Primary	+	-
2	PRF	Preferred	Preferred	+	-
3	LEG	Legal	Legal	+	-
4	DEG	Degree	Degree	+	-
5	MDN	Maiden	Maiden	+	-
6	OTH	Other	Other	+	-
7	FR2	Former2	Former2	+	-
8	FTR	Father	Father	+	-
9	FR1	Former1	Former1	+	-
10	MTR	Mother	Mother	+	-

Name Type Table page

Order by Enter the order in which the system should make this name type available.

Name Type CD (name type code), **Name Type**, and **Short Name** Enter a code for the name type, the full name type name, and a short version of the name type.

Note. You cannot edit the Primary and Preferred name types because they are system data.

Entering Name Prefixes

Access the Name Prefix Table page.

Name Prefix Table					
Name Prefix					
	*Name Prefix	Short Description	*Description		
1	Dr	Dr	Doctor	+	-
2	Miss	Miss	Miss	+	-
3	Mr	Mr	Mister	+	-
4	Mrs	Mrs	Mrs	+	-
5	Ms	Ms	Ms	+	-

Name Prefix Table page

Name Prefix Enter the name prefix you want to add. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.

The system displays the prefixes you enter here as part of the worker's name.

Note. Name prefixes aren't effective dated, nor do they have a status associated with them.

Entering Name Suffixes

Access the Name Suffix Table page.

Name Suffix Table

Name Suffix				
	*Name Suffix	Short Description	*Description	
1	Jr.	Jr.	Junior	+ -
2	Sr.	Sr.	Senior	+ -

Name Suffix Table page

Name Suffix	Enter the name suffix you want to add. When you enter names for workers in the Personal Data pages, you can reference these standard name suffixes.
Short Description and Description	Descriptions you enter for the prefix appear on the page as part of the worker's name.

Note. Name suffixes aren't effective dated, nor do they have a status associated with them.

Defining Royal Name Prefixes

Access the Royal Name Prefix page.

Name Royal Suffix

Certified By: DUEVO

Name Royal Suffix					Customize Find View All	
	*Name Royal Suffix	*Status as of Effective Date	Short Description	*Description		
1	Bar	Active	Bar	Bar	+	-
2	Baron	Active	Baron	Baron	+	-
3	Baronesse	Active	Baronesse	Baronesse	+	-
4	Baronin	Active	Baronin	Baronin	+	-
5	Brand	Active	Brand	Brand	+	-
6	Condesa	Active	Condesa	Condesa	+	-
7	Earl	Active	Earl	Earl	+	-
8	Edle	Active	Edle	Edle	+	-
9	Edler	Active	Edler	Edler	+	-
10	Erbgraf	Active	Erbgraf	Erbgraf	+	-
11	Erbprinz	Active	Erbprinz	Erbprinz	+	-
12	Ffr	Active	Ffr	Ffr	+	-
13	Freifr	Active	Freifr	Freifr	+	-
14	Freifrau	Active	Freifrau	Freifrau	+	-
15	Freih	Active	Freih	Freih	+	-

Royal Name Prefix page

Certified By

Displays the value you selected when you accessed the page: *DUEVO* for German prefixes or *NEN* for Dutch prefixes.

Name Royal Prefix

Enter a royal prefix name, using up to 15 characters.

Status

Name Royal Prefixes aren't effective dated, so to retire a prefix code, change the status to *Inactive*.

Defining Royal Name Suffixes

Access the Name Royal Suffix page.

Name Royal Suffix

Certified By: DUEVO

Name Royal Suffix					Customize Find View All 		First	1-15 of 55	Last
	*Name Royal Suffix	*Status as of Effective Date	Short Description	*Description					
1	Bar	Active	Bar	Bar	+	-			
2	Baron	Active	Baron	Baron	+	-			
3	Baronesse	Active	Baronesse	Baronesse	+	-			
4	Baronin	Active	Baronin	Baronin	+	-			
5	Brand	Active	Brand	Brand	+	-			
6	Condesa	Active	Condesa	Condesa	+	-			
7	Earl	Active	Earl	Earl	+	-			
8	Edle	Active	Edle	Edle	+	-			
9	Edler	Active	Edler	Edler	+	-			
10	Erbgraf	Active	Erbgraf	Erbgraf	+	-			
11	Erbprinz	Active	Erbprinz	Erbprinz	+	-			
12	Ffr	Active	Ffr	Ffr	+	-			
13	Freifr	Active	Freifr	Freifr	+	-			
14	Freifrau	Active	Freifrau	Freifrau	+	-			
15	Freih	Active	Freih	Freih	+	-			

Name Royal Suffix page

Certified By

The system displays the value you selected to access the page: *DEUVO* for German prefixes or *NEN* for Dutch prefixes.

Name Royal Suffix

Enter a name royal suffix, using up to 15 characters.

Status as of Effective Date

Name royal suffixes aren't effective dated, so to retire a suffix code, change the status to *Inactive*.

Defining Address Types

This section discusses how to enter address types.

Pages Used to Enter Address Types

Page Name	Object Name	Navigation	Usage
Address Type Table	ADDR_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Address Type	Enter address types and the order in which they are available.

Entering Address Types

Access the Address Type Table page.

Address Type Table

Address Type
Customize | Find | View All |  First 1-8 of 8 Last

*Order by	Addr Type CD	Address Type	Short Type		
1	HOME	Home	Home	+	-
2	MAIL	Mailing	Mail	+	-
3	BUSN	Business	Business	+	-
4	CHK	Check	Check	+	-
5	DORM	Dormitory	Dorm	+	-
6	LEGL	Legal	Legal	+	-
7	CAMP	Campus	Campus	+	-
8	OTH	Other	Other	+	-

Address Type Table page

Order by Enter the order in which the system should make this address available.

Addr Type CD (address type code), **Address Type**, and **Short Type** Enter a code for the address type, the full address type name, and a short version of the address type.

Note. You cannot edit the Home, Mailing, Business, and Check address types because they are system data.

CHAPTER 13

Setting Up Jobs

This chapter discusses how to:

- Define job function codes.
- Create and clone job profiles.
- Define job families.
- Classify jobs.
- Define job tasks and responsibilities.
- Maintain pay groups.
- Run reports of your job codes.

Defining Job Function Codes

Use job function codes to create function categories that can then be assigned to job codes. For example, you can create a job function code of Finance to describe the function of all job codes that have financial responsibility, such as job codes in accounts payables, accounts receivables, and the controller's office.

Page Used to Define Job Function Codes

Page Name	Object Name	Navigation	Usage
Job Function Table	JOB_FUNCTION_TBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Function, Job Function Table	Set up and define job function codes.

Setting Up Job Function Codes

Access the Job Function Table page.

INAIL Code (Istituto Nazionale per l'Assicurazione contro gli Infurtuni sul Lavoro code)

The INAIL code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

Defining and Cloning Job Profiles

A job profile identifies a set of competencies, sub-competencies, and responsibilities that apply to employees in the same job, job family, position, or salary grade.

If you use PeopleSoft ePerformance, job profiles can provide a simple way to evaluate all employees with the same job code, job family, position, or salary grade against the same basic criteria. Performance documents can automatically include the competencies, sub-competencies, and responsibilities that are defined for the employee's job profile. Another advantage to using job profiles in ePerformance is that you can associate one or more performance templates with employees who have the same profile.

You can clone (copy) a job profile and modify it for another job code, position, salary grade, or job family. Job profiles are effective dated.

Creating a job profile involves the following steps:

- Create a job profile ID and description.
- Select the competencies to associate with the job profile.
- Select the responsibilities to associate with the job profile.
- Select the document types and performance template that are valid for the job profile.
- Determine where a given job profile is being used.

Associating Job Profiles With Employees

You can associate a job profile with a group of employees by assigning the profile to a job code, job family, position, or salary grade. To do this, complete the Job Profile ID field on one of the following pages:

- Job Code Profile
- Job Family
- Position Data

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions*, “Setting Up Positions,” Creating Positions.

- Salary Grade Table

See *PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, “Setting Up Plan Salaries,” Setting Up Salary Grades.

See Also

PeopleSoft 8.8 ePerformance PeopleBook, “Defining Basic Settings and Tables,” Creating Job Profiles

Before You Begin

Before you create job profiles, define the following items that you plan to associate with the profiles.

- Competencies
- Sub-competencies
- Competency clusters

- Responsibilities
- Document types

Pages Used to Define Job Profiles

Page Name	Object Name	Navigation	Usage
Job Profile - General	JOB_PROFILE_TBL1	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, General	Create a job profile ID and description. IDs can be up to eight alphanumeric characters. Note. Job Profile IDs cannot be deleted.
Job Profile - Competencies	JOB_PROFILE_TBL2	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Competencies	Select competencies for a job profile. Click the tab to enter General or ePerformance specific information.
Job Profile Sub - Competencies	JOB_PROF_COMP_SEC	Click the Sub-Competencies link on the Competencies page.	Select sub-competencies for a job profile.
Job Profile - Responsibilities	JOB_PROFILE_TBL3	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Responsibilities	Select responsibilities for a job profile. Click the tab to enter General or ePerformance specific information.
Performance Templates	JOB_PROFILE_TBL4	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Performance Templates	Select the document types that are applicable to a job profile and identify the performance template for each document type.
Where Used	JOB_PROFILE_XREF	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Where Used	View the list of jobs, job families, positions, and salary grades to which the job profile has been assigned.
Clone Job Profile	EP_CLONE_JOB_PROF	Set Up HRMS, Foundation Tables, Job Attributes, Clone Job Profile	Copy an existing job profile. Once copied, you can modify the new profile.

Selecting Competencies for a Job Profile

Access the Job Profile - Competencies page.

Job Profile: H0P600

Job Profile Details Find | View All First 1 of 1 Last

Effective Date: 01/01/1996

Competency Cluster:

Competencies

*Competency	Description	Sub-Competencies	+	-
H0P602	602 Job Profile Competency	Sub-Competencies	+	-
H0P603	603 Job Profile Competency	Sub-Competencies	+	-
H0P604	604 Job Profile Competency	Sub-Competencies	+	-
H0P605	605 Job Profile Competency	Sub-Competencies	+	-

Job Profile - Competencies page (1 of 2)

Competencies

*Competency	Weight	Minimum Weight	Mandatory	Critical	+	-
H0P602	35	0	☐	☐	+	-
H0P603	40	40	☒	☒	+	-
H0P604	10	5	☐	☐	+	-
H0P605	15	15	☒	☒	+	-

Job Profile - Competencies page (2 of 2)

Competency Cluster

To load competencies from a competency cluster into this job profile, select the cluster ID and click Load Competencies. The competencies in the cluster are added to any competencies that already appear in the Competencies group box.

The system only adds competencies from the cluster that are not already associated with the Job Profile.

You define competency clusters through the Cluster Competencies page.

Load Competencies

This button is used in conjunction with the Competency Cluster field to load competencies into the job profile.

Competency

To associate a competency with a job profile, select the competency here.

Sub-Competencies

Click to access the Job Profile Sub-Competencies page where you can add to or delete from the job profile any sub-competencies that are linked to the selected competency. By default, all subcompetencies linked to the competency are associated with the job profile.

You will only need to select a sub-competency if:

- A sub-competency was added to a competency after the competency was loaded into the Job Profile.
- A sub competency was deleted from the Job Profile and then added again.

ePerformance Tab

The options on this tab apply only if you are using PeopleSoft ePerformance.

Weight	If applicable, enter the weight of the competency in relation to the other competencies for which employees with this job profile can be evaluated.
Minimum Weight	If applicable, enter the minimum weight for the competency. When performance reviews are conducted using PeopleSoft ePerformance, the manager or employee cannot adjust the weight below this minimum.
Mandatory	Select to have this item identified as mandatory on the ePerformance document, meaning that the item cannot be edited or deleted by a manager or employee.
Critical	Select to have this competency identified as a critical performance factor on the ePerformance document. No special rules are applied to critical items.

Selecting Sub-Competencies for a Job Profile

Access the Job Profile Sub-Competencies page.

Job Profile Sub-Competencies

Competency: H0P521 Test- Duplicate Competency 1

*Sub-Competency	Title	Level

Buttons: + (Add), - (Remove), Delete All Sub-Competencies

Job Profile Sub-Competencies page

The first time you access this page, it displays all sub-competencies that are linked to this competency through the Sub-Competency component. To remove a sub-competency from this job profile, click the minus (-) sign. To add a sub-competency to the profile, click the plus sign (+). To delete all the sub-competencies, click the Delete All Competencies button.

Selecting Responsibilities for a Job Profile

Access the Job Profile - Responsibilities page.

General Competencies **Responsibilities** Performance Templates Where Used

Job Profile: HOPFAM1

Job Profile Details Find | View All First 1 of 1 Last

Effective Date: 01/01/2000 + -

Responsibilities

General ePerformance

*Item ID	Title		
HOPRES14	Job Profile Test for JF1	+	-
HOPRES21		+	-

Job Profile - Responsibilities page (1 of 2)

Responsibilities

General ePerformance

*Item ID	Weight	Minimum Weight	Mandatory	Critical		
HOPRES14	0	0	☐	☒	+	-
HOPRES21	0	0	☐	☐	+	-

Job Profile - Responsibilities page (2 of 2)

Item ID To associate a responsibility with a job profile, select the responsibility here. (You define responsibilities on the Responsibilities page.)

ePerformance Tab

The options on this tab apply only if you are using PeopleSoft ePerformance.

Weight If applicable, enter the relative weight of the responsibility in relation to the others for which employees with this job profile can be evaluated.

Minimum Weight If applicable, enter the minimum weight for the responsibility. When employee reviews are conducted using PeopleSoft ePerformance, the manager or employee cannot adjust the weight below this minimum.

Mandatory Select to have this item identified as mandatory on the ePerformance review form, meaning that the item cannot be edited or deleted by a manager or employee.

Critical Select to have this competency identified as a critical performance factor on the ePerformance review form. No special rules are applied to critical items.

Selecting Document Types and Performance Templates for a Job Profile

Access the Job Profile - Performance Templates page.

Job Profile: HOPFAM1

Job Profile Details Find | View All First 1 of 1 Last

Effective Date: 01/01/2000

Document Type Templates

*Doc Type	*Template ID	Description
HOPA	HOPAVAV	

Job Profile - Performance Templates page

When documents are generated for a document type that has the template source set to one of the Job Profile options, the system refers to the information you enter here to determine which template to use. For example, say you create a document type called Annual. On the document type definition, you indicate that the template source is *Job Code (Job Profile)*. When you generate performance documents the system checks this page to determine which template to use for employees that have a job profile ID associated with their job codes.

Doc Type (document type) Select a document type that is valid for employees who are associated with this job profile. Add a row for each document type that's valid for this job profile. You define document types on the Document Types page.

Template ID For the selected document type, identify the performance template. This is the template that PeopleSoft ePerformance uses when it generates performance documents of a given document type for employees with this job profile.

If you leave this field blank, the system uses the default template that is identified on the Document Type page.

Determining Where a Job Profile is Used

Access the Job Profile - Where Used page.

General	Competencies	Responsibilities	Performance Templates	Where Used
Job Profile: H0PFAM1				
Job Codes				
<u>SetID</u>	<u>Job Code</u>	<u>Description</u>		
Job Families				
<u>Job Family</u>	<u>Description</u>			
H0PM1	Administrative			
Salary Grades				
<u>SetID</u>	<u>Sal Plan</u>	<u>Salary Grade</u>	<u>Description</u>	
Positions				
<u>Position Number</u>		<u>Description</u>		

Job Profile - Where Used page

The system lists the Job codes, job families, salary grades, and positions to which this job profile has been assigned.

Cloning a Job Profile

Access the Clone Job Profile page.

Clone Job Profile		
Job Profile:	H0PPOS1	Position 1
New Job Profile ID:	H0PPOS5	
Save Return to Search Next in List Previous in List		

Clone Job Profile page

To clone a job profile:

1. Select the ID of the job profile you want to clone.
2. Enter up to eight alphanumeric characters for the new job profile ID.
3. Click the Save button.
The system moves you to the Job Profile component.
4. Make any necessary changes on the Job Profile component.

Setting Up Job Families

Group jobs to make it easier to assign a competency or competency cluster to similar jobs. You can assign a competency or cluster to all the jobs in a family at once.

Pages Used To Set Up Job Families

Page Name	Object Name	Navigation	Usage
Job Family	JOB_FAMILY_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Family Table	Create job families and assign them job profiles.

Grouping Jobs Into Families

Access the Job Family page.

The screenshot displays the 'Job Family' page. At the top, there's a tab labeled 'Job Family' with the value 'H0PM3' entered. Below this is a section titled 'Step Increase Table'. It contains several input fields: '*Effective Date' set to '01/01/2000', '*Status' set to 'Active', '*Description' set to 'Management', 'Short Description' set to 'Mgmt', and 'Job Profile ID' set to 'H0PFAM3'. There are also navigation controls at the top right of the table, including 'Find', 'View All', 'First', '1 of 1', and 'Last'.

Job Family page

Job Profile ID Assign a Job Profile ID to this job family.

Important! The job family effective date must be effective as of the relevant job code effective dates.

Classifying Jobs

In PeopleSoft HRMS, you identify jobs by job codes, and you maintain information about jobs independent of the person or group performing that job. For example, you assign salary grades and standard hours to a job regardless of who holds it.

This section discusses how to:

- Add new job codes.
- Assign points to job evaluation criteria.

- Enter salary survey information.
- Associate salary plan information and base pay rate codes with a job code.
- Associate non-base rate codes with a job code.

When you save a job code, the system creates a rate code defaulting rule for the salary step, with the Rate Code Source Indicator equal to the job code. The system uses rate code defaulting rules (instead of the Job Code and Salary Step setup tables) for the compensation defaulting.

Understanding Enterprise Integration Points

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

Understanding Job Codes and Positions in PeopleSoft HRMS

In PeopleSoft HRMS, job codes are different from positions: Within a single job code, you can have a number of positions. For example, you can have a job code representing Administrative Assistant, and within that job code, you can have different Administrative Assistant positions—one in your Marketing department, one in Research, and one in your Compensation group. You use positions to track details on a particular job in a particular department or location. Positions usually have a one-to-one relationship with employees. Job codes have a one-to-many relationship with employees.

If you drive PeopleSoft Human Resources by position in your organization, you still use job codes to create general groupings or job classifications in your organization. You then use the Job Code groupings as the basis for default job data for positions.

Note. If you use PeopleSoft Pension Administration, set up jobs, and not positions, for your pension payees.

(JPN) Using Job Codes and Capability Grade Management in Japan

The Job Code field on the Job Details Page of Job Requisition Data is a required field. If your organization has adopted a human resources management system based on capability grade, you may not want to associate a job code with your job requisitions. However, to satisfy the requirements of that page, you need to have a dummy job code that you can enter in the Job Code field. The dummy job code has no processing associated with it. The Job Code Profile page, on which you create the dummy code, has only six required fields, but of these fields, five take default values, so you need to enter only a Job Title. We recommend using a job title that clearly indicates that this is a dummy job code.

See Also

PeopleSoft Enterprise Integration PeopleBook

[Chapter 2, “Using PeopleSoft HRMS,” Driving Your System by Employee or Position , page 6](#)

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions”

Pages Used to Classify Jobs

Page Name	Object Name	Navigation	Usage
Job Code Profile	JOBCODE_TBL1_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile	Add new job codes to the system and define job family, compensation, and regulatory information for each job code.
Business Units by Job Code	JOBCODE_BU	Click Business Units that use this Setid on the Job Code Profile page.	View all business units associated with the SetID for this Job Code.
Evaluation Criteria	JOBCODE_TBL2_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Evaluation Criteria	Assign points to certain job evaluation criteria. You can use this information to rank job codes in your company and to assess salary grades, steps, and exempt and nonexempt categories for personnel.
Salary Survey Page	JOBCD_SURVEY	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Salary Survey	Enter salary survey information for this job code.
Default Compensation	JOBCD_COMP_RATE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Default Compensation	Associate salary plan information and base pay rate codes with a job code. By associating rate codes with job codes, you define compensation packages that can be associated with a worker's Job record on the Job Information page. For Payroll for North America: Maintain compensation rate codes in the Compensation Rate Code Table in the Define Payroll Process component. You can override some rate code defaults at the job level.
Non-Base Compensation	JOBCD_NON_BASE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Non-Base Compensation	Associate non-base rate codes with a job code.

Adding New Job Codes

Access the Job Code Profile page.

Job Code Profile	Evaluation Criteria	Salary Survey	Default Compensation	Non-Base Compensation
SetID: SHARE		Job Code: 120000		Business Units that use this Setid
Job Code Profile Find View All First 1 of 1 Last				
*Effective Date:	07/03/1996	*Status:	Active	+ -
*Job Title:	Administrator			
Short Job Title:	Admnstr			
Job Description:	Administrator			
Job Function Code:		Job Profile ID:		
Job Family:		*Manager Level:	Other	
*Standard Hours:	40.00	Standard Work Period:	WV	Weekly
Workers' Comp Code:				
*Comp Freq:	A	Annual		
Regular/Temporary:	Regular	☐ Medical Checkup Required		
Union Code:				
▼ Singapore				
Festive Advance Pay Program:				

Job Code Profile page (1 of 4)

▼ **Canada**

National Occupational Classif:

Pay Equity Job Class: ☐ Seasonal

BPS Activity:

Stats-Can Acad Teaching Survey

*Report Flag:

Duties:

Education and Government

Academic Rank:

Service Calculation Group:

WCB Classification [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Province	Rate Group	Classification		

▼ **Germany**

☐ Medical Surveillance Required

▼ **United Kingdom**

UK SOC Code:

▼ **Italy**

INAIL Code:

▼ **Malaysia**

Number of Hours in a Work Day:

Festive Advance Pay Program:

Job Code Profile page (2 of 4)

▼ **USA**

*EEO-1 Job Category:

*EEO-4 Job Category:

*EEO-5 Job Category:

*EEO-6 Job Category:

IPEDS-S Job Category:

Standard Occupational Classif:

EEO Job Group:

*FLSA Status:

*Tipped:

Education and Government

Academic Rank:

Service Calculation Group:

Job Code Profile page (3 of 4)


Australia

ASCO Code:

Salary Packaging Options

Package Template ID:

Package Rule ID:

Higher Education

Job Function:

Type of Work Performed:

Annual Contact Hours:

Teaching Weeks:


Brazil

Occupation Code:

Job Code Profile page (4 of 4)

Job Code

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

(USF) Occupation Series,
Official Posn Title Code
(official position title code),
and **Organization Posn**
Title Cd (organization
position title code)

Select from the list.

(DEU) (CAN) Job Function Code

Select the code that best categorizes the job by function, such as administrative, legal, or management. This information is used for German and Canadian reporting purposes.

If your company uses PeopleSoft Payroll for North America, the Survey of Employment for Educational Institutions report (PAY110CN) uses the Job Function Code values *TCH* (teacher), *NTC* (non-teaching), and *SUP* (supply/substitute teachers).

Note. For more information, see the PeopleSoft Payroll for North America documentation.

Job Family

Enter a job family to categorize a job code into a more general grouping. For example, you might group a trust analyst and an operations analyst into a job family called *Analyst*. Job families are also used in the Manage Competencies business process.

Standard Hours

Enter the default number of hours in a normal workweek for this job. The Standard Hours value that you enter on this page becomes the default for all employees who are associated with this job code. You can modify the standard hours for an employee on the employee's Job Data pages.

The value that you assign for Standard Hours must fall between the minimum standard hours and the maximum standard hours defined in the Primary Permission List Preferences Table. If no minimum standard hours and

	maximum standard hours are defined on the Primary Permission List Preferences Table, the system uses the values on the Installation Table.
Standard Work Period	Select the time period in which employees must complete the standard hours. Maintain these values in the Frequency Table. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate FTE (full-time equivalency).
Workers' Comp Code (Workers' Compensation code)	Enter a code to specify the workers' compensation plan to which this job code belongs.
Comp Freq (compensation frequency)	The default value is the frequency that you specified in the Installation Table
Medical Checkup Required	Select if this job code requires a one-time medical checkup when the worker is hired into the job. Note. If you're tracking a German workforce, also indicate whether the job requires ongoing medical surveillance in the Job Code Profile section for local German functionality, especially if the worker comes into contact with hazardous conditions or materials on the job.
Union Code	If you're defining a job code that is associated with a union, select a union code.
(SGP) Singapore	
Festive Advance Pay Program	If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here. The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods. This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.
(CAN) Canada	
National Occupational Classif (National Occupational Classification)	Select a Canadian National Occupation classification code.
Seasonal	Select if the job is seasonal.
BPS Activity (Business Payrolls Survey activity)	If you are participating in the Statistics Canada Business Payrolls Survey, select the job code's business activity.
Report Flag	Select the appropriate option if the job code is to be reported in one of the Statistics Canada Academic Teaching Surveys.

	This field is for Canadian higher education degree-granting institutions only.
Duties	Indicate whether the duties of the job code consist of <i>Teaching only</i> , <i>Teaching & other resp</i> (teaching and other responsibilities), or <i>Research</i> . This field is required if you selected the Report Flag check box.
	This field is for Canadian higher education degree-granting institutions only.
Province	Enter the province that you report to when you perform WCB (Workers' Compensation Board) reporting for this job code. WCB reporting in Canada is always done at the provincial level; there is no national WCB level.
Rate Group	Select a rate group for this job code. Each industry is assigned a rate group for assessment purposes, based on the type of industry and the accident/injury level in that industry in that province.
Classification	Select a WCB classification for this job code. The classification indicates the industry that applies to this job code.

Note. The rate groups and classifications can be obtained from your provincial WCB. The rates and rate codes may vary from province to province.

(DEU) Germany

Medical Surveillance Required	Select if ongoing medical surveillance is required for this job code. For instance, some jobs require workers to be in contact with hazardous materials, and health and safety regulations require that workers receive periodic medical checkups as long as they are in that job.

(GBR) United Kingdom

UK SOC Code (United Kingdom Standard Occupational Classification code)	Enter the appropriate UK Standard Occupational Classification code. This code is required for Northern Ireland Fair Employment reporting.

(ITA) Italy

INAIL Code	Select the job code's INAIL code from the list of options. This code classifies jobs according to the level of risk that is associated with the job and the related insurance that is required by the employer.

(MYS) Malaysia

Festive Advance Pay Program	If you set up one or more festive advance pay programs that each cover all the festive holiday types (using the Festive Advance Pay Program page), associate a default festive advance pay program with a specific job code here. The program details for each festive holiday can be the same or different from each other. One pay program can have many festive holiday types and can be associated with many combinations of earnings elements, deduction elements, and probation periods.

This job code, in conjunction with the ethnic group and religion, are responsible for the defaults on the FA Employee Details (SGP/MYS) page.

(USA) USA

Union Code	If you're defining a job code that is associated with a union, select a union code. Define union codes as a part of the Manage Labor Relations functionality in PeopleSoft Human Resources.
EEO Job Categories	Select a job category. The EEO-1 code is also the Federal Occupation Category (FOC).
Standard Occupational Classif (Standard Occupational Classification)	If your company has operations in Alaska, you can enter a Standard Occupational Classification (SOC) code for use in unemployment insurance reporting. You enter U.S. SOC codes in the U.S. Standard Occupational Classification Table.
EEO Job Group	To further classify the job categories, enter the EEO job group to which this job belongs.
FLSA Status (Fair Labor Standards Act status)	Enter a code to indicate whether this job is exempt or nonexempt according to the FLSA. This value becomes the default for the FLSA status on all employee job records that are associated with this job code. Example values are <i>Administrative</i> , <i>Executive</i> , <i>Nonexempt</i> , and <i>Professional</i> .

(AUS) Australia

ASCO Code (Australian standard classification of occupation code)	Select the ASCO code.
Package Template ID / Package Rule ID	Use these fields to associate this job code with the package rules and templates you set up as part of salary packaging for Australia. These IDs act as defaults for this job in employee salary packaging modeling. These fields are also available on the Position Table; the Position Table fields take precedence over the fields here. By associating templates and rules with job codes, package components are automatically assigned to employees during the package modeling process. Using templates can save time by ensuring that you use the correct template and rule when modeling.

Note. You set up package templates on the Package Template Table page. You set up package rules on the Package Rule Table page.

(AUS) Higher Education

These fields are available when you select the Australian Public Service box on the Country Specific page of the Installation component.

Job Function	Select the default job function for the organization.

Type of Work Performed	Select the default type of work performed for the organization.
Annual Contact Hours	Enter the number of contact hours. This depends on the type of work performed. See “Determining Contact Hours” to calculate this value.
Teaching Weeks	Enter the default number of teaching weeks.
(USF) U.S. Federal	
Bargaining Unit	If the job code is associated with a union, select a bargaining unit.
Pay Basis	Enter the pay basis for which you quote salaries for this job code; for example, <i>Per Annum</i> , <i>Per Hour</i> .
Classification Authority and Classification Factor	The system displays the classification authority and the classification factors that are associated with the classification standard.
Target Grade	Enter the target grade, if applicable.
Factor Level	Enter a classification factor level for each classification factor that is associated with this classification standard.
Points, Grade Points, and Total Points	The system displays the points that are associated with the classification standard.
Weight (%)	The system displays the weight percentage of the points that are associated with the classification standard.
OPM Certification Number (Office of Personnel Management certification number)	Enter the OPM certification number that is associated with this job code.
Position Classification Stds (position classification standards)	Enter the position classification standards that are used.
(BRA) Brazil	
Occupation Code	Enter the appropriate Brazilian Code of Occupation (CBO - Código Brasileiro de Ocupações) from the official table.

Note. Go to www.mte.gov.br to view a list of CBOs.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions”

PeopleSoft 8.8 Human Resources PeopleBook: Administer Festive Advance, “Setting Up Festive Advances for Malaysia and Singapore”

PeopleSoft 8.8 Human Resources PeopleBook: Administer Salary Packaging, “Setting Up Salary Packaging”

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “(AUS) Reporting DETYA for the Australian Higher Education Sector,” Understanding DETYA Calculations and Reference Dates

PeopleSoft Payroll for North America PeopleBook

Assigning Points to Job Evaluation Criteria

Access the Evaluation Criteria page.

Job Code Profile	Evaluation Criteria	Salary Survey	Default Compensation	Non-Base Compensation															
SetID: SHARE		Job Code: 120000																	
Evaluation Criteria Find View All First 1 of 1 Last																			
Description: Administrator Effective Date: 07/03/1996 Status: Active																			
Job Evaluation Criteria		Commitment Accounting																	
	<table border="1"> <thead> <tr> <th></th> <th>Points</th> <th>Percent:</th> </tr> </thead> <tbody> <tr> <td>Knowhow:</td> <td> 0 </td> <td></td> </tr> <tr> <td>Accountability:</td> <td> 0 </td> <td></td> </tr> <tr> <td>Problem-Solving:</td> <td> 0 </td> <td></td> </tr> <tr> <td>Total Points:</td> <td></td> <td></td> </tr> </tbody> </table>		Points	Percent:	Knowhow:	0		Accountability:	0		Problem-Solving:	0		Total Points:			Used by Position Management ☒		
	Points	Percent:																	
Knowhow:	0																		
Accountability:	0																		
Problem-Solving:	0																		
Total Points:																			
France Employee Category: INSEE Code: Job Category Code: Germany Function Code: BA Code: Technical ☐																			

Evaluation Criteria page (1 of 2)

French Public Sector

Job Type
☐ Public ☐ Private ☒ Public / Private

Contract Worker Compensation
 Salary Grade Table Type: Sal Gd Tbl:

☐ Job Outside Coll Lbor Agrment

Regulatory Region:

Labor Agreement:

Election Group:

CS Job Code: Labor Agreement Category:

☐ Auto Hire Validation ☒ Match Competencies

Occupation Code:

Training Program Find | View All First 1 of 1 Last
 Training Program:

Evaluation Criteria page (2 of 2)

Knowhow	Enter points that represent the employee's knowledge required to perform the job.
Accountability	Enter points that represent the employee's ability to do the assigned job.
Problem-Solving	Enter points that represent the employee's ability to work out solutions despite obstacles.
Total Points	You determine the points by comparing each of these factors to every other job in your company. The greater the know-how, accountability, and problem solving for this job, the higher the points. For example, you would probably assign more accountability points to a controller than to a secretary because the controller has more responsibility. The system calculates Total Points and the Percent, or relative importance, of each factor. For example, if Knowhow receives 33.2 percent of the total points, Accountability receives 33.7 percent, and Problem-Solving receives 33.1 percent, then all three factors are almost equally important. However, if Knowhow receives 54.4 percent of the total points, Accountability receives 9.2 percent, and Problem-Solving receives 36.4 percent, then Knowhow is of greater importance than Accountability or Problem-Solving, and Accountability is of little significance.
Used by Position Mgmt? (used by position management?)	Select if this job code is used by a position. If you specified full or partial position management on the Installation Table, this check box is selected by default. A selected check box tells the system that you're budgeting for the job code at the position level. It does not restrict your ability to attach positions to a

job code or attach employees to a job code. If this check box is clear, you can still set up a position with the job code. If the check box is selected, you can still enter the job code on the employee's job data record.

When you clear this check box, the Pre-Encumbrance Indicator and Encumber Salary Option fields appear.

Pre-Encumbrance Indicator

Indicate if you want the system to encumber this job code immediately (*Immediate*), not at all (*None*), or upon requisition (*Requisition*).

Encumber Salary Option

If you are using Commitment Accounting to encumber salaries, the system uses the option that you select to determine the salary amount when it encumbers the salaries of vacant positions.

(FRA) France

Employee Category

Select the employee category for the job code. This code is required for these statutory reports:

- Personal Register
- Annual Survey by Nationality
- French Accident report

INSEE Code

Link this job code to an INSEE code for use in the French Disability report.

Job Category Code

Select a job category code, required for the Single Hiring Statement report.

(DEU) Germany

BA Code (Bundesanstalt fuer Arbeit code)

Select this job code's BA code, if applicable.

Technical

Select if this job code is technical.

Training Program

Training Program

You can associate a training program with this job code, which you'll find helpful in career planning. When you set up training and development programs for employees in this job code, you can use the default training program as the basis for an individual career-training plan.

See Also

Chapter 2, "Using PeopleSoft HRMS," Driving Your System by Employee or Position , page 6

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft 8.8 Human Resources PeopleBook: Administer Training, "Defining Training Courses and Programs"

PeopleSoft 8.8 Human Resources PeopleBook: Plan Careers and Successions, "Planning Careers"

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

Entering Salary Survey Information

Access the Salary Survey page.

Job Code ProfileEvaluation CriteriaSalary SurveyDefault CompensationNon-Base Compensation

SetID: SHAREJob Code: 120000

Salary SurveyFind | View AllFirst1 of 1Last

Description: AdministratorEffective Date: 07/03/1996Status: Active

Salary Survey DetailsCustomize | Find | First1 of 1Last

Job CodeBase RatesTotal Compensation

*Job Code	*Provider	Default	Provider Description	Survey Salary	Currency	Midpoint Rate		
		☐						

Salary Survey page (1 of 3)

Salary Survey DetailsCustomize | Find | First1 of 1Last

Job CodeBase RatesTotal Compensation

*Job Code	*Provider	Default	Mean Base Rate	Median Base Rate		
		☐				

Salary Survey page (2 of 3)

Salary Survey DetailsCustomize | Find | First1 of 1Last

Job CodeBase RatesTotal Compensation

*Job Code	*Provider	Default	Mean Total Compensation	Median Total Compensation		
		☐				

Salary Survey page (3 of 3)

- Job Code

Enter the salary survey job code used by the salary survey providers.
- Provider

Enter the provider of this salary survey.
- Default

Indicate if this salary survey is the default for this job code.
- Salary Survey

Enter the Salary Survey for this job code.
- Midpoint Rate

Enter the compensation midpoint rate for this job code.

Base Rates tab

- Mean Base Rate and Median Base Rate

Enter the mean and median base rates of the surveyed salary.

Total Compensation tab

- Mean Total Compensation and Median Total Compensation

Enter the mean and median total compensation of the surveyed salary.

Associating Salary Plan Information and Base Pay Rate Codes With a Job Code

Access the Default Compensation page.

Job Code Profile | Evaluation Criteria | Salary Survey | **Default Compensation** | Non-Base Compensation

SetID: SHARE Job Code: 120000

Default Compensation Find | View All First 1 of 1 Last

Description: Administrator
Effective Date: 07/03/1996 Status: Active

Job Ratio

Minimum Salary: Midpoint Salary: Maximum Salary: Currency: Frequency:

Sal Plan/Grade/Step

Salary SetID: SHARE Sal Plan/Grade/Step: 0000
Midpoint

Hourly:
Daily:
Monthly:
Annual:

Job Code Base Components Customize | Find First 1 of 1 Last

	*Rate Code	Details	Comp Rate	Currency	*Frequency	Points	Percent	Rate Code Group	Apply FTE
1		Details							☐ + -

Default Compensation page

By associating rate codes with job codes, you define compensation packages that can be associated with a worker's job record on the Job Information page.

Job Ratio

The job ratio calculates comparative salary information for employees who perform similar work activities in countries where plan/grade/step data is used to support industrial tariffs. If you use plan/grade/step data for job-related activities, you do not need to use the Job Ratio fields.

The employee's comp rate (as specified on the Compensation page of the Job Data component) is converted to the currency and frequency defined in the Job Ratio group box. The result is divided by the job code midpoint salary.

Minimum Salary, Midpoint Salary, Maximum Salary, Currency, and Frequency

Enter the minimum, midpoint, and maximum salary amounts according to the frequency (which appears by default from the Job Code Profile page but can be overridden here) that is available to this job code. Indicate the currency of the salary amounts if it is not the same as the default.

Sal Plan/Grade/Step (salary plan/grade/step)

If your company has established compensation programs, select the codes that represent the default salary plan/grade/step for this job. You define these codes in the Salary Plan Table, the Salary Grade Table, and the Salary Step Table.

Salary Administration Plan Select a salary plan (and additional salary planning information) and step. Select a grade. The system populates the rest of the Salary Administration Plan fields on the page with hourly, monthly, and annual midpoint pay rates that are associated with the grade.

The salary administration plan that you enter is used as the employee default if you have not associated salary administration plans with locations in the Location Table.

No matter where the salary administration plan draws its default, when you select job codes for employees on the Job Data pages, the salary grade and step always reflect the values entered here.

See Also

[“PeopleSoft Application Fundamentals for HRMS Preface,” page xxix](#)

PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries, “Setting Up Plan Salaries”

Associating Non-Base Rate Codes With a Job Code

Access the Non-Base Compensation page.

Job Code Profile | Evaluation Criteria | Salary Survey | Default Compensation | **Non-Base Compensation**

SetID: SHARE **Job Code:** 120000

Non-Base Compensation Find | View All First 1 of 1 Last

Description: Administrator **Status:** Active

Effective Date: 07/03/1996

*Rate Code	Details	Comp Rate	Currency	*Frequency	Points	Percent	Rate Code Group	Apply FTE
1	Details							

Non-Base Compensation page

The system doesn't use non-base pay rate codes as default values on any HRMS pages. The codes are used for payroll processing.

Details

Click to review the description, comp rate type (compensation rate type), and rate code class that are associated with the rate code.

Frequency

The system displays the compensation frequency of the rate code as the default frequency. Rate code frequency is defined on the Comp Rate Code Table page.

See [Chapter 8, “Using Frequencies,” page 69](#).

Apply FTE (apply full-time equivalency)

Select to indicate that the compensation rate for this rate code is multiplied by the FTE in calculating the job compensation rate.

Points

The system displays the points that are associated with this rate code, if applicable.

Percent

If the rate code type for this rate code is *Percent*, the system displays the percent that is to be applied to the job compensation rate or to a rate code group.

Note. Column order for grids may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar as necessary to view all the columns.

Defining Job Tasks and Responsibilities

Define job task codes, such as *Data Entry*, and assign it to a Job Code on the Job Code Task Table. On the Job Code Task Table, indicate the importance and frequency of the task.

Pages Used to Define Job Tasks and Responsibilities

Page Name	Object Name	Navigation	Usage
Job Task Table	JOB_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Task Table	Define job task outcomes. For example, if a job requires an employee to pick up heavy boxes and move them, then define moving heavy boxes as the essential job task. Because an employee with a disability could use a forklift to move them, do not define the job task as <i>lifting</i> heavy boxes.
Job Code Task Table	JOBCODE_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Task Table	Define job tasks associated with each job code.
Responsibilities	EP_RESP_TBL	Set Up HRMS, Foundation Tables, Job Attributes, Responsibilities	Define job responsibility codes.

Defining Job Task Codes

Access the Job Code Task Table page.

Job Code Task Table

SetID: SHARE **Job Code:** 140035 Analyst-Financial

Location SetID: SHARE **Location Code:** KCQC00 Montreal Office

Job Code Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980 **Total Percent Time Spent:** 100.00

Detail Customize | Find | View All First 1-2 of 2 Last

	*Jobtask SetID	Job Task	Descr	*Imprtce	*Freq	*Cons.	% Time Spent		
1	SHARE	K00010	Data Conversion	Esse	Wee	Quite E	60.00	+	-
2	SHARE	K00037	System Design	Margi	Dail	Very Mi	40.00	+	-

Job Code Task Table page

Jobtask SetID

Select from the drop-down list box. Valid values are stored on the TableSet ID page.

Job Task

Select from the drop-down list box. Valid values are stored on the Job Task Table page.

Importance

Select the importance of the job task to the particular job code. Valid values are in the Translate Table.

Frequency

Enter how often the job task occurs for each job code. Valid values are in the Frequency Table.

Consequence

Select the result that occurs if the job task isn't performed. Valid values are in the Translate Table.

% Time Spnt (percentage time spent)

Enter the percentage of time that is spent on the job task.

Total Percent Time Spent

The system calculates and displays this when you move out of the % Time Spent field. The total cannot exceed 100%.

Note. Once created, this information is particularly useful for discussing job requirements with applicants. Although the ADA prohibits you from asking applicants if they have disabilities, you can show them a job's task list and ask them if they might have difficulties in completing the tasks. This way, you offer the applicants the opportunity to describe their disabilities and any accommodations that they need to perform the job tasks.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(GBR) (USA) (USF) Meeting Disability Regulatory Requirements,” Managing Accommodation Data

Maintaining Pay Groups

This section provides an overview and discusses how to:

- Set up and describe pay groups.
- Specify process controls for a pay group.
- Define payroll calculation parameters for pay groups.
- (USA) Define FLSA periods.
- (E&G) Enter additional E&G earnings codes.

Understanding Pay Group Setup

When you implement PeopleSoft HRMS, particularly PeopleSoft Payroll for North America or PeopleSoft Global Payroll, one of your major tasks is to set up pay groups. For example, you might create different pay groups for employees with different sets of benefits or earnings.

While this information may seem specific to payroll processing, with PeopleSoft Payroll for North America or your own system, you also need it for PeopleSoft Human Resources, to set up job records and benefit programs. Many of the default field values on the Administer Workforce pages are based on the pay group values that you specify in this table. Set up at least one pay group for each company that you established in the Company Table (or the Agency Table, for U.S. federal users).

See [Chapter 11, “Setting Up Organization Foundation Tables,” Entering Company Information](#), page 152.

See [Chapter 11, “Setting Up Organization Foundation Tables,” \(USF\) Entering Agency Information](#), page 173.

Setting Up Your Pay Group

Where you set up your pay group depends on which payroll application you use:

- If you aren’t using a PeopleSoft payroll application at all, use the Pay Group Table discussed in this section.
- If you use PeopleSoft Payroll for North America, use the Pay Group Table pages discussed in this section as well as additional pages of the Pay Group Table that are documented in the PeopleSoft Payroll for North America PeopleBook.

See *PeopleSoft 8.8 Payroll for North America PeopleBook*, “Setting Up Pay Groups”.

- If you use PeopleSoft Global Payroll, use the Pay Group component in that application.

See *PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining the Organizational Structure,” Defining Pay Groups.

If you use PeopleSoft Pension Administration, also set up pay groups for your pension payee companies. PeopleSoft Pension Administration doesn’t use pay groups for paying pension benefits.

See *PeopleSoft Pension Administration PeopleBook*

Note. If you use both PeopleSoft Global Payroll and PeopleSoft Payroll for North America, set up both types of pay groups. Otherwise, define only the pay groups for the application that you use.

Using the Pay Group Table

The Pay Group Table consists of nine pages. For PeopleSoft Human Resources, enter information only on the first three pages of the Pay Group Table, because that information is used across all applications of PeopleSoft HRMS. The last six pages in the page group are only for PeopleSoft Payroll for North America.

Pages Used to Maintain Pay Groups

Note. Additional pages of the Pay Group table are documented in the *PeopleSoft Payroll for North America PeopleBook*. The pages listed below are also documented in the *PeopleSoft Human Resources: Administer Salaries for the Netherlands PeopleBook*.

Page Name	Object Name	Navigation	Usage
Definition	PAYGROUP_TABLE1	- Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Pay Group Table - Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Pay Group Table	Set up and describe pay groups.
Process Control	PAYGROUP_TABLE2	- Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Pay Group Table - Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Pay Group Table	Establish employee type options for a particular pay group.
Calc Parameters (calculation parameters)	PAYGROUP_TBL3	- Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Pay Group Table - Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Pay Group Table	Define further payroll processing parameters for pay groups.
FLSA Period Definition	FLSA_PERIOD_SBPNL	Click FLSA Period Definition on the Calc Parameters page.	(USF) Define FLSA periods for the pay group.
Education and Government Additional Earnings Codes		Click Addl Educ/Govt Earnings Codes on the Calc Parameters page.	Add earnings codes for education and government.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Setting Up Pay Groups”

PeopleSoft 8.8 Human Resources PeopleBook: Administer Salaries for The Netherlands, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Creating and Maintaining Pay Groups

Setting Up and Describing Pay Groups

Access the Definition page.

Note. This page is not required for USF users.

The screenshot shows the 'Definition' tab of the Pay Group setup page. At the top, the company is 'FRG' (Federal Reserve Board) and the pay group is 'F09'. The 'Pay Group Information' section contains several fields: '*Effective Date' is 01/01/1980, '*Status' is Active, '*SetID' is FEDPS, '*Description' is FLSA Exempt Overtime, '*Short Description' is FLSAOTime, '*Country' is USA, '*Currency' is empty, and '*Employee Type Default' is Salaried. There is a checkbox for 'Retiree Pay Group' which is unchecked. To the right, there are fields for 'PI Configuration ID' and 'Deduction Priority'. A 'Frequency' section has three options: '*Pay' (Biweekly), '*Daily' (Daily), and '*Monthly' (Monthly). At the bottom left, a 'GL Use' section has 'Rate Type' (OFFIC) and 'Conv Date' (C).

Definition page

Pay Group

The Pay Group value that you specified in the entry dialog box is displayed.

Note. On employee job records, the Pay Group default is from the company level.

SetID

Select a setID for the shift table used by the employees in this pay group. For pay groups that don't use a shift table, use a generic setID.

Retiree Pay Group

Select for a separate retiree pay group. PeopleSoft recommends keeping retirees in their own pay group. There is no processing associated with this check box.

PI Configuration ID (payroll interface configuration ID)

If appropriate, select a payroll interface configuration ID. The PI Configuration ID is used by the PeopleSoft Payroll Interface application.

Deduction Priority

Enter a deduction priority number for your pay group. The deduction priority is used for multiple job employees when the single check option is not selected for a company.

Employee Type Default

Select the most common employee type within the pay group. The system uses this value as the default for the pay group's employee job records. The default you enter on this page is edited against the Benefit Program table. You need either to set up that table first or leave this field blank for now. Values are as follows:

- *Salaried*: Select for employees whose earnings are based on an amount per pay period, rather than accumulated hours. You can still enter exceptions on the pay sheets.
- *Hourly*: Select for employees who don't work the same number of hours each pay period. Typically, an hourly employee requires positive time reporting. In this case, you enter the hours worked on the pay sheets.
- *Exep Hrly* (hourly exceptions): Select for employees who work a set number of hours each pay period. Enter only exceptions to their schedule on the pay sheets.
- *Not Appl* (not applicable): Select if this field isn't applicable.

(CAN) Wage Loss Plan Default

Specify a wage loss plan default value for the pay group. This default value assigns employees the appropriate wage loss plan on the Canadian Income Tax Data page whenever the system automatically creates employee tax data records.

Frequency**Daily**

Select the frequency used by PeopleSoft Human Resources to calculate the daily rate in the Job Data component. Only frequencies on the Frequency Table with a frequency type of daily are available for selection.

Monthly

Select the frequency to calculate a monthly rate, used by PeopleSoft Human Resources and Payroll for North America. Only frequencies on the Frequency Table with a frequency type of monthly are available for selection.

General Ledger Use

PeopleSoft General Ledger uses these fields.

Rate Type

Select the appropriate value from the list provided.

Conv Date (conversion date) Values are *Check Date*, *Pay End Date*, and *Today's Date*.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, "Defining Deductions," Setting Up Deductions

Specifying Process Controls for a Pay Group

Access the Process Control page.

Definition		Process Control		Calc Parameters	
Company:	FRG	Federal Reserve Board			
Pay Group:	F09	FLSA Exempt Overtime			
Pay Group Information Find First 1 of 1 Last					
Effective Date:		01/01/1980		Status: Active + -	
Continue With Errors			Processing Control		
☐ Continue With Errors Error Pay End Date Option: None			Industry: Government Industry Sector: US Federal		
Employee Type(s) for Pay Group Find View All First 1 of 3 Last					
*Employee Type: Excep Hrly + -					
☒ Print Paysheets ☐ Confirmation Required for Job Earnings on Paysheet ☐ Confirmation Required for Partial Pay Period on Paysheet					

Process Control page

You establish options on this page before you assign employee types on employee records. For example, you might want to group only salaried employees in your monthly pay group and group hourly and exception hourly employees in a biweekly pay group.

Continue With Errors

Continue With Errors

Select to enable the Pay Confirmation process to continue processing even if it encounters calculation errors. The system moves the items in error to off-cycle paysheets to be corrected in a separate off-cycle run.

Error Pay End Date Option

This value is used by the Pay Calendar build process to set up the pay calendar. Select the date of the off-cycle calendar to which erred paysheets are moved.

If you select *Next Day*, the Pay Calendar Creation process creates one cycle pay calendar for each on-cycle pay calendar that is created. The pay end date for the off-cycle calendar is one day after the pay end date for the on-cycle pay calendar. For example, if the pay end date for the on-cycle calendar is May 31st, the pay end date for the off-cycle calendar is June 1st.

Warning! If you enter your own end date, you must ensure that a pay calendar has been built for that date before attempting to calculate transferred pay lines.

Processing Control

Industry Sector

Select *None*, *Core*, *Public Sct* (public sector), or *US Federal*.

Employee Type(s) for Paygroup

Employee Type

Select the options—*Hourly*, *Exception Hourly*, or *Salaried*—that are valid for this pay group. If you use PeopleSoft Payroll for North America, you also need to designate payroll processing parameters. Otherwise, for employees being paid with PeopleSoft Payroll for North America, leave Print Paysheets selected as the default.

Note. If a specific employee type is not defined on a pay group, a user can't set up that type of employee. For example, if a pay group does not have an employee type of salaried, when an employee is hired, the user can't enter S as the employee type on job.

Print Paysheets

If you are using PeopleSoft Payroll for North America, select this check box if the employees in this employee type should always be included when printing paysheets. Employee types for which this check box is cleared still appear on the paysheet pages.

Note. You must check this box if either of the confirmation required check boxes is selected.

Confirmation Required for Job Earnings on Paysheet

If you are using PeopleSoft Payroll for North America, select this box to clear the OK to Pay field on the paysheets by default. OK to Pay tells the system whether to pay an employee or place the record on hold until you review it. Pay Calculation, in turn, processes only those employees who have OK to Pay selected. If you select this option, Print Paysheets must also be selected.

Typically, hourly employees require some sort of positive time input to get paid. For this reason, you might say that confirmation is required. Once you enter their time on the paysheets, you manually select OK to Pay to permit them to be paid.

For exception hourly and salaried employees, you usually enter exception time only as required. Therefore, you might indicate that confirmation is not required. These employees automatically get paid their regular salary or hours each pay cycle, because the paysheets are created with the OK to Pay check box selected.

Confirmation Required for Partial Pay Period on Paysheet

If you are using PeopleSoft Payroll for North America, select this box to control the OK to Pay check box on the paysheet. Whenever there is a mid-period change on the Job record—an employee is hired, is terminated, or changed jobs or pay rates—the system creates partial pay period records due to proration. Typically, if you prorate pay, you should clear this check box to tell the system that confirmation is not required and to select OK to Pay on the paysheet. If, on the other hand, you want to manually verify the proration for employees, select this option. You can adjust the pay on the paysheets and click the OK to Pay check box. If you select this option, Print Paysheets must also be selected.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Working With Paysheets”

Defining Payroll Calculation Parameters for Pay Groups

Access the Pay Group Table - Calc Parameters page.

Definition **Process Control** **Calc Parameters**

Company: FRG Federal Reserve Board
Pay Group: F09 FLSA Exempt Overtime

Pay Group Information Find First 1 of 1 Last

Effective Date: 01/01/1980 **Status:** Active

Earnings Program ID: GS General Schedule **Pay Plan:** GS General Schedule

Holiday Schedule: FHL FED Holiday Schedule

Earnings

*Regular Hours: FRG *Regular Earnings: FRG

*Overtime Hours: FOV *Holiday: FHL

Addl Educ/Govt Earnings Codes

Default Benefit Program: F02

Retro Pay Program ID:

Final Check Program ID:

☒ **FLSA Required** **FLSA Period Definition**

US Federal

Nonpay Hours:

Refund Earnings Code:

Interest Earnings Code:

Pay Group Table - Calc Parameters page (1 of 2)

Pay Group Information

Earnings Program ID Select a default value for the employee records in this pay group.

(USF) Pay Plan Select the pay plan to assign to this pay group.

Holiday Schedule Select the holiday schedule for the pay group. The system uses the holiday schedule you specify on this page as the default for the employee's job record. The default you enter on this page is edited against the Holiday Schedule Table under Set Up HRMS, Common Definitions. You must set up that table first or leave this field blank for now.

Default Benefit Program Select the default benefit/deduction program for the pay group. The system uses this default benefit/deduction program as the default for the employee's job record. The default you enter on this page is edited against the Benefit/Deduction Program Table in the Benefits menu. You must set up that table first, or leave this field blank for now.

Retro Pay Program ID Select a retro pay program ID to assign the pay group to a retro pay program. Specify a retro pay program ID that identifies the earnings codes used in retro pay calculations.

Note. You define Retro Pay Programs on the Retro Pay Program Table and earnings codes on the Earnings Tables. In each Retro Pay Program you define, you can specify any number of earnings codes as earnings for which Retro Pay can be calculated. For each of these earnings codes, you can specify an earnings code to be used for paying the Retro Pay earnings.

Final Check Program ID

To specify a default final check program for the pay group, select the final check program ID that identifies the earnings, deductions, and accruals to be used in final check processing for the pay group.

(USA) FLSA Required

Select this check box if FLSA regulations are to be applied to this pay group. When you select this check box, the *FLSA Period Definition* button appears. If you do not select this check box, the button does not appear and you cannot define FLSA pay periods.

FLSA is for U.S. Payroll only; this check box appears on the page if you have enabled FLSA processing on the Fica/Tax Details page (access through the Company Table – Default Settings page) and on every pay group when applicable.

Note. If FLSA is not selected for a company, it cannot be selected for a pay group within that company. After it has been selected at the company level, it does not have to be selected at the pay group level. However, if FLSA is required for a pay group, it must be selected at both the company and pay group levels.

Note. (USF) If FLSA is required for a whole agency or for most pay groups in an agency, you should clear the *FLSA Required* check box and define FLSA requirements on the Agency Table. Remember that if the *FLSA Required* check box isn't selected on the Agency Table, the FLSA Rule for a pay group is set by default to *Higher of FLSA Contractual*.

Note. To be included in FLSA calculation, an employee must have non-exempt status and belong to an FLSA pay group.

(USA) FLSA Period Definition

Click to access the FLSA Period Definition page.

Earnings

Use this group box to define earnings codes for each earnings type.

Regular Hours

Select the appropriate earnings code for the regular hours earnings type.

Overtime Hours (overtime hours earnings type)

Select the appropriate earnings code for the overtime hours earnings type.

Regular Earnings

Select the appropriate earnings code for the regular earnings type.

Holiday

When the system creates paysheets and detects that a holiday falls within the pay period, it uses the earnings code associated with this field. If Holiday Type on the Holiday Schedule Table is Canadian, the system uses this earnings code to set up the statutory holiday earnings on the paysheet.

Addl Educ/Govt Earnings Codes

Click this button to access the Education and Government Additional Earnings Codes page.

US Federal

Select the appropriate earnings code for Nonpay hours, Refund, and Interest.

See *PeopleSoft 8.8 Payroll for North America PeopleBook*, “Processing Retro Pay,” (USF) Managing Interest Calculations on Retro Pay.

(USA) Specifying the FLSA Period Definition

Access the FLSA Period Definition page.

FLSA Period Subpanel

FLSA Period Definition: Fixed FLSA Period

FLSA Salaried Hours Used

☐ Fixed Salaried Hours

☒ Unspecified Salaried Hours

FLSA Calendar ID: 

FLSA Period in Days:

FLSA Period Definition page

The FLSA Period Definition page changes, depending on which options you select. The following table shows which fields are visible on the page, depending on the FLSA Period Definition you select:

FLSA Period Definition	FLSA Salaried HRS Use: Unspecified or Fixed	Use Basic Formula	FLSA Calendar ID	FLSA Period in Days	FLSA Threshold Hours
<i>Fixed FLSA Period</i> with Fixed Salaried Hrs selected and Use Basic Formula clear	X	X	X	X	
<i>Fixed FLSA Period</i> with Fixed Salaried Hrs selected and Use Basic Formula clear	X	X			
<i>Fixed FLSA Period</i> with Unspecified Salaried Hrs selected	X		X	X	
<i>Law Enforcement</i>			X	X	X
<i>Fire Protection</i>			X	X	X

FLSA Period Definition

Select the appropriate FLSA period definition:

- *Fixed FLSA Period*: 7 or 14 days. 7 is the default.
- *Fire Protection*: 7 to 28 days.
- *Law Enforcement*: 7 to 28 days.

If you select *Fixed FLSA Period*, the period can only be for 7 or 14 days. There are no FLSA Threshold Hours for employees in the *Fixed FLSA Period*, because threshold hours only apply to law enforcement and fire protection employees.

FLSA Salaried Hours Used**Fixed Salaried Hours (Hours per Week)**

Select this option to use the standard hours you entered on the employee's Job record. If you select this option, the *Use Basic Formula* check box appears.

Use Basic Formula

If you select this check box, the *FLSA Calendar ID* and *FLSA Period in Days* check boxes disappear. Basic formulas are used only for monthly

and semi-monthly pay periods. The FLSA period is assumed to be the same as the Pay Calendar period; hence, no FLSA Calendar ID is required. If you select this check box, you must enter information into the Work Day Hours field on the Job Information page.

Unspecified Salaried Hours	Select this option to use the actual number of hours worked per week by salaried employees to determine their FLSA rate.
FLSA Calendar ID	Select a FLSA calendar ID. The FLSA calendar ID is linked to the FLSA Start Date and FLSA Period in Days fields on the FLSA Calendar Table page, which are used to define the FLSA begin and end dates. Hence, the pay group uses the FLSA Calendar ID to define the FLSA periods. This field is not applicable if you select <i>Basic Rate Formula</i> . If you select <i>Fixed FLSA Period</i> , the prompt list contains only FLSA Calendar IDs with 7 or 14 FLSA Periods in Days. For Fire Protection or Law Enforcement, the prompt list contains FLSA Calendar IDs from 7 to 28 days.
FLSA Period in Days	The length of the FLSA pay period, or the days from the FLSA Begin Date to the FLSA End Date. The system displays it automatically. It is based on the FLSA Period in Days you define on the FLSA Calendar Table. This field is display-only.
FLSA Threshold Hours	The number of hours worked before the FLSA rate applies to Fire Protection and Law Enforcement <i>employees</i> . Both of these types of jobs have different threshold hours defined by FLSA regulations. Both threshold hour schedules are delivered by PeopleSoft and are defined in FLSA Period Table.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USA) Setting Up and Calculating FLSA Rates”

(E&G) Entering Additional E&G Earnings Codes

Access the Education and Government Additional Earnings Codes page.

Select the appropriate earnings code for each field.

Running Job Code and Pay Group Reports

This section explains how to run reports of the job codes and pay groups you have defined.

Pages Used to Run Job Code and Pay Group Reports

Page Name	Object Name	Navigation	Usage
Pay Group Report	PRCSRUNCNTL	Set Up HRMS, Product Related, Payroll Interface, Reports, Pay Group Table	The Pay Group report (PAY711) prints each pay group and the processing characteristics that apply to that group.
Run Control	PRCSRUNCNTL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table Report	Job Code Table report (PER709C) lists all job codes.

CHAPTER 14

(USF) Setting Up Human Resources Management Tables

This section discusses the setup of control tables that are specific to federal agencies and tells you how to set up HRMS control tables specific to Federal needs and view PeopleSoft Project Costing and PeopleSoft General Ledger business units.

Setting Up Federal HRMS Control Tables

When creating personnel action requests, you search fields using information from the Legal Authority Table, the Nature of Action Table, the PAR Remarks Table, and the NOA/Legal Authority 1 Table.

When you enter employee-specific information, you use values from the Handicap and the LEO Pay Area Table.

In PeopleSoft HRMS, you use values from the U.S. County Table, the Personnel Office ID Table, and the Sub-Agency Table.

Pages Used to Set Up Federal HRMS Control Tables

Page Name	Object Name	Navigation	Usage
Handicap Table	GVT_HANDICAP_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Handicap Table	Assign codes to the types of disabilities an applicant or employee might have. You can set up the table with the disabilities that your agency is likely to use and add more as needed.
Legal Authority Table	GVT_LEGAL_AUTH_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Legal Authority	The Legal Authority Table provides the values that are used on the Data Control pages for Personnel Action Request (PAR) processing.
U.S. County Table	GVT_COUNTY_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, U.S. County	Contains a complete list of counties in the United States. This table populates the County description on the Location Table. PeopleSoft delivers the list of U.S. counties, but you can add or change an entry if needed.

Page Name	Object Name	Navigation	Usage
Nature of Action Table	GVT_NOAC_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Nature of Action Table	Review, add, and update codes. This table defines the Nature of Action codes that are used in PeopleSoft Human Resources. Every Personnel Action Request (PAR) requires a Nature of Action (NOA) code, so every personnel action is described in this table and assigned an NOA code. PeopleSoft delivers the NOA codes, but you can add or update entries as needed. When entering NOA codes for your agency's internal use, PeopleSoft suggests that you use codes in the 900 series.
LEO Pay Area Table	GVT_LEOAREA_TABLE	Set Up HRMS, Product Related, Compensation, LEO Pay Area USF	Set up special pay areas in the LEO Pay Area Table. Law enforcement officers in these regions receive additional pay above the base pay for their pay plan, grade, and step. PeopleSoft delivers the current LEO pay areas, and you can update them based on Office of Personnel Management updates that you might receive throughout the year.
NOA/Legal Authority 1 Table	GVT_AUTH_VAL_1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NOA/Legal Authority 1	Connect the NOA codes that are defined in the Nature of Action Table with the Legal Authorities that are defined in the Legal Authority Table. You must have set up Nature of Action codes and Legal Authority codes.
Personnel Office ID Table	GVT_POI_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID	Assign an identification number to every personnel office in your agency. Much of the information that you enter is printed on the personnel action requests.
PAR Approving Officials Table	GVT_POI_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Office ID	Enter the names that appear in the routing process section of the PAR.

Page Name	Object Name	Navigation	Usage
PAR Remarks Table	GVT_SF50_RK_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Personnel Action Rqst Rmks	Define standardized remarks to attach to PARs. You use some remarks exactly as they are entered here, but you insert employee-specific information into other remarks when you attach the remark at the employee level.
Sub-Agency Table	GVT_SUBAGCY_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Sub-Agency	Set up sub-agencies. If your agency has multiple organizations that might report to the Office of Personnel Management as separate entities, you define them as distinct sub-agencies for online processing purposes.

Setting Up Disability Codes

Access the Handicap Table page.

Handicap Table

Disability Code: 15 Hard of Hearing

Handicap Table				Customize Find View All	First 1 of 1 Last
	*Effective Date	*Status	Disabled	*Description	
1	01/01/1900	Active	☒	Hard of Hearing	+ -

Handicap Table page

Disabled

Select if the disability code describes what your agency considers a disability. Usually you select this check box. However, if (for example) you set up a disability code to indicate that an applicant or employee has no disability, leave this check box cleared.

Setting Up Legal Authority Codes

Access the Legal Authority Table page.

Legal Authority Table						
Legal Authority Code: ABR						
Legal Authority						
Customize Find View All First 1-3 of 3 Last						
	Effective Date	Status	Description - Part 1	Description - Part 2		
1	03/01/2000	Active	Reg. 330.608. Agency	Career Transition Program	+	-
2	04/16/1996	Active	Reg. 330.608		+	-
3	03/01/1996	Active	Reg. 330.608		+	-

Legal Authority Table page

A *legal authority* is the authority that empowers an agency to grant a personnel action request. PeopleSoft delivers your system with a list of legal authorities. If the Office of Personnel Management issues an update of legal authorities, you can keep your system up to date by changing the information in the Legal Authority Table.

When you add a legal authority code to this table, select an effective date early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.

Enter a Description - Part 1 and a Description Part - 2. These descriptions appear on the Data Control pages when you process personnel actions for applicants or employees.

Setting Up Nature of Action Codes

Access the Nature of Action Table page.

Nature of Action Table	
Action:	ADL Additional Job
Nature of Action Code:	141
NOA Description	
Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980 *Status: Active
*Description - Part 1:	Reins-Career-Cond
Description - Part 2:	
Time NOA is Effective:	Opening of Business Day
☒ Required for CPDF ☒ Push Action to Job ☒ IRR Reportable	
IRR Type:	Not Applicable

Nature of Action Table page

Nature of Action Code

When you add a Nature of Action code to this table, select an effective date that is early enough to accommodate your organization's oldest historical record to which it applies. Add data rows to maintain history data for information that changes over time.

Time NOA is Effective (time nature of action is effective)

This field designates when the personnel action should take effect. Select *Opening of Business Day* (the default) or *Close of Business Day*.

If you select *(none)*, the system uses the default, *Opening of Business Day*.

In PeopleSoft, all actions are normally assumed to take place at the beginning of business on the effective date. This isn't always the case with the federal government. With *Termination/Non-Pay* actions (NOAs that are in the 300 series and 400 series), the action is effective at *Close Of Business Day* on the effective date.

Required for CPDF (required for central personnel data file)

Select if the NOA code is reportable to the Office of Personnel Management (OPM) from CPDF reports.

Push Action to Job

Select if the nature of action is to be applied to the core PeopleSoft Job record from the federal government side after saving the personnel action.

IRR Reportable (individual retirement record reportable)

Select if an NOA code is to be reported to OPM on the IRR. This indicates that an IRR-related NOA code is part of an IRR control record when a separation personnel action is saved.

IRR Type

Select the type of IRR to be generated. Values are *Retirement*, *Transfer/Resignation*, and *Supplemental*.

Setting Up LEO Pay Areas

Access the LEO Pay Area Table page.

LEO Pay Area Table						
LEO Special Pay Area: 1 Boston-Worcester-Lawrence						
LEO Pay & Area Table Customize Find View All First 1-2 of 2 Last						
	*Effective Date		*Status as of Effective Date	*Description	LEO Percentage	
1	10/16/1992		Active	Boston-Worcester-Lawrence	16.00	+ -
2	01/01/1900		Active	Boston-Worcester-Lawrence	0.00	+ -

LEO Pay Area Table page

LEO Percentage (law enforcement officer percentage)

Enter the percentage of base pay that LEOs in this region receive in addition to the base pay set by their pay plan, grade, and step. The amount is reflected on the Compensation Data page in Administer Workforce.

Associating Nature of Action Codes with Legal Authority Codes

Access the NOA/Legal Authority 1 Table page.

When you enter an NOA (nature of action) code on the PAR Data Control (personnel action request data control) page in Administer Workforce and prompt on the Authority (1) field, you see only the valid values from this table. However, for Authority (2), you can select any of the legal authorities that are defined in the Legal Authority Table.

Setting Up Personnel Office IDs

Access the Personnel Office ID Table page.

Personnel Office ID Table | PAR Approving Officials Table

Personnel Office ID: 7444

PAR Approving Officials Find | View All First 1 of 1 Last

*Effective Date: 07/28/2001 *Status: Active

*Company: FRG *Sub-Agency: ZZ Internal Research Depart-NR

*Description: Commitment Act TL

Personnel Officer's Name: OPM Oversight Office

Address: Automated Submitting Point

Postal Code: Telephone:

Electronic Commerce Address:

SetID: FEDPS

Location Code: F0001 Washington DC USA

Personnel Office ID Table page

Sub-Agency Select the sub-agency code.

Personnel Officer's Name Enter the name of the person who is responsible for personnel actions for this office.

OPM Oversight Office (Office of Personnel Management Oversight Office) Select the OPM Oversight Office to which you report personnel actions from the available values. The values are stored on the Translate table. To change or add values, inform your project management office of the updates you require.

Electronic Commerce Address This address is for your agency's information only. For example, this might be an email address or a government network ID.

Automated Submitting Point The automated submitting point is an informational field and isn't used during PeopleSoft HRMS processing. However, it is required on the OPM form that is used to communicate the establishment of or changes to a Personnel Office Identifier for currently operating personnel offices.

Specifying PAR Approving Officials

Access the PAR Approving Officials Table page.

Personnel Office ID Table | PAR Approving Officials Table

Scroll Area Find | View All | First 1 of 1 Last +

Personnel Office ID: 7444 Effective Date: 07/28/2001 Status: Active +

*EmplID	Empl Rcd#	*Name	Primary PAR Approving Offcl	*Title
1	0		☐	

Customize | Find | View All | First 1 of 1 Last + -

PAR Approving Officials Table page

EmplID (employee ID) Enter an employee ID for each official who approves personnel actions. When you move out of the field, the system populates the *Empl Rcd#*, *Name*, and *Title* fields. You can edit these fields.

Primary PAR Approving Offcl (primary personnel action request approving official) Select if applicable. This check box is for your information only.

Setting Up PAR Remarks

Access the PAR Remarks Table page.

PAR Remarks Table page

The Office of Personnel Management (OPM) designates remark codes that begin with *A* through *X*. PeopleSoft delivers the current standard OPM PAR remarks, but you need to maintain them, based on OPM updates that you might receive throughout the year. To enter additional remarks for your agency's internal use, use codes that begin with *Y* or *Z*. When you upgrade PeopleSoft HRMS, retain your agency-specific remarks.

Insertion Required

Select if this remark needs employee-specific information. When you select this remark at the employee level, this check box is unavailable for entry.

PeopleSoft uses an asterisk (*) to denote employee-specific information that is changed by your human resources personnel clerk when the remark is attached to a PAR at the employee level.

IRR Reportable (individual retirement record reportable)

Select if this remark is attached to a PAR that is to be printed on an IRR and you want to print the remark on the IRR.

ROST Reportable (Register of Separations and Transfers reportable)

Select to have this remark printed on the ROST.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USF) Generating IRR and ROST Reports”

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USF) Generating IRR and ROST Reports,” Processing the Register of Separations and Transfers (ROST)

Setting Up Sub-Agencies

Access the Sub-Agency Table page.

Report CPDF (report central personnel data files)

Select if this sub-agency reports CPDF on a regular basis. This check box is informational only.

Long	Enter a long description of the sub-agency.
Abbreviation	Enter an abbreviated description of the sub-agency.

Running Federal HRMS Setup Reports

This section explains how to generate reports of the setup tables for U.S. Federal HRMS installations.

Pages Used to Run the Federal HRMS Setup Reports

Page Name	Object Name	Navigation	Usage
Run Control	PRCSRUNCNTL	- Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Sub-Agency Table - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Personnel Office ID Table - Set Up HRMS, Product Related, Compensation, LEO Pay Area Rpt USF - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Handicap Table - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Legal Authority Table - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Nature of Action Table - Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, NOA/Authority 1	Use this page to run these reports: - Sub-Agency Table report (FGPER804) prints all sub-agencies in the Sub-Agency Table and their associated agencies. - Personnel Office ID Table report (FGPER805) prints information about all Personnel Offices in your agency. - LEO Pay Area Table report (FGPER808) lists each LEO Special Pay Area and associated percentage. - Handicap Table report (FGPER811) prints all disabilities and their associated codes. - Legal Authority Table report (FGPER812) prints information about the legal authorities you set up in the Legal Authority table. - Nature of Action Table report (FGPER813) generates a list of the codes in the Nature of Action Table. - NOA Authority 1 report (FGPER814) generates a list of the information in the Nature of Action/Authority 1 Table.

Viewing the Project Costing and General Ledger Business Unit Tables

The PC (project costing) Business Unit Table and GL (General Ledger) Business Unit Table are view-only pages. The PC Business Unit Table is part of the Project Costing process in PeopleSoft Financials, which interacts with the Time and Labor process. If you don't use project costing, you don't need to import the values for this table. The GL Business Unit Table is part of the General Ledger process in PeopleSoft Financials that interacts with the Payroll process. If you don't use General Ledger, you don't need to import the values for this table.

Note. For more information about the PC Business Unit Table, see your PeopleSoft Time and Labor documentation.

For more information about the GL Business Unit Table, see your PeopleSoft General Ledger documentation.

CHAPTER 15

Setting Up Banks and Bank Branches

This chapter provides an overview of setting up banks and bank branches and tells you how to:

- Set up banks and bank branches.
- Specify the source banks.

Understanding Bank and Bank Branch Setup

You must complete the Bank Table page before you identify a bank with a source bank account.

To set up banks that PeopleSoft HRMS deals with:

1. Set up the bank on the Bank Table page.
2. Specify any bank branches on the Bank/Branch Table page.

UK customers should refer to (GBR) Setting Up UK Banks and Building Societies for instructions on using the Bank/Branch Info component.

See [Chapter 15, “Setting Up Banks and Bank Branches,” \(GBR\) Setting Up UK Banks and Building Societies](#), page 271.

3. Specify the source banks for processes such as payroll, using the Source Bank Accounts page.

Understanding Enterprise Integration Points

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

See Also

PeopleSoft Enterprise Integration PeopleBook

Setting Up Banks and Bank Branches

This section discusses how to:

- Identify banks.

- Define bank branches.
- (GBR) Set up UK banks and building societies.

Pages Used to Set Up Banks and Bank Branches

Page Name	Object Name	Navigation	Usage
Bank Table	BANK_EC	Set Up HRMS, Common Definitions, Banking, Banks	Set up basic information for all financial institutions. You must complete the Bank Table page before you identify a bank with a source bank account.
Branch Table	BANK_BRANCH_EC	Set Up HRMS, Common Definitions, Banking, Banks	Define a bank's branches. Not all countries require bank branch information.
Bank Branch Address	BANK_BRA_ADR_SP	Click the Address Information button on the Branch Table page.	Enter the address for a bank branch.

Identifying Banks

Access the Bank Table page.

Bank Table

Branch Table

Country Code:

AUS

Australia

Bank ID:

CTI

Bank Type:

Commercial

Alt. Bank ID:

*Bank Name:

Citibank Limited

Short Desc:

Citibank

Country:

AUS

Australia

Address:

Sydney, NSW,

[Edit Address](#)

Phone:

AC Bank Name:

Bank Table page

Bank ID

System-displayed. There are different formats for each country. Some are numeric, and others are alphanumeric.

Bank Type	Select the type of bank. Values are <i>Commercial</i> , <i>Community</i> , <i>General</i> , <i>Post Bank</i> , and <i>Savings</i> .
Alt. Bank ID (alternate bank ID)	Enter the bank's national ID, if applicable. If the bank participates in an international banking consortium or system, it is given an alternate bank ID that is used in international transactions.
AC Bank Name (alternate character bank name)	This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank name in single-byte, Katakana format.

