PeopleSoft®

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Absence

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PeopleSoft 8.8
Human Resources PeopleBook:
Monitor Absence
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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

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.
Italics	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 0, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
`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 *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date: The last date for which a report or process includes data.

Business Unit: An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description: Enter up to 30 characters of text.

Effective Date: The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run**: Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

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

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources Monitor Absence Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

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

PeopleSoft Application Fundamentals

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

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

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

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

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

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

CHAPTER 1

Getting Started With PeopleSoft Human Resources Monitor Absence

This chapter provides an overview of PeopleSoft Human Resources Monitor Absence and discusses:

- PeopleSoft Human Resources Monitor Absence business processes.
- PeopleSoft Human Resources Monitor Absence implementation.

PeopleSoft Human Resources Monitor Absence Business Processes

Listed below are the business processes for PeopleSoft Human Resources Monitor Absence:

- Define absence parameters.
- Assign work and holiday schedules.
- Track employee absences.
- Report absences.
- (NLD) Register Dutch illness.
- (GBR) Track maternity and parental leave.

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

PeopleSoft Human Resources Monitor Absence Implementation

The PeopleSoft Human Resources Monitor Absence table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- PeopleSoft Human Resources Monitor Absence application tables.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences. A complete list of these resources appears in the *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook,* with information about where to find the most current version of each.

Important! The order in which you set up the tables required to implement PeopleSoft Human Resources Monitor Absence may vary. You do not necessarily set up each application in sequence. For example, you might set up HRMS tables, then tables for PeopleSoft Human Resources Monitor Absence, then tables specific to the relevant country or industry, and then additional PeopleSoft Human Resources Monitor Absence core tables. In addition, the order in which you set up tables may depend on the features that you use. This chapter explains how PeopleSoft documentation corresponds to the overall implementation process. The chapter does not provide step-by-step instructions on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Human Resources Monitor Absence requires that you set up fundamental HRMS tables that are common to multiple HRMS applications. The following table discusses the steps.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Getting Started With PeopleSoft HRMS"
2. Set up PeopleSoft Human Resources fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Getting Started With PeopleSoft HRMS"

Setting Up PeopleSoft Human Resources Monitor Absence Tables

The steps discussed in this section suggest an order in which you define the information in your core PeopleSoft Human Resources Monitor Absence tables. The information that you define in the fundamental tables lays the foundation for this setup.

Setting up the core PeopleSoft Human Resources Monitor Absence tables prepares your system to support these business processes:

- Define absence classes, types, codes and parameters.
- Assign work and holiday schedules.
- Track employee absences.
- Reporting absences.

Step	Reference
1. Define absence classes, types, codes, and parameters.	Chapter 3, "Setting Up Absence Data," Setting Up Absence Classes, Types, Codes, and Parameters, page 6
2. Define work and holiday schedules.	Chapter 3, "Setting Up Absence Data," Setting Up and Assigning Work and Holiday Schedules, page 13

CHAPTER 2

Understanding PeopleSoft Human Resources Monitor Absence

This chapter discusses:

- PeopleSoft Human Resources Monitor Absence.
- PeopleSoft Human Resources Monitor Absence Business Processes.
- PeopleSoft Human Resources Monitor Absence Integrations.
- PeopleSoft Human Resources Monitor Absence Tables.

PeopleSoft Human Resources Monitor Absence

PeopleSoft Human Resources Monitor Absence enables you to set up and track employee absences, such as vacations, holidays, sick leave, maternity leave, and parental leave.

PeopleSoft Human Resources Monitor Absence Business Processes

PeopleSoft Human Resources Monitor Absence supports the following business processes:

- Define absence parameters.

  You can maintain and track absence data to monitor worker absences for both performance evaluation and project planning.

- Assign work and holiday schedules.

  You can identify work and holiday schedules times when employees are expected to be either at work or absent. By tracking work times, you can set a work schedule for your workers depending on your needs.

- Track employee absences.

  You can enter and track all general employee absences.

- Report absences.

  You can run various reports on employee absences.

- (NLD) Register Dutch illness.

You can report daily illness absences for workers employed under Dutch regulations if your organization is registered under a Dutch Industrial Insurance Board (*Bedrijfsvereniging*).

- (GBR) Track maternity and parental leave.

  You can track maternity and parental leave for the United Kingdom.

PeopleSoft Human Resources Monitor Absence Integrations

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

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

We cover integration considerations in this PeopleBook.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS,” Understanding HRMS EIPs that Publish Only

CHAPTER 3

Setting Up Absence Data

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

- Set up absence classes, types, codes, and parameters.
- Set up and assign work and holiday schedules.
- Set up vacation benefit plans.

Understanding Absence Data

With PeopleSoft Human Resources Monitor Absence, you can maintain and track absence data, both historical and current, so that you can better monitor employee absences for both performance evaluation and project planning. Use PeopleSoft Human Resources Monitor Absence to track typical absences such as sickness, maternity leave, trade union duties, public duties, and annual holidays.

Note. The absence tables and modules described in this section are for use with PeopleSoft Human Resources and certain other HRMS applications. If you're using PeopleSoft Global Payroll, use separate absence tracking functions.

SetIDs and Regulatory Regions

During absence data setup, you must consider the regional (that is, national or provincial) regulatory and legislative practices that are applicable to employees, and you need to understand how these translate into company policies.

The Absence Class and Absence Type tables are keyed by setID so that you can maintain separate sets of absence types and codes for different regions, as required by the regulatory and legislative practices of the regions.

Because each country monitors different types of absences, use regulatory regions to process all employee absences within the PeopleSoft Human Resources system. A *regulatory region* is a set-sharing entity similar to *business unit,* and you associate regulatory regions with setIDs by using the TableSet Control page. PeopleSoft Human Resources Monitor Absence uses the association between setID and regulatory region to ensure that operators have access to the applicable codes for the countries in which employee absences occur.

See Also

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

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding Regulatory Regions in PeopleSoft HRMS"

Setting Up Absence Classes, Types, Codes, and Parameters

This section discusses how to define:

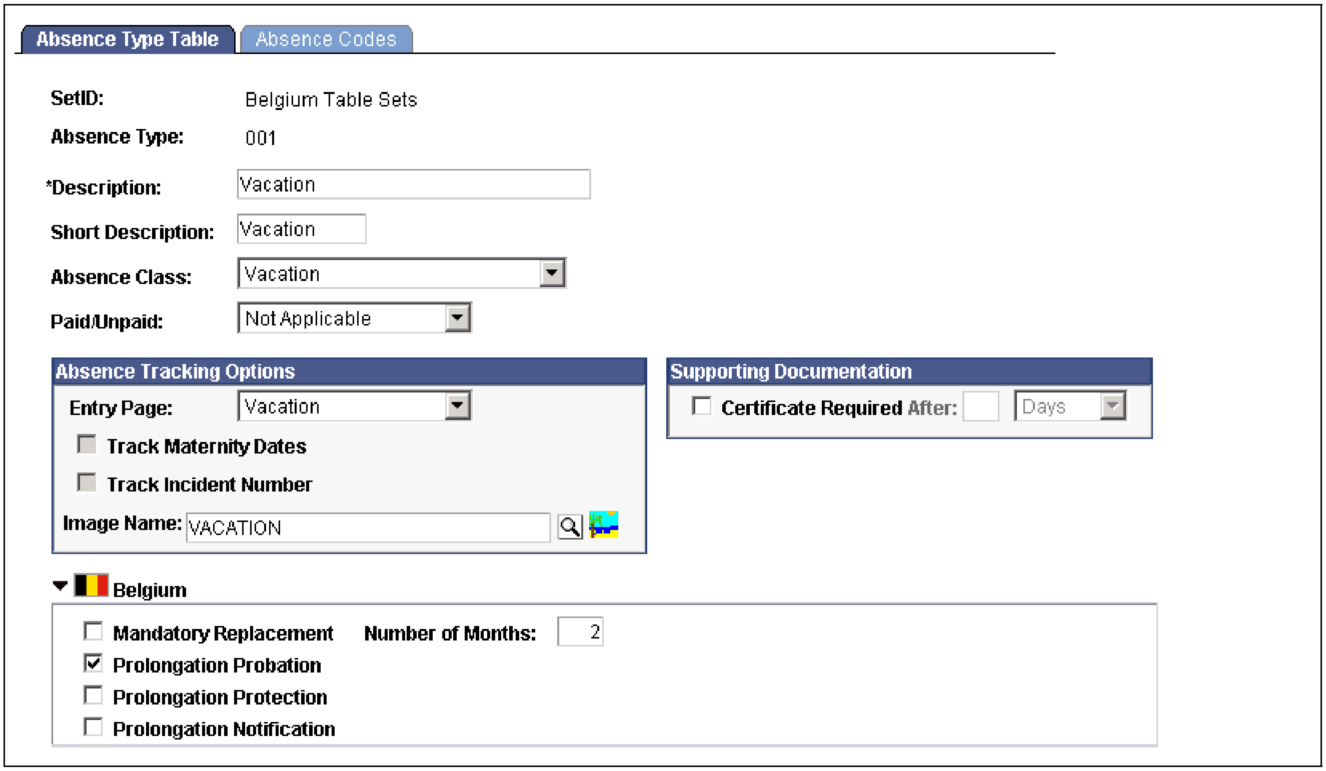
- Absence classes
- Absence types
- Absence codes
- Absence parameters

Pages Used to Set Up Absence Classes, Types, Codes, and Parameters

Page Name	Object Name	Navigation	Usage
Absence Class Table	ABS_CLASS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Absence Class Table	Define absence classes for regulatory regions.
Absence Type Table	ABS_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Absence Type Table	Define the types of absences that employees take.
Absence Codes	ABS_CODE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Absence Type Table, Absence Codes	Define absence codes for absence types.
Absence Parameters	ABS_PARAMETERS	Set Up HRMS, Product Related, Workforce Administration, Absence, Absence Parameters	Define the parameters for tracking an employee absence. Use these parameters on the absence calendar.

Defining Absence Types

Access the Absence Type Table page.



Absence Type Table page

Absence Type Displays the type of absence that you entered to access this page.

Absence Class Select types of absences that you want to group for reporting purposes. Generally, the absence class is a category to which the absence type belongs. For example, if you track three different types of sicknesses, you could categorize them all under the absence class *Sickness* for reporting purposes.

Paid/Unpaid Select to indicate whether employees using this absence type are paid while absent.

Note. Indicating that an absence type is paid does not mean that the system automatically generates a payment for this type of absence. You must set up the payments through the payroll system.

Absence Tracking Options

The options in the Absence Tracking Options group box control how and where absence data is processed on the General Absence, Vacation, UK Maternity Leave, or UK Paternal Leave pages.

Entry Page Select to indicate the default for this absence type. Options are:

General Absence: Track information on all employee absences of this type.

UK Maternity Leave: Track UK maternity leave only.

UK Paternal Leave: Track UK paternal leave only.

Vacation: Use for other types of leave not categorized by the preceding two options.

Track Maternity Dates Select to track employee maternity absence on the General Absence page. The page includes a Maternity button that enables you to enter additional maternity data, such as expected and actual birth dates.

Track Incident Number Select to track incidents on the General Absence page. This option enables you to associate incidents that you create in PeopleSoft Health and Safety with absences that you enter as part of absence monitoring.

Image Name Displays a graphical representation of the symbol to be used to denote the selected absence type on the absence calendar. PeopleSoft provides images for *Sickness, Vacation,* and *Maternity* for certain setIDs.

Supporting Documentation

Certificate Required After Select this check box and enter the duration for which you require a certificate (if certification is required). In companies in many countries, employees must produce a medical certificate or some other form of supporting documentation if the absence exceeds a specific number of days.

(BEL) Belgium

Enter data required to define absence types for Belgian companies.

Mandatory Replacement Select to indicate whether a replacement is required for this absence type.

Number of Months If a replacement is required, indicate the length of time that the replacement can hold the position.

Prolongation Probation Select if the absence affects a probation period. This option indicates that you may need to take the absence into account and extend the probation period.

Prolongation Protection Select if the absence affects a protection period. This option indicates that you may need to take the absence into account and extend a protection period.

Prolongation Notification Select if the absence affects a notification period.

See Also

Chapter 5, "Tracking Vacations," page 35

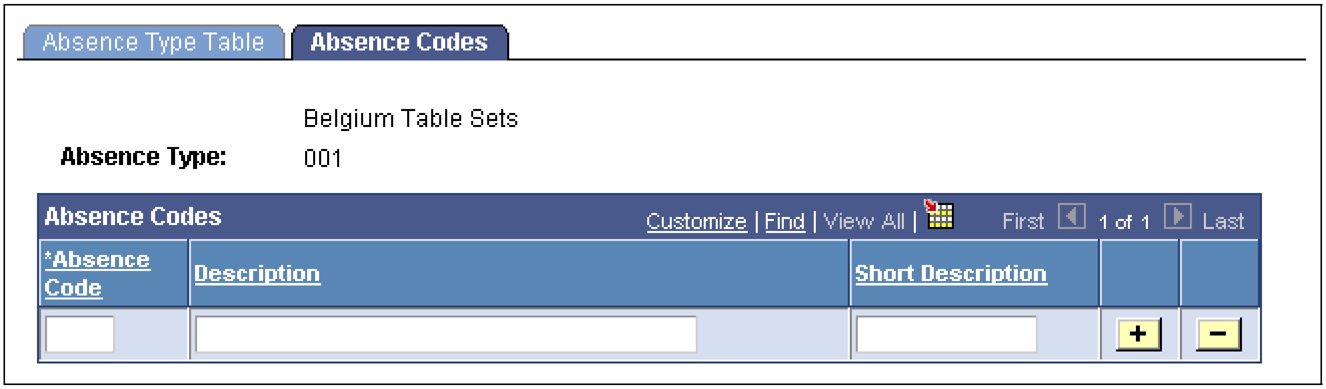
Chapter 7, "(GBR) Tracking Maternity and Parental Leave," page 49

Chapter 4, "Tracking General Absences," Viewing Absences on the Calendar, page 32

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

Defining Absence Codes

Access the Absence Codes page.



Absence Codes page

Absence Codes

Enter a three-letter code indicating a type of absence.