(GBR) Special Considerations for UK Customers

UK customers who are setting up UK bank branches enter the following information:

Country Code	Enter <i>GBR</i> .
Bank ID	Enter the sort code for the bank branch.
	Note. If you're setting up a building society, enter the sort code of the bank branch that handles clearing for the building society. Clearing is normally handled by a bank's head office.
Bank Type	Optional for UK banks.
Alt. Bank ID (alternate bank ID)	Leave blank for UK banks.
Bank Name	Enter a description of the branch. Include the location of the branch, not just the bank name.

Defining Bank Branches

Access the Branch Table page.

Bank Table

Branch Table

Country Code: AUS Australia

Bank ID: CTI

Bank Name: Citibank Limited

Bank Type: Commercial

Short Desc: Citibank

Branch Information

Find | View All

First 1 of 1 Last

*Branch ID: 242-210

*Status: Active

Branch Name: Martin Place

Short Name: Martin PI

AC Branch Name:

Brazil

Verifier Digit:

Branch Location:

Contract Number:

Branch Table page

Branch ID

Enter the branch ID for the bank. Branch ID formats vary by country.

Click the Address Information button to access the Bank Branch Address page.

AC Branch Name (alternate character branch name)

This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the branch name in single-byte, Katakana format.

(GBR) Special Considerations for UK Customers

UK customers who are setting up UK building societies enter the following information on the Branch Table page:

- Bld Soc ID (building society ID)

Enter a unique identifier for the building society.
- Status

You can enter employee account details only for building societies with an active status.
- Bld Soc Name (building society name)

Enter the full name of the building society.
- Account Number

Enter the number of the building society’s account at the clearing bank.

Click the Address Information button to access the Building Society Address page, where you enter the building society’s head office address.

(BRA) Brazil

Verifier Digit Enter the bank-assigned verifier digit. File transfers may require the verifier digit.

Contract Number Enter the agreement number with the bank branch.

(GBR) Setting Up UK Banks and Building Societies

Below are instructions for setting up the pages in the Bank/Branch Info component for British financial institutions. This setup is required prior to entering employee bank and building society information on the Bank Account Information page.

You must set up every bank or building society that your organization deals with during the course of business. This information is stored in the BANK_EC_TBL and BANK_BRANCH_TBL tables. A third table, PYE_BANKACCT, stores the details of your employees' bank and building society accounts.

For UK banks, set up bank branches on the Bank Table page. For building societies, use the Bank Table page to identify the bank branch that handles clearing for the society and the Branch Table page and its associated Building Society Address page to enter the building society details. The following table shows how to complete these pages:

Type of Account	Bank Table Page	Branch Table Page and Building Society Address Page
Bank Branch	Enter the name, address, and phone number of the bank branch.	Leave blank.
Building Society	Enter the name, address, and phone number of the bank branch that handles clearing for the building society.	Enter the building society name and address and the number of the account that the building society has with the clearing bank that is identified on the Bank Table page.

Warning! You must set up a building society on the Branch Table page, linking the society to its clearing bank on the Bank Table page. If you don't set up building societies as described, the BACS interfaces and processes that are provided by Global Payroll for the UK do not generate valid data.

Specifying Source Banks

Source banks are the money sources that payroll disbursements are drawn from. This section discusses how to:

- Define source banks.
- (CAN) (USA) Specify data for banks in the U.S. or Canada.
- (JPN) Specify the account type and company code.

Pages Used to Specify Source Banks

Page Name	Object Name	Navigation	Usage
Source Bank Accounts	SRC_BANK	Set Up HRMS, Common Definitions, Banking, Source Bank Accounts	Assign a source bank ID and define information about the banks that pay out money.
US and Canada Bank Additional Data	SRC_BANK_PY_SP	Click the Other Required Information link on the Source Bank Accounts page.	Specify data for banks in the U.S. or Canada.
Japan Bank Additional Data	GPJP_SRC_BANK_SEC	Click the Other Required Information link on the Source Bank Accounts page.	Specify the account type and company code.

Defining Source Banks

Access the Source Bank Accounts page.

Source Bank Accounts

Source Bank ID:

B02

*Description:

CitiBank

Status:

Active

Country Code:

USA

United States

Bank ID:

121782676

CitiBank

Branch ID:

Account #:

1746473923947

Account Name:

BN

*Currency Code:

USD

US Dollar

[Other Required Information](#)

AC Account Name:

EFT Domestic:

Bank Transfer ID:

EFT Int'l:

Source Bank Accounts page

Bank Branch ID

Select the bank branch ID, if applicable.

Account # (account number)

Enter the bank account number. Each country has its own account number format.

Other Required Information

Click this link to access the Additional Data page. Depending on the country extension that you select, you may not have this page. It is used to record information for companies that operate only in the U.S., Canada, or Japan.

See [Chapter 15, "Setting Up Banks and Bank Branches," \(CAN\) \(USA\) Specifying Data for Banks in the U.S. or Canada](#), page 273.

See [Chapter 15, “Setting Up Banks and Bank Branches,” \(JPN\) Specifying the Account Type and Company Code](#), page 274.

AC Account Name
(alternate character account name)

This field appears if you enabled AC functionality on the Primary Permission List Preferences page. Japanese users enter the bank account name in single-byte, Katakana format.

EFT Domestic (electronic funds transfer domestic)

Specify which EFT format the source bank account accepts. Enter the EFT name for domestic transactions. If the payee or recipient account is domestic, the default EFT name is taken from the EFT Domestic field of the source bank account that you selected. With domestic accounts, the country code is the same as the country code that you selected during installation.

Note. Not applicable in the U.S. or Canada.

EFT Int'l (electronic funds transfer international)

Enter the EFT name for international transactions. If the payee or recipient account is foreign, the default EFT name is taken from the EFT Int'l field of the source bank account you selected. With foreign accounts, the country code is different from the country code that you selected during installation.

(CAN) (USA) Specifying Data for Banks in the U.S. or Canada

Access [US and Canada Bank Additional Data](#) page.

US Bank Additional Data

Check Stock Form ID:	B-CHCK	
Advice Form ID:	B-ADV	
Deposit Medium:	Tape	
Prenote Wait Days:	10	

US Bank Additional Data page

The first three fields on this page are identical for both U.S. and Canadian banks.

Check Stock Form ID

If your company prints its own checks, identify the print layout and form for this source bank account.

Advice Form ID

If your company prints its own advices, identify the print layout and form for this source bank account.

For PeopleSoft Payroll for North America: Select a check stock form ID. When assigning numbers for checks or direct deposits, the Pay Confirmation and Paycheck Reprint processes reference this field to determine which check and advice numbers to use. Before you enter these IDs, define them in the Form Table.

Deposit Medium

Specify how transactions are transferred to the bank for processing. Options are *Tape*, *EFT* (electronic funds transfer), *Diskette*, and *Report*.

For PeopleSoft Payroll for North America: This field is for your information only; it does not affect the Payroll process in any way.

(USA) Prenote Wait Days

Enter the number of prenote wait days.

When a company makes transfers to a new account (for example, an employee changes the account for automatic deposits), the banks require an initial run with a dummy record to establish that this is a valid (existing) account. The specified waiting period (after the dummy run but before the funds can be transferred to this account) is called the *prenote wait days*.

Note. Allow the prenote process to validate the transit numbers, which you specify at the employee level.

(CAN) Routing Format

Enter the routing number.

The routing number specifies how, on the tape or file to the bank, the routing number (bank ID) is presented. The number can have a leading 0 and can vary, depending on whether bank ID or the branch ID comes first.

Select the format to apply to the direct payment routing numbers generated by the Direct Deposit Create File - SQR program DDP001CN. The system uses this format to deposit employees’ paychecks directly into their personal bank accounts. Valid values are:

- *Lead 0, Bank ID, Branch ID.*
- *Lead 0, Branch ID, Bank ID.*
- *Bank ID, Branch ID (no leading zero).*
- *Branch ID, Bank ID (no leading zero).*

Direct Deposit Account Number

For PeopleSoft Payroll for North America: This field is visible only when an Alternate Bank ID field is present on the Bank Table page. Enter the account number to use for making direct deposits.

See [Chapter 15, “Setting Up Banks and Bank Branches,” Identifying Banks](#), page 268.

(JPN) Specifying the Account Type and Company Code

Access the Japan Bank Additional Data page.

Japan Bank Additional Data

*Account Type	*Company Code
1 Checking	

Japan Bank Additional Data page

Account Type

The source bank account type. Values are *Checking* and *Regular*.

Company Code

The ID that is assigned to the company by the banking institution.

Reporting on Banks and Branches

Use the Bank/Branch report to create a report of the Bank/Branch table.

Page Used To Report on Banks and Branches

Page Name	Object Name	Navigation	Usage
Bank/Branch Report	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Banking, Bank/Branch Report	Use the Bank/Branch report to create a report of the Bank/Branch table.

CHAPTER 16

Setting Up Local Country Functionality

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

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

Understanding Local Country Functionality Setup

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

(CHE) Maintaining Swiss Postal Codes

This section provides an overview and discusses how to load and update postal codes for Switzerland.

Understanding Postal Code Maintenance

Here's how you update postal codes:

1. Download the latest update of postal codes from the website of the Swiss Post and note the path to the file in which you save it.
2. Download the latest update of alternate names from the website of the Swiss Post and note the path to the file in which you save it.
3. Use the Load Valid Addresses CHE page to enter the file paths and load the valid addresses and alternate names files to the Valid Addresses table.

The system uses the information on the Valid Addresses table to validate municipalities against the postal code.

Page Used to Maintain Swiss Valid Addresses

Page Name	Object Name	Navigation	Usage
Load Valid Addresses CHE	POSTAL_LOAD_CHE	Set Up HRMS, Install, Product and Country Specific, Load Postal Codes CHE	Load Swiss postal code information into the Valid Addresses table.

Updating Swiss Valid Addresses

Access the Load Valid Addresses CHE page.

Load Valid Addresses CHE

Postal Codes File:

Alternate Names File:

Load Data

	State	Postal Code	City
1	VD	1000	Chailly-sur-Lausanne
2	VD	1000	Lausanne
3	VD	1000	Lausanne 1 CC Distribution
4	VD	1000	Lausanne 12
5	VD	1000	Lausanne 13
6	VD	1000	Lausanne 14

Load Valid Addresses CHE page

- Postal Codes File** Enter the complete path to the Postal Code file that you downloaded from the Swiss Post.
- Alternate Names file** Enter the complete path to the Alternate Names file that you downloaded from the Swiss Post.
- Load Data** Click to load the postal code data into the Valid Addresses table.
- State, Postal Code, and City** Initially, these fields display the current data from the Valid Addresses table. After you run the load process, the updated information appears.

(FRA) Setting Up French Control Tables

This section discusses how to:

- Understand enterprise integration points.
- Maintain APE codes.

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

Pages Used to Set Up French Control Tables

Page Name	Object Name	Navigation	Usage
APE Table	APE_INDSTRY_CD_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, APE Table	Maintain APE codes for your French organization.
Insee Table Fra	INSEE_TABLE_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, INSEE Tabl	Maintain INSEE codes for your French organization.
Insee Table FRA - Detail	INSEE_DSCRLONG_SEC	Select the Details link on the Insee Table Fra page.	Record additional information or comments about an INSEE code.
External Variables	EXT_PARM_CD_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, External Variables	Enter information that is related to the salaries and Social Security ceilings that are established by the French government each year.
Institution Type	PENS_FUNDS_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Pension/Cont. Funds Table, Institution Type	Enter the institution type and describe the pension companies to which your employees make their pension contributions.
Institution Add. (institution address)	PENSION_FUND_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Pension/Cont. Funds Table, Institution Add.	Enter the insurance company's address information and describe the insurance company to which your employees make pension contributions. Note. This information doesn't roll into PeopleSoft Pension Administration, which is a U.S. application.
URSSAF Table	URSSAF_TABLE_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, URSSAF Table	Set up URSSAF codes.

Understanding Enterprise Integration Points

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

See Also

PeopleSoft Enterprise Integration PeopleBook

Maintaining APE Codes

Access the APE Table page.

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

Maintaining INSEE Codes

Access the Insee Table Fra page.

Insee Table Fra							
INSEE Codes							
	*INSEE Code	*Description	Short Description	Special ability	Details		
1	1101	Farmers on small-scale farming	Farmers on	☐	Details		
2	1102	Market-gardeners, horticulturi	Market-gar	☐	Details		
3	1103	Wine growers, nurserymen fruit	Wine growe	☐	Details		
4	1104	Stock-breeders of herbivores o	Stock-bree	☐	Details		
5	1105	Stock-breeders of granivores a	Stock-bree	☐	Details		
6	1106	Farmers on small-scale farming	Farmers on	☐	Details		
7	1201	Farmers on average exploitatio	Farmers on	☐	Details		

Insee Table Fra page

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

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

Special ability

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

An employee who is assigned (through the job code) an INSEE code with this check box selected can't be listed as disabled on the French Disability report.

Details

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

Entering Salary and Social Security Ceiling Information

Access the External Variables page.

External Variables

External Variables: 01

Leg&Reg Report Parameters

Find | View All First 1 of 1 Last

Effective Date: 01/01/2000

Minimum Salary: 6175.87

Retail Price Index:

Minimum Salary Guaranteed: 6175.87

Disability Report Rate: 0.06

Social Security Ceiling

Social Security Ceiling A: 14700.00

Social Security Ceiling B: 58800.00

Social Security Ceiling C: 117600.00

External Variables page

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

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

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

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

Social Security Ceiling

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

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

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

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

$$(2,279 \times 10\%) + (9,116 \times 15\%) + (18,233 \times 18\%) + (1,372 \times 20\%)$$

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Entering the Institution Type and Describing Pension Companies

Access the Institution Type page.

Institution Type **Institution Add.**

Pension Code: GF0579

Pension Institutions Find | View All First 1 of 3 Last

*Institution #:	A020	+ -
*Description:	CGIS Mornay Arrco	
Short Desc:	CGIS	

Institution Type

☐ AGIRC
 ☒ ARRCO
 ☐ Others

Institution Type page

Institution Type

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

AGIRC: Pension funds for managers (cadres).

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

Others: Contingency funds.

Setting Up URSSAF Codes

Access the URSSAF Table page.

URSSAF Code

The URSSAF is a French administration that collects the employee and employer contributions for Social Security. This table stores the codes for the local URSSAF offices.

(DEU) Setting Up the German Control Table

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

Page Used to Set Up German Industrial Inspection Codes

Page Name	Object Name	Navigation	Usage
Industrial Inspection	INDUST_INSP_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection	Set up German industrial inspection codes that you associate with locations in your organization.

Understanding Enterprise Integration Points

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

See Also

PeopleSoft Enterprise Integration PeopleBook

Setting Up German Industrial Inspection Codes

Access the Industrial Inspection page.

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

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

(ITA) Setting Up Italian City Codes

This section discusses how to load Italian city data.

Page Used to Load Italian City Data

Page Name	Object Name	Navigation	Usage
ITA City Update	RUNCTL_CITYUPDATE	Set Up HRMS, Install, Product and Country Specific, Load City Table ITA, ITA City Update	After downloading the city code data file from the Ministero delle Finanze, run the ITA City Update process to update Italian city data .

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Setting Up Country-Specific Tables”

(JPN) Setting Up Japanese Control Tables

This section discusses how to:

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

Pages Used to Set Up Japanese Control Tables

Page Name	Object Name	Navigation	Usage
Postal Code Table	POSTAL_TBL_JPN	Set Up HRMS, Install, Product and Country Specific, Postal Code Table JPN	Enter information for Japanese postal codes.
JPN Education Level Age Tbl (Japan education level age table)	EDLVLAG_TBL_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Education Level, Education Level Age Tbl JPN	Set up your company's education level age bases.
Salary Components Settings JPN	SETUP_SALCOMP_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Calculation Rule Settings	Establish your organization's standard calculation birthday and specify whether you want to use a grade range check for certain salary components.

Setting Up the Postal Code Table

Access the Postal Code Table page.

Postal Code Table	
Postal Code:	105-0023
Municipal Code:	000004  Minato-Ku
Prefecture:	13  Tokyo-To
City:	Minato-ku
Address 1:	Shibaura
AC City:	
AC Address 1:	

Postal Code Table page

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

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

Setting Up Education Level Ages

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

Calculating an Employee's Education Level Age

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

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

Acronym	Meaning
CSD	Company Seniority Date
ELA	Education Level Age

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

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

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

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

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

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

This is how we get Hiroshi's AELABa:

- Since CSD month/day (Jun 1) > SCB month/day (Apr 1), adjustment = -1
- Using this -1 we get:

$$\text{ELABa} - 1 = \text{AELABa}$$

Which in Hiroshi's case is:

$$22 - 1 = 21$$

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

This formula is:

$$\text{Year of Hire} - \text{AELABa} = \text{ELABi (year)}$$

or

$$1996 - 21 = 1975$$

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

Now we can look at how important that ELABi is.

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

SCB (including Year of Calculation) – ELABi = ELA

or

April 1, 1997 – April 1, 1975 = 22

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Compensation, “Administering Seniority Pay”

Setting Up the Education Level Age Table

Access the Education Level Age Tbl JPN page.

Education Level Age Tbl JPN					
Education Level Age					
Highest Education Level			Education Level Age Basis		
1	C	Q	C-HS Graduate or Equivalent	18	+ -
2	F	Q	F-2-Year College Degree	20	+ -
3	G	Q	G-Bachelor's Level Degree	22	+ -
4	I	Q	I-Master's Level Degree	24	+ -

Education Level Age Tbl JPN page

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

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

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

Establishing Japanese Salary Component Settings

Access the Salary Components Settings JPN page.

Salary Components Settings JPN

Standard Calculation Birthday

Educ Lvl Month: 4Educ Lvl Day: 1

Defined Range Check

☐ Defined Range Check

Salary Components Settings JPN page

Standard Calculation Birthday

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

Educ Lvl Month (education level month)

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

Educ Lvl Day (education level day)

This is the day of the month of the Standard Calculation Birthday. For example, Month 4, Day 1 sets the Standard Calculation Birthday as April 1.

Defined Range Check

Select to ensure the system checks that any component added to a Job Data - Compensation record with a compensation rate code of class *Defined Rate of Pay* (DFRPAY) is within the range that you have defined for that grade on the Salary Grade Table.

The check applies to both a manually added component and an automatically added component.

Selecting this check box also ensures that only one compensation rate code of the class DFRPAY can be entered on an employee Compensation record.

See Also

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

(NLD) Loading Dutch Postal Codes

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

Page Used to Load Postal Codes

Page Name	Object Name	Navigation	Usage
Load Postal Codes NLD	RUNCTL_POSTAL_NLD	Set Up HRMS, Install, Product and Country Specific, Postal Codes NLD	Import postal codes into the NLD Postal Code Table in your human resources system.

Importing Postal Codes Into the Postal Code Table

Access the Load Postal Codes NLD page.

Load Postal Codes NLD page

The Dutch postal authority provides a ZIP code table to which customers can subscribe. The Load Postal Code Table process loads all of the ZIP codes provided in a source file by the Dutch Post (PTT Post) into your human resources system.

Report Request Parameters

- Initial Postal Code Loadfile** Enter the initial ZIP code load file, including the path information, if you're adding Dutch postal code data to your system for the first time.
- Update Postal Code File** Enter the updated ZIP code file, including the path information, if you're doing a periodic update of the Dutch Postal Code Table.
- Run** Click to run this request. PeopleSoft Process Scheduler runs the NLD Load Postal Code Table process at user-defined intervals.

(ESP) Setting Up Spanish Control Tables

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables

Pages Used to Set Up Spanish Control Tables

Page Name	Object Name	Navigation	Usage
Insurance Company	INSUR_COMP_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company	Enter information about your organization's insurance company.
Industry Activity	INDSTRY_ACT_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity	Define the codes that are needed by your organization.

See Also

Chapter 3, "Understanding PeopleSoft HRMS System Data Regulation," page 9

CHAPTER 17

Using Pay Calendars

This chapter provides an overview of using calendars with PeopleSoft Payroll for North America and PeopleSoft Payroll Interface and discusses how to:

- Establish a pay run ID.
- Establish balances to be maintained.
- Create pay and FLSA calendars.

Note. This chapter does not apply to PeopleSoft Global Payroll.

See Also

PeopleSoft Global Payroll PeopleBook

Establishing Pay Run IDs

This section provides an overview and discusses how to define pay run IDs.

Understanding Pay Run IDs

A Pay Run ID identifies a single pay calendar to process. If you have several pay groups, you can process them together in a single run by assigning them the same Pay Run ID. To add a Pay Run ID, complete the Pay Run Table page.

Generally, all calendar entries that share a Pay Run ID have the same pay end date, but not necessarily the same pay frequency. For example, if you have a semi-monthly and a monthly pay calendar, both calendars can be processed together for the month-end run, because they have identical pay period end dates.

Note. A Pay Run ID must be unique throughout payroll history. You must create Pay Run IDs in the Pay Run Table before you enter them on the pay calendar. The Pay Run ID may be up to 10 characters. We suggest that you utilize as many of the 10 available characters as is necessary to ensure that your Pay Run ID is easily identifiable.

See Also

Chapter 17, “Using Pay Calendars,” Understanding Pay Calendars and Pay Run IDs , page 297

Page Used to Establish Pay Run IDs

Page Name	Object Name	Navigation	Usage
Pay Run Table	PAY_RUN_TABLE	- Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Pay Run Table - Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Pay Run Table - Set Up HRMS, Product Related, Benefits NLD, Pay Run Table	Define Pay Run IDs to combine pay calendar entries from different pay groups for processing.

Defining Pay Run IDs

Access the Pay Run Table page.

Pay Run Table

Pay Run ID: B-CAN1

*Description: Canadian Run 1

Short Description: CAN 1

Pay Calendar Data

Find | View All First 1 of 1 Last

Company	Pay Group	Pay Period End Date

Pay Run Table page

Short Description

Enter a short description of the pay run. This description appears on various delivered payroll reports (for example, PAY002, the Payroll Register). It also appears on the Run Control when you enter the Pay Run ID for Paysheet Creation, Payroll Calculation, and Payroll Confirmation.

Company, Pay Group, and Pay Period End Date

The Pay Calendar Data group box displays all the pay calendar entries grouped under the Pay Run ID. After you enter the Pay Run IDs on the Pay Calendar Table, return to this page to check the pay calendar data assigned to each Pay Run ID.

Establishing Balances to be Maintained

This section provides an overview of balances and discusses how to:

- Create cycles and define your balance year.
- View setIDs established for each company.
- Define the actual quarter definition by company and year for each Balance Year ID.

Understanding Balances

PeopleSoft Payroll enables you to maintain balances by calendar year, fiscal year, benefit year, or any other method you want. You specify the start and end dates for each type of balance year you define, and the quarters, periods, and date ranges for each year. You can update, adjust, and report on balance information by various year types.

Note. You must set up a calendar year for each company for which you process payroll.

Pages Used to Establish Balances

Page Name	Object Name	Navigation	Usage
Balance ID Table 1	BALANCE_ID_TBL1	• Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Balance ID Table • Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Balance ID Table	Create cycles for payroll processing according to pay group and define your balance year.
SetID - Comments	BALANCE_ID_PU	Click the SetID button on the Balance ID Table 1 or Balance ID Table 2 page.	View the setID established for each company.
Balance ID Table - Balance ID Table 2	BALANCE_ID_TBL2	• Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Balance ID Table • Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Balance ID Table	Define the actual quarter definition by company and year for each Balance Year ID.

Creating Cycles and Defining Your Balance Year

Access the Balance ID Table 1 page.

Balance Id Table 1

Balance Id Table 2

SetID: BNUSA SetID

Balance ID: BX *Description: BN_2003 Short Desc: BN'03

*Periods in a Year: 12

*Quarters in a Year: 4

☒ Bal for Calendar Year

Yr:

End Date Default

☐ None
☒ Month
☐ BiMonth
☐ Quarterly
☐ Days

☒ Maintain Earns Bal
☒ Maintain Dedn Bal
☒ Maintain Tax Bal
☒ Maintain Check Bal
☒ Maintain Garn Bal

Use Date

☒ Check Date
☐ Period End Date

Create

Balance ID details

Find | View All View All 1-4 of 12 Last

*Year	*Period	*Begin Date	*End Date	*Period Name	*Abbrev	
2003	1	01/01/2003	01/31/2003	January	Jan	+ -
2003	2	02/01/2003	02/28/2003	February	Feb	+ -
2003	3	03/01/2003	03/31/2003	March	Mar	+ -
2003	4	04/01/2003	04/30/2003	April	Apr	+ -

Balance Id Table 1 page

Note. When defining balances to be maintained, you can create a Calendar Year or a Non-Calendar Year. If you are creating a Calendar Year, select the Bal for Calendar Year check box, enter a year in the Year field, and click the Create button—all other fields become unavailable for entry. However, if you are creating a Non-Calendar Year, you must specify the Periods in a Year/Quarters in a Year, End Date Default, Use Date, Balance Type check boxes, and Balance ID Details.

- SetID** Click this button to access the SetID page, where you can see which balance setIDs are used for which companies. The SetID for the balance ID table is specified on the Company Table – Company Location page.
- Periods in a Year** If you are not setting up a balance for a calendar year, specify the number of periods in a year.
- Quarters in a Year** If you are not setting up a balance for a calendar year, specify the number of quarters in a year.
- Bal for Calendar Year**
(balance for calendar year) Select if you are setting up balances for a calendar year. This causes the remaining check boxes and edit boxes on the page (except for Description and Short Desc) to become unavailable for entry. All balance types are automatically selected for the calendar year, and the Check Date option is automatically selected. However, the Yr field and Create button appear and become available for entry.
- Yr (year)** Enter the year for the balance type.

End Date Default

If you are not setting up a balance for a calendar year, use this group box to specify the end date to apply for the calendar year.

None	Select if you do not want a specific end date for the calendar year.
Month, BiMonth, Quarterly, Days	Select the corresponding option if you want a monthly, bimonthly, quarterly, or daily end date.
Maintain Earns Bal, Maintain Tax Bal, Maintain Dedn Bal, Maintain Check Bal, Maintain Garn. Bal	If you are not setting up a balance for a calendar year, select the corresponding check box to maintain earnings balances, tax balances, deduction balances, paycheck balances, or garnishment balances for the year you are creating.
Note. Each of these balances are maintained for the year being defined. For example, if you are defining a fiscal year and Maintain Earns Bal was selected, earnings balances for the fiscal year is maintained.	

Use Date

If you are not setting up a balance for a calendar year, use this group box to select the balance types you want to maintain. You must set up the first period, begin date, and end date for each company and year. After you enter this, the begin and end dates are set by default automatically for each row for that company/year.

Check Date	Select to maintain balances by the check date being processed. For example, if you are defining a fiscal year of July 1, 1999 - June 30, 2000 and your Check Date was June 23, 2000, the balance would be included in this fiscal year. If, however, the Check Date were July 1, 2000, the balance would be in the next fiscal year.
Period End Date	Select to maintain balances by the period end date being processed. For example, if you are defining a fiscal year of July 1, 1999 - June 30, 2000 and your Check Date was June 23, 2000, the balance would be included in this fiscal year. If, however, the Check Date were July 1, 2000, the balance would be in the next fiscal year.
Create	Click this button to instruct the system to automatically populate the company, year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

Balance ID Details

If you are not setting up a balance for a calendar year, use this group box to specify the year, period, begin date, end date, period name, and abbreviated fields for the specified company and year.

Note. You only need to set up the first entry for year, period, begin date, and end date. After you enter this information, the begin and end dates are set by default automatically for the other rows—based on the values entered in Periods in a Year and Quarters in a Year.

Year, Period, Begin Date, End Date, Period Name	Enter the year, period, begin date, end date, and period name for the balance type.
Abbrev (abbreviation)	Enter the abbreviation for the period name.

Viewing SetIDs Established for Each Company

Access the SetID - Comments page.

Comments

Balance SetID				Customize Find View 100		First	1-5 of 723	Last
SetID	Set Control Value	Record Group ID	Record (Table) Name					
AUS	AUS	PY_01	BALANCE_ID_TBL	+	-			
AUS01	AUS01	PY_01	BALANCE_ID_TBL	+	-			
AUS01	KAM	PY_01	BALANCE_ID_TBL	+	-			
AUS01	KAT	PY_01	BALANCE_ID_TBL	+	-			
AUS01	KBI	PY_01	BALANCE_ID_TBL	+	-			

Comments page

The SetID page displays the SetID established for each company. This helps you to know which SetID to enter for a specific company.

Defining the Quarter by Company and Year for Each Balance Year ID

Access the Balance ID Table 2 page.

Balance Id Table 1

Balance Id Table 2

SetID: BNUSA

Balance ID: BX BN_2003 BN'03

Periods in a Year: 12

Quarters in a Year: 4

☒ Bal for Calendar Year

End Date Default

☐ None
☒ Month
☐ BiMonth
☐ Quarterly
☐ Days

☒ Maintain Earns Bal
☒ Maintain Dedn Bal

☒ Maintain Tax Bal
☒ Maintain Check Bal

☒ Maintain Garn Bal

Use Date

☒ Check Date
☐ Period End Date

Balance ID details

Find | View All First 1-4 of 4 Last

*Year	*Qtr	*Period Name	*Abbrev	*From Per	*To Period:		
2003	1	Quarter 1	Q1	1	3	+	-
2003	2	Quarter 2	Q2	4	6	+	-
2003	3	Quarter 3	Q3	7	9	+	-
2003	4	Quarter 4	Q4	10	12	+	-

Balance Id Table 2 page

If you selected the Bal for Calendar Year check box and clicked the Create button on the Balance ID Table 1 page, the field information for the Balance ID Table 2 page automatically appears.

If you did not specify a balance type with a calendar year in the Balance ID Table 1 page, you must enter a value for the Year, Qtr, Period Name, Abbrev, From Period, and Thru Period fields. For each row you add after the first, the From Period field is set by default, based on the value in Quarters in a Year.

See Also

Chapter 17, “Using Pay Calendars,” Creating Cycles and Defining Your Balance Year, page 293

Creating Pay and FLSA Calendars

This section provides an overview of pay calendars and pay run IDs and discusses how to:

- Build pay calendars manually.
- Specify interface status and periods for Federal Leave Accrual processing.
- Set up FLSA Calendars.
- Run the Confirm Error process.
- Build pay calendars automatically.

Understanding Pay Calendars and Pay Run IDs

Use the pay calendar to schedule payroll cycles for your pay groups. In the Pay Calendar Table, you provide information regarding when pay periods begin and end. Use Pay Run IDs to indicate to the system which pay calendar entries to process together.

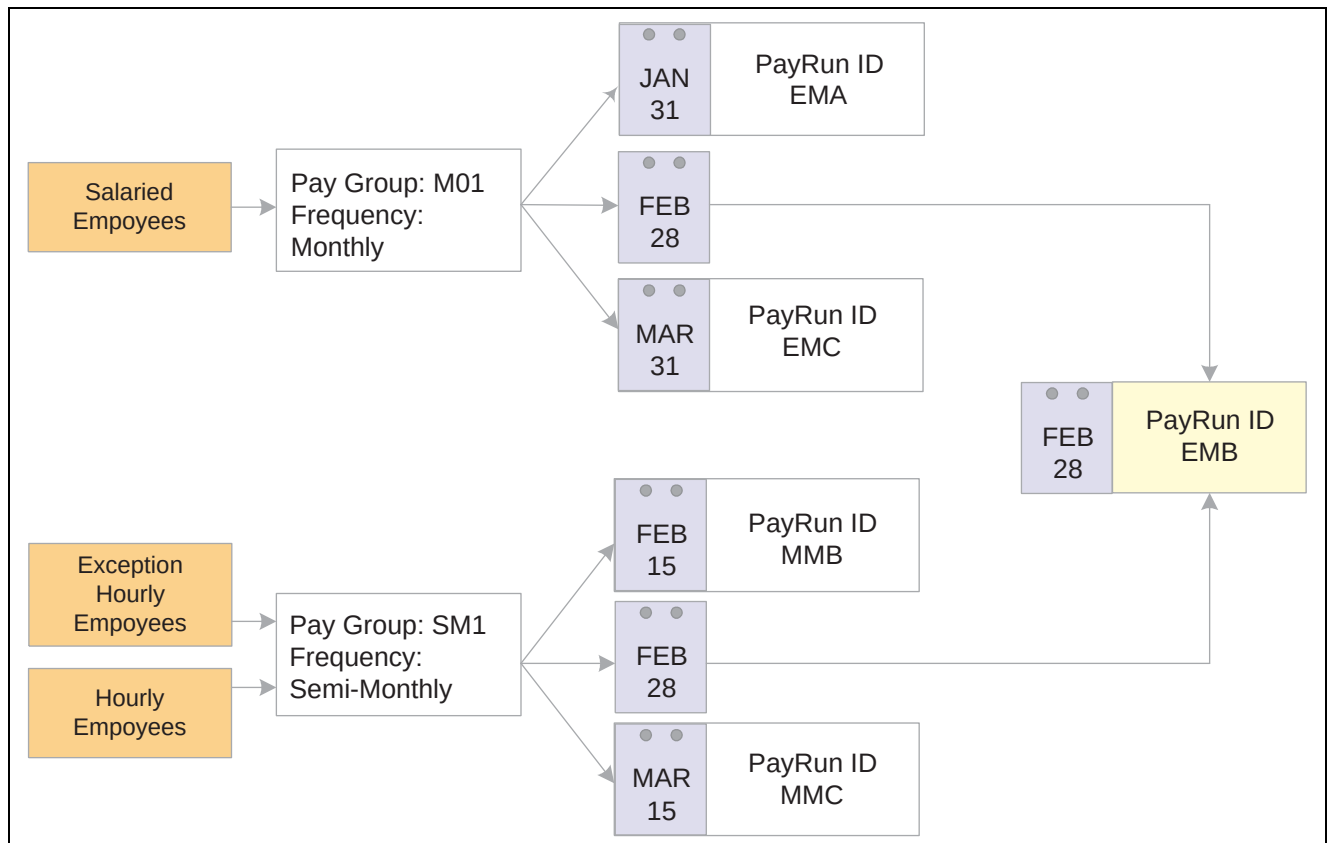
Each entry on the Pay Calendar Table corresponds to a specific pay period, defined by its begin and end dates, for a pay group. A monthly pay group has 12 entries in the Pay Calendar Table, representing one year of processing.

Group pay calendar entries from different pay groups together for processing using a Pay Run ID, which you define on the Pay Run Table. To process payrolls, the pay calendar entry being processed must be assigned a run ID. Generally, all pay calendar entries that share a Pay Run ID have the same pay end date, but not necessarily the same pay frequency. Typically, but not always, you would set up a different Pay Run ID for each Pay Period End Date on the Pay Calendar Table.

Example

For example, if you have a semi-monthly and a monthly pay calendar, you can process both calendar entries together for the month-end run, because they have the same pay period end date. Your processing schedule determines which groups can or can't be grouped together.

In the following illustration, CCB has assigned the same Pay Run ID (EMB) to both the February 28 Monthly calendar entry and the February 28 Semimonthly entry to enable the system to process them at the same time.



Assigning Pay Run IDs

Building Pay Calendars Manually or Automatically

You can build the pay calendar manually or have the system do it for you automatically.

If you choose to build the pay calendar manually, you use the Pay Calendar Table for each calendar entry you want to add. Remember that you must have a calendar entry for every pay period for each pay group you set up.

Pages Used to Create Pay and FLSA Calendars

Page Name	Object Name	Navigation	Usage
Pay Calendar Table	PAY_CALENDAR_TABLE	- North American Payroll, Payroll Processing, Create Paysheets, Create Single Pay Calendar - North American Payroll, Payroll Processing CAN, Create Paysheets, Create Single Pay Calendar - North American Payroll, Payroll Processing USF, Create Paysheets, Single Pay Calendar - Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Pay Calendar Table - Set Up HRMS, Product Related, Benefits NLD, Pay Calendar Table	Create pay calendars manually for payroll processing by pay group.
Open/Close Pay Calendar	RUNCTL_PAY130	North American Payroll, Annual Processing, Open/Close Pay Calendar	Update to off-cycle of a closed pay calendar.
Open/Close Pay Calendar (process)	RUNCTL_130CN	North American Payroll, Payment Reports CAN, Open/Close Pay Calendar	Reopen a closed pay calendar for the purpose of entering year-end adjustments required after processing the first payroll of the year.
Payroll Status	GVT_PAY_STATUS_SEC	Click the Federal button on the Pay Calendar Table page.	Indicate whether interfaces have been run and specify periods for Federal Leave Accrual processing.

Page Name	Object Name	Navigation	Usage
Confirm Error Option	PAY_CALENDAR_TBL2	- North American Payroll, Payroll Processing, Create Paysheets, Create Single Pay Calendar - North American Payroll, Payroll Processing CAN, Create Paysheets, Create Single Pay Calendar - North American Payroll, Payroll Processing USF, Create Paysheets, Single Pay Calendar - Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Pay Calendar Table - Set Up HRMS, Product Related, Benefits NLD, Pay Calendar Table	Run the Confirm process without addressing outstanding payroll messages.
FLSA Calendar Table	FLSA_CALENDAR	Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, FLSA Calendar Table	Set up FLSA calendars.
Create FLSA Cal Periods	RUNCTL_FLSACALPD	Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Initial FLSA Calendar	Creates FLSA calendars for existing pay groups and pay calendars. Use this process if you created calendars but did not create FLSA calendars at that time, such as during an upgrade or if pay group FLSA status is updated or changed.
Pay Calendar Creation	RUNCTL_PAY_CAL_BLD	- Set Up HRMS, Product Related, North American Payroll, Compensation and Earnings, Pay Calendar Table - North American Payroll, Payroll Processing CAN, Create Paysheets, Create Pay Calendars - Set Up HRMS, Product Related, Payroll Interface, Create Pay Calendars	Create a pay calendar automatically.

Page Name	Object Name	Navigation	Usage
Pay Calendar Report	PRCSRUNCNTL	Set Up HRMS, Product Related, North American Payroll, Comp/Earnings Table Reports, Pay Calendar	Generate a report that lists information from the Pay Calendar Table, which contains the cycles that you create for payroll processing by pay group. Each entry in the table corresponds to a pay period for a pay group.

Building Pay Calendars Manually

Access the Pay Calendar Table page.

Pay Calendar Table [Confirm Err Option](#)

Company: BN1 Company BN1 ☐ Off-Cycle Calendar? ☐ Off-Cycle Ded Override

Pay Group: BST EGTRRA SAVINGS

Pay Period End Date: 08/31/2003 **Pay Run ID:**

***Pay Period Begin Date:** 08/01/2003 **Aggregate ID:** ***Paycheck Issue Date:** 09/05/2003

Pay Period Close Date: 08/31/2003

Weeks in this Period: 4

***Pay Periods Per Year:** 12

Balance ID details [Find](#) [View All](#) First 1 of 2 Last

Balance ID	Year	Quarter	Period
BX BN'03	2003	3	9

Accrual Percent: ☐ Reverse Accruals ***FLSA On-Cycle Pay End Date:** 08/31/2003

***Benefit Deductions Taken:** Deduction **Benefit Ded Subset ID:**

***General Deductions Taken:** Deduction **General Ded Subset ID:**

Pay Period of the month ☒ First ☐ Second ☐ Third ☐ Fourth ☐ Fifth

☐ Paysheets Run ☐ Payroll Confirmation Started ☐ GL Interface Run ☐ T&L Extract costs

☐ Payroll Preliminary Calc Run ☐ Payroll Confirmation Run ☐ Off-Cycle Calcs Outstanding ☐ Single Chk for Multiple Jobs

☐ Payroll Calculation Run ☐ Pay Distribution Run ☐ Off-Cycle Closed ☐ CA GL Interface Run

Pay Calendar Table page

Off-Cycle Calendar?

Select to identify the pay calendar as off-cycle processing. Two types of processing are associated with a pay calendar: on-cycle and off-cycle. On-cycle processing is the normal, scheduled payroll processing for a pay group and pay period. Off-cycle processing is any other payroll activity that deviates from the norm. Typically, off-cycle activity consists of recording manual checks issued during this period, on-demand checks calculated and issued during this period, and reversals processed during this period. This option enables you to run a group of off-cycle checks that are associated with a specific check date which may differ from your on-cycle check date.

Off-Cycle Ded (off-cycle deduction override)

For an off-cycle run, select this check box to specify that the Pay Calculation process should use the deduction override process to determine deductions.

If Off-Cycle Calendar is selected and Off-Cycle Ded Override is cleared, then the deduction override evaluation process is bypassed during pay calculation.

That means that employee-level benefit or general deduction override will not take effect. This might be useful for an off-cycle bonus run.

Federal

(USF) Click this button to access the Payroll Status page.

Pay Period End Date

The pay period end date appears here. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determines if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day.

The pay calculation program uses these dates to determine which deductions and additional pays to use.

Pay Period Begin Date

Enter the pay period begin date. The system uses this date to determine if an employee's pay should be prorated. It also checks this date to see whether a holiday falls within the pay period and determine if the employee is active within that pay period. Therefore, the system knows whether to pay the employee for that day.

The pay calculation program uses these dates to determine which deductions and additional pays to use.

Pay Run ID

Select a pay run ID. Each payroll batch process must have a pay run ID to determine what pay groups to process. All pay calendar entries with the same Pay Run ID are processed at the same time. Before you start payroll processing for a pay period, you must assign a Pay Run ID on this page, and that ID must first be defined on the Pay Run Table page. The Payroll Process cannot run without a Pay Run ID.

Aggregate ID

Enter an aggregate ID to indicate aggregate taxation. Normally, you use the aggregate tax method when you must pay employees more than once in a single pay period. Every pay calendar with the same Aggregate ID value is aggregated together (including Off-Cycle payrolls) for the purposes of tax calculations. All wages paid on each calendar with the same Aggregate ID are combined, then annualized and taxed accordingly. Typically this field is utilized by temporary agencies where employees are paid.

Example: An employee might be part of a weekly pay group and receive payment on Tuesday for work performed on Monday and Tuesday. On Wednesday, he might switch to a different, one-day job and be paid on that same day. The same employee might then work a third job on Thursday and Friday and receive a third payment on Friday. Using the ordinary annualized tax calculation method, each of these three checks would be taxed as if the earnings on each check were for an entire week, because the employee's pay period has been defined as weekly. The result would be that the total amount of taxes withheld for the week would be too low. To prevent this from happening use the aggregate tax method.

Paycheck Issue Date

Select a paycheck issue date. This date appears on the employee's paycheck or advice slip. It determines the Calendar Year, Quarter, and Period for all payroll balances. In addition, the system uses the paycheck issue date to find the appropriate effective-dated entry in the tax tables to use for this pay calculation.

Weeks in this Period

Enter a value to indicate the number of weeks within the payroll cycle. Depending on the state in which your employees are based, you may need to use this field for tax reporting. The number of weeks is based on the number of Wednesdays in the pay period.

Pay Periods Per Year

Enter a value to indicate the number of pay periods per year. When the system calculates deductions, it checks the deduction table, annualizes the amount of each deduction, and then divides the result by the number of pay periods per year.

Example: If you set up a deduction for \$100 per month, the system multiplies \$100 by 12 to arrive at \$1200, and then, for employees paid monthly, divides by 12 to arrive at a deduction of \$100 per pay period. For semi-monthly employees, the system divides the deduction by 24.

For weekly and biweekly pay periods, it is not quite so simple. Depending on the day of the week on which the payday falls, there may be 53 (instead of 52) weekly pay periods during a given year; likewise, there may be 27 (instead of 26) biweekly pay periods. To accommodate this situation, in the Pay Periods Per Year field, specify whether the pay calendar you're defining has 26, 27, 52, or 53 Pay Periods Per Year.

The system always annualizes amounts by multiplying by 52, 26, 24, or 12, depending on whether the deduction is weekly, biweekly, semimonthly, or monthly; it de-annualizes by dividing by the number you enter for the number of pay periods per year.

Note. For monthly and semi-monthly pay calendars, the Pay Periods Per Year field is unavailable for entry; the only valid values are *12* and *24*.

Balance ID Details

This group box displays the year, quarter, and period applicable to the pay period for each Balance ID for which you're maintaining balances.

Accrual Percent

Enter an accrual percent to calculate accrual totals for the general ledger interface. This percentage is typically used to process pay periods that overlap accounting periods or don't correspond to calendar months. For example, if payroll is processed weekly, but general ledger is processed monthly, you may need to make adjustments. If you specify a percent here, that percent of pay for the last pay period of the month is added to accrual amounts for the general ledger Interface. Then, in the first pay period of the following month, you can reverse those accruals by selecting the Reverse Accruals check box and leaving the Accrual Percent field clear. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface.

Reverse Accruals

Select to reverse accruals added to the General Ledger Interface. The system responds by subtracting the accruals from the appropriate amounts in the General Ledger Interface. However, if you select this check box, you must leave the Accrual Percent field clear. If the Accrual Percent field is not clear, the Reverse Accruals check box must be cleared.

Note. The Accrual Percent field and Reverse Accruals check box are not applicable to PeopleSoft Payroll for E&G.

**FLSA On-Cycle Pay
End Date**

Select a pay end date for FLSA off-cycle processing. This field applies only to off-cycle calendars. For on-cycle calendars, this field is unavailable for entry. If the earnings being paid in the off-cycle are subject to FLSA (Affect on FLSA check box on the Earnings Table – General page is not set to None), enter the on-cycle pay end date to which the earnings should be applied. The system uses this date to determine the correct FLSA period.

Benefit Deductions Taken

Select a value to indicate how to take benefit deductions for this pay run. The default value is *Deduction*.

- *None:* Select this value if you do not want to take benefit deductions.
- *Deduction:* Select this value if you want to use the regular benefit deductions defined on the Deduction Table pages for these employees. This is the default value.
- *Subset:* Select this value if you want to use a specified benefit deduction subset. If you select this value, you must specify the subset ID in the Benefit Ded Subset ID (benefit deduction subset ID) field.

General Deductions Taken

Select a value to indicate how to take general deductions for this pay run. The default value is *Deduction*.

- *None:* Select this value if you do not want to take general deductions.
- *Deduction:* Select this value if you want to use the regular deductions defined on the Deduction Table pages for these employees. This is the default value.
- *Subset:* Select this value if you want to use a specified general deduction subset. If you select this value, you must specify the subset ID in the General Ded Subset ID (general deduction subset ID) field.

Pay Period of the Month

Use this option to assign a pay period to the earnings and deductions designated for this calendar entry. When you create paysheets, the system checks if the pay period for additional pay matches the pay period being processed, then adds the additional pay to the paysheet. During Pay Calculation, if the pay period for a deduction matches the pay period being processed, the system takes the deduction from gross pay. Select the corresponding option to specify the pay period of the month you want: *First*, *Second*, *Third*, *Fourth*, and *Fifth*.

Reviewing Payroll Milestones

The check boxes across the bottom of the Pay Calendar Table page are unavailable for entry. The system maintains this section, which consists of process indicators, or milestones, that indicate how far along you are in the payroll process for this calendar entry. For example, if you have already created paysheets, completed your final Pay Calculation, and run Pay Confirmation, the system selects several check boxes on the Pay Calendar Table page, representing the steps you have already completed.

The batch programs and SQRs maintain these indicators. During payroll processing, the system queries these indicators to verify that you are running the payroll batch processes in the correct order.

You should run your GL Interface only after you have completed your on- and off-cycle payrolls for a pay calendar entry. After the GL Interface has been run, the system won't allow you to enter any more payroll transactions for that calendar entry. If GL interface Run is selected, you cannot rerun the process until resetting the check box and it has no effect on processing adjustments for the pay period. You can still run adjustments until the Off-Cycle Closed check box is selected.

After a payroll is confirmed for the next pay period, the system selects the Off-Cycle Closed check box, and you can no longer run off-cycle payrolls against this calendar.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Deductions,” Creating Deduction Subsets

PeopleSoft 8.8 Payroll for North America PeopleBook, “Working With Checks and Direct Deposit”

PeopleSoft 8.8 Payroll for North America PeopleBook, “Reviewing, Adjusting, and Deleting Employee Balances”

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Deductions”

(USF) Reviewing Interface Status and Periods for Federal Leave Accrual Processing

Access the Payroll Status page.

Payroll Status

☐ Leave Accrual Run

Interface Status

☐ RITS Interface Run ☐ TSP Interface Run ☐ Treasury Interface Run

Pay Year

Pay Year: 8224 Pay Period Number: 12

Year Indicators

☐ Calendar Year Begins ☐ Leave Year Begins ☐ Leave Year Ends

☐ Pay Year Begins ☐ Fiscal Year Begins

OK Cancel

Payroll Status page

Payroll Status

Leave Accrual Run

This check box is updated by the Leave Accrual process that you run after payroll is confirmed.

Interface Status

The check boxes in this group box indicate whether the RITS Interface, TSP Interface, or the Treasury Interface has been run for the pay calendar.

Pay Year

Pay Year The IRR process requires a Pay Year. When processing IRRs, the IRR Fiscal Data Accumulator identifies all monies that come from the Pay Year. Enter the pay year to which this pay calendar applies.

Year Indicators

Calendar Year Begins Federal Leave processing uses this check box. If the pay calendar is for a pay period designated to begin the Leave Plan Calendar Year for a particular Leave Type, select this check box.

Leave Year Begins This check box is used by Federal Annual Leave Accrual processing only. If the pay calendar is for a pay period designated to begin the Annual Leave year, select this check box.

Note. The leave year begins on the first day of the first full pay period for which the begin and end dates are both within the new year. The leave year ends on the last day of the last pay period ending just before the pay period of the new leave year.

Pay Year Begins This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Pay Year. If the pay calendar is for a pay period designated to begin the Pay Year for Leave Accrual processing, select this check box.

Fiscal Year Begins This check box is used by Federal Annual Leave Accrual processing on Leave Types for which accrual begins with the Fiscal Year. If the pay calendar is for a pay period designated to begin the Fiscal Year for Leave Accrual processing, select this check box.

Leave Year Ends This check box is for your information only. It enables you to identify the pay calendar that is intended to represent the leave year end.

Setting Up FLSA Calendars

Access the FLSA Calendar Table page.

Flsa Calendar Table	
FLSA Calendar ID:	T28SATFRI
FLSA Period in Days:	28
FLSA Period Start Date:	05/30/1998
FLSA Dates Find View All First ◀ 1-8 of 8 ▶ Last	
FLSA Begin Date	FLSA End Date
05/30/1998	06/26/1998
06/27/1998	07/24/1998
07/25/1998	08/21/1998
08/22/1998	09/18/1998
09/19/1998	10/16/1998
10/17/1998	11/13/1998
11/14/1998	12/11/1998
12/12/1998	01/08/1999

Flsa Calendar Table page

You must define FLSA calendars for each pay group in your company that has distinct FLSA periods and FLSA period start dates. If several pay groups have the same FLSA periods and FLSA period start dates, you can use the same FLSA calendar for all of them. The same process that creates pay calendars also creates FLSA Calendars.

FLSA Calendar ID

The FLSA Calendar ID that you added or selected in the entry page displays here. Use the FLSA Calendar ID to link an FLSA calendar to a pay group. For example, an FLSA Calendar ID of 14, MON-SUN, would be linked to pay groups whose pay period is 14 days and whose FLSA pay period begins on Monday and ends on Sunday. This ID is then used on the FLSA Period Definition page to associate the FLSA calendar to the pay group.

FLSA Period in Days

Use this field to define the length of the FLSA period for this Calendar ID. The information you enter here is used with the FLSA Period Start Date to determine the FLSA Begin Dates and FLSA End Dates, which display on this page after you've created FLSA calendars.

FLSA Period Start Date

Use this field to define the starting date from which succeeding FLSA periods are set. You should set this field to the earliest start date of any of the pay groups that use this FLSA Calendar ID.

Note. After you create the FLSA calendar from the Pay Calendar build, the FLSA Calendar Table page becomes display-only. Each row in the display-only part displays the FLSA Begin and End Dates for one FLSA work period. After you create the FLSA calendar and it becomes display-only, you cannot make any changes or corrections. If you run a payroll later that does not have an FLSA calendar already created, you have to run the Pay Calendar build. The additional FLSA calendars are created when the pay calendar for that payroll is created. Additionally, you must add the FLSA Calendar ID to the system before you can complete the Pay Group Table. This does not apply for pay groups that are defined as Fixed FLSA Period and have Use Basic Formula selected on the FLSA Period Definition page.

See *PeopleSoft 8.8 Payroll for North America PeopleBook*, “(USA) Setting Up and Calculating FLSA Rates”.

Running the Confirm Error Process

Access the Pay Calendar Table - Confirm Error Option page.

Pay Calendar Table **Confirm Err Option**

Company: BN1 Company BN1 **Off-Cycle Calendar?** ☐

Pay Group: BST EGTRRA SAVINGS

Pay Period End Date: 08/31/2003 ☐ **Continue With Errors**

Error Pay End Date: 08/31/2003

Confirm Err Option page

You can use this page to select which payroll messages to bypass during the Confirm process and to indicate the number of times each message can be bypassed before stopping the Confirm process.

Continue With Errors	Select this check box if you want the payroll process to continue when the system encounters error messages that are defined for the Continue With Errors functionality.
Error Pay End Date	Select an error pay end date that represents the end date of the off-cycle payroll in which you want to correct and pay the employees who are bypassed during the regular pay run.
Off-Cycle Calendar?	If you selected this check box on the Pay Calendar Table page, this check box is selected—if you did not, the check box is clear.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Setting Up the Payroll Process,”
Understanding Payroll Messages

Building Pay Calendars Automatically

Access the Pay Calendar Creation page.

Pay Calendar Creation

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) **Run**

Process Request Parameter(s)

*Company:

*Pay Group:

*Pay Period End Date:

Check Date Days From Pay End Date:

Pay Periods Per Year:

Pay Calendar Creation page

You may want to run the Pay Calendar Creation (CALENDAR) batch process to automatically build the pay calendar entries for all or part of a year. To build a pay calendar automatically, you must create the run control data on the Pay Calendar Creation page, run the Pay Calendar creation program, and review any error messages.

The Pay Calendar Creation process doesn't automatically assign values to Pay Run ID, Accrual Percent, Reverse Accrual, Aggregate ID, Off-cycle Pay End Date, Deduction Subset ID, or Deduction Taken.

After you run the batch program, you must complete the appropriate fields on the Pay Calendar Table before you start running your payroll. Although Accrual Percent and Reverse Accrual are optional, all pay calendars must have a Pay Run ID before you run the payroll.

Remember that you need to follow the same steps for each pay group. Each time you run the Pay Calendar Creation process, the system deletes the control data. Therefore, whenever you need to rerun the process, you must enter the control data again.

Pay Period End Date	Enter a pay period end date for the pay calendar. For example, for a semi-monthly payroll for 1999, enter <i>01/15/99</i> . To build a pay calendar for a partial calendar year, enter the end date of the pay period where you want the calendar to start. In other words, to start the calendar for the pay period ending on March 15, enter <i>03/15/99</i> .
Check Dt Days From Pay End Dt	Enter a value representing the number of days (plus or minus) from the pay period end date to the check issue date. For example, if the pay period end date is January 31 and the check date is February 3, set the number of days to 3. If the pay period end date is January 31 and the check date is January 30, enter <i>-1</i> . Should the check date fall on a holiday or weekend day, the system automatically searches backwards on the calendar to find the first workday before the holiday or weekend day to issue checks.
Pay Periods Per Year	The number of pay periods per year appears. This number depends on the Pay Frequency assigned to the pay group.

Run

Click to access the Process Scheduler request page, where you can specify where a process or job runs and the process output format.

CHAPTER 18

Setting Up Payroll Tax Tables

This chapter provides an overview of defining payroll taxes and discusses how to:

- (USA) View federal and state tax information.
- (USA) Update local tax information.
- (USA) Work with tax reciprocity.
- (USA) Update the Taxable Gross Definition table.
- (USA) Enter a state's marital status codes.
- (CAN) View Canadian tax information.
- (USA) Establish company state taxes.
- Define an entry for the Local Tax table.
- (USF) Set up state and locality tax routing.
- Establish tax types for PeopleSoft Payables integration.
- (USA) Define tax locations.
- Define tax forms.
- (E&G) Establish 1042 processing for non-resident aliens.
- (USA) Establish UI report codes.
- (USA) Establish U.S. standard occupational classifications for Alaska.
- (USA) Specify voluntary disability insurance plan location and contact information.
- (USA) Specify parameters for yearly and quarterly tax reporting.
- (CAN) Define Canadian tax information.
- (CAN) Define Canadian WCB assessment reporting.

Note. Although PeopleSoft Payroll Interface does not calculate taxes, the Payroll for North America tax tables store tax information, such as state and locality codes, which can be used by Payroll Interface. This chapter examines the tax tables that PeopleSoft provides and maintains and those that your company is responsible for initializing and updating.

If you use just Payroll Interface, then you can skip the first part of the chapter and proceed directly to Tax Tables That You Maintain. You do not need to apply tax updates. Remember that taxes are calculated in your payroll system, not by Payroll Interface. However, read this chapter to map and export employee-level tax codes to your payroll system from PeopleSoft.

Understanding Payroll Tax Tables

The PeopleSoft Payroll tax tables store tax information that the system requires to calculate and report taxes. PeopleSoft provides and maintains most of the payroll tax tables.

PeopleSoft Payroll for North America delivers tax data for all federal and state or provincial taxing entities and almost all localities. Should you need a locality that PeopleSoft does not yet support, you can add and maintain entries using the tax pages. If you need to make a change or addition to the standard tax information delivered with the system, you are responsible for maintaining the change until it is incorporated into PeopleSoft-maintained tax tables. After you notify us of the missing locality, PeopleSoft will add it to our standard system and maintain it for you in subsequent releases.

You are responsible for completing the tax tables that contain data specific to your company.

Note. The pages for Federal/State Tax, Taxable Gross Definition, and Canadian Tax tables reference more than one table.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Accessing Year-End Processing Instructions”

(USA) U.S. Tax Tables

Some U.S. tax tables are maintained by PeopleSoft, others are maintained by the employers.

PeopleSoft-Maintained Tables

These are the PeopleSoft-maintained tables for U.S. employers:

- Federal/State Tax and Local Tax tables, which contain rates and other constants used in the calculation of most forms of taxes for U.S. federal, state, and local taxing entities.
- State and Local Tax Reciprocity tables, which define reciprocal taxing rules between states and localities, and other rules for determining tax liabilities for multiple jurisdictions.
- Taxable Gross Definition table, which identifies differences between states or localities and the federal government in the definition of taxable wages.
- SWT Marital Status table, which defines the valid tax marital status codes for each state.

Employer-Maintained Tables

U.S. employers must define and maintain the following tables:

- Tax Location table, which contains the work locations for which you process payroll and taxes.
- Company State Tax and Company Local Tax tables, which store tax identification numbers, unemployment and disability experience rates, and general ledger codes for the states and localities for which your company collects and pays taxes.
- Tax Reporting Parameters table, which controls the execution of many of your quarterly and annual tax reports and specifies data needed for magnetic media filing.

(CAN) Canadian Tax Tables

Some Canadian tax tables are maintained by PeopleSoft, others are maintained by the employers.

PeopleSoft-Maintained Tables

Canadian Tax tables, which contain rates and other constants used in the calculation of all forms of federal, provincial, and Quebec taxes.

Employer-Maintained Tables

Canadian employers must define and maintain the following tables:

- The Canadian Wage Loss Plan table, which identifies your organization's valid wage loss replacement plans and general ledger account numbers.
- The Canadian Company Tax table, which defines the Prescribed Interest rate, Provincial Premium Tax rate, and Health Insurance rate override.
- Canadian Tax Reporting Parameters table, which controls the execution of many quarterly and annual tax reports and specifies data needed for magnetic media filing.

(USA) Viewing Federal and State Tax Information

This section provides overviews of viewing federal and state tax information and discuss how to:

- View standard deductions, allowance amounts, and supplemental taxes.
- View special tax amounts.
- View wage bracket tax rate information.
- View additional wage rates information.

Understanding Federal and State Tax Information

Use the Federal/State Tax Table pages to view the tax data PeopleSoft Payroll uses to calculate U.S. federal, state, and certain local taxes. These pages supply the following information:

- Identify the general type of withholding tax calculation employed by each jurisdiction and provide all the constants needed by the calculation routines for income tax withholding and unemployment and disability taxes.
- Contain the wage bracket tax rate data used by the taxing authorities for implementing graduated taxes.

Special State Codes for Localities Using Graduated Tax Tables

In addition to the rules for state withholding, the rates for calculating federal withholding, FICA, and federal unemployment are defined on this table, primarily because the method of calculation is similar. Localities that use graduated tax tables are also included. These entries are identified by special state codes such as Z1 and Z2. Here are some of these special codes:

Code	Description
\$E	Earned income credit
\$U	U.S. federal tax
Z1	New York City local tax
Z2	Yonkers local tax
ZA	Maryland 3.01% local tax
ZB	MD resident works in DE

Understanding Supplemental Tax Calculations

PeopleSoft Payroll tax processing supports the various tax calculation methods required by some states for supplemental earnings, including the use of aggregate tax methods.

The methods used for calculating withholding tax on supplemental payments may differ depending on the following criteria specified on the Federal Tax Table — General page:

Paid With Regular Wages The employee receives a supplemental payment paid with regular wages.

Separate Payment The employee receives a supplemental payment as a separate payment.

PeopleSoft delivers the required value in these fields. The possible values are:

- *Aggregate – No Annualize*
- *Aggregate*
- *Aggregate – No Tax else Percent*
- *Percent of Taxable Gross*
- *Special Table with Exemptions*
- *Special Table*

This section provides an explanation and examples of each of these methods.

Note. PeopleSoft uses the term “normal wages” to mean the employee’s pay from regular (REG) earnings taxed using the annualized tax method.

Aggregate – No Annualize

This method is valid only for Delaware and is used only for supplemental wages paid separately from normal wages.

Normal wages are annualized, but supplemental wages are not annualized, as follows:

- Annualize the employee's normal wages and compute tax on this amount.
- Annualize normal wages, add in the supplemental wages, and compute tax on the total.
- Subtract the difference in the tax amounts. The remainder is the withholding on the supplemental wages.

Example:

A Delaware employee, single with one allowance, earning \$500 per week, is paid a \$5000 bonus as a separate check.

Without Bonus		With Bonus
\$26,000.00	Annualize Gross Wages	\$31,000.00
1,104.55	Annual Delaware Tax	1,426.15
	Tax on Wages w/o Bonus	(1,104.55)
	Tax to Withhold on Bonus	321.60

Aggregate

For supplemental wages paid with normal wages, calculate withholding (using the annualized method) as if the aggregate of supplemental and normal wages were a single wage payment for the normal payroll period.

Example for Payment with Regular Wages:

A Maine employee, single with one allowance, is paid a \$1000 bonus on the same paycheck as his normal weekly earnings of \$500:

Normal Wages	\$500.00
Supplemental Wages	1,000.00
Total Wages	1,500.00
Annualized (x 52)	\$78,000.00
Annual Maine Tax	5,720.75
Tax to Withhold (/52)	110.01

For supplemental wages paid separately from normal wages, calculate withholding by aggregating supplemental wages with normal wages from the current payroll, if any, or from any preceding on-cycle confirmed payroll in the same calendar year. Using the annualized method, compute the tax on the combined total. Subtract the annualized tax on the normal wages. The de-annualized remainder is the withholding on the supplemental wages.

Example for Separate Payment:

A Maine employee, single with one allowance, is paid a \$1000 bonus as a separate check. No normal wages are paid in the current payroll. The employee's last previous on-cycle confirmed paycheck in the current year was for normal weekly earnings of \$500:

Normal Wage		Reg + Bonus
\$26,000.00	Annualize Gross Wages	\$78,000.00
1,300.75	Annual Tax	5,720.75
	Annualized Tax on Normal Wages	(1,300.75)
	Remainder	4,420.00
	Tax to Withhold on Bonus (/52)	85.00

Aggregate – No Tax else Percent

When supplemental wages are paid separately from normal wages, withholding depends on whether tax was withheld on:

- The employee's current payment of normal wages, if any.
- Previous on-cycle confirmed payment of normal wages to the employee in the same pay group in the same calendar year.

If no tax was withheld on either condition, calculate tax on supplemental wages using the Aggregate Method described previously for supplemental wages paid separately.

If tax was withheld on either condition, calculate tax using a flat percent rate as specified by the state, without regard for marital status or allowances.

Example:

A Connecticut employee, single with one allowance, is paid a \$1000 bonus as a separate check. The employee's last previous on-cycle normal paycheck in the current year was for normal weekly earnings of \$500, from which \$10.92 Connecticut tax was withheld. Using the flat rate of 4.5 percent specified by Connecticut, calculate the Connecticut tax to be withheld on the bonus:

$$4.5\% \times \$1000 = \$45$$

Percent of Taxable Gross

Calculate the tax to be withheld on supplemental wages by using the special flat rate specified by the state, without regard for marital status or allowances. For some states such as Arizona, this method uses a Percent of Federal Tax Withheld instead of a Percent of Taxable Gross.

This method may apply both to supplemental wages paid with normal wages and to supplemental wages paid separately.

Examples:

An employee subject to Indiana withholding is to be paid a \$4000 bonus. Using the flat rate of 3.4 percent specified by Indiana for supplemental wages, calculate the Indiana tax to be withheld on the bonus:

$$3.4\% \times \$4000 = \$136$$

As an example of a calculation using a Percent of Federal Tax Withheld instead of a Percent of Taxable Gross, an Arizona employee electing an Arizona withholding rate of 32 percent is paid a \$3000 bonus on which \$600 Federal tax is withheld. Calculate the Arizona tax to be withheld:

$$32\% \times \$600 = \$192$$

Note. For Arizona, the system uses Percent of FWT method, even though the value selected for Supplemental Method is *Percent of Taxable Gross*.

Non-resident Supplemental

When supplemental wages are paid separately from normal wages to a non-resident employee, calculate tax using a flat percent rate specified for non-residents, without regard for marital status or allowances.

Example:

A non-resident of Yonkers employed in Yonkers and subject to Yonkers tax is to be paid a \$2000 bonus as a separate payment. Using the flat rate of .5 percent specified by Yonkers for non-residents, calculate the Yonkers tax to be withheld on the bonus:

$$0.5\% \times \$2000 = \$10$$

Special Table with Exemptions

Louisiana only. The system uses the annual rate computed from the job record.

Special Table

For Georgia, West Virginia, and Wisconsin only. The system uses the annual rate computed from the job record.

Pages Used to View Federal and State Tax Information

Page Name	Object Name	Navigation	Usage
Federal/State Tax Table - General	STATE_TAX_TABLE1	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Tax Table	View standard deductions, allowance amounts, and supplemental rates.
Federal/State Tax Table - Special Tax Amounts	STATE_TAX_TABLE2	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Tax Table	View information needed for tax calculations. The page for the Federal Tax Table differs from the one for specific states.
Federal/State Tax Table - Rates	STATE_TAX_TABLE3	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Tax Table	View wage bracket information.
Federal/State Tax Table - Additional Rates	STATE_TAX_TABLE4	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Tax Table	View wage limits for unemployment and disability taxes.
Federal/State Tax - Run Control	PRCSRUNCNTRL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Federal/State Tax	Run TAX702 to print information from the State Tax Table and the State Other Tax Table, which store the most current tax rates and other parameters used in calculating state and federal withholding, disability, and unemployment taxes.
State Tax Rate - Run Control	PRCSRUNCNTRL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, State Tax Rate	Generate TAX707 that lists information from the State Tax Rate Table, which contains bracket rates needed for calculating state and federal taxes.

Viewing Standard Deductions, Allowance Amounts, and Supplemental Taxes

Access the Federal/State Tax Table - General page.

General		Special Tax Amts	Rates	Additional Rates
State: CA California				
State Tax Information Find View All First 1 of 1 Last				
*Effective Date:	01/01/2002	*Status:	Active	
*State Tax Calculation Type:	Graduated Tax Tbls-Allowances			
☐ FWT Credit ☐ Non-Resident Declaration Req ☐ Allow Withholding Reduction				
*FICA Credit:	No FICA			
Single Standard Deduction:	\$2,960			
Married Standard Deduction:	\$5,920			
Allowance Amount:	\$1,000			
Supplemental Method				
*Paid with Regular Wages:	Aggregate			
*Separate Payment:	Aggregate-No Tax else Percent			
Supplemental Wage Rate:	0.060000			

Tax Table - General page

Note. You shouldn't need to modify this table, but if you must, you can make changes if you have the appropriate security authorization. This applies to all pages in this component.

State Tax Calculation Type Indicates the type of withholding tax calculation required by the state.

FWT Credit This check box indicates whether credit is given for FWT during calculation of state income tax withholding.

Non-Resident Declaration Required This check box indicates whether the state requires a Non-Resident Declaration for non-resident employees.

Allow Withholding Reduction This check box indicates whether the state allows a reduction amount to be computed in the state withholding calculation. Currently, this only applies to Connecticut.

FICA Credit This check box indicates whether credit is given for FICA during calculation of state income tax withholding.

Supplemental Method

Details of the values available for selection in this group box and examples of calculations are provided in the overview of this section.

Paid With Regular Wages PeopleSoft delivers the required selection: *Aggregate – No Annualize, Aggregate, Aggregate-No Tax else Percent, Non-Resident Supplemental, Not Applicable, Percent of Taxable Gross, Special Table with Exemptions, and Special Table.*

Note. For Arizona, the system uses Percent of FWT method, even though the value shown in this field is Percent of Taxable Gross.

Separate Payment

PeopleSoft delivers the required selection: *Aggregate – No Annualize, Aggregate, Aggregate-No Tax else Percent, Non-Resident Supplemental, Not Applicable, Percent of Taxable Gross, Special Table with Exemptions, and Special Table.*

Note. For Arizona, the system uses Percent of FWT method, even though the value shown in this field is Percent of Taxable Gross.

See Also

Chapter 18, “Setting Up Payroll Tax Tables,” Understanding Supplemental Tax Calculations, page 314

Viewing Special Tax Amounts

Access the Federal/State Tax Table - Special Tax Amts page.

The screenshot displays the 'Special Tax Amts' page for California. The 'State' is set to 'CA' and 'California'. The 'Effective Date' is '01/01/2002' and the 'Status' is 'Active'. There are five 'Special Tax Amount' fields, each with a 'Description' field. The first three have values: 9811.000000 (Low Inc Exem), 19571.000000 (Low Inc Exem), and 79.000000 (Tax Crd). The fourth and fifth are empty. The 'State Statutory Minimum Hourly' is 6.750000. The '*Report Neg Wages' dropdown is set to 'Separate' and '*Tax Reporting' is set to 'Quarterly'. At the bottom, there are three checkboxes: 'Delay W/H for tips' (checked), 'Employee Detail Required' (checked), and 'Use Common PayMaster for SUI?' (unchecked).

Tax Table - Special Tax Amts page

Special Tax Amount

This field is used to store parameters or values used in state withholding tax calculations.

State Statutory Minimum Hourly

The system uses this field to calculate tip credit to pay overtime for tipped employees. The minimum hourly rate required by that state appears here.

Report Neg Wages

Options are *include* or *separate*.

State Tips W/H Threshold

This field appears if the value in the State field is \$U.

This field is used in conjunction with state regulations for delaying the withholding of taxes on tips until the employee reports monthly tips in the amount equal to the threshold amount. This field displays the monthly threshold amount from the federal regulations and as of now all states use that threshold amount.

For states that allow you to delay withholding on tips, you can specify by Pay Group whether you delay withholding on tips.

Tax Reporting

Options include *Annual*, *Monthly*, or *Quarterly*.

Delay Withholding for Tips

On this page, this check box refers to state income tax.

For each state, PeopleSoft selects or clears this check box, depending on whether the state allows employers to delay withholding on tip income until the monthly threshold amount is reached. For states that allow you to delay withholding on tips, you can specify by Pay Group whether you'll delay withholding on tips.

Employee Detail Required

This field is informational only and indicates whether a state requires the quarterly reporting of individual employee wage data. All states currently require such reporting.

Use Common PayMaster for SUI

This checkbox is selected if the state recognizes common paymaster status between companies for purposes of state unemployment insurance taxes.

Viewing Wage Bracket Rate Information

Access the Federal/State Tax Table - Rates page.

The screenshot displays the 'Tax Table - Rates' page for California. The page includes tabs for 'General', 'Special Tax Amts', 'Rates', and 'Additional Rates'. The 'Rates' tab is selected. The page shows 'State Tax Information' for California, with an 'Effective Date' of 01/01/2002 and a 'Status' of Active. Below this is a table of 'Tax Rates' with columns: *Tax Status, Low Gross, Low Tax, Tax Rate, and Credit Amount. The table lists various tax brackets and statuses, including 'Head Hous' and 'Married'. The first row shows a 'Head Hous' status with a Low Gross of \$51,350.00, a Low Tax of \$1,876.02, a Tax Rate of 0.093000, and a Credit Amount of 0.00. The table is paginated, showing 1-9 of 18 rows.

*Tax Status	Low Gross	Low Tax	Tax Rate	Credit Amount
Head Hous	\$51,350.00	\$1,876.02	0.093000	0.00
Head Hous	\$43,473.00	\$1,245.86	0.080000	0.00
Head Hous	\$35,126.00	\$745.04	0.060000	0.00
Head Hous	\$27,250.00	\$430.00	0.040000	0.00
Head Hous	\$11,500.00	\$115.00	0.020000	0.00
Head Hous	\$0.00	\$0.00	0.010000	0.00
Married	\$75,450.00	\$3,321.92	0.093000	0.00
Married	\$59,700.00	\$2,061.92	0.080000	0.00
Married	\$43,006.00	\$1,060.28	0.060000	0.00

Tax Table - Rates page

Tax Status

The appropriate Federal/State tax status (*Married*, *Single*, and so on.).

Low Gross

The minimum taxable gross for the bracket.

Low Tax

The tax to be withheld on the corresponding minimum gross.

Tax Rate

The rate to be applied until the next bracket is reached.

Credit Amount

Not currently used by PeopleSoft Payroll for North America.

Viewing Additional Rates Information

Access the Federal/State Tax Table - Additional Rates page.

The screenshot displays the 'Additional Rates' tab in the PeopleSoft Payroll system. At the top, there are tabs for 'General', 'Special Tax Amts', 'Rates', and 'Additional Rates'. Below these, the 'State' is set to 'CA' (California). The 'State Tax Information' section shows an 'Effective Date' of '01/01/2002' and a 'Status' of 'Active'. A 'Find | View All' button and navigation controls (First, 1 of 1, Last) are present. The 'Tax Classes' section lists three tax classes, each with a 'Max Tax' field and a 'Max Gross' field. The first class is 'OASDI/EE' with a 'Tax Rate' of '0.009000' and a 'Max Gross' of '46327'. The second class is 'Unempl ER' with a 'Max Gross' of '7000'. The third class is 'Vol Dis/EE' with a 'Max Gross' of '46327'. Each class has a 'Calculation Type' of '% Tax Grs' and a 'Tax Base' of 'Disability'. There are checkboxes for 'Period Maximum', 'Self Adjust', and 'Delay W/H for tips'.

*Tax Class	*Calculation Type	*Tax Base	Tax Rate	Max Gross
OASDI/EE	% Tax Grs	Disability	0.009000	46327
Unempl ER	% Tax Grs	Unemployr		7000
Vol Dis/EE	% Tax Grs	Disability		46327

Tax Table - Additional Rates page

Tax Class

Tax classes identify different taxes that share certain characteristics.

Occ Priv represents Occupational Privilege Tax (OPT) for Pennsylvania employees.

See [Chapter 18, "Setting Up Payroll Tax Tables," Understanding Federal and State Tax Information, page 313.](#)

Calculation Type

Options are *% Tax Grs*, *%ER Wage*, and *N/A*.

Tax Base

Options are *Disability*, *Unemployment*, and *Withholding*.

Tax Rate

The tax rate for employer unemployment or disability contributions is blank on this page. The rate used during payroll calculations comes from the Company State Tax table.

Max Gross

If a tax applies only to a portion of an employee's annual wages up to a specified limit, such as employer unemployment taxes, that limit amount appears in this field. An entry of all 9s, as with Medicare taxes, indicates a tax without limit.

Period Maximum

If selected, this option indicates that the tax is calculated for a period other than annual. Two examples of this are SDI in New York and Hawaii, both of which have weekly maximums.

Delay W/H for Tips	On this page, this check box is selected or cleared for each additional tax the state may impose. For each state, PeopleSoft selects or clears this check box, depending on whether the state allows employers to delay withholding on tip income until the monthly threshold amount is reached. For states that allow you to delay withholding on tips, you can specify by Pay Group whether you'll delay withholding on tips.
Self Adjust (self-adjusting)	This check box indicates that a tax is self-adjusting in the system. Each time payroll is processed for an employee, the system makes any necessary adjustment to ensure that the employee's YTD tax amount is the correct percentage of the YTD taxable gross amount. Examples include social security, Medicare, and unemployment taxes. Withholding taxes are never self-adjusting.
Max Tax (maximum tax)	If there is an annual limit on a particular type of tax, such as Pennsylvania's occupational privilege taxes, enter that limit amount here.
EE/ER Both	This field indicates whether a tax is paid by the employee, paid by the employer, or paid in equal matching amounts by both.

Pennsylvania Limit on Occupational Privilege Tax

On the Federal/State Tax Table - Additional Rates page, the Tax Class *Occ Priv* represents Occupational Privilege Tax (OPT) for Pennsylvania employees. The state of Pennsylvania requires an employer to deduct this tax class only one time annually. If an employee moves from one locality to another midyear, the employee should not be taxed an additional OPT tax amount in the new locality until the next year. To keep track of how much Pennsylvania OPT tax an employee has paid, there exists a state level Pennsylvania OPT Memo tax record. The sole purpose of this tax record is to keep track of how much Pennsylvania tax an employee has paid for the year *regardless* of the Pennsylvania locality. During the OPT tax calculation, a check is made against this state Memo tax balance before the local OPT tax is computed.

Note. Pennsylvania's OPT is withheld as an annual fixed amount. When you hire an employee who has already paid OPT for the current tax year, you should adjust the employee's tax balance for the tax year. This prevents the system from withholding OPT from that employee's pay twice in one year.

The Payroll calculation process determines the Pennsylvania OPT limit by Employee ID. Adjust an employee's memo balance for PA OPT, select on the Adjust Tax Balance pages.

See *PeopleSoft 8.8 Payroll for North America PeopleBook*, "Reviewing, Adjusting, and Deleting Employee Balances," (USA) Reviewing and Adjusting U.S. Tax Balances.

Voluntary Disability Plans

Of the states that provide disability insurance plans (currently California, Hawaii, New Jersey, New York, Rhode Island, plus Puerto Rico) all but Rhode Island allow employers to provide voluntary disability plans in place of the state plan. PeopleSoft maintains the Tax Class rows on the Federal/State Tax Table - Additional Rates page for the Employer and Employee paid tax for voluntary disability plans for each of these states.

Note. If you implement a voluntary disability plan for California, Hawaii, New Jersey, New York, or Puerto Rico, you must set up the appropriate tax rates on the Company State Tax table and the VDI Administrator table.

State Unemployment Insurance (SUI) Tax

You must make sure that the unemployment insurance taxable gross and tax balances transferred during the conversion process are consistent with the unemployment tax rates that have been entered for each quarter on the Company State Tax Table page.

Warning! If these amounts are not consistent and in balance, the system will either charge or refund additional unemployment tax amounts to account for the difference in the quarterly unemployment insurance tax balances.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Entering Employee Payroll Processing Data

Chapter 18, “Setting Up Payroll Tax Tables,” Defining States Where You Collect or Pay Taxes , page 343

(USA) Updating Local Tax Information

This section provides an overview of locality codes and discusses how to:

- View information about the geographic area local tax jurisdiction(s) associated with locality codes.
- View the method used to calculate local withholding rates.
- Enter a locality’s tax reporting requirements.

Understanding Locality Codes

The Local Tax Table pages display information used when the system calculates local withholding tax. In this table, each locality is assigned a code of up to ten characters. Typically this is how these codes are assigned:

- For Pennsylvania municipalities and school districts: an eight or nine character code based on codes assigned in the official Pennsylvania local tax register.
- For municipalities in states other than Pennsylvania: a five-character Federal Information Processing Standards (FIPS) code.
- For counties: a three-digit county number.
- For Ohio school districts: a four-digit district number.

Pages Used to Update Local Tax Information

Page Name	Object Name	Navigation	Usage
Local Tax Table 1	LOCAL_TAX_TABLE1	Set Up HRMS, Product Related, North American Payroll, Local Taxes, Tax Table	View information about the geographic area associated with a locality code.
Local Tax Table 2	LOCAL_TAX_TABLE2	Set Up HRMS, Product Related, North American Payroll, Local Taxes, Tax Table	View the method used to calculate local withholding taxes, tax rates, and other constants.
Local Tax Table 3	LOCAL_TAX_TABLE3	Set Up HRMS, Product Related, North American Payroll, Local Taxes, Tax Table	Enter data on the locality's tax reporting requirements.
Local Tax - Run Control	PRCSRUNCNTRL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Local Tax	Run TAX703 to print information from the Local Tax Table, which contains calculations for local income taxes.

Viewing Local Tax Jurisdiction Information Associated With a Locality Code

Access the Local Tax Table 1 page.

The screenshot displays the 'Local Tax Table 1' page. At the top, there are tabs for 'Local Tax Table1', 'Local Tax Table2', and 'Local Tax Table3'. Below the tabs, the 'State' is set to 'PA Pennsylvania' and the 'Locality' is '006601'. The 'Local Tax Information' section includes a 'Find | View All' button and a '1 of 1' indicator. The '*Effective Date' is '01/01/1900' and the '*Status' is 'Inactive'. The 'Maintenance Responsibility' section has two radio buttons: 'Customer' and 'PeopleSoft' (which is selected). The 'Local Jurisdiction' is set to 'Municipal' and there is a checkbox for 'Partial Indicator (PA only)'. Below these, there are input fields for 'Locality Name' (ALBURTIS BOROUGH), 'County' (LEHIGH), 'Other Locality Name', 'Other Locality Short Name', and 'School dist code (PA only)'.

Local Tax Table1 page

Maintenance Responsibility All entries that we supply are marked as the maintenance responsibility of PeopleSoft. However, if you add a locality to this table, the system marks it as your maintenance responsibility.

Local Jurisdiction The name of the local tax jurisdiction appears here.

Partial District Indicator (PA Only)	This check box is selected for any Pennsylvania Locality where a single school district applies to multiple municipalities.
Locality Name	The municipality name from the register (except for school district entries, which are school district name). Combined jurisdictions have the appendage M+SD.
Other Locality Name	For Pennsylvania localities, combined entries display the school district name.
School District Code (PA Only)	For Pennsylvanian localities, the appropriate school district code appears here.

Pennsylvania Localities

The State of Pennsylvania provides a registry of tax rates for all cities, counties, political subdivisions, school districts, and so on located in Pennsylvania. For each municipality and overlying school district, the registry lists effective tax rates for both Earned Income Tax (EIT) and Occupational Privilege Tax (OPT) for residents and, where applicable, non-residents.

For each municipality and overlying school district, PeopleSoft delivers the following locality types:

- For Combined Municipality and School District Earned Income Tax, the locality is identified by the letter “I” for income and the six-character locality code from the Pennsylvania Register, followed by the letter “C” for combined. For example, I123456C.
- For Municipality Earned Income Tax, the locality is identified by the letter “I” for income and the six-character locality code from the Pennsylvania Register, followed by the letter “M” for municipal. For example, I123456M.
- For School District Earned Income Tax, the locality is identified by the letter “I” for income and the six-character locality code from the Pennsylvania Register, followed by the letter “S” for school district. For example, I123456S.
- For Combined Municipality and School District Occupational Privilege Tax, the locality is identified by the letter “O” for occupational privilege and the six-character locality code from the Pennsylvania Register, followed by the letter “C” for combined. For example, O123456C.
- For Municipality Occupational Privilege Tax, the locality is identified by the letter “O” for occupational privilege and the six-character locality code from the Pennsylvania Register, followed by the letter “M” for municipal. For example, O123456M.
- For School District Occupational Privilege Tax, the locality is identified by the letter “O” for occupational privilege and the six-character locality code from the Pennsylvania Register, followed by the letter “S” for school district. For example, O123456S.

Note. When a municipality overlaps all or portions of multiple school districts, the locality codes may have a numerical sequence suffix added on to them. For example: I123456C1, I123456C2, I123456M1, I123456M2, and so on.

Viewing the Method to Calculate Local Withholding Taxes

Access the Local Tax Table 2 page.

Local Tax Table1 Local Tax Table2 Local Tax Table3

State: PA Pennsylvania

Locality: 006601

Local Tax Information Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 Inactive

Locality Name: ALBURTIS BOROUGH

*Local Tax Calculation Rtx TaxGr ☐ Withhold On Work Locality Only

Type: Graduated Tax Table ☐

Code:

Tax Rate

Resident:	0.010000
Nonresident:	0.010000

*Tax Class: Withholding

Low Gross:

Minimum Tax:

Maximum Tax:

Annual Exemption:

Local tax Table2 page

- Local Tax Calculation Type** Indicates the calculation method used to determine the amount of local income tax withheld.
- Withhold On Work Locality Only** When this check box is selected for a locality, only wages earned in that locality are considered taxable for residents of the locality. No resident tax is withheld from wages paid for work performed outside of the locality.
- Graduated Tax Table Code** This option takes effect if the locality requires that tax tables be referenced during calculation, as do New York City, Yonkers, and Maryland counties. In this case, the graduated tax table code entered here links the record to the appropriate entry in the PeopleSoft Federal/State Tax table where the graduated tax rates are stored.
- Tax Rate**
- Resident** This field displays the tax rate for residents of the locality.
- Nonresident** This field displays the tax rate for nonresidents in the locality.

Adding Tax Localities

For each locality PeopleSoft supports, we maintain the entries for that locality in the following tables:

- Local Tax table.
- Local Tax Reciprocity table (if applicable).
- Taxable Gross Definition table (GTL, 401k, and 125 only) (if applicable).

Entering a Locality's Tax Reporting Requirements

Access the Local Tax Table 3 page.

Local Tax Table1 Local Tax Table2 Local Tax Table3

State: PA Pennsylvania

Locality: 006601

Local Tax Information Find | View All First 1 of 1 Last

*Effective Date:

Tax Reporting

Locality Short Name:

Tax Reporting: Quarterly ☐ Employee Detail Required on tax reports

W2 Print Name:

W2 Mag Media Code:

Local Tax Table3 page

Tax Reporting

Displays the interval required by the locality for tax reporting, *Monthly*, *Quarterly*, or *Annual*.

Important! If you add a locality, you are responsible for maintaining the entries on these tables for the new locality until PeopleSoft incorporates it into a tax update. Contact your Global Support Center if you discover any localities not listed or any errors so we can include the addition or correction in the next PeopleSoft Payroll Tax Update.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Accessing Year-End Processing Instructions”

(USA) Working With Tax Reciprocity

This section discusses how to:

- View state withholding tax reciprocity rules.
- View local withholding tax reciprocity rules.
- Define reciprocal rules between work localities.

Pages Used with State Tax Reciprocity

Page Name	Object Name	Navigation	Usage
State Tax Reciprocity Table	STATE_TX_RECIP_TBL	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, State Tax Reciprocity Table	Display the rules used during payroll calculation to determine withholding liability when an employee lives in one state and works in another.
State Reciprocity Rules - Run Control	PRCSRUNCNTRL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, State Reciprocity Rules	Run TAX708 to print a summary of the rules that determine where to withhold income taxes when an employee works in one state and lives in another.
Local Tax Reciprocity Table	LOCL_TX_RECIP_TBL	Set Up HRMS, Product Related, North American Payroll, Local Taxes, Tax Reciprocity Table	View reciprocal agreements between an employee's state of residence and a locality of employment.
Local Reciprocity Rules - Run Control	PRCSRUNCNTRL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Local Reciprocity Rules	Run TAX709 to print a list of the rules that determine where to withhold income taxes when an employee works in one locality and lives in another.
Local Work Work Reciprocity Table	LOCLWK_TXRCP_TABLE	Set Up HRMS, Product Related, North American Payroll, Local Taxes, Work Reciprocity	Establish reciprocal agreements between work localities.
Work - Work Reciprocity Rules - Run Control	PRCSRUNCNTL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Work-Work Reciprocity Rules	Run TAX713 to print the reciprocal rules that determine local income tax withholding when an employee works in a location that has multiple taxing jurisdictions that share a reciprocal agreement.

Viewing State Tax Reciprocity Withholding Liability Rules

Access the State Tax Reciprocity Table page.

State Tax Reciprocity Table	
State of Residence:	CA California
State of Employment:	
State Tax Reciprocity Information Find View All First 1 of 1 Last	
*Effective Date:	01/01/1988
*Status:	Active
☒ SUT credit when employee transfers to residence state	
Reciprocity Rule ☐ Withhold on total wages in both states ☒ Calculate residence states's withholding on total wages. Then reduce the withholding by work state's withholding ☐ Calculate residence state's withholding on total wages. Then factor the withholding by the percentage of wages earned in the residence state ☐ Reduce total wages by taxable wages earned in all work states. Then calculate residence state's withholding on these reduced wages. ☐ Do not withhold for the work state if the employee is taxed by residence state ☐ Special - MD works in DE	

State Tax Reciprocity Table page

SUT Credit when employee transfers to residence state

When selected, this check box indicates that, for unemployment tax purposes, the (residence) state allows credit against its state unemployment taxable wage base for wages paid to an employee in another state.

Reciprocity Rule

This field displays the rule applied to the residence/ employment state combination.

Although the employee's residence state may require withholding on all wages paid to the employee, many states provide credit for taxes paid by their residents to another state. Many other examples of reciprocity agreements also exist between states. Under these agreements, wages earned in a work state that has an agreement with the residence state are taxed by, and taxes withheld are submitted to, the employee's residence state.

This table doesn't identify every state-to-state combination individually because most states have a single rule for dealing with residents who earn taxable wages in other states. The default reciprocity rule between a state of residence and all other states of employment is the one in which the State of Employment field is blank.

If you need to modify these table entries, consult the PeopleSoft Global Support Center.

Note. If you're a multi-state employer, review the rules in this table, particularly if you can be considered a non-resident employer for certain employees. For example, Alabama requires that resident employers withhold Alabama tax on wages earned both inside and outside the state by Alabama residents. Non-resident employers must withhold on only those wages earned in Alabama, regardless of where the employee resides. The entries in the State Tax Reciprocity table—as delivered by PeopleSoft—assume that you are a resident employer in each state.

Viewing Local Tax Reciprocity Rules

Access the Local Tax Reciprocity Table page.

Local Tax Reciprocity Table

State of Residence: OH Res Loc: \$DFLT

State of Employment: OH Empl Loc: \$DFLT

Local Tax Reciprocity Information

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

+ -

Reduce by x Percent: 100.00

Credit Limit Rate:

Reciprocity Rule

☐ Withhold on total wages in both localities.
 ☒ Calculate resident local tax on total wages, then reduce by credit reduction percentage of work local tax with reduction not to exceed credit limit.
 ☐ Calculate work locality's withholding on work locality's wages, Then reduce withholding by percentage of residence locality's withholding
 ☐ Reduce Total wages by taxable wages earned in all work localities. Then calculate residence withholding on these reduced wages.
 ☐ Do not withhold for the work locality if the employee is taxed by residence locality
 ☐ Calculate residence locality's withholding on total wages. Then reduce withholding by work locality's withholding rate as applied to residence locality's definition of taxable wages

Local Tax Reciprocity Table page

When the residence locality differs from the employment locality, the system calculates both taxes and applies the reciprocity rule from this table to produce the correct net withholding for the employee in each locality.

Res Loc (ResidenceLocality) The ID corresponding to the employee's locality of residence. This table does not identify every residence/employment combination, because most localities in a given state follow the same rule. The table entry for the default value, *\$DFLT*, is used when there is no individual entry. Any exceptions require separate entries and act as overrides.

Entries that identify reciprocity agreements between a state of residence and employment localities are special cases. The residence state is specified as usual, but the value in this field is a special code: *STATERC*.

Empl Loc (Employment Locality) The ID corresponding to the employee's locality of employment. This table does not identify every residence/locality combination, because most localities in a given state follow the same rule. The table entry for the default value, *\$DFLT*, is used when there is no individual entry. Any exceptions require separate entries and act as overrides.

Reduce by x Percent The maximum portion of the work locality's tax rate which can qualify as a credit against the resident locality's withholding.

Credit Limit Rate The maximum portion by which the resident locality's tax rate can be reduced by a credit for the work locality's withholding.

Reciprocity Rule

Displays the rule applied to the residence/ employment locality combination.

Defining Reciprocal Agreements Between Work Localities

Access the Local Work Work Reciprocity Table page.

Local Work Work Reciprocity

State of Employment: KY Kentucky

Locality of Employment: 145 MCCracken CO

State of Other Jurisdiction: KY Kentucky

Locality of Other Jurisdiction: 58836 PADUCAH

Local Work Tax Reciprocity Information

Find | View All

First 1 of 1 Last

*Effective Date: 01/01/1990

*Status: Active

Reduce Percent: 100.00

Reciprocity Rule

☐ Withhold on total wages in both localities.

☒ Calculate work locality's withholding on work locality's wages, Then reduce withholding by percentage of other jurisdiction's withholding.

Local Work Work Reciprocity page

State of Other Jurisdiction

The state of other jurisdiction for each record represents the state of the primary local tax jurisdiction. That is, the state of the local tax jurisdiction whose tax must be withheld in full.

Locality of Other Jurisdiction

This represents the primary tax jurisdiction. That is, the jurisdiction whose tax must be withheld in full.

Reduce Percent

Where allowed, this represents a percent of other jurisdiction withholding to be credited toward the withholding amount required by the locality of employment. This is not always 100%. PeopleSoft displays the percent of credit reduction allowed.

Reciprocity Rule

This field displays the rule applied to the residence/ employment locality combination.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Maintaining Payroll Data”

(USA) Updating the Taxable Gross Definition Table

This section provides an overview and discuss how to update the Taxable Gross Definition table.

Understanding the Taxable Gross Definition Table

The Taxable Gross Definition table defines the taxability for specific earnings or deduction types that must be treated differently at the state or local level than at the federal tax level. Taxing jurisdictions may have different rules as to whether a given type of earnings or deduction should be taxed.

PeopleSoft Payroll tracks these differences in taxability by documenting where the taxable wage definition of a particular jurisdiction differs from a standard definition for the following basic payroll tax types:

- Withholding
- Unemployment
- Disability

For each of these tax types, certain earnings and deductions are taxable at the state or local level, while others are not. What is taxable differs for each tax, so we have a separate standard definition for each type. Because most states and localities follow federal guidelines for taxing earnings, we use Federal income tax withholding, Federal unemployment, and FICA as the standard taxes from which to develop these rules.

The system automatically maintains federal taxable grosses, FWT, FICA, and FUT, based on entries in the Earnings table and Deduction table:

Deduction Table	Earnings Table
Deduction classification = Taxable	Subject to FWT
Effect on FICA gross	Subject to FICA
Effect on FUT gross	Subject to FUT

Normally, the system calculates state and local taxes using the following taxable grosses:

To Calculate	Payroll Uses
State withholding taxes (SWT)	FWT gross
State unemployment taxes (SUT)	FUT gross
State disability insurance (SDI)	FUT gross
Local withholding taxes (LWT)	FWT gross

Why do we use the FUT gross as the starting point for SDI? Most states do not publish any separate definition of subject wages for SDI. Instead, states treat the definition of wages for SDI purposes as the same as the definition of wages for SUI purposes. Since SUI wages are based on FUT wages, and SDI subject wages are the same as SUI wages, FUT is the starting point for determining both SUI and SDI wages.

You can override or establish exceptions to the federal definitions of taxable gross for the following taxable grosses:

- State withholding
- State unemployment
- State disability
- Local withholding

When a state or locality declares that taxability of a certain earnings or deduction is different from one of these federal standards, a rule must be placed in the Taxable Gross Definition table indicating the deviation. The system uses the rules stored in the Taxable Gross Definition table to adjust the taxable gross for the states and localities that deviate from the federal norm.

For each of these taxable gross definitions, identify a Taxable Gross Component ID and assign it to the various states or localities affected.

What PeopleSoft Provides

PeopleSoft supplies entries on this table for 401(k), Section 125, and group-term life taxable gross definitions. You maintain any taxable gross definitions that you add.

For Section 125 cafeteria plans, the taxable gross definitions are for employee deductions only. You may have to set up your own entries to process specific parts of your plan. In some states, the taxability of deductions depends on whether the employee has the option of receiving cash.

Review the definitions in this table carefully with regard to your particular 125 plans.

Note. These pages are delivered as display-only. If you want to add or modify a Taxable Gross Definition, you must have the appropriate security authorization to adjust your standard record definitions.

How Taxable Gross Definitions Affect Earnings and Deductions

The standard definition of taxability of an earnings or deduction type is determined by entries on the Earnings and Deduction tables. When establishing an entry on these tables, you specify if the earning or deduction is to be taxed for FWT, FUT, and FICA. Any earnings and deductions you marked as taxable are totaled during payroll processing to determine an employee's taxable gross for each of the standard tax types. For earnings or deduction types that increase or decrease the state or local taxable grosses compared to the federal taxable gross, enter a Taxable Gross Component ID that identifies which rules on the Taxable Gross Definition table to use.

For example, Pennsylvania considers employee before-tax 401(k) contributions taxable for state withholding, whereas they are not taxed at the federal level. Therefore, we must have a Taxable Gross Definition for 401(k) deductions that indicate to the Payroll calculation programs that when taxable gross for withholding is determined, 401(k) deductions should be included as earnings for Pennsylvania (but not for federal) withholding purposes.

Pages Used to Update the Taxable Gross Definition Table

Page Name	Object Name	Navigation	Usage
Taxable Gross Definition Tbl (taxable gross definition table)	TAXGR_DEFIN_TBL	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Taxable Gross Definition	Set up a Section 125 definition.
Taxable Gross Definition Tbl - Run Control	PRCSRUNCNTRL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Taxable Gross Definition Tbl	Run TAX706 to print information from the Taxable Gross Definition Table, which contains definitions that the system uses during payroll calculation to determine state and local taxable grosses that deviate from the normal federal withholding. It specifies the base for taxable gross and indicates modifications to that base.

Setting Up a Taxable Gross Definition

Access the Taxable Gross Definition Tbl page.

The screenshot displays the 'Taxable Gross Definition Tbl' page. At the top, there's a header bar with the page title. Below it, the 'State' is set to 'CO' (Colorado) and 'Locality' is '\$DFLT'. The 'Taxable Gross Definition Table' section includes fields for '*Effective Date' (01/01/1900), '*Status' (Active), and '*Taxable Gross' (Withholding). The 'Adjustment to Base Gross' section shows '*Taxable Gross Component ID' (125), a checked box for 'Withholding Follows Fed Rules', 'Plan Type' (empty), '*Tax Gross Effect' (Adds To), and 'Deduction Code' (\$DFLT). Navigation controls like 'Find', 'View All', 'First', 'Last', and '1 of 1' are visible at the top of each section.

Taxable Gross Definition Tbl page

Taxable Gross

Taxable Gross

Select *Disability*, *Unemployment*, or *Withholding* to identify the type of taxable gross you're defining.

Base Gross

Select either *FUT* (Federal Unemployment Tax) for unemployment and disability, or *FWT* (Federal Withholding Tax) for withholding. (FICA is not currently used as a base gross.)

Adjustment to Base Gross

This scroll area lists the specific components for which adjustments are necessary.

Taxable Gross Component ID The taxable gross component ID you specify must be unique in what it represents (e.g., 401K, GTL, 125, and so forth). If it is not unique, it can cause the taxable grosses to be incorrect.

Tax Gross Effect This field controls the effect on the gross. It can either add to the gross, subtract from it, or have no effect.

Note. Pennsylvania does not recognize certain before-tax benefits deductions. It requires specific before-tax deductions to be included in taxable gross wages. You can identify these plans to the system by Plan Type and Deduction Code on the Taxable Gross Definition record for Pennsylvania. These fields pertain to Pennsylvania only.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Deductions”

(USA) Entering a State’s Marital Status Codes

This section discusses how to enter a state’s marital status codes.

Pages Used to Enter a State’s Marital Status Codes

Page Name	Object Name	Navigation	Usage
SWT Marital Status Table	SWT_MAR_STATUS_TBL	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, SWT Marital Status Table	Enter a state’s marital status codes.
SWT Marital Status Codes - Run Control	PRCSRUNCNTRL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, SWT Marital Status Codes	Print information from the Marital Codes Status Table, which contains all valid marital status codes, sorted by state.

Defining a State’s Marital Status Codes

Access the SWT Marital Status Table page.

SWT Marital/Tax Status The State Withholding tax marital tax status. It is used in the employee’s state tax data.

(CAN) Viewing Canadian Tax Information

This section provides an overview of defining Canadian tax information and discusses how to:

- View the constant values required for calculation of contributions to Canada and Quebec pension plans and premiums for employment insurance.
- View the wage thresholds and rates for calculating Canadian federal surtax.
- View the rates, thresholds, and constants to determine withholding of Canadian provincial taxes.
- Display by province the net claim amount threshold and tax reduction amount.

Understanding Canadian Tax Tables

The Canadian Tax tables are used during payroll calculation to compute all federal, provincial, and Quebec taxes. Because these tables are maintained largely by PeopleSoft and updated based on the standards outlined in the Canada Customs and Revenue Agency (CCRA) publication Payroll Deductions Formulas for Computer Programs and the Revenu Quebec publication Guide for Employers: Source Deductions and Contributions, you shouldn't need to modify them. However, you can make changes using the Canadian Tax Table pages if you have the appropriate security authorization.

Pages Used to View Canadian Tax Information

Page Name	Object Name	Navigation	Usage
Canadian Tax Table - CPP/QPP EI	CAN_TAX_TABLE1	Set Up HRMS, Product Related, North American Payroll, Canadian Taxes, Tax Table	Display the constant values required for calculation of contributions to Canada and Quebec Pension Plans and premiums for Employment Insurance. PeopleSoft maintains this table for you.
Canadian Tax Table - Tax Credits, Rates, and Other	CAN_TAX_TABLE4	Set Up HRMS, Product Related, North American Payroll, Canadian Taxes, Tax Table	Display the wage threshold and rates for calculating Canadian federal surtax.
Canadian Tax Table - Provincial Rates	CAN_TAX_TABLE2	Set Up HRMS, Product Related, North American Payroll, Canadian Taxes, Tax Table	Display rates, thresholds, and constants needed to determine withholding of Canadian provincial taxes, including withholding, health insurance, and sales taxes.
Canadian Tax Table - Provincial Tax Thresholds	CAN_TAX_TABLE3	Set Up HRMS, Product Related, North American Payroll, Canadian Taxes, Tax Table	Display by province the net claim amount threshold and tax reduction amount. Note that this page does not affect all provinces. PeopleSoft maintains this table for you.

Viewing the Wage Thresholds and Rates for Calculating Canadian Federal Surtax

Access the Canadian Tax Table - Tax Credits, Rates, and Other page.

CPP/QPP and EI		Tax Rates, Credits and Other		Provincial Rates		Provincial Tax Thresholds													
Tax Credits, Rates & Other																			
		Find View All		First		1 of 1 Last													
*Effective Date:		07/01/2002																	
▼ Federal <table> <tr> <td>Federal Basic Personal Amount:</td> <td>7634.00</td> </tr> <tr> <td>Excess Surtax Threshold (T3):</td> <td>9999999.99</td> </tr> <tr> <td>Basic Rate (Annualized):</td> <td>0.00000</td> </tr> <tr> <td>*Excess Rate (Annualized):</td> <td>0.05000</td> </tr> <tr> <td>*Basic Rate (Cumulative):</td> <td>0.01500</td> </tr> <tr> <td>*Excess Rate (Cumulative):</td> <td>0.05000</td> </tr> </table>								Federal Basic Personal Amount:	7634.00	Excess Surtax Threshold (T3):	9999999.99	Basic Rate (Annualized):	0.00000	*Excess Rate (Annualized):	0.05000	*Basic Rate (Cumulative):	0.01500	*Excess Rate (Cumulative):	0.05000
Federal Basic Personal Amount:	7634.00																		
Excess Surtax Threshold (T3):	9999999.99																		
Basic Rate (Annualized):	0.00000																		
*Excess Rate (Annualized):	0.05000																		
*Basic Rate (Cumulative):	0.01500																		
*Excess Rate (Cumulative):	0.05000																		
▼ Quebec <table> <tr> <td>Quebec Basic Personal Amount:</td> <td>8685.00</td> </tr> <tr> <td>Deduction for Employment Rate:</td> <td>0.00000</td> </tr> <tr> <td>Deduction for Employment Max:</td> <td>0.00</td> </tr> <tr> <td>*Cumulative Net Claim Credit Rt:</td> <td>0.20000</td> </tr> </table>								Quebec Basic Personal Amount:	8685.00	Deduction for Employment Rate:	0.00000	Deduction for Employment Max:	0.00	*Cumulative Net Claim Credit Rt:	0.20000				
Quebec Basic Personal Amount:	8685.00																		
Deduction for Employment Rate:	0.00000																		
Deduction for Employment Max:	0.00																		
*Cumulative Net Claim Credit Rt:	0.20000																		

Tax Rates, Credits, and Other page (1 of 3)

Other

Goods and Services Tax Percent:

7.00

Wage Claim Protection Percent:

0.000

RPP/RRSP Limit (F Factor):

13500.00

Labor Sponsored Funds (LCF)

Maximum Credit:

750.00

LCF Rate:

0.15000

Federal Income Tax Rates

Federal (CIT) Rates

Customize | Find | View All | 

First  1-3 of 4  Last

Annual Taxable Income (A)	*Federal Tax Rate (R)	Federal Constant (K)		
103000.00	0.29000	7525.00		
63354.00	0.26000	4435.00		
31677.00	0.22000	1901.00		

Federal (CIT) Lump-Sum Rates

Customize | Find | View All | 

First  1-3 of 3  Last

Lump-Sum Payment	*Taxation Rate	*Taxation Rate (Quebec)		
15000.00	0.30000	0.15000		
5000.00	0.20000	0.10000		
0.00	0.10000	0.05000		

Tax Rates, Credits, and Other page (2 of 3)

Quebec Income Tax Rates

Quebec (QIT) Rates Customize | Find | View All |  First ◀ 1-3 of 3 ▶ Last

Annual Taxable Income (I1)	Provincial Tax Crdt Factor (R1)	Provincial Constant (K1)	*Taxation Rate (T)		
53405.00	0.00000	3204.20	0.24000	+	-
26700.00	0.00000	1068.00	0.20000	+	-
0.00	0.00000	0.00	0.16000	+	-

Quebec (QIT) Lump-Sum Rates Customize | Find | View All |  First ◀ 1-2 of 2 ▶ Last

Lump-Sum Payment	*Taxation Rate		
5000.00	0.20000	+	-
0.00	0.16000	+	-

Tax Rates, Credits, and Other page (3 of 3)

Other Rates

RRP/RRSP Limit (F factor) This field is used during the calculation of Canadian income taxes subject to the commission tax method.

Labor Sponsored Funds (LCF)

Maximum Credit This field displays the monetary amount to be applied to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC). The federal tax credit is limited to the lesser of the maximum credit and the LCF Rate. The system applies this credit to each participating employee, according to the LCF Amount you enter on the employee's Canadian Income Tax Data page.

LCF Rate This field displays the percentage to be applied to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC). The federal tax credit is limited to the lesser of the maximum credit and the LCF rate. The system applies this credit to each participating employee according to the LCF Amount you enter on the employee's Canadian Income Tax Data page.

Viewing the Rates, Thresholds, and Constants to Determine Withholding of Canadian Provincial Taxes

Access the Canadian Tax Table - Provincial Rates page.

Provincial Rates

*Effective Date: 07/01/2002

Provincial Rates

*Province: AB

Surtax Rate (V1A): 0.00000

Surtax Rate (V1B): 0.00000

Constant (N1): 0.0000

Tax Reduction (S): 0.00

Maximum LCP Credit: 0.00

Health Insurance Rate: 0.000000

Provincial Sales Tax: 0.00

Harmonized Sales Tax: 0.00

Tax Credit Rate (K1P): 0.10000

Threshold Amount (V1A): 0.00

Threshold Amount (V1B): 0.00

Constant (N2): 0.00

WCB Limit: 58000.00

LCP Rate: 0.00000

Payroll Tax Rate: 0.0000

Prov. Sales Tax - Insurance: 0.00

*Stats Can Province Code: 84821

Basic Tax Credit Amt (TCP): 13339.00

Tax Rates

Annual Taxable Income (A)	Prov. Tax Rate (V)	Prov. Constant (KP)
0.00	0.10000	0.00

Provincial Rates page

Maximum LCP Credit

For provinces where provincial labor-sponsored venture tax credits are available, you maintain the maximum LCP credit amount to be applied for that province on this table. This applies to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC).

LCP Rate

For provinces where provincial labor-sponsored venture tax credits are available, you maintain the LCP rate to be applied for that province on this table. This applies to employee purchases of shares in Labour Sponsored Venture Capital Corporations (LSVCC).

Health Insurance Rate

You override the default health insurance rate on the Canadian Company Tax table.

See Also

Chapter 18, "Setting Up Payroll Tax Tables," *Defining Canadian Company Tax Information*, page 363

(USA) Establishing Company State Taxes

This section discusses how to:

- Define an entry in the Company State Tax table for each state where you collect or pay taxes.
- Establish the voluntary disability plans associated with the company.

- Enter your general ledger account numbers for state taxes.

Pages Used to Establish Company State Taxes

Page Name	Object Name	Navigation	Usage
Company State Tax Table - General	CO_STATE_TAX_TBL	• Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Company State Tax Table • Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Agency State Tax Table USF	Set up an entry in the Company State Tax Table for each state where your organization collects or pays taxes.
Company State Tax Table - VDI	CO_STATE_TAX_TBL2	• Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Company State Tax Table • Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Agency State Tax Table USF	Establish the voluntary disability plans associated with the company.
Company State Tax Table - GL Accounts	CO_STATE_TAX_TBL3	• Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Company State Tax Table • Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Agency State Tax Table USF	Enter your general ledger account numbers for state taxes.
Company State Tax - Run Control	PRCSRUNCNTRL	• Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Company State Tax • Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Agency State Tax USF	Run TAX704 to print information from the Company State Tax Table, which identifies the states in which your company collects and pays taxes.

Defining States Where You Collect or Pay Taxes

Access the Company State Tax Table - General page.

General		VDI	GL Accounts
Company:	BN1	Company BN1	
State:	CA	California	
Company State Tax Information Find View All First 1 of 1 Last			
*Effective Date:	01/01/1980	*Status:	Active
State Withholding			
Employer ID:	94-1111111	☐ Non-Resident Declaration Req	
State Unemployment			
☐ Exempt From SUT			
Employer ID:	49-1111111	☐ Override	
Experience Rate:		(%)	Health Ins Rate (MA only):
Effective Yr/Qtr:			Branch Code:
State Disability			
☐ Exempt From ER Disability			
Experience Rate:		(%)	Effective Tax Yr/Qtr:
Employer ID:			

Company State Tax Table - General page

The State field in State Tax Data 1 and Local Tax Data is edited against this table. You must create entries in this table before entering any state and local tax information for your employees.

State Withholding

Employer ID

Enter your state employer ID for state withholding.

Non-Resident Declaration Req

This check box is selected or cleared by default according to the Federal/State Tax Table 1 record for the state. Indicates whether the state requires a Non-Resident Declaration for non-resident employees.

State Unemployment

Exempt From SUT

Select this check box if the company is not required to pay SUT for this state. Use this option if you've specified, on the Company table, that the company as a whole is not exempt from SUT. If you select it here, Exempt from SUT becomes the default at the employee level; employees hired in this state have this check box selected on Maintain Payroll Data, State Tax Data 2.

Employer ID

Enter your state employer ID for state unemployment.

Experience Rate

The experience rate you enter in the State Unemployment group box should reflect the rate you receive from your state unemployment agency. Enter the year and quarter when the rate becomes effective in the Effective Yr/Qtr field. This enables you to have different rates within a single calendar year.

Override

(MA only.) The Massachusetts standard Health Ins Rate is set by default from the State Tax table. For Massachusetts, the Health Insurance Rate differs for newer employers. If you're a Massachusetts

employer to whom a lower rate applies, select this check box and enter the correct Massachusetts Health Ins Rate.

Health Ins Rate (MA only) (MA only.) If you select Override, enter the correct Health Ins Rate.

Branch Code This field is informational for Arizona. TAX810AZ.SQR and TAX860AZ.SQR append the branch code to the end of the state EIN.

State Disability

Exempt From ER Disability Select this check box if employees in this state are exempt from employer-paid state disability tax. This field is for informational purposes only and is not used by the system.

Experience Rate The experience rate you enter in the State Disability group box should reflect the rate you receive from your state disability agency. Enter the year and quarter when the rate becomes effective in Effective Tax Yr/Qtr. This enables you to have different rates within a single calendar year.

Note. You must set up a record for Quarter 1, because the system assumes a Quarter 1 record exists. A record for a subsequent quarter is required only if the rate changes mid-year. If you set up a Quarter 2 record, and you don't have a Quarter 1 record, you receive the error "SUT rate not found on Company/State Tax table" during Pay Calculation. This error occurs regardless of the pay end date you are processing.

Employer ID Enter the appropriate employer ID for the State Disability group. This is used for quarterly tax reporting for California when you specify to separately report UI, DI, and PIT wages. You can set this default on the Company table.

Setting Up SUT Exemptions To Generate Data for the TAX002 and TAX810 Reports

The TAX002 and TAX810 reports are generated based on SUT wages. When you select the *Exempt From SUT* field on this page, the system does not generate taxable wages, and the TAX002 and TAX810 reports will contain no data.

Perform the following to generate taxable earnings, enabling the TAX002 and TAX810 reports to produce the required wage detail reporting data, while still remaining exempt from State Unemployment Taxes:

1. Ensure that the Company Exempt from SUT field on the Company Table-FICA/Tax Details page is cleared.
2. Leave the Exempt From SUT field on the Company State Tax Table - General page cleared.

These steps should ensure that the Exempt From SUT field on the State Tax Data 2 field remains clear for each employee. Verify that the Exempt From SUT field is clear on all three pages.

3. Enter a value of 0 (zero) in the State Unemployment Experience Rate.

After you do these steps, the system can track taxable wages without calculating SUT tax dollars. The TAX002 or TAX810 report can report the SUT subject wages.

Establishing Voluntary Disability Plans

Access the Company State Tax Table - VDI page.

The screenshot shows the 'Company State Tax Information' page. At the top, there are tabs for 'General', 'VDI', and 'GL Accounts'. The 'VDI' tab is selected. Below the tabs, the 'Company' is set to 'BN1' and the 'State' is set to 'CA'. The 'Effective Date' is '01/01/1980' and the 'Status' is 'Active'. Below this, there is a section for 'Voluntary Disability Plan' with a checkbox labeled 'Voluntary Disability Plan'. Below the checkbox are fields for 'Plan Number', 'VDI Administrator Code', 'Effective Yr/Qtr', 'Employee Rate', and 'Employer Rate'.

Company State Tax Table - VDI page

- Voluntary Disability Plan** Select this check box to indicate that the plan you're defining is a voluntary disability plan allowed by the state.
- Plan Number** Enter the plan number of the voluntary disability plan. For New Jersey, this number appears on Form W-2.
- VDI Administrator Code** Select the code that identifies the administrator of the voluntary disability plan. You maintain VDI Administrator Codes on the VDI Administrator table.
- Employee Rate** Enter the employee-paid rate.
- Employer Rate** Enter the employer-paid rate.

To set up VDI with a rate of zero so that you can track the VDI wages, enter 99.99999 as the Employee Rate and Employer Rate on this page.

Entering General Ledger Account Numbers for State Taxes

Access the Company State Tax Table - GL Accounts page.

General		VDI	GL Accounts
Company:	BN1	Company BN1	
State:	CA	California	
Company State Tax Information Find View All First 1 of 1 Last			
Effective Date:	01/01/1980	Status:	Active
GL Liability # Non Commit Acct			
SWT:			
SUT (Employee):			
SUT (Employer):			
SDI (Employee):			
SDI (Employer):			
VDI (Employee):			
VDI (Employer):			

Company State Tax Table - GL Accounts page

Enter the general ledger account numbers, if applicable, for the following company liabilities:

SWT	State Withholding liabilities.
SUT (Employee)	State Unemployment employee liabilities.
SUT (Employer)	State Unemployment employer liabilities.
SDI (Employee)	State Disability employee liabilities.
SDI (Employer)	State Disability employer liabilities.
VDI (Employee)	Voluntary Disability employee liabilities.
VDI (Employer)	Voluntary Disability employer liabilities.

Maintaining the Tax Collector Table for Pennsylvania

For each municipality and overlying school district, the State Tax Register lists the effective rates for both Earned Income and Occupational Privilege taxes for residents and, when applicable, non-residents. Earned income and occupational privilege tax collector information for each municipality and school district are also listed. In some instances, there are different tax collectors for the municipality and the school district. When this occurs, employers must remit the school district's tax to its collector and the municipality's tax to its collector.

Tax collectors are set up as vendors using the Tax Collector Table component. You'll use the vendor tables to enter information about the tax-collecting agency. You then enter the vendor code on the Local Tax Type-Classes page.

See Also

[Chapter 19, "Setting Up Vendors," page 371](#)

Defining an Entry for the Company Local Tax Table

This section discusses how to set up an entry in the Company Local Tax table for each locality where the company withholds or pays taxes. You must complete this table before local tax data for employees is entered, because the locality field on the Local Tax Data page is edited against this table.

Pages Used to Define an Entry for the Company Local Tax Table

Page Name	Object Name	Navigation	Usage
Comp Local Tax Tbl (company local tax table)	COMP_LOCAL_TAX_TBL	- Set Up HRMS, Product Related, North American Payroll, Local Taxes, Company Local Tax Table - Set Up HRMS, Product Related, North American Payroll, Local Taxes, Agency Local Tax Table USF	Set up an entry in the Company Local Tax Table page for each locality where the organization withholds or pays taxes.
Company Local Tax - Run Control	PRCSRUNCNTRL	- Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Company Local Tax - Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Agency Local Tax USF	Run TAX705 to print information from the Company Local Tax Table, which identifies the localities for which your organization collects and pays taxes.

(USA) Setting Up Company Local Tax Table Entries

Access the Comp Local Tax Tbl page.

Comp Local Tax Tbl	
Company:	BN1 Company BN1
State:	CA California
Locality:	67000 SAN FRANCISCO ER TAX
Company Local Tax Information Find View All First 1 of 1 Last	
*Effective Date:	03/01/1998  *Status: Active  + -
Employer ID:	94-1111111
GL Account Number - Local Withholding Tax for Non Commitment Accounting	
Employee	
Employer	

Comp Local Tax Tbl page

Employer ID

This field is used for local withholding tax for this locality. It is set by default to the Employer ID for state withholding taxes on the Company State Tax table.

GL Account Number - Local Withholding Tax for Non Commitment Accounting

These accounts are General Ledger accounts for use with local withholding tax; they are only used by the PayGL01 process. Only GL information not subject to Commitment Accounting would use these accounts.

Employee and Employer

If you have general ledger account numbers to which you post liability for local withholding tax for this locality, enter the employee and employer account numbers here.

(USF) Setting Up State and Locality Tax Routing

This section lists the pages used to identify the payment method for paying state and local taxes and to provide details for the selected payment method.

Pages Used to Set Up State and Locality Tax Routing

Page Name	Object Name	Navigation	Usage
State Tax Routing 1	GVT_ST_TAX_RT1	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, State Tax Routing USF	Identify the payment method for paying state taxes and provide details of the EFT method.
State Tax Routing 2	GVT_ST_TAX_RT2	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, State Tax Routing USF	Identify check address information if the payment method for paying state taxes is by check.
Locality Tax Routing 1	GVT_LC_TAX_RT1	Set Up HRMS, Product Related, North American Payroll, Local Taxes, Locality Tax Routing USF	Identify the payment method for paying local taxes and provide details of the EFT method.
Locality Tax Routing 2	GVT_LC_TAX_RT2	Set Up HRMS, Product Related, North American Payroll, Local Taxes, Locality Tax Routing USF	Identify check address information if the payment method for paying local taxes is by check.
State Tax TSP Addendum Information	GVT_ST_TAX_RT_DET	Click the TXP Addendum Control button on the State Tax Routing 1 page or the Locality Tax Routing 1 page.	Provide TXP addendum information and amount controls.

Establishing Tax Types for Accounts Payable Integration

This section provides an overview of tax types for accounts payable integration and discusses how to:

- Define names of tax types to use for accounts payable integration.
- Link a tax type to a federal or state tax authority and set of tax classes.
- Link a tax type to the local tax authority and tax classes.
- Define Canadian federal and provincial tax types.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Administering the Interface with PeopleSoft Payables”

Understanding Tax Types for Accounts Payable Integration

If you plan to use PeopleSoft Payables to send tax authorities the taxes deducted from employees’ paychecks, you must link the appropriate set of deductions to each tax vendor. This is a two-step process:

1. Create names for the tax types you want to use.

A tax type represents a collection of tax classes, such as withholding, earned income credit, and so on, specific to a particular tax jurisdiction (federal, state, local, provincial). You define U.S. tax types from the Tax Type Table page. For Canadian taxes, use the Canadian Tax Type Table page.

2. Define each tax type by jurisdiction.

That is, you select the set of tax classes that are to be paid to the vendor you specify. Use the following pages, as appropriate: Fed/State Tax Types/Classes, Local Tax Types/Classes, and Canadian Tax Type Table.

Example

In the state of California, employees are subject to two taxes for short-term disability: SDI (paid to the state) and OASDI (paid to the federal government). Each tax is comprised of a different set of tax classes. In this case, we might create a tax type named Short-Term disability. We would then access the Fed/State Tax Type/Classes page and define what Short-Term Disability represents at the federal level: For the vendor, we select the Internal Revenue Service; for the tax classes we select only those included in OASDI. We then repeat the process to define Short-Term Disability at the state level. This time, we select the Franchise Tax Board as the vendor and just those tax classes that contribute to SDI.

Common Elements Used in This Component

Tax Type	Select the tax type you want to define. The prompt table displays the names of the tax types you set up on the Tax Type Table page.
SetID	Select the setID for the tax type. This determines which set of vendors (tax authorities) you can select from the Vendor ID field.
Vendor ID	Select the tax authority (vendor) to which you want the state, federal, local, or province taxes for this tax type paid. The prompt table displays only those vendors associated with the setID you selected.
Class Name	From the drop-down list box, select the tax classes associated with this tax type and vendor. Add all applicable tax classes.

Pages Used to Set Up Tax Types for Accounts Payable Integration

Page Name	Object Name	Navigation	Usage
Tax Type Table	TAX_TYPE_TBL	- Set Up HRMS, Product Related, North American Payroll, AP - Tax Types/Classes, Tax Type Table - Set Up HRMS, Product Related, North American Payroll, AP - Tax Types/Classes, Tax Type Table USF	Define the names of the tax types you want to use.
State Tax Type Table	STAT_TAX_TYPE_PNL	- Set Up HRMS, Product Related, North American Payroll, AP - Tax Types/Classes, State Tax Types/Classes - Set Up HRMS, Product Related, North American Payroll, AP - Tax Types/Classes, State Tax Types/Classes USF	Link a tax type to a federal or state tax authority and set of tax classes.
Local Tax Type Table	LOCL_TAX_TYPE_PNL	- Set Up HRMS, Product Related, North American Payroll, AP - Tax Types/Classes, Local Tax Types/Classes - Set Up HRMS, Product Related, North American Payroll, AP - Tax Types/Classes, Local Tax Types/Classes USF	Link a tax type to the local tax authority and the applicable set of tax classes.
Canadian Tax Type Table	CAN_TAX_TYPE	Set Up HRMS, Product Related, North American Payroll, AP - Tax Types/Classes, Tax Type Table CAN	Define Canadian federal and provincial tax types.

(CAN) Defining Canadian Federal and Provincial Tax Types

Access the Canadian Tax Type Table page.

Canadian Tax Type Table

Tax Type: CTAX

AP Payment Definition Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980 **Description:** Source Deductions

***Source:** Statutory Deductions **Province:**

SetID: SHARE **Vendor ID:** CANKC00002 Receiver General for Canada

Statutory Deductions Customize | Find | View All | First 1-5 of 6 Last

Tax Class	Description		
CIT	Canadian Income Tax (T4)		
CPP	Canada Pension Plan Employee		
CPR	Canada Pension Plan Employer		
EIE	Employment Insurance Employee		
EIR	Employment Insurance Employer		

Canadian Tax Type Table page

Source Select the type of tax transaction from the drop-down list. Values include *Goods and Services Tax*, *Health and Payroll Taxes*, *Provincial Sales Tax*, or *Statutory Deductions*.

Province If you chose *Provincial Sales Tax* in the Source field, select the Province in this field.

Tax Class From the drop-down list box, select the tax class you want to associate with this tax type and vendor. Add all applicable tax classes. The Source field determines which tax classes are available for selection.

If *Goods and Services Tax* is selected, only federal sales tax types are allowed: *G (GST)* and *H (HST)*.

If *Health and Payroll Taxes* is selected, only health and payroll tax types are allowed: *HTX* and *PYT*.

If *Provincial Sales Tax* is selected, only provincial sales tax types are allowed: *I (PSTI)*, *P (PST)*, *Q (QSTI)*, *S (QST)*, *T (PPT)*, and *U (QPT)*.

If *Statutory Deductions* is selected, only income related tax types are available: *CIT*, *CPP*, *CPR*, *EIE*, *EIR*, *QIT*, *QPP*, *QPR*, *RV2* and *T4A*.

See Also

Chapter 19, "Setting Up Vendors," page 371

(USA) Defining Tax Locations

This section provides an overview of defining tax locations and discusses how to:

- Establish the locations for which you process payroll and taxes.
- Associate any number of states, localities, and linked localities.

Understanding Tax Locations

The system establishes federal, state, and local employee tax data and tax distribution data according to the information you establish in the Tax Location table. In this table, you establish each of your locations with a Tax Location ID and identify the work states, provinces, and localities associated with each tax location.

Note. If you've selected Automatic Employee Tax Data on the Installation table, the system automatically sets up tax data for each work and resident state and locality of each of your employees. Tax distribution records are created for the work state/locality if the tax location represents a single state/locality.

Pages Used to Define Tax Locations

Page Name	Object Name	Navigation	Usage
Tax Location Table - Address	TAX_LOCATION_TBL1	• Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Tax Location Table • Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Tax Location Table	Establish the locations for which you process payroll and taxes.
Tax Location Table – State/Province/Locality	TAX_LOCATION_TBL2	• Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Tax Location Table • Set Up HRMS, Product Related, Payroll Interface, Earnings/Pay, Tax Location Table	Associate any number of states, localities, and linked localities with the tax location code.
Tax Location Report	PRCSRUNCNTL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Tax Location	Generate PAY718 that lists information from the Tax Location Table.

Establishing the Locations for Which You Process Payroll and Taxes

Access the Tax Location Table - Address page.

Address State/Province/Locality

Tax Location Code: B-003 ***Status:** Active

Tax Location Information

***Description:** Walnut Creek Branch

Short Desc: Wal Crk Br

Country: USA United States

Address: 1616 Main St
Walnut Creek, CA 94596 [Edit Address](#)

Alaska Area Code:

Tax Location Table - Address page

Tax Location Code Establish a tax location code for each location for which you process payroll and tax data. You can associate any number of states and localities with each code.

Alaska Area Code If applicable, select an Alaskan area code.

Note. If you select Automatic Employee Tax Data on Installation table 1 and assign a Tax Location ID to each employee on the Job Data table, each employee's tax data is set by default to the Employee Tax Data page and the Employee Tax Distribution page.

Associating States and Localities With the Tax Location Code

Access the Tax Location Table – State/Province/Locality page.

Address State/Province/Locality

Tax Location Code: B-003 **Walnut Creek Branch** **Status:** Active

Tax Location Information [Customize](#) [Find](#) [View All](#) First 1 of 1 Last

*State / Province	Locality	Locality Name	Other Work Locality
CA			

Tax Location Table - State/Province/Locality page

State Use to identify each state that is associated with the tax location code. You can associate any number of states with a single tax location. For each state, identify each taxing locality, if any.

The states you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.

Locality	The localities you associate with this tax location code must be defined on the Company State Tax table and the Company Local Tax table. This value is set by default to the Employee Tax Data pages and the Employee Tax Distribution page for employees you assign to this tax location.
Other Work Locality	Use this field only where multiple local taxes apply in one location, such as: • Paducah, KY and McCracken County, KY. • Earned Income Tax, and Occupational Privilege Tax in Pennsylvania. To form further links in a locality chain: • Add another row with the same state. • Enter the other work locality from the previous row in Locality. • Enter the new other work locality.

Note. You should never attempt to enter multiple Indiana localities. Regardless of the number of Indiana locations in which an employee may work, either simultaneously or over the course of the year, the employee is liable for Indiana county tax for only one Indiana county per calendar year. This is the Indiana county of residence as of January 1, if that county imposes a tax, or the Indiana county of principal work activity as of January 1, if the residence county does not impose a tax.

Note. Locality and Other Work Locality are not required in Canada, because a Canadian employee can be taxed in only one Province at a time, and there are no locality taxes in Canada.

See Also

Chapter 11, “Setting Up Organization Foundation Tables,” page 145

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

PeopleSoft 8.8 Payroll for North America PeopleBook, “Maintaining Payroll Data,” Understanding Split Local Tax Distribution for KY, AL, and OR

Defining Tax Forms

The year-end processing documentation discusses how to define tax forms and print parameters.

See *PeopleSoft 8.8 Payroll for North America PeopleBook*, “Accessing Year-End Processing Instructions”.

(E&G) Establishing 1042 Processing for Non-resident Aliens

This section provides an overview of establishing 1042 processing for non-resident aliens and discusses how to set up the rules associated with the treaties required for each country with which the U.S. has an agreement.

Understanding Tax Treaties

The U.S. government has entered into tax treaties with nearly 40 foreign jurisdictions. Income tax treaties coordinate the tax systems of the United States and other countries that are parties to treaties. Treaty provisions affect the taxation of non-resident aliens working in the U.S. While tax treaties are generally based on a standard model, each treaty might have slightly different provisions.

To claim benefits of a treaty, an employee must have a visa and be a resident of one of the treaty countries. An employee can claim benefits of only one treaty at any given time. Employees who want to claim benefits under a tax treaty must submit a written statement and applicable forms (W-4, Form 8233, Form 1001) to their employer.

As an employer, you must apply the specific treaty rules when calculating federal withholding tax. These rules often include time limits and earnings caps. Different types of earnings, such as scholarships, grants, and fellowships, might be subject to different taxation rates. You must produce a Form 1042-S and a 1042 summary form for each non-resident alien employee affected by the special withholding rates. If you file 250 or more 1042-S forms, you must report on magnetic media. Earnings reported on a 1042-S are not reported on a W2; so, an employee may need both a W2 and a 1042-S if some earnings are covered by the special tax treaty rates and some are not.

In addition to employees covered by tax treaties, some non-resident alien employees, such as those with specific types of earnings such as scholarships, fellowships, and grants, must also have those earnings reported on a 1042-S.

Use the Treaty/NR Alien Table page to capture the tax rates specified in tax treaties (including exempt earnings, which are recorded with a 0% tax rate). This table identifies those earnings subject to a 30% flat withholding tax.

Pages Used to Establish 1042 Processing for Non-Resident Aliens

Page Name	Object Name	Navigation	Usage
Treaty NR Alien Table	TREATY_NRA_TABLE	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, Treaty/NR Alien Table	Set up the rules associated with the treaties required for each country with which the U.S. has an agreement.
Treaty/NR Alien - Run Control	PRCSRUNCNTL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Tax Treaty Table	Print information from the Tax Treaty Table.

Setting Up 1042 Processing for Non-Resident Aliens

Access the Treaty NR Alien Table page.

Treaty NR Alien Table

Country: CAN Canada
Treaty ID: TIAS 11087

Treaty Info. Find First 1 of 1 Last

***Effective Date:** 01/01/1985 ***Status:** Active

***Treaty Description:** Canada

Short Description: Can

Allowances Permitted: 999

Months Eligible for Treaty: 0

Tax Info. Customize | Find | View All First 1-2 of 5 Last

*Income Code (for 1042-S)	Max Earnings Eligible Per Year	Tax Rate (after form)	Tax Rate (before form received)		
Royalties	9,999,999.99		0.300000		
Scholarship/Fellowship Grants	9,999,999.99	0.140000	0.140000		

Treaty NR Alien Table page

Country	If you want to establish entries on the Tax Treaty NR Alien table that are applicable to more than one country (for example, to use for all scholarship income that is to be taxed at 30%), you can use any value prefixed by a \$ in the country code (for example, Country = \$S).
Allowances Permitted	For each tax treaty record you establish, specify the number of allowances permitted by the treaty.
Income Code (for 1042-S)	Select each type of earnings subject to special tax treatment under the treaty.
Max Earnings Eligible Per Year	Specify the earnings caps that apply for each earnings type.
Tax Rate (after form)	Specify the taxation rates that apply for each earnings type.
Tax Rate (before form received)	Specify the taxation rates that apply for each earnings type.

Note. PeopleSoft re-delivers the tax treaty table with each major release and, if required, with the year-end Tax Update. If interim changes are required, you must track and apply the changes in your environment.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Maintaining Payroll Data”

(USA) Establishing UI Report Codes

This section discusses how to set up UI report codes for each of your company's work sites.

Page Used to Establish UI Report Codes

Page Name	Object Name	Navigation	Usage
UI Report Code Table	CO_UI_RPTCD_TBL	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, UI Report Code Table	Establish UI report codes in PeopleSoft Payroll for multiple work sites.

Setting Up UI Report Codes

Access the UI Report Code Table page.

UI Report Code Table

Company: HX2 Company HX2

Tax Location Code: I9OH1

Tax Location State:

Company UI Information			
*Effective Date:	01/01/1980	*Status:	Active
UI Report Code:	I9OH1TC1	Employer ID Ext:	

UI Report Code Table page

Information you enter here works with the Multiple Worksite Report (SQR TAX004) to link a Tax Location Code to a UI Report Code. When you add an entry to the UI Report Code table, the system prompts you to enter the company code and the location code of the site you want to establish for reporting worksite information to the U.S. Bureau of Labor Statistics.

Company UI Information

UI Report Code	Enter the code you have received from the state for this site.
Employer ID Ext (employer ID extension)	(E&G) This field is for employers that need to report the quarterly tax report for multiple account numbers for different locations (MN/MI) or multiple categories (CA). The MN/MI tax report programs (both tax report and create magnetic tape) append the extension ID to Employer SUT ID (from the Company State Tax table) as a unique ID for reporting purposes.

(USA) Establishing U.S. Standard Occupational Classifications for Alaska

This section discusses how to set up the U.S. Standard Occupational Classification (SOC) Table page in quarterly unemployment insurance reporting for the state of Alaska. If your company has no operations in Alaska, ignore this table.

Page Used to Establish U.S. Standard Occupational Classifications for Alaska

Page Name	Object Name	Navigation	Usage
U.S.SOC Table	US_SOC_TABLE	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, U.S. SOC Table	Set up the U.S. Standard Occupational Classification (SOC) Table page in quarterly unemployment insurance reporting for the state of Alaska.

Setting Up U.S. Standard Occupational Classifications for Alaska

Access the U.S. SOC Table page.

Standard Occupational Classification Code

The codes established here are used in the reports Quarterly State Employee Wage Listing for Alaska (TAX002AK) and Quarterly UI Wage Tape for Alaska (TAX810AK). These reports correspond to Alaska's quarterly *Employer's Report of Wages for Each Employee* form.

Note. Use the Job Code table to link Standard Occupational Classification codes with particular job codes in your organization.

(USA) Specifying Voluntary Disability Insurance Plan Location and Contact Information

This section discusses how to enter location and contact information for administrators of any voluntary disability plans for your organization.

Pages Used to Enter Voluntary Disability Insurance Plan Location and Contact Information

Page Name	Object Name	Navigation	Usage
VDI Administrator	VDI_ADMIN_TABLE	Set Up HRMS, Product Related, North American Payroll, Federal/State Taxes, VDI Administrator Table	Enter location and contact information about the administrators of employee voluntary disability plans. After you've established your VDI Administrators, assign administrators to their voluntary disability plans on the Company State Tax Table 2 page.
VDI Administrator - Run Control	PRCSRUNCNTL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, VDI Administrator	Print information from the VDI Administrator Table.

(USA) Specifying Parameters for Yearly and Quarterly Tax Reporting

This section discusses how to specify parameters for yearly and quarterly tax reporting.

Page Used to Specify Parameters for Quarterly Tax Reporting

Page Name	Object Name	Navigation	Usage
Tax Reporting Parameter 1	TAX_RPT_PARAMETERS	North American Payroll, Quarterly Processing, Define Tax Reporting Parameter	Set up parameters for quarterly tax reporting.

Defining Parameters for Quarterly Tax Reporting

Access the Tax Reporting Parameter 1 page.

Tax Reporting Parameter 1		Tax Reporting Parameter 2	
Balance ID:	CY		
Transmitter ID:	FRG		Federal Reserve Board
*Balances for Year:	1996		
*Balances for Quarter:	4		
Computer Manufacturer:		☒	Transmitter Same as Employer?
*Organization Type:	Other		
*Type of Employment:	Regular (All Others)		
*Tape Label:	No Label		
*Tape Density:	6250 CPI		
*Recording Code:	ASCII		

Tax Reporting Parameter 1 page

W-2 Transmitter ID	Enter the Company ID of the company transmitting W-2s for tax reporting. This is used in a multi-company environment when a single company acts as the transmitter for all companies in the organization.
Balances for Year	The value you enter here defines the reporting period.
Balances for Quarter	The value you enter here defines the reporting period.
Computer Manufacturer	Enter the name of the manufacturer, such as IBM, Compaq, or Digital that makes the computer you use to create the magnetic media (such as diskette or tape) for tax reporting.
Transmitter Same as Employer?	This field is not currently used by Payroll for North America.
Organization Type	Select <i>Government</i> or <i>Other</i> .
Type of Employment	Select <i>Agriculture</i> , <i>Federal</i> , <i>Medicare Qualified Government Employee</i> , <i>Military</i> , <i>Railroad</i> , or <i>Regular (All Others)</i> .
Recording Code	Select <i>ASCII</i> or <i>EBCDIC</i> .

Note. The Tax Reporting Parameter 2 page is not used for quarterly reporting.

Defining Parameters for Yearly Tax Reporting

The most up-to-date documentation of yearly tax reporting parameters is in the current year-end tax update documentation.

See *PeopleSoft 8.8 Payroll for North America PeopleBook*, “Accessing Year-End Processing Instructions”.

(CAN) Defining Canadian Tax Information

This section discusses how to:

- Define Canadian company tax information.
- Define Canadian wage loss plans.
- Define Canadian yearly tax reporting parameters.

Pages Used to Define Canadian Tax Information

Page Name	Object Name	Navigation	Usage
Canadian Company Tax Table	CAN_USR_TAX_TABLE1	Set Up HRMS, Product Related, North American Payroll, Canadian Taxes, Company Tax Table	Identify the Prescribed Interest Percent, Province, Provincial Premium Tax Percent, and Health Insurance Rate Override for each company you set up.
Wage Loss Plan Liability Accts (wage loss plan liability accounts)	WAGELS_PLN_TBL1	Set Up HRMS, Product Related, North American Payroll, Canadian Taxes, Wage Loss Plan Table	Define a wage loss plan for your company.
Wage Loss Plan Expense Accts (wage loss plan expense accounts)	WAGELS_PLN_TBL2	Set Up HRMS, Product Related, North American Payroll, Canadian Taxes, Wage Loss Plan Table	Define expense accounts for your company.
Wage Loss Plan Report	PRCSRUNCNTL	Set Up HRMS, Product Related, North American Payroll, Tax Table Reports, Wage Loss Plan CAN	Generate a report that lists information from the Wage Loss Plan Table for Canadian employers.
Canadian Tax Reporting Parameters	CTX_PRC_PARAMETERS	North American Payroll, Year End Processing CAN, Define Annual Tax Reporting, Tax Reporting Parameters	Define Canadian tax reporting parameters used in yearly tax reporting.

Defining Canadian Company Tax Information

Access the Canadian Company Tax Table page.

Canadian Company Tax Table

Company: CFN Canadian Company CFN

Company Tax Information

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1997

Prescribed Interest Percent: 6.000

Company Tax Rates

Customize | Find | View All | First 1-5 of 5 Last

*Province	Provincial Premium Tax Percent	Health Insurance Rate Override		
MB	0.00	0.045000	+	-
NF	4.00	0.000000	+	-
NS	3.00	0.000000	+	-
PE	3.00	0.000000	+	-
QC	2.35	0.000000	+	-

Canadian Company Tax Table page

Company Tax Information

Prescribed Interest Percent If your company processes low interest loans, enter the current prescribed interest percent. This rate is updated quarterly by the Canadian federal government.

Company Tax Rates

Province Enter all applicable provinces in which the company operates and needs to process PPT tax or override a Health Insurance Rate.

Provincial Premium Tax Percent Enter the provincial premium tax percent applicable to group life and health insurance benefit plan premiums, if your company is responsible for withholding and submitting the tax.

Health Insurance Rate Override Enter the health insurance rate override to specify the premium rate that applies to your company, if that rate is different from the rate defined on the Canadian Tax Table Provincial Rates page. This field applies to companies operating in provinces, such as Ontario and Manitoba, where variable rates apply based upon total gross payroll figures.

Note. It is your responsibility to update all rates on the Canadian Company Tax table.

Warning! It is your responsibility to update the Prescribed Interest Percent field according to the rate set each quarter by the Canadian federal government. PeopleSoft does not update this field in its tax updates; PeopleSoft leaves the field blank.

Defining Canadian Wage Loss Plans

The Canadian Wage Loss Plan table identifies valid Canadian wage loss replacement plans. The Wage Loss Replacement Plan field in the Canadian Income Tax Data table at the employee level is edited against this table. You must create entries on this table before you enter any Canadian tax data for your employees. You must set up at least one entry on the Wage Loss Plan table for each company. Typically, you create this entry using the default EI Employer Rate and corresponding Quebec EI Employer Rate. You must define additional entries for each wage loss plan your company has registered with CCRA.

Access the Wage Loss Plan Liability Accts page.

Wage Loss Plan Liability Accts | **Wage Loss Plan Expense Accts**

Company: CFN **Wage Loss Replacement Plan:** LOW

Wage Loss Plan Information Find | View All First 1 of 1 Last

*Effective Date: 01/01/1991 *Status: Active

Tax Year: 1991 Business Number: 123456789RY0002

EI Employer Rate: 1.2981 RCT Acct#: ABC123457

Quebec EI Employer Rate: 1.2981

Liability Accounts - Non Commitment Accounting Customize | Find | View All | First 1-5 of 12 Last

Tax Class	GL Account #		
Canadian Income Tax (T4)	CIT-LOW-LIA	+	-
Canada Pension Plan Employee	CPP-EE-LOW-LIA	+	-
Canada Pension Plan Employer	CPP-ER-LOW-LIA	+	-
Employment Insurance Employee	CUI-EE-LOW-LIA	+	-
Employment Insurance Employer	CUI-ER-LOW-LIA	+	-

Wage Loss Plan Liability Accts page

Wage Loss Plan Information

Business Number	For each plan you set up, enter your company's unique CCRA Taxation account number in this field. Because a company can have more than one wage loss replacement plan, you can set up any number of plans on this table.
EI Employer Rate	This is the rate of your contribution to Employment Insurance. The default rate (which comes from the Employer EI Premium Rate on the Canadian Tax table) may be overridden with your specific plan rate.
RCT Acct #	This field is hidden on the page for all entries with an Effective Date of 01/01/1997 or later. The field will be displays and is available for use for all entries dated prior to 01/01/1997 for historical purposes only.
Quebec EI Employer Rate	This is the rate of your contribution to Employment Insurance. You can override the default rate (which comes from the Quebec Employer EI Premium Rate on the Canadian Tax table) by entering your specific plan rate.

Defining Expense Accounts for Your Company

Access the Canadian Wage Loss Plan Table - Wage Loss Plan Expense Accts page.

Wage Loss Plan Liability Accts		Wage Loss Plan Expense Accts	
Company:	CFN	Wage Loss Replacement Plan:	LOW
Wage Loss Plan Information Find View All First 1 of 1 Last			
Effective Date:	01/01/1991	Status:	Active + -
Tax Year:	1991	Business Number:	123456789RY0002
EI Employer Rate:	1.2981	RCT Acct#:	ABC123457
Quebec EI Employer Rate:	1.2981		
Expense Accounts - Non Commitment Accounting Customize Find View All First 1-5 of 12 Last			
Tax Class	GL Account #		
Canadian Income Tax (T4)	CIT-LOW-EXP	+	-
Canada Pension Plan Employee	CPP-EE-LOW-EXP	+	-
Canada Pension Plan Employer	CPP-ER-LOW-EXP	+	-
Employment Insurance Employee	CUI-EE-LOW-EXP	+	-
Employment Insurance Employer	CUI-ER-LOW-EXP	+	-

Wage Loss Plan Expense Accts page

Wage Loss Plan Information

- Business Number** For each plan you set up, enter your company's unique CCRA Taxation account number in this field. Because a company can have more than one Wage Loss Replacement Plan, you can define any number of plans on this table.
- EI Employer Rate** This is the rate of your contribution to Employment Insurance. The default rate (which comes from the Employer EI Premium Rate on the Canadian Tax table) may be overridden with your specific plan rate.
- Quebec EI Employer Rate** This is the rate of your contribution to Employment Insurance. You can override the default rate (which comes from the Quebec Employer EI Premium Rate on the Canadian Tax table) by entering your specific plan rate.

Defining Canadian Yearly Tax Reporting Parameters

Access the Tax Reporting Parameters page.

Tax Reporting Parameters		
Parameters		
Balance ID:	CY	Calendar Year
*Balances for Year:	1999	
*Balances for Quarter:	4	 Quarter 4
Alignment Count:	2	

Tax Reporting Parameters page

Balance ID	The value you enter here defines the annual reporting period.
Balances for Year	The value you enter here defines the annual reporting period.
Balances for Quarter	Year-end reporting programs ignore this field.
Alignment Count	This field determines how many alignment pages are created at the beginning of the print files. The system multiplies the number of pages by the number of forms per page to determine how many alignment forms to print.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Accessing Year-End Processing Instructions”

(CAN) Defining Canadian WCB Assessment Reporting

This section provides an overview of Canadian WCB (Workers' Compensation Board) assessment reporting and discusses how to:

- Define WCB assessable earnings.
- Define WCB classifications, rate groups, and assessment rates.
- Associate jobs with provinces, rate groups, and classifications.
- Use the Officer Code Field on the Job Information Page to exclude employees from the workers compensation report.

Understanding Canadian WCB Assessment Reporting

PeopleSoft Payroll enables employers registered with the Workers' Compensation Boards in Canada to report and pay assessments based on the total assessable earnings of their workers. The system accommodates the assessment reporting structures of all provinces. This functionality enables the reporting of assessments by rate groups and classification units.

Pages Used to Define Canadian WCB Assessment Reporting

Page Name	Object Name	Navigation	Usage
Tax Form Definitions	TAXFORM_DEFN_TBL	North American Payroll, Year End Processing CAN, Define Annual Tax Reporting, Tax Form Definitions	Define WCB assessable earnings.
WCB Classifications	CAN_WCB_CU_RATES	Set Up HRMS, Product Related, North American Payroll, Canadian Taxes, WCB Classifications	Define WCB classifications, rate groups, and assessment rates.

Defining WCB Assessable Earnings

To define WCB assessable earnings, you need to establish a new Tax Form ID—WCB Assessable Earnings—and the associated tax form Boxes for each province on the Tax Form Definition page. The Boxes reflect the two-letter province code, preceded by a W.

You also must define and associate the assessable Earnings and Deduction Codes for each province with the WCB Assessable Earnings Tax Form ID. The Earnings Codes defined as Regular Hours and Overtime Hours on the Pay Group table are automatically accumulated by the system as assessable earnings without defining them on the Tax Form Definitions page.

Select the applicable provinces and define the assessable earnings.

Associate the *WCB Assessable Earnings* tax form ID with the appropriate Plan Type, Deduction Code, Ded (Deduction) Class, Sales Tax, and Earnings Code.

Note. The earnings codes defined as Regular Hours and Overtime Hours on the Pay Group table are automatically accumulated by the system as assessable earnings without defining them on the Tax Form Definitions page.

See Also

Chapter 18, “Setting Up Payroll Tax Tables,” Defining Tax Forms, page 356

Define WCB Classifications, Rate Groups, and Assessment Rates

Access the WCB Classifications page.

WCB Classifications

Company: CFB

WCB Firm Information Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 Province: ON

*WCB Firm Number: ON1888 Single Classification Firm ☐

Rate Group Information Find | View All First 1 of 5 Last

*Rate Group: 911 Default Assessment Rate: 1.21

Description: Rate Group 911

Classification Units and Assessment Rates Customize | Find | View All First 1 of 5 Last

*Classification	Description	Rate
024	Classification 024	1.21

WCB Classifications page

This page can accommodate both a single classification assigned to a single province and multiple Rate Groups associated with multiple classifications (or CUs) for a single province.

WCB Firm Number	Enter the WCB firm number. If a single rate group and/or classification and assessment rate applies to all covered employees in the province, select Single Classification Firm.
Single Classification Firm	If this check box is selected, the Workers Compensation report (PAY102CN) uses the entry on this page as the source for reporting assessment information for all covered employees in the province. If this check box is cleared, the information defined on the Job Code table (WCB Classifications page) 4 is used as the source for reporting.
Rate Group	When adding the original entry for a province, this is set by default to <i>N/A</i> . If rate groups are applicable to the specified province, override the default by entering the rate group.
Default Assessment Rate	If you enter a default assessment rate, that rate populates into the Assessment Rate for each Classification assigned to the Rate Group.
Description (for Rate Group)	Enter the rate group description, if applicable. Similar to the Rate Group field, the description is set by default to <i>Not Applicable</i> when adding the original entry for a province.
Classification	Define a classification or classification unit (CU).
Assessment Rate	Enter the assessment rate applicable to the classification.

CHAPTER 19

Setting Up Vendors

This chapter provides an overview of vendors and explains how to enter vendor information.

Overview of Vendors

A vendor is any agency or organization that the company sends money to on behalf of an employee or that the company has withheld from an employee's paycheck. Vendors can be:

- Benefit providers
- Garnishment payees
- Tax collectors

The system stores information about the vendor in the vendor table. It holds the information necessary to make payments to a vendor and the policy information for a benefit provider.

Integrating with PeopleSoft Payables

If you are using PeopleSoft Payables to pay your vendors, it is recommended that you enter a vendor using PeopleSoft Payables and export the vendor table to PeopleSoft Human Resource Management System (HRMS). You can enter vendors through the PeopleSoft HRMS and it will be exported to the PeopleSoft Payable system. However, any changes to existing vendors that are made through PeopleSoft HRMS will not be exported to the PeopleSoft Payables system.

PeopleSoft Payables, Payroll for North America, and Payroll Interface use publish and subscribe methodology to populate each other's Vendor Tables. The two application messages used to publish and subscribe are called:

VENDOR_SYNC, which is an incremental publish and subscribe messaging.

VENDOR_FULLSYNC, which is a full table publish and subscribe messaging.

The primary difference between the Incremental and the Full Table messages is that the Incremental messages process individual whereas the Full Table messages process all vendors on the table.

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

Entering Vendor Information

To enter vendor information, you will complete the following pages:

- Vendor Control
- Addresses
- Locations
- Contacts
- Policy Information

Vendor Control

This is used only if you want PeopleSoft Payables to pay the vendor. It provides a mechanism for identifying the different types of vendors.