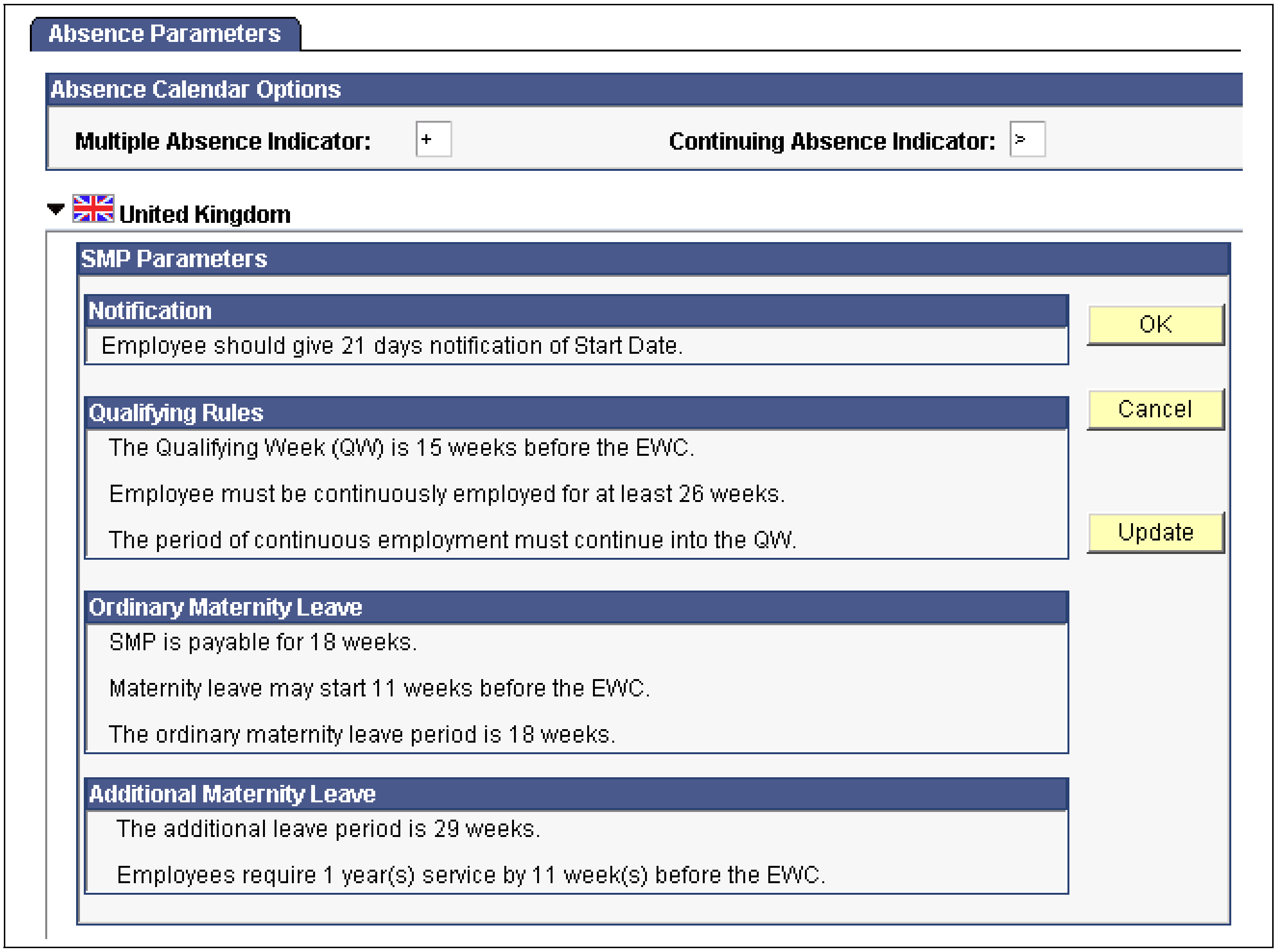
Define as many codes as necessary to cover every aspect of the absence type. To enter additional codes, insert new rows.

Each absence type consists of a group of absence codes that you use to provide detailed descriptions for specific types of absences. For example, you could track various types of illness within the absence type Sickness.

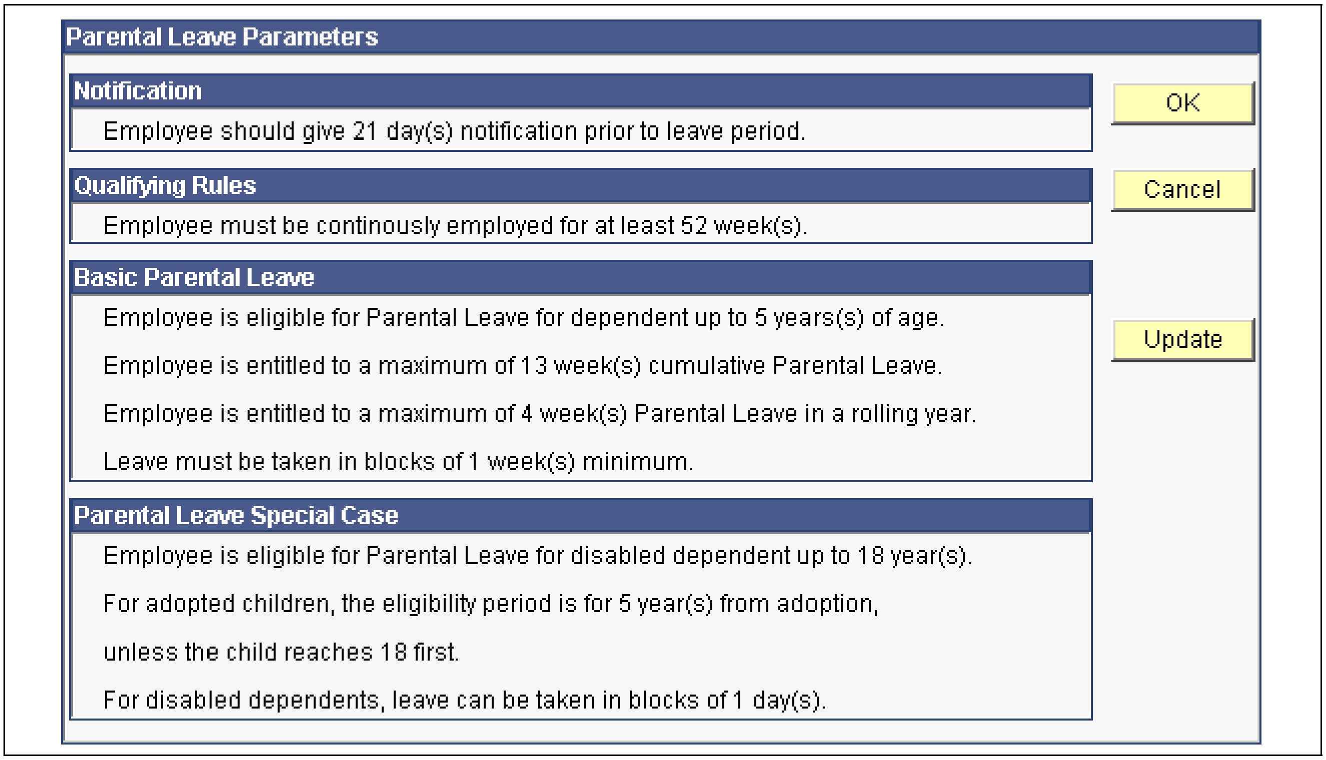
The way that you define absence codes for your organization is discretionary. You can modify the list of codes as necessary for your business requirements, or you can disregard this feature altogether.

Defining Parameters for Tracking Employee Absence

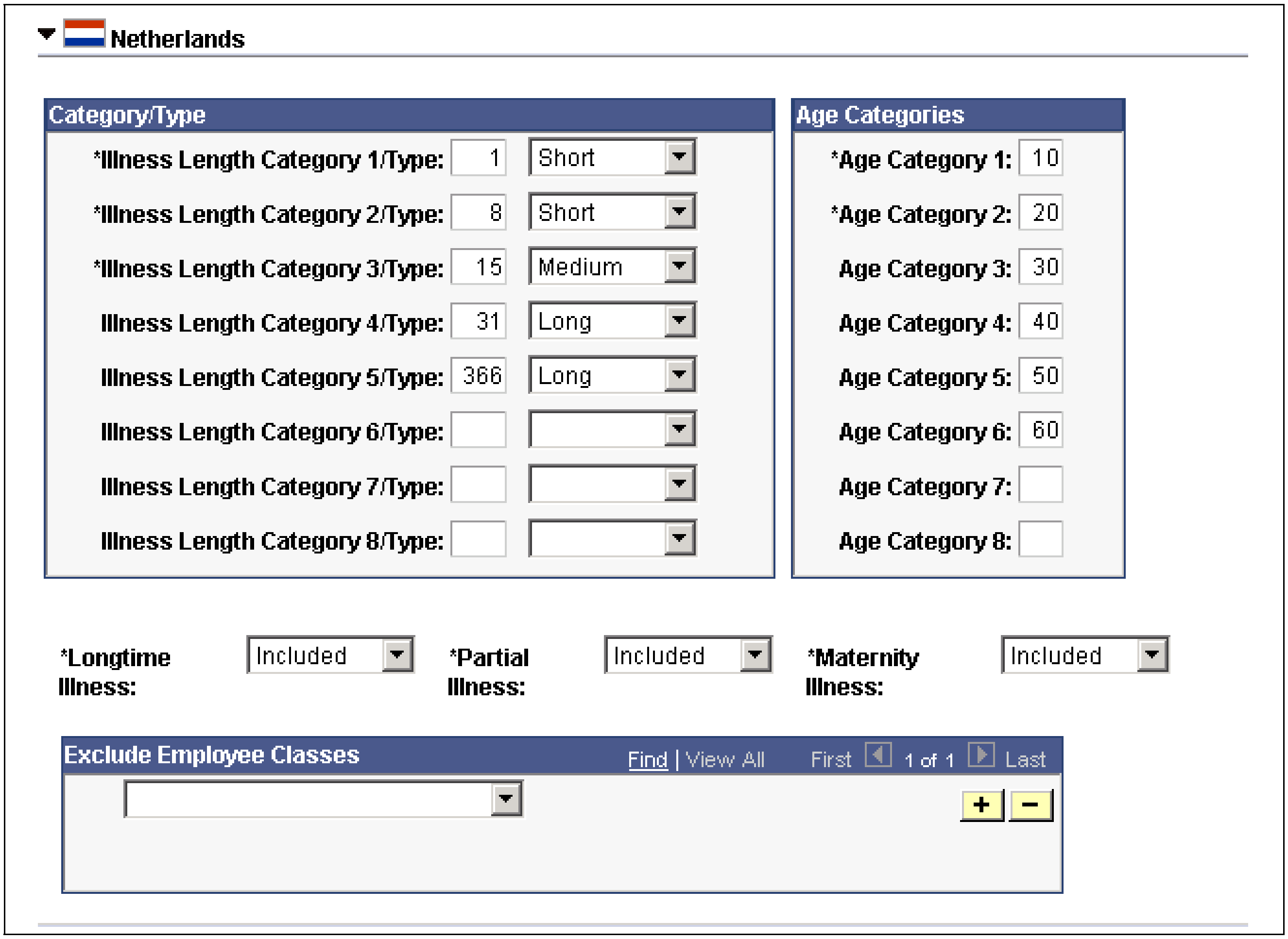
Access the Absence Parameters page.



Absence Parameters page (1 of 3)



Absence Parameters page (2 of 3)



Absence Parameters page (3 of 3)

Absence Calendar Options

Multiple Absence Indicator Displays the symbol that indicates multiple absences. You can change this symbol for different regulatory regions.

Continuing Absence Indicator Displays the symbol that indicates an ongoing absence. You can change this symbol for different regulatory regions.

(GBR) United Kingdom

Use the standard maternity pay (SMP) parameters and parental leave parameters to define statutory maternity pay and parental leave pay parameters for UK companies.

Update Click to edit the fields in the United Kingdom collapsible section. By default, the fields (which are prescribed by UK regulations) are display-only.

Note. These values are for tracking purposes only. The PeopleSoft Human Resources system does not calculate SMP or payments of parental leave. You must calculate SMP and parental leave, if paid, in your payroll or other external system.

(NLD) Netherlands

Specify the types of illnesses to include or exclude from the report. This information is necessary to comply with Dutch illness registration reporting requirements. You can also exclude certain employee classes.

Longtime Illness	Select to include or exclude a longtime illness.
Partial Illness	Select to include or exclude a partial illness. An illness is considered to be partial if the illness percentage is less than 100 percent.
Maternity Illness	Select to include or exclude maternity leave.
Exclude Employee Classes	If excluding classes, select which classes of employees to exclude from the illness registration report. Insert as many rows as necessary to list all excluded employee classes.

Setting Up and Assigning Work and Holiday Schedules

Work and holiday schedules specify when an employee is expected to be either at work or absent. By tracking work times, you can set employee work schedules that meet your needs. Some organizations need several work schedules because they have many kinds of employees working a variety of hours. Other organizations may need only one schedule because their employees all work the same hours.

This section provides an overview of work templates and discusses how to:

- Define work templates.
- Create work schedules.
- Set up holiday schedules.
- Assign work and holiday schedules to employees.

Understanding Work Templates

A work template consists of a series of days, or work periods, and the time worked on those days. The template does not indicate specific dates but merely a pattern of work over a day or series of days.

For example, a template for an office worker who has regular Monday to Friday hours might show five days of working eight hours per day, then two days with no work. By contrast, for an employee who works irregular hours, you might set up a different template with four days of working seven hours per day, one day off, one day at ten hours per day, and one day off.

Use work templates to create work schedules. A work schedule may consist of one template, or you can combine templates to describe more complex work patterns. Create as many templates as needed to build all components of your organization’s work schedules.

Example Template

If an employee works from 22:00 to 6:00 three days per week, the work template would look like this:

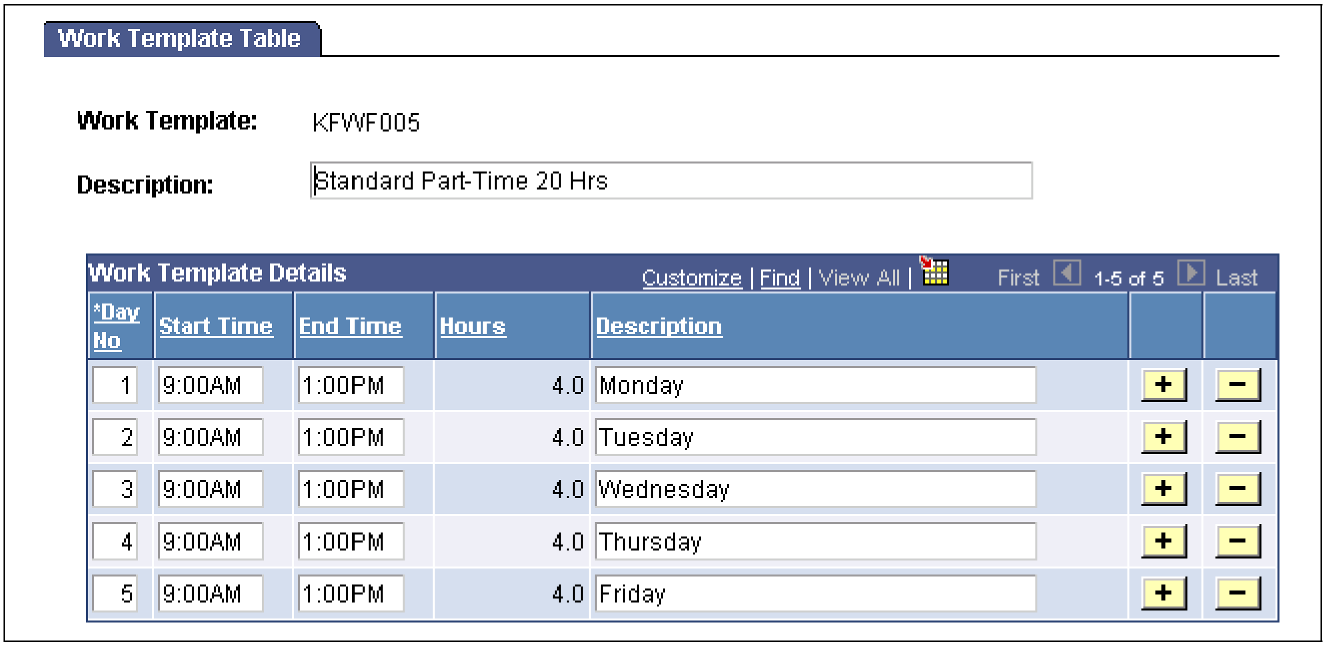
Day No	Start Time	End Time
1	22:00	24:00
2	00:00	06:00
2	22:00	24:00
3	00:00	06:00
3	22:00	24:00
4	00:00	06:00

Pages Used to Set Up and Assign Work and Holiday Schedules

Page Name	Object Name	Navigation	Usage
Work Template Table	ABSW_TMPL_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Work Template Table	Define work templates. The templates describe unique work patterns for your workforce.
Work Schedule Table	ABSW_SCHD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Work Schedule Table	Create schedules that match the requirements of your employees and their respective functions. Schedules represent a cyclical work or nonwork pattern made up of templates.
Holiday Schedule Table	ABS_HOL_SCHD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Holiday Schedule Table	Set up all holiday dates for the regulatory regions.
Work Schedule	ABSW_SCHEDULE	Workforce Administration, Absence and Vacation, Track Absence History, Assign Work/Holiday Schedules, Work Schedule	Assign work and holiday schedules to employees. Update schedule assignments.

Defining Work Templates

Access the Work Template Table page.



Work Template Table page

Work Template Displays the work template ID that you assign when you define a new template.

Day No (day number) Enter the day number for each entry. Use the same day number more than once to indicate separate work times on the same day.

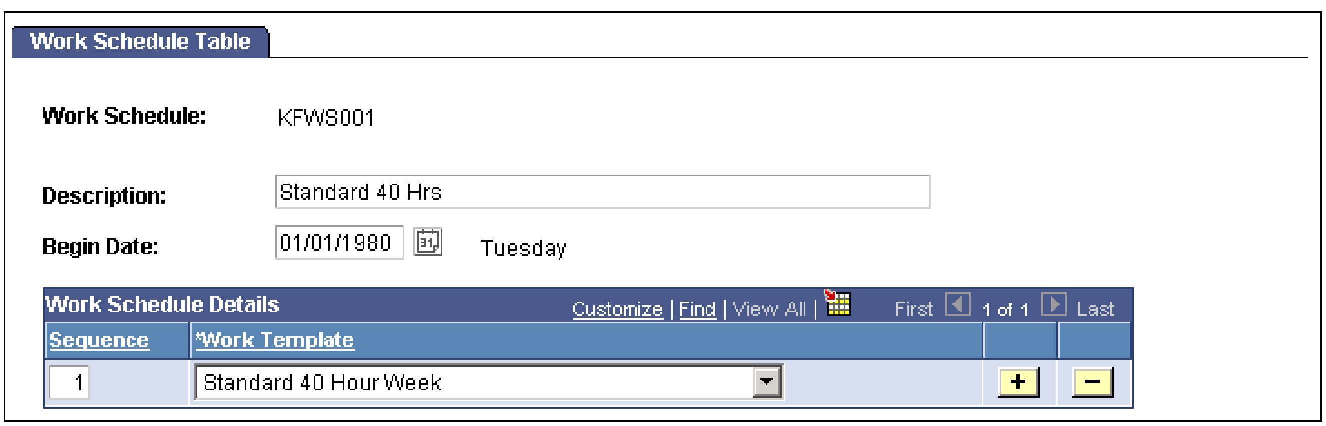
Start Time Enter the start time for the indicated day.

End Time Enter the end time for the indicated day.

Hours Displays the number of work hours based on the values in the Start Time and End Time fields.

Creating Work Schedules

Access the Work Schedule Table page.



Work Schedule Table page

Every employee in the system can have a schedule allocated that matches his or her employment contract or functional requirement. These personal schedules enable you to map present and future work patterns for each employee.

Work Schedule	Displays the work schedule ID that you entered to access this page.
Begin Date	Enter the date on which the work schedule takes effect. This date is important when you associate schedules with employees.
Sequence	Enter a number to specify the order in which the work templates take effect.
Work Template	Select a work template that represents a cyclical work or nonwork pattern.

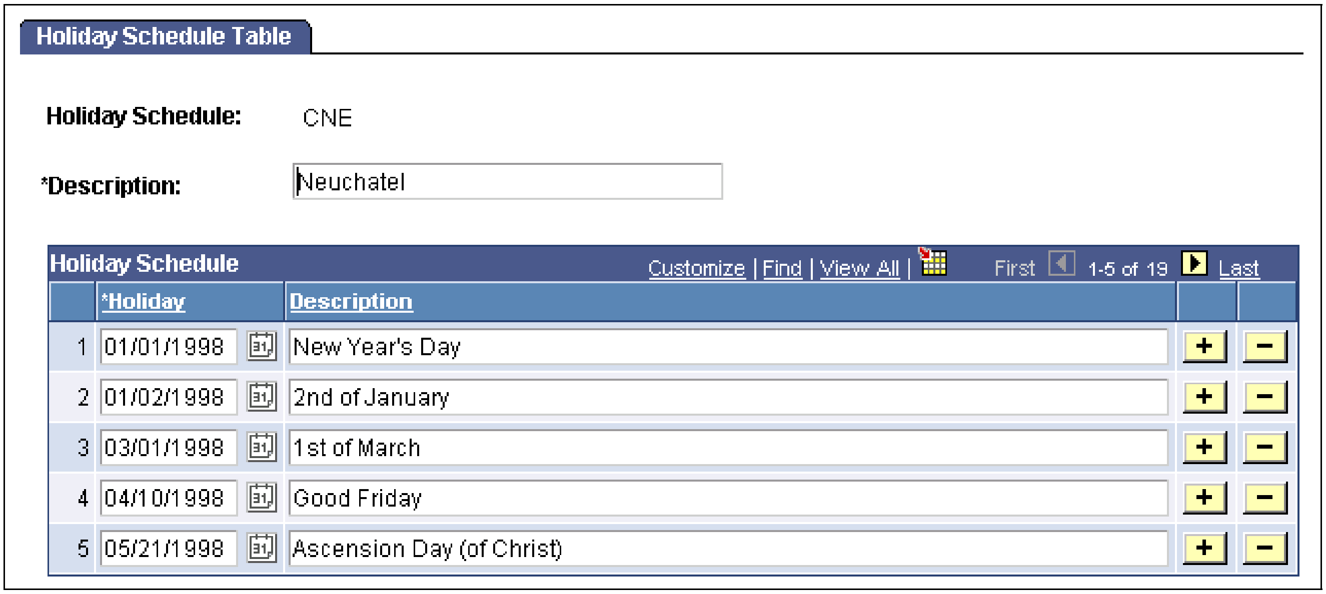
Example Schedule

Use the same template as many times as necessary to achieve the schedule that you want. For example, if an employee works seven days, has two days off, works five days, then has two off, use the following setup:

Sequence	Work Template	Description
1	All Days	Employee works according to template definition (seven days straight).
2	Two Days Off	Employee takes the next two days off.
3	Five Days	Employee returns to work for another five days.
4	Two Days Off	Employee takes another two days off.

Setting Up Holiday Schedules

Access the Holiday Schedule Table page.



Holiday Schedule Table page

When an employee is absent, the system uses the holiday calendar for that employee when calculating the duration that the employee is actually absent from work.

Holiday Schedule Displays the ID of the holiday schedule.

Holiday Enter all the holiday dates that your organization observes within this schedule. These dates are reflected on the absence calendar as nonwork days.

Note. Although this page appears on other menus, it is the same table in all cases. Changes made here apply wherever the page is used.

Assigning and Updating Work and Holiday Schedules

Access the Work Schedule page.

Work Schedule page

Begin Date Enter the date that the work schedule takes effect for this employee. Work schedules are keyed by this date. A new begin date in the overall work schedule diary is interpreted as the start of a new work schedule. Work schedules are cyclical.

End Date Enter the date that the work schedule ceases to be effective. This date must be later than the begin date.

Work Schedule Select the employee's work schedule for the defined period.

Holiday Schedule Select the employee's holiday schedule for the defined period. Even if employees have different work schedules, they typically share the same holiday schedule.

Important! For absence processing to work, you must enter a holiday schedule.

Change or add work schedules for employees as necessary. If an employee's job changes during the year, enter a new row of data with the new effective date and schedule. When the new schedule becomes effective, all of the employee's data is mapped to the new work schedule. Benefits processing, absence processing, and the calendar reflect the new schedule.

Note. Verify existing begin and end dates for the current work schedules before entering new ones. Each new begin date in the calendar is interpreted as the beginning of a new work schedule.

Setting Up Vacation Benefit Plans

This section discusses how to:

1. Set up vacation providers.
2. Add vacation benefit plans.
3. Define entitlement rules.
4. Add vacation plans to benefit programs.

Pages Used to Set Up Vacation Benefit Plans

Page Name	Object Name	Navigation	Usage
Benefit Plan Table	BENEFIT_PLAN_TABLE	Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Benefit Plan Table	Define the basic vacation benefits' criteria.
Vacation Plan Table	ABSV_PLAN_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Vacation Plan Table	Define the entitlement rules for accruing vacation leave time for each vacation benefit plan.

See Also

Chapter 3, "Setting Up Absence Data," Adding Vacation Benefit Plans, page 19

Chapter 3, "Setting Up Absence Data," Adding Vacation Plans to Benefit Programs, page 21

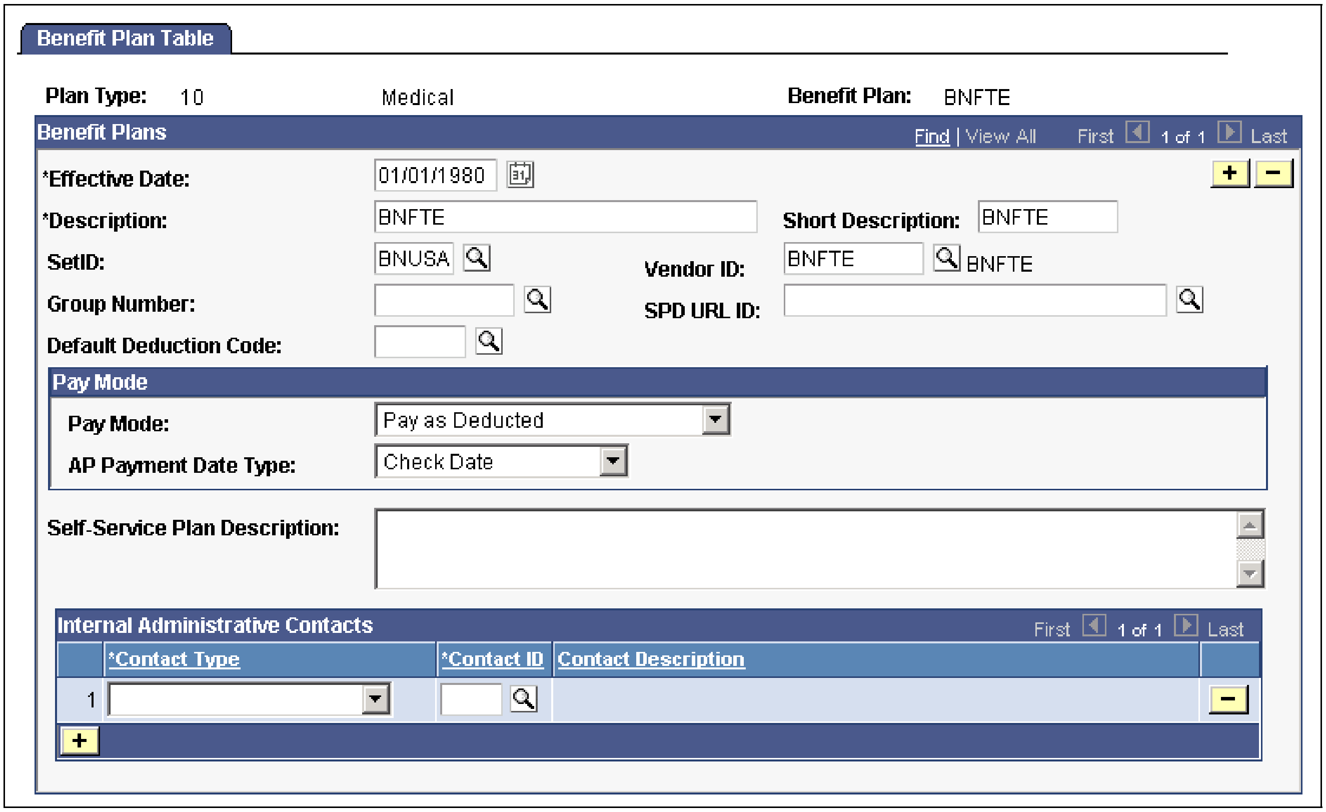
PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Vendors"

Setting Up Vacation Providers

For vacation plans, you can set up your organization as the provider.

Adding Vacation Benefit Plans

Access the Benefit Plan Table page.



Benefit Plan Table page

This page is fully documented in the *PeopleSoft Human Resources: Base Benefits PeopleBook.* It is included in the PeopleSoft Human Resources Monitor Absence setup menu for your convenience.

Set up distinct vacation plans for different accrual schedules.

Note. The following fields are required for PeopleSoft Human Resources Monitor Absence vacation plans; the remaining fields apply to other benefit plans.

Plan Type For vacation plans, select the plan type *Vacation* to access the page.

> **Note.** The recommended plan type is Vacation; this plan type is delivered with PeopleSoft Human Resources for vacation processing. Adding or changing plan types often involves complex updates to associated processing logic.

Benefit Plan Displays the benefit plan ID that you entered to access this page.

Vendor ID Select an ID from the list of providers. If the provider does not appear on the list, go to the Provider table and add it.