Vendor Information

This page creates the vendor code and identifies the name and type of vendor you are entering.

Addresses

This is a strictly address information and should not be confused with location. You can enter multiple addresses for the different sites a vendor might have.

Location

A vendor location is not a physical address. It is a default set of rules, or attributes, which define how you conduct business with a particular vendor. A vendor's location comprises information such as payment terms, remittance information, bank account information, and so on. Although a location is not an address, it will reference addresses.

Your vendor may need only one location. If the vendor uses the same set of rules across its business, you can simply enter one location for your vendor, and you're ready to go. If, however, your vendor uses different sets of rules for different portions of its business (different branches, sites, or offices, for example) you can set up the vendor with multiple locations, each with its own unique set of business rules.

Contacts

This page is used to enter information about the people whom you contact on a regular basis. You can enter an unlimited number of vendor contacts and identify their roles so that you can easily determine whom you should contact if you have questions, or discern why a contact might want to talk to you, before you return their call.

Policy Information

Policy information is necessary for benefit providers. You will link this vendor and policy information using the Benefit Plan table in Base Benefits.

Pages Used to Set Up Vendors

Page Name	Object Name	Navigation	Usage
Vendor Control	VNDR_CNTRL	Set Up HRMS, Product Related, North American Payroll, AP-Vendors, Vendor Control	Identify the prefix assigned to the vendor in PeopleSoft Payables.
Vendor Information	VNDR_ID1	- Set Up HRMS, Product Related, North American Payroll, AP-Vendors, Vendor Information - Set Up HRMS, Product Related, North American Payroll, Garnishments, Payee Table	Enter basic vendor information.
Addresses	VNDR_ADDRESS	- Set Up HRMS, Product Related, North American Payroll, AP-Vendors, Vendor Information - Set Up HRMS, Product Related, North American Payroll, Garnishments, Payee Table	Enter a vendor's address information.
Alternate Names	VNDR_ADDR_ALTN	Click Alternate Names on the Addresses page.	Enter any alternate name for use on payments.
Phone Information	VNDR_ADDR_PHN	Click Telephone on the Addresses page.	Enter a vendor's phone information for addresses. You can enter more than one phone number per address.
Email ID	VNDR_ADDR_EMAILID	Click Email ID on the Addresses page.	Enter a vendor's email addresses.
Locations	VNDR_LOC	- Set Up HRMS, Product Related, North American Payroll, AP-Vendors, Vendor Information - Set Up HRMS, Product Related, North American Payroll, Garnishments, Payee Table	Enter address and remittance information.
Bank Accounts	VNDR_BANK_ACCOUNT	Click Bank Accounts on the Locations page.	Enter banking information for the vendor.
Bank Address	BANK_ACCT_ADDR_SEC	Click Bank Address on the Bank Accounts page.	Enter the bank's address information. The bank's Country defaults from the Bank Accounts page. The form of the address fields varies, depending on the country.
Phone Details	BANK_ACCT_PHON_SEC	Click Phone Details on the Bank Accounts page.	Enter phone information for the bank.

Page Name	Object Name	Navigation	Usage
Comments	VNDR_LOC_COMMENTS	Click Comments on the Locations page.	Enter notes or comments about locations.
Payment Options	VNDR_PAY	Click Payment Options on the Locations page.	Enter payment processing rules for the vendor location.
Contacts	VNDR_CNTCT	- Set Up HRMS, Product Related, North American Payroll, AP-Vendors, Vendor Information - Set Up HRMS, Product Related, North American Payroll, Garnishments, Payee Table	Enter a vendor's contact person. Enter more than one phone number if necessary.
Telephone	VNDR_CNTCT_PHN	Click Telephone on the Contacts page.	Enter a contact's telephone information.
Policy Information	VNDR_POLICY	Set Up HRMS, Product Related, North American Payroll, AP-Vendor, Vendor Information	Enter information about policies and whom to contact about them.
Garnishment Payee	GVT_GARN_PAYEE	Set Up HRMS, Product Related, North American Payroll, Garnishments, Payee Table USF	Enter garnishment payee contact information for U.S. federal government.
Deduction Distribution Information	GVT_GARN_DIST_SEC	Click the Distribution Information button on the Garnishment Payee Table page.	Enter garnishment payee distribution information for U.S. federal government.

Identifying Vendor Prefixes

Access the Vendor Control page.

Vendor Control

SetID: BNUSA Benefit Administration

Auto Numbering

☒ **Use Auto-Numbering**

HRMS Vendor ID Prefix:

Last Vendor ID Assigned: 0

Vendor Control page

Use Auto-Numbering

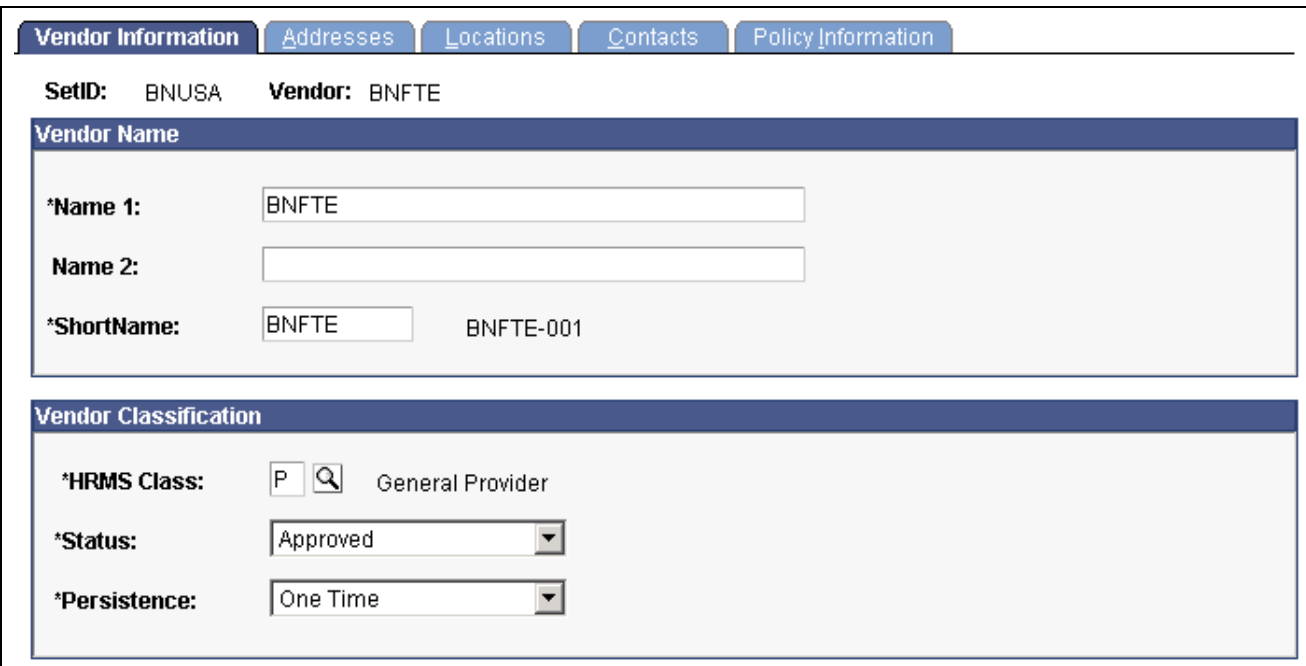
PeopleSoft Payables has the option of using an autonumbering feature to assign IDs to new vendors.

HRMS Vendor ID Prefix

If you selected the auto-numbering check box, enter a prefix that is used identify HRMS vendors.

Entering Basic Vendor Information

Access the Vendor Information page.



Vendor Information | Addresses | Locations | Contacts | Policy Information

SetID: BNUSA **Vendor:** BNFTE

Vendor Name

*Name 1: BNFTE

Name 2:

*ShortName: BNFTE BNFTE-001

Vendor Classification

*HRMS Class: P  General Provider

*Status: Approved

*Persistence: One Time

Vendor Information page

Name 1

Enter the payee name as it should appear on the check.

HRMS Class (HRMS classification)

This field identifies the HRMS classification used to create views so you see the appropriate vendors on the appropriate tables.

It is also used to identify tax and non-tax deductions when the system extracts deductions to create AP vouchers.

Available values are:

- *General Deduction (D)*
- *Garnishment Payee (G)*
- *National Health Service Provider (H)*
- *Industrial Insurance Board Provider (I)*
- *General Provider (P)*
- *Tax Collector (T)*

For benefit providers, select *P* for General Provider.

Status

For HRMS vendors, select *Approved*. The other values are used by PeopleSoft Accounts Payable.

Persistence

For HRMS vendors, select *Regular*. The other values are used by PeopleSoft Accounts Payable.

Entering Vendor Address Information

Access the Addresses page.

The screenshot shows the 'Vendor Address' page in a PeopleSoft application. At the top, there are tabs for 'Vendor Information', 'Addresses', 'Locations', 'Contacts', and 'Policy Information'. The 'Addresses' tab is active. Below the tabs, the vendor information is displayed: 'SetID: BNUSA', 'Vendor: BNFTE', and 'BNFTE'. The main section is titled 'Vendor Address' and contains a table with one address. The address details are shown below the table, including 'Effective Date: 01/01/1980', 'Status: Active', 'Country: USA', and 'Address: 4460 Hacienda Dr, Pleasanton, CA 94588'. There are also links for 'Alternate Names', 'Telephone', and 'Email ID'.

Vendor Information - Addresses page

Address Type

Enter the one or more addresses for the vendor.

If you are using PeopleSoft Payables at least one address should be the remittance address. This is the address that is used when creating payment vouchers.

Premium Payment and *Remittance* are the only valid address types for deduction recipients. If any other address type is displayed for this vendor, contact your Accounts Payable department.

Premium Payment generally applies to benefit deductions and *Remittance* applies to all other types of deductions including taxes.

Displaying Alternate Names for Use on Payments

Access the Alternate Names page.

Alternate Names	
Alternate Name 1:	
Alternate Name 2:	

Alternate Names page

**Alternate Name 1 and
Alternate Name 2**

When the system generates payments for the location using this address, PeopleSoft Accounts Payable needs to use a name different from the one entered on the Vendor Information page, enter the name here.

Identifying Vendor Locations

Access the Provider/Vendor Table - Locations page.

Vendor Information - Locations page

Location

Enter an identifier for the location information you are entering. If more than one location is set up for the vendor, you can use the previous page and next page links on the Vendor Location bar to display information for the location in which you're interested.

Default

Select this check box if you want this location to automatically print on the vouchers for this vendor. Only one location can be selected as the default.

Remit Vendor

This is the information about the vendor to whom payments will be sent. You need to select the codes that identify the name of the vendor receiving the payments, vendor location, and address where the payment is sent.

Bank Accounts

Click this link to display the Bank Accounts page. Work with the Payroll department to set up this information.

Comments Click this link to display the Comments page.

Payment Options Click this link to display the Payment Options page. Work with the Payroll department to set up this information.

Entering Bank Account Information

Access the Bank Accounts page.

Bank Accounts

SetID: BNUSA Vendor: BNFTE Location: TEST FLOOR

Vendor Bank Accounts Find | View All First 1 of 1 Last

☐ Default Description:

Bank ID Qual:

Branch ID: Bank ID:

Acct Type:

Account #: Check Digit:

DFI Qualifier: DFI ID:

[Bank Address](#) [Phone Details](#)

Bank Accounts page

Default The Default check box is selected if this is the default bank account for the location. The default bank account is copied to each payment schedule for this vendor.

Bank ID Qual The country-specific numeric value by which the bank/counterparty is identified. This value controls how the bank/counterparty pages edit and display bank information.

Branch ID The branch ID for the bank, if appropriate.

Bank ID The Bank ID for the bank.

Acct Type The account type for the bank, *Bond*, *Checking Account*, and *Life Insurance*, for example.

Account # The vendor's bank account number.

Check Digit The check digit used by the bank.

DFI Qualifier If you make automatic clearing house (ACH), wire, or EFT payments to this vendor location, this field should display the appropriate DFI Qualifier: The value determines the format for the DFI ID field.

- *Transit Number*: The DFI ID is exactly 9 digits, plus check digit calculation.

- *Swift ID*: The DFI ID is 8 or 11 characters; positions 5 and 6 must be a valid 2-character country code.
- *CHIPS ID*: The DFI ID is 3 or 4 digits.
- *Canadian Bank Branch/Institute and Mutually Defined*: No validation for DFI ID.

The DFI Qualifier determines the format of the bank's DFI ID.

DFI ID

The bank's DFI ID. The format is determined by the value displayed in the DFI Qualifier field.

Bank Address

Select Bank Address for the Bank Address page.

Phone Details

Select Phone Details for the Phone Details page.

Entering Payment Processing Information

Access the Payment Options page.

Payment Options

SetID: BNUSA **Vendor:** BNFTE **Location:** TEST FLOOR

Payment Control ☐ Hold Payments ☒ Separate Payment	Bank Bank ID: Bank Account:
Payment Handling *Flag: Default from Higher Level Code:	Payment Method *Flag: Default from Higher Level Code:

Payment Options page

Payment Control

Hold Payments

If this check box is selected, PeopleSoft Payables automatically places payments for this vendor on hold.

Separate Payment

If this check box is selected, PeopleSoft Payables creates a separate payment for each voucher, even if the system processes multiple vouchers for the vendor in the same pay cycle.

Bank

Bank ID

The code for the bank from which you want to make payments for this vendor.

Bank Account

The account from which payments will be made to this vendor.

Payment Handling

Flag

This field determines the payment handling instructions.

- *Default from Higher Level:* The payment handling instructions for the vendor come from the control hierarchy.
- *Specify at this Level:* The payment handling instruction for the vendor appears in the Code field.

Payment Method

Code

If you select Specify at this Level in the Flag field, this field displays the payment handling instructions your accounts payable department follows when issuing payments for this vendor:

- *High Dollar Processing.*
- *Internal Distribution.*
- *Regular Payments.*
- *Route to Purchasing.*

Payment Method

Flag

This field determines the payment method:

- *Default from Higher Level:* The payment method for the vendor comes from the control hierarchy.
- *Specify at this Level:* The payment method for the vendor appears in the Code field.

Code

If you select Specify at this Level in the Flag field, this field displays the payment method for this vendor:

- *Automatic Clearing House.*
- *Customer Initiated Draft.*
- *Direct Debit.*
- *Draft - Customer EFT.*
- *Electronic Funds Transfer (EFT).*
- *Giro - EFT.*
- *Giro - Manual.*
- *Letter of Credit.*
- *Manual Check.*
- *System Check.*
- *Treasury Wire Flat File.*
- *Vendor Initiated Draft.*

- *Wire Report.*

Entering Vendor Contact Information

Access the Contacts page.

Vendor Information - Contacts page

Sequence No (sequence number)

This number is automatically assigned to this contact.

Type

Select the type of contact.

Address

Select one of the addresses that you entered on the Addresses page.

URL

Enter the contact's website address.

Telephone

Click this link to display the Provider/Vendor Table - Contacts: Telephone page.

Entering Benefit Policy Information

Access the Provider/Vendor Table - Policy Information page.

Vendor Information | Addresses | Locations | Contacts | **Policy Information**

SetID: BNUSA Vendor: BNFTE BNFTE

Policy Information Find | View All First 1 of 1 Last

*Group Number: 12345 Policy Number: 123123 + -

Policy Begin Date: 01/01/1980 Policy End Date: + -

Policy URL ID

General Policy URL ID: [] []

Authorized Providers URL ID: [] []

Policy Contacts Customize | Find | View All | [] First 1 of 1 Last

Sequence	Contact Name
[] []	

+ -

Policy Information page

- General Policy URL ID** Select the vendor's website address that provides general policy information.
- Authorized Providers URL ID** Select the vendor's website address that contains a list of authorized participating providers.
- Sequence** Select a contact from the list of contacts that were entered on the Provider/Vendor Table - Contacts page. After you select the contact, the Contact Name automatically appears.

(USF) Entering Garnishment Payee Contact Information

Access the Garnishment Payee page.

Garnishment Payee

***Payee Name:**

Address 1:

Address 2:

Address 3:

Address 4:

City:

County:

State:

Postal Code: **Country:**

Contact Name:

Telephone:

Distribution Information

Garnishment Payee page

Distribution Information Click this button to access the Deduction Distribution Information page.

(USF) Entering Garnishment Payee Distribution Information

Access the Deduction Distribution Information page.

Deduction Distribution Information

Payment Information

Payment Method:

EFT

Payee Name:

Payee ID:

Electronic Funds Transfer Info

Routing Number:

Account Number:

Account Type:

Check Address Information

Country:

USA

United States

Payee Name:

Address 1:

Address 2:

City:

Zip:

State:

Deduction Distribution Information page

Enter the payment information.

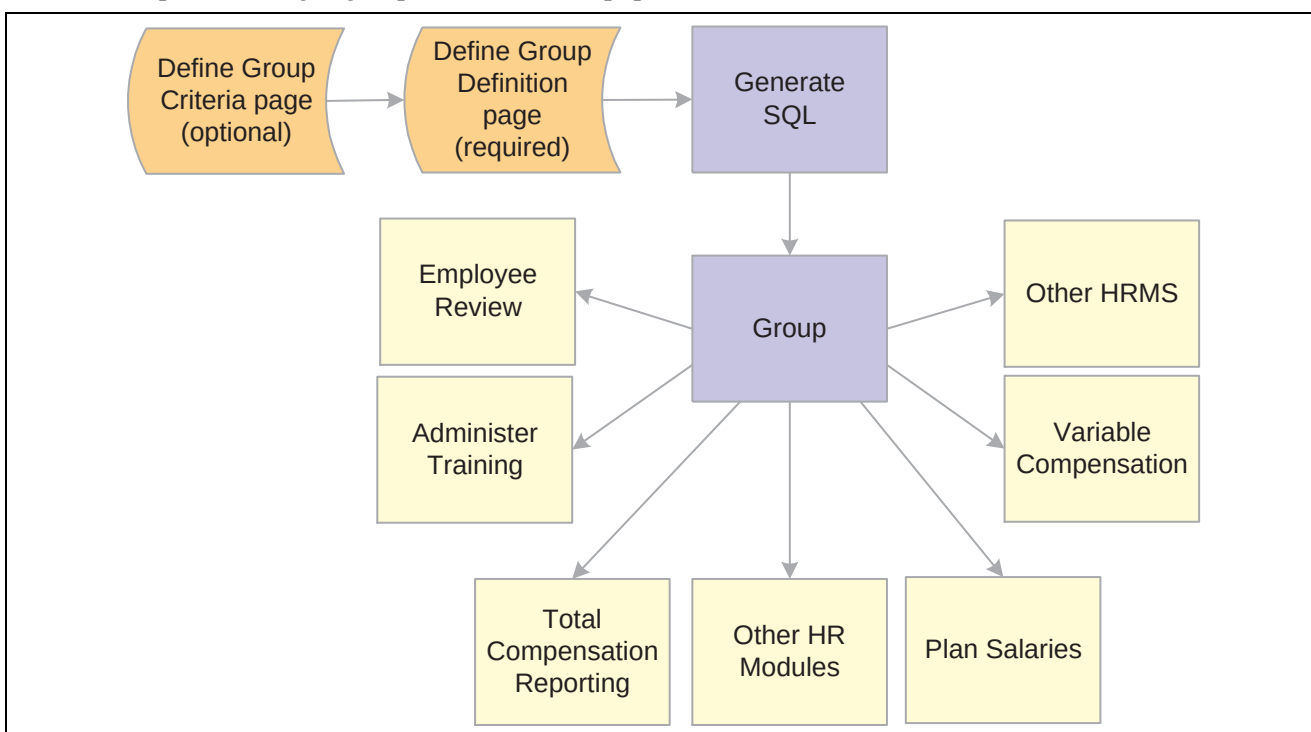
CHAPTER 20

Setting Up Groups

This section tells you how to set up group definitions and group security.

Setting Up Group Definitions

The first step in creating a group is to define its population.



Steps in setting up group definitions

To define a group's population:

1. (Optional) Create a group criteria on the Group Criteria page.

Group criteria are like building blocks of records and fields that you can use repeatedly to create different groups. For example, if your organization operates several business processes based on employees' department and union memberships, you may want to create a group criteria ID called DEPT AND UNION CODE. Once you've created the group criteria ID, you can use it to define a variety of groups.

Record Name	Field Name
Job	Department
Job	Union Code

You can create a group criteria ID using any field from the following seven records:

- JOB
 - JOB_JR
 - COMPENSATION
 - EMPLOYMENT
 - PERSONAL_DATA
 - PERS_DATA_EFFDT (effective-dated personal data)
 - TL_EMPL_DATA (employee time profile from PeopleSoft Time and Labor)
2. (Optional) Attach a group criteria ID or query to the group definition on the Group Profile page.
- On the Group Profile page, you can use a group criteria ID and queries as part of a group's definition.
- Using a group criteria ID

If you use a group criteria ID, you can define additional records, fields, and field values on the Group Definition page. You can refine the group even further by attaching a query definition. However, you can use only one group criteria per group.
 - Using PeopleSoft Query

If you use PeopleSoft Query, you can choose an existing query or create a new one. Using queries provides access to a broader set of system records than the six records that are available through the Group Criteria page or Group Definition page. However, a query must follow certain rules to be used in a group definition. You can attach only one query to a group definition.
3. (Required) Define the group by selecting records, fields, and field values on the Group Definition page.
- If you included a group criteria ID in the group definition, you must use the Group Definition page to attach the appropriate field values to the fields and records in the Group Criteria. You can also add any other records, fields, and values that you want to include in the group's definition. If you've included a query in the group definition, you can't make any further selections on the Group Definition page.
- You can also define a group entirely on the Group Definition page, without attaching a group criteria or query.

Note. If you are using PERSONAL_DATA, application messaging updates the PERSONAL_DATA record with data from the PERSON record but this update is not in real time, meaning that recent new hires may not be included in a group based on PERSONAL_DATA. Follow the appropriate instructions to ensure that recent new hires are included in your group.

If you have not already defined the group run the Refresh PS_PERSONAL_DATA table and then create the group definition and click the Launch Count button on the Group Definition page.

If you have already defined the group run the Refresh PS_PERSONAL_DATA table, then run the Group Results Purge process. Click Launch Count on the Group Definition page for that group.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information,” Updating Personal Data

PeopleTools PeopleBook: Query

Pages Used to Define Group Criteria

Page Name	Object Name	Navigation	Usage
Group Criteria	GB_GRP_CRIT1_TBL	Set Up HRMS, Common Definitions, Group Build, Group Criteria	Define the records and fields that you want to use to create a group criteria ID, which is a building block that you combine with other elements to build a more complex group.
Group Criteria - Comments	GB_GRP_DEF1_SEC	Click the Comments button on the Group Criteria Definition page.	Enter free-form comments about a Group Criteria definition.
Group Profile	GB_GRP_DEF1_TBL	Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition	Attach an existing group criteria ID and/or attach a query to a group definition. To attach a group criteria ID or query to the group definition, you must already have created the group definition.
Group Build Definition View	GB_GRP_DEF1_SEC	Click the Comments button on the Group Definition - Group Profile page.	View the records, fields, values, and operators that you've defined for the group.
Group Definition	GB_GRP_DEF2_TBL	Set Up HRMS, Common Definitions, Group Build, Group Build - Group Definition	Define the records, fields, and field values to associate with a group. To attach a Group Criteria ID or a query to the group, you must have defined the Group Criteria and entered its ID on the Group Definition - Group Profile page.
Group Result	GB_GROUP_RES_SEC	Access from the Group Definition page.	View and sort the members of the groups that you've built on the Group Build pages.

Defining a Group Criteria

Access the Group Criteria page.

Group Criteria

Group Criteria ID: HVC1

Description: Group Criteria for VC

Short Description: VC Grp
[Comments](#)

Criteria Definition

Customize | Find | View All | First 1-2 of 2 Last

			*Record	*Field Name	*Field Label	Edit Table		
1			JOB	DEPTID	Department	DEPT_TBL		+
2	AND		JOB	PAYGROUP	Pay Group	PAYGROUP_TBL		+

Group Criteria page

AND/OR

This field appears only if you add a second row of data to the page. Use it to tell the system how to process the records and fields that you enter on this page. Values are *AND* (the default) and *OR*.

(

Create sets or subsets of linked records and field names. Using parentheses helps avoid ambiguity when you create several AND/OR conditions. You can create up to five nesting levels. The system displays a list of values. The default is *none*.

Record

Select the record name to include in the group criteria definition. The system displays a list of valid record names.

Field Name

Enter the field name to include in the group criteria definition. The system displays a list of valid field names for the record that you selected in the Record field.

Note. If you enter a field name that is keyed to other fields, the system displays the other fields that you must enter to finish defining the field. For example, to build a group that is based on a particular Salary Step, you must also specify the SetID, Salary Plan, and Salary Grade.

Field Label

The system fills in this field when you press TAB to move out of Field Name. You can change the entry.

Edit Table

The system uses edit tables to validate the data that you enter in certain fields. If the field name you entered is linked to an edit table, the system fills in this field when you press TAB to move out of Field Name.

)

Complete a nesting statement that links multiple records and fields together. The system displays a list of values.

Attaching a Group Criteria ID to the Group Definition

Access the Group Profile page.

The screenshot shows the 'Group Definition' tab in the 'Group Profile' page. The 'Group ID' is 'EI003'. The 'Effective Date' is '01/01/1990'. The 'Status' is 'Active'. The 'Group Criteria ID' is empty. The 'Description' is 'EI003'. The 'Short Description' is 'EI003'. The 'Query Name' is empty. The 'Manager ID' is 'E302' with the name 'Bains, Eric'. The 'Approver EmpID' is 'E300' with the name 'Luner, Jamie'. There are checkboxes for 'Complex Group - Batch Process' and 'Avail to Manager Self-Service'. A 'Refresh' button is also present.

Group Profile page

Group Criteria ID

To include an existing group criteria in this group definition, enter the ID here. Otherwise, leave the field blank. You can include only one Group Criteria ID in a group.



If you changed the Group Criteria ID, click the Refresh button to repopulate the Group Definition page with new values.

Complex Group - Batch Process

Select if you want to select batch processing for complex groups that take a long time to build online. Batch processing can take place at off-peak times when you don't need your system for other purposes.

PeopleSoft Process Scheduler handles batch processes, so be sure that your process scheduler is up when you select this check box. Process Scheduler notifies you when processing is complete. If you need a status on scheduled group execution, see the Group Definition - Group Results page.

Avail to Manager Self-Service

Select this check box if you plan to use Group ID as an access type for any manager self-service transaction.

Comments

Click this link to enter free-form comments on the Group Definition - Group Build Definition View page. Below the Comments area, the system displays the records, field names, operators, and values that you have defined for this group.

Query Name

To include an existing query in this group definition, enter the query ID here. Otherwise, leave the field blank.

Warning! When you open the drop-down list in this field, all existing queries appear. However, the Group Build process works only with queries that produce a group that is keyed by employee ID. Some queries in the drop-down list may not meet this requirement. If you try to run a query that doesn't produce a group of employee IDs, the system displays an error message, and the query fails.

Manager ID

Designate the group's manager, if applicable. For example, if the group you're defining consists of all employees in department 10200,

enter the department manager's ID here. You can also use this field to designate the leader of a project team.

Manage Variable Compensation uses the group manager ID to determine who can access the Award Allocation page when a plan is managed with groups.

If you selected the Avail to Manager Self-Service check box, Manager ID is required.

Approver EmplID
(approver employee ID)

If you're planning to use this group in the Variable Compensation Administration by Groups module, enter the employee ID of the person who approves awards for this group. The system displays a list of values.

If you selected the Avail to Manager Self-Service check box and are using workflow with self-service transactions, , Approver EmplID is required.

See Also

PeopleTools PeopleBook: Query

Viewing Records, Fields, Values, and Operators for a Group

Access the Group Build Definition View page.

Group Build Definition View

Comment:

Where Clause				Customize	Find	View All	First	1-2 of 2	Last	
	{	Record (Table) Name	Field Name	Operator	Values List	}				
		JOB	EFFDT	CURR						
AND		JOB	DEPTID	=	(EBGEN)E003					

Group Build Definition View page

Where Clause

Enter a where clause (optional). See the field descriptions on the Group Criteria page.

See [Chapter 20, "Setting Up Groups," Defining a Group Criteria](#), page 388.

Using Queries to Refine Groups

Using PeopleSoft Query to refine a group in the Group Build component enables you to access many more tables than the seven that are available in the Group Build component.

Defining Queries for Group Definitions

When you define a query to use in group definitions, the following rules apply:

- You must insert a special Group Build view into the query.

The system uses this view, GB_QRY_LINK_VW, to merge SQL statements that are created in the Group Build pages with the SQL statements that are created by PeopleSoft Query.

- A record that you add in PeopleSoft Query must have at least one criterion.
- You can't define fields that are returned by the SQL statement.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You can't use a prompt as an expression.

You can use only Field Name, Expression, Constant, In List, Current Date, and Effective Seq (effective sequence).

See Also

[Chapter 21, "Working With Groups," Building Applications or Batch Programs That Include Group Build Functions](#), page 408

Defining Records, Fields, and Field Values for a Group

Access the Group Definition page.

The screenshot displays the 'Group Definition' page for Group ID EI003. The page is divided into several sections:

- Group Definition Header:** Includes 'Group ID: EI003', 'Effective Date: 01/01/1990', 'Status: Active', and 'Count Result: 0'. There are navigation links for 'Find', 'View All', 'First', '1 of 1', and 'Last'.
- Where Clause:** This section contains a table with columns for '*Group Left Parenthesis', 'Record', 'Field Name', and '*Group Right Parenthesis'. The record 'JOB' is selected, and the field 'EFFDT' is entered. The operator is set to 'Current', and the label is 'Effective Date'. There are also buttons for '+', '-', and 'Edit Table'.
- Values:** A section at the bottom with a 'Customize' link and navigation links for 'Find', 'View All', 'First', '1 of 1', and 'Last'. It currently shows a 'Date' value.

Group Definition page

This page is the only page that you must complete to build a group. You can use this page in combination with the Group Criteria Definition - Group Criteria page and the Group Definition - Group Profile page or you can build a group entirely on this page. You can use this page in any of the following ways:

- If you entered a Group Criteria ID on the Group Profile page.

The system populates the Group Definition page with the record and field names from the Group Criteria page. You can't change the record and field names on this page. The system displays the Imported from Group Criteria check box when the fields are imported from the group criteria. To finish defining the group, complete the parameters by entering the appropriate field values for each field name in the Criteria Definition group box on the Group Criteria page. You can add more records, field names, and field values to the definition.

- If you entered a query on the Group Profile page.

You can't refine a group that is based on a query.

- If you aren't using a Group Criteria ID or a query.

Define the group entirely on this page. Enter all the records, field names, and field values that you'll use to build the group.



After you save the page, click the Launch Count button to compute how many members are in the group. If you selected the Complex Group - Batch Process check box on the Group Definition - Group Profile page, clicking Count sends the group to PeopleSoft Process Scheduler to be generated.

If this is a complex group that you have already generated, clicking Count retrieves the number of rows in the group.

Count Result

When you click the Count button, the system displays the number of members in the group. If you used effective-dated records in the group definition, the group might include more than one row of data per employee. Each data row counts as one item in the Count Result.



Click the Group Visualize button to build the group and to access the Group Result page, where you get a list of all group members.

Comments

Click this link to enter comments about the group on the Group Definition - Group Build Definition View page.

Record

Enter the name of the record that you want to use to define the group. The system displays a list of valid record names. If this field is populated by a Group Criteria definition from the Group Definition - Group Profile page, you can't change the entry. If the record that you select is effective-dated, when you move out of the field, the system asks whether to build the group based on the current information or on all the history data.

Field Name

Enter the name of a field to use to define the group. The system displays a list of values for the record that you entered in the Record field. If you entered a group criteria ID on the Group Definition - Group Profile page, the system populates this field, and you can't change the entry.

Label

The system populates this field when you move out of the field. If you entered an effective-dated record and chose to build the group based on the current information, the system selects the most current record.

Operator

Define the field values to include in or exclude from the group. See the following Valid Operators table.

Note. (*JPN*) If you define groups for use in Japanese processes such as Seniority Pay or Salary Increase, we recommend that you do not set the Operator for Job – Effective Date to *Current*. If you select *Current*, you may not get the results you want when you run processes that are backdated. Provided Effective Date is not set to *Current* here, you can run processes to extract other than current data by using the As of Date on the process page.

Edit Table

The system uses edit tables to validate the data that you entered in certain fields. If the Field Name that you entered is linked to an edit table, the system populates this field.

Note. If the Field Name that you entered is keyed to other fields, the system displays the other fields that you must enter to finish defining the field. For example, if you want to build a group based on a particular Salary Step, you must also specify the SetID, Salary Plan and Salary Grade.

Value

Select a field value from the list.

Valid Operators

Operator	Description
<	Less than.
<=	Less than or equal to.
<>	Less than or greater than.
=	Equal to.
>	Greater than.
>=	Greater than or equal to.
Between	
Current	
EFFDT<	Effective date is less than.
EFFDT<=	Effective date is less than or equal to.
EFFDT>	Effective date is greater than.

Operator	Description
EFFDT >=	Effective date is greater than or equal to.
In List	
Is Null	Field value equals 0.
Like	
Max	Maximum.
Min	Minimum.
Not Btw	Not between.
Not Equal	
Not In	Not In List.
Not Like	
Not Null	Field value does not equal 0.

Defining Groups With Effective-Dated Data

Several records that you use to define a group are effective-dated:

- Job
- Effective-Dated Personal Data
- Time and Labor Employment Data
- Compensation

The system stores both current and historical data for these records, so you can build groups with them in two ways:

- Using current data.

For example, selecting only an employee's current job and leaving out the previous jobs. The system adds the condition *Current* to the record's effective date.

- Using history data.

For example, including all the jobs that the employee has held in your organization. The group can include multiple rows of data for one employee. If you don't place any conditions on the effective date when you define the group, the system pulls all the historical data as of the current system date.

If you create a group definition that includes two effective-dated records, you can link the two records by effective date. The following table shows how to link two effective-dated fields.

Operator	Description
Effdt<=	Effective date is less than or equal to.
Effdt>=	Effective date is greater than or equal to.
Effdt<	Effective date is less than.
Effdt>	Effective date is greater than.

Viewing and Sorting Group Members

Access the Group Result page.

Group Result

Search On Name: ID:






1 to 8 of 8

Sort group by:
☒ EmplID ☐ Name



Group Employees						
EmplID	Name	Empl Rcd#	Job Code	Job EffDt	Job EffSeq	Description
EISO1	Bains, Eric	0	E003	08/10/1995	0	ST - Manager of IS
EISO2	Bridges, Nash	0	E011	08/15/1995	0	ST- HR Clerk
EISO3	Johnson, Don	0	E011	09/10/1995	0	ST- HR Clerk
EISO4	Cheech, Marin	0	E011	09/15/1995	0	ST- HR Clerk
EISO5	Malone, Sam	0	E011	09/22/1995	0	ST- HR Clerk
EVC14	Yoshi, Shimada	0	E001	10/20/1993	0	ST - Manager of Human Resource
EVC15	Michellie, Vigil	0	E001	03/15/1993	0	ST - Manager of Human Resource
EVC16	Cecilia, Distefano	0	E001	04/16/1993	0	ST - Manager of Human Resource

Group Result page

Using Group Member Chunking Controls

Because the number of group members could be very large, the system loads members into this page in chunks. You can determine the number of rows in a chunk in the Maximum Number of Rows for Scrolling field on the Installation Table. You manage the display of chunks using filters and navigator buttons.

Filters enable you to enter search criteria for identifying a chunk of members. You can enter information into one or more of the filter fields to narrow your search.

Important! Group Build automatically joins the JOB, COMPENSATION, and EMPLOYMENT tables. To compare the group results from this page with the results of a query that you launched from your SQL editor, add the joins to those three records in your SQL editor to ensure that the results are comparable.

When you click the count button, Group Build Definition gives the system date as parameter. For example, the Group Build Definition adds the condition `JOB.EFFDT <= Given Date` is added in the generated SQL, even if you did not define any dates criteria in the Group Build Definition.

Use the following filters and navigator buttons to move from one chunk of members to another:

Search on Name	Enter one or more letters in this filter field to instruct the system to populate the page with employees whose last names begin with the letters that you entered. You can use the wild card % to help select a record. For example, to search for all employees named John enter <i>%John</i> .
ID (employee ID)	Entering one or more numbers in this filter field instructs the system to populate the page with employees whose employee IDs begin with the numbers that you entered.
Sort Group by	Select whether you want the members to appear in order by EmplID (employee ID) or Name.
	Click the Search button to display the results of a new search. The field to the left of the Search button shows which rows are visible compared to the total number of rows. For example, <i>1 to 4 of 4</i> means that rows 1 through 4 are displayed out of a total of 4 rows.
	Click the Refresh Search Fields? button to clear all previously entered search criteria from the filter fields.

Setting Up Group Security

Because groups can cross departmental lines, groups have their own security structure that is separate from departmental security. Group security overrides departmental security. For example, a user who does not normally have access to department 10100, but who has access to a group that includes department 10100, can see all group members, even those who belong to that department. This makes security factors an important consideration when you set up groups.

This section discusses how to:

- Set up default component access.
- Set up security by group.
- Set up security by operator.
- Translate your company and department structure into group format.

Pages Used to Set Up Group Security

Page Name	Object Name	Navigation	Usage
Group Security Default	GB_GROUP_DFT_TBL	Set Up HRMS, Common Definitions, Group Build, Group Security Default	Manage group access to pages in your system. Specify which components in your system can use or refer to groups that are created in the Group Build component.
Security By Group	GB_GRP_SEC_TBL	Set Up HRMS, Common Definitions, Group Build, Security by Group	Control security access to a group and to components that are used by the group.
Security By Operator	GB_OPR_SEC_TBL	Set Up HRMS, Common Definitions, Group Build, Security By Operator	Control an operator's security access to various groups and components.
Group Build From Co. & Dept (group build from company and department)	RUNCTL_GBP003	Set Up HRMS, Common Definitions, Group Build, Group Build From Co./Dept.	Translate your existing company and department structure into group format.

Setting Up Default Component Access

Access the Group Security Default page.

Group Security Default

Default Panelgroup Find First 1-163 of 163 Last

Component Name			
BUDGET_COMPARE_INQ		☒ System Data	
COMP_RATECD_TBL		☒ System Data	
CO_DPK_CATEGORY		☒ System Data	
CO_DPK_SUPPLIER		☒ System Data	
CO_ESV_EXTRACT		☒ System Data	
CO_ESV_SUPPLIER		☒ System Data	
CREATE_USERS		☒ System Data	
EE_NO_CURR_RWW_INQ		☒ System Data	
EE_REVIEW_BY_GROUP		☒ System Data	
EE_REWW_RESLT_INQ		☒ System Data	
EP_DESIREDDIST		☒ System Data	
EP_DISTRIB_SUM		☒ System Data	
EP_LATE_APPR		☒ System Data	

Group Security Default page

Component Name

The system populates these fields with a list of the standard PeopleSoft Human Resources components that refer to groups. This can occur in one of two ways:

The page contains a field that prompts the user to supply a group ID.

The page displays a list of people who belong to a particular group.

When you define group security for a particular group or operator, you can import this default list into the Security By Group and Security By Operator pages. Then you can selectively delete components to make them unavailable to that group or operator.

To keep a particular component from appearing on the Security By Group or Security By Operator page, delete its name from the list.

System Data

Select to specify whether a component is a standard component that is delivered by PeopleSoft as system data or a modified component that is created for your installation. This check box is selected if the system supplies the data and cleared if the component is modified. You can't change this field.

Setting Up Security By Group

Access the Security by Group page.

Security By Group page

Group ID

The ID of the group for which you will control security. You can't change this field.

Effective Date

The date when the security configuration will take effect. The system defaults to today's date. Change the date to grant security access as of a different date.

User ID

Enter the ID of a user whose group access you want to change. The system displays a list of valid user IDs.



If you know an employee's employee ID but not the matching user ID, click the Get Employee ID button to search for the employee's user ID. The system displays the Search Operator ID box. Enter the employee ID and click OK to add the employee's user ID to the operator list, if it isn't already on the list.

If you don't know the employee's ID, you can search for it by leaving EMPLID (employee ID) blank and clicking the drop-down arrow. The system displays a Valid Values page that you can use to search for the employee ID you want.

Status

Select *Active* to grant the operator access to the group or *Inactive* to remove the operator's access.

Component Name

Enter the name of the component that you want to include in the operator's security status. The status that you assign to the operator will apply to that component. The system displays a list of valid values.

Default

Click this button to assign this operator access to the current group from any component that listed on the Group Security Default page. The system displays the components you've selected.

See [Chapter 20, "Setting Up Groups," Setting Up Default Component Access](#), page 398.

Setting Up Security By Operator

Access the Security By Operator page.

Security By Operator

User ID	The user ID of the operator whose security access you set on this page. You can't change this field.
Effective Date	The date that the security configuration takes effect. The default is today's date. To grant security access as of a different date, change the date.
Group ID	Enter the ID of the group to which you want to control this operator's access.
Status	Select <i>Active</i> to grant the operator access to the group or <i>Inactive</i> to remove the operator's access.
Component Name	Enter the name of a component to set the operator's security access in this component to the group that you entered in the Group ID field.
Default	Click to assign the operator's security access for the group that you entered in the Group ID field to all components listed on the Group Security Default page. The system displays the components you've selected. See Chapter 20, "Setting Up Groups," Setting Up Default Component Access , page 398.

Creating Groups From Departments

If your organization has a departmental security structure, creating a parallel structure for groups could involve redoing a great deal of existing work. To minimize duplication of effort, PeopleSoft provides an automated process for translating your departmental structure into group format. On this page, you create new groups that correspond to your existing company, setID, and department structure. For example:

- Department 10100 in SetID USA becomes Group USA 10100.
- Department 10200 in SetID USA becomes Group USA 10200.
- Company CCB becomes Group CCB.

Any user who has access to the departments has access to the new groups. For example, a user who has access to department 10200 in SetID USA has access to the new Group USA 10200.

CHAPTER 21

Working With Groups

This chapter provides an overview of working with groups and tells you how to:

- Refine groups.
- Purge group results.
- Build applications or batch programs with Group Build functionality.

Understanding Group Build

The Group Build feature provides a standard way to create groups of employees and non-employees in PeopleSoft Human Resources. Once you've created a group, you can use it for a variety of purposes.

You might want to apply a business process to a group of individuals that crosses job, department, or even company lines. For example, you might want to offer a special bonus plan to your organization's research and development teams. The group includes everyone in departments 10200 through 10500. Using the Group Build feature, you can create a group consisting of departments 10200 through 10500 and administer the group's incentive plan using the Variable Compensation module. Later, someone else can administer salary increases to the same group using the Plan Salaries module. You define the group only once.

You can define groups with the Group Build component and use those groups in PeopleSoft Payroll for North America, Benefits Administration, Stock Administration, and any of the following PeopleSoft Human Resources modules:

- Salary Planning
- Salary Forecasting for France (*La Masse Salariale*)
- Total Compensation Reporting
- Variable Compensation
- Employee Review
- Training Administration

Creating a Group

Creating a group in PeopleSoft Human Resources involves three steps. These steps are designed for experienced users who are familiar with the record and field structures in PeopleSoft Human Resources:

1. Defining the population that belongs to the group.
2. Setting up group security.

3. Refining dates and other module-specific parameters in individual PeopleSoft modules (if necessary).

Use Group Build pages to:

- Select the records, fields, and values that define the group.
- Set up the group's security.

Set up the group's date parameters in the Planning Salaries module.

To use the same employee review group later in the Variable Compensation module, just link the existing group ID to a node in the Variable Compensation Group Tree in the Variable Compensation module.

Creating Groups That Include Non-Employees

You can create groups that include both employees and any non-employees who have employee IDs and personal data records in the system. To select non-employees in groups, use the value *N* (non-employee) in the PER_STATUS (personnel status) field.

If you use the Monitoring Health and Safety module, your system may include some non-employees who do not have personal data records, but are tracked in a special record called NE_PERSONAL_DTA. These non-employees are not eligible for inclusion in groups.

Groups for Variable Compensation

Group build comes with a group ID of No Group that is required for Variable Compensation processing. The group ID NOGROUP is used for Variable Compensation plans without groups. It is a reserved group ID, and you cannot create a Group ID = "NOGROUP" in the Group Build module.

Refining Groups in PeopleSoft Modules

The refinement of group members takes place at the module level. You can define a group as of:

- A point in time.
- A period of time.

See Also

Chapter 21, "Working With Groups," Building Applications or Batch Programs That Include Group Build Functions, page 408

Viewing Group Results

When you define a group through the Group Definition component, you don't specify any time limits on group membership, so some groups may have very long lists of members. To help manage these potentially unwieldy groups, PeopleSoft provides an inquiry page and reports that you can use to view group members.

See Also

Chapter 21, “Working With Groups,” Running Group Build Reports, page 405

Page Used to View Complex Group Results

Page Name	Object Name	Navigation	Usage
Complex Group Results Summary	RSLT_SMRY_PNL	Set Up HRMS, Common Definitions, Group Build, Complex Group Results Summary Panel	View the status of the complex groups that you created in the Group Definition component. You must already have run the batch process to create the group.

Viewing Complex Group Results

Access the Result Summary Panel.

You can designate any group as a complex group by selecting the Complex Group - Batch Process check box on the Group Definition - Group Profile page. The system creates complex groups by batch process and notifies you when processing is complete.

Group ID	Enter the ID of the group whose members you want to view.
Group As Of Date	Since group definitions are effective-dated, you may have defined several versions of the same group for different dates. Enter the effective date to specify the group definition that is valid as of this date. The report lists the members who belong to the group as of the current date.

Running Group Build Reports

This section discusses how to run the group build reports.

Common Elements Used in this Section

Group ID	Enter the ID of the group whose members you want to view.
As Of Date	The report lists the members who belong to the group as of the current date, or as of the date you specify in the Refinement Date field.
Refinement Date	If the group definition includes effective-dated records, enter the date for which you want the records run. For instance, you might want to run a group with an effective date of 1/1/1990, but run the effective-dated rows in the group as of 2/15/1998. In that case, you would select a Group As of Date of 1/1/1990 and a Refinement Date of 2/15/1998. If you leave this field blank, the system will run the group as of the current date.

Pages Used to Run Group Build Reports

Page Name	Object Name	Navigation	Usage
Group Overlapping	RUNCTL_GBP001	Set Up HRMS, Common Definitions, Group Build, Group Overlapping	Run the Group Member Overlapping report (GBP001). This report lists individuals who belong to multiple groups.
Group Membership	RUNCTL_GBP002	Set Up HRMS, Common Definitions, Group Build, Group Membership	Run the Group Membership report (GBP002). This report lists the members of selected groups.

Working With Group Versions

This section discusses how to work with versions of a group (for developers).

Group Versions

Each time you build a group, the system generates a version number and stores it in the Group Result Table. The system creates a new version number and updates the result table if any of the following have changed since the last time you executed the group:

- The group definition.
- The query definition.
- Any parameters that you used to generate the group; for example, if you used effective-dated job data.

Working With Versions (for Developers)

Before reading this section, see “Building Applications or Batch Programs That Include Group Build Functions.

You can implement Group Build in an application by:

- Using the default developer query.

The default developer query works with the default Group Result Table.

- Creating your own query.

If you use your own query, you can define more parameters and/or more fields in a “personal” Group Results Table.

However, you can use your own Group Results Table with the default developer query or use the default Group Results Table with your own query, as long as the fields selected by the query match the default Group Results Table structure.

This means that the system regenerates the group and changes the version number if either of the following changed since the last time you executed this group:

- The query definition that was added by the developer.

- The Group Results Table.

Note. You can bypass the versioning mechanism by calling GB_EXEC("Y"). Then the group is generated each time it is called.

Note. When using Developer Query or User Query, keep in mind that GB_QRY_LINK_VIEW is based on the JOB record. When Group Build generates the SQL, the system replaces all references to GB_QRY_LINK_VIEW with JOB. If, after this is done, the left REC.FIELD is the same as the right REC.FIELD, Group Build will not process the line in the SQL generation.

For example, if you have the criteria GB_QRY_LINK_VIEW.EFFDT <= JOB.EFFDT in Query, Group Build will replace it with JOB.EFFDT <= JOB.EFFDT. The system will then remove the line because the left REC.FIELD is the same as the right REC.FIELD. As a result, the Query count may differ from the one returned by Group Build.

See Also

Chapter 21, “Working With Groups,” Building Applications or Batch Programs That Include Group Build Functions , page 408

Purging Group Results

Each time you generate and execute a group, the system stores the results in the Group Result Table. The next time you execute the same group, the system checks to see if the group’s definition and date parameters have changed since the last time you ran the group. If they have, the system deletes the old results from the Group Results Table and saves the new results.

This section discusses how to:

- Purge usable results.
- Purge unusable results.

Pages Used to Purge Results

Page Name	Object Name	Navigation	Usage
Group Results Purge	RUNCTL_GBP004	Set Up HRMS, Common Definitions, Group Build, Group Results Purge	Delete (purge) the results of a previous version of a group from the Group Results Table.
Unusable Group Results Purge	RUNCTL_GBP005	Set Up HRMS, Common Definitions, Group Build, Group Unusable Group Results Purge	Delete the results from all of your groups from the Group Result Table. You must have saved the group you want to purge before using this page.

Purging Usable Results

Access the Group Results Purge page.

The Group Results Purge process deletes *usable groups*—groups with results in the Group Results Table that are still in sync with the current Group Definition and can potentially be retrieved by the system.

Group ID Enter the ID of a group whose results you want to purge. The system deletes the results from the Group Build results table GB_GRP_RES_TBL.

Purging Unusable Results

Access the Unusable Group Results Purge page.

The Unusable Group Results Purge process deals with *unusable groups*—groups that were generated when the group definition was different from what it is now, and the results that are stored on the Group Results Table no longer match the group definition. Group results become unusable when any of the following items change:

- The developer's query definition.
- The Group Results Table, where the group results are stored.
- The group definition.
- The user's query definition.

Building Applications or Batch Programs That Include Group Build Functions

This section provides a step-by-step method for developers, consultants, or customers who would like to build their own applications or batch programs and include Group Build functionality. It details the way to call the groups' execution from an online application and from PeopleSoft Application Engine using the delivered Group Build application interfaces (APIs).

This section discusses how to:

- Implement PeopleCode API calls.
- Implement PeopleSoft Application Engine API calls.
- Develop client-specific workflow.

Implementing PeopleCode API Calls

This section discusses what a developer must do to use Group Build in the module that he or she is building. (We refer to this module as the client module.)

Note. Please read this entire section before performing any steps.

To Implement PeopleCode API calls:

1. (Optional) Set up a Group Build results table.

Group Build provides a standard Group Results Table called GB_GRP_RES_TBL. This table contains the results of the groups that you build; its content is managed entirely by the Group Build module. This table provides a central place for storing Group Build results, so the results can be shared by all applications that use Group Build. *Do not add, delete or modify rows in this table.*

If you want a table for your module where you can add, delete, or modify rows, you must perform this optional step. Your table will be taken into account for the construction and purge processes of the Group Build module.

There are two ways to set up your own table:

- a. Log on to PeopleSoft Application Designer and clone the record GB_GRP_RES_TBL into MyClientModuleResultTable.

This record becomes your client module result table.

- b. Create a new record (MyClientModuleResultTable) into which you insert (at least) the subrecord GB_GRP_RES_SBR (the minimal structure for a modified result table). The modified results table can contain more fields than the one that is defined in the subrecord. However, you can't use the standard query «GB_DEFAULT_QUERY». You must create your modified developer query in which the additional fields appear in the «field tab». For example, if your result table is defined as DEPTID, define your modified query as follows:
 - All fields from GB_QRY_LINK_VW.
 - All of your additional fields.
2. (Optional) Add two fields on the client module record to store the group ID and group as of date. If you choose not to record this information, you can use a derived/work record (see step 3) or system variables (such as system date).

In PeopleSoft Application Designer, add two fields to the client module record (MyClientModuleRecord):

- The field GB_GROUP_ID for storing the Group ID.

This field should prompt on GB_GROUP_TBL.

- The field MyAsOfDate for storing the as of date of the group.

3. In PeopleSoft Application Designer, create a derived/work record to store your group generation button.
 - a. Create a new record (DERIVED_MyClientModule) or use an existing derived record.
 - b. Create a new field: MyClientModule_GEN_BTN.
 - c. To the DERIVED_MyClientModule record, add a new field: MyClientModule_GEN_BTN.
4. In PeopleSoft Application Designer, Include the work page GB_API_WRK in the client module component.
 - a. Open the component (MyClientModuleComponent) that contains the page (MyClientModulePage) from which you'll call the Group Build API.
 - b. Insert the page named GB_API_WRK (the Group Build work page) into MyClientModuleComponent and mark it as hidden.
5. (Optional) Using PeopleSoft Query, define the query that you might want to add to for refining your group - developer query definition.
 - a. Insert the view GB_QRY_LINK_VW (required).
 - b. Insert the record(s) that are needed for joins and criteria.

- c. Write your query according to the Group Build limitations; see “Group Build Query Limitations for Developers” later in this section.
 - d. Add all necessary prompts on the criteria tab.
Prompt values are bound using the GB_BIND API call.
 - e. Verify that your query is PUBLIC.
 - f. Save your query as MyDeveloperQueryName.
6. Add modified fields on the client module page.
 - a. Add the MyClientModuleRecord.GB_GROUP_ID field to MyClientModulePage.
 - b. Add the MyClientModuleRecord. MyAsOfDate field to MyClientModulePage.
 - c. Add the DERIVED_MyClientModule.MyClientModule_GEN_BTN group generation button to MyClientModulePage.
 7. Add PeopleCode to implement calls to Group Build API.

Warning! All calls to Group Build API must be done from level 0 of your client module page.

- a. Make calls to Group Build API in the FieldChange PeopleCode event.
 - b. Set the PeopleCode Event Properties to Application Server.
 - c. Select Application Server on the PeopleCode Event Properties page.
See “PeopleCode API Functions.”
8. Implement PeopleSoft Security to see if a group can be used in the component.
 - a. GB_GROUP_ID field must be on the page, and the recordfield properties must be set to prompt table edit on Record GB_GROUP_SEC_VW.
 - b. Add DERIVED_XXX.PNLGRPNAME and DERIVED_XXX.OPRID on level 0 of the page. The fields must be display-only and hidden.

PeopleCode API Functions

This list is a funclib (DERIVED_HR_GB.GB_API FieldFormula) for PeopleCode. Specifies which API group, query name for refinement, and results table to use.

- Specifies which group, query name, results table to use.

```
&ret_bool = GB_DECLARE(group_id, AsOfDate of the group, query_name, result_table_⇒
name)
```

- The parameter group_id is required.
- The parameter AsOfDate is required.
- The parameter query_name specifies a developer query name for refinement. It is optional. The default query name is GB_DEFAULT_QUERY (view PS_GB_QRY_LINK_VW).
- The parameter result_table_name is needed if the results table has been modified. It is optional. The default result table is PS_GB_GRP_RES_TBL. The result_table_name has to be complete; for example, « PS_MY_RESULT_TABLE ».

- Binding values.

```
&ret_bool = GB_BIND(prompt_code, value)
```

- Enables you to bind values if prompts have been defined in the modified query developer. If you're using the standard query GB_DEFAULT_QUERY, then the only value to be bound is the refinement date: use the delivered API, GB_BIND_DATE.
- The parameter prompt_code must be defined as a prompt in the developer query.
- The parameter value is required.

- Binding a date as refinement when you're using the standard query.

```
&ret_bool = GB_BIND_DATE(value)
```

- Use this function when you use the standard query GB_DEFAULT_QUERY. It enables you to bind a date (value) as a refinement.
- The parameter value is optional and specifies a refinement date. The default is %date.

- Generating and executing the SQL statement.

```
&group_version_number = GB_EXEC(refresh_flag)
```

- This API generates and executes the SQL statement.
- It returns the version number of the generated group.
- If the parameter refresh_flag is set to *Y*, the SQL statement is generated each time you call the function. If the refresh_flag is set to *N*, the function checks to see if a generated group exists and returns its version number. If the group doesn't exist, the parameter generates it. The refresh_flag is required.

- Deleting the content of the result table.

```
GB_DELETE()
```

- Disabling/enabling the generic workflow and the specific workflow.

```
GB_SET_JOB_WF(job_name)
```

- Disables/enables the generic workflow and the specific workflow according to job_name value. Specifies the job (job_name) to be scheduled in place of the default job name (used for generic workflow), if specified.
- The parameter job_name is optional.
- If the job_name is specified, then the job that is named job_name must be defined in PeopleSoft Process Scheduler, as described in the workflow section.
- Providing a non-null job_name enables the corresponding workflow. Generic workflow is disabled.
- Providing a null job_name as parameter enables the generic workflow (workflow by default).
- On FieldChange PeopleCode event of DERIVED_MyClientModule.MyClientModule_GEN_BTN, add the following code according to one of the two scenarios described below.

Scenario 1

If you implement Group Build calls using the standard Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
```

```

Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

/* Use this instruction if you plan to use GB_GRP_RES_TBL */

GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord.MyAsOfDate, «⇒
    », « ») ;

/* Bind all parameters for the default Query : The Effdt of JOB */

GB_BIND_DATE(Any Date ) ;

/* Execute the SQL and fill the group result table */

&MyVersion = GB_EXEC ( « Y » ) ;    /* <Y> Forces to rebuild the group even if⇒
    one is available */

* The list of employees for the group is now available for your own usage */

/* The code presented above populates the Group Result table GB_GRP_RES_TBL */

/* You can now use this record to populate your scrolls or can be used as a join⇒
    for a SQL Statement */

/* ADD YOUR CODE HERE */

/* Clear the group result table only in the case you know the group will not⇒
    be used anymore*/

[GB_DELETE() ;]

```

Scenario 2

If you implement Group Build calls using your own modified Group Result Table and query, the FieldChange PeopleCode for DERIVED_MyClientModule.MyClientModule_GEN_BTN looks like this:

```

Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

Declare Function GB_EXEC PeopleCode DERIVED_HR_GB.GB_API FieldFormula;

/* Give your result table name to GB_DECLARE (STEP 1 must have been previously⇒
    performed) and your Query Name if you created one */

GB_DECLARE (MyClientModuleRecord.GB_GROUP_ID, MyClientModuleRecord. MyAsOfDate,⇒
    « MyDeveloperQueryName », «MyClientModuleResultTable ») ;

/* Bind all parameters for MyDeveloperQueryName */

/* Each prompt in MyDeveloperQueryName must be binded */

GB_BIND (« :1 », MyClientModuleRecord.MyField1) ;

[...]

GB_BIND (« :n », MyClientModuleRecord.MyFieldn) ;

/* Or use local variable for binding */

```

```

GB_BIND(« :n », &MyLocalVarn) ;

/* Execute the SQL and fill the group result table */

&MyVersion = GB_EXEC ( « N » ) ;    /* <N> Don't rebuild the group if it is⇒
    available */

/* Employee group is now available for your module */

/* This populates the group result table MyClientModuleResultTable */

/* You can now use this record to populate your scrolls or work on this table... */

/* ADD YOUR CODE HERE */

/* Clear the group result table only in the case you know the group will not⇒
    be used anymore*/

[GB_DELETE() ;]

```

Group Build Query Limitations for Developers

Following are some limitations to the standard use of PeopleTools Query:

- Developer queries need to be defined as PUBLIC queries.
- You can't use unions.
- You can't use aggregates.
- You can't use Tree Option as an expression.
- You must include the view GB_QRY_LINK_VW in the query.
- Records that you add in QUERY must have at least one criterion.
- Prompts can be used as expressions to bind variables.

Implementing PeopleSoft Application Engine API Calls

This section discusses what a developer has to do to use Group Build in the module that he or she is building, using PeopleSoft Application Engine. (We refer to this module as the client module.)

To implement PeopleSoft Application Engine API calls:

1. In PeopleSoft Application Designer, create a Run Control page.
2. Create a new Run Control record or use an existing one.

In this record, add:

- The parameters GB_GROUP_ID, GB_EFFDT, and GB_REFINE_DATE.
- The field VERSIONGBQDM.

3. In PeopleSoft Application Engine, create a new program .

This program must contain:

- A retrieval of parameters.

Step01.SQL:

```
%Select (AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, AE_GBP002_AET.GB_REFINE_DATE) SELECT GB_GROUP_ID , GB_EFFDT , GB_REFINE_DATE
FROM PS_RUN_CNTL_HR WHERE OPRID = %Bind(OPRID) AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

- A call to Group Build PeopleCode API.

Step02.PeopleCode:

```
Declare Function GB_DECLARE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_RESET PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_BIND_DATE PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
Declare Function GB_SET_PANELGROUP PeopleCode DERIVED_HR_GB.GB_API FieldFormula;
GB_SET_PANELGROUP("APPENGINE"); /* This is due to a tools issue and will disappear as soon as the TPRD is closed */
GB_RESET();
&RET = GB_DECLARE(AE_GBP002_AET.GB_GROUP_ID, AE_GBP002_AET.GB_EFFDT, "", "");
&RET = GB_BIND_DATE(AE_GBP002_AET.GB_REFINE_DATE);
AE_GB_API_AET.REFRESH_SW.Value = "N"; /* You can see that the REFRESH_FLAG is set to "N" Equivalent to GB_EXEC("N"). As we can't call a section with direct parameters, we must use the cache record of the AE API to perform this operation */
```

- A call to Group Build AE API GB_EXEC.

Step02.Call Section:

Call the section GB_API.GB_EXEC. You must not call GB_EXEC_LIB.GB_EXEC Directly. You will always use the GB_API AppEngine Lib.

- Version number of the group.

Step01.SQL:

```
UPDATE PS_RUN_CNTL_HR SET VERSIONGBQDM = %Bind(AE_GB_API_AET.VERSIONGBQDM)
WHERE OPRID = %Bind(OPRID) AND RUN_CNTL_ID = %Bind(RUN_CNTL_ID)
```

Note. Perform your own Application Engine processing using this group.

4. Create reports, based on the group that you just created, by setting up a JOB.

When the system launches the SQR, you get the GB_GROUP_ID VERSIONGBQDM (version of the group) from the Run Control record. This enables you to retrieve the group from the Group Results Table and print or perform processing on it.

Differences Between PeopleCode and Application Engine APIs

Question	Answer
What are the differences between a PeopleCode API and a PeopleSoft Application Engine API?	For building a group, there are not many differences between the two APIs. • In both APIs, you use the PeopleCode function GB_DECLARE, GB_BIND, or GB_BIND_DATE. • In the PeopleCode API, you call GB_EXEC("Y") with a REFRESH_FLAG ("Y" or "N") as parameter, and the function returns the VERSION of the group. • In the PeopleSoft Application Engine API, you call a section GB_API.GB_EXEC. The refresh flag is set before this call by updating AE_GB_API_AET.REFRESH_SW, and you retrieve the version of the group in the cache record AE_GB_API_AET.VERSIONGBQDM.
Why can't we use the PeopleCode API directly in a PeopleSoft Application Engine PeopleCode step?	There is a PeopleTools limitation: The CallAppEngine() function is not intended to be inserted into an Application Engine PeopleCode step. If you need to call an Application Engine program from another Application Engine program, you must use the Call Section Action.

Developing Client-Specific Workflow

This section provides the additional steps that must be performed for implementing workflow. This specific workflow is an enhancement to the generic workflow that is provided by default by the Group Build module. Workflow must be fully implemented by the client module developer. This section discusses the main differences between the Group Build workflow and the standard way of implementing workflow.

Although the business process diagram looks like the Group Build generic workflow business process, you have to develop a business process for each client module to enhance the information that is provided by the Group Build generic workflow. The reasons for this are:

- The worklist routing to enhance user information should branch the operator directly to the calling-client module page.
- The business event is triggered from the client module page.

The worklist record table has to contain key fields for accessing the client module page, so map those fields to the appropriate client module page fields (the workflow is triggered from the calling page).

The Message Agent is responsible for entering data on the client module page for triggering the specific workflow. The Database Agent executes a query that retrieves the values that are passed as Message Agent input fields. Therefore, the Database Agent query should retrieve the necessary key values, plus the condition for triggering the workflow.

You have to define a new client-specific table record (MySpecificWorkflowTable). This record stores all client module key fields, the group ID (GB_GROUP_ID) field, and the version (VERSIONGBQDM) field. Populate the MySpecificWorkflowTable after you call Group Build (to get the version number).

Summary

As a client module developer, you have to:

1. Define a new table (MySpecificWorkflowTable) for storing the page key, group ID, and version number fields.
2. Define a new worklist table record.
3. Define a derived/work field that is responsible for triggering the workflow.
4. Add this field to the client module page as a hidden field.
5. Provide PeopleCode for storing page key values before calling Group Build.
6. Define a Database Agent query for retrieving the key field values: group ID, version number, and operator ID.
7. Design the business process (activities, steps, business event, worklist routing, email routing, Database Agent, and Message Agent) and define the necessary attributes and field mappings.
8. Define a new process for the modified Database Agent (MyDBAGProcess) in PeopleSoft Process Scheduler.
9. Define a new job (MySpecificJobName) that serializes PeopleSoft Application Engine, calling the section GB_EXEC in Application Engine GB_API and the modified Database Agent process (MyDBAGProcess).
10. Pass the new job name to Group Build as a parameter through a new API function, GB_SET_JOB_WF(MySpecificJobName), which passes the new job name to be scheduled, enables the specific workflow, and disables the generic workflow. The call to this function must be done before the call to GB_EXEC.
11. Add PeopleCode to save the necessary information in MySpecificWorkflowTable (see the following procedure).

To add PeopleCode to save the information in MySpecificWorkflowTable:

1. Design MySpecificWorkflowTable so that all the key fields that are necessary for accessing your client module page will be recorded.
 - a. Add two key fields, GB_GROUP_ID and VERSIONGBQDM, to your record.
 - b. Add a workflow flag, WF_FLAG.
2. Design MySpecificWorkflowDerived/Work.
 - a. Add two fields: GB_TRIGGER_WF (responsible for triggering the workflow) and OPRID (important for routings).
 - b. Make the fields invisible.
3. Define a worklist record, MyWorklistRecord, for routing to the calling client module page. BUSPROCNAME, ACTIVITYNAME, EVENTNAME, WORKLISTNAME, INSTANCEID, and TRANSACTIONID are standard, required fields for a worklist record.

Add all of your page's key fields, plus the GB_GROUP_ID and VERSIONGBQDM fields.
4. Define the Database Agent (DBAG) query.

The DBAG query is responsible for calling the client module key field values: group ID, group version number, and operator ID.

 - a. In PeopleSoft Tree Manager, add MySpecificWorkflowTable to the HR ACCESS GROUP, as follows:
 - b. Go to PeopleSoft Query.

- c. Join MySpecificWorkflowTable and GB_GENERICWF on group ID and version number to return specific key values: group ID, group version number, workflow triggering flag, and operator ID.
- d. Include in your criteria prompts on group ID and version number.
- e. Save your query as a public database agent query named “_DBAG__MySpecificWorkflowQuery”.
5. Design the MySpecificBusinessProcess.
 - a. In PeopleSoft Application Designer, define a business process.
 MySpecificBusinessProcess has two activities:
 MySpecificWorkflowModule
 MySpecificWorkflowModuleResult
 Each activity has only one step branching to the client module page:
 - b. In the MySpecificWorkflowModule activity, add a business event, a worklist routing, an email routing, a database agent, and links.
 - c. Define each item and its required attributes.
 The business event is triggered from the MySpecificWorkflowDerived/Work record.
 - d. Add workflow PeopleCode, using the pushbutton Edit Business Rules and write the code as displayed, providing the condition for calling the TriggerBusinessEvent function. Write the correct parameters: business process, activity, and business event to trigger.
 - e. On the Worklist Attributes page, select the record defined in step 4 as the worklist record. Specify the Business Process, its activity that works the worklist (MySpecificWorkflowModuleResult).
 - f. On the Field Map page, specify the mapping between the worklist record fields and your client module page keys.
 - g. For the OPRID field, select the role name Roleuser by Oprid Qry, binding the OPRID query variable to the MySpecificWorkflowDerived/Work.OPRID field.
 - h. For the email routing, define the field map between your email fields (SUBJECT, NOTETEXT, TO, CC, and BCC) and your module fields.
 - i. Define the Database Agent items:
 Define the target component on the Message Attributes page and provide the path to your client module component.
 In the Query Name field, enter the database agent query defined in Step 5.
 Define the mapping between the query selection fields (second column) and your client module page fields (last column).
6. Go to PeopleSoft Process Scheduler and define MySpecificWorkflowDBAGProcess
 - a. Add a new process of type Database Agent on the Process Definitions page.
 - b. On the Process Definition Options page, override the parameters list in Append mode, specifying the following as parameters:
 E100 -T -L /A MySpecificWorkflowModule /MD MyDatabaseAgentName
 kbind1=:DERIVED_HR_GB.GB_GROUP_ID2 -kbind2=:DERIVED_HR_GB.VERSIONGBQDM
 /A stands for Activity Name

/MD stands for Message Definition

-kbind1 and -kbind2 are bind variables from the API work page.

7. In PeopleSoft Process Scheduler, define MySpecificWorkflowJob.

Add a new job serializing the Group Build Application Engine process (the one that calls GB_API.GB_EXEC) and MySpecificWorkflowDBAG database agent process.

8. Add calls to Group Build API on your client module.

On the FieldChange PeopleCode event of your Group Build calling pushbutton, use Group Build API as described at Step 7 in the first section of this Guide. Don't forget to call the GB_SET_JOB_WF function to activate your specific workflow and disable the generic workflow.

9. Add PeopleCode to store the necessary information in MySpecificWorkflowTable.

CHAPTER 22

(USF) Setting Up the Work-in-Progress Management System

This chapter provides an overview of the Work-in-Progress (WIP) management system and tells you how to:

- Set up the WIP management system.
- Manage the WIP system.
- Define the WIP activity processes.
- Use the sample data that is delivered with PeopleSoft Human Resources

Understanding the WIP Management System

In PeopleSoft Human Resources, you can track and process personnel data using a work-in-progress (WIP) management system. PeopleSoft Human Resources is delivered with a WIP management system that is already set up for controlling your personnel and recruiting data. The system is ready for configuration. You set up this system only once.

Setting Up the WIP Management System

As part of setting up your WIP system, you perform the following tasks:

- Set up records to define each status type and determine how the system handles it.
- Decide which process works best for your agency and set parameters to automate your Personnel Action Request (PAR) and recruiting processes.
- Define the users who have access to your WIP data.
- Plan a routing and approval process that is synchronous with your agency's requirements.

Before You Begin

Setting up WIP control parameters is usually a one-time-only process that you do when you first configure your PeopleSoft Human Resources system. The setup information in this chapter is for your agency's system administrator who will perform the setup and is not for managers or system users.

All discussions assume that you understand the processes that are being described. A sample WIP setup exists for the Personal Action Request (PAR) and recruiting in the demonstration database that was delivered with your system.

Before you start setting up your WIP system, we recommend that you review the sections cited below under See Also.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “(USF) Administering Personnel Action Requests”

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “(USF) Processing Personnel Action Requests”

Managing Your WIP System

You can configure your WIP controls by setting up records that define the WIP status codes that you want to use. The WIP status code tells PeopleSoft Workflow when and where to send data to the next step of the request/approval cycle or other type of cycle. You associate various status types with each code. The status type tracks the requests.

This section discusses how to set up records for administering and recruiting your workforce. You use two components, WIP Table Records and WIP Activity Records, to set up WIP parameters.

Defining WIP Status Codes and Status Types

When you define WIP status codes, you classify the WIP processes into steps. You use those steps to define routing and tracking in PeopleSoft Workflow.

When reviewers change the WIP Status of a request, the PeopleSoft Workflow process that you link to a status ensures that the action goes through all of your agency’s review levels and keeps it going until it is completed as an actual event.

Designing Your Agency’s WIP Process

First, review the charts for processing PARs as a sample for one of the WIP setups.

Next, analyze your agency’s review process and determine the levels of review that you need for PARs and recruiting processes.

You can design your system based on your agency’s requirements for routing requests and other data through approval processes.

In the section “Overview - Sample System Parameters,” review the charts, which show the sample system’s parameters. You can use these charts as is, change them, or use them as templates to set up your own charts in similar formats.

Defining WIP Status Codes

When you set up your WIP management system, you select and configure the types of status codes that your agency needs. You can use all or some of the statuses that are delivered with the system; you can use some of them more than once in a process. For example, your agency might require two levels of authorization and two levels of approval for processing a PAR. Or, as shown in the sample system, you might want two levels of authorization and one level of approval. The sample system assigns the following status codes:

WIP Status	PAR Status Code
Initiated	INI
Requested	REQ
1st Authorized	1st
2nd Authorized	2nd
Approved	APP
Authorized	AUT
Reviewed	REV
Approved/Signed	SIG
Processed By Human Resources	PRO
Return for More Information	RET
Withdrawn	WTH
Disapproved	DIS
Corrected	COR
Canceled	CAN
IRR Reported (individual retirement record reported)	IRR

Defining WIP Status Types

When you're ready to choose your WIP statuses, you link each WIP status that you've defined to a WIP status type. Status types are:

WIP Status Type	Definition
Work-in-progress	The request hasn't reached the final level of approval.
Canceled	A completed request is canceled by HR.
Corrected	A completed request is corrected by HR.
Completed	A request that has successfully completed all review levels is approved by HR.
IRR Reported	The request will be reported on an IRR.

Linking WIP Status Codes and Status Types

Now that you understand the WIP Status and the Status Type, have analyzed the request process, and have determined the process that your agency will use, you're ready to define your WIP statuses and link each one to a status type.

To link status codes and status types:

1. Define your WIP status codes according to the plan you've set up for your agency.
For example, for a PAR, you might have two first-level authorization reviews, one second-level approval review, and a final human resources (HR) review. You define those review levels in the WIP record tables.
2. Link a *Work-in-progress* status type to each PAR.
When a PAR is traveling along a path of approvals, you link the status type *Work-in-progress* to the PAR until it is completed and approved.
3. Change the status type to *Completed* after the request has passed all reviews and has been approved by HR.
Only when you define a WIP status as *PRO (Processed by HR)* do you link the status type to *Completed*.

Note. After a PAR has been processed, it might need to be corrected or canceled; only HR can correct or cancel a completed PAR. For the WIP status *Corrected* or *Canceled*, link to the status type *Corrected* or *Canceled*.

Note. Only HR can create supplemental or corrected IRRs (individual retirement records). For PARs with the WIP status *IRR Reported*, link to the status type *IRR Reported*.

Setting up WIP Status

This section discusses how to define and link WIP Status.

Pages Used to Define and Link WIP Status

Page Name	Object Name	Navigation	Usage
WIP Record Table 1	GVT_WIP_RECORD1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, WIP Record Table	Define WIP statuses: Describe the type of records you're setting up, describe each status that you want to use, and link each status to a WIP status type.
WIP Record Table 2	GVT_WIP_RECORD2	Set Up HRMS, Product Related, Workforce Data USF, WIP Record Table	Identify the programs and define the data that is needed to support this WIP process.

Defining WIP Statuses

Access the WIP Record Table 1 page.

The screenshot displays the 'WIP Record Table 1' configuration page. At the top, there are tabs for 'WIP Record Table 1' and 'WIP Record Table 2'. Below the tabs, the 'WIP Record:' field is set to 'USFED'. The '*Description:' field contains 'Federal WIP Records', and the '*Short Description:' field contains 'Federal WI'. The 'WIP Status Label:' field is 'PAR Status:'. A checkbox for 'Effective Dated Record?' is checked. The 'WIP Record Details' section includes a 'WIP Status:' field with '1ST', a 'Description:' field with '1st Authorized', and a 'Short Description:' field with '1st Auth'. There is an 'Allow Row Insert?' checkbox. The 'Status Type' section has four radio buttons: 'Work-in-progress' (selected), 'Completed', 'Corrected', and 'IRR Reported'. The 'Personnel Action Processing' section features an 'SF-52 Print Area:' dropdown menu showing 'Part A - Box 6: Authorized By' and an 'Allow SF-50 Print?' checkbox. Navigation controls at the top right of the details section show 'Find | View All | First | 1 of 15 | Last'.

WIP Record Table 1 page

Because the WIP setup is delivered with your system, we describe the page controls that appear on this page as they apply to our sample database. You can change the values to correspond to the setup that you require for your agency.

The WIP record is the record for which you are setting up these parameters. The USFED (US Federal) record that is delivered with this system includes the Employee Data and Recruitment records that refer to Gvt_Pers_Data (government personal data), Gvt_Job, Gvt_Employment, and others as one record. This value shows the records that you specified when you opened the WIP Record Table 1 page.

On this page, describe the type of records you're setting up, describe each WIP status that you want to use, and link each status to a WIP status type.

WIP Status Label	Enter a WIP status label. This label is for referencing the WIP status on various human resources pages. For example, for referencing the WIP status on the Administer Workforce request pages, the label in our sample system is <i>PAR Status</i> (personnel action request status).
Effective Dated Record?	Select if the record is to be effective-dated; for example, <i>USFED</i> (US Federal).

WIP Record Details

WIP Status (work-in-progress status)	Enter the step in the process; for example, <i>1st</i> (first review, first level).

Status Type

Select the status type to be linked to the status that you defined in the Description field.

Work-in-progress	Request hasn't reached the final level of approval.
Corrected	Cancels a completed action.
IRR Reported (individual retirement record reported)	HR Corrects a completed request.
Completed	HR approves a request that has successfully completed all review levels.
Canceled	The request will be reported on an IRR.

For the WIP status codes and status types for which you selected *Allow Row Insert From Status* on some pages in PeopleSoft Human Resources, the system creates a history of the changes that you can see on the pages. For example, on the Administer Workforce request pages, the user can enter a new effective-dated row on the Data Control page.

These types of pages are part of the WIP processing pages and depend on the WIP control configuration to designate the WIP status in which a user can enter a new row. Therefore, you define the WIP status and status types that enable a user to enter a new row for various pages in the system.

Allow Row Insert?	Select if you want users to be allowed to enter a new row in a record with the selected status. When this check box is selected, the first authorization level can authorize existing rows but not new ones.

Personnel Action Processing

In this group box, define whether and where a user can print forms from page with the selected status.

SF-52 Print Area	Select the area on the form where the name is to appear; for example, <i>Part A - Box 6: Authorized By</i> .
Allow SF-50 Print?	Select if you want the SF-50 form to be printed for this status.

To continue entering and reviewing data on this page, place your cursor in the scroll bars on the right side of a data group and click to scroll through the entries.

Identifying the Programs and Defining the Data

Access the WIP Record Table - WIP Record Table 2 page.

WIP Record Table 1 | **WIP Record Table 2**

WIP Record: USFED

WIP Record Program Information Find | View All First 1-4 of 7 Last

*Program:	FGHR002B	*Status Type:	Completed	+ -
*WIP Status:	PRO		Processed by Human Resources	
*Program:	FGHR002B	*Status Type:	WIP	+ -
*WIP Status:	SIG		Approved / Signed	
*Program:	FGHR004B	*Status Type:	Completed	+ -
*WIP Status:	PRO		Processed by Human Resources	
*Program:	FGHR004B	*Status Type:	WIP	+ -
*WIP Status:	SIG		Approved / Signed	

WIP Record Table 2 page

The Program is the name of the Structured Query Report (SQR) file, COBOL, or database agent process that inserts a new row based on the status type. The row that the system inserts is the highest effective-dated row with the status type that is specified in the *Status Type* field.

For example, in the exhibit above, based on a status type of *Completed* for the program *FGHR002B*, the system inserts a new row and displays *PRO* (*Processed by Human Resources*) in the WIP Status field. Therefore, the WIP Status field designates the WIP status for the new row, and the Status Type field designates the status type from which to insert.

Program

Enter the name of the program's SQR file, COBOL, or database agent process that inserts a new row.

When setting up your system, you can add programs by placing your cursor in the Program field and clicking the Insert Row button on the toolbar.

Status Type

Options are as follows:

- *Completed*: The system searches for both *Completed* and *Corrected*.
- *WIP*: The system searches for *WIP*, *Completed*, and *Corrected*.

When setting up your system, you can change these status type options.

To continue entering and reviewing data on this page, place your cursor in the scroll bars on the right side of a data group and click to scroll through the entries.

Defining WIP Activity Processes

This section discusses how to define WIP activity processes.

Pages Used to Define WIP Activity Processes

Page Name	Object Name	Navigation	Usage
WIP Activity1	GVT_WIP_ACTVTY1	Set Up HRMS, Product Related, Workforce Data USF, WIP Activity Table	Link each WIP activity to the component in which the action will be processed, specify if data rows can be inserted or deleted by each activity, and set up default values.
WIP Activity Table - Component Defaults	GVT_WIP_PGRP_SEC	Click the Component Defaults button on the WIP Activity Table - WIP Activity 1 page.	Set default values for the selected component.
WIP Activity 2	GVT_WIP_ACTVTY2	Set Up HRMS, Product Related, Workforce Data USF, WIP Activity Table	Select the action for each component for each activity.
WIP Activity 3	GVT_WIP_ACTVTY3	Set Up HRMS, Product Related, Workforce Data USF, WIP Activity Table	Make the WIP status available for input for the selected components.

Linking WIP Activities to Components

Access the WIP Activity Table - WIP Activity1 page.

WIP Activity1 | WIP Activity2 | WIP Activity3

WIP Record: USFED Federal WIP Records

WIP Activity Information Find | View All First 1 of 1 Last

WIP Activity: 2ND AUTH **WIP Status:** 2ND 2nd Auth + -

***Description:** 2nd Authorization ☐ **Allow Row Insert?** ☐ **Allow Row Delete?**

***Short Description:** 2nd Auth **Insert Status:** COM/COR

WIP Status in Search Find | View All First 1-2 of 2 Last

1ST	1st Authorized	+ -
2ND	2nd Authorized	+ -

Components Performing Action Find | View All First 1 of 1 Last

EE_2ND_AUTH ☐ **Self Service** ☒ **All Job Actions Valid?** Component Defaults + -

WIP Activity1 page

WIP Activity Information

WIP Activity	Enter the activity for which you are defining controls.
WIP Status	Select the WIP status for this WIP record.
Allow Row Insert?	For effective-dated records only. Select to permit users to insert rows using this WIP activity.
Allow Row Delete?	For effective-dated records only. Select to permit users to delete rows using this WIP activity.
Insert Status	Defines the WIP status codes that appear when you insert a new row or when you are in Add mode. For example, when you enter a WIP status of <i>Hire</i> , you aren't inserting a row, but when you request a change in benefits, you <i>are</i> inserting a row.

WIP Status in Search

Select the WIP status codes to include in search records. The search record for the components that are linked to this activity retrieves only employees with rows that contain a WIP status that matches what is in this table.

Components Performing Action

Select the components that the WIP activity uses to perform the actions. An activity (for example, a request) can have more than one component associated with it. For example, the components for Employee Request (EE_EMPL_REQ) and Supervisor Request (EE_SUP_REQ) are request-like activities and can be included under the Request activity.

- Self Service

Select if the component is a self-service component. When this check box is selected, the component automatically inserts a row when it is initialized. This is like adding a new row.
- All Job Actions Valid?

Select if all job actions are valid for this component.
- Component Defaults

Click this button to enter component defaults.

Setting Default Values for Components

Access the WIP Activity Table - Component Defaults page.

Component Defaults

Action:

Reason Code:

Nature of Action

Code:

Legal Authority (1):

Legal Authority (2):

WIP Activity Table - Component Defaults page

- Action

Select the default value for this component. When the component is used, this value populates the Action fields on the PAR (personnel action request) pages. You cannot change this value from the PAR pages.
- Reason Code

Select the default value for this component when it performs this WIP Activity.
- Nature of Action Code

Select the default value for this component when it performs this WIP Activity.
- Legal Authority (1)

Select the default value for this component when it performs this WIP Activity.
- Legal Authority (2)

Select the default value for this component when it performs this WIP Activity.

Selecting Actions for Components

Access the WIP Activity Table - WIP Activity 2 page.

WIP Activity1 | **WIP Activity2** | WIP Activity3

WIP Record: USFED Federal WIP Records

WIP Activity Information Find | View All First 1 of 1 Last

WIP Activity: 2ND AUTH 2nd Authorization + -

Components Performing Action Find | View All First 1 of 1 Last

Component Name: EE_2ND_AUTH + -

Available WIP Status to Change Find | View All First 1 of 3 Last

2ND 2nd Authorized + -

Bus Proc: Administer PARs

Activity: 2nd Authorization

Event Name: Route for Approval/Signature

Prompt for Route to Next? ☒ Using: GVT_POI_RT_VW

Routing Text: POI Signature Authority

WIP Status in PAR Tracking Find | View All First 1 of 1 Last

Default Sequence: + -

*WIP Status: ☐ Required ☒ Preload

WIP Activity2 page

Components Performing Action

Component Name Displays the name of the component that you selected on the WIP Activity 1 page.

See [Chapter 22, “\(USF\) Setting Up the Work-in-Progress Management System,” Linking WIP Activities to Components](#), page 426.

Available WIP Status to Change

The statuses that you specify in this group box determine what the users see when they click the prompt button for the WIP Status field on the PAR (personnel action request) pages. The user sees only the statuses that you have designated on this page.

Component Name Displays the names of the components that you entered on the WIP Activity 1 page.

See [Chapter 22, “\(USF\) Setting Up the Work-in-Progress Management System,” Linking WIP Activities to Components](#), page 426.

Bus Proc (business process), Activity, Event Name The Bus Proc, Activity, and Event Name fields are signals for PeopleSoft Workflow. These entries govern the routing of the action through the various PeopleSoft Human Resources business processes.

To modify the routings, you create a new business process activity and event in PeopleSoft Application Designer. On this page, you insert the name of the new process and define its routing. The system retrieves the name of

the process from this table and triggers that event when the user saves the activity with the WIP status that you have designated.

Prompt for Route to Next? Select to specify the routing prompt list views that are to be used on the prompt page.

When this check box is selected, you can enter the parameters for the routing process in the two new fields that appear: Using and Routing Text.

When this check box is selected, a new page appears when the user clicks Save. On the new page, the user selects from the list of employees who are in the result set of this view. The user routes the request to the selected employee for the next level of approval.

In Routing Text, the user specifies the next routing of this action.

WIP Status in PAR Tracking

Default Sequence Select the default sequence of a WIP status in PAR (personnel action request) tracking.

WIP Status Select the WIP status for the sequence you are defining.

Required Select if the sequence is required.

Preload Select if the sequence is Preload.

Making WIP Statuses Available to Components

Access the Activity Table - WIP Activity 3 page.

WIP Activity1WIP Activity2WIP Activity3

WIP Record:USFEDFederal WIP Records

WIP Activity InformationFind | View AllFirst1 of 1Last

WIP Activity:2ND AUTH2nd Authorization

Components Performing ActionFind | View AllFirst1 of 1Last

Component Name:EE_2ND_AUTH

WIP Status to UngrayFind | View AllFirst1 of 2Last

*WIP Status:1ST1st Auth☒ Status Field Only?

WIP Activity3 page

Action Reason

Action	Enter the action for the identified component that appears in the Component Name field. The Action and Reason Code values control what values are available from the Action/Action Reason prompts. You see these values only when you are administering the PAR (personnel action request) using the component and activity.
Reason Code	Enter the reason code for the component that appears in the Component Name field. The Action and Reason Code values control what values are available from the Action/Action Reason prompts. You see these values when you are administering the PAR using the component and activity.

WIP Status to Ungray

WIP Status	Select the WIP status that is to be available for input.
Status Field Only?	Select if this is a status field only.

Overviews - Sample System Parameters

Following are overviews of the sample system's Administer Workforce PAR, WIP parameters and WIP status code parameters.

Administer Workforce PAR and WIP System Parameters

The tables that follow contain the sample system's Administer Workforce PAR and WIP parameters. Our sample system assigns and uses the following WIP status codes, PAR status codes, and the users who access them.

WIP Status	PAR Status Code	Who Can Assign This Status
Initiated	INI	Employee, Supervisor, Human Resources
Requested	REQ	Employee, Supervisor, Human Resources
1st Authorized	1st	1st Level Reviewer: Supervisor or Manager
2nd Authorized	2nd	1st Level Reviewer: Supervisor or Manager
Approved/Signed	SIG	2nd Level Reviewer: Supervisor or Manager

WIP Status	PAR Status Code	Who Can Assign This Status
Approved	APP	Human Resources
Authorized	AUT	1st Level Reviewer: Supervisor or Manager
Reviewed	REV	2nd Level Reviewer: Supervisor or Manager
Processed by Human Resources	PRO	Human Resources
Return for More Information	RET	Supervisor, Manager, Human Resources
Withdrawn	WTH	Employee or Supervisor requesting the action
Disapproved	DIS	Supervisor, Manager, Human Resources
Corrected	COR	Human Resources
Canceled	CAN	Human Resources
IRR Reported (individual retirement record reported)	IRR	Human Resources

Sample System - WIP Status Code Parameters

The WIP status types are linked to the various WIP status codes in the sample system, as follows:

Status Type	WIP Status Code
Work-in-progress	Initiated
Work-in-progress	Requested
Work-in-progress	1st Auth (first authorization)
Work-in-progress	2nd Auth (second authorization)

Status Type	WIP Status Code
Work-in-progress	APP (approved)
Work-in-progress	AUT (authorized)
Work-in-progress	REV (reviewed)
Work-in-progress	Approved/Signed
Work-in-progress	Returned (returned for more information)
Work-in-progress	Withdrawn
Work-in-progress	Dis (disapproved)
Corrected	Cor (corrected)
Canceled	Can (canceled)
Completed	PRO (processed by HR)
IRR Reported (individual retirement record reported)	IRR (IRR reported)

Sample System - WIP Parameters Setup

The WIP parameters are set up in the sample system as follows:

WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Ungray
1st AUTH	1st AUTH		1st	EE_1ST_AUTH	1st, Request	1st, Request - Both Status Field Only
2nd AUTH	2nd AUTH		2ND	EE_2nd_AUTH	1st, 2nd	1st, 2nd - Both Status Field Only
APP/SGN	APP/SGN			EE_APPROVAL	2nd, SIG	2nd - Status Field Only; SIG
APPL HIRE	APPL HIRE		PRO	EE_APPLICANT_HIRE	PRO	PRO, INI
APPROVE	APPROVE			GVT_VACANCY_APPR	APP, REV	REV
AUTHORIZE	AUTHORIZE			GVT_VACANCY_AUTH	AUT, REQ	REQ
CANCEL	CANCEL			EE_CANCELLATION	CAN, PRO	COR, PRO - Both Status Field Only
CONC_HR	CONC_HR		PRO	EE_CONC_HIRE		PRO, INI
CORRECTION	CORRECTION	Insert, Delete	COR	EE_CORRECTION	COR, PRO	COR, PRO

WIP Activity	Description	Allow Row Delete/ Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Ungray
EMPL REQST	EMPL REQST	Insert	REQ	EE_EMPL_REQ	1ST, 2ND, COR, DIS, PRO, INI, REQ, RET, SIG	INI, REQ
HIRE	HIRE		PRO	EE_HIRE		PRO, INI, REQ
HR PROC	HR PROC	Insert, Delete	PRO	EE_HR_PROC	1ST, 2ND, CAN, COR, DIS, PRO, REQ, RET, SIG, WTH	1ST, 2ND, CAN, COR, DIS, PRO, INI, REQ, RET, SIG, WTH
IRR CORR	IRR CORR	Insert	PRO	EE_IRR_CORR	IRR	PRO
IRR SUPP	IRR SUPP	Insert	PRO	EE_IRR_SUPP	IRR	PRO
LEAVE REQ	LEAVE REQ		REQ	FG_EE_LEAVE_REQ		REQ
PROCESS	PROCESS		PRO	GVT_VACANCY_ PROC	APP, AUT, PRO, REQ, REV	APP, AUT, PRO, REQ, REV
REQUEST	REQUEST		REQ	GVT_VACANCY_ RQST	INI, REQ	INI, REQ
REVIEW	REVIEW			GVT_VACANCY_ RVWD	AUT, REV	AUT

WIP Activity	Description	Allow Row Delete/Insert	Default WIP Status	Component Performing Action	WIP Status in Search	WIP Status Field to Ungray
SUP REQST	SUP REQST	Insert	REQ	EE_SUP_REQ	PRO, INI, REQ	INI, REQ
TERMINATN	TERMINATN	Insert	REQ	FG_EE_TERMINATION		REQ
W3_PERS_DT	W3_PERS_DT		PRO	W3_GVT_PERS_DATA	PRO	PRO, REQ

CHAPTER 23

Setting Up PeopleSoft HelpDesk for HR – 360° View

PeopleSoft HelpDesk for HR – 360° View provides a complete view of an employee's HRMS data. This PeopleSoft CRM application is set up and operated from CRM but extracts and displays data stored in PeopleSoft HRMS.

As part of the PeopleSoft HelpDesk for HR setup, you must:

- Set up HRMS security giving HelpDesk agents access to the data of the employees they will be serving.
- Set up the direct report structure for the managers in your organization.

See Also

PeopleSoft Enterprise Components PeopleBook: PeopleSoft HelpDesk

Understanding PeopleSoft HelpDesk for HR

PeopleSoft HelpDesk for HR extracts and displays the following information from PeopleSoft HRMS:

- Personal.
- Job.
- Position summary.
- Payroll summary.
- Benefits summary.
- Dependent and benefits.
- Direct reports.

You cannot modify the information from the HelpDesk pages.

Setting Up Security for PeopleSoft HelpDesk for HR

Security for PeopleSoft HelpDesk for HR works the same way as it does for all of HRMS. HelpDesk agents are granted access to a department (or departments) and all the employees or departments that fall under it.

The HelpDesk agents using PeopleSoft HelpDesk for HR must have access to employee data in order to view it on the 360 Degree View page.

See Also

Chapter 9, “Administering PeopleSoft Security,” page 87

Setting Up Direct Reports for PeopleSoft HelpDesk for HR

PeopleSoft HelpDesk for HR can only retrieve the appropriate reporting structure for an employee if you have set up the access type on the Direct Reports Setup page.

To set up the access type:

1. Access the Direct Reports Setup component (Set Up HRMS, Common Definitions, Self Service, Direct Reports Setup) and select the component HD_360_COMPONENT.
2. On the Target Information page choose the Access Type *By Supervisor Id*.
3. Save the page.

CHAPTER 24

Building Organization Charts

PeopleSoft Human Resources enables you to produce detailed organization charts with PeopleSoft Human Resources data and the Visio Organization Charting Wizard. Building organization charts is easy—all you do is choose to map your organization based on positions or on departments, using one of your PeopleSoft Human Resources Position or Department trees; and run the Organization Chart SQR from PeopleSoft Process Scheduler. Visio does the rest. Once you select formatting options using the Visio Organization Charting Wizard, creating detailed charts of only one department or your entire organization is as simple as pressing a button.

This section discusses how to:

- Create organization charts.
- Review organization charts.
- Use the Visio Organization Charting Wizard.
- Build an organization chart from PeopleSoft Tree Manager.

Before You Begin

Before you can create organization charts, you must:

- Make sure that Visio is installed on your client.

Visio is not delivered with PeopleSoft Human Resources; you must purchase and install Visio on the client computers separately. For more information about installing Visio, see your Visio documentation.

- Make sure that organization and employee data exists in PeopleSoft Human Resources before you start working with the Organization Charting Interface pages.

Creating Organization Charts

To create organization charts that are based on your human resources data:

- Run the Organization Chart SQR from the Organization Chart page.
- Copy the resulting file to the client.
- Review the organization chart information gathered by the Organization Chart SQR.
- Start Visio and run the Vision Chart Wizard.

Page Used to Create an Organization Chart

Page Name	Object Name	Navigation	Usage
Organization Chart	ORGCHART_PNL	Organizational Development, Position Management, Create Organization Structure, Build Organization Chart	Create an organization chart based on PeopleSoft Human Resources system trees.

Creating an Organization Chart

Access the Organization Chart page.

Organization Chart

Run Control ID: GN2

Report Manager

Process Monitor

Run

Department or Tree Information

*Report Type:

Tree

SetID:

Tree Name:

Tree Node:

Tree Level:

Levels:

3

Organization Chart page

First, set up organization and employee data in PeopleSoft Human Resources, and then set up your Organization Charting Interface on the Third-Party/System page in the Installation component.

To build your chart using one of the PeopleSoft Human Resources system trees, you provide the system with department and/or tree information.

- Report Type

Select a report type. Options are:

 - Department*

Builds your chart based on a single department that you select.
 - Tree*

Builds your tree based on one of your Human Resources system trees. Using this option, you can include multiple departments in your chart.

Note. You can build your organization chart from active department and position trees only. You must also have security access to the trees and departments that you want to include in your organization chart.

Building Your Chart Using Departments

If you select Department in the Report Type field, then the SetID and *Department* fields appear.

Department	Enter the department that you want to include in your organization chart from the list of department IDs in the setID. You build your organization chart one department at a time. (You create the department codes when you define departments in the Department Table.)
Run	Click Run if you're building your chart using the Department report type. PeopleSoft Process Scheduler runs the Organization Chart SQR.

Building Your Chart Using Trees

If you selected a report type of *Tree*, the SetID, Tree Name, Tree Node, and #Levels (number of levels) fields appear:

1. Select a setID from the list of values.
2. Select a tree name from the list of trees.

Selecting Tree Nodes and Levels to Include in Your Chart

The Tree Node and #Levels fields tell the system where to start the organization chart at the Tree Node level and the next x number of levels to include in the chart. For example, if you begin the chart at tree level 5 and you leave #Levels at 3, the organization chart includes levels 5 through 7 of your tree.

The system displays the tree level that you selected. For example, if you selected Department 10100, the Office of the President, from the Department Security tree, the system indicates that you are using tree level 5. Click the Run button to have PeopleSoft Process Scheduler run the Organization Chart SQR.

See Also

[Chapter 9, “Administering PeopleSoft Security,” Creating and Modifying Security Trees , page 94](#)

Copying the Organization Chart File to the Client

The Organization Chart SQR creates the ORGCHART.TXT file and stores it in the application server. To create an organization chart using Visio, you need to copy the ORGCHART.TXT file to a client computer. You will run Visio and create the organization chart on the client.

To copy the ORGCHART.TXT file:

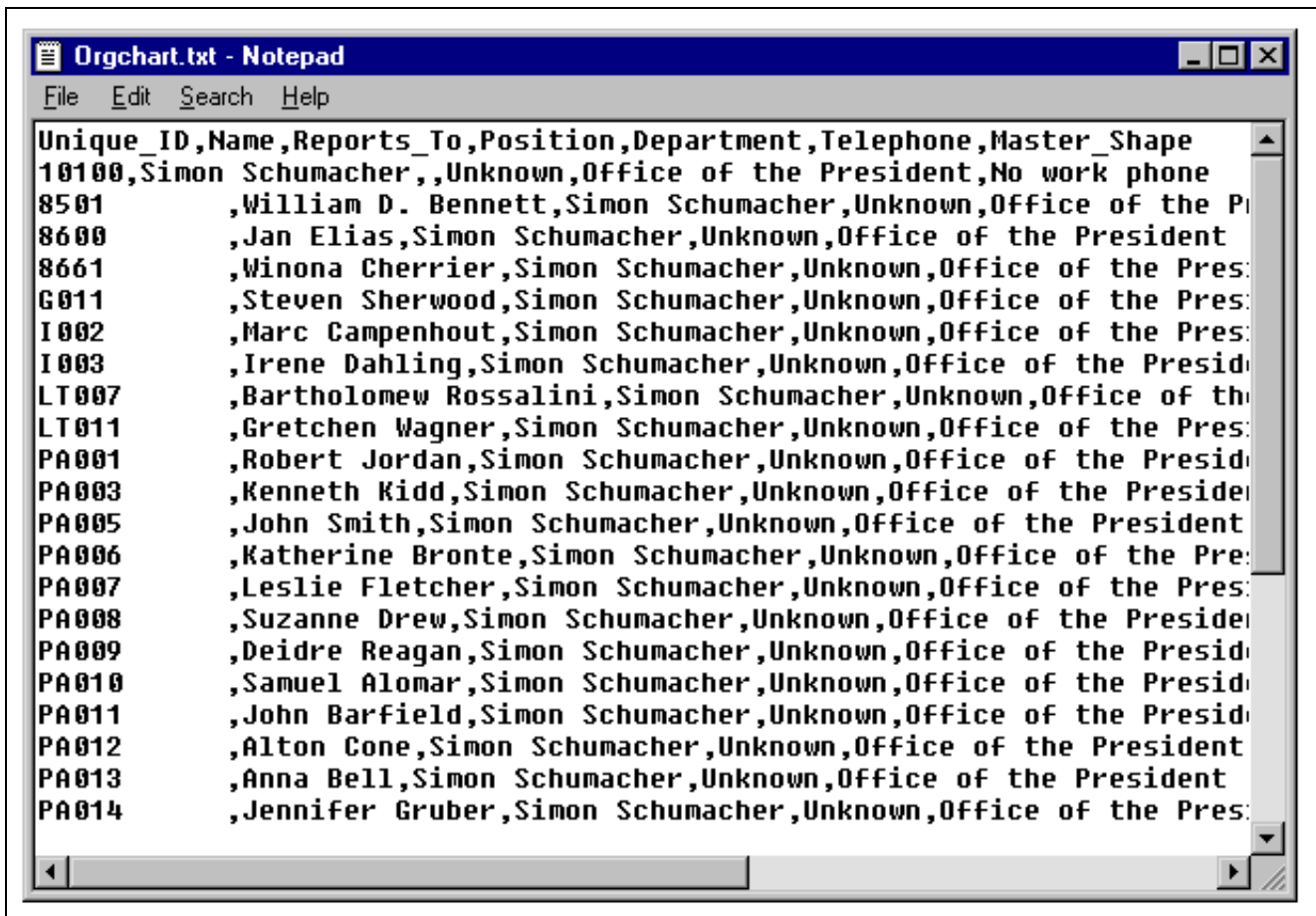
1. Access the Process Monitor – Process List page (PeopleTools, Process Scheduler, Process Monitor).
2. Locate the organization chart process and click on the associated Details link.
3. Click the View Log/Trace link.
4. Click the ORGCHART.TXT link to open the file.
5. Select File, Save As and save to the client.

Reviewing Your Organization Chart

To review the results of your Organization Chart SQR process in the ORGCHART.TXT file, use a text editor to open and review the file. The file contains the following data:

- Unique ID.
- Name.
- Reports To.
- Position.
- Department.
- Telephone.

Following is an example of the ORCHART.TXT file:



```

Unique_ID,Name,Reports_To,Position,Department,Telephone,Master_Shape
10100,Simon Schumacher,,Unknown,Office of the President,No work phone
8501,William D. Bennett,Simon Schumacher,Unknown,Office of the President
8600,Jan Elias,Simon Schumacher,Unknown,Office of the President
8661,Winona Cherrier,Simon Schumacher,Unknown,Office of the President
G011,Steven Sherwood,Simon Schumacher,Unknown,Office of the President
I002,Marc Campenhout,Simon Schumacher,Unknown,Office of the President
I003,Irene Dahling,Simon Schumacher,Unknown,Office of the President
LT007,Bartholomew Rossalini,Simon Schumacher,Unknown,Office of the President
LT011,Gretchen Wagner,Simon Schumacher,Unknown,Office of the President
PA001,Robert Jordan,Simon Schumacher,Unknown,Office of the President
PA003,Kenneth Kidd,Simon Schumacher,Unknown,Office of the President
PA005,John Smith,Simon Schumacher,Unknown,Office of the President
PA006,Katherine Bronte,Simon Schumacher,Unknown,Office of the President
PA007,Leslie Fletcher,Simon Schumacher,Unknown,Office of the President
PA008,Suzanne Drew,Simon Schumacher,Unknown,Office of the President
PA009,Deidre Reagan,Simon Schumacher,Unknown,Office of the President
PA010,Samuel Alomar,Simon Schumacher,Unknown,Office of the President
PA011,John Barfield,Simon Schumacher,Unknown,Office of the President
PA012,Alton Cone,Simon Schumacher,Unknown,Office of the President
PA013,Anna Bell,Simon Schumacher,Unknown,Office of the President
PA014,Jennifer Gruber,Simon Schumacher,Unknown,Office of the President
  
```

Example of ORGCHART.TXT file

Using the Visio Organization Chart Wizard

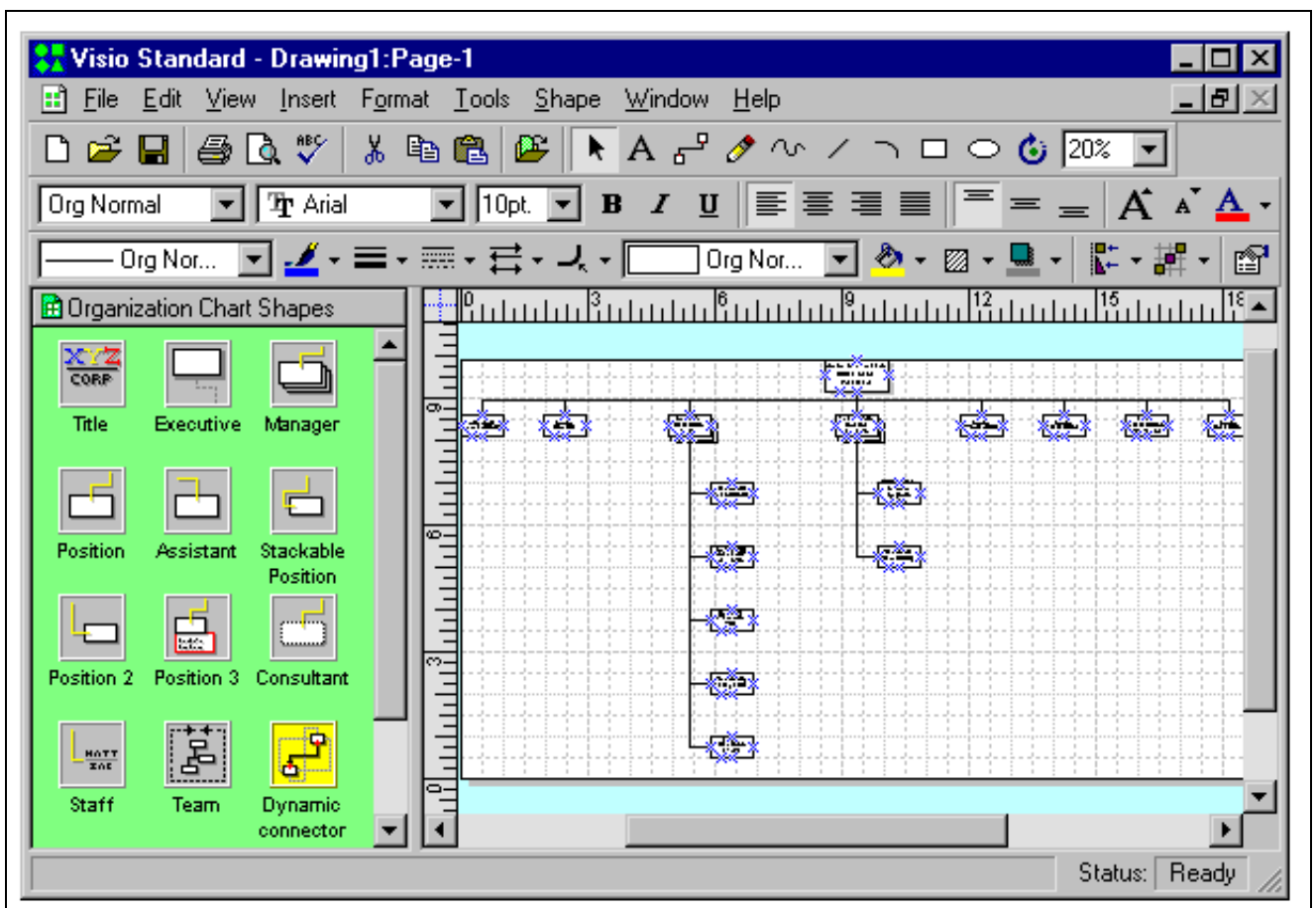
Open Visio and use the Organization Chart Wizard to create your organization chart automatically.

Note. These instructions are for Visio 2000. The Organization Chart Wizard may operate slightly differently for Visio 2002.

To run the Organization Chart Wizard:

1. In Visio, select File, New, Organization Chart, Organization Chart Wizard.
2. In the window that appears, select the option *Information that's already stored in a file or database* and click Next.
3. On the next window select the option *A text, Org Plus (*.txt), or Microsoft Excel file* and click Next.
4. On the next window enter the location on the client that contains your organization information (where you saved the ORGCHART.TXT file), for example *C:\TEMP\ORGCHART.TXT* and click Next.
5. Select *Name* for the Name field, *Reports_To* for the Reports to field, and *<none>* for the First Name (optional) field and click Next.
6. Select the data that you want displayed in the chart shapes (for example *Name* for the First Line and *Position* for the Second line) and click Next.
7. Add other fields contained in the ORGCHART.TXT file to the Org Chart by selecting them from the Data file columns and adding them to the Custom Property fields column. Click Next.
8. Select *I want the wizard to automatically break my organization chart across pages* and click Finish.

Following is an example of the Visio page that you see when your organization chart is complete:



Example of a department organization chart in Visio

Note. For more information about editing and printing your organization chart in Visio, see your Visio documentation.

CHAPTER 25

Updating Employee Data Using Mass Update Processes

This chapter provides an overview of mass update processing and discusses how to process mass updates.

Note. PeopleSoft no longer supports HRMS specific Mass Change templates. We have left the templates in the database for your convenience but recommend that you use the Mass Update feature.

See Also

PeopleTools: Data Management, Mass Change

Understanding Mass Update Processing

Mass update processing enables you to make changes to the data of large groups of employees. Update employee data by groups (using the groups you create using PeopleSoft Group Build), position number, job code, establishment, or department.

This section discusses:

- Mass update steps.
- Mass Update process (HR_MASSUPD).
- Tips for a successful mass update.

Mass Update Steps

To run a mass update:

1. Set up templates keyed to Mass Update IDs on the Mass Update Definition page.
These templates identify the parameters of the updates and enable you to save and reuse parameters.
2. Enter the Mass Update IDs that you want to execute on the Mass Update page and run the Mass Update process (HR_MASSUPD).
Choose to execute just one or a number of IDs.
3. Review the execution result record on the Mass Update Result page.
Use the result record to determine the source of any errors, correct the problems, and then run the process again for just the affected employees.

Mass Update Process (HR_MASSUPD)

The Mass Update process (HR_MASSUPD) uses the business component related to the data slated for update (that is, for job data, use the JOB_DATA business component) and retrieves the data for each employee in the group. It then assigns the new values for the employees and saves the change, triggering any business rules that apply to this business component. It also creates an execution result record to trace the statuses of all modifications for all employees.

Tips for a Successful Mass Update

For a successful mass update:

- Test your update on a small group first.
- Use the correction option only if you are certain you want to override data.

If at all possible, add a new effective dated row, instead.

- Familiarize yourself with the online transaction to understand the rules governing the component before trying to automate it using the Mass Update process. When you update a component using Mass Update, it is governed by the same rules (such as defaulting and required fields) as when you access the component online.
- To enhance performance, group change lines (using sequence numbers) by record when possible. By keeping all changes for a record together, the system opens the component only once. When changes to a record are interspersed with other record changes, the system must keep moving between records.
- Create several simple Mass Update IDs that you can use in combination instead of trying to create a complicated one that changes everything.

In addition to being more flexible, it's easier to identify the source of errors.

Processing Mass Updates

This section discusses how to:

- Set up mass update definitions.
- Run mass updates.
- View Mass Update process results.

Pages Used to Process Mass Updates

Page Name	Object Name	Navigation	Usage
Mass Update Definition	MU_MASS_UPDATE_TBL	Workforce Administration, Collective Processes, Mass Changes, Mass Update Setup	Set up mass update definitions to process mass updates.
Mass Update	RUNCTL_MASSUPD1	Workforce Administration, Collective Processes, Mass Changes, Mass Update Run Control Page	Run mass updates using Mass Update IDs.
Mass Update Result	MU_EXEC_RESULT	Workforce Administration, Collective Processes, Mass Changes, Mass Update Result	View Mass Update process results.
Mass Update message log	MU_EXEC_MSGLOG_SEC	Click Details on the Mass Update Result page.	View any errors that occurred during the Mass Update process.

Setting Up Mass Update Definitions

Access the Mass Update Definition page.

Mass Update Definition

Mass Update ID: K0MU3

***Description:** Change JobCode

Short Description: JobCode

Population Selection Options

***Select By:** Job Code

Business Unit: GBIBU

Job Code: 600140

Process Mode Options

☒ Add new effective date
 ☐ Correction on current Info.

Reference Date: 01/01/2001

Employee Data Change

*SeqNum	*Record (Table) Name	*Field Name	Field Value	Update Future		
1	JOB	BUSINESS_UNIT	GBIBU	☐	+	-
2	JOB	JOB CODE	140040	☐	+	-

Compensation Data Change

*Action	*SeqNum	*Rate Code	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group		
Add	1								+	-

Mass Update Definition page (1 of 2)

Compensation Data Change

Customize | Find |  First 1 of 1 Last

Amounts

Changes

*Action	*SeqNum	*Rate Code	Change Amount	Change Points	Change Percent	Apply FTE		
Add	1					☐		

Mass Update Definition page (2 of 2)

Population Selection Options

Select By

Indicate how you want the system to select employees for mass update: *Group ID, Position Number, Job Code, Establishment, or Department.* When you make a selection here, the system displays related fields below for you to specify which *Group ID, Position Number, Job Code, Establishment, or Department* you want the process to update. For example, if you selected *Group ID*, the system displays the Group ID field. The update process will select all employees with the group ID you specify.

Note. To set up mass update definitions by group, you must grant group security to the Mass Update Definition page. To set up a mass update definition by department, the user must have access to the selected department.

Process Mode Options

Indicate whether you want the process to correct the current information or add a new effective dated row.

Add new effective date and Reference Date

Select to insert a new effective dated row using the reference date as the new effective date. If a record already exists with this effective date, the system inserts a row with the date and a sequence number. If the record is not organized by effective sequence, the system produces an error message warning you that if the update were to go ahead, it would overwrite data. This option inserts new information and does not override previous data.

Correction on current Info and Reference Date

Select to change incorrect data and override information in the employee’s records. The system corrects the record that is or was effective as of the reference date you enter.

Employee Data Change

Use these fields to define which fields to update and with what values.

SeqNum (sequence number)

Indicate in what order the system should update the fields. Some fields cannot be updated without specifying several other related fields in the same mass update ID. For example, to specify a Location field on the JOB record, you must first specify the appropriate business unit. The Business Unit field should be processed first and should have an earlier sequence number than the Location field.

Fields that are managed with a key, such as phone information, also require that you use a sequence number to ensure that the key is updated first. For example, before the mass update can update a phone number, it needs to

update the phone type. When setting up the mass update, ensure that phone type is an earlier sequence number than the phone number.

The system warns you if you need to add a related or key field.

Note. Be careful to sequence fields appropriately. Remember that the same constraints (such as defaulting and required fields) that govern a component when you access it online are also active when you update them with Mass Update. The Mass Update process does a preliminary check during the saving process, but it cannot prevent all errors.

Record (Table) Name	Select the record containing the field that you want to update.
Field Name	Select the field whose value you want to update.
Field Value	Enter the value you want to enter in the field you selected.
Update Future	Select to have the Mass Update process update all existing future effective dated rows (rows that have an effective date later than the Reference Date) in addition to the effective dated row it is adding or correcting. This option is not applicable to non-effective dated data.

Specifying Job Actions and Action Reasons in Compensation Data Change

Enter a row for action and action reason field so that you can enter values to for the changes you make with the Mass Update process. It's important that you include an action and action reason value when making changes to employee job data. If you do not specify an action and action reason for inserting a new effective dated row in an employee's Job or Personal Data record, the Mass Update process inserts the following values in the new record:

Change Type	Action	Action Reason
Employee Data Change	Data Change (DTA)	None
Compensation Data Change	Pay Rate Change (PAY)	Other (OTH)

Compensation Data Change: Amounts Tab

See the above exhibit for an example of this tab.

Use this tab to correct or add compensation amounts.

Action	Select to <i>Add</i> , <i>Change</i> , or <i>Delete</i> compensation data. <i>Add</i>: When you select this option and the rate code already exists in the employee compensation package, the system adds the compensation element to the existing package with a new compensation sequence number. <i>Change</i>: When you select this option, the system can process changes to employees with only one compensation element or employees who have previous compensation rows with the same rate code.

- *Delete:* If you select this option, the system removes all compensation elements with the rate code specified here from the employee compensation package.

The Mass Update process can only change or delete compensation packages that contain rate code information.

SeqNum (sequence number)

The system orders the rows in the grid using this number in ascendant order.

Rate Code

Select the rate code whose associated data you want to add, change, or delete. When you add compensation data, the system inserts the compensation rate code for any new compensation effective sequences.

Compensation Data Change: Changes Tab

Use this tab to add compensation changes. The fields on this tab match those of the Amounts tab.

See Also

Chapter 9, “Administering PeopleSoft Security,” page 87

PeopleSoft Human Resources PeopleBook: Administer Compensation

Running Mass Updates

Access the Mass Update page.

Mass Update

Run Control ID: GN2

[Report Manager](#) [Process Monitor](#)

Run

Mass Update Steps

Customize | Find | 

First  1 of 1  Last

*Step Number	*Mass Update ID		Exec?	Done?		
1			☐	☐	+	-

Mass Update page

Step Number

Enter the order in which to process this step.

Mass Update ID

Select the mass update ID you want to process.

Exec? (execute?)

Select to execute mass updates step by step instead of executing all the mass updates in an ID at once. This enables you to ensure that the each step executes properly before proceeding to the next. Select to execute your first step or to execute a row after the previous row has completed.

Done?

The system selects this check box when it has processed the mass update ID in the step. If the process completes, the system displays a link to the Mass Update Result page where you can review the results of the update.

Run

Click to run the Mass Update process.

Viewing Mass Update Process Results

Access the Mass Update Result page.

Mass Update Result

Run Control ID: GN3

Step Number: 1

Mass Update ID: KOMU1

Last Update Date/Time:

Last Update User ID:

Execution Results

[Customize](#) | [Find](#) | First 1 of 1 Last

EmplID	Empl Rcd#	*Status	
1	0	Ready	

Mass Update Result page

Status

Displays the status of the mass update change to this employee's record.

If the status is *Failure*, the process was unable to make the change. You can correct the problem and come back to this page to reset the status to *Ready*, or you can opt to *Cancel* the process for this employee.

When you select *Ready*, you can rerun the process.

Details

Select to view the message log for this employee. The message log displays the errors (if any) that occurred during the mass update process.

CHAPTER 26

Using PeopleSoft Workflow

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

- Use Workflow in your HRMS business processes.
- Set up Workflow roles and role users.
- Set up routine data.
- Activate Workflow.
- Set up Workflow approval functionality.
- Use the business processes in PeopleSoft Human Resources.

Understanding PeopleSoft Workflow

Many tasks that you perform are parts of larger tasks that involve several steps and people working together. For example, when you hire an employee using PeopleSoft Human Resources, you start a process that involves several individuals:

- One who signs up the employee for benefits.
- One who reviews and approves equipment requisitions.
- One who enters tax information for payroll.

PeopleSoft Workflow automates this entire process as well as other processes.

See Also

PeopleTools PeopleBook: Workflow

PeopleTools PeopleBook: Security

Components of PeopleSoft Workflow

A workflow comprises what we call *the three Rs* : rules, roles, and routings. These components work together to ensure that:

- Your organization's business processes are followed.
- Appropriate actions are taken in a timely manner in response to an event.
- The right individuals in your organization are involved in the process.

You use PeopleSoft Application Designer and Security to define the three Rs of workflow: You define rules and routings in PeopleSoft Application Designer and roles through PeopleSoft Security.

Rules

Rules are your company's business practices captured in software. Rules determine when to trigger a business event. For example, the Hire Employee business event is triggered only when a new employee is hired; it isn't triggered if the person you are adding to the database is a PeopleSoft Time and Labor contractor.

In most organizations, the rules are contained in policies and procedures documents. By incorporating the rules into the software, you ensure that people follow them, without requiring extra work of them.

Roles

Roles describe how people fit into the workflow. A role is a class of users who perform the same type of work, such as clerks or managers.

Roles define the *type* of person, rather than the individuals, who performs the work. Identifying roles instead of individual users makes your workflow more flexible and easier to maintain. Roles remain stable even as people change jobs.

For example, your payroll manager must enter certain information for new hires in the system. Who the payroll manager is doesn't matter; it's the person who enters the data that matters. If that person is on vacation, using PeopleSoft Workflow enables you to automatically (and temporarily) route that person's tasks to a substitute.

Routings

Routings connect information to people. Routings determine the method by which data flows from one step or person in a process to another. Routings specify where the information goes and what form it takes: email message, electronic form, or worklist entry.

The network of routings creates a business process from what used to be isolated activities. Routings get the right information to the right people at the right time, enabling users to work together to accomplish the company's goals.

Using Workflow in Your HRMS Business Processes

You don't have to use separate tools to create workflow. When you implement workflow, you consider three things: rules, roles, and routings. As you create your business process maps, you select a routing from the Activity palette. Before you design or modify workflow routings for the first time, you use PeopleSoft Security to define your roles.

Note. While several workflow business processes are delivered with your HRMS system, the system is delivered with all workflow turned off. You must activate PeopleSoft Workflow to use it.

Use PeopleSoft Workflow Administrator to access, monitor, and analyze workflow in your organization. Using PeopleSoft Security, you can add or modify role and role user information. Also use it to maintain the relationship between roles and role users.

Setting Up Workflow Roles and Role Users

When you implement workflow in PeopleSoft HRMS for the first time, you must identify one of the following:

- The individual who performs the role that is referenced in the workflow process.
- The position from which the role is performed.

The individuals (or positions) are called role users. For example, the Hire Employee workflow references a role called Benefits Administrator. Until you assign a role user to act as the Benefits Administrator, there is no one to send email or worklists to.

You can define and use as many roles as you need for your organization's business needs.

Determining Role Users

Although it is optional, we recommend that you enter all of your employees as workflow role users and assign each one a user ID. While some workflow processes involve only a few administrators and supervisors, others might involve almost every employee in your organization.

Once you assign users to roles, workflow processes that reference those roles send emails and worklists to the designated role users.

You must also designate the appropriate email ID, form ID, and user ID for each role user so that emails, forms, and worklists can be generated.

Creating Role Users Using a Message Agent

PeopleSoft HRMS includes a message agent that enters all of your active employees as role users automatically.

While you could manually enter each employee as a role user on the Role User and IDs page, this process is tedious if you're designating many employees as users. Some workflow processes could involve every individual in your organization at one time or another. Using the message agent is a faster way to transform your employees into workflow role users.

Choosing a Supervisor Role

One of the most frequently used and important roles in workflow is that of the Supervisor (or Administrator). Role users that you assign the role of Supervisor are included in worklist, email, and electronic form routings and are often involved in many employee workflow routings. Since the Supervisor role is so important, it is vital to maintain accurate data about those in your organization that act as supervisors and those who report to them.

There are two ways to assign and maintain the Supervisor-role-to-role-user relationship in PeopleSoft HRMS:

- Using the User Profiles component in PeopleSoft Security.
- Using one of the dynamic role user queries in PeopleSoft HRMS.

Using the User Profiles Table

Use the User Profiles - Workflow page (Supervising Role User field) in PeopleSoft Security to manually define supervisor roles. Maintaining the Supervisor role this way requires maintaining your supervisor data in the PeopleSoft HRMS database, where it naturally resides, and in the User Profiles Table. The data in the User Profiles Table is the data that you entered the last time you updated your Supervisor role users in that table.

Using the Dynamic Role User Queries

Use one of the three dynamic Structured Query Reports (SQRs) that query your live human resources database when a workflow involving a Supervisor role is triggered. You select and assign a role user query to the Supervisor routings based on whether you're driving your PeopleSoft Human Resources system by full, partial, or no Position Management. The following table lists the role queries from which you can select. Select the one that is appropriate for your human resources implementation.

Functionality	Query
Full Position Management	[ROLE] Supervisor-Full Posn Mgt (supervisor - full position management)
Position Management turned off	[ROLE] Supervisor-No Posn Mgt
Partial Position Management	[ROLE] Supervisor-Part Posn Mgt

Using the dynamic role user query method ensures that the Supervisor role user assignment is as accurate as your live human resources data. The dynamic query also frees you from maintaining two sets of human resources supervisor data, one in your human resources system and the other in the Role User Table.

The default query is [ROLE] Supervisor-Part Posn Mgt Role User Query. All generic PeopleTools workflows use that query. The query does not run against your live human resources database, but against the Role User Table.

To use one of the other Supervisor role user queries in PeopleSoft Workflow, you must modify all routings involving supervisors.

Workflow Business Processes in PeopleSoft Human Resources

This section discusses each workflow business process, explains how it executes, and points out any special setup considerations that you should consider when using PeopleSoft Workflow for the first time.

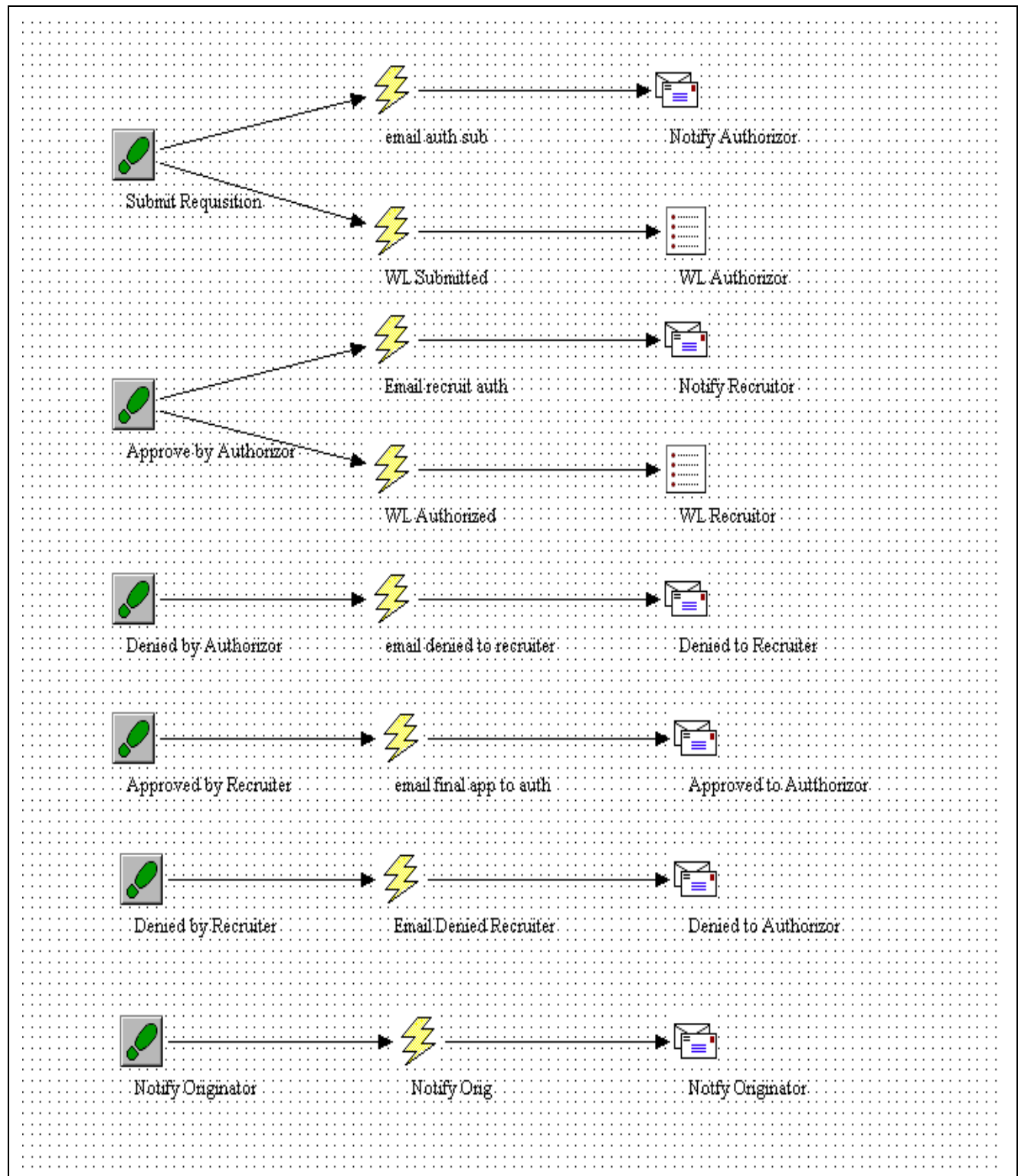
Using Workflow Maps to Understand Workflow

When you design a workflow in PeopleSoft Human Resources using PeopleSoft Application Designer, you create maps for your business process. These maps provide an overview of the workflow at a glance, detailing your organization's business processes, identifying events that trigger a workflow, and specifying roles for notifying, reviewing, and approving workflow events. We include a process flow diagram for each Human Resources business process workflow that is included in your PeopleSoft Human Resources system.

PeopleSoft Application Designer provides a graphical mapping of all of your organization's business processes and related workflows. To see what's happening in any workflow, view it in PeopleSoft Application Designer.

Using Workflow to Submit Requisitions

Use the Submit Requisition workflow to obtain authorization for a new position from an authorizer and recruiter. The following diagram illustrates the Submit Requisition workflow:



Submit Requisition workflow

Where to Find the Submit Requisitions Workflow

Activity Submit Requisition

Event	Submit Requisition
Business Process Map(s)	The Submit Requisition workflow is in Recruit Workforce business process maps in PeopleSoft Human Resources.

Following is a breakdown of the Submit Requisition workflow into its component rules, roles, and routings:

Rules

The business event, Submit Requisition, is triggered when a manager submits a requisition for a new position. The entire Submit Requisition business process takes place within this one event.

Roles

- Originator
- Authorizer
- Recruiter

While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed.

Routings

Role	Email Sent?	Worklists Generated?
Authorizer	Yes	Yes. The system sends the authorizer the worklist that is generated by the information the originator enters when they create the requisition.
Recruiter	Yes	Yes. The system sends the authorizer the worklist that is generated by the information the originator enters when they create the requisition.
Originator	Yes	No.

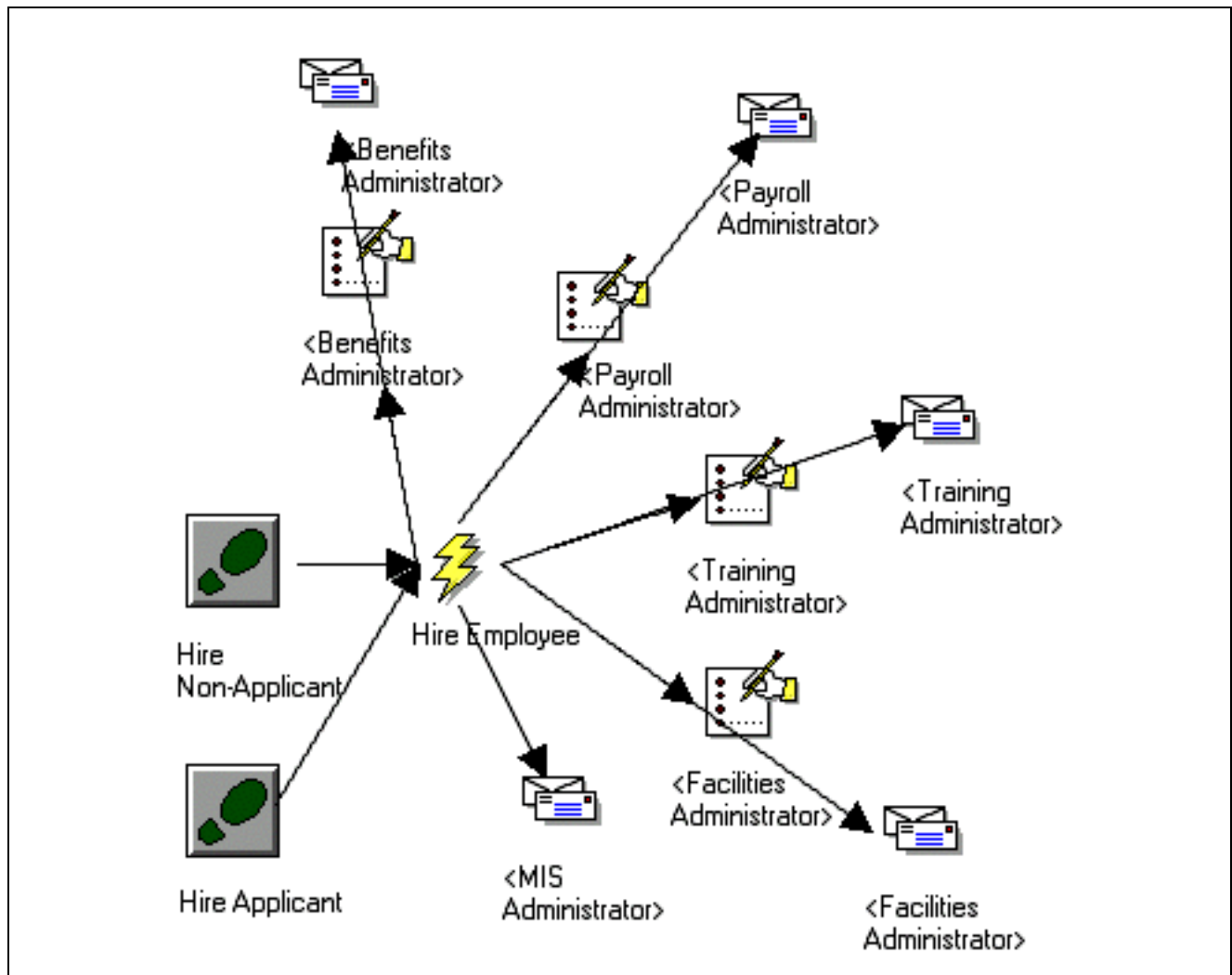
See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce

Using Workflow to Hire Employees

Hiring employees can be time-consuming and involve several individuals in your organization. One person hires the employee into your PeopleSoft Human Resources system; another signs up the employee for benefits; and another gathers information to ensure that the new hire gets paid. Someone else may sign up the employee for introductory training and orientation. There are emails to send and forms to fill out.

With the Hire Employee workflow process, your PeopleSoft Human Resources system handles these items for you automatically. You hire an employee into PeopleSoft Human Resources, and PeopleSoft Workflow completes the process behind the scenes. The following diagram illustrates the Hire Employee workflow:



Hire Employee Workflow

Where to Find the Hire Employee Workflow

Activity	Hire Employee
Event	Hire Employee
Business Process Map(s)	The Hire Employee workflow is in the Administer Workforce and the Recruit Workforce business process maps in PeopleSoft Human Resources.

Following is a breakdown of the Hire Employee workflow into its component rules, roles, and routings:

Rules

The business event, Hire Employee, is triggered when a new employee is hired. The entire Hire Employee business process takes place within this one event.

Once rules are established, they direct the system to send notification about the new hire to roles within the organization.

Roles

- Benefits Administrator
- Payroll Administrator
- MIS Administrator
- Training Administrator
- Facilities Manager
- Compensation Administrator

While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed.

Routings

Role	Email Sent?	Worklists Generated?
Benefits Administrator	Yes	Yes. The system directs the Benefits Administrator to the Manage Benefit Enrollment activity for the new hire.
Payroll Administrator	Yes	Yes. The system directs the Payroll Administrator to the Update Deduction Data activity for the new hire.
MIS Administrator	Yes	No.
Facilities Administrator	Yes	Yes. The system directs the Facilities Administrator to the Company Property pages to issue company property to the new hire.
Training Administrator	Yes	Yes. The system directs the Training Administrator to Enroll Students activity to enroll the new hire in company orientation classes.
Compensation Administrator	Yes	Yes. The system routes an email to the (Variable) compensation administrator to enroll the new hire into an incentive plan.

See Also

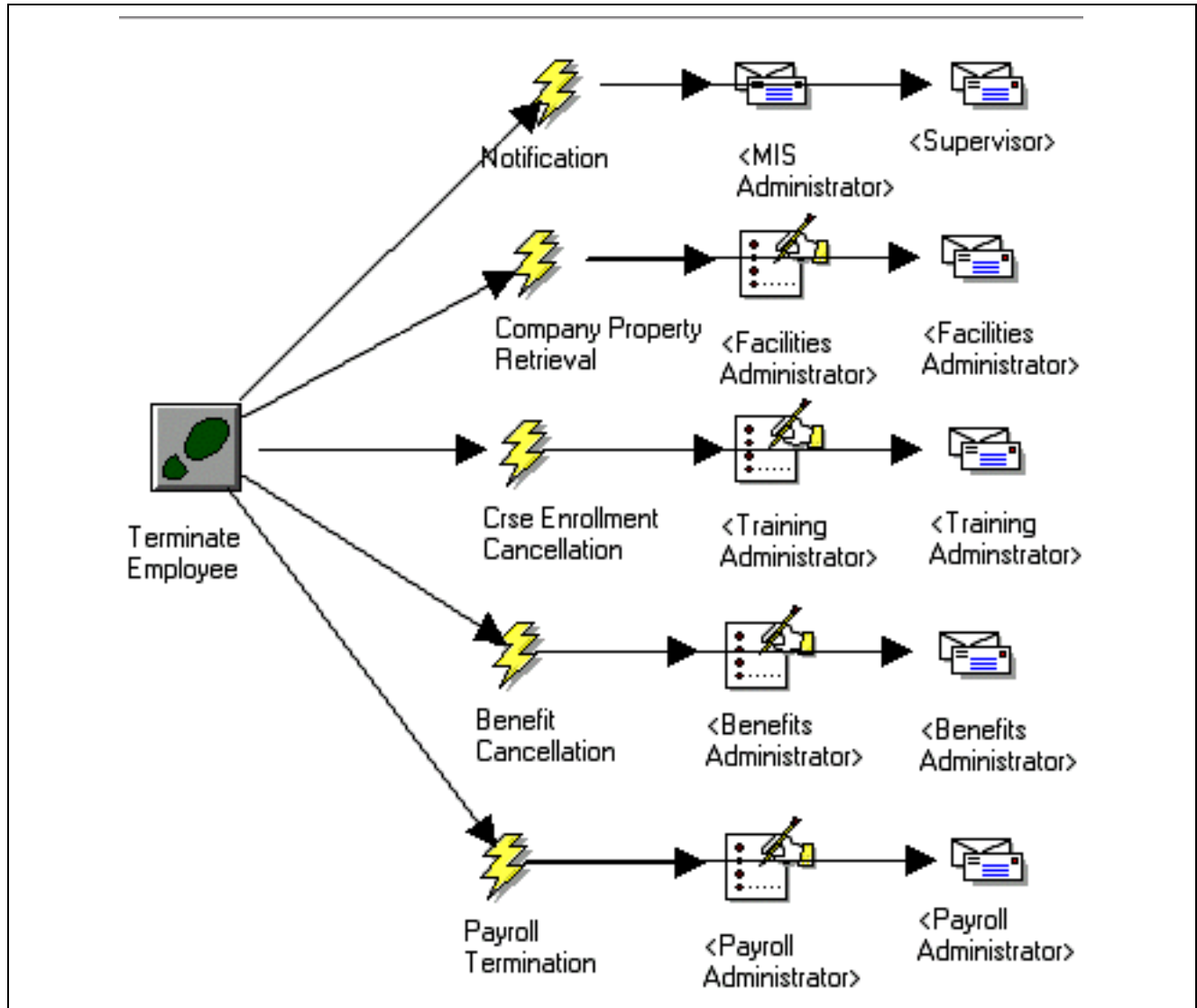
PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

Using Workflow to Terminate Employees

The Terminate Employee workflow streamlines the termination process and makes sure that you process a terminated employee according to your company’s business procedures. By coordinating work between the appropriate administrators, PeopleSoft Workflow ensures that you take the correct actions in response to the employee’s change in status.

When a user terminates an employee on the Job pages, the Terminate Employee workflow generates worklists and emails and routes them to different function administrators to notify them of the termination to be processed. For example, if an employee is enrolled in a course, the system sends an email and a worklist to the training administrator. The email carries important information like the employee ID and the date of termination. The worklist pulls the administrator directly into the page to process the employee.

The following diagram illustrates the Terminate Employee workflow:



Terminate Employee workflow

Where to Find the Terminate Employee Workflow

Activity	Terminate Employee
Event(s)	• Notification • Company Property Retrieval • Crse Enrollment Cancellation (course enrollment cancellation)

- Benefit Cancellation
- Payroll Termination
- Profit Sharing

See *PeopleSoft 8.8 Global Payroll for France PeopleBook*, “Terminating Employees”.

Business Process Map(s) The Terminate Employee workflow is in the Administer Workforce business process map in PeopleSoft Human Resources.

Following is a breakdown of the Terminate Employee workflow into its component rules, roles, and routings:

Rules

- The Business Event, Benefit Cancellation is triggered when a terminated employee is enrolled in a benefit program.
- The Business Event, Company Property Retrieval is triggered when a terminated employee has company property that was issued but not returned.
- The Business Event, Crs Enrollment Cancellation is triggered when a terminated employee is still enrolled in a course.
- The Business Event, MIS Notification is triggered when an employee is terminated. It performs no further verification because an employee is likely to have system IDs and passwords outside the PeopleSoft system (for example, email).
- The Business Event, Payroll Termination is triggered when a terminated employee should be issued another paycheck by PeopleSoft Payroll for North America.
- The Business Event, Supervisor Notification is triggered when an employee is terminated. No further verification is done.
- The Business Event, Profit-sharing is triggered when an enrolled in a profit-sharing agreement is terminated.

Once rules are established, they direct the system to send email or generate worklists for role users when an employee is terminated.

Roles

- Benefits Administrator
- Payroll Administrator
- MIS Administrator
- Training Administrator
- Facilities Manager
- Supervisor
- Employee (for profit sharing)

While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed. If no email ID, form ID, or operator ID is indicated, PeopleSoft Workflow cannot generate the appropriate emails, electronic forms, and worklists.

Routings

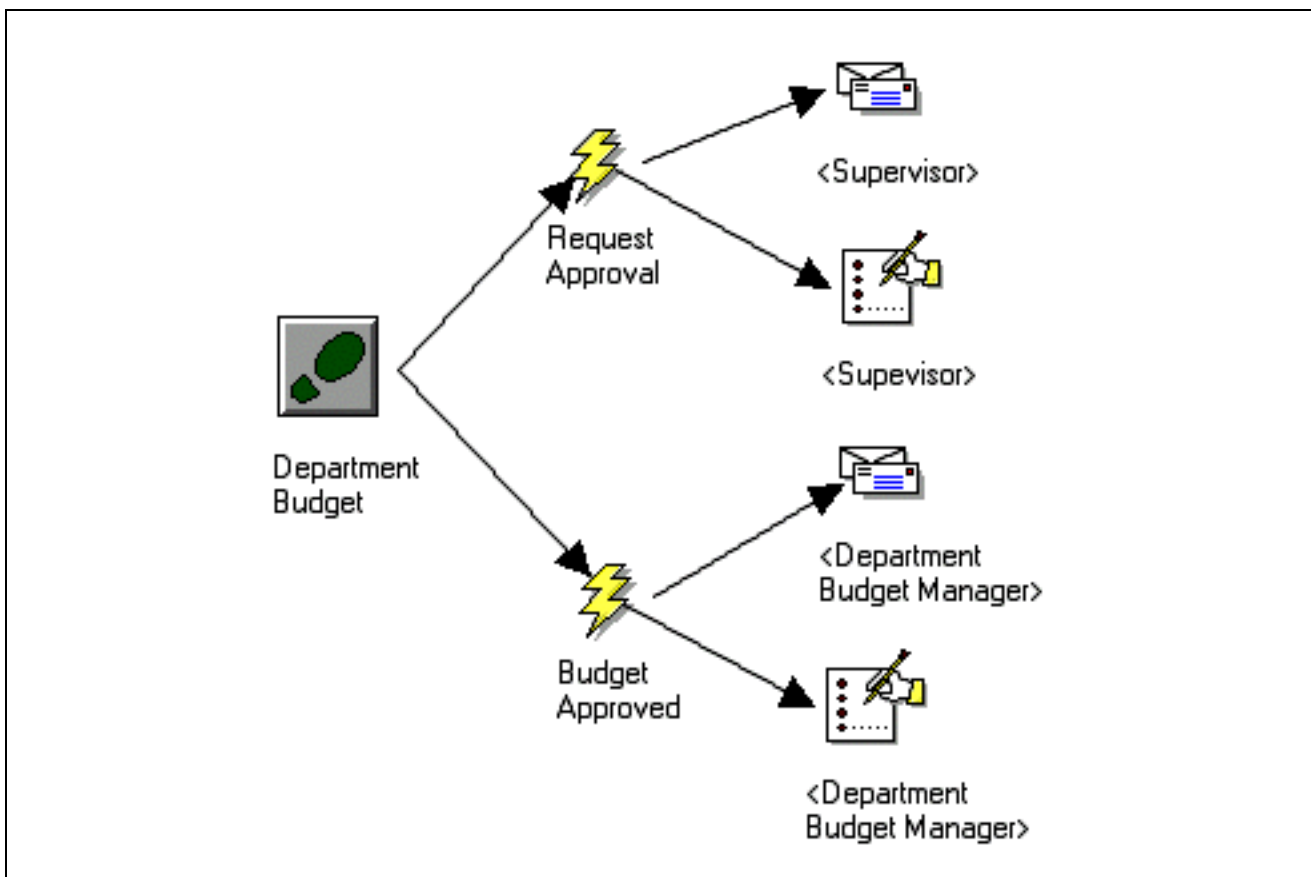
Role	Email Sent?	Worklists Generated?
Benefits Administrator	Yes	Yes. The system directs the Benefits Administrator to the Manage Benefit Enrollments activity for the terminated employee.
Payroll Administrator	Yes	Yes. The system directs the Payroll Administrator to the Update Employee Payroll Data activity for the terminated employee.
MIS Administrator	Yes	No.
Training Administrator	Yes	Yes. The system directs the Training Administrator to the Maintain Training Tables activity.
Supervisor	Yes	No.
Facilities Administrator	Yes	Yes. The system directs the Facilities Administrator to the Company Property activity for the terminated employee.
Employee	Yes	Yes. The system directs the Employee the Agreement Personalization page.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information”

Using Workflow to Maintain Budgets

Updating and maintaining salary budgets for departments in an organization can be time-consuming and intensive, involving many levels of managers and administrators. The Maintain Budgets Workflow streamlines this process by handling routing budget change requests and budget approvals for departments. PeopleSoft Workflow ensures that your organization’s budget approval rules are followed and that the proper supervisors and managers approve any changes in budgeting. The following diagram illustrates the Maintain Budgets workflow:



Maintain Budgets workflow

Where to Find the Maintain Budgets Workflow

Activity	Maintain Budgets
Event(s)	• Request Approval • Budget Approved
Business Process Map(s)	The Maintain Budgets activity is in the Plan Salaries business process map in Human Resources.

Following is a breakdown of the Maintain Budgets workflow into its component rules, roles, and routings:

Rules

This business event is triggered when the department budget manager requests a department budget change by clicking the Request Approval button on the Group Increase Budget - Budget Requested page.

Note. If workflow is not turned on, the Request Approval button doesn't appear in the Group Increase Budget - Budget Requested page.

- The group manager's supervisor either approves the new budget and saves the page or denies the budget change request.

- If the group manager's supervisor approves the request, the system routes an email to the group manager, indicating that the change is approved, and enters a worklist item for the group manager so that salary changes can be made for employees in the affected group.

Once you establish the rules for this workflow, they direct the system to send email or generate worklists for role users when a department budget change is requested or processed.

Roles

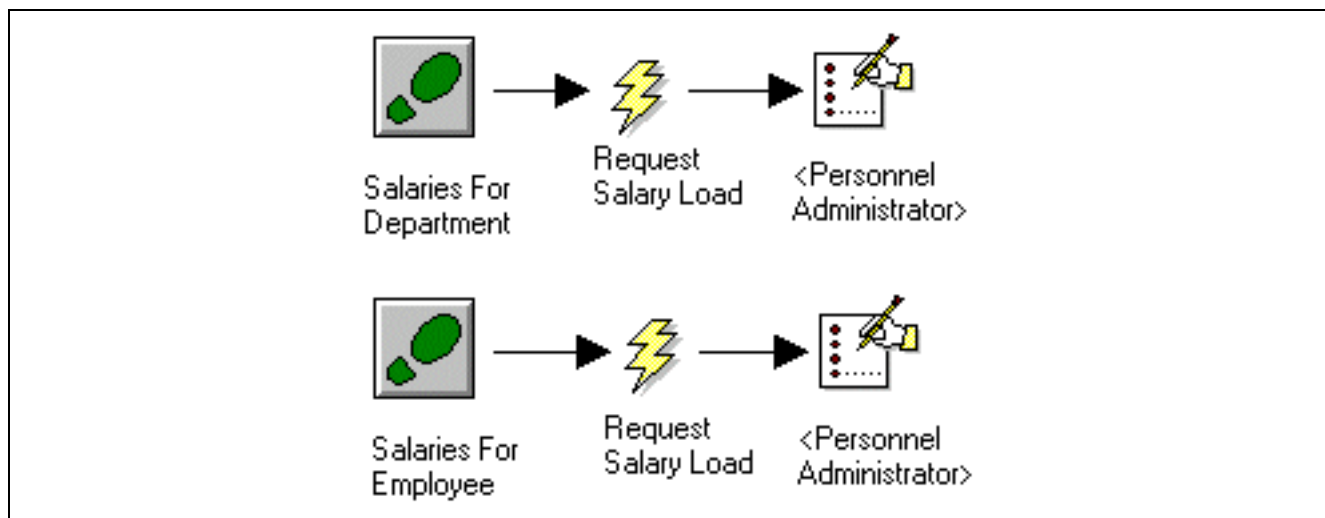
- Group Manager
- Supervisor of the Group Manager

Routings

Role	Email Sent?	Worklists Generated?
Supervisor	Yes	Yes. The system directs the supervisor to the Maintain Budgets activity.
Department Budget Manager	Yes	Yes. The system directs the Department Budget Manager to the Change Salaries activity.

Using Workflow to Change Salaries

Requesting and approving salary changes for employees is a process that readily lends itself to PeopleSoft Workflow. When you evaluate and request changes for employees, either individually, or by department, the system routes a worklist to the personnel administrator to approve or deny the proposed salary changes. The following diagram illustrates the Change Salaries workflow:



Change Salaries workflow

Where to Find the Change Salaries Workflow

Activities

- Change Salaries For Groups of Employees
- Change Salaries For Employee

Event	Request Salary Load
Business Process Map(s)	The Change Salaries activity is in the Plan Salaries business process map in Human Resources.

Following is a breakdown of the Change Salaries workflow into its component rules, roles, and routings:

Rules

The business event is triggered when an authorized user clicks the Request Load button after manually entering salary changes Salary on the Salary Planning by Group pages.

Note. If workflow is not turned on, the Request Load button doesn't appear on these pages.

The system creates a worklist for the Personnel Administrator to perform final approval and to load the salaries, if they are approved.

The rules for this workflow direct the system to generate a worklist for role users when an authorized user enters a salary change for employees, using either the Salary Plan by Group or the Salary Plan Employee pages.