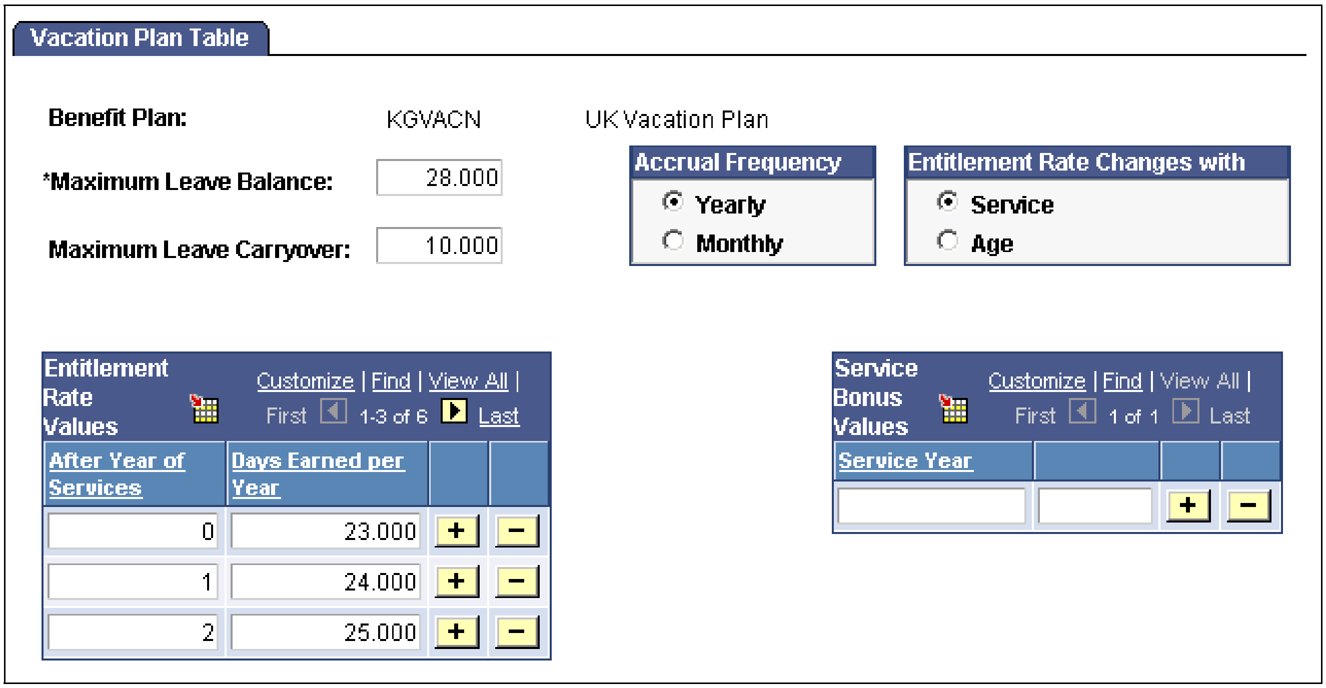
Important! For a provider to be valid for a particular benefit plan, that provider must be on the Provider table with an effective date that is the same as or prior to the effective date of the benefit plan in question.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, "Setting Up Benefit Plans," Defining Benefit Plans

Defining Entitlement Rules

Access the Vacation Plan Table page.



Vacation Plan Table page

Benefit Plan Displays the name of the vacation plan.

Maximum Leave Balance Enter the maximum number of days employees can hold in any one period.

Maximum Leave Carryover Enter the maximum number of days employees can carry into the next period.

Accrual Frequency Select the length of the accrual period and how often the process should be run. The default is *Yearly,* but you can change it to *Monthly,* if necessary.

Changing the accrual frequency changes the period prompt in the Entitlement Rate Values and Service Bonus Values group boxes.

Entitlement Rate Changes with Select either *Service* or *Age.* When you do, the prompt under the Entitlement Rate Values group box changes.

Entitlement Rate Values

Enter the vacation entitlement schedule under this plan in the Entitlement Rate Values group box according to the employee's length of service or age, depending on your selection in the Entitlement Rate Changes with group box.

Service Bonus Values

Enter bonus accruals based only on completion of years of service. Enter figures to three decimal places. The amounts are either per year or per month, depending on your selection in the Accrual Frequency group box.

Adding Vacation Plans to Benefit Programs

Access the Benefit/Deduction Program Table page.

Note. Many of the fields on this page do not apply to vacation plans.

After defining vacation plans, you must include them in a benefit program. Benefit programs combine various benefit plans into a single program. For example, a benefit program for salaried employees might include a vacation plan, company car plan, and maternity leave plan. When you set up employees, you assign them a benefit program. Later, when you enroll employees in a benefit plan, your plan choices include only those available in the benefit program assigned to the employee.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, "Building Base Benefit Programs"

CHAPTER 4

Tracking General Absences

This chapter lists common elements and discusses how to:

- Track general absence data.
- Review absence summaries.

Common Elements Used in This Chapter

Begin Date	Enter the date that the absence began.
End Date/Time	Enter the date and time that the absence ended.
Absence Type	Select a type of absence. The available absence types depend on how you set up the system.
Absence Code	Select a code that provides more detailed information about the type of absence.

Tracking General Absence Data

Use the General Absence component to enter and track all general employee absences—the actual absent time, any follow-up activities related to the absence, and any comments about the absence.

Note. Though you can track all general absences using this component, we've provided dedicated pages for those instances where your regulatory or legislative practices require you to track certain absences in detail. For example, for UK employees, you can track UK maternity leave by using the UK Maternity Leave page.

This section discusses how to:

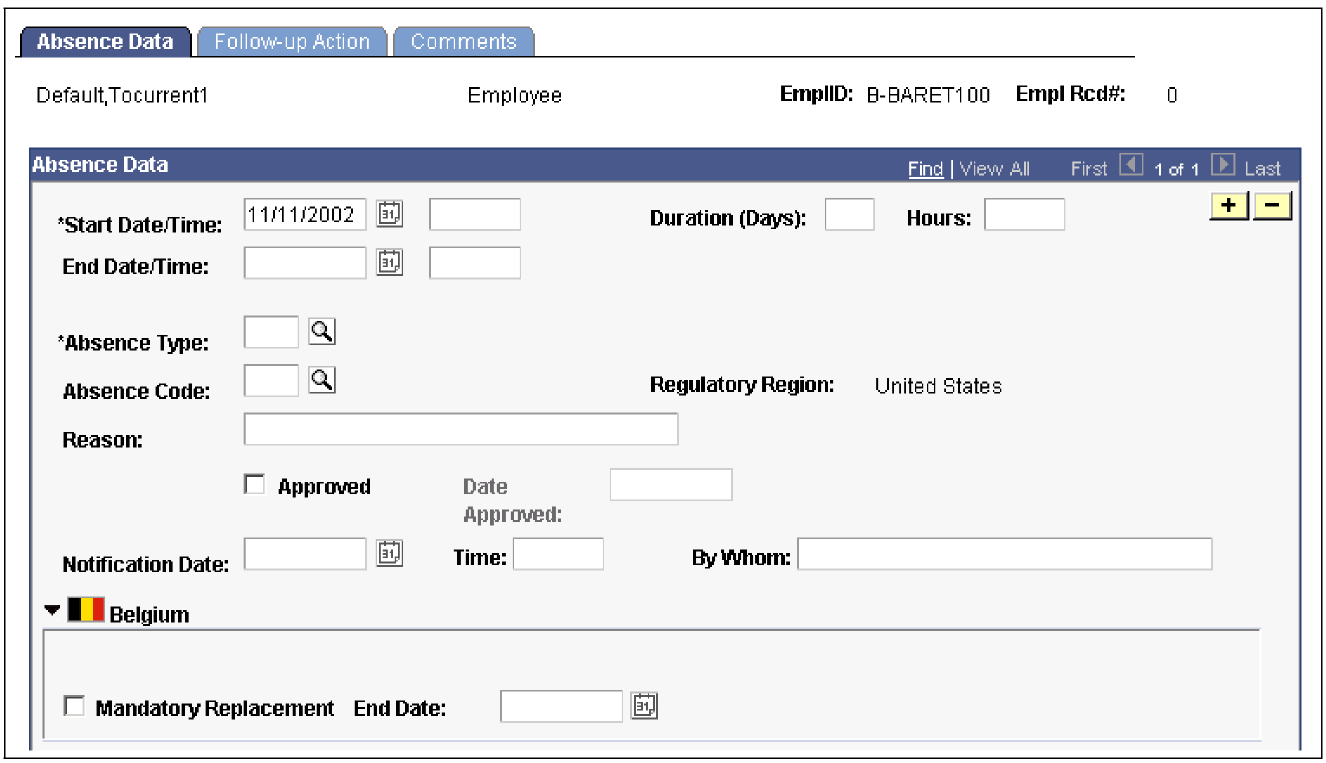
- Enter absence data.
- Enter follow-up actions.
- Record comments about an absence.

Pages Used to Track General Absence Data

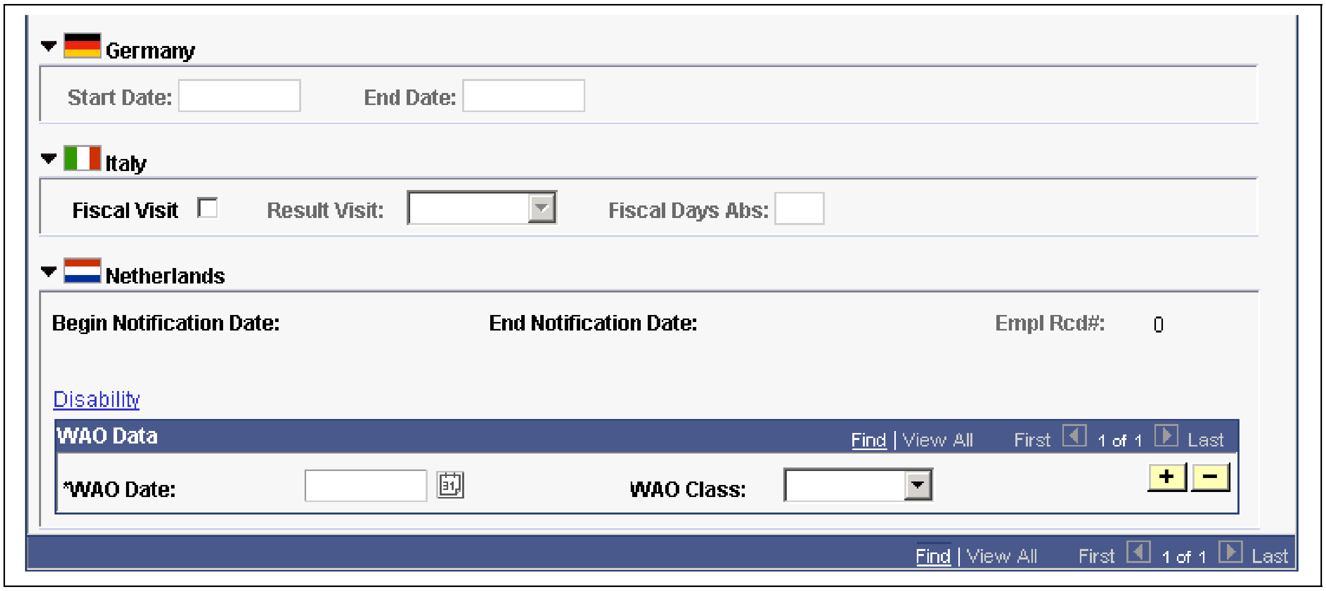
Page Name	Object Name	Navigation	Usage
Absence Data	ABSENCE_HISTORY	Workforce Administration, Absence and Vacation, Track Absence History, Create/Update Absence, Absence Data	Enter the details of the absence. For a vacation absence, use the Vacation Request page instead.
General Absence - Follow-up Action	ABSENCE_HISTORY2	Workforce Administration, Absence and Vacation, Track Absence History, Create/Update Absence, Follow-up Action	Enter any follow-up details and subsequent actions required for the absence, such as whether the illness is work-related or due to an ongoing illness.
General Absence - Comments	ABSENCE_HISTORY3	Workforce Administration, Absence and Vacation, Track Absence History, Create/Update Absence, Comments	Record comments about the employee's absence.

Entering Absence Data

Access the Absence Data page.



Absence Data page (1 of 2)



Absence Data page (2 of 2)

Start Date/Time Enter the beginning date and time of the absence.

Duration (Days) Displays the total duration of the absence in days and hours. You can override this system calculation.

Note. The duration that the system calculates takes into consideration the employee's work and holiday schedule. Therefore, it isn't the elapsed time between the start and end dates for the absence, but actual work days/hours lost from work due to sickness.

Absence Type Select the type of absence. If you select *Maternity,* a link to the Maternity Dates page appears.

Regulatory Region Displays the employee's regulatory region.

Reason Enter a detailed reason for the absence.

Approved Select to indicate the status of the absence.

Date Approved If applicable, enter the date the absence was approved.

Notification Date, Time, By Whom Enter the date and time that the absence was first reported and the person who reported it.

(BEL) Belgium

Mandatory Replacement Select to indicate whether a replacement is required for this absence. This applies to structural absences only.

End Date Enter a date defining the period during which it is required to have a replacement for the absent employee.

(DEU) Germany

Start Date Enter the beginning of the employee's maternity leave.

End Date Enter the end of the employee's maternity leave.

(ITA) Italy

Fiscal Visit Select if a doctor's visit is required to verify the employee's illness.

Result Visit Select to indicate the result of the doctor's visit.

Fiscal Days Abs (fiscal days absent) Enter the number of fiscal days the employee will be absent, as determined by the doctor.

(NLD) Netherlands

Begin Notification Date Enter the date that the illness absence was reported to the Arbeidsomstandigheden (ARBO) service provider.

End Notification Date Enter the date that the end of the illness absence was reported to the ARBO service provider.

Disability Click this link to access the Disability page if the absence is related to a disability.

WAO Date (Wet Arbeids Ongeschiktheid date) Enter the date that the percentage of physical disability was measured.

WAO Class (Wet Arbeids Ongeschiktheid class) Enter the percentage of physical disability for the employee in performing job duties. This percentage value is measured on the date specified, according to Dutch disability law requirements.