Roles

Personnel Administrator

Routings

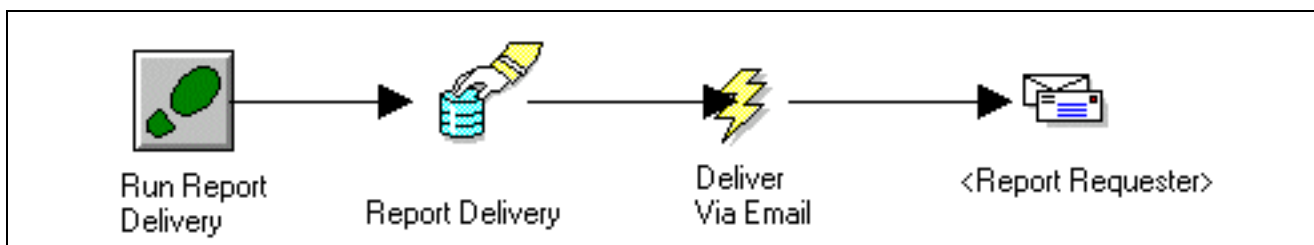
Role	Email Sent?	Worklists Generated?
Personnel Administrator	No	Yes. The system directs the Personnel Administrator to the Post Raises to Job activity.

Using Workflow to Deliver Reports

Using the Deliver Reports workflow, you can schedule your system to generate reports on a regular basis and to route the reports through email to role users for immediate review.

This workflow enables users to schedule multiple reports and have them emailed to role users. The workflow contains sample reports using the As of Date parameter across the PeopleSoft Human Resources system.

The following diagram illustrates the Deliver Reports workflow:



Deliver Reports workflow

Where to Find the Deliver Reports Workflow

Activities	Schedule HR Mass Reports and Deliver Reports

Event	Deliver Through Email
Business Process Map(s)	The Deliver Reports activity is in the Workflow - HR Administrator business process map in Human Resources.

Following is a breakdown of the Deliver Reports workflow into its component rules, roles, and routings:

Rules

The reports are improvised when a user schedules them in the As-of-Date Mass Report. The Report Delivery database agent delivers the reports. We recommend that you schedule Report Delivery to execute regularly.

Roles

Report Requester (any role user with an email ID)

Routings

Role	Email Sent?	Worklists Generated?
Report Requester	Yes	No

Defining a Mass Report

This section discusses how to define a mass report.

Pages Used to Define a Mass Report

Page Name	Object Name	Navigation	Usage
As-Of-Date Mass Report - Run Control Params (as-of-date mass report - run control parameters)	MASS_RPT_01_HR	Workforce Administration, Workforce Reports, Create As-Of-Date Mass Report	Define a mass report. Do this before designating recipients.
As-Of-Date Mass Report - Delivery List	MASS_RPT_02_HR	Workforce Administration, Workforce Reports, Create As-Of-Date Mass Report	Designate the role users who are to receive a copy of your report.

Defining a Mass Report

Access the As-Of-Date Mass Report - Run Control Params page.

Run Control Params **Delivery List**

Mass Report ID: 246

Description:

Report and Parameter Find | View All First 1 of 1 Last

Seq: ***Process Name:**

As Of Date: 11/07/2002 **Language Code:** English

Run Control Params page

Report and Parameter

Seq (sequence number)	System-displayed.
Process Name	Select from the list of options.
As of Date	This date acts as part of the report's selection criteria: To report on data up to today's date, enter today's date.
Language Code	If the report is available in the language that you specify, the system prints it in that language. Otherwise, the report is printed in English.

Note. The Language Code appears by default from the Base Language Code that you establish on the PeopleTools Options Table.

See Also

[Chapter 5, "Working With Languages ,," page 39](#)

Designating Role Users Who Receive the Report

Access the As-of-Date Mass Report - Delivery List page.

Run Control Params | **Delivery List**

Mass Report ID: 246 Run Control Work

Report Find | View All | First ◀ 1 of 1 ▶ Last

Seq: Process Name:

Report Delivery List Customize Find View All ◻		First ◀	1 of 1	▶ Last
*User ID	Description			
🔍				

Delivery List page

In the Report Delivery List group box, enter each role user who is to be a recipient.



Click the Run Control Work button to execute the Mass Reporting workflow process. The workflow generates the reports listed on the Run Control Params page.

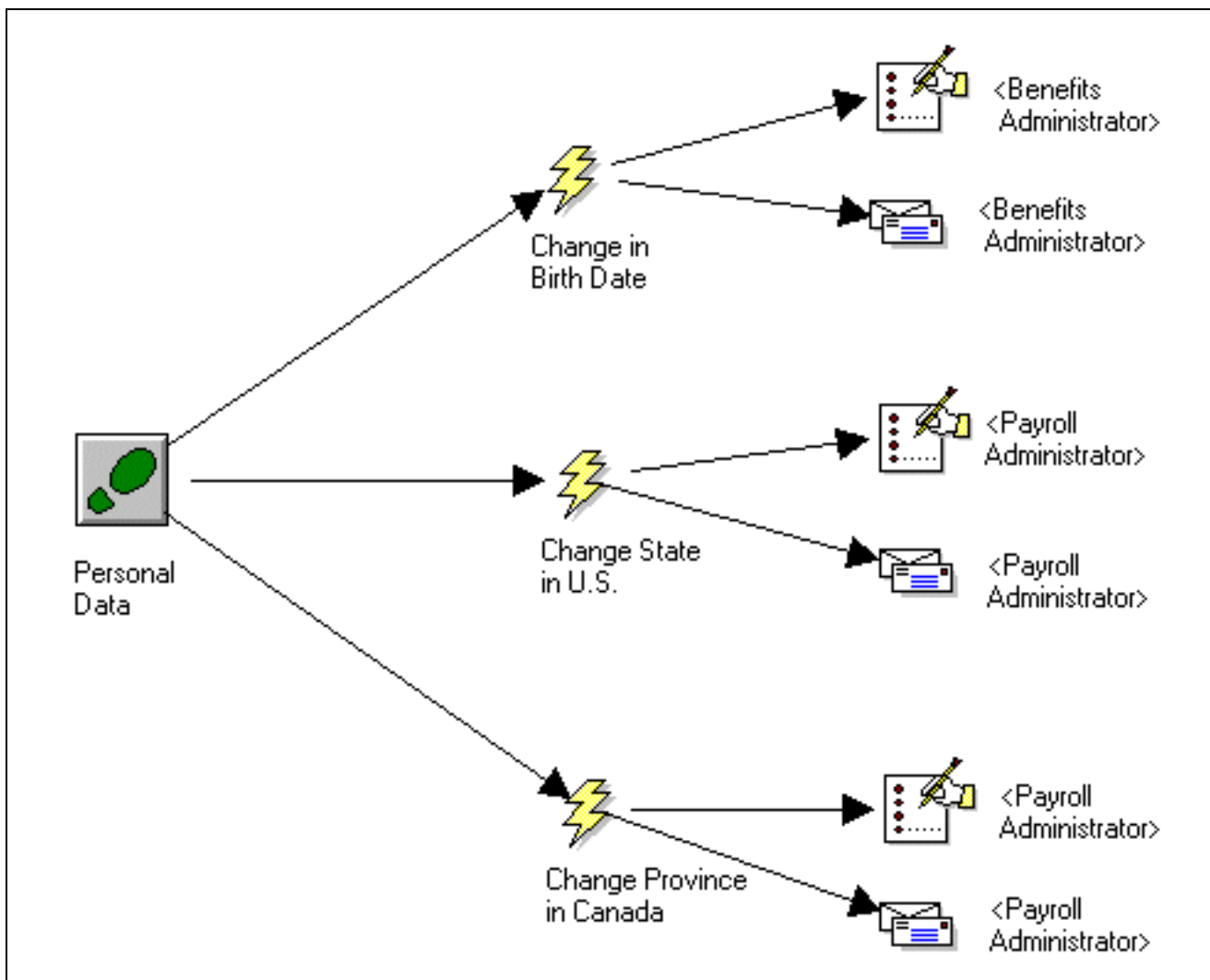
Generate the mass change reports on a dedicated Windows server. As workflow generates the reports, they collect on this server until the scheduled delivery date and time.

You must deliver reports from the same dedicated Windows server from which the reports are generated. You should have an active PeopleSoft window running on this server prior to scheduling the reports for delivery.

To schedule reports for delivery, select Workflow Administrator, Process, Database Agent, run the process and select Report Delivery from the database agent list on the Process Scheduler Request page. We suggest that you schedule mass reports on a regular basis.

Using Workflow to Maintain Personal Data

The Maintain Personal Data workflow automates the process that you use to change employee birth date information and ensures that the payroll administrator is notified when U.S. employees change states or Canadian employees change provinces. The following diagram illustrates the Maintain Personal Data workflow:



Maintain Personal Data workflow

Where to Find the Maintain Personal Data Workflow

Activity Maintain Personal Data

Events

- Change in Birthday
- Change State in U.S.
- Change Province in Canada

Business Process Map(s) The Maintain Personal Data workflow is in the Administer Workforce business process map in PeopleSoft Human Resources.

Following is a breakdown of the Maintain Personal Data workflow into its component rules, roles, and routings:

Rules

- If an employee submits a change in birth date, the Benefits Administrator must be notified to process the change.

- If a U.S. employee moves to another state, the Payroll Administrator must be notified.
- If a Canadian employee moves to another province, the Payroll Administrator must be notified.

Once rules are established, they direct the system to send email or generate worklists for role users when employees change their birth date or move to a new state or province.

Roles

- Benefits Administrator
- Payroll Administrator

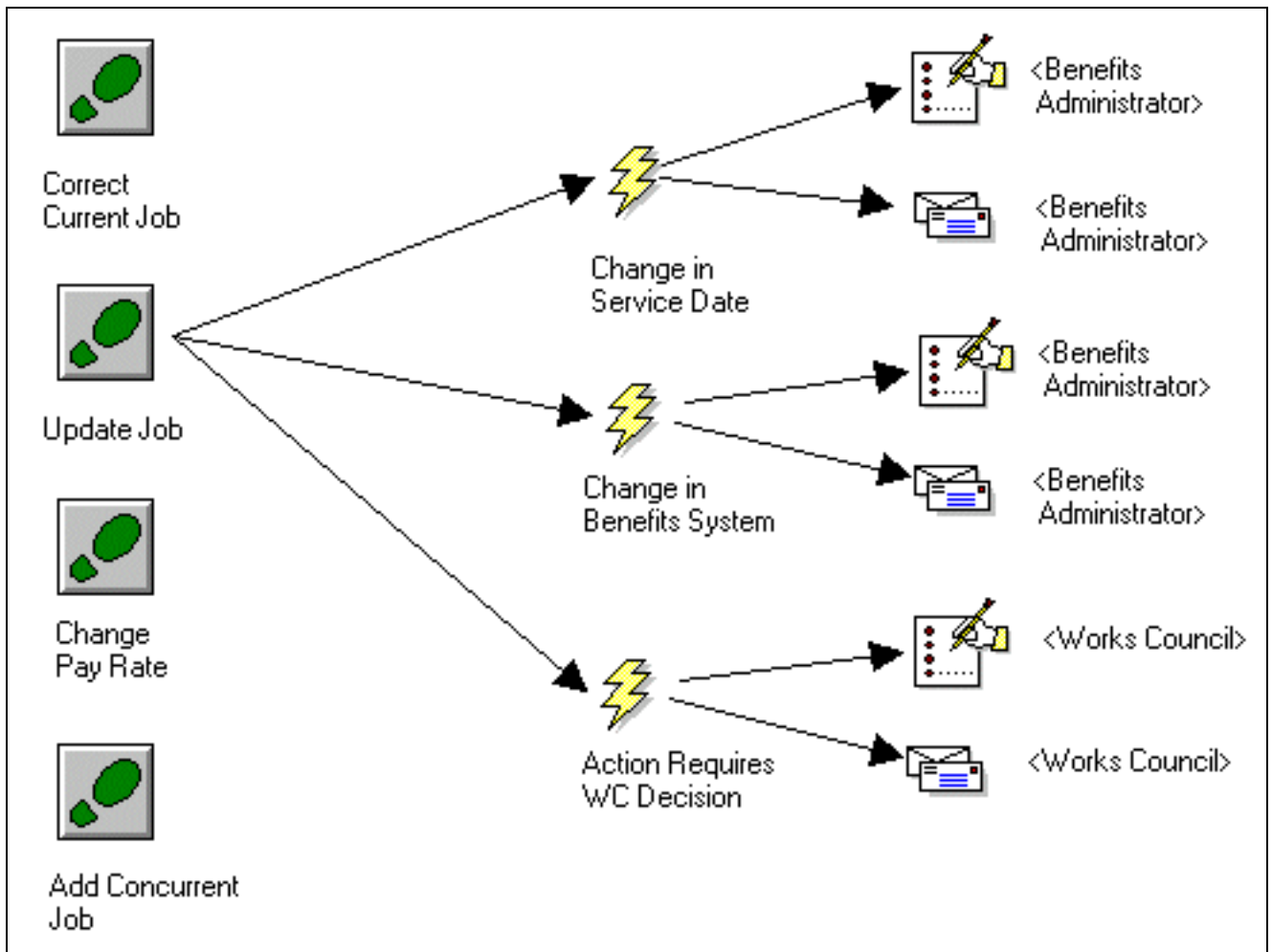
While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed. If you haven't indicated an employee ID and an email ID, PeopleSoft Workflow cannot generate the appropriate emails and electronic forms.

Routings

Role	Email Sent?	Worklists Generated?
Benefits Administrator	Yes	Yes. The Benefits Administrator is routed to the Personal Data pages.
Payroll Administrator	Yes	Yes. The Payroll Administrator is routed to the Update Employee Payroll Data activity, or the Update Employee Payroll Data CAN activity, as appropriate.

Using Workflow to Maintain Job Data

The Maintain Job Data workflow automates the processes that you use to update employee service dates and change employee benefits programs. For a German workforce, this workflow also initiates the review of personnel actions by the German Works Council. The following diagram illustrates the Maintain Job Data workflow:



Maintain Job Data workflow

Where to Find the Maintain Job Data Workflow

Activity	Maintain Job Data
Events	• Change in Service Date • Action Requires Works Council Decision • Change in Benefits System
Business Process Map(s)	The Maintain Job Labor workflow is in the Administer Workforce business process map in PeopleSoft Human Resources.

Following is a breakdown of the Maintain Job Data workflow into its component rules, roles, and routings:

Rules

- If the employee's service date (EMPLOYMENT.SERVICE_DT) has changed, the Benefits Administrator must be notified to initiate appropriate action.
- If the Benefits field on Employment is modified, the Benefits Administrator must be notified.

- If a Job Action/Reason requires a decision by the German Works Council, the Works Council representative needs to be notified.

Once rules are established, they direct the system to send email or generate worklists for role users when the system finds an employee whose next review date has passed.

Roles

- Benefits Administrator
- Works Council Representative

While different individuals in your organization can fill these roles, the roles must be assigned to an individual role user if the rules and routings are to be followed. If you haven't indicated an employee ID and an email ID, PeopleSoft Workflow cannot generate the appropriate emails and electronic forms.

Routings

Role	Email Sent?	Worklists Generated?
Benefits Administrator	Yes	Yes
Works Council Representative	Yes	Yes. The system directs the Works Council representative to the Works Council Decision inquiry page.

See Also

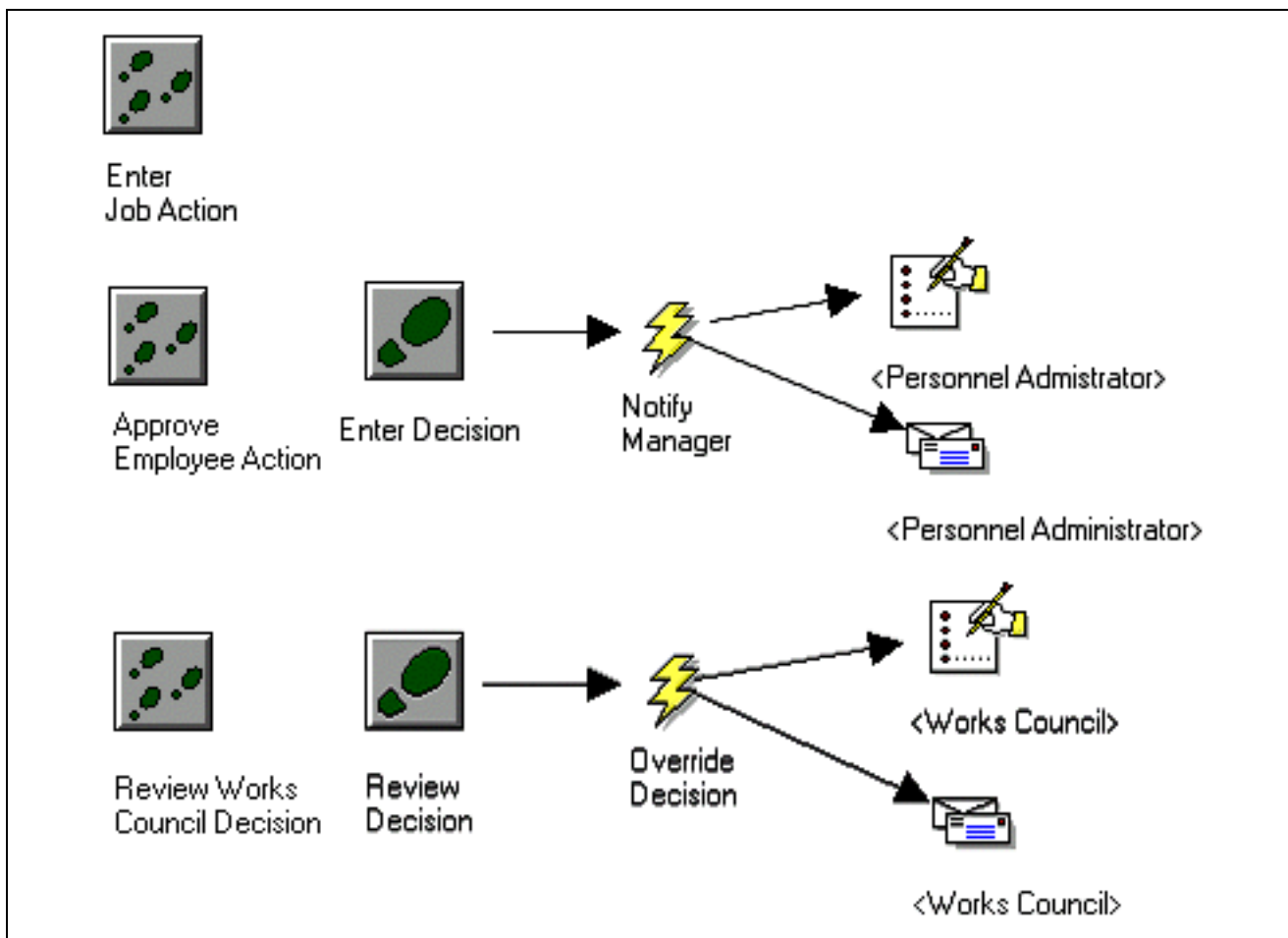
PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations, "Setting Up Labor Relations Data," (DEU) Setting Up German Works Councils Business Process

Using Workflow to Review German Works Council Decisions

The German Works Council Decision workflow automates Works Council reviews of proposed personnel actions for German operations. The events that lead up to the workflow begin when a personnel action for a German employee who is associated with the DEU regulatory region is entered into Job Data. If the Action Reason is associated with a Works Council Decision Group that requires notification to the Works Council, then a workflow is initiated. This workflow is described in the previous heading, "Using Workflow to Maintain Job Data."

Once the Works Council member is notified, the member uses the Works Council Decision pages to review and respond to the personnel action. If the Works Council decides to change the proposed personnel action, then the workflow notifies the person in the Personnel Administrator role (usually the Human Resources manager) by sending an email and a worklist.

The Personnel Administrator uses the Decisions - Germany page to review the Works Council's decision to change the proposed personnel action. If the Personnel Administrator overrides the Works Council decision, the workflow notifies the Works Council by sending an email and a worklist. In the following diagram, this is represented by the Review Works Council Decision activity:



German Works Council Decision workflow

Where to Find the German Works Council Decision Workflow

Activity	Review Works Council Decision
Event(s)	Override Decision
Business Process Map(s)	Manage Labor Relations: German Works Council Business Process

Following is a breakdown of the German Works Council Decision workflow into its component rules, roles, and routings.

Rules

- The business event Override Decision is triggered when the HR Manager overrides a Works Council Decision using the Decisions - Germany page.
- The Works Council representative must be notified.

Roles

Works Council representative.

Routings

Role	Email Sent?	Worklist Generated?
Works Council representative	Yes	Yes

Where to Find the Approve Employee Action Workflow

Activity Approve Employee Action

Event(s) Notify Manager

Business Process Map(s) Manage Labor Relations: German Works Council Business Process

Following is a breakdown of the Employee Action workflow into its component rules, roles, and routings:

Rules

- The business event Notify Manager is triggered if the decision entered by the Works Council representative on the Works Council Decision page needs to be acted on by the Human Resources (HR) Manager.
- The HR Manager must be notified.

Roles

Personnel Administrator (HR Manager)

Routings

Role	Email Sent?	Worklist Generated?
Personnel Administrator	Yes	Yes

CHAPTER 27

Generating Form Letters

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

- Generate form letters for PeopleSoft Human Resources.
- Generate form letters for HRMS applications other than Human Resources.
- Prepare to print form letters.
- Adapt form letters to other tasks.
- Set up standard letter codes.

Using Form Letters

You can generate form letters for PeopleSoft Human Resources tasks or for other PeopleSoft HRMS applications. The method of creating form letters for PeopleSoft Human Resources is different than it is for the other HRMS products. Please follow the appropriate instructions to successfully create your form letters.

Before You Begin

Generate the sample form letters that are included with PeopleSoft HRMS from PeopleSoft Process Scheduler. You run a job that executes an SQR to extract data from the database and merge it into a Word for Windows document template. The system posts the resulting letters on the Web Server.

The delivered sample form letters that are created using SQRibe Technology's Structured Query Report Writer to extract data from the database and Microsoft Word for Windows as the word processor.

If you use a different report writer or word processor, use the information in this chapter to understand the steps that are involved in generating form letters. Then consult your report writer or word processor documentation to modify the procedures to fit the sample letters or use PeopleSoft Process Scheduler in PeopleSoft Human Resources to generate the letters.

Once you're familiar with the sample letters, you can modify the form letters (or create new ones) for other tasks.

See Also

Chapter 27, "Generating Form Letters," Adapting Form Letters, page 483

Understanding PeopleSoft Form Letters

Many human resource management activities involve sending out routine letters and memos on a regular basis, for example:

- (PeopleSoft Human Resources) Letters acknowledging resumes, job postings, and job offers.
- (PeopleSoft Human Resources) Letters of rejection following interviews.
- (PeopleSoft Human Resources) Letters announcing course session enrollments, cancellations, and rescheduling.
- (PeopleSoft Global Payroll, Pension Administration, Benefits) letters, notification forms, and plan updates.

The wording of such letters doesn't change much from mailing to mailing; what changes is information like names, addresses, and dates. In PeopleSoft Human Resources, you can create form letters in your word processor by accessing the data that you need from your human resources database.

Using Microsoft Word for Windows, PeopleSoft delivers sample form letters for these areas of human resources:

- Recruitment
- Training Administration
- Manage Labor Relations

You can generate several types of letters and print them all at the same time or you can generate letters now and print them later, if you prefer to review them first. Two sample form letters are provided at the end of this chapter.

Note. To generate letters, you should be familiar with the Microsoft Word for Windows mail merge functions. If you are not, see the *Microsoft Word for Windows User's Guide*.

Generating Human Resources Form Letters

Before you generate any form letters or modify any of the sample form letters that are delivered with PeopleSoft Human Resources, you need to understand how the process works.

Following is an overview of the process for generating form letters for Human Resources:

Note. These instructions are for creating form letters using PeopleSoft Human Resources templates only. If you are creating form letters for other PeopleSoft HRMS applications, see *Generating Form Letters for HRMS Applications*.

See [Chapter 27, "Generating Form Letters," Generating Form Letters for HRMS Applications, page 487](#).

1. Create letter codes using the Standard Letter Table. Each standard letter is represented by a code that you enter on pages to generate a form letter. The Letter Code field is used in Recruit Workforce, Administer Training, and Manage Labor Relations.

See [Chapter 27, "Generating Form Letters," Setting Up Standard Letter Codes, page 486](#).

2. To prepare to generate form letters, tag records in the PeopleSoft Human Resources database that you want to extract data from. You do this by inserting a letter code into the records of applicants, employees, or non-employees.

For example, when you enroll or add students to waiting lists for training courses, the system inserts letter codes into employee and non-employee records. You create letter codes in the Standard Letter Table.

3. Use a job that contains the SQR to extract the necessary data, the WinWord process WORDINIT, and the Application Engine PSMERGE.

The SQR searches the PeopleSoft Human Resources database, retrieves data from tagged records, and create data extract files containing data for each letter. The system also updates the Print Date field in applicant or student records so that the next time you run the SQRs, the system won't extract data for letters you've already printed.

When the data is extracted, the job runs the macros that merge the data extract files into form letter templates, one for each type of letter, and post them to the report repository on the web server.

PeopleSoft delivers PSMERGE Word macro , contained in the PSMERGE.DOT file, to enable you to generate form letters using PeopleSoft Process Scheduler.

4. Send training letters by email.

This step is for the training letters only. The system also emails training letters to students if their email address is in their employee record.

5. Print the letters using Word for Windows.

The system creates the form letters in a temporary directory on the web server, putting all letters of the same type in one file.

The distributed architecture of your PeopleSoft Human Resources system means that your application server can be located far from your machine, so the system doesn't print letters to a default printer. Instead, you select where you want to print the letters using standard Word for Windows print options.

See Also

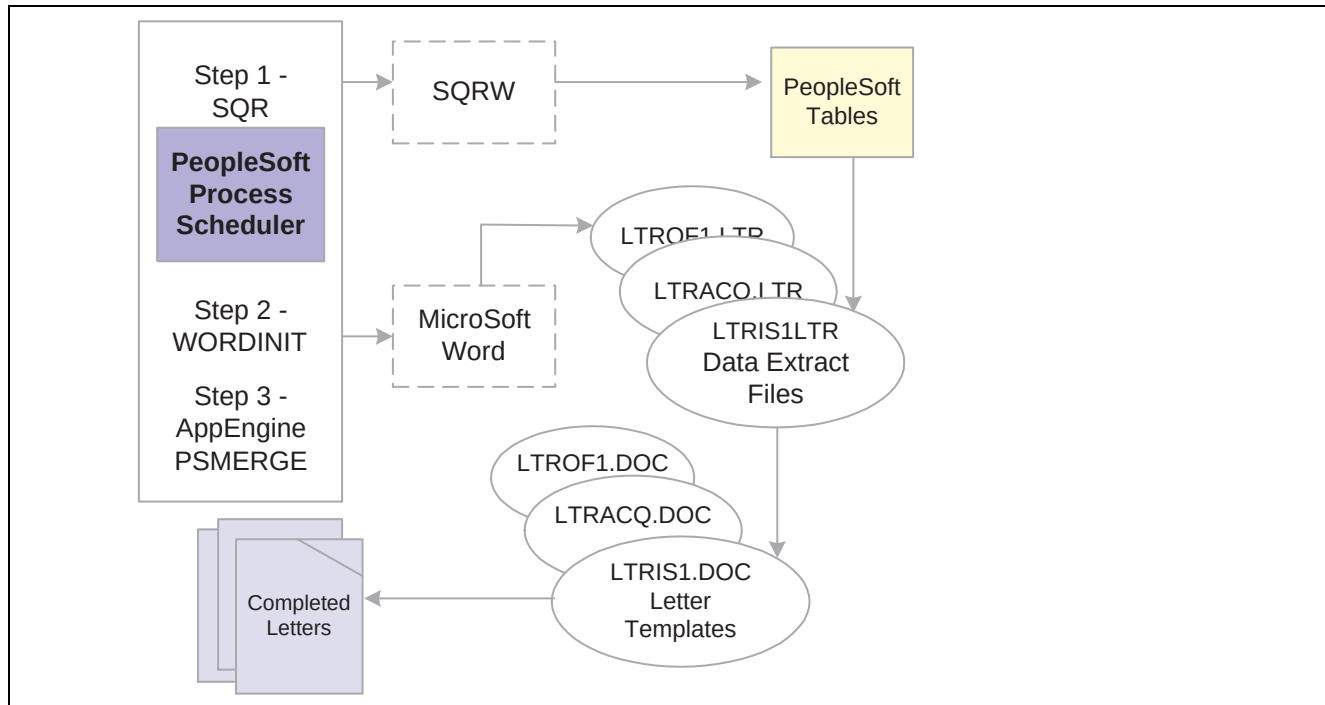
PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Processing Applicants,"
Generating Recruitment Letters

PeopleSoft 8.8 Human Resources PeopleBook: Administer Training, "Enrolling and Waitlisting Students"

PeopleSoft Human Resources PeopleBook: Manage Labor Relations

Generating Form Letters With PeopleSoft Process Scheduler

The following diagram illustrates generating form letters using PeopleSoft Process Scheduler:



Generating HR form letters using PeopleSoft Process Scheduler

1. SQR APP007:

- a. Scans the recruitment records (Applicant Data, Applicant Activity - Positions, Applicant Activity - Interviews, and Applicant Activity - Offers) that contain letter codes and have no print date.
- b. Retrieves the information from the records.
- c. Updates the Print Date field in applicant records.
- d. Creates the data extract files.

The data extract files have names with 3-letter module references and a letter code. For example, the file containing data for offer letters is LTROF1.LTR, where OF1 represents offer letter, and .LTR represents letter.

2. The WinWord Process WININIT initializes the merge processes.

3. The Application Engine PSMERGE:

- a. Opens the form letter templates that correspond to the data extract files.
- b. Merges the appropriate extract file data into the field codes for each template.

For offer letters, the template is called LTROF1.DOC and it includes field codes for names, addresses, and offer amounts.

- c. Inserts the data from LTROF1.LTR into the template field codes.

Naming Conventions in Form Letter Files

Before you adapt existing form letters or create new ones, you should be familiar with the naming conventions for each element of the process. Use the same naming conventions for the new form letter components that you create.

Letter Codes

You create Letter Codes in the Standard Letter Code Table. The standard letter codes that are delivered by PeopleSoft for use with the sample letters are listed in this table.

Data Extract Files and Corresponding Word Letter Templates

The extension .LTR represents form letters and the extension .DOC is the normal templates extension. Every letter code that you generate form letters for must have a corresponding data extract file and a template with the same name of the data extract file.

For example:

new letter code	XYZ
data extract file name	AAAXYZ.LTR
template name	AAAXYZ.DOC

Here are the letter codes and their associated data extract files and Word templates:

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
<i>Recruitment Letters</i>			
Acknowledgement	LAQ	LTRLAQ.LTR	LTRLAQ.DOC
Acknowledgment of resume receipt	ACQ	LTRACQ.LTR	LTRACQ.DOC
No current opening letter	ANO	LTRANO.LTR	LTRANO.DOC
Rejection after an interview	IR	LTRIR.LTR	LTRIR.DOC
Job offer 1 letter	OF1	LTROF1.LTR	LTROF1.DOC
Job offer 2 letter	OF2	LTROF2.LTR	LTROF2.DOC
<i>Training Letters</i>			
Confirmation of session enrollment	CON	LTRCON.LTR	LTRCON.DOC

Purpose of Letter	Letter Code	Data Extract File	Word Letter Template
Rescheduling of course session	RSC	LTRRSC.LTR	LTRRSC.DOC
Cancellation of course session	CAN	LTRCAN.LTR	LTRCAN.DOC
<i>Labor Relations Letters</i>			
Confirmation of Disciplinary Action Filed	DAF	LTRDAF.LTR	LTRDAF.DOC
Confirmation of Disciplinary Action Resolution	DAR	LTRDAR.LTR	LTRDAR.DOC
Confirmation of Grievance Filed	GRF	LTRGRF.LTR	LTRGRF.DOC
Confirmation of Grievance Resolution	GRR	LTRGRR.LTR	LTRGRR.DOC

Note. The Standard Letter Table also contains two codes, WTC and WTS, that are used in Administer Training for students on waiting lists. However, these codes don't have macros or sample letters associated with them.

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file. Depending on your configuration, you may need to make the following changes to the standard Word for Windows macros that are supplied by PeopleSoft:

To set up your system to print form letters:

1. On the Process Scheduler Definition page create a new dedicated Process Scheduler leaving the checkbox "Transfer System Files to Report Repository" unselected to run form letters.
2. Define the WINWORD variable in your Process Scheduler Configuration file.

WINWORD defines the location of the Word for Windows executable file that the process scheduler runs to produce the form letters. For example, if Word for Windows is run on the application server, you might have this line in the process scheduler configuration file:

```
WINWORD=C:\APPS\OFFICE97\OFFICE
```

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Adapting Form Letters

Form letters are useful for many administrative tasks besides those for which we deliver sample letters. You can modify the sample form letters in several ways, from simple changes to text in the templates to adding the Letter Code field to other pages in PeopleSoft Human Resources.

This section discusses how to adapt form letters, as follows:

- Change the text in sample form letters so that it suits your organizational needs; for example, change the author name and title.
- Extract values from other fields in PeopleSoft Human Resources and insert them into the form letter templates; for example, add a currency code field to the job offer letter.
- Create new form letters for different purposes; for example, to notify applicants of interview appointments.
- Add the Letter Code field to other pages in PeopleSoft Human Resources and create form letters for them. For example, add the Letter Code field to Employee Review in Plan Salaries and create a form letter to advise employees of upcoming reviews.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft Human Resources contain sample text for different types of tasks, which you can change to suit your needs. For example, you'll probably want to change the sender name in the letters to the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used on pages and tables that are referenced in PeopleSoft Human Resources, follow the procedure below.

To modify the text in a form letter:

1. Find the Word letter template to update.

Templates are listed in Naming Conventions for Form Letter Files and are located in the directory \PS\WINWORD.

2. In Microsoft Word for Windows, open the document to modify.

If you see “ ” in the document, select Tools, Options; then select the Field codes check box.

3. Make changes to the text as you would in any other document, and save the file.

In the example letter below, we changed the author from Barbara Smith, Employment Coordinator to Jay Ferreira, Recruitment Specialist.

Warning! Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that extracted from PeopleSoft Human Resources.

{MERGEFIELD System Date}

{MERGEFIELD Line1}

{MERGEFIELD Line2}

{MERGEFIELD Line3}

{MERGEFIELD Line4}

{MERGEFIELD Line5}

{MERGEFIELD Line6}

Dear {MERGEFIELD Salutation}:

I am pleased to offer you a position at PeopleSoft at a starting salary of {MERGEFIELD Offer_Amt}. Salary payments are made on the last working day of each month. You are provided with 15 paid leave days during each calendar year with the Paid Time Off program.

Following a one-month waiting period, you will be eligible for our company-paid benefits package, which includes the medical/dental, vision, life insurance, and disability benefits described in the attached brochure.

You will be eligible to participate in the 401(k) plan beginning the first quarter after your hire date. You are also eligible for the PeopleSoft Stock Option plan. Grants are made at the discretion of management based on performance and significant contribution to achieving corporate goals.

I believe that PeopleSoft has tremendous potential as a company that provides great opportunities for personal growth, challenging work, and financial rewards. We look forward to your joining the PeopleSoft team.

Sincerely,

Jay Ferreira

Recruitment Specialist

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft Human Resources. For example, if you routinely make job offers using multiple currencies, you might want to include a currency field code in the Recruitment job offer letter.

Note. To make this change, you should be familiar with Microsoft Word for Windows fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all the fields that you want to use and writes them to the appropriate data extract files.

For example, to include currencies in the job offer letter LTROF1.DOC, add a Currency field code to the form letter template. Also add a variable for currency in APP007.SQR so that the SQR retrieves the currency value and writes it to the data extract file.

Here's what the data extract file looks like before the change:

```
systemdate, Line1, . . . , Offer_Amt

"May 15, 1993", "Mr. John Matson" . . . , "40,000"
```

Here's what it looks like after the change:

```
systemdate, Line1, . . . , Offer_Amt, Currency

"May 15, 1993", "Mr. John Matson" . . . , "40,000", "US Dollars"
```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to send out form letters listing interview schedules for applicants. Or for administering training, you might want to create a form letter notifying students they are on the waiting list for a course session.

To create a new form letter:

1. Create a new letter code in the Standard Letter Table.
2. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.

For example, create a form letter for interview schedules (INT) by adapting the offer letter template. In the directory \PS\WINWORD, open LTROF1.DOC. Modify the text as needed and add any new field codes that you want to use in the letter. Save the new template under a different name, LTRINT.DOC.

3. Edit the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.

For example, to create a new form letter for interview schedules, you create new procedures in APP007.SQR to extract values from all the fields and create a separate data extract file to store interview schedule letter information.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see Introduction to PeopleSoft Reporting.

Adding Letter Code Fields to Pages

We deliver PeopleSoft Human Resources with Letter Code fields in several pages in HR Recruit, HR Training, and HR Workforce Administration, Labor Relations.

You can add the Letter Code field to any other pages (and their underlying tables) in PeopleSoft Human Resources. For example, if you routinely send letters to employees, notifying them of career planning sessions, you can add the Letter Code field to one of the pages from the Plan Careers menu.

Note. To make this change, you should be familiar with PeopleSoft Application Designer; Microsoft Word for Windows field codes, macros, and data statements and the SQRs that are used to extract data values from your PeopleSoft Human Resources database.

When you add the Letter Code field to another page and its underlying table or tables in the system, also create:

- A letter code that represents the particular module.
- A form letter template with the appropriate text, field codes, and data statements.
- An SQR that extracts data from the correct tables in PeopleSoft Human Resources and creates new data extract files.
- A job containing the SQR, WinWord process WORDINIT, and the Application Engine PSMERGE.

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting, “PeopleSoft Reporting Tools, “ Structured Query Reports (SQRs)

PeopleTools PeopleBook: Process Scheduler

Microsoft Word for Windows User's Guide

Setting Up Standard Letter Codes

This section explains how to set up codes for your standard letters and print a report of the codes that you have set up in the Standard Letter Table.

Note. You only need to set up letter codes for PeopleSoft Human Resources form letters.

Pages Used to Set Up and Report Standard Letter Codes

Page Name	Object Name	Navigation	Usage
Standard Letter Table	STANDARD_LTR_TABLE	Set Up HRMS, Common Definitions, Standard Letter Table, Standard Letter Table	Define your letter codes.
Standard Letter Report - Run Control	PRCSRUNCNTL	Set Up HRMS, Common Definitions, Standard Letter Report	Run the Standard Letter Table report (PER711) that lists the codes in your Standard Letter table.

Setting Up Standard Letter Codes

Access the Standard Letter Table page.

Standard Letter Table

Letter Code: CAN

***Set Letter Code:** Training Letters

***Description:** Training Cancellation Letter

Short Description: Cancelled

Standard Letter Table page

PeopleSoft delivers letter codes for the sample letters that are supplied as standard. You can add your own codes to generate other form letters.

Set Letter Code

Select a code from the available options. This code is used to group similar letter codes, making it easy for you to find the code that you want. Options are:

Customer Letters: Select this option if you have created letters for your organization that don't fit into any other category.

Employee Review Letters: For employee review letters.

Manage Labor Relations: For labor relations letters. Standard disciplinary and grievance letters.

Recruitment Letters: For recruitment letters and job postings.

Training Letters: For training letters.

The system uses the Set Letter Code field to determine which letter codes to list for the Letter Code fields. For example, on a recruitment page, the list of options includes only letter codes with a set letter code of *Recruitment Letters*.

Generating Form Letters for HRMS Applications

Before you generate any form letters or modify any of the sample form letters that are delivered with PeopleSoft HRMS, you need to understand how the process works.

Following is an overview of the process for generating form letters for PeopleSoft HRMS:

Note. These instructions are for creating form letters using templates for PeopleSoft HRMS applications other than PeopleSoft Human Resources. If you are creating form letters for PeopleSoft Human Resources, see *Generating Human Resources Form Letters*.

1. Use the report writer to run SQRs.

The SQRs search your PeopleSoft HRMS database, retrieve data, and create data extract files containing one line of data for each letter.

2. Use Word for Windows to run the macros that merge the data extract files into form letter templates, one for each type of letter.

To generate form letters using PeopleSoft Process Scheduler, PeopleSoft delivers two files (STDLTR.DOT and STDLTR.95 located in the \PS\WINWORD directory on your application CD) containing the Word macros. You must use the file that is appropriate for your system.

- The macros in STDLTR.DOT are for use with Word 97 (in Microsoft Office 97) and are written in Visual Basic.
- The macros in STDLTR.95 are for use with Word 7.0 (used in Microsoft Windows 95) and are written in Word Basic.

If you need to use STDLTR.95, copy it to your system and rename it STDLTR.DOT.

3. Print the letters using Word for Windows.

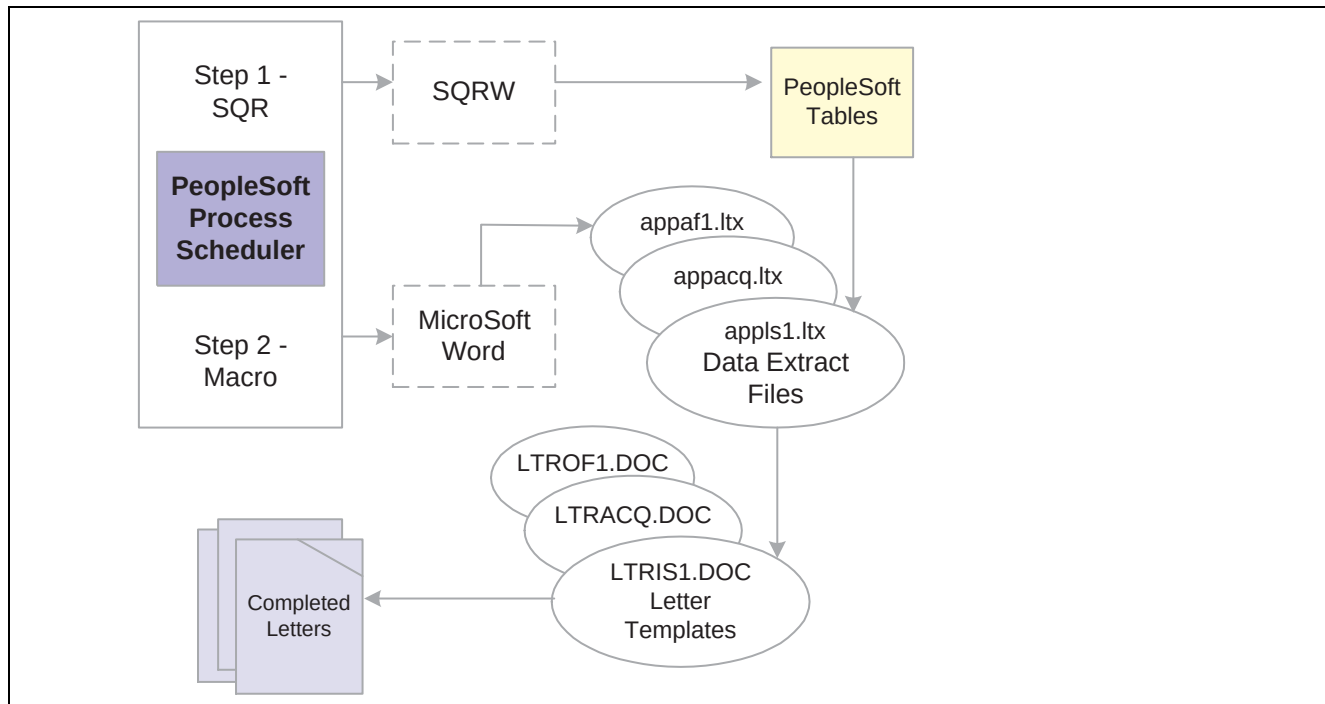
The system creates the form letters in a temporary directory on the application server, putting all letters of the same type in one file.

The distributed architecture of your PeopleSoft HRMS system means that your application server can be located far from your machine, so the system doesn't print letters to a default printer. Instead, you select where you want to print the letters using standard Word for Windows print options.

Generating Form Letters for PeopleSoft HRMS With PeopleSoft Process Scheduler

PeopleSoft Process Scheduler uses Word for Windows to run the macros that merge the data extract files into form letter templates and prints the letters. You can run a job that performs each step in sequence or you can manually run each process in turn. If you manually run each process, you must perform the steps sequentially (first the SQR and then its corresponding macro) because PeopleSoft Process Scheduler can't call up the report writer and the word processor simultaneously. Also, the data extract file that is created by the SQR must exist before the Word macro starts.

The following diagram illustrates generating form letters using PeopleSoft Process Scheduler:



Need Caption

SQR PAWRL01:

- Scans the personal data record of each employee.
- Retrieves the information from the record.
- Creates data extract files PASTDEXT.DAT in the TEMP directory that is defined in the macro.

The macro PAWRL01:

- Opens the form letter templates that correspond to the data extract files.
- Merges the appropriate extract file data into the template ROLLOVER.DOC.
- Inserts the data from PASTDEXT.DAT into the template field codes.

Naming Conventions in Form Letter Files

Word for Windows assigns the extension .DOC to all documents. No other naming convention is required for these type of letters.

Preparing to Print Form Letters

Before you can print form letters, you need to modify the macros supplied by PeopleSoft to suit your environment and set up your process scheduler configuration file. Depending on your configuration, you may need to make the following changes to the standard Word for Windows macros that are supplied by PeopleSoft:

- Default path to the EMPTY.DOC file that contains all the macros.
- Location of the letters produced.

The macros create letters in the directory C:\TEMP on your application server. We recommend that you edit the macros to change the location of the letters so that when you print them from Word for Windows, you print them to your local printers.

To set up your system to print form letters:

1. Set up a shared directory on your machine for the letters.

This enables the application server to add the letters to the directory. For example, if you're the training administrator, you may share the C:\TEMP directory on your machine as TRNTEMP.

For the multilingual letters, set up subdirectories for each language that you run the letters in. For example, if you run letters with the Language field set to English, you create the directory C:\TEMP\ENG. See your system administrator if you don't know how to set up shared directories.

2. Update the macros with the location of your EMPTY.doc file and the location of your shared directory.

In that macro, you replace the following line:

```
WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDTEXT.DAT", "C:\HR800=>
\WINWORD", =>
"ROLLOVER.DOC", ""
```

With this line:

```
WordBasic.Call "FuncLib.MergeReport", "C:\TEMP", "PASTDTEXT.DAT", "C:\<path>=>
\WINWORD", =>
"ROLLOVER.DOC", "\\<machine_name>\TRNTEMP"
```

Where:

<path> is the path to the directory that contains empty.doc

<machine_name> is the machine name that is assigned to your computer.

3. Define the WINWORD variable in your Process Scheduler Configuration file.

WINWORD defines the location of the Word for Windows executable file that the process scheduler runs to produce the form letters. For example, if Word for Windows is run on the application server, you might have this line in the process scheduler configuration file:

```
WINWORD=C:\APPS\OFFICE97\OFFICE
```

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Adapting Form Letters

This section discusses how to adapt form letters, as follows:

- Modify the Word for Windows macros for the sample letters; for example, change the PATH statements to match your environment.
- Change the text in sample form letters so that it suits your organizational needs; for example, change the author name and title.
- Extract values from other fields in PeopleSoft Human Resources and insert them into the form letter templates; for example, add a currency code field to the form letter.
- Create new form letters for different purposes.

Modifying the Word Macros for the Sample Letters

You specify several environment variables in each Word for Windows macro so that it can find the Word templates and data extract files during the form letter process. For example, your network or workstation configuration may have some of the files in different locations than those specified in the macros, so you need to modify the PATH to reflect the correct locations.

Before you edit the existing macros (or create new ones), we recommend that you print copies of the Word for Windows documents and macros and the report writer SQRs, and study them carefully.

Note. To make this change, you should be familiar with Microsoft Word for Windows templates and macros, and your report writer.

All the macros are attached to a file in the \PS\WINWORD directory. (Your path may differ, depending on your installation, but you can always find the file in a WINWORD subdirectory.) They are attached to an empty Word for Windows file called EMPTY.DOC.

To modify a macro:

1. In Microsoft Word, open the file EMPTY.DOC.
2. Select Tools, Macro.
3. In the Macros in field, select Stdltr (template).
4. Highlight the macro to modify and click Edit.

Modifying the Text in Sample Letter Templates

The form letter templates that are delivered with PeopleSoft HRMS contain sample text for different types of tasks, which you can change to suit your needs. For example, you'll probably want to change the sender name in the letters to the employees in your organization who are responsible for administering the tasks. If you need to modify only the text, without changing any fields that are used or pages and tables that are referenced in PeopleSoft Human Resources, follow the procedure below.

To modify the text in a form letter:

1. Find the Word letter template to update.

Templates are listed in Naming Conventions for Form Letter Files and are located in the directory \PS\WINWORD.

2. In Microsoft Word for Windows, open the document to modify.

If you see “ ” in the document, select Tools, Options; then select the Field codes check box.

3. Make changes to the text as you would in any other document, and save the file.

Warning! Don't overwrite the field codes (enclosed in curly brackets). They are the placeholders for the values that extracted from PeopleSoft Human Resources.

Adding Fields to Sample Letters

In addition to updating the text of a sample letter, you can include other types of data from PeopleSoft HRMS.

Note. To make this change, you should be familiar with Microsoft Word for Windows fields and the report writer used to extract data values from your PeopleSoft Human Resources database.

To use additional fields in form letters:

1. Add field codes to the form letter templates for any new data types that you want to include.
2. Modify the SQR that extracts data from PeopleSoft Human Resources so that it retrieves values from all the fields that you want to use and writes them to the appropriate data extract files.

For example, to include currencies in the notification letter ROLLOVER.DOC, add a Currency field code to the form letter template. Also add a variable for currency in PASTDEXT.SQR so that the SQR retrieves the currency value and writes it to the data extract file.

Here's what the data extract file looks like before the change:

```
LANG,NAME,PLAN,ADDR1,ADDR2,ADDR3,NATIONAL_ID,CURDATE
USA", "Mr. John Matson","BEN01", . . . , "May 15, 1993"
```

Here's what it looks like after the change:

```
LANG,NAME,PLAN,ADDR1,ADDR2,ADDR3,NATIONAL_ID,CURDATE,Currency
USA", "Mr. John Matson","BEN01", . . . , "May 15, 1993","US Dollars"
```

Creating New Form Letters

You can create form letters for different purposes. For example, you might want to send out form letters to be signed by employees about their benefit plans .

To create a new form letter:

1. Create a Word letter template, including the appropriate text, field codes, and data statement reference.

You might find it easier to adapt an existing form letter template than to create a new one. Look through the form letter templates to see if there's one that needs only minor modifications to serve as a new form letter template.

2. Create the SQR that selects and extracts data from other PeopleSoft Human Resources tables and stores it in a separate data extract file.
3. Create a new macro that is able to read the extracted data and merge them with the Word letter template.
You might find it easier to copy an existing macro and adapt it.

Note. To link your new letter to PeopleSoft Process Scheduler, ask your human resources project leader or see Introduction to PeopleSoft Reporting.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Microsoft Word for Windows User's Guide

Sample Form Letters

In this section are three sample letters: a confirmation of enrollment letter used in Training, resume acknowledgment letter used in Recruiting, and a Direct Rollover Election Form that the employee must complete for pension.

Training Letter Sample

August 10, 2001

Barry Robert Campbell 4928 Wildwood Place Toronto, ON

Dear Barry:

I am pleased to confirm your enrollment in training course K018 titled PeopleTools 1 beginning 09/11/2000 and ending 09/15/2000. Course hours are 9:00 AM to 6:00 PM daily, unless otherwise advised. The course will commence at: Corporation Headquarters Bldg 2000 Floor 2 Room Training Room 2

500 George Washington Pkway

New York, NY

Directions:

From the Airport, take the shuttle bus to George Washington Parkway.

Sincerely,

Barbara Smith Training Coordinator

Recruitment Letter Sample

November 1, 2001

Ms. Judith Cologne

698 Donegall Drive Apt. 301

Toronto, ON M5P 3K8

Dear Ms. Cologne:

Thank you for sending your resume to PeopleSoft. We are now reviewing your qualifications and background against current openings. We will contact you for an interview if we identify an appropriate position for you. It is our policy to keep all applications in an active file for one year. If you do not hear from us, we will place your application in our file for future consideration.

We thank you for your interest in PeopleSoft and wish you well in your pursuit of new goals.

Sincerely,

Barbara Smith

Employment Coordinator

Pension Administration Sample

DIRECT ROLLOVER ELECTION FORM «PLAN» (Sample Form)

«NAME»

Date: «CURDATE»

«ADDR1»

«ADDR2»

Social Security No: «NATIONAL_ID»

«ADDR3»

I. Distribution Information:

Amount of distribution: _____ (If distribution is for the entire account balance enter "account balance")

II. Information About Plan or IRA to Receive Direct Rollover:

Name of Plan: _____

Name of Plan Administrator: _____

Address of Plan: _____

OR

Name of Plan Trustee or Custodian of IRA : _____

Address of Plan Trustee or Custodian: _____

Account Number of IRA: _____

Check which Applies to the Plan to Receive Your Rollover:

___ The plan is a qualified plan under Internal Revenue Code Section 401(a).

___ The plan accepts direct rollover contributions.

___ The plan accepts noncash contributions (optional).

I hereby certify that the information I have entered on this form is true, correct, and complete.

_____ Date _____

Signature of Participant

CHAPTER 28

Working With Self-Service Transactions

This chapter provides an overview of self-service transactions and describes how to:

- Configure self-service transactions.
- Set up direct report access for managers.
- Use workflow with self-service transactions.

Understanding Self-Service Transactions

Self-service transactions are designed to be extensions of a core PeopleSoft product. They enable employees to update their personal information or to perform some basic task required by their job.

When the self-service transactions were designed there were two things to consider when an employee entered new data:

- Do you want that new information to update the HR database or do you want a system administrator to update the database?
- Do you want the transaction to go through an approval process? This means that once the new information is submitted, a notification is sent to someone who has to look at this information and approve it before the database can be updated.

Configuring Self-Service Transactions

This section discusses setting rules for self-service transactions and how to:

- Set up approvals and database updates.
- Set up administrator notification rules.
- Set up component interface rules.
- Review transaction activity.

Understanding Rules for Self-Service Transactions

You can set rules that define whether the transaction:

- Goes through an approval process.

- Updates the database or sends a notice to the administrator to complete the transaction manually.
- Who to notify when problems occur during the processing of the transaction or when a transaction successfully completes.

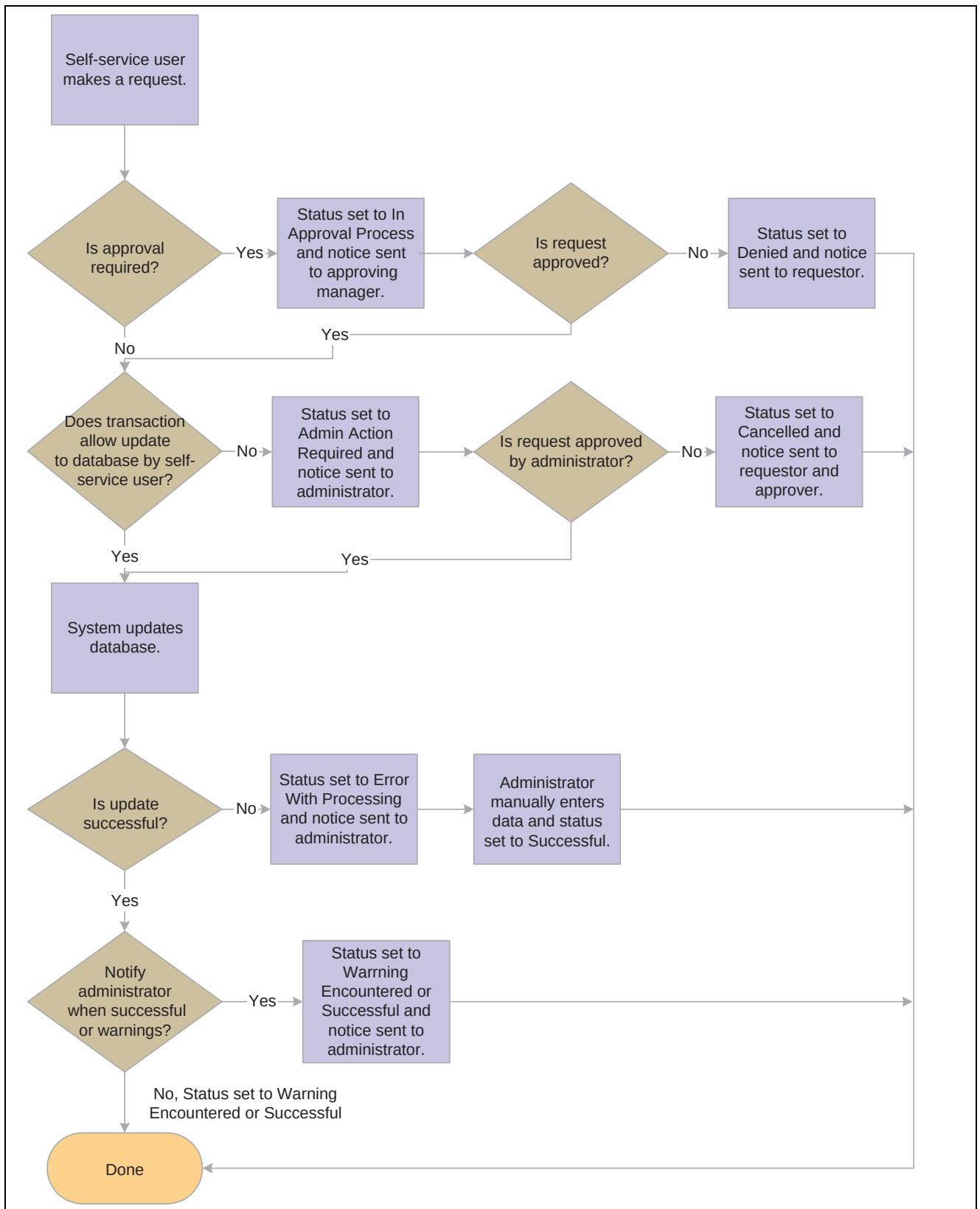
Which Transactions Can Be Configured

The following self-service transactions were designed so users could define how processing for each self-service transaction would behave:

- Performance Document
- Address Change
- Change Full/Part Time Status
- Change Location
- Marital Status
- Name Change
- Promotion
- Reporting Change
- Retire Employee
- Salary Change
- Terminate Employee
- Training Enrollment
- Training Enrollment by Manager
- Transfer

Overview of the Self-Service Processing

The following diagram maps out the process a self-service transaction takes when the transactions is set up to follow the configuration rules.



Process flow for transactions using Process Configuration

Note. If a user ID is not tied to the role entered in the Route to Role field on the Approval Rule Set page, an error notification is sent to the administrator and the error can be viewed using the Self-Service Inquiry page. If an alternate user is entered on the General Profile Information page, make sure the User ID entered has permission to access the necessary pages.

Exceptions to the Rules

Some transactions update the employee's job data. These self-service rules cannot override information controlled by Position Management.

If Position Management Is Set To	And Employee's Job Is	Then Auto-Update of Database
None	Not Applicable	Is allowed.
Partial	In a position	Not allowed. Exception to this rule is when a manager is requesting a reporting change for an employee. If the employee is in a position and an ID was entered in the Supervisor ID field automatic update is allowed.
Full	In a position	Not allowed. Exception to this rule is transferring and promoting an employee. This is because managers promote or transfer employees by selecting a new position number, not changing the existing one. So, automatic updates will insert the new position number and update all the related fields; position data is not touched.

Pages Used to Set Up Rules for Self Service Transactions

Page Name	Object Name	Navigation	Usage
Self Service Workflow Configuration	WF_CO_CONFIG	Set Up HRMS, Common Definitions, Self-Service, Workflow Configuration	Determines whether transaction should follow an approval process, update the database automatically, and identify who handles errors and manual updates to database.
Admin Notification	WF_HR_TRANS_NOT	Click the Notification Setup link on the Configuration Options page.	Defines if an administrator should receive email notification when automatic update was successful or there were warning messages issued during the update.
SS Component Interface Setup	SS_TRANS_CIDTL_SEC	Click the Component Interface Setup link on the Configuration Options page.	Defines the name of the component interface used by the transaction and location of error and warning messages.
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry	Administrators review activity for self-service transactions.

Setting Up Approvals and Database Updates

Access the Configuration Options page.

Self Service Workflow Configurations

Configuration Options					
Description	Approval Process?	Allow DB Update	*Administrator Role	Notification Setup	Component Interface Setup
Performance Document	☒		Personnel Administrator	Not Applicable	Not Applicable
Address Change	☐	☒	Personnel Administrator	Notification Setup	Component Interface Setup
Change Full/PT Status	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Change Location	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Marital Status	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Name Change	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Promotion	☒	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Reporting Change	☒	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Retire Employee	☐	☒	Personnel Administrator	Notification Setup	Component Interface Setup
Salary Change	☒	☐	Defined in Approval Ruleset Object	Notification Setup	Component Interface Setup
Terminate Employee	☐	☐	Personnel Administrator	Notification Setup	Component Interface Setup
Training Enrollment	☐	☐	Defined in Approval Ruleset Object	Notification Setup	Component Interface Setup
Training Enrollment by Manager	☒	☒	Defined in Approval Ruleset Object	Notification Setup	Component Interface Setup
Transfer	☒	☐	Personnel Administrator	Notification Setup	Component Interface Setup

Self Service Workflow Configurations page

Description

Lists the self-service transaction delivered with system that is designed to work with the Process Configuration Process.

Approval Process?

This check box is only available to those transactions designed to use an approval process. If selected, the system will follow the approval process for the transaction. If not selected, the system will bypass any approval processing.

Allow DB Update

If selected, this check box allows the transaction to update the database. If not selected, an administrator will be notified of the change and will update the database using the Workflow Inquiry page.

Administrator Role

Identifies the role of the person who is responsible for reviewing the results of the transaction if errors occur.

If Notify on Success or Notify on Warnings is selected on the Admin Notification Setup page, this role receives notifications when processing is successful or warnings are encountered.

Note. If Administrator Role is *Defined in Approval Ruleset Object*, then the role is based on the access type set in the Direct Reports Setup page and PeopleCode is used to determine to whom to route the approval notification.

Notification Setup

Click this link to display the Admin Notification Setup page.

Component Interface Setup

Click this link to display the SS Component Interface Setup page.

See Also

PeopleSoft PeopleTools, Security, Setting Up User Profiles

Setting Up Administrator Notification Rules

Access the Admin Notification Setup page.

Admin Notification Setup

Address Change

*Component	Notify on Success	Notify on Warnings	Business Process Name	Activity Name	Event Name
HR_HOME_MAILING	☐	☐	HR_SS_WORK_EVENTS	HR_SS_CI_ADMIN_ORIG	Address Change CI
WF_HOME_MAIL_CHG	☐	☐	HR_SS_WORK_EVENTS	HR_SS_CI_ADMIN_ADMN	Address Change CI

Admin Notification Setup page

Component	The name of the transaction.
Notify on Success	Applicable only if Allow DB Update is selected on the Configuration Options page. Select to have the role selected on the Configuration Options page receive an email when automatic updates are successful.
Notify on Warnings	Select to have the role selected on the Configuration Options page receive an email when warning messages are generated during a successful HR database update.
Business Process Name, Activity Name, and Event Name	This is predefined system data that can be changed if you want to use a different component interface.

Setting Up Component Interface Rules

Access the SS Component Interface page.

SS Component Interface Setup

Sequence Number	*Component Interface Name	*BC Item Logical Name	*Table Name	*Exception Table
1	CI_PERSONAL_DATA	COLL_ADDRESSES	ADDRESSES	WF_PER_ERR_WRN

SS Component Interface Setup page

Note. You do not need to modify this page unless you use custom-built component interfaces or exception tables. This is predefined system data that can be changed if you want to use a different component interface.

Reviewing Transaction Activity

Access the Workflow Inquiry page.

Required Search Fields

Transaction Type or Employee ID Number is required.

EmpID:

Transaction Name: 

Optional Search Fields

Date: 

Narrow your search results by choosing one or more of the following statuses:

- ☒ Error with Processing
- ☒ In Approval Process
- ☒ Administrator Action Required
- ☒ Warnings Encountered
- ☒ Successful Updates
- ☒ Denied/Cancelled

Workflow Inquiry page (1 of 2)

Salary Change Requests							
Transaction Data1		Update Information					
	Status	EmpID	Self Service Group ID	Self Service Transaction ID	Name	Go to Job	Update Status
1	Success	HXEC01	1	1	MacGregor,Kelsey	Go to Job	Update Status
2	Success	HXEC02	1	2	MacGregor,George	Go to Job	Update Status
3	Success	HXEC03	1	3	Weatherford,Patsy	Go to Job	Update Status
4	Success	HXEC04	1	4	Weatherford,Bob	Go to Job	Update Status
5	Success	HXEC05	1	5	Presley,Bob	Go to Job	Update Status
6	Success	HXEC06	1	6	Preston,Edward	Go to Job	Update Status
7	Success	HXEC07	1	7	Rice,Bob	Go to Job	Update Status
8	Success	HXEC08	1	8	Rice,Anne	Go to Job	Update Status
9	Success	HXEC09	1	9	Rice,Susan	Go to Job	Update Status
10	Denied	HXEC10	1	10	Rice,Ben	Go to Job	Update Status
11	Success	HXEC11	1	11	Elliott,Sam	Go to Job	Update Status
12	Success	HXEC12	1	12	Elliott,Justine	Go to Job	Update Status
13	Success	HXEC13	1	13	Darrin,Larry	Go to Job	Update Status
14	Success	HXEC14	1	14	Darrin,Michelle	Go to Job	Update Status
15	Success	HXEC04	2	1	Weatherford,Bob	Go to Job	Update Status
16	Denied	HXEC05	2	2	Presley,Bob	Go to Job	Update Status
17	Denied	HXEC14	3	1	Darrin,Michelle	Go to Job	Update Status
18	Success	HXEC04	4	1	Weatherford,Bob	Go to Job	Update Status

Workflow Inquiry page (2 of 2)

Required Search Fields

To see the activity for a specific employee enter the employee ID in the EmpID field. Make sure to tab out of the field.

To see the activity for <name of transaction> select <object name for transaction> in the Transaction Name field. Make sure to tab out of the field.

	To select activity with a specific status, select the check box next to the name of the status. You can select one or more statuses.
Optional Search Field	To see the activity for transaction that occurred on a specific date, enter the date in the Date field.
Search	Click this link to find transaction that match the search criteria. Results are displayed below the Search button.
Search Results	Information about the transaction displays. Click the various tabs to display information relevant to the transaction. Click the Errors or Warnings links to display error and warning messages. Click the Go To link to display the component page relevant to the transaction. Click the Update Status link to update the status.

Setting Up Access to Direct Reports Data

The system determines who can access the manager self-service components and data by determining the answers to these questions:

- Is this user a manager?
- Who reports to this manager?

You determine a user's access to some or all of the manager self-service components when you define their component access on the Permission List page. In the Manager Self Service Options component, you specify whose data a user can see for a particular manager self-service transaction.

The system determines what kind of reporting relationship exists between managers and their employees. Reporting relationships are determined on two pages: the Work Location page and the Department Profile page. On the Work Location page, you indicate who an employee's manager is. On the Department Profile page, you indicate who manages a department and the employees who report to that department.

Note. This section does not apply to the manager role in PeopleSoft eRecruit Manager Desktop.

See [Chapter 11, "Setting Up Organization Foundation Tables," Setting Up Primary Permission List Preferences](#), page 204.

See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Hiring Your Workforce," Entering Employee Job Location and Position Information.

See [Chapter 11, "Setting Up Organization Foundation Tables," Defining Basic Information About a Department](#), page 195.

Pages Used to Set Up Direct Reports

Page Name	Object Name	Navigation	Usage
Manager Self Service Options - Target Information	SS_LINK_TBL	Set Up HRMS, Common Definitions, Self Service, Direct Reports Setup	Set up employee data access for the Manager self-service option.
Manager Self Service Options – Instructional Text	SS_LINK_TBL2	Set Up HRMS, Common Definitions, Self Service, Direct Reports Setup, Instructional Text	Add instructional messages to the Select Employee page for this transaction component.service.

Setting Up Direct Reports

Access the Target Information page.

Note. To determine technical names of the system objects, use PeopleSoft Application Designer.

The screenshot shows the 'Target Information' tab of a configuration page. The fields are as follows:

- Component Name:** HR_SALCHANGE_LNK
- Market:** GBL
- Menu Name:** ROLE_MANAGER
- Menu Bar Name:** USE
- Item Name:** HR_SALCHANGE_ORG
- Page Name:** HR_SALCHANGE_MGR
- Access Mode:** Add
- Record (Table) Name:** (empty)
- Access Type:** By Department Manager Id
- ☐ **Update Own Info**

Target Information page

- Component Name** Enter the component name as defined on the menu in PeopleSoft Application Designer.
- The component name is the name of the Select Employee page that the system displays when the user selects a Manager self-service transaction. It isn't the name of the transaction component.
- Menu Name** Select *ROLE_MANAGER*. All Manager self-service transactions are delivered on this menu. To grant manager access to components on other menus, select the name of the menu that the component is on.
- Menu Bar Name** Select the name of the menu bar that the transaction component is under.
- Item Name** Enter the component's item name. The item name is the system name of the transaction component, not the component name of the Select Employee page.

The transaction component contains pages that the user uses to view or manipulate employee data.

Page Name

Enter the object name of the transaction component's page. The object name for each Manager self-service transaction is listed in the introduction table of the page discussion.

If a transaction component has more than one page, enter the name of the transaction page that the system displays first (usually the first page in the component) when a user selects an employee name.

Access Mode

Select which action the user performs in the transaction. Options are *Add*, *Update/Display*, *Update/Display All*, and *Correction*.

Record (Table) Name

Enter the object name of the record that makes up the page of the transaction component.

Access Type

This field defines the reporting relationship used by the Select Employee page for this transaction component and determines which method is used to identify who approves the transaction. Available options are:

By Department Manager ID: Defines the reporting relationship based on information in the Manager ID field on the Department Profile page. For users who are department managers, the system displays a list of the employees who are in the user's department.

By Dept Security Tree: Determines employee data access using information from the security tree. The system presents the user with a list of employees whose data the user has access to, based on the security tree.

By Group ID: Determines employee data access using the Group ID set up in the group build feature.

By Part Posn Mgmt Dept Mgr ID: Defines the reporting relationship by the Reports To field on the Work Location page and the information in the Manager ID field on the Department Profile page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Department Manager ID.

By Part Posn Mgmt Supervisor: Defines the reporting relationship by both the Reports To and the Supervisor ID fields on the Work Location page. This is designed for the organizations that use Partial Position Management. The system searches for reporting relationship based on Report To first, and then for Supervisor ID.

By Reports To Position: Defines the reporting relationship based on information in the Reports To field on the Work Location page. The system presents the user with a list of employees whose job record indicates that they report to that user's position.

By Supervisor ID: Defines the reporting relationship based on information in the Supervisor ID field on the Work Location page. The system presents the user with a list of employees whose job records indicate that they are supervised by the user.

Update Own Info (update own information)

Not applicable to self service. Select to allow managers to update their own information in this transaction component.

See Also

PeopleTools PeopleBook: Application Designer

Chapter 9, “Administering PeopleSoft Security,” Creating and Modifying Security Trees, page 94

Setting Up Transaction Instructional Messages

Access the Instructional Text page.

The screenshot shows the 'Instructional Text' page for the component 'HR_SALCHANGE_LNK' in the 'GBL' market. The page is divided into two tabs: 'Target Information' and 'Instructional Text'. The 'Instructional Text' tab is selected. Below the tabs, there are fields for 'Component Name' (HR_SALCHANGE_LNK) and 'Market' (GBL). A section titled 'Direct Reports - Page Instructional Text' contains several fields: 'Title Message Set' (1120), 'Title Message Number' (1012), 'Message Text' (Salary Change), 'Instructions Message Set' (1120), and 'Instructions Message Number' (1012). There is also an 'Explain' field with a text area containing the instruction: 'Begin your Salary Change Request by entering the date on which the salary change will take effect and clicking 'Go'. Then, select one or more employees for whom you will be requesting a change and click 'Continue'.'

Instructional Text page

Direct Reports - Page Instructional Text

Title Message Set

Enter the title message set of the transaction instructions title that the system displays on this component's Select Employees page.

Title Message Number

Enter the title message number of the transaction instruction title that the system displays on this component's Select Employees page.

Message Text

Displays the text of the transaction instruction title that is associated with the Title Message Number. The system displays this text on this component's Select Employees page.

Instructions Message Set

Enter the number of the instructions message set for the instruction message that the system displays on this component's Select Employees page.

Instructions Message Number

Enter the message number of the instruction message that the system displays on this component's Select Employees page.

Explain

Displays the text of the instruction message that is associated with the Instructions Message Number. The system displays this text on this component's Select Employees page.

Tells the user how to select the employees whose data they want to view or manipulate.

Using Workflow With Self-Service Transactions

This section discusses how to set up the system default and user notification method for workflow messages.

See Also

PeopleTools Workflow PeopleBook

Pages Used to Activate Workflow

Page Name	Object Name	Navigation	Usage
Worklist System Defaults	WF_SYS_DEFAULTS	PeopleTools, Workflow, Defaults & Messages, Set Workflow Defaults	Set default parameters for workflow messages.
Workflow User Preferences	HR_SS_WF_EE_PREF	Employee Self Service, Workflow User Preferences	Set up a user's notification method for workflow messages.
Workflow Transaction Categories	EO_TRAN_CATS	Set Up HRMS, Common Definitions, Self Service, Transaction Categories	Defines the category for self-service transactions. Generally, all self-service transactions are assigned to HR_TRANSACTIONS. This data is supplied by PeopleSoft and it is recommended that you not change this information.
Workflow Transactions	EO_TRANSACTIONS	Set Up HRMS, Common Definitions, Self Service, Workflow Transactions	Assign the self-service transaction to a category set up in the Workflow Transaction Categories page. This data is supplied by PeopleSoft and it is recommended that you not change this information.
System Workflow Rules	EO_SYS_WF_RULES	Set Up HRMS, Common Definitions, Self Service, Workflow Status	For every SetID where you plan to use workflow, set the rules for workflow notification.
Workflow Status	HR_WF_STATUS	Set Up HRMS, Common Definitions, Self Service, Workflow Status	For each self-service transaction, specify what workflow is triggered. Changes to the approval path can be made, but is not recommended.

Activating Workflow Message Defaults

Access the Worklist System Defaults page.

Worklist System Defaults

System Default User

***User ID:**

System Wide Route Processing

☒ **Worklists Active**
☒ **Email Active**
☒ **HR Installed**

Worklist System Defaults page

Make sure the Worklist Active, Email Active, and HR Installed check boxes are selected.

Setting Employee Notification Preferences

Access the Workflow User Preferences page.

Workflow User Preferences

Betty Locherty

User Preferences

Transaction Category: HR_TRANSACTIONS

***Method:**

Workflow User Preferences page

Select the method of workflow notifications.

Defining Rules for Workflow Notifications

Access the System Workflow Rules page.

System Workflow Rules

SetID: Description: CORP1 CORP1

Category Workflow Rules					
*Transaction Category	*Workflow Rule	Notify User - Entry	Notify - All	Notify - Final Disposition	
HR_TRANSACTIONS	Both	☒	☒	☒	+ -

System Workflow Rules page

For different rules to exist for different business units specify these rules at the SetID level.

Note. You must specify this information when you implement PeopleSoft HRMS.

Transaction Category	Select a transaction category.
Workflow Rule	Define how the system notifies users when they're required to perform a function. Values include: <i>Email:</i> Notify the user via email. <i>Worklist:</i> Notify the user by placing an entry on the user's worklist. <i>Both:</i> Notify the user by both email and worklist. <i>None:</i> No notification. <i>User:</i> Enable the user to define a preference. The user specifies preferences on the Workflow User Preferences page.
Notify User - Entry	Select if users are to receive confirmation when initiating transactions.
Notify All	Select if users are to be notified each time someone processes one of their transactions.
Notify - Final disposition	Select if users are to be notified when the final disposition has been made for the request.