See Also

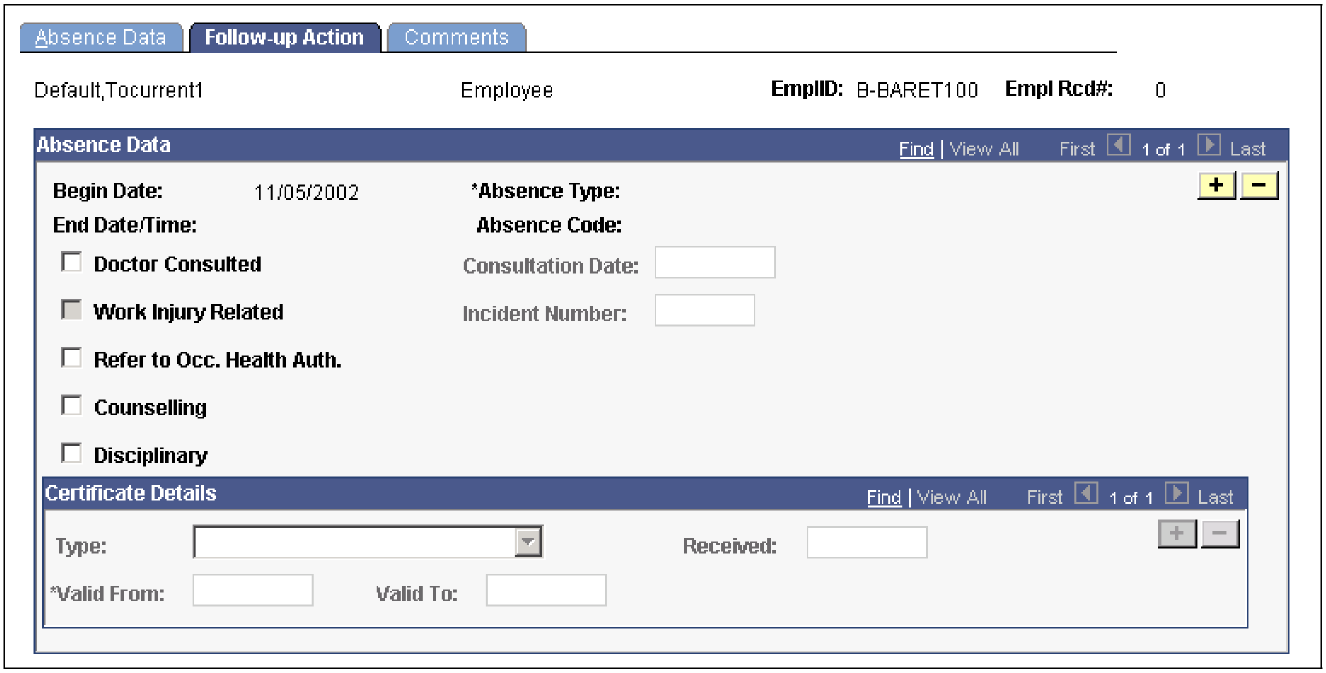
Chapter 5, "Tracking Vacations," Entering Vacation Requests, page 38

Chapter 3, "Setting Up Absence Data," Understanding Absence Data, page 5

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

Entering Follow-Up Actions

Access the Follow-up Action page.



Follow-up Action page

Doctor Consulted Select if you contacted the employee's doctor about the absence.

Consultation Date Enter the date that you contacted the doctor.

Work Injury Related Select if the absence is related to a work injury.

Incident Number If you selected Work Injury Related, enter the incident number that was assigned. Complete this field if you use the Health and Safety module of PeopleSoft Human Resources. Options include all incidents entered into the Health and Safety module.

Note. To track absence data about work-related injuries, set up the system to monitor such information.

Refer to Occ. Health Auth. (refer to occupational health authority) Select if follow-up action with the Occupational Health Authority is appropriate.

Counseling Select if follow-up counseling is appropriate.

Disciplinary Select if disciplinary action is appropriate.

Certificate Details

Type If you receive certification for a follow-up action, enter the type of certification. Options are:

Medical Certificate: A certificate received from the absent employee's physician.

Self Certificate: A certificate received from the employee.

Received Enter the date that you received the certificate.

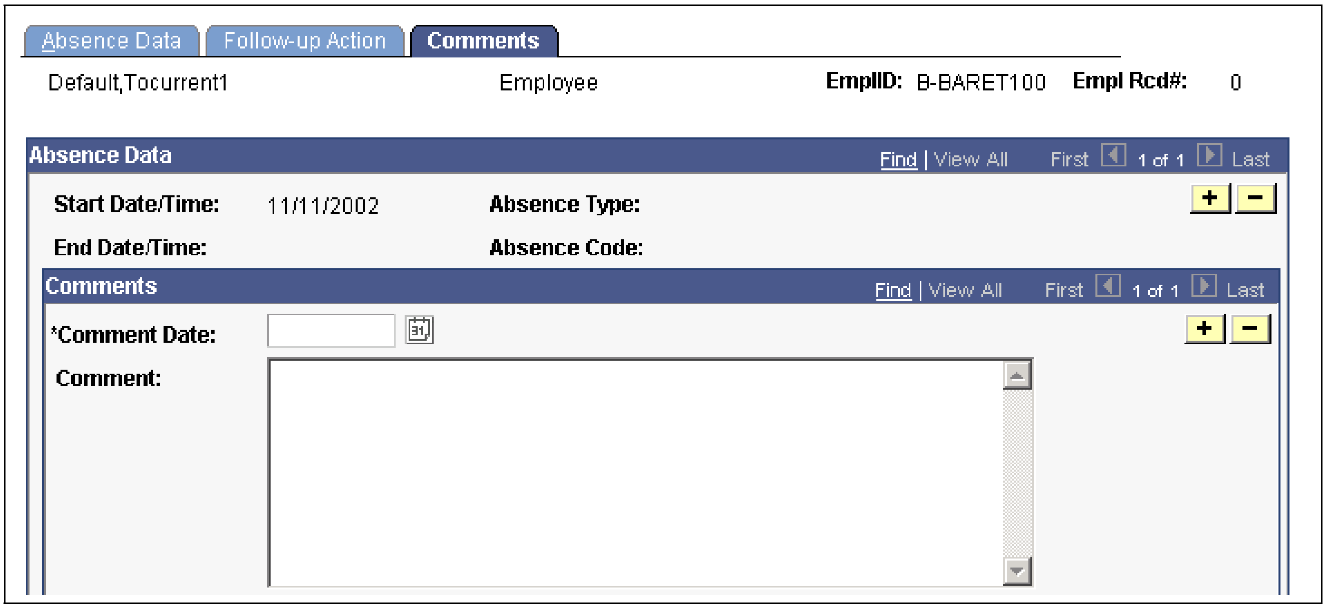
Valid From, Valid To Enter from and to dates for the certification so that you can track the need to obtain additional certification for ongoing illnesses.

See Also

Chapter 3, "Setting Up Absence Data," Understanding Absence Data, page 5

Recording Comments About an Absence

Access the Comments page.



Comments page (1 of 2)

Comments page (2 of 2)

(NLD) Netherlands

Percentage Ill (percentage illness)	Enter a percentage indicating how ill the employee is. This option is especially useful for a long periods of illness because it enables you to gauge the employee's return to full-time work.
Therapy Hours	Enter the number of hours that the employee is undergoing therapy.
Same Address as Employee and **Same Phone as Employee**	Select if the absent employee is convalescing or rehabilitating at home. The employee's personal address appears in the address fields and the fields are unavailable for entry. To change the employee's address, use the Personal Data pages in the Administering Your Workforce component. If the absent employee is convalescing or rehabilitating at a different address, such as a clinic or hospital, leave the check box blank.
Contact Phone	Enter a telephone number to contact the employee.

Reviewing Absence Summaries

PeopleSoft delivers summary pages for you to review employee history of absences for all reasons, including vacations and sickness. Reviewing this information can help you spot absence trends and patterns.

This section provides an overview of absence indicators and discusses how to view absences on the calendar.

Understanding Absence Indicators

When you set up absence parameters, you defined absence calendar options for the calendar. There are two types of indicators that appear on the calendar:

- Continuing absence indicator.

  If you enter an absence with no end date, you see the continuing absence indicator. It means that the absence does not yet have an end date entered.

- Multiple absence indicator.

  If you enter more than one absence for a particular day for an employee, you see the multiple absence indicator. It means that there is more than one instance or type of absence entered for the employee (for example, a combination of sick leave and personal leave).

Pages Used to Review Absence Summaries

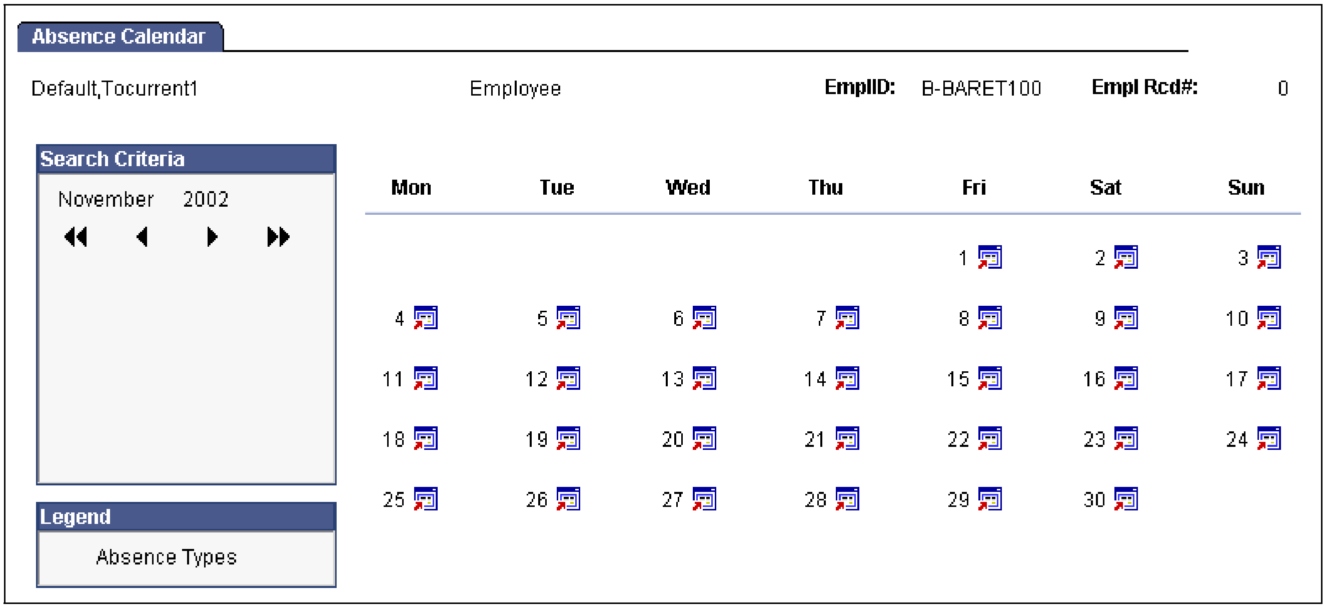
Page Name	Object Name	Navigation	Usage
Absence Calendar	ABSENCE_CALENDAR	Workforce Administration, Absence and Vacation, Track Absence History, Review Absence Calendar, Absence Calendar	View an employee absence in graphical format.
Legend - Absence Type	ABS_TYPE_SEC	Click the Absence Types link in the Legend box on the Absence Calendar page.	View a definition of all calendar images present on the calendar for the month.
Absence Summary by Employee	ABS_SUM_EMPL	Workforce Administration, Absence and Vacation, Track Absence History, Summary by Employe, Absence Summary by Employee	View a list of all absences for an employee.
Absence Summary by Department	ABS_SUM_DEPT	Workforce Administration, Absence and Vacation, Track Absence History, Summary by Department, Absence Summary by Department	View all absences within a department.
Absence Summary by Department Tree	ABS_SUM_DEPT2	Workforce Administration, Absence and Vacation, Track Absence History, Summary by Dept Tre, Absence Summary by Department Tree	View all absences within a department and subordinate departments.
Create Statistics	RUNCTL_ABS702_NL	Workforce Administration, Absence and Vacation, Absence Reports, Create Illness Statistics, Create Statistics	Create absence statistics for a company in the Netherlands. Run this process before creating an Illness Registration report. Run for a certain month of the year.
Parental Leave	ABS_PAR_EE_INQ_UK	Workforce Administration, Absence and Vacation, Maternity/Parental Leave UK, Review Parental Leave by Emp, Parental Leave	View a list of all parental leave absences for all dependents by employee. The list can be printed and passed on to the individual's next employer if requested.
Parental Leave by Dept (parental leave by department)	ABS_PAR_DEPTINQ_UK	Workforce Administration, Absence and Vacation, Maternity/Parental Leave UK, Review Parental Leave by Dept	View a list of parental leave absences for a department, by employee ID.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports," Monitor Absence Reports

Viewing Absences on the Calendar

Access the Absence Calendar page.



Absence Calendar page

For each day on which an absence occurred, the system shows a graphical image (if there is a graphical image for that type of absence). If there is no image defined, nothing appears on the calendar.

Click a date or graphical image to view the page with details of a particular absence.

Search Criteria

The month and year shown in the calendar are identified in this group box. Use the buttons to navigate from one month to another:

Navigate to the same month of the previous year.

Navigate to the previous month.

Navigate to the next month.

Navigate to the same month of the following year.

Legend

Absence Types Click to access the Legend - Absence Types page, which provides a definition of all calendar images present on the calendar for the month.

See Also

Chapter 4, “Tracking General Absences,” Tracking General Absence Data, page 23

Chapter 3, “Setting Up Absence Data,” Defining Parameters for Tracking Employee Absence, page 9

Running Employee Absence Reports

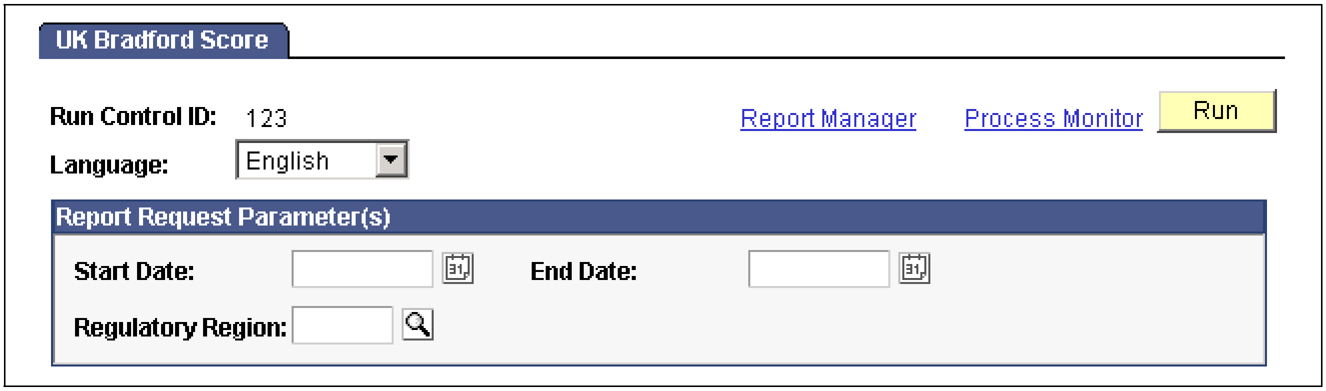
This section discusses how to run the Bradford Score report.