See Also

Chapter 26, "Using PeopleSoft Workflow," page 453

CHAPTER 29

PeopleSoft Directory Interface for HRMS

This chapter provides an overview of PeopleSoft Directory Interface as it is used with PeopleSoft HRMS.

PeopleSoft Directory Interface enables you to share data that's maintained in your PeopleSoft HRMS database with your Lightweight Directory Access Protocol (LDAP) directory, simplifying directory setup and maintenance.

Loading Data for HRMS

Once you have set up PeopleSoft Directory Interface you can load the data into the directory using the Directory Load process.

The Directory Load process sometimes experiences performance issues when loading a large volume of employee data. To avoid these issues, use the DSMAPINPUT FullSync process to load only employees and their job data instead of the Directory Load process.

Note. Both the DSMAPINPUT FullSync and the Directory Load processes overwrite any existing data in the directory. Use the DSMAPINPUT FullSync process for employee and job data only. If you are loading location and department entries as well, use the Directory Load process.

See Also

PeopleSoft Enterprise Components PeopleBook: PeopleSoft Directory Interface

Loading the Directory Using the DSMAPINPUT FullSync Process

Follow the steps below to load the directory using the DSMAPINPUT FullSync process.

Clean the Temporary Tables

Run the Clean Temp Tables (DSMAPINPUT) process from the Directory Load page.

1. Access the Directory Load page (Enterprise Components, Directory Interface, Load Directory).
2. Specify the appropriate map name and click Run.
3. Select the DS_CLEANTEMP process from the list and click OK.

Note. Do *not* run the Directory Load (EO_DS_AUDIT) process at this time.

Run the Full Data Publish for DSMAPINPUT_FullSync

The DSMAPINPUT message combines information from an employee's job and personal data into one message. The DSMAPINPUT_FullSync message is based on the DSMAPINPUT message structure and is defined within the DSMANCNL message channel. The Full Data Publish utility uses the DSMAPINPUT_FullSync message and loads multiple streams of employee ID data into the directory.

The utility processes the first active map it finds in the Directory Map table. If several maps contain DSMAPINPUT as the message name, ensure that you make only the one you want active *before* running this process.

1. Access the Full Data Publish page (Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish).
2. Select a Process Frequency of *Once*.
3. In the Message Name field, enter *DSMAPINPUT_FULLSYNC*.
4. Specify a Request ID and description, save your changes and click Run.
5. Choose the Table Replication Publish (EOP_PUBLISHT) process and click OK.

Review Transactions Using Message Monitor

Monitor the message queue to determine the status of the DSMAPINPUT_FULLSYNC message within the DSMANCNL message channel.

1. Access the Message Monitor page (PeopleTools, Integration Broker, Monitor, Monitor Message).
2. If the Started column has a number greater than zero, it means the message is still being processed. When the subscriptions are completed, the only column that will have a number greater than zero is the Done column.

Run the Entry Membership Process

After verifying on the Message Monitor page that all message subscriptions are complete, run the Entry Membership (DSMAPINPUT) process to load members into directory groups based on the Entry Membership Rules.

1. Access the Directory Load page (Enterprise Components, Directory Interface, Load Directory).
2. Specify the appropriate map and click Run.
3. Choose the DS_ENTRY process and click OK.

Note. Do *not* run the Clean Temp Tables or the Directory Load (EO_DS_AUDIT) process at this time.

Using PeopleSoft Directory Interface with HRMS

If you have licensed PeopleSoft Directory Interface for HRMS, PeopleSoft provides you with sample mappings and messages for HRMS. This section documents the sample mappings and delivered messages.

Note. If you have licensed the PeopleSoft Directory Interface for HRMS, the navigation paths to directory interface components are different than for the other applications. When using the PeopleSoft Directory Interface PeopleBook, use the HRMS navigation paths.

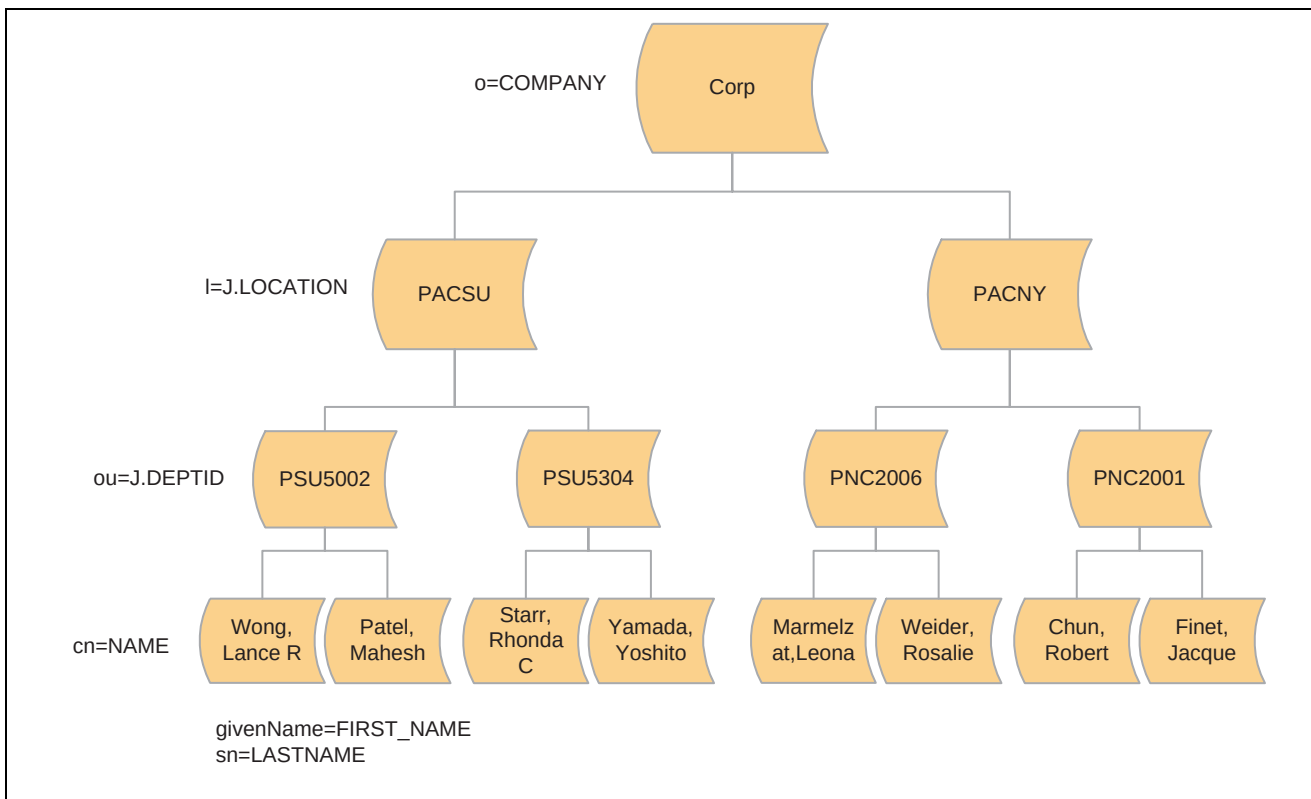
See Also

PeopleSoft Common Components: PeopleSoft Directory Interface

HRMS Sample Mappings

To use sample mappings that PeopleSoft delivers, establish directory IDs in the Directory Configuration component and add a directory ID to the mappings. The sample mappings use schema objects from a standard Novell eDirectory.

We developed the sample mappings assuming that you are using the tree structure illustrated below:



Sample Directory Interface tree

Delivered Messages

The following sections describe the delivered sample messages and PeopleCode functions that are related to your directory mappings.

Directory Interface Messages

PeopleSoft Directory Interface delivers the following sample messages for mapping PeopleSoft data to the directory.

Message Name	Directory Entry
DSLocation	Location Entry
DSDept_tbl	Department Entry
DSWorkforce_Sync	Job Entry
DSPerson_Basic_Sync	Person Entry

See *PeopleTools PeopleBook: Integration Tools*, “Application Messaging.”

Message Publish

The following example is Publish PeopleCode that is used in a component’s SavePostChange PeopleCode:

```

Local Message &MSG;

Local Rowset &COMPONENTROWSET;

&COMPONENTROWSET = GetLevel0();

&MSG = CreateMessage(MESSAGE.WANDA_PERSPUB);

&MSG.CopyRowsetDeltaOriginal(&COMPONENTROWSET);

&MSG.Publish();

```

Note. When publishing mapping data, use CopyRowsetDeltaOriginal, not CopyRowsetDelta.

Message Subscription

The following example shows subscription PeopleCode in a message:

```

Declare Function ProcessMappingMessage PeopleCode FUNCLIB_DS_PC.DSMAPMESSAGE Field⇒
Formula;

Local Message &msgIn;

/* Build the Mapping messages from the input message */

&msgIn = GetMessage();

ProcessMappingMessage(&msgIn, "DSMAPINPUT", True, "");

```

DSMAPINPUT Message

The DSMAPINPUT message, which corresponds to Directory Input, is a sample message that combines an employee’s job and personal data into one message. The DSWORKFORCE_SYNC message publishes an employee’s job information. The DSPERSON_BASIC_SYNC message publishes an employee’s personal information.

In the subscription of DSWROKFORCE_SYNC and DSPERSON_BASIC_SYNC, the message is passed as input into the BuildMappingMessage, which populates the DSMAPINPUT message with the employee's job and personal data. This enables you to map job and personal data for one message to one directory entry.

BuildMappingMessage Syntax

The BuildMappingMessage function populates a message with data that is stored in another message and with data from the local database. After populating the message from the two data sources, it calls the mapping function. When all the data required for directory mapping isn't in the original published message, BuildMappingMessage uses this function instead of directly calling the mapping function:

```
BuildMappingMessage (input message, output message, on-line flag, [, map name])
```

The function performs the following tasks:

- Copies data in the same record from the input message into the output message.
- Searches for empty records in the output message.
- Examines data in the message for key values for empty records.
- If it finds key values for empty records, populates empty records in the output message by retrieving its current rows in the database.
- If a map name is provided, calls the mapping function for the specified name. Otherwise, calls the mapping function for each map referencing the output message.

The BuildMappingMessage code is in the FUNCLIB_DS_PC derived record, DSMAPMESSAGE field, Field Formula event.

Parameters

<i>Name</i>	<i>Type</i>	<i>Description</i>
input message	Message	Pass the message containing the originally published data.
output message	String	Specify the name of the message to be created, populated, and passed to the mapping function.
online flag	Boolean	Set to <i>true</i> if the function is called after an online message publication. This flag isn't used by the BuildMappingMessage function, but it is passed to the mapping function.
map name	String	Specify the name of the map to be used if the function shouldn't call every map associated with the output message.

An example:

```
Local Message &MsgIn;  
  
BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```

CHAPTER 30

Understanding Enterprise Integration Points in HRMS

This chapter provides an overview of enterprise integration points in PeopleSoft HRMS and lists:

- HRMS EIPs that publish and subscribe.
- HRMS EIPs that publish only.
- References to documentation of enterprise integration points throughout PeopleSoft HRMS PeopleBooks.

Overview of Enterprise Integration in PeopleSoft HRMS

PeopleSoft uses enterprise integration points (EIP) to integrate HRMS applications with:

- Other applications within PeopleSoft HRMS.
- PeopleSoft applications outside of HRMS.
- Third-party applications.

EIPs employ a variety of technologies.

Activating Messages and Channels

With the exception of PERSON_BASIC_SYNC and WORKFORCE_SYNC messages, EIP messages available in PeopleSoft HRMS are delivered inactive. In PeopleTools Application Designer, activate the messages that your organization uses.

- Set the status of each selected message to *Active*.
- Set the status of the corresponding message channel to *Run*.

See Also

PeopleSoft Enterprise Integration PeopleBook

Understanding HRMS EIPs that Publish and Subscribe

This section discusses lists the local subscriptions delivered in HRMS and when you need to make them active. The system uses a local publish and subscribe EIP when the database that does the publish also has a subscription on the message that will trigger other processing within that database. There are several publish and subscribe messages in HRMS and for these processes to work properly you must set up the local node and gateway.

HRMS Local Subscribe EIPs

Read the information in the *Comments* column for each product or HR business process you are using (as listed in the *Product/Industry* column). If you need the capability provided by the EIP you must activate the message and subscription active in Application Designer using the Message Properties and the Message Subscription Properties pages.

See *PeopleTools PeopleBook*:

When using local subscription you only need to configure the local node but the application server must be running the publish and subscribe servers and the local gateway and node must be properly configured.

See *PeopleTools: Integration Broker*

Product /Industry	Message	Subscription	Comments
Education and Government	ACCOUNT_CHARTFIELD_FULLSYNC	AccountChartfieldFullSync	Imports data for GL Accounts from File or PeopleSoft Financials 7.5 for Education and Government. The message is used for both local and PSFT Financials Node.
Education and Government	BUDGET_POSITION_FULLSYNC	BudgetPositionFullSync	Imports data from File or PeopleSoft Financials 7.5 for Education and Government. The message is used for both local and PSFT Financials Node.

Product /Industry	Message	Subscription	Comments
Education and Government	BUS_UNIT_FS_FULLSYNC	BusUnitFSFullSync	Imports data for the FS Business Unit from File or PeopleSoft Financials 7.5 for Education and Government. The message is used for both local and PSFT Financials Node.
Education and Government	BUS_UNIT_GL_FULLSYNC	BusUnitGLFullSync	Imports data for the GL Business Unit from File or PeopleSoft Financials 7.5 for Education and Government. The message is used for both local and PSFT Financials Node.
Education and Government	DETAIL_CALENDAR_FULLSYNC	DetailCalendarFullSync	Imports data for accounting periods from File or PeopleSoft Financials 7.5 for Education and Government. Used for local and PSFT Financials node.
Education and Government	HR_ACCT_CD_LOAD	HR_ACCT_CD_LOAD	Imports data for the Account Code Table from PeopleSoft Financials for Education and Government releases 7.5 through 8 SP2.

Product /Industry	Message	Subscription	Comments
Education and Government	HR_CHARTFIELD_COMBO_SYNC	HRChartFldComboSync	Imports data for HRMS Speedtypes from File or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
Education and Government	JOURNAL_GEN_APPL_ID_FULLSUNC	JournalGenApplIDFullSync	Imports data for the Journal Generator from File or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
Education and Government	PROJECT_ACTIVITY_FULLSYNC	ProjectActivityFullSync	Imports data for Projects from File or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
Education and Government	PROJECT_FULLSYNC	ProjectFullSync	Imports data for Projects from File or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.

Product /Industry	Message	Subscription	Comments
Education and Government	RESOURCE_CAT_FULLSYNC	ResourceCatFullSync	Imports data for Resources from File or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
Education and Government	RESOURCE_SUB_CAT_FULLSYNC	ResourceSubCatFullSync	Imports data for Resources from File or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
Education and Government	RESOURCE_TYPE_FULLSYNC	ResourceTypeFullSync	Imports data for Projects from File or PeopleSoft Financials for Education and Government 7.5. Used for both local and PSFT Financials Node.
ePerformance	EP_CHK_SUG	CheckSugSubscribe	Imports language checker suggestions from 3rd party providers.
ePerformance	EP_CHK_WRD	CheckWordSubscribe	Imports language checker word /phrases from 3rd party providers.
ePerformance	EP_COMP_DEV	CompDevSubscribe	Imports Sub-Competency development tips content from 3rd party providers.

Product /Industry	Message	Subscription	Comments
ePerformance	EP_COMP_PROF	CompProfSubscribe	Imports competency proficiency content from 3rd party providers.
ePerformance	EP_COMPETENCY	CompetencySubscribe	Imports competency proficiency content from 3rd party providers.
ePerformance	EP_DEV_TIP	DevTipSubscribe	Imports sub-competency development tips content from 3rd party providers.
ePerformance	EP_RATING_MDL	RatingModelSubscribe	Imports rating models from 3rd party providers.
ePerformance	EP_REVIEW_RATING	RatingModelSubscribe	Imports rating model review ratings from 3rd party providers.
ePerformance	EP_SUB_WRT	SubWrtSubscribe	Imports sub-competency results writer content from 3rd party providers.
ePerformance	EP_SUB_COMP	SubCompSubscribe	Imports sub-competencies from 3rd party providers.
ePerformance	EP_SUB_DEV	SubDevSubscribe	Imports sub-competency development tips from 3rd party providers.

Product /Industry	Message	Subscription	Comments
ePerformance	EP_SUB_PROF	SubProfSubscribe	Imports sub-competency proficiency content from 3rd party providers.
ePerformance	FUND_LOAD	FundLoad	Imports data for the Fund Chartfield from File or PeopleSoft Financials for Education and Government. Used for both local and PSFT Financials Load
- eRecruit - Payroll for North America	PAYMENT_ERECRUIT_ACKNOWLEDGE	Acknowledge	Published by Payroll to eRecruit to identify which transactions were accepted and which were rejected.
- eRecruit - Payroll for North America	PAYMENT_ERECRUIT_ISSUED	ActualsFromPayrollForNA	Published by Payroll to eRecruit after payments have been made to employees.
- eRecruit - Payroll for North America	PAYMENT_ERECRUIT_REQUEST	PaymenteRecruitRequest	Loads transactions published by eRecruit to Payroll onto paysheets for payment in either an on or offcycle pay run.
- Global Payroll - Human Resources: Manage Variable Compensation	VAR_COMP_PAYMENT_REQUEST_GP	VarCompPaymentRequestGP	Manage Variable Compensation publishes Variable Compensation Payment Request to notify Global Payroll to publish Variable Compensation Rewards.

Product /Industry	Message	Subscription	Comments
- Global Payroll - Human Resources: Manage Variable Compensation	VAR_CMP_PAYMENT_ACKNOWLEDGE_GP	VarCompPaymentAcknowledged	Global Payroll publishes Variable Compensation Payroll Acknowledged to notify Variable Compensation when it has validated (errored or rejected, depending on validation result) a request for awards payment and processed (paid) accepted requests.
Global Payroll Brazil	WORKFORCE_SYNC	GPBR Terminations	Used to insert two variable elements in the supporting element override at payee level for all the terminations. The two variables contain the Termination Version and the Termination Reason
Global Payroll Mexico	WORKFORCE_SYNC	SDI_Hire_termination_job	Used to insert a new row in the SDI Data record (Social Security related information) when a new row with hire, rehire, or termination actions is entered at the job level.

Product /Industry	Message	Subscription	Comments
Global Payroll Mexico	WORKFORCE_SYNC	Termination_version_job	Used to insert two variable elements in the supporting element override at payee level for all the terminations. The two variables contain the Termination Version and the Termination Reason
Human Resources: Administer Workforce business process	WORKFORCE_SYNC	CopySubstantiveJob	Use only if using the Administer Workforce business process's temporary assignments. <i>See PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments.</i> Used to put a substantive job on hold when a temporary assignment is created.

Product /Industry	Message	Subscription	Comments
Human Resources: Manage Professional Compliance business process.	WORKFORCE_SYNC	Professional Compliance	See <i>PeopleSoft 8.8 Human Resources PeopleBook: Manage Professional Compliance</i> , “Getting Started With the PeopleSoft Human Resources Manage Professional Compliance,” PeopleSoft Human Resources Manage Professional Compliance Implementation.
- Human Resources: Manage Variable Compensation - Stock Administration	GRANT_AWARD_UPDATE	GrantAwardUpdate	Used for publishing and subscribing to award data.
- Payroll for North America - Human Resources: Manage Variable Compensation	VAR_COMP_PAYMENT_ACKNOWLEDGE	VarCompPaymentAcknowledged	Payroll for North America publishes Variable Compensation Payment Acknowledge to notify Variable Compensation when it has validated (errored or rejected, depending on the validation result) the request for payment awards and processed accepted (paid) requests.

Product /Industry	Message	Subscription	Comments
- Payroll for North America - Human Resources: Manage Variable Compensation	VAR_COMP_PAYMENT_REQUEST	VarCompPaymentRequest	Variable Compensation publishes Variable Compensation Payment Request to notify Payroll for North America to publish Variable Compensation Rewards.
Time and Labor	DEPT_SYNC	TLDeptSubscription	When Time and Labor is installed the system executes the following code to populate the RI Cntrl table for changes in Use Dept Tbl.
Time and Labor	WORKFORCE_SYNC	TLJobSubscription	Populates the RI control table.
Time and Labor	WORKFORCE_SYNC	SCH_PrimarySchedAssign	
	TREE_CHANGE		

Setting Up and Testing Local Publish and Subscribe EIPs

Use the following steps to set up local publish and subscribe EIPs:

1. Install Web Logic 6.1 and JRE or JSDK installed. Depending on the kind of server you use, use the following versions of JRE:
 - *NT* – JRE version 1.2.2 or greater.
 - *AIX* – JRE version 1.3.0 or greater.
 - *HP* – JRE version 1.2.2 or greater.
 - *SUN* – JRE version 1.2.2 or greater.
2. Install PIA.
 - a. Run the setup program (PS_HOME\setup\mpinternet\setup.exe) to install the new portal and integration web service.
 - b. Accept all defaults.
 - c. Select *Create New* if the setup program asks you to select a domain type.

3. Start WebLogic (Launch Integration Gateway) by running startpia.cmd (c:\bea\wlserver6.1\config\peoplesoft).
4. Connect to the server using a web browser. Use the web address http://localhost:<port no>/ps/ps/signon.html (for example: http://localhost:80/ps/ps/signon.html).

Note. If you cannot access the server using the address above, try using http://localhost:<port no>/ps/ps/?cmd=login.

5. Edit the gateway properties in the IntegrationGateway properties file. The location of the file depends which web server you are using.

If you are using WebLogic, the file is found at c:\bea\wlserver6.1\config\peoplesoft\applications\PSIGW\Weg-inf\IntegrationGateway.properties.

If you are using WebSphere, the file is found at c:\websphere\AppServer\installedApps\peoplesoft\PSIGW\Weg-inf\IntegrationGateway.properties.

Note. When you make changes of any kind to the IntegrationGateway properties file you must stop and restart the Integration Gateway (startpia.cmd) and refresh and reload the gateway definition (see step 6).

Make the following changes:

- a. In the properties file, specify the default node, userid, password, and PeopleTools release:

```
#
## JOLT connect string setting for optional Default Application Server.⇒
  Do NOT specify a NODENAME.
#
# Example:
#ig.isc.serverURL=//MYSERVER:9000
#ig.isc.userid=MYUSERID
#ig.isc.password=MYPASSWORD
#ig.isc.toolsRel=8.40
#

# Uncomment out the following four lines and replace information shown⇒
  in <> with the correct
# information for your Node (remove the <> as well)
ig.isc.serverURL=//atran101999:9000
ig.isc.userid=PS
ig.isc.password= [encrypted password]
ig.isc.toolsRel=8.42-G2
```

- b. You must get the encrypted password. PeopleSoft Integration Broker includes a Java utility for encrypting passwords that you launch from a provided script called PSCipher. To encrypt a password:
 - Change the location of the encryption script file at the command prompt. For WebLogic, change to c:\bea\wlserver6.1\config\peoplesoft. For WebSphere, change to c:\websphere\installedapps\peoplesoft.
 - If you are using Unix, you must change the script file's permissions to chmod 777 PSCipher.sh.

- Execute the script file with your password as an argument. On an NT machine it is pscipher MYPASSWORD and on a Unix machine it's pscipher.sh MYPASSWORD. The utility will return the encrypted password as a string (for example VOB5KcQZMg=)
 - Copy the encrypted string and paste it into the IntegrationGateway.properties file (ig.isc.QE_KACNODE.password=VOB5KcQZMg=).
6. Access the Apps.Server and ensure that the publish and subscribe servers are started.
 7. Access the Process Scheduler.
 8. Configure the local gateway.
 - a. Access the Gateways page (PeopleTools, Integration Broker, Gateways). Enter the following *Gateway URL* : http://<gatewayservername>/PSIGW/PeopleSoftListeningConnector.
 - b. Save your changes.
 - c. Click the *Refresh* and *Load* buttons.
If you make any changes to the Integration Gateway properties file (step 5), you must click the *Refresh* button on this page.
 - d. Save the page once more.
 9. Set up the local node to test messaging for PSFT_HR using the Node Definitions component (PeopleTools, Integration Broker, Node Definitions).
 - a. Access the Node Info page and select the *Default Local Node* checkbox.
 - b. Access the Connectors page and enter LOCAL in the *Gateway ID* field and PSFTTARGET in the *Connector ID* field.
 - c. Access the Transactions page and, enter select a *Transaction Type* of OutAsync for the specific local subscription message. No other transaction is necessary because NODE_A is the default local node and the inbound transaction is implicit, the Integration Engine automatically routes the message appropriately.
 - d. Access the Portal Content page and select the correct Tools and Application releases for the PSFT_HR nodes.
 10. Access the Monitor Messages component (Monitor, Monitor Messages in the HR database).
 - a. Access the Channel Status page. The channel to be tested should have a status of Running.
 - b. Access the Node Status page and try to ping the local node.
 11. Ensure that the messages and message subscription PeopleCode are Active before testing Pub/Sub.
 - a. Open Application Designer and open the Message component. Check the Message Properties and ensure that the system has selected the Active checkbox.
 - b. Open the Subscription Properties page by right clicking on the subscription name ensure that the system has selected the Active checkbox.

Troubleshooting

Below are some problems that may occur when you set up and test local publish and subscribe messages.

Problem	Possible Solution
The message didn't publish.	• Verify that the application server is running the publish and subscribe services. • Verify that the message is active.
The system published the message but keeps it marked with a status of New.	Verify that the channel for that message is running.
The system marks the message as Done but the subscription did not fire.	• Verify that the message subscription is active. • Verify that there is an OutSync transaction for the message on the local node. • Verify that the message channel isn't blocked. Cancel all messages that have not been processed in the channel or use the script below to clear out all entries. • Verify that the IntegrationGateway.properties file is correct. For example, the Tools release in the properties file must exactly match the release you are using. • Verify that the local node is configured. • Verify that you can ping the local node. • Verify that the gateway is configured.
The system marked the message as Done but the subscription did not finish successfully.	Check the Message Errors page to determine what is wrong with the subscription PeopleCode.

Purging IB Data

To clear the channel of all messages use the following script:

```
REMARK
\Delete PubSubQueue
/
DELETE FROM PSAPMSGPUBHDR;
DELETE FROM PSAPMSGPUBDATA;
DELETE FROM PSAPMSGPUBCON;
DELETE FROM PSAPMSGSUBCON;
DELETE FROM PSAPMSGPUBCERR;
DELETE FROM PSAPMSGPUBERR;
DELETE FROM PSAPMSGSUBCERR;
DELETE FROM PSAPMSGPUBCERRP;
DELETE FROM PSAPMSGPUBERRP;
DELETE FROM PSAPMSGSUBCERRP;
DELETE FROM PSAPMSGARCHPC;
DELETE FROM PSAPMSGARCHPD;
DELETE FROM PSAPMSGARCHPH;
```