Pages Used to Run Employee Absence Reports

Page Name	Object Name	Navigation	Usage
Absence Listing	RUNCTL_ABS001	Workforce Administration, Absence and Vacation, Absence Reports, Absence Listing	Run the Absence Listing report (ABS001) that provides information about an employee’s absence history. Run the Refresh Employees Table process before running this report.
Absence Spells	RUNCTL_FROMTHRU	Workforce Administration, Absence and Vacation, Absence Reports, Absence Periods, Absence Spells	Run the Absence Periods report (ABS002) that provides information about the number of employee absence periods.
Time Lost due to Absence	RUNCTL_ABS003	Workforce Administration, Absence and Vacation, Absence Reports, Time Lost Due to Absence	Run the Time Lost Due to Absence report (ABS003) that provides employee absence information. **Note.** Run the Refresh Employees Table process before running this report.
UK Bradford Score	RUNCTL_ABS004UK	Workforce Administration, Absence and Vacation, Absence Reports, Bradford Score GBR, UK Bradford Score	(GBR) Run the Bradford Score report (ABS004UK). This report lists employee absences for the regulatory region of UK 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.

(GBR) Running the Bradford Score Report

Access the UK Bradford Score page.



UK Bradford Score page

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^2B

Note. Run the Refresh Employees Table process before running this report.

Regulatory Region Select the UK regulatory region for the report. If you set up regulatory regions for parts of the UK, you can run the report for a region such as Scotland or Wales.

Leave this field blank if you want the report to cover all employees who work for UK companies.

CHAPTER 5

Tracking Vacations

This chapter discusses how to manage:

- Vacation accruals.
- Vacation absences.

Managing Vacation Accruals

This section discusses how to:

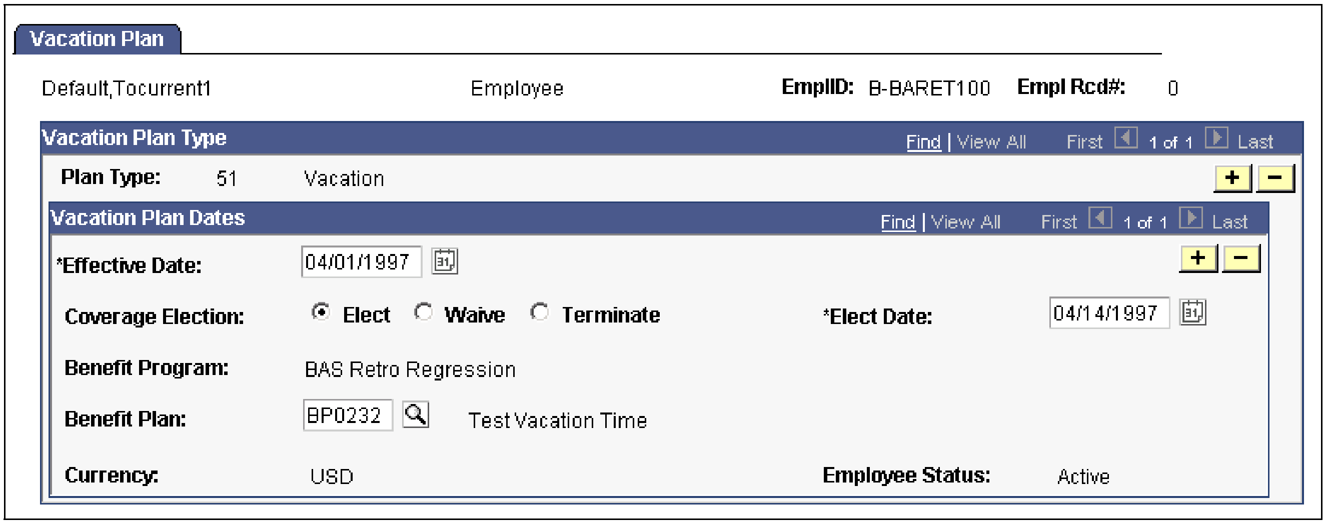
1. Assign vacation plans to employees.
2. Update employee vacation accruals.

Pages Used to Manage Vacation Accruals

Page Name	Object Name	Navigation	Usage
Vacation Plan	ABSV_PLANS	Workforce Administration, Absence and Vacation, Create Vacation Schedule, Vacation Plan	Assign vacation plans to employees.
Vacation Accrual Process	RUNCTL_ABS701	Workforce Administration, Absence and Vacation, Create Vacation Schedule, Accrue Vacation, Vacation Accrual Process	Run the Vacation Accrual process to update employees' accrual records by company and vacation benefit plan.

Assigning Vacation Plans to Employees

Access the Vacation Plan page.



Vacation Plan page

Plan Type Displays the vacation plan type. By default, the type is Vacation.

Coverage Election Select the coverage election. Options are:

Elect: The employee uses the plan.

Waive: The employee waives the plan.

Terminate: The employee terminates coverage.

Elect Date Enter the date the coverage election takes place.

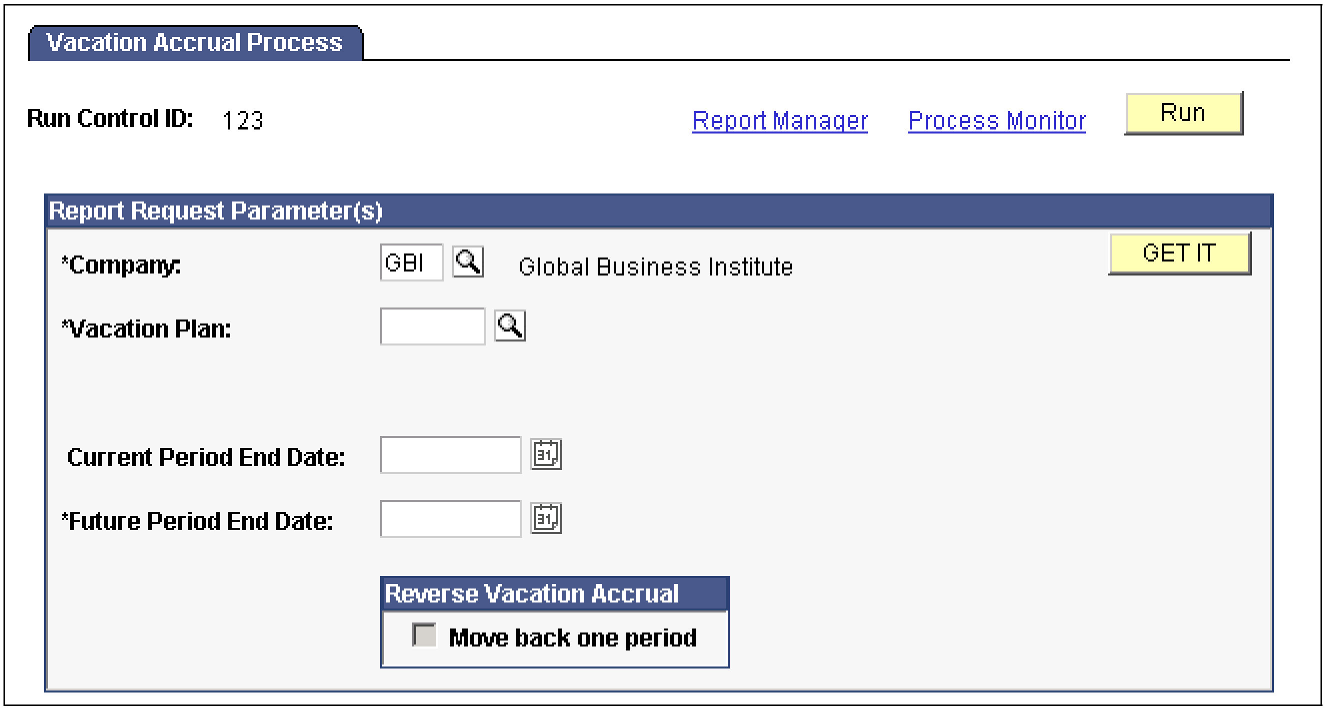
Benefit Program Displays information about the employee’s benefit program.

Benefit Plan Select the vacation benefit plan from the values in the Benefit Plan table.

Currency Displays the currency associated with the benefit plan.

Updating Employee Vacation Accruals

Access the Vacation Accrual Process page.



Vacation Accrual Process page

Vacation Plan Select the name of the vacation plan.

Current Period End Date If you've run the Vacation Accrual process before, the system sets the Current Period End Date field to that run's future period end date and makes the field display-only. It also sets the new future period end date to one year or month (depending on the accrual frequency value) from the current period end date.

Managing Vacation Absences

This section discusses how to:

1. Enter vacation requests.
2. Approve vacation requests.
3. Track vacation absence data.

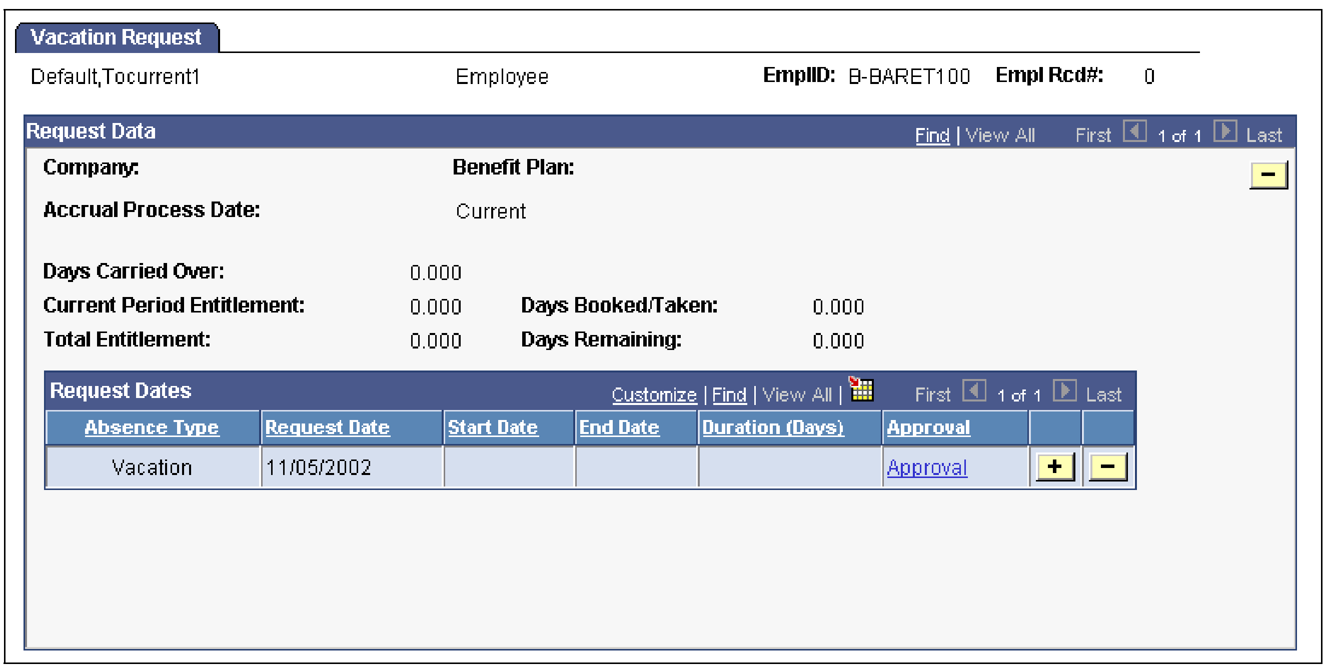
Pages Used to Manage Vacation Absences

Page Name	Object Name	Navigation	Usage
Vacation Request	ABSV_REQUEST	Workforce Administration, Absence and Vacation, Create Vacation Schedule, Request/Approve Vacation, Vacation Request	Enter vacation requests, mark requests as approved, and enter additional tracking information about approvals.
Vacation Approval	ABSV_REQ_SEC	Click the Approval link on the Vacation Request page.	Indicate vacation approval.
Vacation Absence	ABSENCE_VACATION	Workforce Administration, Absence and Vacation, Create Vacation Schedule, Capture Vacation Absence, Vacation Absence	Track vacation absence data for your employees.

Entering Vacation Requests

Access the Vacation Request page.

Note. Before you book vacation requests for an employee, make sure the employee's accrual records are current by running the Vacation Accrual process.



Vacation Request page

Accrual Process Date Displays the current end date that you selected on the Vacation Accrual Process page before running the process.

Days Carried Over Displays the days carried over from the last entitlement period.

Current Period Entitlement Displays the current entitlement, which the system calculates according to the information in the Vacation Plan table. It is calculated after the system runs the Vacation Accrual process for the current period.

Days Booked/Taken Displays the days booked or taken. Until the request is approved, this field is dynamically updated as you enter the start and end dates.

Total Entitlement Displays the total entitlement of vacation days, as updated by the Vacation Accrual process.

Days Remaining Displays the days remaining. Until the request is approved, this field is dynamically updated as you enter the start and end dates.

Absence Type Select the absence type for this request.

Request Date Enter the request date for the vacation. The default is the current date.

Start Date Enter the vacation start date for the request.

End Date Enter the vacation end date for the request.

Duration (Days) Displays the duration of the absence. The duration is not the difference between the start and end dates. The system compares the dates to the employee's work and holiday schedules and calculates the number of actual work days that the employee missed. You can override this value.

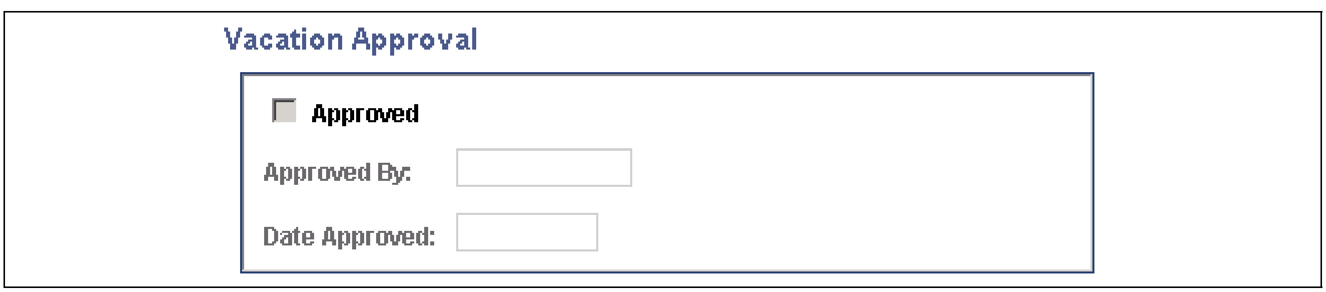
Approval Click to access the Vacation Approval page. You can save a vacation request prior to approval, or you can approve the request.

See Also

Chapter 5, "Tracking Vacations," Updating Employee Vacation Accruals, page 36

Approving Vacation Requests

Access the Vacation Approval page.



Vacation Approval page

Approved Select to approve the request.

Approved By Select the approver's employee ID.

Date Approved Enter the date the request is approved.

Tracking Vacation Absence Data

Access the Vacation Absence page.