```
DELETE FROM PSAPMSGARCHSC;  
/  
COMMIT;  
/
```

Understanding HRMS EIPs that Publish Only

Many of the Human Resources Enterprise Integration Points publish only.

When data is added, deleted, or modified in a record that contains an EIP that publishes only, the EIP publishes that data to any other PeopleSoft or third-party application that subscribes to it. However, if the component does not have the same record structure as the message, the data is not published. If the component does have the same record structure at level 0 and level 1, any data in the records that match between the message and the component is published.

Adding Components and Batch Processes

Publish is initiated by the SavePostChange PeopleCode on the record.

- Adding Components.
If you add or have added any additional components that update the records related to EIPs listed in the following section, you do not have to modify them to publish the message. However, any customization made using these records will still need to be tested to make sure that the data is being published correctly.
- Adding Batch processes.
If you add or have added additional batch processes that update the record, you must add your own batch publishes to initiate the publish because the batch processes will not run the SavePostChange PeopleCode on the record.

See Also

PeopleSoft Enterprise Integration PeopleBook

HRMS EIPs that Publish Only

PeopleSoft Human Resources uses Application Messaging technology in the following EIPs, which are listed by the general business process that they support:

Setup Data Synchronization	
EIP Name	Related Records
Company Property	COMP_PROP_TBL

Setup Data Synchronization	
EIP Name	Related Records
Company Table	COMPANY_TBL, COMPANY_TBL_ITA, COMP_CCC_TBL, COMP_PENS_FRA, COMP_PHONE_TBL,
Country Table	COUNTRY_TBL
Market Rates Data	RT_INDEX_TBL, RT_TYPE_TBL, RT_RATE_DEF_ TBL, CURR_QUOTE_TBL, RT_RATE_TBL
Product Chartfield Table	PRODUCT_TBL
Table Set Control	SET_CNTRL_TBL, SET_CNTRL_GROUP, SET_CNTRL_REC, SETID_TBL

Create Framework for Human Resources Management	
EIP Name	Related Records
Accomplishment Cluster	RS_CLUSTER_ACOMP
Action/Reason Table	ACTN_REASON_TBL
APE Industry Codes Table – France	APE_INDSTRY_FRA
Bank Table	BANK_EC_TBL, BANK_BRANCH_TBL
Business Unit Table HR	BUS_UNIT_TBL_HR
Competency Table	COMPETENCY_TBL, COMPETENCY_TYPS, ACCOMP_TBL, MAJOR_TBL,
Competency Cluster	RS_CLUSTER_COMP
Competency Type	RS_TYPE_TBL
Contract Table – Belgium	CNT_END_TBL_BEL, CNT_RSN_TBL_BEL
Department Table	DEPT_TBL

Create Framework for Human Resources Management	
EIP Name	Related Records
Frequency	FREQUENCY_TBL
Holiday Dates	HOLIDAY_DATE
Industry Inspection Table – Germany	INDUST_INSP_GER
Job Family	JOB_FAMILY_TBL
Job Code Table	JOBCODE_TBL, CAN_JOBCODE_CU, JBCD_CMP_RT2_VW, JBCD_CMP_RT3_VW, JOB_CD_TRN_PROG
Labor Category Tables	TARIFF_AREA_GER
Labor Relations	SPK_COMM_GER, WRKS_CNCL_LCL
Location Table	LOCATION_TBL
Name Prefix/Suffix Tables	NAME_PREFIX_TBL, NAME_SUFFIX_TBL, NM_ROYPREF_TBL, NM_ROYSUFF_TBL
Nations Duvo Table – Germany	NATIONS_DUEVO
Occupational Illness Table – France	OCC_ILLNESS_FRA
Position Data	POSITION_DATA
Rating Description	RS_RATING_DESCR
Regulatory Region Table	REG_REGION_TBL
Role Accomplishments	RS_ROLE_ACCOMPS
Role Cluster	RS_CLUSTER_TBL
Role Competency / Accomplishment	RS_ROLE
Role Competencies	RS_ROLE_COMPS

Create Framework for Human Resources Management	
EIP Name	Related Records
Salary Structure WFA	SAL_GRADE_TBL, SAL_STEP_TBL, SAL_RATECD_TBL
School Table	SCHOOL_TBL
Special Projects	PERSON, SPECL_PROJECT
Statute Tables – Belgium	STATUTE_TBL_BEL, SUBSTAT_TBL_BEL
Union Table	UNION_TBL
Visa Permit	VISA_PERMIT_TBL, VISA_PERMIT_SUP
Workforce Data	EMPLOYMENT, BEN_PROG_PARTIC, JOB, COMPENSATION, JOB_EARNS_DIST, JOB_JR,

Track Employee Information and Changes	
EIP Name	Related Records
Person Accomplishments	PERSON, ACCOMPLISHMENTS
Person Company Property	PERSON, COMP_PROP
Person Competency	PERSON, CM_EVALUATIONS, COMPETENCIES
Person Contract	PERSONAL_DATA, CONTRACT_DATA, CNT_PROBATION, WKF_CNT_TYPE, WKF_CNT_CLAUSE
Person Contract – Belgium	EMPLOYMENT, CONTRACT_BEL, CONTR_ENDS_ BEL, CONTR_REPS_BEL
Person Credit Card	CC_CARD_TBL_EX, CC_CARD_DATA_EX
Person Disability	DISABILITY, ACCOM_REQUEST, ACCOM_ DIAGNOSIS, ACCOM_JOB_TASK, ACCOM_ OPTION, DISABILITY_CHE, DISABILITY_FRA, DISABILITY_GER,

Track Employee Information and Changes	
EIP Name	Related Records
Person Diversity	DIVERSITY
Person Education	SCHOOL_EDUCAT, EDUC_AREA_STUDY, RS_APP_MESSAGE
Person ID Change	PERSON, EMAIL_ADDRESSES, PERSONAL_PHONE, PERS_DATA_EFFDT, PERS_NID, NAMES, ADDRESSES
Person ID Delete	PERSONAL_DATA
Person Names	PERSON, NAMES
Person Prior Work Experience	PERSON, PRIORWORK_EXPER
Person Visa/Citizenship	PERSON, CITIZEN, CITIZEN_PSSPRT, VISA_PMT_DATA, VISA_PMT_SUPPRT
Personal Data	PERSON, EMAIL_ADDRESSES, PERSONAL_PHONE, PERS_DATA_EFFDT, PERS_NID, NAMES, ADDRESSES

Create and Execute Compensation Structure	
EIP Name	Related Records
Compensation Market rate	WA_MKT_RATE_TBL
Rating Model	RATING_MDL_TBL, REVW_RATING_TBL
Review Scale Tables	RE VW_SCALE_TBL, REVW_FACTOR_TBL, REVW_FCT_PT_TBL
Salary Matrix	SAL_MATRIX_TBL, SAL_MATRIX_PCT
Salary Plan	SAL_PLAN_TBL

Create and Execute Compensation Structure	
EIP Name	Related Records
Salary Structure	SAL_GRADE_TBL, SAL_STEP_TBL, SAL_RATECD_TBL
Salary Structure WFA	SAL_GRADE_TBL, SAL_STEP_TBL, SAL_RATECD_TBL

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

Enterprise-Wide Table Synchronization by HRMS EIPs that Publish Only

The following EIPs are available to synchronizing data between tables that share the same table structure across PeopleSoft enterprise applications.

EIP Name	Related Records
Business Unit Table (HR)	BUS_UNIT_TBL_HR
Country Table	COUNTRY_TBL
Currency Code Table	CURRENCY_CD_TBL
Department Table	DEPT_TBL
GL Account Table	GL_ACCOUNT_TBL
Location Table	LOCATION_TBL
Market Rates Data	RT_INDEX_TBL, RT_TYPE_TBL, RT_RATE_DEF_TBL, CURR_QUOTE_TBL, RT_RATE_TBL
Product Chartfield	PRODUCT_TBL
Project Table	PROJECT

EIP Name	Related Records
State Table	STATE_TBL
Unit of Measure	UNITS_TBL, UNITS_CVT_TBL

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

Understanding Other HRMS Enterprise Integration Points

EIPs that support particular business processes are documented throughout PeopleSoft HRMS PeopleBooks.

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Variable Compensation, “Managing Awards Approval and Payout”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Commitment Accounting, “Understanding Commitment Accounting Integration Points”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Professional Compliance, “Setting Up PeopleSoft Human Resources Manage Professional Compliance”

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Managing Employee Referral Programs”

PeopleSoft 8.8 Payroll for North America PeopleBook, “Administering the Interface with PeopleSoft Time and Labor”

PeopleSoft 8.8 Payroll for North America PeopleBook, “Administering Interfaces With PeopleSoft HRMS and PeopleSoft Expenses”

PeopleSoft 8.8 Payroll for North America PeopleBook, “Administering the Interface with PeopleSoft General Ledger”

PeopleSoft 8.8 Payroll for North America PeopleBook, “Administering the Interface with PeopleSoft Payables”

PeopleSoft 8.8 Global Payroll PeopleBook, “Working With Interfaces”

PeopleSoft 8.8 Stock Administration PeopleBook, “Administering Variable Compensation Grants,” Integrating with Variable Compensation

PeopleSoft 8.8 Time and Labor PeopleBook, “Using Time Collection Devices (TCDs),” Receiving Time from a TCD

PeopleSoft 8.8 Time and Labor PeopleBook, “Integrating With PeopleSoft Financials and Enterprise Performance Management”

PeopleSoft 8.8 Time and Labor PeopleBook, “TCD Interface”

PeopleSoft 8.8 Resume Processing PeopleBook, “Understanding PeopleSoft Resume Processing,” Understanding the Extraction Process

PeopleSoft Enterprise Integration PeopleBook

APPENDIX A

PeopleSoft Application Fundamentals for HRMS Reports

PeopleSoft Human Resources supplies a group of standard reports to help you review the entries in the various tables you use to set up controls for your Human Resources system, including departments, companies, locations, and job codes. For international purposes, you can review the currency codes and exchange rates to see if you need to update the data.

This appendix provides summary tables of basic HRMS reports and Human Resources reports.

Note. For samples of these reports, see the PDF files published on CD-ROM with your documentation.

See Also

PeopleTools PeopleBook: Process Scheduler

Basic PeopleSoft HRMS Reports: A to Z

These tables list basic PeopleSoft HRMS reports as well as reports for specific PeopleSoft Human Resources business processes sorted by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Basic HRMS Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGPER802 Geographic Location Table report	Produces a detailing of the Geographic Location Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Geographic Location Table	PRCSRUNCNTL
FGPER803 Agency report	Prints all agencies in the Agency Table and default information, including name and address, agency code, and effective date.	Set Up HRMS, Foundation Tables, Organization, Agency USF	PRCSRUNCNTL
FGPER804 Sub-Agency Table report	Prints all sub-agencies in the Sub-Agency Table and their associated agencies.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Sub-Agency Table	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FGPER805 Personnel Office ID Table report	Prints information about all Personnel Offices in your agency.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Personnel Office ID Table	PRCSRUNCNTL
FGPER807 Locality Pay Area Table report	Prints information for every Locality Pay Area.	Set Up HRMS, Product Related, Compensation, Locality Pay Area Rpt USF	PRCSRUNCNTL
FGPER808 LEO Pay Area Table report	Lists each LEO Special Pay Area and associated percentage.	Set Up HRMS, Product Related, Compensation, LEO Pay Area Rpt USF	PRCSRUNCNTL
FGPER811 Handicap Table report	Prints all disabilities and their associated codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Handicap Table	PRCSRUNCNTL
FGPER812 Legal Authority Table report	Prints the information about the legal authorities you set up in the Legal Authority table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Legal Authority Table	PRCSRUNCNTL
FGPER813 Nature of Action Table report	Generates a detailing of the Nature of Action Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Nature of Action Table	PRCSRUNCNTL
FGPER814 NOA Authority 1 report	Generates a detailing of the Nature of Action/Authority 1 Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, NOA / Authority 1	PRCSRUNCNTL
FGPER816 Priority Placement Table report	Generates a detailing of the Priority Placement Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Priority Placement Table	PRCSRUNCNTL
FGPER817 Work Location Table report	Prints a detailing of the Work Location Table.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Work Location Table	PRCSRUNCNTL
FGPER823 USF Job Code Table report	Prints a list of all job codes and the date on which they become effective.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports USF, Job Code Table	PRCSRUNCNTL
GBP001 Group Member Overlapping	Shows when members belong to more than one group.	Set Up HRMS, Common Definitions, Group Build, Group Overlapping	RUNCTL_GBP001
GBP002 Group Membership report	Lists all the members in a particular group.	Set Up HRMS, Common Definitions, Group Build, Group Membership	RUNCTL_GBP002

Report ID and Report Name	Description	Navigation	Run Control Page
PAY701 Bank/Branch	Lists banks/branches entered in the Bank/Branch table.	Set Up HRMS, Common Definitions, Banking, Bank/Branch Report	PRCSRUNCNTL
PAY710 Account Code Report	Lists account codes set up in the Account Code Table.	Set Up HRMS, Common Definitions, Payroll, Account Code Report	PRCSRUNCNTL
PAY711 Pay Group report	Prints each pay group and its effective date along with the processing characteristics that apply to that group.	Set Up HRMS, Product Related, Payroll Interface, Reports, Pay Group Table	PRCSRUNCNTL
PAY717 Earnings Program Table	Prints a detailing of your pay plan definitions.	Set Up HRMS, Product Related, Payroll Interface, Reports, Earnings Program	PRCSRUNCNTL
PER701 Department Table report	Lists all departments by Department ID.	Set Up HRMS, Foundation Tables, Organization, Department Table Report	PRCSRUNCNTL
PER702 Installation Table report	Lists default values for field defaults, such as company code, minimum/maximum standard hours, and Social Security number.	Set Up HRMS, Install, Installation Table Report	PRCSRUNCNTL
PER705 Location Table report	Lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).	Set Up HRMS, Foundation Tables, Organization, Location Table Report	PRCSRUNCNTL
PER707 Company Table report	Prints all companies in the Company Table and default information, including name and address, company code, and effective date. The report PAY702 prints the General Ledger information you enter in the Company Table.	Set Up HRMS, Foundation Tables, Organization, Company Table Report	PRCSRUNCNTL
PER708 Country Table report	Prints a list all countries –character codes.	Set Up HRMS, Install, Country Table Report	PRCSRUNCNTL
PER709A US Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for U.S.-based companies.	Set Up HRMS, Product Related, Workforce Administration, Jobcode Rpt USA	PRCSRUNCNTL
PER709B Can Job Code Table report	Prints a list of all job codes and the date on which they become effective. It also lists all Job Code page information for Canada-based companies.	Set Up HRMS, Product Related, Workforce Administration, Jobcode Table Report CAN	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER709C Job Code Table report	Prints a list of all job codes and the date on which they become effective.	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table	PRCSRUNCNTL
PER711 Standard Letter Table report	The Standard Letter Table report lists the codes in your Standard Letter Table.	Set Up HRMS, Common Definitions, Standard Letter Report	PRCSRUNCNTL
PER713 Currency Code Table report	Prints information about each currency.	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Code Table	PRCSRUNCNTL
PER714 Currency Rate Table report	Prints information about exchange rates.	Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Rate Report	PRCSRUNCNTL

Administer Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP013 Update Seniority Pay Reporting	Lists employees and all their seniority changes. Run this report after you've run the Update Seniority Pay process (HR_CMP013) and before you run the Upd Seniority Pay – Load Data process (HR_CMP013_CI) to load the changes to Job.	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Pay	RUNCTL_SENPAY2
CMP014S Update Seniority Eligibility Reporting	Lists employees and all their seniority changes. Run this report after you've run the Update Seniority Eligibility process (HR_CMP014) and before you run the Upd Seniority Elig – Load Data process (HR_CMP014_CI) to load the changes to Job.	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Eligibility	RUNCTL_SENPAY
CMP015 Refresh Employee Compensation	Reports on all the changes performed by the General Compensation Update Process. Run this report after you've run the General Compensation Update process (HR_CMP015).	Workforce Administration, Collective Processes, Refresh Compensation	RUNCTL_CMP015
CMP016 Defaulting Rules Eligibility	Lists the employees eligible for the selected defaulting rules as of selected date.	Set Up HRMS, Foundation Tables, Compensation Rules, Defaulting Rules Eligibility Rpt	RUNCTL_CMP016

Administer Training Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF182 (USF) SF182	Provides a standardized mechanism for generating SF182 reports to request, authorize, and detail estimates costs and billing as well as certify training programs for employees. (SQR)	Enterprise Learning, Training Reports, SF182	RUN_FGSF182A
MXSTP001 (Format) (MEX) DC-1 Training Mixed Committee Constitution	Provides details about the formation of a training mixed committee and the establishment associated with the mixed committee.	Enterprise Learning, Training Reports, STPS DC-1 Format MEX	RUNCTL_STP001
MXSTP002 MXSTP002 (Reverse)	See above.	Enterprise Learning, Training Reports, STPS DC-1 Format MEX	RUNCTL_STP001
MXSTP003 (Format) (MEX) DC-2 Training and Development Plans	Provides training and development plan information, including training objective priorities. Also provides the establishment associated with the mixed committee.	Enterprise Learning, Training Reports, STPS DC-2 Format MEX	RUNCTL_STP003
MXSTP004 MXSTP004 (Reverse)	See above.	Enterprise Learning, Training Reports, STPS DC-2 Format MEX	RUNCTL_STP003
MXSTP005 (MEX) DC-2B Training and Development Registration Application	Generates a Training and Development Registration Application report.	Enterprise Learning, Training Reports, STPS DC-2B Format MEX	RUNCTL_STP005
MXSTP006 (MEX) DC-3 Courses/Events Certificates	Creates a Courses/Events Certificate.	Enterprise Learning, Training Reports, STPS DC-3 Format MEX	RUNCTL_STP006
MXSTP007 (MEX) DC-4 Courses/Events Certificates List	Creates a Courses/Events Certificates list.	Enterprise Learning, Training Reports, MEX STPS DC-4 Format	RUNCTL_STP007
MXSTP008 (Format) (MEX) DC-5 Training and Development External Registration Application	Generates a Training and Development External Registration application and an instructor list.	Enterprise Learning, Training Reports, STPS DC-5 Format MEX	RUNCTL_STP008
MXSTP009 MXSTP009 (Reverse)	See above	Enterprise Learning, Training Reports, STPS DC-5 Format MEX	RUNCTL_STP008

Report ID and Report Name	Description	Navigation	Run Control Page
PER107GR (DEU) Int. Prof. Education Status (internal professional education status)	Details the current status of employees who are enrolled in an internal education training plan. Includes only employees who selected the Intern check box and didn't select <i>Graduated</i> on the Professional Education page. (Crystal)	Enterprise Learning, Training Reports, Int Prof Education Status DEU	PRCSRUNCNTL
PER703 Course Table	Lists available courses, including course descriptions, type codes, locations, durations, and schools. You can use it to track internal courses and courses offered by outside vendors. (Crystal)	Enterprise Learning, Course Reports, Courses	PRCSRUNCNTL
TRN001 Training Letters	Creates training letters. (SQR, Word for Windows)	Enterprise Learning, Student Enrollment, Create Training Letters	RUNCTL_TRN001
TRN002 Course Session Roster	Lists the course name, session number, session start date, and all students who are enrolled in a course. (Crystal)	Enterprise Learning, Course Reports, Course Session Roster	RUNCTL_TRN002
TRN003 Course Waiting List	Lists all students who are on the course or session wait list for a course. (Crystal)	Enterprise Learning, Course Reports, Course Waiting List	RUNCTL_TRN003
TRN004 Training Schedule	Lists all course sessions that are scheduled within a given period. (Crystal)	Enterprise Learning, Training Reports, Training Schedules	RUNCTL_TRN004
TRN005 Training Facility Schedule	Lists all course sessions scheduled at a training facility during a given period. All sessions are listed by course start date. (Crystal)	Enterprise Learning, Training Reports, Training Facility Schedules	RUNCTL_TRN005
TRN010 Active Scenario Summary	Summarizes approved training demands and budget information for a business unit. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Active Scenario Summary	RUNCTL_TRN010
TRN011 Global Scenario Summary	Provides a summary of approved training demands and budget information for the department or business unit retrieving the information from the selected global scenario. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Global Scenario Summary	RUNCTL_TRN011
TRN016 Target Course Certifications	Lists the license/certifications that students receive on successful completion of a course. (Crystal)	Enterprise Learning, Course Reports, Target Course Certifications	RUNCTL_TRN016

Report ID and Report Name	Description	Navigation	Run Control Page
TRN017 Course Rating	Details ratings for sessions of a course. (Crystal)	Enterprise Learning, Course Reports, Course Rating	RUNCTL_TRN017
TRN018 Course Attendance Status	Lists the attendance status of the students in a course. (SQR)	Enterprise Learning, Course Reports, Attendance Status	RUNCTL_TRN018
TRN019 Course Rating Templates	Serves as the evaluation template to be completed by students enrolled in a course session. (Crystal)	Enterprise Learning, Course Reports, Course Rating Templates	RUNCTL_TRN019
TRN020 Student Training History	Lists the courses and sessions completed by a student. (Crystal)	Enterprise Learning, Training Reports, Student Training History	RUNCTL_TRN020
TRN021 Training Program	Lists the training program for an employee. (SQR)	Enterprise Learning, Training Reports, Training Programs, Course Attend. School Program	RUNCTL_TRN021
TRN022 Statistics of EEs Enrolled (statistics of employees enrolled)	Lists the employees who are enrolled in courses and lists course statistics by company, location, and department. (SQR)	Enterprise Learning, Training Reports, Statistics of EEs Enrolled, Course Statistics	RUNCTL_TRN022
TRN023 Course Description	Lists a course description. (Crystal)	Enterprise Learning, Course Reports, Course Description	RUNCTL_TRN023
TRN024 Course Category	Lists training catalog course categories. (Crystal)	Enterprise Learning, Course Reports, Course Category	RUNCTL_TRN024
TRN025 Course Equipment	Lists equipment needed for a course. (Crystal)	Enterprise Learning, Course Reports, Course Equipment	RUNCTL_TRN025
TRN026 Course Vendors	Lists vendors that are associated with a course on the Course Table. (Crystal)	Enterprise Learning, Course Reports, Course Vendors	RUNCTL_TRN026
TRN027 Prerequisite Courses	Lists prerequisite courses for a course. (Crystal)	Enterprise Learning, Course Reports, Prerequisite Courses	RUNCTL_TRN027
TRN028 Target Qualifications	Lists competencies that the course aims to develop or improve. (Crystal)	Enterprise Learning, Course Reports, Target Qualifications	RUNCTL_TRN028
TRN029 (FRA) Report Training 2483	Compiles results of calculation of the 2483 indicators for declaring vocational training of employees in French organizations. Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page. (Crystal)	Enterprise Learning, Training Reports, 2483 Tax Declaration FRA	RUNCTL_TRN029

Report ID and Report Name	Description	Navigation	Run Control Page
TRN030 Training Plan Summary	Lists all courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost; the number of people approved; and the total number of hours of training, which is calculated by multiplying the number of approved employees by the course duration. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Training Plan Summary	RUNCTL_TRN030
TRN032 EE Sessn Cost Summary (employee session cost summary)	Lists the costs that are associated with an employee who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, employee expense, and session expense. (SQR)	Enterprise Learning, Training Reports, EE Session Cost Summary	RUNCTL_TRN032
TRN033 Training Instructor Schedule	Lists the courses that an instructor is scheduled to teach during a given period. (Crystal)	Enterprise Learning, Training Reports, Training Instructor Schedule	RUNCTL_TRN033
TRN034 Equipment Checklist	Lists equipment that is required for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period. (SQR) Before running this report, set up the course session in the Course Session Table.	Enterprise Learning, Training Reports, Equipment Checklist	RUNCTL_TRN034
TRN035 (FRA) Training Plan: Distribution	Details how a French organization's training demands are distributed by gender and professional category, such as executive, manager, office worker, qualified worker, and nonqualified worker. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Trng Plan Distribution FRA	RUNCTL_TRN035
TRN036 (FRA) Training Plan: Cost Details	Lists a French organization's training costs that are associated with each course. Details these cost types: facility, instructor, vendor, equipment, salary costs, and expenses. (SQR)	Enterprise Learning, Training Budget, Budget Reports, Trng Plan Cost Details FRA	RUNCTL_TRN036

Administer Workforce Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CNT001 Contract Information	Lists the contract history for a selected employee or all employees. You can specify a date range for the report for include all contract history.	Workforce Administration, Job Information, Contract Administration, Contract Information Report	RUNCTL_CNT001
ES931 Print Wage and Separation	Prints an ES-931 Request for Wage and Separation Information report.	Workforce Administration, Job Information, Reports, Print Wage/Separation USF	GVT_PRINT_ES931
FGHR015 Union Membership	(For U.S. federal government users) Lists each union organization and the employees who are members. Before you run this report you must run the Refresh Employees Table process.	Workforce Administration, Labor Relations, Reports, Union Membership USF	PRCSRUNCNTL
FGHR017 Personnel Actions History	Lists all employees affected by each of the job actions you enter. It prints the following information: employee name, department, effective date, and reason for the action. For each employee the report lists original hire date, total years of service, employee type, regular/temporary, full/part-time, job code and title, salary grade, compensation rate associated with the action, and supervisor's name.	Workforce Administration, Job Information, Reports, Personnel Actions History USF	RUNCTL_PER015
FGPER810 Award Type Table	Generates an award type table report.	Workforce Administration, Job Information, Reports, Award Action USF	PRCSRUNCNTL
FGSF61 Appointment Affidavits	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.	Workforce Administration, Job Information, Reports, Appointment Affidavits USF	RUNCTL_FGSF61
FGSF75 Request for Preliminary Employment Data	Produces a Request for Preliminary Employment Data form.	Workforce Administration, Job Information, Reports, Request Prelim Employ Data USF	RUN_CNTL_FGSF75

Report ID and Report Name	Description	Navigation	Run Control Page
FGSF5052 Request for Personnel Action/Notice of Personnel Action	Prints the official Notification of Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.	- Workforce Administration, Job Information, Reports, Request Personnel Action USF - Workforce Administration, Job Information, Reports, Notice of Personnel Action USF	RUNCTL_PAR
OHS002 Discipline Action Summary	Summarizes all disciplinary actions taken against employees within a specified date range. The report itemizes actions by date, by incident, and by employee.	Workforce Administration, Labor Relations, Reports, Discipline Action Summary	RUNCTL_OHS_FROMTO
OHS004 Grievance Detail	Lists the detailed grievance information for a formally filed grievance against the company.	Workforce Administration, Labor Relations, Reports, Grievance Detail	RUNCTL_OHS_NONE
OHS005 Employee Disciplinary Action	Lists the detailed disciplinary action information for specific employees.	Workforce Administration, Labor Relations, Reports, Employee Disciplinary Action	RUNCTL_OHS005
OHS006 Grievance Summary	Summarizes the grievances filed against the company, along with the associated actions and resolutions.	Workforce Administration, Labor Relations, Reports, Grievance Summary	RUNCTL_OHS_FROMTO
PER001 Department Action Notices	Lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. Run the Refresh Employees Table process before running this report.	Workforce Administration, Workforce Reports, Department Action Notices	PRCSRUNCNTL
PER001CH CHE Company Statistics	This report provides information on employee wages, occupations, and other data necessary for the Company Statistics Report (Betriebszählung). The Swiss Federal Department of Statistics requires all Swiss companies to create this report every ten years.	Workforce Monitoring, CHE-Company Statistics	RUNCTL_PER001_CHE

Report ID and Report Name	Description	Navigation	Run Control Page
PER002 Employee Birthdays	Lists employees, their birthdays, and other identifying information. Run the Refresh Employees Table process before running this report.	Workforce Administration, Biographical, Birthdays Report	RUNCTL_PER002
PER003 Years of Service	Lists employees who have completed the number of years of service you specify, as of the point in time you specify. Use this report as a reminder of employees who are eligible for vested benefits plans or service recognition awards.	Workforce Administration, Job Information, Reports, Years of Service	RUNCTL_PER003
PER004 Emergency Contacts	Lists all contacts entered on the Emergency Contact table for each employee in the system. Run the Refresh Employees Table process before running this report.	Workforce Administration, Personal Information, Emergency Contacts Report	PRCSRUNCNTL
PER005 Employees on Leave of Absence	Lists all employees on leave and their expected return dates. Use this report to compare the return date you've already entered in PeopleSoft Human Resources with the employee's expected return date or as a reminder for you to enter the return from leave information in the system. Run the Refresh Employees Table process before running this report.	Workforce Administration, Job Information, Reports, Employees on Leave of Absence	PRCSRUNCNTL
PER006 Mailing Labels	Produces a three-across set of mailing labels for all employees in your PeopleSoft Human Resources database. Run the Refresh Employees Table process before running this report.	Workforce Administration, Biographical, Mailing Labels Report	PRCSRUNCNTL
PER007 Temporary Employees	Provides an alphabetical list of all employees marked as temporary, along with length of service and other details of employment.	Workforce Administration, Job Information, Reports, Temporary Employees	RUNCTL_ASOFDATE

Report ID and Report Name	Description	Navigation	Run Control Page
PER009 Union Membership	(For users in the USA and Canada) Lists each union organization and the employees who are members. Run the Refresh Employees Table process before running this report.	Workforce Administration, Labor Relations, Reports, Union Membership	PRCSRUNCNTL
PER010 Employee Turnover Analysis	This time-slice report lists each department ID and provides the employee counts as of the date you specify.	Workforce Administration, Workforce Reports, Employee Turnover Analysis	RUNCTL_FROMTHRU
PER015 Personnel Actions History	Lists all employees affected by each of the job actions you enter.	Workforce Administration, Job Information, Reports, Personnel Actions History	RUNCTL_PER015
PER020 Employee Home Address Listing	Contains a complete listing of all employees with addresses and home phone numbers.	Workforce Administration, Biographical, Home Address Report	PRCSRUNCNTL
PER021 Pending Future Actions	Lists all employees with job action notices scheduled for a future date.	Workforce Administration, Workforce Reports, Pending Future Actions	RUNCTL_ASOFTD_COMP
PER029 Database Audit	Monitors changes, additions, or deletions made to sensitive fields such as salary amounts.	Workforce Administration, Workforce Reports, Database Audit	RUNCTL_FROMTHRU
PER032 Passport/Visa Expiration	Lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.	Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER033 Citizenship/Country/Visa Audit	Lists discrepancies between employee citizenship country/status and visa data. Displays various discrepancies found for the employee citizenship status in the Personal Data table. Looks for the country specified in the Installation table and uses it as the local country.	Workforce Administration, Personal Information, Citizenship, Citizenship/Country/Visa Audit	PRCSRUNCNTL
PER038NL NLD Law SAMEN Statistics	Produces the required SAMEN statistics information related to the number of people in the workforce born in a so-called SAMEN country, or of whom one of the parents has been born in one such country.	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Report	RUNCTL_PER038_NL
PER039GR GER Heavily Disabled	Prints a list of heavily disabled employees and additional information about their disabilities.	Workforce Administration, Personal Information, Disability, Heavily Disabled GER	RUNCTL_PER039GR
PER040GR GER Heavily Disabled Equaliz.	Calculates the required number of heavily disabled employees and the equalization amount of money if the required number of heavily disabled employees is not fulfilled.	Workforce Administration, Personal Information, Disability, Heavily Disabl Equalizatn GER	RUNCTL_PER040GR
PER053 ITA Equal Opportunities	Submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.	Workforce Administration, Labor Relations, Reports, Equal Opportunities ITA	RUNCTL_PER053
PER054 ESP Official List	Compiles the information you need for Matricula book reporting.	Workforce Administration, Workforce Reports, Official List ESP	PER054_ESP
PER055 Union Fees	(For users in Spain) Shows the employees and fees per union and month.	Workforce Administration, Labor Relations, Reports, Union Fees ESP	RUNCTL_PER055_ESP
PER058 Primary Job Audit	Lists all employees and/or nonemployees whose job records show potential problems.	Workforce Administration, Workforce Reports, Primary Job Audit	RUNCTL_PER058

Report ID and Report Name	Description	Navigation	Run Control Page
PER059 ITA Union	There are two Italian union reports. You can run a union report generating a list of employees and employee information by union. You can also run a union report listing the number of employees belonging to each union, sorted by category.	Workforce Administration, Labor Relations, Reports, Union Report ITA	RUNCTL_PER059
PER060 ITA Disability	Runs the Annual, Name List, or Disability Statistics reports.	Workforce Administration, Personal Information, Disability, Disability Report ITA	RUNCTL_PER060
PER061 Labor Relations Letters	Generates various labor relations letters based on data supplied and the type of letter selected.	Workforce Administration, Labor Relations, Reports, Labor Relations Letters	RUNCTL_PER061
PER063JP Appointment Notification JPN	Runs appointment notifications. Depending on the Action/Reason combination you use in the run control, this report prints individual employee notifications of hire, rehire, retirement, transfer, and promotion.	Workforce Administration, Job Information, Reports, Appointment Notification JPN	RUNCTL_NTF_JPN
PER064JP Appointment List JPN	Runs appointment list reports.	Workforce Administration, Job Information, Reports, Appointment List JPN	RUNCTL_NTF2_JPN
PER065JP Completion of IC Transfer JPN	Lists employees on temporary intercompany transfer.	Workforce Administration, Job Information, Reports, Completion of IC Transfer JPN	RUNCTL_PER065_JPN
PER066BE Termination Notification	Provides details of the contractual and compensation implications for a Belgian employer in case of a termination, based on the notification period according to the Claey's formula.	Workforce Administration, Collective Processes, Administration BEL, Create Notification	RUNCTL_PER066_BEL
PER066IT ITA Hiring Letters	Produces the hiring letter which is printed at hiring time and is signed by employee and employer. It gives details of the terms of the job, including probation period and duration.	Workforce Administration, Increase Workforce, Hire Letter ITA	RUNCTL_PER066_ITA
PER066JP Employee Assignment List JPN	Lists employees by department, including Additional Appointment employees.	Workforce Administration, Job Information, Reports, Employee Assignment List JPN	RUNCTL_EMPLIST_JPN

Report ID and Report Name	Description	Navigation	Run Control Page
PER067BEL Social Report	Reports a variety of employer/employee information required by the government.	Workforce Administration, Workforce Reports, Social Report BEL	RUNCTL_PER067BE
PER100CN CAN Hire List	Produces a hire list that provides information on social insurance numbers, effective dates, and badge/payroll numbers within the date range provided.	Workforce Administration, Increase Workforce, Hire Report CAN	RUNCTL_FROMTHRU
PER103CN OEE Groups by OCC Group	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The report lists the totals of active employees within each defined area code(s) employed within the date range.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report	RUNCTL_FTCANAC
PER104CN OEE Groups by Employment Type	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Emplmt Type Rpt	RUNCTL_FTCANAC
PER105CN OEE Work Force Survey Stats	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats	RUNCTL_PER105CN

Report ID and Report Name	Description	Navigation	Run Control Page
PER106CN OEE Groups/Jobs Filled/Vacatd	While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Groups/Jobs Filled/Vacated report lists the totals of active employees within the defined area code(s) employed within the date range.	Workforce Administration, Personal Information, OEE Workforce Survey CAN, OEE Groups/Jobs Filled/Vacated	RUNCTL_FTCANAC
PER506 Dept Tbl/Security Tree Audit	Lists discrepancies between the data you've entered in the Department Tree and the departments you've added to the current security tree.	Set Up HRMS, Security, Department Security, Security Tree Audit	PRCSRUNCNTL
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the minimum, maximum, and midpoint rates for each grade.	Compensation, Salary Planning, Salary Plan Reports, Salary Grade	PRCSRUNCNTL
PER706B Salary Grade/Step Table	Combines the information in the Salary Grade table and the Salary Step Components table into a list showing all grades for each salary plan that exists in your company and the hourly, monthly, and annual rate amount for any steps you set up. You can select to show the components in each step.	Compensation, Salary Planning, Salary Plan Reports, Salary Grade/Step	RUNCTL_PER706B
PER710 Action Reason Table	Lists the reason codes for each personnel action code and arranges them alphabetically by action.	Set Up HRMS, Product Related, Workforce Administration, Action Reason Report	PRCSRUNCNTL
PER801SG Employee Listing	Provides employee information based on the run control selections of Department, Employee Name, or Employee ID.	Workforce Administration, Job Information, Reports, Employee Listing SGP	RUNCTL_EMP_LIST
SOCS_AFI_ESP AFI Report	The AFI process generates a flat file that lists changes in workforce, such as hiring, terminations, personal or job data changes, for a given period. This file is submitted to the social security authorities.	Workforce Administration, Workforce Reports, AFI Report ESP	RC_SOCS_AFI_ESP

Report ID and Report Name	Description	Navigation	Run Control Page
TAS001 Temp Assignment w/out End Date	Lists employees currently on temporary assignment where end dates have not been defined.	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date	RUNCTL_TAS001
TAS002 Temp Assignment due to Complete	Lists employees due to complete temporary assignments within user specified date range.	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete	RUNCTL_TAS002

Manage Commitment Accounting Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BUD001 Department FTE	Run a Department FTE (department full time equivalent) report, which captures the difference between full time equivalent caps and FTE actuals for each department.	- Set Up HRMS, Product Related, Commitment Accounting, Reports, Department FTE - Set Up HRMS, Product Related, Commitment Accounting, Reports CAN, Department FTE - Set Up HRMS, Product Related, Commitment Accounting, Reports USA, Department FTE	RUNCTL_FRMTHRU_DPT
BUD009 Encumbrance Messages	Run an Encumbrance Message report, which provides information on encumbrance processing error messages. Before using this page, you must have run the encumbrance processes.	- Set Up HRMS, Product Related, Commitment Accounting, Reports, Encumbrance Messages - Set Up HRMS, Product Related, Commitment Accounting, Reports CAN, Encumbrance Messages - Set Up HRMS, Product Related, Commitment Accounting, Reports USA, Encumbrance Messages	RUNCTL_BUD009

Report ID and Report Name	Description	Navigation	Run Control Page
BUD011 Funding Summary	Run a Funding Summary Report page, which lists a summary of funding information for positions or employees within a department. This report can also print information about a specific position or employee when you enter employee or position information as a run control. Before using this page, you must have set up funding information for the departments on which you are reporting.	• Set Up HRMS, Product Related, Commitment Accounting, Reports, Funding Summary Report • Set Up HRMS, Product Related, Commitment Accounting, Reports CAN, Funding Summary Report • Set Up HRMS, Product Related, Commitment Accounting, Reports USA, Funding Summary Report	RUNCTL_BUD011
BUD012 FTE Rollup	Run an FTE Rollup report, which provides a detailed listing of total filled and vacant FTE (full time equivalent) counts by department.	• Set Up HRMS, Product Related, Commitment Accounting, Reports, FTE Rollup Report • Set Up HRMS, Product Related, Commitment Accounting, Reports CAN, FTE Rollup Report • Set Up HRMS, Product Related, Commitment Accounting, Reports USA, FTE Rollup Report	RUNCTL_BUD012
BUD020 Retro Distribution	Report on the paychecks that have been modified using retroactive distribution. The report displays the old and the modified check data.	• Set Up HRMS, Product Related, Commitment Accounting, Reports, Retro Distribution Audit Rpt • Set Up HRMS, Product Related, Commitment Accounting, Reports CAN, Retro Distribution Audit Rpt • Set Up HRMS, Product Related, Commitment Accounting, Reports USA, Retro Distribution Audit Rpt	RUNCNTL_BUD020

Report ID and Report Name	Description	Navigation	Run Control Page
HPCA010 Predistribution Audit	The Predistribution Audit report audits payroll and configuration data and identifies any errors that could be encountered when you run the Actuals Distribution or Actuals GL Interface processes. Run the Predistribution Audit report after you've run the Paysheet Create process, but before running the Actuals Distribution process.	- North American Payroll, Payroll Distribution, Commitment Accounting CAN, Predistribution Audit Rpt - North American Payroll, Payroll Distribution, Commitment Accounting, Predistribution Audit Rpt	HP_RUNCTL_PDAUDIT
HPCA012 Fringe and Gross Report	Reports on the Pay Check Distribution records. Run after you've completed the Pay Check distribution process. You must set up column definitions and run the Fringe Gross Load process before running the Fringe and Gross report.	North American Payroll, Payroll Distribution, GL Interface Reports, Gross and Fringe	HP_RCTL_GRSFR_RPT

Track Faculty Events Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HRH905CN StatsCan FT Survey (Statistics Canada full-time survey)	Lists the results of the Statistics Canada Academic Teaching Survey created using the Create Stats-Canada Survey component.	Workforce Development, Faculty Events, Load Teaching Data CAN, FT Survey Stats CAN Rpt	RUNCTL_HPH905CN
PER045 Faculty Events	Lists an employee's tracking events, such as activities. Use this report as a template for Curriculum Vitae reporting.	Workforce Development, Faculty Events, Track Events, Faculty Events Hist Rpt, Faculty Events Report	RUNCTL_EVENTS
PER046 Case Review	Captures the case review details and the less secure details of the case review path.	Workforce Development, Faculty Events, Manage Cases, Case Review Status Rpt, Case Review Report	RUNCTL_CASE_REVIEW
PER047 Employee Tenure Status	Lists employee tenure status and home department information.	Workforce Development, Faculty Events, Tenure Reports, Employee Tenure Status	RUNCTL_EGPP03

Report ID and Report Name	Description	Navigation	Run Control Page
PER050 Tenure Calc (tenure calculation)	Lists the calculated tenure service information in the temporary calculation file created using the Tenure Calc process in Normal Run mode. Before using this report, you must run the tenure calculation process at least once. You can run this report based on calculation name, or based on the business unit, department, and service calculation group. Administer Flexible Service also uses this report.	Workforce Development, Faculty Events, Tenure Reports, Tenure Calculation, Tenure Calc	RUNCTL_EGPP05
PER051 Tenure Service List	Provides detailed tenure service information for employees, such as tenure status and track start date. With this report, you can list employees by calculation group and within tenure service accruals between specific years. You can also sort by ascending or descending service time.	Workforce Development, Faculty Events, Tenure Reports, Tenure Years of Service, Tenure Service List	RUNCTL_EGPP06

Administer Company Cars Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CAR003 Car List	Produce a list of cars in the company's fleet and list basic information.	Benefits, Provide Company Cars, Create List of Cars	PRCSRUNCNTL
CAR002 Print P11D Section A	Print the results from the CAR001 process in a format similar to the UK government form P11D. Before using this page, you must have run the CAR001 report process.	Benefits, Provide Company Cars, Print P11D Information	RUNCTL_COMPCAR001

Manage Competencies Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMM007 Licenses, Certificates Renewal	Lists which employees need to renew a license or certificate. Note. This report from the PeopleSoft Human Resources Manage Competencies business process is also available on the Administer Training menu: PER703 Course Table.	Workforce Development, Competency Management, Track Person Competencies, Licenses/Certificate Renewal	RUNCTL_CMM007
NVQ001 (GBR) UK NVQ - Employee Status	Lists employees assigned to an NVQ and their status.	Workforce Development, Competency Management, NVQ Reports, Employee Status	PRCSRUNCNTL
NVQ002 (GBR) UK NVQ - Unit Listing	Lists all defined NVQ units.	Workforce Development, Competency Management, NVQ Reports, Unit Listing	PRCSRUNCNTL
NVQ003 (GBR) UK NVQ - NVQ Listing	Lists all defined NVQ units.	Workforce Development, Competency Management, NVQ Reports, NVQ Listing	PRCSRUNCNTL
NVQ004 (GBR) UK NVQ – Unit/Element Listing	Lists the elements associated with NVQ units.	Workforce Development, Competency Management, NVQ Reports Unit/Element	PRCSRUNCNTL
NVQ006 (GBR) UK NVQ - Employee Plan	Summarizes an employee's NVQ Unit plan (defined on the Track NVQ - Plan NVQ Units page). First run the NVQ - Initialize Plan process to generate this report.	Workforce Development, Competency Management, NVQ Reports, Employee Plan	PRCSRUNCNTL
PER011 Competency Inventory	Lists employees in a department and their competencies. Run the Refresh Employees Table process before running this report to include any new employees and their associated competencies. Use the same Run Control ID for both the Refresh Employee Table process and the Competency Inventory report.	Workforce Development, Competency Management, Track Person Competencies, Competency Inventory	RUNCTL_PER011
PER537 Competency Listing	Lists competency types and the competencies associated with each type; also lists descriptions and categories.	Set Up HRMS, Common Definitions, Competencies, Competency Listing	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
PER538 Accomplishment Listing	Lists all defined accomplishments. Does not include National Vocational Qualifications (NVQs) for the UK.	Set Up HRMS, Common Definitions, Accomplishments, Accomplishment Listing	RUNCTL_PER538

Manage Positions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR009 (USF) Job Code/Position Audit	Cross references position numbers and job codes. (SQR)	Organizational Development, Position Management, Position Reports, Job Code/Position Audit	RUNCTL_FGASOFDT
FGHR010 (USF) Vacant Position	Lists all currently vacant, budgeted positions in your organization. (Crystal)	Organizational Development, Position Management, Position Reports, Vacant Position USF	RUNCTL_FGHR010
FGHR025 (USF) Active/Inactive Position	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Organizational Development, Position Management, Position Reports, Active/Inactive Positions USF	RUNCTL_FGHR025
FGHR026 (USF) Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Organizational Development, Position Management, Position Reports, Incumbent History USF	RUNCTL_FGASOFDT
FGHR027 (USF) Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Organizational Development, Position Management, Position Reports, Active Position History USF	RUNCTL_FGASOFDT
FGHR028 (USF) Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Organizational Development, Position Management, Position Reports, Exception Override USF	RUNCTL_FGHR028
FGOCC800 (USF) Occupation Series	Provides the details of the Occupational Series table. (Crystal)	Organizational Development, Position Management, Position Reports, Occupation Series USF	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FGOF8 (USF) OF8 Report	This optional form provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.	Organizational Development, Position Management, Position Reports, OF8 Report USF	RUNCTL_FGOF8
FGPER815 (USF) Position Title Table	Generates a listing of the Position Title Table records. (Crystal)	Organizational Development, Position Management, Position Reports, Position Title Table USF	PRCSRUNCNTL
FGPER823 (USF) Job Code	Print a list of all the job codes with effective dates.	Organizational Development, Position Management, Position Reports, Job Code USF	PRCSRUNCNTL
POS001 Position Status	Inventories the types of positions in your organization, and lists all filled and vacant positions. (SQR)	Organizational Development, Position Management, Position Reports, Position Status	RUNCTL_ASOFDATE
POS002 Active/Inactive Positions	Lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)	Organizational Development, Position Management, Position Reports, Active/Inactive Positions	RUNCTL_POS002
POS003 Incumbent History	Lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)	Organizational Development, Position Management, Position Reports, Incumbent History	RUNCTL_ASOFDT_COMP
POS004 Active Position History	Lists all current and historical data related to a position, for all active positions in the organization. (SQR)	Organizational Development, Position Management, Position Reports, Active Position History	RUNCTL_ASOFDATE

Report ID and Report Name	Description	Navigation	Run Control Page
POS006 Create Organizational Report	Provides a visual representation of reporting relationships among positions by level, if any, in the organization. (SQR) Before you can run this report, you must run the utility Build Position Structure, which links the positions in the system and creates the reporting hierarchy represented in this report.	Organizational Development, Position Management, Create Organizational Structure, Create Organizational Report	RUNCTL_POS006
POS006A Build Position Structure	Links the positions in the system and creates the reporting hierarchy represented in the Create Organizational Report. (SQR)	Organizational Development, Position Management, Create Organizational Structure, Build Position Structure	RUNCTL_ASOFDATA
POS007 Vacant Position	Lists all currently vacant, budgeted positions in your organization. (Crystal)	Organizational Development, Position Management, Position Reports, Vacant Position	PRCSRUNCNTL
POS008 Exception/Override	Audits the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)	Organizational Development, Position Management, Position Reports, Exception/Override	RUNCTL_POS008

Manage Professional Compliance Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PCMP002 Compliance Plan	Provides complete details of a company's compliance plan.	Workforce Monitoring, Professional Compliance, Reports, Compliance Plans	RUN_CNTL_PCMP2
PCMP003 RI Observation	Provides complete details of a regulated individual observation.	Workforce Monitoring, Professional Compliance, Reports, RI Observation	RUN_CNTL_PCMP3
PCMP004 RI Review	Provides complete details of a regulated individual review.	Workforce Monitoring, Professional Compliance, Reports, RI Review	RUN_CNTL_PCMP4

Administer Salary Packaging Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PKG003 Packages Due for Review	Displays all employees with packages ready for review.	Compensation, Salary Packaging AUS, Create Packaging Reports, Packages Due For Review	RUNCTL_PKG003
PKG004 Package Model	Enables you to report on an applicant or an employee's salary package. The information contained in the report displays the details from the employee / applicant salary package pages. Both annual and package period amounts for components, additional components, salary, tax and TPV and TEC are displayed.	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Models	RUNCTL_PKG004
PKG006 FBT Reconciliation	Assists in the reporting of benefits and liabilities to the Australian Taxation Office at the end of the Fringe Benefits Tax Year— March 31. The Australian Taxation Office has identified different categories of fringe benefits and each category has its own specific rules for calculating the taxable value.	Compensation, Salary Packaging AUS, Create Packaging Reports, FBT Reconciliation	RUNCTL_PKG006
PKG007 Package Details	Reports on the amounts budgeted for each component of a package in each pay period. The report, run on an employee only basis, requires a start and end date of the period of time you wish to report on.	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Details	RUNCTL_PKG007

Manage Variable Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
VC001 Actual Award Report	Run the Actual Awards report after the system publishes the awards for payout. This report shows any modifications that you made to the award on the Award Allocations page.	Compensation, Variable Compensation, Award Reports, Actual Award Report	RUNCTL_VC_REP
VC002 Budget Report	Helps you calculate how much funding to allocate to a plan.	Compensation, Variable Compensation, Variable Comp Reports, Budget	RUNCTL_VC_REP

Report ID and Report Name	Description	Navigation	Run Control Page
VC003 Calculate Awards Report	View the results of the Award Calculation process.	Compensation, Variable Compensation, Award Reports, Calculate Awards	RUNCTL_VC_REP
VC004 Carryover Report	View the carryover balances. The detailed report lists all employees in a plan by group and their carryover balances. The summary report lists the total carryover balance for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Award Reports, Carryovers	RUNCTL_VC_REP
VC005 Employee History Report	For each employee, the report lists target values, award values, and units by plan and payout period. It also prints the total values and units for each plan. In addition, select to print each employee's grand total values for all plans.	Compensation, Variable Compensation, Award Reports, Employee History	RUNCTL_VC_EEHIS_RP
VC006 Funding Allocation Report	After you allocate funds to groups, use the optional Funding Allocations report to review and evaluate the distribution of funds to all of the groups in the plan. The report lists all data as summary information at the group level.	Compensation, Variable Compensation, Variable Comp Reports, Funds Allocation	RUNCTL_VC_REP
VC007 Guarantee Report	View the employee guarantees. The detailed report lists all employees in a plan by group and their guarantees. The summary report lists the total guarantees for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Variable Comp Reports, Guarantee	RUNCTL_VC_REP

Report ID and Report Name	Description	Navigation	Run Control Page
VC008 Non Monetary Report	Track the number of units awarded under a plan and the value to employees. The report lists only awards that are beyond the status of Initial Calculation. The detailed report lists all employees in a plan by group, their target values, their calculated awards, their actual award in non-monetary units, and their actual awards as a monetary value. The summary report lists the total non-monetary units for each group, as well as the totals for the plan.	Compensation, Variable Compensation, Award Reports, Non Monetary	RUNCTL_VC_REP
VC009 Plan History Report	The report provides information about the plan definition and lists award values, proration, and approver information by payout period for the plan ID that you specify on the run control page.	Compensation, Variable Compensation, Award Reports, Plan History	RUNCTL_VC_REP
VC010 Variance Report	View the variance between the target award and the actual award that appears on the Award Allocations page. The detailed report lists all employees in a plan by group, the employee's target award value, actual award value, and variance between the target and actual award. It also indicates whether the award is either the minimum or maximum payout under the plan. In addition, this report shows the total target award value, actual award value, and variance for each group and the grand total for the plan. The summary report lists the total target award value, actual award value, and variance for each group, as well as the grand totals for the plan.	Compensation, Variable Compensation, Award Reports, Variance	RUNCTL_VC_REP

Report ID and Report Name	Description	Navigation	Run Control Page
VC011 Organization and Group Goals Report	Provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.	Compensation, Variable Compensation, Variable Comp Reports, Organization and Group Goals	RUNCTL_VC_REP
VC012 Consistency Report	Provides a list of employees who have fallen off a tree and the groups to which they belonged. The variable compensation administrator or the employees' managers can use this information to ensure that these individuals get the appropriate awards.	Compensation, Variable Compensation, Variable Comp Reports, Tree Consistency Report	RUNCTL_VC_REP
VC013 Subscription Error Report	Run the Subscription Error report after receiving workflow email notification that an erred or rejected award has been returned from PeopleSoft Payroll for North America or PeopleSoft Stock Administration.	Compensation, Variable Compensation, Award Reports, Subscription Errors	RUNCTL_VC_REP
VCP001 Tree Member Overlap Report	Identifies employees who exist multiple times on a tree. This enables you to validate or correct the group membership, as appropriate.	Compensation, Variable Compensation, Variable Comp Reports, Tree Member Overlap	RUNCTL_VCP001

Manage French Public Sector Reports

Report ID and Report Name	Description	Navigation	Run Control Page
FP_PROM Promotable Employees	Lists the employees promotable by a given date. To be launched after the FPA800 SQR.	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Promotable Employees Report	RUNCTL_FPAPROM
FPA_CARB Career Simulation	Lists the simulated career data after reclassification or simulation of step increment.	Workforce Administration, Collective Processes, Manage Advancement FPS, Career Simulation Report	RUNCTL_FPACRYSTAL3
FPA025 Rating	Lists employees that have been evaluated and those who have not.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Evaluation Status FPS	RUNCTL_FPA025

Report ID and Report Name	Description	Navigation	Run Control Page
FPA030 Adjustment Constant	Calculates and reports the adjustment constant per reviewer in a given corps	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Calc Adjustment Constant FPS	RUNCTL_FPA030
FPA110 Edit Individual Orders	Edits all individual orders for a period, status and action code.	Workforce Administration, Workforce Reports, Individual Orders Edit FPS	RUNCTL_FPA110J
FPA110 Edit Collective Orders	Edits all collective orders for a period, status and action code.	Workforce Administration, Workforce Reports, Collective Orders FPS	RUNCTL_FPA110C
FPA115 Collective Order Number Updating	Attributes a number to collective orders.	Workforce Administration, Workforce Reports, Collective Order Updates FPS	RUNCTL_FPA115
FPA400 Part-Time Schedule	Lists part-time employees, whose part-time will end soon	Workforce Administration, Workforce Reports, Part-Time Schedule FPS	RUNCTL_FROMTHRU
FPA405 Current PPd Schedule	Lists employees nearing the end of their probation period.	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Current Probation Schedule Rpt	RUNCTL_FROMTHRU
FPA-AFFE Assignment – Request tbc	Lists requests for assignment changes that need to be approved	Workforce Administration, Workforce Reports, Assignment – Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA-CARR Career-Request tbc	Lists requests for career changes that need to be approved	Workforce Administration, Workforce Reports, Career – Request tbc FPS	RUNCTL_FPACRYSTAL1
FPACNTR Contribution Call Letters	Contribution call letters contain the employee's address and the contribution amounts. Launch this report after FPA1100 SQR.	Workforce Administration, Collective Processes, Contribution Call Letter FPS	RUNCTL_FPA1150
FPACNTR2 Contribution Call Letters	See above.	Workforce Administration, Collective Processes, Contribution Call Letter FPS	RUNCTL_FPA1150
FPAEE_CA Employee Career/Action	Lists employee career data.	Administer Workforce, Report (FPS), Report-FP, Employee Career/Action	RUNCTL_FPACRYSTAL2
FPAEE_PO CSPosition/Employee	Lists employee civil service position data	Workforce Administration, Job Information, Reports, Employee Career/Action FPS	RUNCTL_FPACRYSTAL2
FPAHISTA Assignment – Request Rejected	Lists rejected assignment change requests.	Workforce Administration, Workforce Reports, Assignment – Rqst Rejected FPS	RUNCTL_FPACRYSTAL1
FPAHISTC Career – Request Rejected	Lists rejected career change requests.	Workforce Administration, Workforce Reports, Career – Request Rejected FPS	RUNCTL_FPACRYSTAL1

Report ID and Report Name	Description	Navigation	Run Control Page
FPAHISTP CSPosition – Request Rejected	Lists rejected civil service position requests.	Workforce Administration, Workforce Reports, CSPosition – Rqst Reject FPS	RUNCTL_FPACRYSTAL1
FPAHISTS Compensation – Request Rejected	Lists rejected compensation change requests.	Workforce Administration, Workforce Reports, Compensation – Rqst Reject FPS	RUNCTL_FPACRYSTAL1
FPAHISTW Work Time – Request Rejected	Lists rejected work time change requests.	Workforce Administration, Workforce Reports, Work Time – Rqst Rejected FPS	RUNCTL_FPACRYSTAL1
FPA-POSI CS Position tbc	Lists civil service change requests requiring approval.	Workforce Administration, Workforce Reports, CS Position Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA_RAT List of Employees to be Rated (employee ID)	Lists employees to be rated according to attendance time, sorted by department or grade. Launch this report after FPA1200 SQR.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	RUNCTL_FPA1210
FPARAT2 List of Employees to be Rated (employee/department list)	See above.	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	RUNCTL_FPA1210
FPA-REMU Compensation – Request tbc	Lists compensation change requests requiring approval.	Workforce Administration, Workforce Reports, Compensation – Request tbc FPS	RUNCTL_FPACRYSTAL1
FPA-TDTR Work Time – Request tbc	Lists work time change requests requiring approval.	Workforce Administration, Workforce Reports, Work Time – Request tbc FPS	RUNCTL_FPACRYSTAL1
FPMACT1 Action List – Report 1	Lists action definition part 1.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List – Report 1	PRCSRUNCNTL
FPMACT2 Action List – Report 2	Lists action definition part 2.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List – Report 2	PRCSRUNCNTL
FPMACTLE Actions/CS Position	Lists actions authorized by civil service position.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/CS Position	PRCSRUNCNTL
FPMACTPR Retro Pres Action Rules	Lists the retroactivity rules for action codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Retro Pres Action Rules	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
FPMACTST Actions/Status	Lists actions authorized by status.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/Status	PRCSRUNCNTL
FPMBUISN Occupation	Lists occupation codes.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Occupation	PRCSRUNCNTL
FPMCORPS Corps	Lists corps definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Corps	PRCSRUNCNTL
FPMINDEX Index Value	Lists index/amount values.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Index Value	PRCSRUNCNTL
FPMJOB CD Job Code	Lists job code definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Job Code	PRCSRUNCNTL
FPMLEGAL Civil Service Position	Lists civil service position definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Civil Service Position	PRCSRUNCNTL
FPMPOINT Type of Point	Lists type of point definitions.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Type of Point	PRCSRUNCNTL
FPMRANK1 Grade List – Report 1	Lists grade definition part 1.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List – Report 1	PRCSRUNCNTL
FPMRANK2 Grade List – Report 2	List grade definition part 2.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List – Report 2	PRCSRUNCNTL
FPM SALST Sal Grade Table/Scale-Steps	Lists salary grade table – steps.	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Sal Grade Table/Scale-Steps	PRCSRUNCNTL

French Profit Sharing Reports

Report ID and Report Name	Description	Navigation	Run Control Page
WP0001FR Individual Report	Provides employees with details of their profit sharing amount when these are calculated, or when an employee leaves the organization. This report can be delivered with the employee's payslip.	Compensation, Profit Sharing FRA, Manage Profit Sharing, Individual Report	RUNCTL_WP_IND_RPT
WP0002FR Agreement Report	This report is for administrators and lists all the employees that are eligible for a selected agreement and includes the status of the employees' funds, gross and net profit sharing amount, deductions, and investment method.	Compensation, Profit Sharing FRA, Manage Profit Sharing, Agreement Report	RUNCTL_WP_AGRT_RPT

Meet Regulatory Requirements Reports

Report ID and Report Name	Description	Navigation	Run Control Page
APP001 Adverse Impact	Provides information on recruitment and hiring practices; compares hiring decisions for white males to ethnic minorities and females. This report includes only those individuals for whom the applicable job actions were recorded during the date range you specify on the Adverse Impact page.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Adverse Impact	RUN_CNTL_REG
APP002 Job Group Movement Analysis	Provides gender and ethnic group movements in and out of an organization and tracks career progression patterns.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Movement Analysis	RUN_CNTL_REG
OHS001 OSHA-200 Log	Lists the case numbers and details of each injury and illness that occurred during a particular calendar year.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Regulatory Reports, OSHA-200 Log	RUNCTL_CALEDARYR

Report ID and Report Name	Description	Navigation	Run Control Page
PER016 EEO-1 Employer Information	Provides equal employment opportunity (EEO) information on private organizations. This report is compliant with the EEOC requirements for single and multi-establishment reporting. A single-establishment employer needs to file one report, while a multi-establishment employer must file separate reports.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Employer Info	RUNCTL_PER016
PER017 EEO-1 Job Analysis	Supplies standard job category counts instead of employee counts for the private sector.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Job Analysis Report	RUNCTL_PER017
PER019 Terminations Analysis	Analyzes terminations within your organization according to predetermined groupings of age, years of service, gender, and ethnic group. It counts employees in each group, counts terminations, and expresses both counts as a percentage of the total population of active employees. It also calculates the termination rate. This report does not include employees whose Sex or Ethnic Group has not been indicated.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Terminations Analysis	RUN_CNTL_REG
PER022 EEO-5 Job Analysis	Supplies standard job category counts for school-related categories.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-5 Job Analysis	RUNCTL_ASOFDATE
PER024 Job Group Analysis	Analyzes the makeup of your workforce by establishment, EEO job group, job title, and salary grade. For a given job title and salary grade, the report provides totals by minorities, by gender, and by ethnicity within gender. Use this information to examine job groupings in relation to your company structure and to make changes and additions as needed.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis	RUN_CNTL_REG2

Report ID and Report Name	Description	Navigation	Run Control Page
PER024A Job Group Analysis Summary	Analyzes the makeup of your workforce by job groups within each establishment. These totals are further broken down by minority and gender, and then by ethnicity within each gender.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis Summary	RUN_CNTL_REG2
PER025 Workforce Analysis	Tracks hiring practices by department based on job titles, including the salary grade assigned to the title and the total number of employees and minorities who hold the title. Use the report to analyze patterns of discrimination in hiring practices. The report shows the percentage of minorities in each department.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Workforce Analysis	RUN_CNTL_REG2
PER027 VETS-100 Process	The report details the number of special disabled veterans, Vietnam-era veterans, and other protected veterans in your workforce by job category and hiring location, as well as the total number of employees, special disabled veterans, Vietnam-era veterans, and other protected veterans hired during the reporting period.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Process	RUNCTL_PER027
PER027B VETS-100 Analysis	Reports on the VETS-100 data created by the VETS-100 process.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Analysis	RUNCTL_PER027C
PER027C Vets-100 Submit	Creates the digital file for submission to the government. You must run the VETS-100 Process before running this report.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Submit	RUNCTL_PER027C
PER030 Job Group Roster	Lists personal and job data for employees such as ethnic group, gender, date they received the title, salary grade, hourly rate, monthly rate, department name, original hire date and job title at hire. Employees are grouped by their associated job group and establishment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Roster	RUN_CNTL_REG2

Report ID and Report Name	Description	Navigation	Run Control Page
PER031 EEO-4 State and Local Government	Provides employment counts in the prescribed format for state and local governments.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-4 State/Local Govt	RUNCTL_PER031
PER036 PRWORA - New Hire	This report provides the information employers furnish to the Federal Directory of New Hires after hiring a new employee.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA - New Hire, FEDERAL PRWORA - New Hire	RUNCTL_PER036
PER036S PRWORA - New Hire	Provides the information employers furnish to the State Directory of New Hires after hiring a new employee.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA - New Hire, STATE PRWORA - New Hire	RUNCTL_PER036_S
PER040 IPEDS-S	The IPEDS-S (Fall Staff Survey) report is a mandatory report for U.S. higher education institutions that receive funding from a U.S. Federal government program. The report is divided into separate parts for different types of employee: full-time faculty members, other full-time employees, part-time employees, and new hires.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, IPEDS-S	RUNCTL_PER040

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(USA) Meeting Regulatory Requirements for the United States”

(AUS) Meet Regulatory Requirements Reports for Australia

Report ID and Report Name	Description	Navigation	Run Control Page
PER712AUS ASCO	Prints a list of the ASCO reporting codes.	Workforce Monitoring, Meet Regulatory Rqmts AUS, ASCO Report	PRCSRUNCNTL

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(AUS) Meeting Regulatory Requirements for Australia”

(BRA) Meet Regulatory Requirements Reports for Brazil

Report ID and Report Name	Description	Navigation	Run Control Page
BRCGED01 CAGED Report	The CAGED (<i>Cadastro Geral de Empregados e Desempregados</i>) report generates a file containing the monthly turnover of employees by establishment. Every establishment that has had any type of turnover (hiring, dismissing, or transferring employee that have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.	Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA	CAGED_RC_BRA
BREREG01 Employee Registry	The Employee Registry report generates a file containing employees' employment data, including hire date, retirement date, length of social security contributions.	Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA	EMPL_REG_RC_BRA

(CAN) Meet Regulatory Requirements Reports for Canada

Report ID and Report Name	Description	Navigation	Run Control Page
PER101CN Employment Equity	Creates an interface file to export to Canadian Employment Equity software. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Employment Equity	RUNCTL_PER101CN
PER102CN Canadian Official Languages Data File	Creates an import file to report official languages information. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Official Language Requirements	RUNCNTL_PER102CN
PER715CN Pay Equity Table	Lists job evaluation information. (Crystal)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Pay Equity Table	PRCSRUNCNTL
PER716CN National Occupation Codes	Lists the NOC codes used in categorizing your job codes. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, National Occupation Codes	PRCSRUNCNTL

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(CAN) Meeting Regulatory Requirements for Canada”

(FRA) Meet Regulatory Requirements Reports for France

Report ID and Report Name	Description	Navigation	Run Control Page
DIS001 Disability	Calculate the theoretical number of disabled employees who should work for the company and list the disabled employees, excluding temporary workers, trainees, and apprentices. For companies with more than 20 employees. (SQR) Before running this report, enter the correct codes in the INSEE (National Institute for Statistic and Economic Studies) Table and the correct Disability Rate code in the External Variables Table.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Disability	RUNCTL_DIS001_FRA
ELE001 Election	Provides the results of the staff representative elections for employees and management. (Crystal)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Election Report	RUNCTL_ELE001
REG004FR BIAF report	This statutory report is for employees on fixed-term contracts and details the employee's training entitlement.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, BIAF	RUNCTL_BIAF_FRA
HRSHSFRA Single Hiring Statement	A statutory report that is filed at the time of hiring new employees. The system uses information from your employee, company, and establishment tables to generate the report.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Single Hiring Statement	SHS_FRA_RUN_CTL
REG001FR Monthly Workforce	Lists the monthly personnel changes for a given establishment of a company. This report is required for all organizations that employ 50 or more employees. (SQR) Before running this report, define which contract types to include in the report using the Contract Type Group page.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Monthly Workforce	RUNCTL_REG001_FRA

Report ID and Report Name	Description	Navigation	Run Control Page
REG002FR Personal Register	Lists employees for a given establishment of a company. Run the report for a specific establishment within an organization or for all the establishments or an organization. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Personal Register	RUNCTL_REG002_FRA
REG003FR Workforce by Nationality	Provides a comprehensive analysis of the foreign workforce employed in a company. (SQR)	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Workforce by Nationality	RUNCTL_REG003_FRA
SOC001 Employee Survey	Gives an annual snapshot of a company based on the calculation of several indicators, such as the number of employees in the organization and their average salary. (Crystal) Before running this report, run the process to calculate the Employee Survey indicators using the Compute Employee Survey – Employee Survey Parameters Page. Check the results of the calculation and update them on the Edit Employee Survey Page.	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Employee Survey Report	RUNCTL_SOC001

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(FRA) Meeting Regulatory Requirements for France”

(GBR) Meet Regulatory Requirements Reports for the UK

Report ID and Report Name	Description	Navigation	Run Control Page
APP001UK Adverse Impact	Displays the breakdown of job offers versus applications by UK-specific ethnic groups and by gender.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Adverse Impact	RUNCTL_FROMTHRU
PER019UK Termination Analysis	Displays the current employee count and the number of terminations.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Termination Analysis	RUNCTL_FROMTHRU
PER025UK Work Force Analysis	Tracks hiring practices by department, or other organizational units, based on job titles in the department.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Workforce Analysis	RUNCTL_PER025UK

Report ID and Report Name	Description	Navigation	Run Control Page
PER030UK Job Group Roster	Lists your employees in job groups.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Job Group Roster	RUNCTL_PER030UK
PER037UK Joint Staffing	Gives a breakdown of your workforce by job code, gender, and full or part-time status.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Joint Staffing	RUNCTL_ASOFDATE
UKNI001 Northern Ireland	Indicates the religious composition of the workforce, job applicants, and appointees. The report format emulates the Monitoring Return, which is required by organizations operating in Northern Ireland.	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, NI Fair Employments	RUNCTL_UKNI

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(GBR) Meeting Regulatory Requirements for the United Kingdom”

(USF) Meet Regulatory Requirements Reports for the US Federal Government

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR012A EEO Groups by PATCOB/POI	Details the distribution of equal employment opportunity (EEO) groups and comparison by PATCOB and POI.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by PATCOB/POI USF	RUNCTL_FGHR012
FGHR012B EEO Groups by PATCOB/SubAgency	Details the distribution of EEO groups and comparison by PATCOB and sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by PATCOB/SubAgcy USF	RUNCTL_FGHR012
FGHR013A VETS-100 by SubAgency	Generates a Veterans employment report by sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by SubAgency USF	RUNCTL_FGHR013
FGHR013B VETS-100 by POI	Generates a Veterans employment report by POI.	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 by POI USF	RUNCTL_FGHR013
FGHR014A EEO Groups by Series/POI	Details the distribution of EEO groups and comparison by occupation and POI.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by Series/POI USF	RUNCTL_FGHR014

Report ID and Report Name	Description	Navigation	Run Control Page
FGHR014B EEO Groups by Series/SubAgency	Details the distribution of EEO groups and comparison by series and sub-agency.	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by Series/SubAgcy USF	RUNCTL_FGHR014
FGHR019B CPDF Error	Lists the CPDF edit errors found in CPDF Error Processing. Before running this report, run CPDF Edits Processing to execute the COBOL program FGPCPDF. This program generates a table of the CPDF edit errors found in the CPDF Status and Dynamic Tables.	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Error Report	RUNCTL_FGHR019B
FGSF113A SF113-A	Generates a monthly report of federal civilian employment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-A USF	RUN_FGSF113A
FGSF113G SF113-G	Generates a monthly report of full-time equivalent and work-year civilian employment.	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-G USF	RUN_FGSF113G

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(USF) Performing Central Personnel Data File Edit Processing”

Monitor Absence Reports

Report ID and Report Name	Description	Navigation	Run Control Page
ABS001 Absence Listing	Provides information about an employee’s absence history. Note. Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Absence Listing	RUNCTL_ABS001
ABS002 Absence Periods	Provides information about the number of employee absence periods.	Workforce Administration, Absence and Vacation, Absence Reports, Absence Periods	RUNCTL_ABS001
ABS003 Time Lost Due to Absence	Provides employee absence information. Note. Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Time Lost Due to Absence	RUNCTL_ABS003

Report ID and Report Name	Description	Navigation	Run Control Page
ABS004UK Bradford Score	Lists employee absences for the regulatory region of GBR only. It lists department, employee name, employee ID, employee type, job title, total number of absences, total number of days absent, and the Bradford Score. The Bradford Score column of this report is calculated based on the following information: • Total number of absences (A) • Total number of days absent (B) • $A^2 \times B$ Note. Run the Refresh Employees Table process before running this report.	Workforce Administration, Absence and Vacation, Absence Reports, Bradford Score GBR	RUNCTL_ABS004UK
ABS005NL Illness Registration (1)	Calculates the illness totals, percentages, and frequencies.	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD	RUNCTL_ABS005_NL
ABS006NL Illness Registration (2)	Same as above.	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD	RUNCTL_ABS005_NL
ABS007NL Longterm Illnesses NLD	Provides a report of employees who have longterm illnesses from which they haven't fully recovered and are subject to the Dutch law <i>Wet Poortwachter</i>. You can use an employee checklist to track the status of an employee's illness. Note. This report can be run from PeopleSoft Human Resources or Global Payroll for the Netherlands. Based on the setting of the GPNLD installation flag, the report retrieves absence data from human resources or payroll tables.	• Workforce Administration, Absence and Vacation, Absence Reports, Longterm Illnesses NLD • Global Payroll, Absence and Payroll Processing, Absence Reports, Longterm Illnesses NLD	RUNCTL_ABS007_NL

Monitor Health and Safety Reports

Report ID and Report Name	Description	Navigation	Run Control Page
OHS001CN Workers Compensation Board Form 7	Provides some of the information required for provincial WCB Form 7s. Use this report to manually transcribe information to the printed form required by the WCB in most Canadian provinces.	Workforce Monitoring, Health and Safety, Reports, WCB Form 7 CAN	RUNCTL_OHS001CN
OHS001FR Work Accident Report	Tracks information on the employer, the establishment, the casualty, and details of the accident such as witnesses and other third parties. Use this information to complete the official French report.	Workforce Monitoring, Health and Safety, Reports, Work Accident FRA	OHS001FR
OHS001GR Accident Report	Provides information about the person injured, body parts, physician and hospital data, injury source and nature, unsafe acts, hazards, causes, corrective or preventative actions, and witnesses for the incident that you select.	Workforce Monitoring, Health and Safety, Reports, Accident DEU	RUNCTL_OHS001GR
OHS001UK Injury/Dangerous Occurrence	Provides the data about health and safety incidents needed to meet the health and safety reporting requirements in the United Kingdom. (Crystal) Before running the United Kingdom Injury or Dangerous Occurrence report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report. Note. To prepare the injury and dangerous occurrence report, you must first have entered an incident into the system using incident details.	Workforce Monitoring, Health and Safety, Reports, Injury/Dangerous Occ. GBR	RUNCTL_OHS_UK
OHS002GR Reportable Accident/Illness	Produces a Reportable Accident /Illness report for Germany.	Workforce Monitoring, Health and Safety, Reports, Reportable Accident/Illness DEU	RUNCTL_OHS002GR

Report ID and Report Name	Description	Navigation	Run Control Page
OHS002UK Illness Report	Provides information to meet the health and safety reporting requirements in the United Kingdom. (Crystal) Before running the UK Illness report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables. The report output is a Crystal report that exactly duplicates the official report. Once the data in the report is complete, sign and mail it to the HSE (Health and Safety Executive).	Workforce Monitoring, Health and Safety, Reports, Illness GBR	RUNCTL_OHS_UK
OHS003 Non-Employees In Incidents	Summarizes the non-employees involved in incidents that occurred within a specified date range. It notes whether they suffered an illness or injury. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Non-Employees In Incidents	RUNCTL_OHS_FROMTO
OHS003GR Incident Location Summary	Provides information about travel, mode of transportation, details about whether drugs were involved, and details about individuals associated with the incident. This report is available only in German. (SQR)	Workforce Monitoring, Health and Safety, Reports, Incident Location Summ DEU	RUNCTL_OHS003GR
OHS004GR Illness Report	Includes information about the individual, including personal data, nationality, children, job, and physician. To prepare the illness report, you must first enter an illness into the system using the GER Illness Tracking page group. The details of the illness must also be properly entered into the system. Before you run the report, run the SQR process GER Collect Illness Data (OHS504GR) to load the temporary data tables. This report is only available in German. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Illness DEU	RUNCTL_OHS504GR

Report ID and Report Name	Description	Navigation	Run Control Page
OHS008CN Workers Compensation Board Incident	Provides specific incident information required by the Canadian Worker's Compensation Board, such as incident occurrence information, work absence and work resumption, the person responsible, first aid provided, and other information required by the WCB. Use information from this report to manually complete WCB reporting forms. (SQR)	Workforce Monitoring, Health and Safety, Reports, WCB Incident CAN	RUNCTL_OHS_INC
OHS009 Incident Detail	In addition to the occurrence information, the report lists all causes and related corrective actions, witnesses, involved persons (including detailed injury information), OSHA information, lost work, and physician information.	Workforce Monitoring, Health and Safety, Reports, Incident Detail	RUNCTL_OHS_INC
OHS010 Incident Summary	Summarizes health and safety incidents that have occurred within a specified date range. This report lists all involved persons and indicates whether an OSHA report was filed related to a person's involvement. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Summary	RUNCTL_OHS_FROMTO
OHS011 Location Incident Summary	Summarizes the incidents that occurred at specific locations and within the specified date range. The report lists all persons involved in the incident and indicates whether or not they received an OSHA reportable illness or injury. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Location Incident Summary	RUNCTL_OHS_FROMTO
OHS012 Claim Summary Overview	Summarizes claims that have been logged within a specified date range. The report itemizes by amounts within a Charge Type, subtotals by Charge Type, subtotals by claim, and then calculates a grand total of all charges within the reporting period. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Claim Summary Overview	RUNCTL_OHS_FROMTO

Report ID and Report Name	Description	Navigation	Run Control Page
OHS013 Employees In Incidents	Summarizes employees involved in incidents that have occurred within a specified date range. It notes whether the employee has suffered an injury or illness (Crystal)	Workforce Monitoring, Health and Safety, Reports, Employees In Incidents	RUNCTL_OHS_FROMTO
OHS014 Incident Lost Work	Lists the lost or restricted workdays for an employee involved in a health and safety incident within a specified reporting period and totals lost and restricted days by incident. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Lost Work	RUNCTL_OHS_FROMTO
OHS014ESP Incident Without Lost Work	Generates a list of accidents that didn't result in lost workdays. This report prints the Employee Name, Gender, NSS, Accident Date, and Accident Type. This report must be printed by Work Center. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident w/o Lost Wages ESP	RUNCTL_OHS_FROMTO
OHS015 Incident Claim Detail	Lists the claims filed for a specific incident, the employee filing the claim, provider information related to the claim, and detailed charges (by charge type) related to the claim. The report subtotals by charge type within a claim, subtotals by the claim itself, and then provides a grand total of all claim charges for the incident. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Incident Claim Detail	RUNCTL_OHS_INC
OHS016 Vehicle Incident Summary	Summarizes information about vehicles involved in incidents within a specified date range. The report lists the vehicle and equipment information and related information about the people involved. (Crystal)	Workforce Monitoring, Health and Safety, Reports, Vehicle Incident Summary	RUNCTL_OHS_FROMTO
PER002CHE Accident Report	Provides the information required by Swiss law in a format accepted by all Swiss insurance companies. (SQR) Use this report to create an accident report to submit to your organization's insurance company following an accident.	Workforce Monitoring, Health and Safety, Reports, Accident CHE	RUNCTL_PER002_CHE

Plan Careers and Successions Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CARPLAN Employee Career Plan	Lists an employee's career plan as entered by different evaluators (Crystal).	Workforce Development, Career Planning , Career Reports, Career Plan	RUNCTL_CAR001
CARTRAIN Employee Career Training Plan	Lists an employee's training plan to meet career goals (Crystal).	Workforce Development, Career Planning , Career Reports, Career Training	RUNCTL_CAR002
FGHR022 (USF) Individual Development Plan	Produces an Individual Development Plan (IDP) for an employee. (SQR). An IDP includes an employee profile, employee competencies, employee training history, potential job moves, mentoring, training, other specific developmental areas, summary of estimated costs, summary of actual costs, and a section for signatures.	Workforce Development, Career Planning , Career Reports, Individual Development Plan, IDP	RUN_FGHR022
PER034 Internal Resume	Creates a resume-like document from the data contained in PeopleSoft tables. (SQR). Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards.	Recruiting, Identify/Process Applicants, Identify Candidates, Internal Resume	RUNCTL_PER034

Administer Salaries for the Netherlands Reports

Report ID and Report Name	Description	Navigation	Run Control Page
INT001NL Insurance Board Notification	Reports personal data for new employees to the Dutch insurance board.	Workforce Administration, Benefit Information NLD, Reports, Insurance Board Notification	RUNCTL_INT001_NL
INT002NL Insurance Notification	Report to the DNHS (Dutch National Health Service) if an employee's income rises above a certain level.	Workforce Administration, Benefit Information NLD, Reports, Health Insurance Notification	RUNCTL_INT002_NL
INT003NL Pay Groups	Provides an overview of the pay groups entered in the system.	Set Up HRMS, Product Related, Benefits NLD, Reports, Pay Groups	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
INT004NL Earnings	Reviews all the valid earnings codes that you entered into the system , along with the payroll calculation characteristics that you assign to each.	Set Up HRMS, Product Related, Benefits NLD, Reports, Earnings	PRCSRUNCNTL
INT005NL Deductions	Reviews all the valid deduction codes that are entered into the system. The SQR is sorted by plan type, deduction code, and effective date.	Set Up HRMS, Product Related, Benefits NLD, Reports, Deductions	PRCSRUNCNTL
INT006NL General Deduction/Frequency	Shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the employee pay frequency, and any additional flat deduction amounts.	Set Up HRMS, Product Related, Benefits NLD, General Deduction/Frequency	PRCSRUNCNTL

Plan Salaries Reports

Report ID and Report Name	Description	Navigation	Run Control Page
CMP001 Salary Structure	Lists all salary grades in descending order by grade. For each grade, this report lists the annual minimum, midpoint, and maximum amount being paid. The midpoint differential column shows the percent of change between the midpoints in each grade. The report calculates the range spread percentage by dividing the maximum amount by the minimum amount and subtracting 1.0.	Compensation, Salary Planning, Salary Plan Reports, Salary Structure	RUNCTL_ASOFDATA

Report ID and Report Name	Description	Navigation	Run Control Page
CMP002 Job Grading by Evaluation Points	Lists each salary grade in the organization along with salary data for all titles within that grade ordered by the job evaluation point assignment. The report includes all titles within that grade ordered by the job evaluation point assignment. Use the evaluation points to assign value to the responsibilities of each job title in your organization and consequently a compensation value to each salary grade. The report includes salary survey information and associated point ratios and midpoints.	Compensation, Salary Planning, Salary Plan Reports, Job Grading by Evaluation Pts	RUNCTL_ASOFFDATE
CMP003 Compa-Ratio Analysis	The report lists each employee in the salary grade and the midpoint amount of the salaries in that grade. For each employee, the report lists job code, title, name, and department ID. The report displays those employees whose Employee Status is <i>Active</i>, <i>Leave of Absence</i>, <i>Suspended</i>, or <i>Leave with Pay</i>. The last two columns pertain to a compa-ratio calculation for each employee. This means a comparison of the employee's salary to the midpoint amount of the salary grade. If the employee's current rate is the same as the midpoint, the compa-ratio is 1.00 or one hundred percent of the midpoint.	Compensation, Salary Planning, Salary Plan Reports, Ratio Analysis	RUNCTL_ASOFFDATE

Report ID and Report Name	Description	Navigation	Run Control Page
CMP004 Below Minimum Analysis	The Below Minimum Analysis report lists the salary grades containing employees under the minimum, the associated minimum amount, the employee's annual rate, and the amount below both in dollars and as a percentage. The report displays those employees whose Employee Status is <i>Active</i> , <i>Leave of Absence</i> , <i>Suspended</i> , or <i>Leave with Pay</i> .	Compensation, Salary Planning, Salary Plan Reports, Below Minimum Analysis	RUNCTL_ASOFDATA
CMP005 Above Maximum Analysis	For each employee, the report shows the job code and title, name, department ID, the maximum amount, the employee's annual rate, and the amount above maximum both in currency and as a percentage. The report displays those employees whose Employee Status is <i>Active</i> , <i>Leave of Absence</i> , <i>Suspended</i> , or <i>Leave with Pay</i> .	Compensation, Salary Planning, Salary Plan Reports, Above Maximum Analysis	RUNCTL_ASOFDATA
CMP008 Salary Change Mass Update by Salary Plan and Pay Group	Generate this report after running the Update by Salary Plan and Pay Group application engine process. The report displays the employees' previous and new compensation package. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure to run the Update by Sal (salary) Plan and Paygroup process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Sal Plan and Paygroup process run control page.	Compensation, Salary Planning, Salary Plan Administration, Update By Plan/Paygroup	RUNCTL_CMP008

Report ID and Report Name	Description	Navigation	Run Control Page
CMP010 Salary Mass Update by Job Code	Displays changes to the Salary Administration Plan, Grade and Step that will be made to employees' job records before you run the Load Data process (HR_SP_CI) to actually insert new job records. This report displays the employees' previous and new Sal Admin Plan (salary administration plan), Grade, and Step. Generate this report after running the Update by Job Code application engine process. The report displays the employees' previous and new salary administration plan, grade, and step. Run the Load Data process (HR_SP_CI) to load all of the data to the Job Data records. Run this report as the second step in the three-step procedure you follow to run the Update by Job Code process. All three steps are available in the PeopleSoft Process Scheduler when you use the Update by Job Code process run control page.	Compensation, Salary Planning, Salary Plan Administration, Update by Job Code	RUNCTL_CMP010
CMP011 Salary History by Employee	Displays each salary change for an employee during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Compensation, Salary Planning, Compensation Reports, Salary History by Employee	RUNCTL_CMP011
CMP014 Salary History by Group	Provides the salary changes for the employees in a group during a specified time period. For each salary change, it lists the associated job action, effective date, job code and title, salary grade, compensation rate, monetary amount, and percentage of change.	Compensation, Salary Planning, Compensation Reports, Salary History by Group	RUNCTL_CMP014

Report ID and Report Name	Description	Navigation	Run Control Page
CMP020JP (JPN) Salary Simulation	Generates the results of the Salary Increase Simulation process.	Compensation, Salary Planning, Percentage Increase JPN, Salary Simulation Report	RUN_SALREPORT_JPN
LMS001 and LMS002 Forecasted Compensation	Analyzes the impact on the forecasted period of the events defined in the scenario and the variations of the compensation and headcount over the two periods (LMS002: Variations).	Compensate Employees, Forecast Compensation FRA, Process Forecast, Forecasted Compensation Rpt	RUNCTL_LMS_REPORT
LMS003 Scenario Comparison	Compare two scenarios.	Compensate Employees, Forecast Compensation FRA, Process Forecast, Scenario Comparison Rpt	RUNCTL_LMS_REPORT
LMS004 Rate Codes Without Rate Code Class	Provides rate codes that don't have a rate code class attached to them. The Salary Forecasting calculation functions properly only when the rate codes assigned to individuals have an associated class. Check that all components of pay included in the compensation package of an employee have an associated rate code class. Run this report before you run the calculation process.	Compensate Employees, Forecast Compensation FRA, Process Forecast, Rate Codes w/out Class Rpt	RUNCTL_LMS_RATE_CL
PER008 Review Audit	Lists all employee reviews for the employees in a group.	Compensation, Salary Planning, Employee Appraisals History, Review Audit	RUNCTL_PER008
PER012 Departmental Salaries	This report provides an alphabetical list of employees by department, basic job data information, and a breakdown of pay rates for each.	Compensation, Salary Planning, Compensation Reports, Salary History by Department	RUNCTL_ASOFDATA_LC
PER013 Employee Compensation Changes	Lists employees who have had compensation rate changes within a selected time period.	Compensation, Salary Planning, Compensation Reports, Employee Compensation Changes	RUNCTL_PER013
PER023 Salary History for Company	Displays each salary change for an employee during a specified time period.	Compensation, Salary Planning, Compensation Reports, Salary History by Company	RUNCTL_PER023
PER041 Merit Increase Report	Lists the merit increases and their approval status for the employees in a merit group.	Compensation, Salary Planning, Merit Increases, Report Merit Increases	RUNCTL_SP_MERIT

Report ID and Report Name	Description	Navigation	Run Control Page
PER062JP (JPN) Grade Advance Candidate List	Lists employees who are eligible to advance from the grade you enter.	Compensation, Salary Planning, Salary Plan Reports, Grade Advance Candidates JPN	RUNCTL_PER062_JPN
PER706A Salary Grade Table	Lists the salary administration plan and salary grade, description, effective date, currency, and the hourly, daily, monthly, annual minimum, maximum, and midpoint rates for each grade.	Compensation, Salary Planning, Salary Plan Reports, Salary Grade	PRCSRUNCNTL
PER706B Salary Grade and Step Tables	Lists the salary plans, grades and steps, the grade description and the date the grade is effective. It shows the hourly, daily, monthly and annual ranges of each component along with the currency and frequency.	Compensation, Salary Planning, Salary Plan Reports, Salary Grade/Step	RUNCTL_PER706B

Recruit Workforce Reports

Report ID and Report Name	Description	Navigation	Run Control Page
APP002 Job Group Movement Analysis	Provides racial and gender demographic data regarding your hiring process. (SQR).	Recruiting, Job Group Movement Report	RUNCTL_FROMTHRU
APP003 Requisition Status	For each job requisition, the report lists job information, requisition status, recruiter, the number of applicants, and expenses information.	Recruiting, Job Requisition/Posting, Requisition Status Report	PRCSRUNCNTL
APP004 Requisition Posting	Extracts job posting data from the database and formats it for merging into Microsoft Word documents. (SQR, Word for Windows).	Recruiting, Job Requisition/Posting, Extract Posting Information	RUNCTL_APP004

Report ID and Report Name	Description	Navigation	Run Control Page
APP005 Candidate Listing	This report combines job requisition information with a list of candidates being interviewed for the position. It groups requisitions by Department ID. (SQR) For each candidate interviewed, the report displays the following: employee ID, name, status in the interview process (active, inactive, hired, withdrawn), last interview step completed, and any offers made.	Recruiting, Identify Candidates, Candidate Listing	PRCSRUNCNTL
APP006 Requisition Cost Analysis	Provides a breakdown of expense types and amounts for each job requisition. (SQR) For each job requisition, the report lists the requisition number, job code, position number, status, title of the position offered, and the recruiter's name. The last two columns contain a breakdown of each type of expense incurred and its monetary amount, including a total by requisition number. A department summary includes an expense total for all requisitions, each expense category, and calculates a department-average cost-per-hire amount.	Recruiting, Job Requisitions/Postings, Requisition Cost Analysis Rpt	PRCSRUNCNTL
APP007 Recruitment Letters	Generate the recruitment letters for applicants that you have tagged with a letter code. (SQR, Word for Windows)	Recruiting, Identify/Process Candidates, Applicant Maintenance, Recruitment Letters	RUNCTL_APP007
APP011 Applicant Sum. by Requisition (applicant summary by requisition)	For each job requisition, this report lists the number of applicants and percentage of total applicants that applied, sorted by source type and specific source. (SQR).	Recruiting, Identify/Process Applicants, Applicant Maintenance, Summarize by Reqstn (requisition)	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
APP012 Applicant Sum. by Source (applicant summary by source)	Lists the number of applicants and percentage of total applicants sorted by source type and specific source (regardless of requisition). (SQR).	Recruiting, Identify/Process Applicants, Applicant Maintenance, Summarize by Source	PRCSRUNCNTL
APP013 Works Council Posting	A Germany-specific report that lists all open job requisitions that are monitored by a specific Works Council. (SQR)	Recruiting, Job Requisitions/Posting, Create WC Posting Report (Work Council)	RUNCTL_APP013
FGHR032 (USF) Full Vacancy Announcement	Generates a hard copy of the full vacancy announcement. This must be run after you have created the USA Jobs Feed. (SQR)	Recruiting, Reports, Full Text Posting USF	GVT_RUNCTL_FULLVAC
FGREC820 (USF) Evaluation of Candidates	Produces three Evaluation of Candidate reports sorted by applicant ID, name, and score. (Crystal)	Recruiting, Identify/Process Applicants, Identify Candidates, Evaluate Candidates USF	RUN_FGREC820
FGREC821 (USF) Certificate of Eligibles	Generates a Certificate of Eligibles report. (Crystal)	Recruiting, Identify/Process Applicants, Identify Candidates, Certificate of Eligibles USF	RUN_FGREC821
PER034 Internal Resume	Produces a summary of job history information for an employee. (SQR). Sections of the report include: employee name and address, prior work history, education, salary history, job performance, training, special projects, competencies, languages, citizenship, visa/work permits, licenses and certificates, professional memberships, and honors and awards	Recruiting, Identify/Process Applicants, Identify Candidates, Internal Resume	RUNCTL_PER034

Report Total Compensation Reports

Report ID and Report Name	Description	Navigation	Run Control Page
TC001 Total Compensation Statement (Benefits Statement)	A listing of all compensation for each individual, designed for distribution to employees.	Compensation, Report Total Compensation, Cube Contents, Total Comp Statement Report	TC_BEN_RUN_CNTL
TC002 Group Summary Compensation	Aggregated information for each individual within a group that you specify.	Compensation, Report Total Compensation, Cube Contents, Group Summary Compensation Rpt	TC_GRP_RUN_CNTL

Report ID and Report Name	Description	Navigation	Run Control Page
TC003 Employee Compensation Report	Detailed information about each compensation type for each individual within a group that you specify.	Compensation, Report Total Compensation, Cube Contents, Group Detail Compensation Rpt	TC_GRP_RUN_CNTL

Track Flexible Service Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER048 Employee Service Listing	Lists employees by calculation group and service type and within specified time periods. Sort by ascending or descending service time.	Workforce Administration, Flexible Service EG, Employee Service Report	RUNCTL_EGPP04
PER049 Employee Service Calculation Results	Lists the results of the Normal Run batch process and includes all employees who have a temporary file (resulting from a process in Normal Run mode) containing details about their accrued service credits.	Workforce Administration, Flexible Service EG, Calculated Service Report	RUNCTL_EGPP05

Track Global Assignments Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PER717 Employees on Assignment	Lists employees on assignment. (Crystal).	Workforce Administration, Global Assignments, Track Assignment, Employees on Assignment Report	RUNCTL_PER717

Manage Base Benefits Reports

Report ID and Report Name	Description	Navigation	Run Control Page
BEN001 Health Plan Participants Rpt	Lists active health plan participants as of a specified date. Useful for determining the number of employees in plan types offered by specific providers.	Benefits, Report, Participation, Health Plan Participants	RUNCTL_ASODATE_BEN
BEN002 Life Insurance Participants Rpt	Lists active life plan participants as of a specified date. Useful for determining the number of employees in plan types offered by specific providers.	Benefits, Report, Participation, Life Insurance	RUNCTL_ASODATE_BEN

Report ID and Report Name	Description	Navigation	Run Control Page
BEN003 Benefit Contributions	Summarizes benefit contributions by employee and employer.	Benefits, Reports, Contributions and Deductions, Benefit Contribution Register	RUNCTL_BEN003
BEN003CN Benefit Contributions Can.	Summarizes benefit contributions by employee and employer for Canadian companies. This report is the same as BEN003.	Benefits, Reports, Contributions and Deductions, CAN-Contribution Register	RUNCTL_BEN003CN
BEN004 Savings Investment Distribution	Lists total deductions and company contributions for employees participating in savings plans with investment allocations. This program also creates an interface file for use by third-party administrators.	Benefits, Report, Participation, Savings Investment Distributn	RUNCTL_BEN004
BEN007 Leave Accruals	This report displays leave accrual information by leave plan and employee. It includes information such as plan year eligibility hours, carryover hours earned year-to-date, hours taken year-to-date, and remaining leave balances.	Benefits, Report, Participation, Leave Accrual	RUNCTL_BEN_LANG
BEN008 Section 415 Compliance Rpt	The report lists employee amounts either over or under the Section 415 limit. It includes: Company, Employee ID, Effective Date, Special Accumulator, Benefit Program, Percent Of Salary, Maximum Benefit Base, and Gross Amount YTD. It also lists the plans that are excluded from and included in the 415 limit, as well as those plans that are limited.	Benefits, Reports, Regulatory and Compliance, Section 415 Compliance	RUNCTL_ASODATE_BEN
BEN009 Section 415 Non-Compliance Rpt	BEN009 reports on employees who have exceeded the Section 415 limits. It includes: Company, Employee ID, Calendar Year and Month, Gross Amount YTD, Effective Date, Earnings Code, Benefit Program, Percent of Salary, and Maximum Benefit Base.	Benefits, Reports, Regulatory and Compliance, Section 415 Noncompliance	RUNCTL_ASODATE_BEN

Report ID and Report Name	Description	Navigation	Run Control Page
BEN020 FMLA Status Report	Displays summary information for requests in the following classes: approaching leave requests, current FMLA leave requests, recently completed FMLA leaves and denied FMLA leave requests. You can use this report to manage the FMLA leave process from beginning to end. A review of this report reveals those employees who will soon be going out on leave; what follow-up is needed to support the leaves; those employees who will soon exhaust their leave entitlement.	Benefits, Track FMLA (Family Medical Lv), Status Report	RUNCTL_BEN020
BEN021 FMLA Payroll Audit	For employees on FMLA leave or who have recently completed leaves, displays employee ID, name, FMLA request number, begin/return dates, job status, payroll earnings during leave period, FMLA hours taken (paid and unpaid, and the total difference between the hours reported as paid by Payroll and those marked as paid in the FMLA system).	Benefits, Track FMLA (Family Medical Lv), Payroll Audit Report	RUNCTL_BEN021
BEN022 BEN023 HIPAA Medical Certificates	BEN022 prints a twelve-month history of a former employee's group health coverage for specified plan types, as specified by the Health Insurance Portability and Accountability Act (HIPAA) of 1996. BEN023 prints a history for a selected dependent. Only plan types with the HIPAA Plan check box selected on the Benefit/Deduction Program Table have HIPAA history displayed on these reports.	Benefits, Reports, Regulatory and Compliance, HIPAA	RUN_CNTL_HIPAA

Report ID and Report Name	Description	Navigation	Run Control Page
BEN040 Billing Statement	Prints a bill for all employees with outstanding balances who are actively enrolled in the Benefits Billing system. Statements report activity from/to dates; activity type, plan type, benefit plan, coverage, amount and due dates. Also included is the total due and total overdue information, with any comments entered on the billing calendar.	Benefits, Benefits Billing, Create Statements, Print Billing Statement	RUNCTL_BEN040
BEN041 Delinquent Acct	Displays charge and payment activity for employees who have failed to keep their payments current in accordance with the terms established on the Benefits Billing Plan Table. You can use this report to determine what participants are delinquent, the number of days past due and the total amount due. You can also use this report to learn what the total number of participants past due, time overdue and the total amount due.	Benefits, Benefits Billing, Reports, Delinquent Accounts	RUNCTL_BEN041
BEN042 Receivable Report	Displays all payment activity, include the amounts paid and how the amounts were applied. You can use this report to verify the dollar amount of payments received from employees. It can also be used to determine how the moneys received were applied. You can also use this report for general ledger reconciliation and auditing.	Benefits, Benefits Billing, Reports, Accounts Receivable	RUNCTL_BEN042

Report ID and Report Name	Description	Navigation	Run Control Page
BEN043 Billing History	Displays all billing account activity for a specific period of time, by employee. Use this report to answer questions from employees regarding their billing accounts. This report can also be used as a tool in troubleshooting and auditing billing activity. System prompts you to specify from and through dates.	Benefits, Benefits Billing, Reports, History Activity	RUNCTL_BEN043
BEN044 Billing Calculation Errors	Lists billing calculation errors.	Benefits, Benefits Billing, Review Processing Results, Calculation Error Report	RUNCTL_BILL_CAL
BEN045 Benefits Billing Audit	Displays employees with open charges and open credits; active enrollments audit; inactive enrollments audit; employees with holds longer than three months; and enrollment holds longer than three months. Use this report to audit billing enrollments that may require follow-up activity. For example, data will only be displayed for employees with open charges and credits when an error condition exists.	Benefits, Benefits Billing, Reports, Billing Audit	RUNCTL_BEN_LANG
BEN050 Primary Jobs Audit	Identifies employees without a record in the Primary Jobs table, employees without a job in the Primary Jobs table, employees without a primary job flag turned on, employees without a primary job indicated for a specific benefit record, and, employees with more than one primary job designated for a specific benefit record number.	Benefits, Maintain Primary Jobs, Create Audit Report	RUNCTL_BEN050
BEN110 Snapshot Premium Report	List employees, their coverage, and premium amounts for specified vendor and plan type.	Benefits, Interface with Providers, Snapshot Premium Report	RUNCTL_BEN102

Report ID and Report Name	Description	Navigation	Run Control Page
BEN141 A/R Interface	The A/R Interface report extracts all charges for a selected billing period and any charge adjustments with posting dates that fall within the billing period. The system will produce a file called BILLAR. The output file BILLAR holds 2 types of records. One holds employee information, the other holds the accounting information for the Benefits Billing charges and charge adjustments. Use this report to report to interface billing charges to an accounts receivable system.	Benefits, Benefits Billing, Billing Interface, Provide Billing to AR	RUNCTL_BILL_CAL
BEN140 Ben Billing Payment Interface	This program reads payment information from a third-party interface file and posts those payments against open accounts. Lists information about Benefits Billing payments processed by the batch interface process. Can be used as an alternate to entering payments through the Payment Entry page. The system applies the payments to the charges by plan type within due date, oldest due date first. The payments are posted as of the posting date on the transaction.	Benefits, Benefits Billing, Billing Interface, Post Payments from File	RUNCTL_BEN_LANG
BEN701 FSA Benefit Table Listing	Lists information in the Flexible Spending Account Table. Use this report to verify that you have correctly updated and made changes to the table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Flexible Spending Account	RUNCTL_BEN_LANG
BEN702 Flat Rate Table	Prints information from the Flat Rate Table, where you define rates to be charged per selected frequency for a particular benefit program/plan.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Flat Rate Table	RUNCTL_ASODATE_BEN
BEN703 Disability Plan Table Listing	Prints information from the Disability Plan Table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Disability Plan	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN704 Age-Graded Rate Table Listing	The Age Coverage Table report lists the effective dates of the rates and rating factors such as age ranges, sex, and smoker/non-smoker by employer and employee for each set of your age-graded rates.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Age Coverage Rate	RUNCTL_ASODATE_BEN
BEN705 Life AD/D Table Listing	Prints information from the Life AD/D Plan Table, including plan type, plan name, benefit plan ID and name, effective date, coverage, flat amount, rating factor, and group code.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Life AD/D Plan Table	RUNCTL_BEN_LANG
BEN707 Savings Plan/ Investment Table	Prints information from the Savings Plan Table, including savings plan type, benefit plan, effective date, employer investment matching option, and the terms of the employee deductions and employer contributions and investment options.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Savings Plan	RUNCTL_BEN_LANG
BEN708 Calculation Rules Tbl Listing	Lists calculation rules information by calculation rule ID.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Calculation Rules	RUNCTL_BEN_LANG
BEN709 Benefit Plan Table Listing	Prints information from the Benefit Plan Table, including effective date, description, provider ID and name, default deduction code and name, and the indicator for non-discrimination testing.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Benefit Plan	RUNCTL_BEN_LANG
BEN710 Leave Plan Table Listing	Prints information from Leave Plan Table page 1, including plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Leave Plan — Basic Attributes	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN710A Leave Plan Table (Svc Rates)	Prints information from Leave Plan Table pages 2 and 3, including each plan type and its name and ID, effective date, service interval, separate service rate values and bonus values, pay versus time, pay at term, term pay percent, negative balances allowed, and individual first year rate values.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Leave Plan-Accrual and Bonus	RUNCTL_BEN_LANG
BEN711 Retirement Plan Table Listing	Lists information from the Retirement Plan Table, where you define retirement plans for the California Public Employees Retirement System (PERS).	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Retirement Plan	RUNCTL_BEN_LANG
BEN713 Benefit Program	Prints information from the Benefit Program Table, including associations between benefit programs and plans, rates, calculation rules, and payroll rules. This report serves as an audit trail for the information defined on the Benefit Program table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Benefit Program	RUNCTL_BEN713
BEN714 Service Rate Table Listing	Prints information about each service rate ID, including effective date, pay frequency, rate per unit, service intervals, total rate, employer portion, and employee portion. This report serves as an audit trail for the information defined on the Service Rate table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Service Rate	RUNCTL_ASODATE_BEN
BEN715 Vacation Buy/Sell Plan Listing	Prints each vacation buy/sell plan type name and ID and its effective date, buy/sell description, earnings type, pay frequency, vacation hours (increments, minimum, and maximum), and the percent of salary and maximum vacation amounts. This report serves as an audit trail for the information defined on the Vacation Buy/Sell table.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Vacation Buy/Sell	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN716CN Pension Plan Table Listing 1	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, special accumulator code, pension plan type, voluntary contributions indicator, credit CPP indicator, RCT registration number, contribution percentage, and the employee and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan–Canada- Basic	RUNCTL_BEN_LANG
BEN717CN Pension Plan Table Listing 2	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan and name, effective date, contribution rate type, the pension rate earnings limit, and the employee and employer percentages for contributions up to YMPE and over YMPE. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan-Canada-Rates	RUNCTL_BEN_LANG

Report ID and Report Name	Description	Navigation	Run Control Page
BEN718CN Pension Plan Table Listing 3	Prints information from the Canadian Pension Plan Table, including plan type and name, benefit plan name and ID, effective date, special accumulator, pension plan type, if voluntary contribution is allowed, pension administration percentage under and over the YMPE, pension administration earnings that are excluded, benefit entitlement ceiling, and the pension administration annual base hours. This report serves as an audit trail for the information defined on the Canadian Pension Plan tables.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Pension Plan-Canada-Limits	RUNCTL_BEN_LANG
BEN720 FMLA Plan Table Listing	Prints information from the FMLA Plan Table, including FMLA calendar type, eligibility criteria, and the annual leave entitlement. This report serves as an audit trail for the information defined on the FMLA Plan table.	Set Up HRMS, Product Related, Base Benefits, FMLA (Family Medical LV), FMLA Plan Table Report	RUNCTL_BEN_LANG
BEN721 Limit Table List.	Prints information from the Limit Table, where you define government regulations that limit the amount that a participant can contribute or receive from a qualified plan. This report serves as an audit trail for the information defined on the Limit table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Limit Table	RUNCTL_ASODATE_BEN
BEN731 Salary Rate Table	Lists information from the Salary Rate Table, where you define a percentage of salary for flexible credit options and deduction calculations. Includes effective dates of the salary percentages for a rate ID. This report serves as an audit trail for the information defined on the Salary Rate table.	Set Up HRMS, Product Related, Base Benefits, Rate/Rule Reports, Salary Rate	RUNCTL_ASODATE_BEN

Report ID and Report Name	Description	Navigation	Run Control Page
BEN733 Base Benefit Audit Report	Summarizes potential employee data error conditions as related to Base Benefits business process. Includes employees without Employment records, employees without Job records, employees under 16 years old, employees with unusual dependents signed up for coverage, employees with spouses (or other dependents) both electing health benefits, employees with overage dependent coverage, and employees with incorrect health plans set up on the Benefit Program Table.	Benefits, Reports, Audits, Base Benefits Consistency Audit	RUNCTL_BEN_LANG
BEN734 Court Orders Audit Report	Lists employees not compliant with court-ordered dependent benefit coverage or minimum spousal coverage.	Benefits, Reports, Audits, Court Ordered Coverage Audit	RUNCTL_BEN734
BEN740 Billing Calendar Table Listing	Use this report to list of generated billing periods. It is also a quick reference for payment due information by billing period. Displays the following information for each billing period: billing period identifier, begin/end dates, payment due date, COBRA payment due date, calculation run (y/n) and statements printed (y/n).	Set Up HRMS, Product Related, Base Benefits, Billing, Calendar Report	RUNCTL_BEN_LANG
CBR001 COBRA Qualify Ltr	Generates letters that display a qualified COBRA participant's terminating health coverage, qualified COBRA coverage, and the response dates by which he or she must return the election or waive request. It also includes an enrollment form.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Initial Letter	RUNCTL_CBR001
CBR002 COBRA Secondary Notification Letter	Generates letters that display information about the extension of COBRA continuation coverage for COBRA participants who have experienced secondary qualifying events.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Secondary Letter	RUNCTL_CBR002

Report ID and Report Name	Description	Navigation	Run Control Page
CBR003 COBRA Termination Letter	Generates letters that inform COBRA participants that their COBRA coverage is about to expire.	Benefits, Administer COBRA Benefits, Terminate COBRA Coverage, Create Termination Letter	RUNCTL_CBR003
CBR004 COBRA Open Enrollment Letter	Provides Open Enrollment forms for COBRA participants.	Benefits, Administer COBRA Benefits, Manage Automated Participation, Create Open Enrollment Letter	RUNCTL_CBR004
CBR005 COBRA Event Summary	Lists all employees for whom a COBRA event occurred, along with the event status.	Benefits, Administer COBRA Benefits, Review Processing Results, Event Summary Report	RUNCTL_CBR005
CBR006 COBRA Enrollment	Lists all COBRA participants and their current elections, including coverage begin dates.	Benefits, Administer COBRA Benefits, Review Processing Results, Enrollment Report	RUNCTL_CBR006
CBR007 COBRA Audit	Displays active employees enrolled in COBRA health coverage; employees and spouses (or other dependents) electing health benefits for the same dependent ID; and employees who have coverage dependents.	Benefits, Administer COBRA Benefits, Review Processing Results, Audit Report	RUNCTL_ASODATE_BEN
CBR008 COBRA Administration Error	Displays errors in the COBRA process, including COBRA event conflicts, lack of eligible benefit program or multiple eligible benefit programs, or duplicate COBRA events.	Benefits, Administer COBRA Benefits, Review Processing Results, Error Report	RUNCTL_CBR008
FGPY017 (USF) FEHB Reconciliation	Federal agencies are required to send quarterly reports to major FEHB providers. These reports allow the provider to compare their enrollment records with that of the federal agency. They also provide total headcount and premium amounts.	Benefits, Interface with Providers, FEHB Reconciliation Report	GVT_RUN_FGPY017
NDT004 401 Nondiscrimination Testing	Lists output from the 401(k) Nondiscrimination Testing SQR (NDT002) and from the 401(m) Nondiscrimination Testing SQR (NDT003).	Benefit, Conduct Nondiscrimination Tsts, Section 401 Testing, 401 Testing Report	RUNCTL_NDT004

Report ID and Report Name	Description	Navigation	Run Control Page
NDT008 129 Nondiscrimination Testing	Lists the results of three Section 129 Nondiscrimination Testing SQRs: <i>NDT005</i> : Eligible Cross Section Test (eligible employees test) <i>NDT006</i> : 55% Average Benefits Test <i>NDT007</i> : Concentration Test (5% Owner Test)	Benefit, Conduct Nondiscrimination Tsts, Section 129 Testing, 129 Testing Report	PRCSRUNCTL
PAY031 Deductions and Benefits Register	Reports deductions taken, sorted by deduction code	Benefits, Reports, Contributions and Deductions, PI Benefit Deductions Register	RUNCTL_PAYINIT2
PAYVNDR Provider/Vendor	Lists information from the Provider/Vendor table, including provider name and ID, provider effective date, provider address, and a separate address line for premium payment, where applicable.	Set Up HRMS, Product Related, Base Benefits, Plan Reports, Provider/Vendor Listing	RUNCTL_PAYVNDR
RDED001 Retroactive Deductions Requested - 'Not Processed Status	Lists retroactive deduction requests that have not been processed.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded Pending Request Summary	RUNCTL_RTRODED1
RDED002 Retroactive Deductions in Progress - 'Calculate Status'	Lists retroactive deduction requests that have been processed.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded All Calculated	RUNCTL_RTRODED1
RDED002B Retro Ben/Ded Summary	Summarizes retroactive deduction request information by employee ID. Includes deduction type, deduction amount (old and new), and recalculated deduction amounts with the total due to or due by the employee.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded Paysheet Load Summary	RUNCTL_BEN_LANG
RDED003 Retroactive Deductions Audit Rpt - 'Loaded to Paysheet' Status	Summarizes retroactive deduction information for requests loaded to the payroll system. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the employee.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded Paysheet Load Audit	RUNCTL_RTRODED3

Report ID and Report Name	Description	Navigation	Run Control Page
RDED004 Retroactive Ben/Ded Terms Calculated (Terminated Employees Loaded)	Summarizes retroactive deduction information for requests loaded to the payroll system for terminated employees. Includes deduction type, deduction amount (old/new) and recalculated deduction amounts with total due to and/or due by the employee.	North American Payroll, Retroactive Payroll, Reports, Ben/Ded Terms Calculated	RUNCTL_RTRODED3

Performance Management Reports

Report ID and Report Name	Description	Navigation	Run Control Page
HEP001 Missing Documents	Lists missing documents for a group of employees (Group ID) and a given document type and date range.	Workforce Development, Performance Management, Reports, Missing Documents	RUNCTL_EP_RPT
HEP002 Late Documents	Lists manager documents whose due date has passed.	Workforce Development, Performance Management, Reports, Missing Documents	RUNCTL_EP_RPT

PeopleSoft HRMS Reports: Selected Reports

This section provides detailed information on individual reports. The reports are listed by report ID.

PER044 - Multiple Seniority Components – Basic Report

The report provides the following information regarding the origin of the seniority rate code:

- If the worker receives a seniority pay component as a result of belonging to a group associated with a seniority rate code, the report displays the corresponding group ID for the seniority rate code.
- If a worker receives the seniority pay component because the seniority rate code is associated with all workers, the report displays *All* as the origin of the seniority rate code.
- If a worker receives the seniority pay component because you manually added it, the report displays *Manually Added* as the origin for the seniority rate code.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Compensation, “Administering Seniority Pay”

PER033 - Citizenship/Country/Visa Audit – Administer Workforce

The report flags six different types of discrepancies. Specifically, it flags employee records when the following pairs of data exist:

Citizenship Status	• Native or Naturalized. • Not Native or Naturalized.
Country of Citizenship	• Not the local country. • The local country.
Visa Record	• Exists for the local country. • Doesn't exist for the local country.

The report puts a page break between categories.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Entering Additional Data in Human Resources Records,” Managing Citizenship and Visa/Permit Information

PER058 - Primary Job Audit – Administer Workforce

One important reason to designate primary and secondary jobs is to create accurate data for regulatory reporting. By running reports for an employee's primary job only, you create an accurate employee count for affirmative action and other government reports. However, the flexibility PeopleSoft Human Resources gives you to designate primary and secondary jobs could compromise the accuracy of your reporting data. It's possible to have employees who have no job designated as a primary job, or more than one primary job, or an inactive job designated as the primary job. We recommend checking regularly to correct these kinds of discrepancies in your employee job records. Use the Primary Job Audit report to check for discrepancies in the primary job designation for employees with multiple jobs.

This report lists all employees and/or nonemployees whose job records show the following potential problems:

- Multiple primary jobs: More than one active job is currently designated as a primary job.
- Terminated primary job: The primary job was terminated and a nonprimary job is the active job.
- No primary job: None of the person's concurrent jobs has been chosen as the primary job.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information,” Running Job Data Reports

PER066JP - JPN Employee Assignment List Report

This report lists employees by department and supervisor level including employees with additional appointments.

To run the report, at least one Department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by Department then:

- Employees with supervisor levels registered in the Supervisor Level tree, in tree order.

- Employees with supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Employees without supervisor levels, in alphanumeric employee ID order.

Note. The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL if the system is to use it. If you have not defined a Supervisor Level tree with that name, sorting will be in alphanumeric supervisor level order.

POS006A - Build Position Structure – Manage Positions

After you enter all the reporting relationships among positions in the Position Data component, run this SQR. The Build Position Structure report enters a value in the ORG_CODE field and defines the position in the hierarchy. When you run the Build Position Structure report the system updates the position structure with data valid before or on the As of Date you specify.

You should run this report when you first enter the reporting relationships, any time you add new positions, and when you change reporting relationships among existing positions. You must run this SQR before you can run the Indented Position Hierarchy report, POS006.

When you run Build Position Structure, the system may generate one or more diagnostic messages to help you understand the utility output. They are as follows:

- If the utility doesn't find a root position (a position that reports to itself), it displays an error message. If you do not have a root node, the utility can not produce a report.
- If you have circular reporting conditions, such as when position 1 reports to position 2, and position 2 reports to position 1, the utility displays a warning message and the positions will not appear in the report.
- If you do not have data in the Reports To Position field for a position, the utility displays a warning message. These positions will not appear in the report.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Maximizing Position Data,” Running the Organizational Structure Reports

POS008 - Exception/Override – Manage Positions

You can print incumbent job data where you have prevented automatic cross-updating from occurring (overrides), or you can print only exceptions where the incumbent job and position data is out of sync for other reasons (exceptions).

The Exception/Override report lists the position name and the name of the employee assigned to the position and shows the data in the fields that match in the Position Data component and Job Data component. The report displays those employees whose Employee Status is *Active*, *Leave of Absence*, *Suspended*, or *Leave with Pay*.

When you run this report for exceptions and the Business Title in the incumbent Employment Data doesn't match the Position Title in Position Data, the report prints an asterisk (*) next to the Position Title. The report also prints *Match* or *No Match* in the Mail Drop column, depending on whether the data is the same in the incumbent job and position data.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Managing Position Data,” Verifying Position Data

PKG006 - Salary Packaging FBT Reconciliation – Administer Salary Packaging

For reporting purposes you need to identify all the different categories of fringe benefits and the taxable value of the benefits. In the FBT Reconciliation report, all FBT categories are identified, based on the component types you define on the Package Component table component. For each component type, or FBT category, you can see the employees who have received this benefit in the FBT year. You also see information on the budgeted and the actual gross taxable value of the benefits. These values are shown for each employee and as a total for each component.

You can combine the information provided in the FBT Reconciliation report with information from your other administrative systems to accurately complete your FBT return for the Australian Taxation Office.

Note. The FBT Reconciliation Report includes values calculated during the Package Expense Calculation. To ensure that you get accurate totals included in the FBT Reconciliation report, execute the Package Expense Calculation at the end of the FBT Year for which to run the FBT Reconciliation report. You must complete this before running the report.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Salary Packaging, “Managing Salary Packages,” Running Salary Packaging Reports

HRH905CN - StatsCan FT Survey – Track Faculty Events

After you submit your full-time and part-time Academic Teaching Survey report flat files to Statistics Canada, you receive a summary report from Statistics Canada. Use the StatsCan FT Survey report to compare your results with Statistics Canada’s summary.

The report consists of four pages; each includes full-time survey salary calculations based on different selection criteria:

- Including administrative posts and medical and dental categories.
- Including administrative posts, excluding medical and dental categories.
- Excluding senior administrative duties, including medical and dental categories.
- Excluding senior administrative duties and medical and dental categories.

VC011 – Organization and Group Goals – Manage Variable Compensation

The Organization and Group Goals report is an optional report that you can run before or after the goal measurement period. This report provides the plan goal weights for the variable compensation plan ID and period ID and a list of all organization and group weighted goals in the plan with their weighting percent and attainment percent.

This report provides the following information:

- The Plan Goal Weights for the variable compensation plan ID and period ID.
- A list of all organization weighted goals in the plan with their weighting percent and attainment percent.
- A list of all group weighted goals in the plan by group with their weighting percent and attainment percent.

If the group does not have goals, the report indicates that the child group's goals are the parent group's goals.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Variable Compensation, “Managing Plans With Weighted and Matrix Goals,” Running the Organization and Goals Report

VC013 – Subscription Error – Manage Variable Compensation

This report identifies each individual who had either an erred or rejected award under the variable compensation (VC) plan ID and payout period ID. For each erred or rejected award, the report identifies the employee, award value, award status, and rejection reason (payroll only).

The following are the valid payroll rejection reason codes:

- Invalid Earning Code (Invalid EC)
- Invalid Employee ID & Record # (Invalid EE)
- Invalid Currency Code (Invalid CC)
- Transaction already exists (Tran exist)
- Amount Exceeds Payroll Maximum (Exceed Max)
- Reject All -Requested by VC (Reject All)

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Variable Compensation, “Managing Awards Approval and Payout,” Reporting Related to Award Payout and Distribution

PER041 - Employee With Merit – Plan Salaries

The Employee With Merit report lists all employees who have received a merit increase during the period entered on the parameter page.

Criteria for Selecting Employees With a Merit Increase

An employee is listed on this report if the following conditions are met during the time period specified:

- The employee's summation-type employee review on the Employee Review pages has Approved status.
- The review result has been loaded to the job record using the Review Result to Job Data process.
- This process inserts a new row into Job, updating the employee's compensation package. The effective date is the employee review effective date. The rate code inserted is the rate code associated with the rating scale in the Review Rating Scale Table.
- If the rating scale in the Job Data record and the rate code in the Compensation record are the same as those defined in the Rating Scale Table, the employee is listed on the report.

Calculating Percents and Averages

The report displays compensation rates and percents at the level of the employee, the average compensation rates and percents for the company location, and the average compensation rates and percents locations in the company.

%	For each employee, the report displays a percent by calculating the employee's compensation rate divided by compensation rate of all employees during the period.
Average Comp Rate (average compensation rate)	For each company location, the report displays the average compensation rate by calculating the sum of all compensation rates divided by the number of employees in the company location.
Average %	For each company location, the report displays the average percent by calculating the sum of the employee % and dividing by the number of employees in the company location.
Total Average Comp Rate (total average compensation rate)	At the end, the report displays the total average compensation rate of all companies by calculating the Average Comp Rate of all company locations divided by the number of employees in all company locations.
Total Average Percent	At the end, the report displays the total average percent of all companies by calculating the sum of the Average % of all company locations divided by the number of employees in all company locations.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries, “Viewing and Reporting Summary Salary Data,” Running Compensation Change Reports

BEN004 - Savings Investment Distributions – Base Benefits

This report lists the total deductions made to date and the total company contributions for employees participating in benefit programs that contain savings plans. It prints the total amount available for investment broken down by investment distribution and expressed both as a monetary amount and as a percentage of the total.

For each plan type, it shows the total amount deducted for employees in the plan type and company contributions. The report inserts page breaks and supplies totals at the company, benefit program, plan type, and benefit plan levels.

See Also

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

BEN733 - Base Benefit Audit – Base Benefits

The Base Benefits Audit Report provides a summary of potential employee data issues as related to Base Benefits business process that would enable you to catch errors that would otherwise show up when you try to process enrollments or changes.

The audits performed are Employees without Employment records, Employees without Job records, Employees less than 16 years old, People with unusual dependents signed up for coverage, Employee and spouse (or other dependent) both electing health benefits, Employees with over-age dependent coverage, Employees with incorrect health plans set up on the Benefit Program Table, and audits for consistency of marital and dependent relationships.

Perform these audits during implementation, before you enroll participants, and periodically during the plan year.

See Also

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

CBR005 - COBRA Event Report – Base Benefits

This report provides data about COBRA beneficiaries at the Event Level. The report will list all employees to whom an event has occurred. The qualified status indicates whether the qualified beneficiary is Qualified (QL), Not Qualified (NQ), Not qualified/duplicate (ND) or QE (Qualify Error).

See Also

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

CBR007 - COBRA Audit – Base Benefits

This report displays information on: Employees enrolled in Active and COBRA Health Coverage; Employee and Spouse (or other dependent) electing health benefits for the same Dependent ID; and employees who have overage dependents.

You can use this report to analyze whether there is an overlap in COBRA and Active coverage, whether dependents are being covered by more than one EMPLID or whether an overage dependent has not been detected.

See Also

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

CBR008 - COBRA Administration Error – Base Benefits

This report displays information about errors that result from running the COBRA process. The errors include COBRA event conflict, no eligible benefit program or more than one eligible benefit programs, or duplicate COBRA events.

You can use the COBRA Administration Error Report to identify and troubleshoot errors that surface as a result of COBRA processing. You can also identify these errors online. You might want to print the report and request that staff check off each error as they determine a resolution, thereby creating an audit trail for verifying that all errors have been analyzed.

See Also

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

NDT004 - 401(k)/401(m) Nondiscrimination Testing – Base Benefits

Specify 401(k) or 401(m) for the report output.

If this report is run mid-year and a forecast percentage is specified in the 401 NDT run control, the report also shows forecasted year end earnings, contributions, and related ADP/ACP results.

This report does not attempt to recalculate the Actual Deferral Percentage (ADP) or to determine whether the nondiscrimination tests passed. It assumes these tests were handled by the NDT002 or NDT003 SQRs. However, in cases where the Aggregate Limit Test must be used, this report serves as the only method to invoke the test; there is no separate SQR for this.

If the Aggregate Limit Test is invoked, each report includes results for both the 401(m) and 401(k) tests, as well as the Aggregate Limit Test pass/fail status. The system prevents you from initiating NDT004 if the run control has been updated and you have not initiated these SQRs:

- *NDT001*: This SQR lists plan type, plan name, benefit plan name and ID, effective date, accrual process date, accrual frequency, service interval, special calculations, year the plan begins, and the maximum leave balance and carryover allowed.
- *NDT002*: You initiate this SQR after NDT001 to update the actual and forecasted amounts in the nondiscrimination testing run control table for the 401(k) NDT.
- *NDT003*: This SQR updates the actual and forecast 401(m) amounts in the nondiscrimination testing run control table for the 401(m) NDT.

See Also

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

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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