Vacation Absence page

Note. Deleting a row in the Vacation Absence page doesn't delete a row on the Vacation Request page and doesn't reduce the number of days booked or taken by the employee.

Begin Date	The values in the Begin Date, End Date, and Duration (Days) fields come from the Vacation Request page and are display-only.
Absence Type	Select the absence type.
Reason	Enter a reason for the vacation.

CHAPTER 6

(NLD) Dutch Illness Reporting

This chapter provides an overview of Dutch illness reporting and discusses how to enter data for Dutch illness reporting.

Understanding Dutch Illness Reporting

Companies registered under a Dutch Industrial Insurance Board (*Bedrijfsvereniging*) must report daily illness absences for workers employed under Dutch regulations. Absence reporting is made to the *Arbeidsomstandigheden* (ARBO)—or working conditions—service providers under the Dutch Occupational Health and Safety Act. PeopleSoft uses an interface to the third-party organization, ViaPrisma, that operates as an intermediary between companies and the ARBO service providers. ViaPrisma provides an application called Vpmeld, which communicates with any certified ARBO service provider.

The interface between PeopleSoft and Vpmeld includes a process that enables you to enter all required information within PeopleSoft; Vpmeld handles the validation and messaging.

PeopleSoft provides three processes for extracting and reporting illness absence information. All of these processes make import files for Vpmeld, based on the import definition of Vpmeld version 1.6. (They are compatible with version 1.7, as well.) The files are generated in the %PS_SERVDIR directory with automatically assigned sequence numbers.

PeopleSoft transfers the following information to Vpmeld, which then handles subsequent transactions with the applicable organizations:

- All company-related and employee-related information from the PeopleSoft database.
- All illness notifications, including initial notifications, updates, and corrections.
- All illness-end notifications, including initial notification, updates, and corrections.

Note. Only absence information with absence types of 501, 502, 503, 504, 505, 506, and 507 is captured for processing.

Prerequisites

Before you can use the Dutch illness reporting features, you must make the following modifications to the system:

- The interface relies on a valid company registration number available on the Company Table - Default Settings page; in the section for The Netherlands, select the Industrial Insurance Board and enter the registration number.

- For each employee, a valid Dutch Social Fiscal Number must be available; enter this information on the Personal Data - Eligibility/Identity page.

Common Elements Used in This Chapter

From Date Select the date from which to start extracting information.

Absence Type Displays the absence type, as defined on the Absence Type page.

Note. Only absence information with absence types of 501, 502, 503, 504, 505, 506, and 507 is captured for processing.

Absence Code Displays the absence code, as defined on the Absence Type page.

Begin Date Enter the date that the absence begins.

Return Date Enter the date that the absence ends.

Begin Notification Date Enter the date that notification of the illness absence was sent to Vpmeld.

End Notification Date Enter the date that notification of the end of the illness absence was sent to Vpmeld.

Entering Data for Dutch Illness Reporting

Use the pages in the Process Absence Data NLD (process absence data Netherlands) component to report on absence information for The Netherlands.

This section discusses how to:

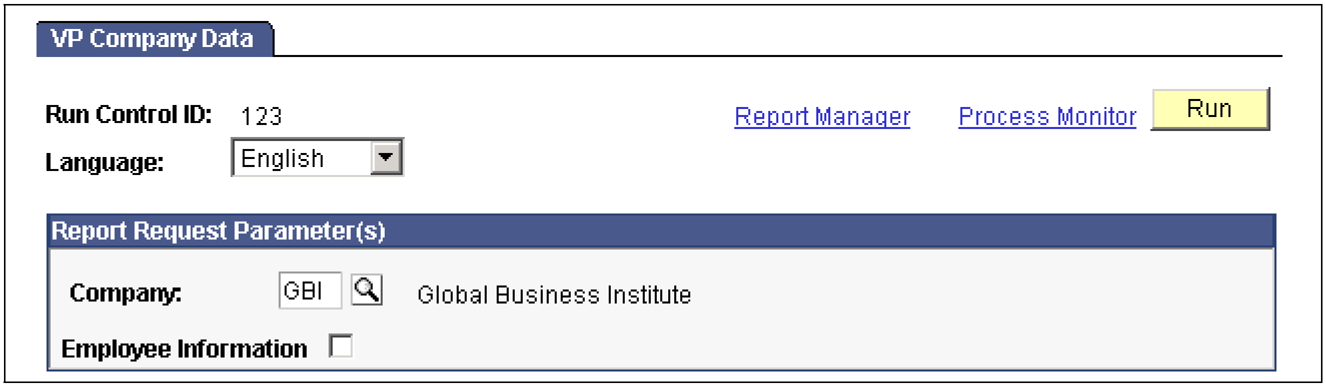
- Extract company name and address information.
- Extract and report illness notification data by employee.
- Extract and report notifications for previously unreported absences.
- Run the illness registration reports.

Pages Used to Enter Data for Dutch Illness Reporting

Page Name	Object Name	Navigation	Usage
VP Company Data (ViaPrisma company data)	PRISMA_COMP_RUNCTL	Workforce Administration, Absence and Vacation, Process Absence Data NLD, Export Company Data, VP Company Data	Extract company name and address information, with or without the personal information of the employees within the company. A process then generates an import file that can be loaded into Vpmeld to initialize or update the basic information for the company and personnel.
VP Employee Data (ViaPrisma employee data)	PRISMA_PERS_RUNCTL	Workforce Administration, Absence and Vacation, Process Absence Data NLD, Illness Notification, VP Employee Data	Extract and report illness notification data by employee.
VP Illness Data (ViaPrisma illness data)	PRISMA_ILL_RUNCTL	Workforce Administration, Absence and Vacation, Process Absence Data NLD, Illness Notification by Group, VP Illness Data	Extract and report illness begin or end notifications for all absences that weren't previously reported.
Illness Registration	RUNCTL_ABS005_NL	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD, Illness Registration	(NLD) Use this page to run these reports: • Illness Registration report (ABS005NL) that calculates the illness totals, percentages, and frequencies. • Illness Registration report (ABS006NL). Before you run these reports, first run the Create Statistics process.
Longterm Illness Report	RUNCTL_ABS007_NL	Workforce Administration, Absence and Vacation, Absence Reports, Longterm Illnesses NLD, Longterm Illness Report	(NLD) Use this page to run the Longterm Illness report (ABS007NL) from which the employee hasn't fully recovered and which cases are subject to the Dutch law *Poortwachter.* This report is also accessible through Global Payroll, Absence and Payroll Processing, Absence Reports, Longterm Illnesses NLD.

Extracting Company Name and Address Information

Access the VP Company Data page.



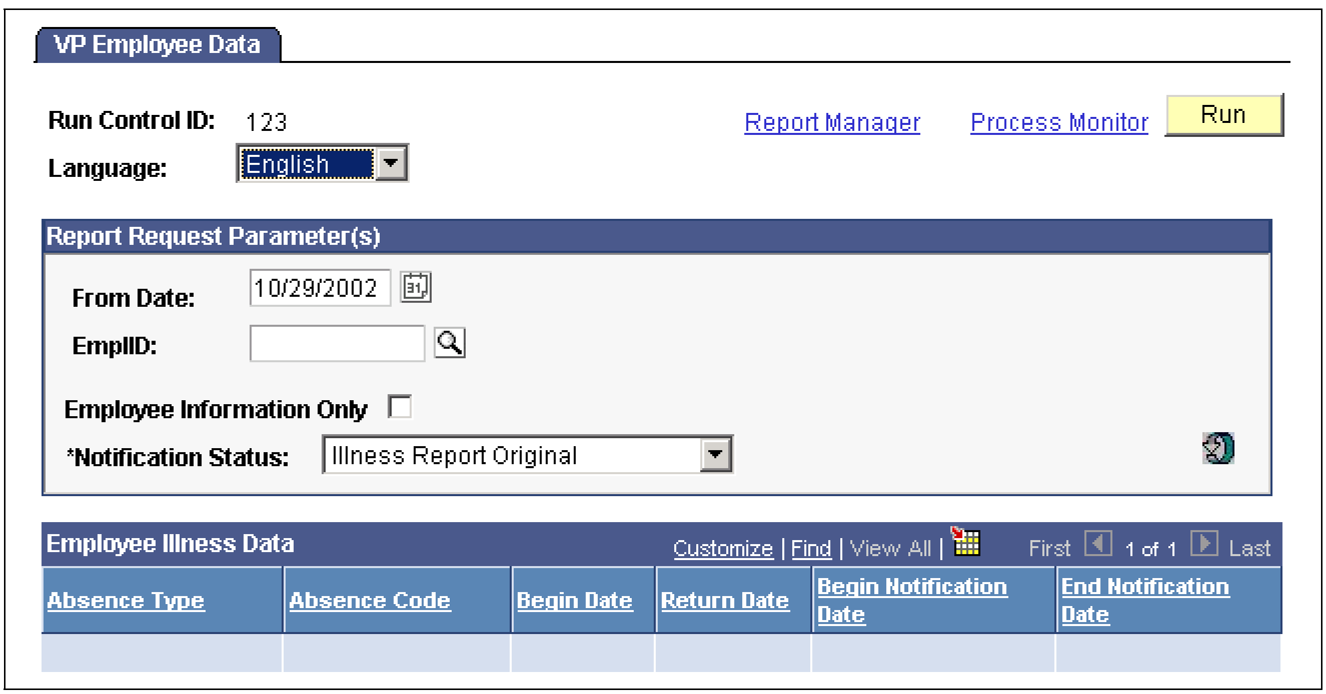
VP Company Data page

Company Select the company from which to extract information.

Employee Information Select to extract employee information associated with the company.

Extracting and Reporting Illness Notification Data by Employee

Access the VP Employee Data page.



VP Employee Data page

Report Request Parameters

Employee Information Only Select to extract employee information only, when you want to create or update the personal information for the employee. When you select this check box, the Illness Status Information field becomes unavailable for data entry.

Notification Status

Select the notification status. Options are:

Illness Report Change: Send an illness notification change to Vpmeld.

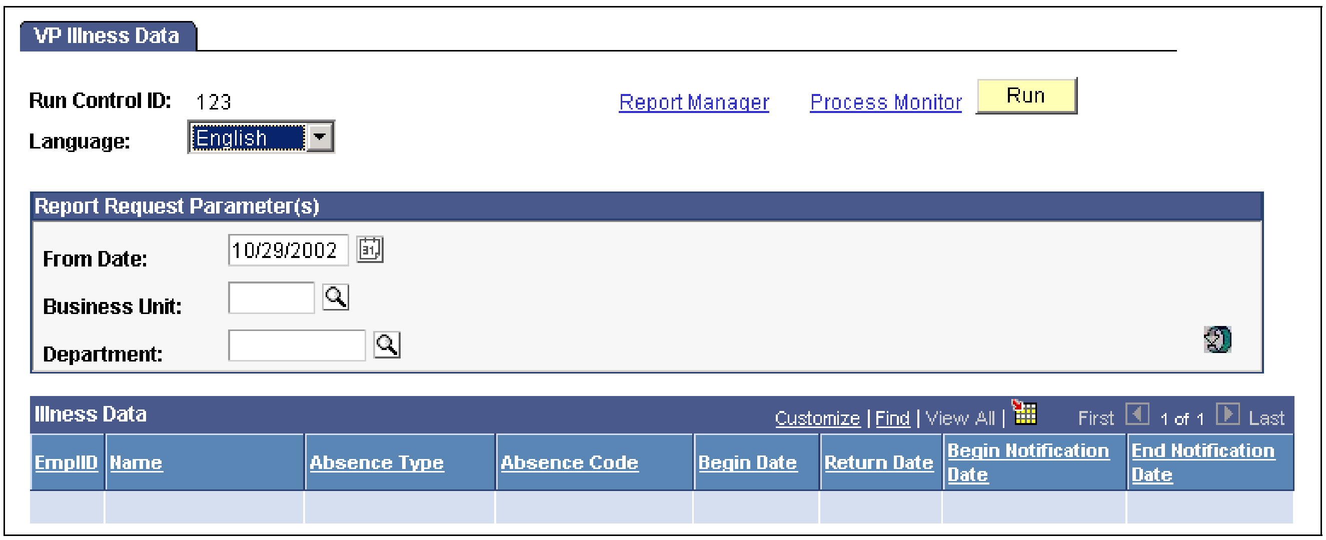
Illness Report Original: Send an original illness notification to Vpmeld. If you select this option, the report lists illness data in addition to employee information.

Illness Report Replace: Send an illness notification replacement to Vpmeld. If you select this option, the report lists illness data in addition to employee information.

Note. When you click the Refresh button, the system populates the remaining fields.

Extracting and Reporting Notifications for Previously Unreported Absences

Access the VP Illness Data page.



VP Illness Data page

Report Request Parameters

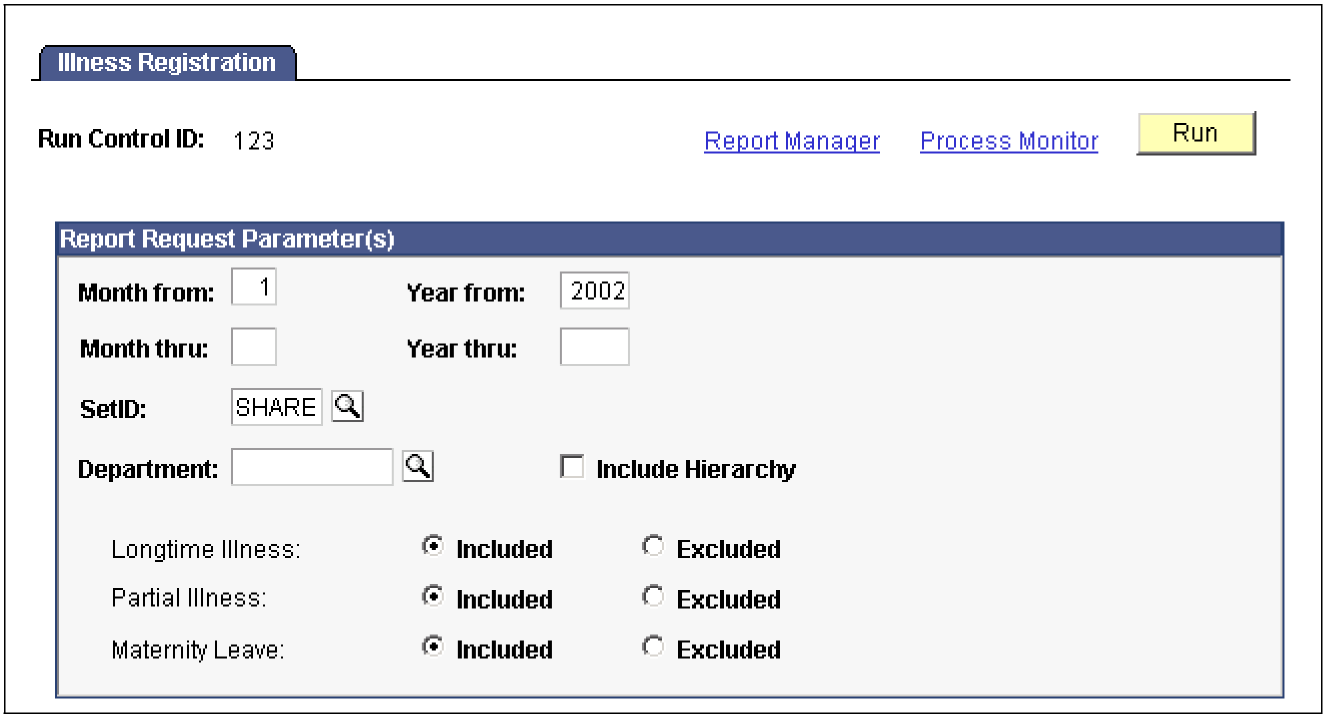
Department

Select a department for which to extract information. You must first select a business unit.

Note. When you click the Refresh button, the system populates the remaining fields.

Running the Illness Registration Reports

Access the Illness Registration page.



Illness Registration page

Month from and **Month thru** — Enter the beginning and ending months of the time period on which to report.

Year from and **Year thru** — Enter the beginning and ending years of the time period on which to report.

Include Hierarchy — Select to include departments within the selected department, based on the department security tree.

Longtime Illness — Select to include or exclude longtime illness. Options are:

Included: Include longtime illnesses in the report. An illness is considered to be longtime if the duration of the illness falls within the illness-length category Long, as specified in the absence parameters.

Excluded: Do not include longtime illnesses in the report.

An illness that becomes longtime within the reporting period is counted as an ended illness, and the system counts available employment days only until the day an illness becomes longtime.

The system does not report an illness that becomes longtime before the start of the reporting period, and the system does not calculate the employee's available employment days.

Partial Illness — Select to include or exclude partial illness. Options are:

Included: Include partial illnesses in the report.

An illness is considered to be partial while the illness percentage less than 100 percent, as specified in the General Absence parameters.

Excluded: Do not include partial illnesses in the report.

An illness that becomes partial within the reporting period after being a long time illness is counted as an ended illness.

An illness that becomes longtime after being partial is counted as a newly started illness.

Maternity Leave Select to include or exclude maternity leave in the report.

CHAPTER 7

(GBR) Tracking Maternity and Parental Leave

This chapter discusses how to track:

- Employee maternity absence data.
- Parental leave absence data.

Tracking Employee Maternity Absence Data

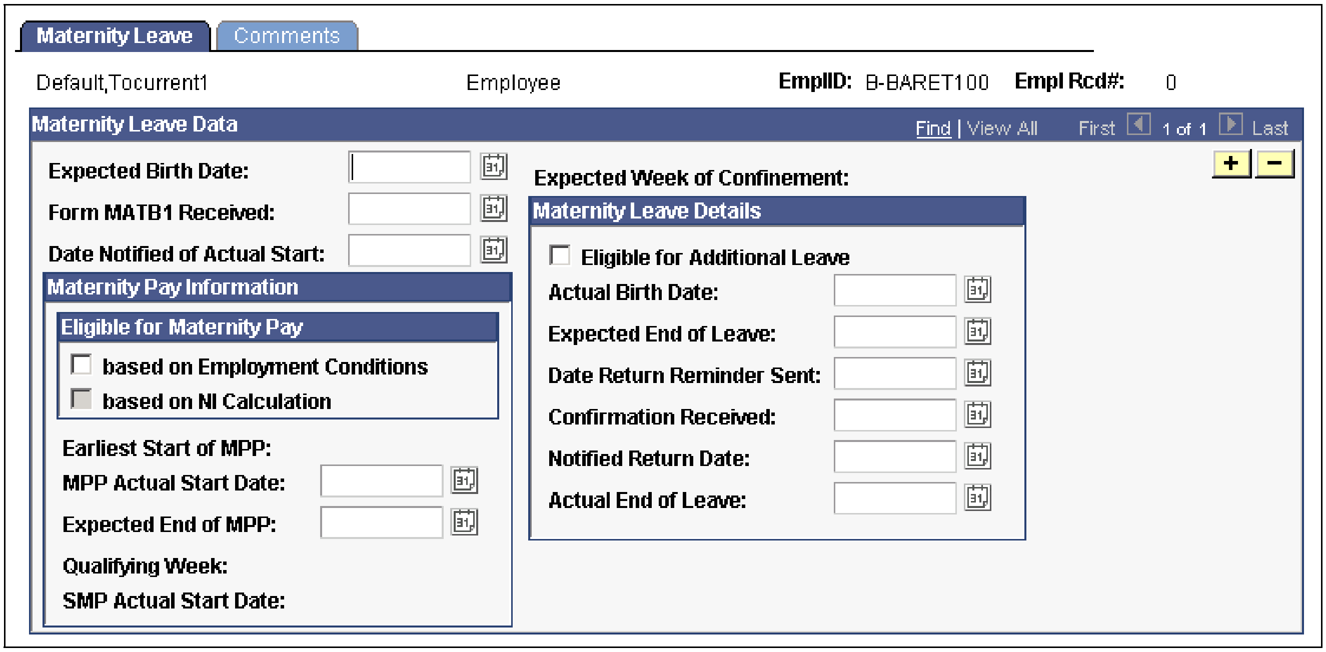
This section discusses how to track employee maternity absence data.

Pages Used to Track Employee Maternity Absence Data

Page Name	Object Name	Navigation	Usage
Maternity Leave	ABS_MATERNITY_UK	Workforce Administration, Absence and Vacation, Maternity/Paternal Leave UK, Maintain Maternity Leave, Maternity Leave	Track maternity absence data.
Comments	ABS_MAT_COM_UK	Workforce Administration, Absence and Vacation, Maternity/Paternal Leave UK, Maintain Maternity Leave, Comments	Record your comments about the record.

Tracking Employee Maternity Absence Data

Access the Maternity Leave page.



Maternity Leave page

Expected Birth Date

Enter the expected birth date as it appears on the MATB1 form or other official notification.

When you exit this field, the system completes the Expected Week of Confinement (EWC) field, the Earliest Start of MPP (earliest start of maternity pay period) field, and the Qualifying Week field. The system also calculates whether the employee is eligible for maternity pay based on employment conditions.

Form MATB1 Received

Enter the date that you receive medical evidence of the pregnancy.

Date Notified of Actual Start

Enter the date when the employee notified you of her intended leave start date.

Eligible for Maternity Pay

Based on Employment Conditions

By default, this check box is selected if the employee is eligible for maternity pay based on her employment history.

The system reviews the employee record for length of service and compares it to the qualifying data on the Absence Parameters page to see if she is eligible for maternity pay.

Based on National Insurance (NI) Calculation

This check box appears only if you have PeopleSoft Global Payroll UK installed.

A payroll process reviews the employee's average earnings and uses the expected week of confinement date to calculate whether the employee is eligible for maternity pay based on NI contributions. If the employee is eligible, the check box is selected by default. Remember that the process is run only at scheduled times, so you won't know whether the employee is eligible for maternity pay until you run the process.

Maternity Pay Information

Earliest Start of MPP (earliest start of maternity pay period)	Displays the earliest start of the maternity pay period. The system calculates the earliest date that the maternity pay period can start based on the information entered on the Absence Parameters page.
MPP Actual Start Date (maternity pay period actual start date)	Enter the last day the employee expects to work before the start of leave.
Expected End of MPP (expected end of maternity pay period)	Displays the expected end of the maternity pay period. The system automatically calculates the date when the maternity payments cease based on the earliest start of MPP date.
Qualifying Week	The system populates this field; it is unavailable for entry. The qualifying week is 15 weeks before the expected week of confinement. The system uses this date to determine if the employee is eligible for maternity pay.
SMP Actual Start Date (statutory maternity pay actual start date)	This field appears only if you have PeopleSoft Global Payroll for the UK installed. The statutory maternity pay actual start date is the first date that the employee is entitled to SMP. The system calculates this date based on the maternity pay period actual start date; this field is unavailable for entry.
Expected Week of Confinement	The system calculates the expected week of confinement, which begins on the Sunday of the week that the baby is due to be born. This field is unavailable for entry.

Maternity Leave Details

Eligible for Additional Leave	By default, this check box is selected if the employee is eligible for additional leave based on the additional maternity leave parameters on the Absence Parameters page. You can override the default as necessary.
Actual Birth Date	Enter the actual date on which the baby is born.
Expected End of Leave	The system calculates the expected end of leave based on length of service and the absence parameters. You can override the default date if necessary.
Date Return Reminder Sent	As the end date of the MPP approaches, you can send a return-to-work reminder to the employee. Enter the date in this field.
Confirmation Received	When you receive a reply from the employee, enter the date in this field.
Notified Return Date	Enter the date on which the employee informs you the employee will return to work.
Actual End of Leave	Enter the date on which the employee returns to work.

See Also

Chapter 3, “Setting Up Absence Data,” Defining Parameters for Tracking Employee Absence, page 9

Tracking Parental Leave Absence Data

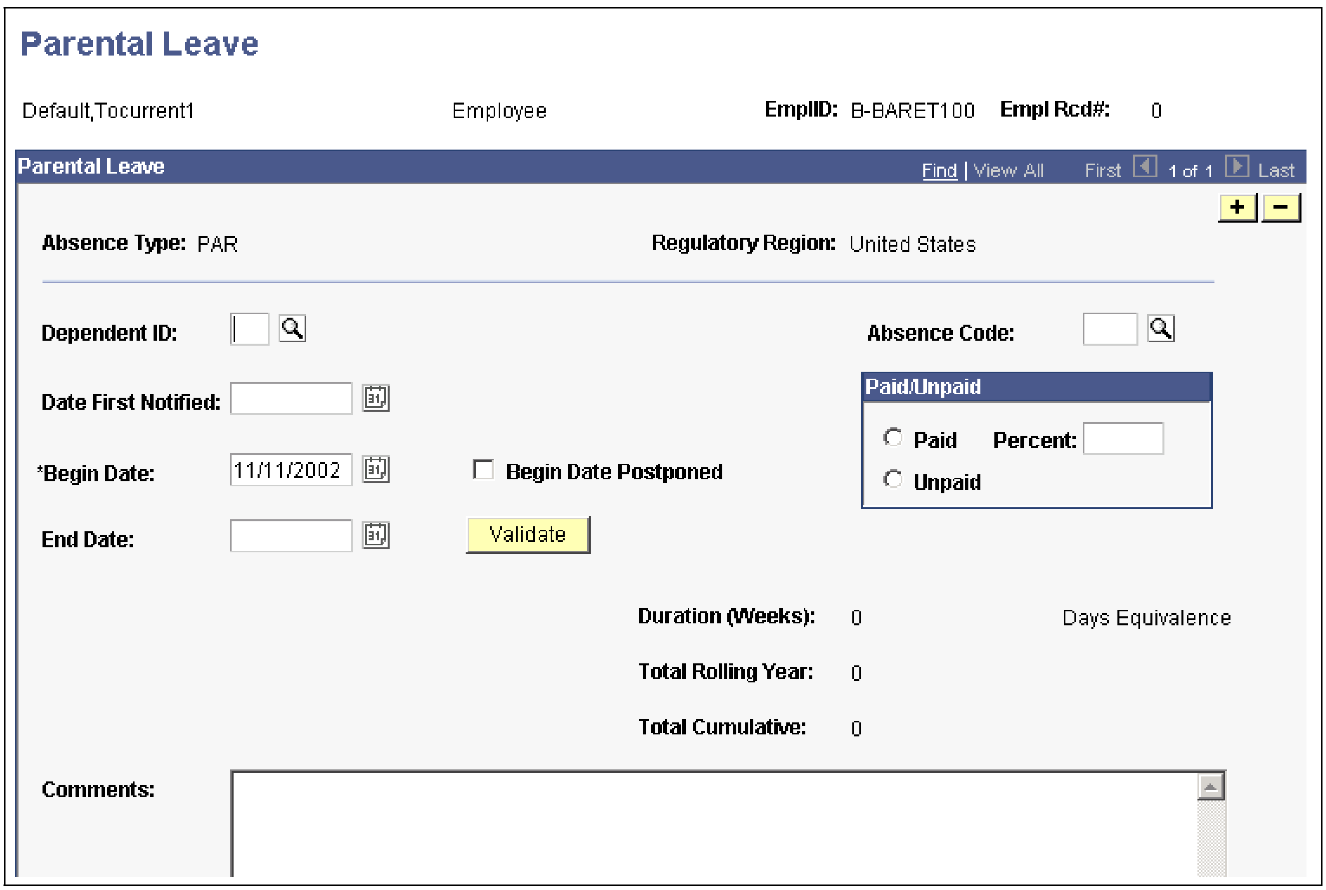
This section discusses how to track parental leave absence data.

Page Used to Track Parental Leave Absence Data

Page Name	Object Name	Navigation	Usage
Parental Leave	ABS_PARENTAL_UK	Workforce Administration, Absence and Vacation, Maternity/Paternal Leave UK, Maintain Parental Leave, Parental Leave	Track parental leave absence data.

Tracking Parental Leave Absence Data

Access the Parental Leave page.



Parental Leave page

Dependent ID Select the dependent from the list created during dependent data setup. The system displays the dependent's name as an active link to the dependent's Details page.

Absence Code Select the absence code from the Absence Code table for the parental leave.

Date First Notified	Enter the date that the employee notified the organization of the need for this leave.
Begin Date Postponed	Select if the leave is postponed after approval.
Paid or **Unpaid**	Select either *Paid* or *Unpaid* for this leave. If *Paid* is selected, enter the percentage of normal pay that the employee will receive.
Validate	After entering all of the leave information, click the Validate button to verify the leave against the parameters of Parental Leave and to calculate the duration of the leave in weeks and in days.
Duration (Weeks)	Displays the total number of weeks for this leave.
Total Rolling Year	Displays the total number of parental leave weeks taken for the past 12-month period from the begin date of the leave.
Total Cumulative	Displays the total number of parental leave weeks taken during the employee's present and past employment for each dependent.
Days Equivalence	Click the Days Equivalence link to access the weeks information expressed in days.

See Also

Chapter 3, "Setting Up Absence Data," Defining Parameters for Tracking Employee Absence, page 9

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 anotherand 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 methodit 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 *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* 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 activitys 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 youre 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 valuesdynamic detailsdirectly 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 *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations 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 *Enterprise Incentive Management ledger.* 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, *event* 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 *activity.*
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 *rates*) 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 applicationfor 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 addressesfor 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 locationindicated by a *1*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 *participant object.*

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 contextif 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 *Batch Processes.*

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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

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 takesemail 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 activitycharacteristics 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 *Structured Query Report (SQR).*

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 *basis* 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: http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k

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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