PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook: Manage Labor Relations

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Human Resources PeopleBook:
Manage Labor Relations
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Contents

General Preface
About This PeopleBook vii
PeopleSoft Application Prerequisites vii
PeopleSoft Application Fundamentals vii
Related Documentation viii
Obtaining Documentation Updates viii
Ordering Printed Documentation viii
Typographical Conventions and Visual Cues ix
Typographical Conventions ix
Visual Cues x
Comments and Suggestions xi
Common Elements in These PeopleBooks xi

Preface
PeopleSoft Human Resources Manage Labor Relations Preface xiii
PeopleSoft Application Fundamentals xiii
PeopleBook Structure xiii

Chapter 1
Getting Started With PeopleSoft Human Resources Manage Labor Relations 1
PeopleSoft Manage Labor Relations Business Processes 1
PeopleSoft Human Resources Manage Labor Relations Business Process Implementation 1
Setting Up PeopleSoft HRMS Fundamental Tables 2
Setting Up Core PeopleSoft Human Resources Manage Labor Relations Tables 2
Setting Up PeopleSoft Human Resources Manage Labor Relations Country-Specific Tables 2

Chapter 2
Understanding PeopleSoft Human Resources Manage Labor Relations 5
Prerequisites 5
PeopleSoft Human Resources Manage Labor Relations Business Processes 5
PeopleSoft Human Resources Manage Labor Relations Integrations 6
Setting Up Support Tables 6

Chapter 3
Setting Up Labor Relations Data........9
Common Elements Used in This Chapter........9
Defining Labor Agreements, Labor Agreement Categories, and Employee Classes........10
Pages Used to Define Labor Agreements, Labor Agreement Categories, and Employee Classes........10
Defining Labor Agreements........10
Defining Labor Agreement Categories........12
Setting Up Union Data........14
Pages Used to Set Up Union Data........15
Entering General Union Details........15
Entering Information on Union Contract Terms........17
Entering Additional Contract Terms........18
(CAN) (USA) Setting Up Bargaining Unit Tables for the United States and Canada........20
Pages Used to Set Up Bargaining Unit Tables........20
Enter Bargaining Unit Details........20
Setting Up Works Councils........21
Pages Used to Set Up Works Councils........22
Understanding the Works Council Business Process........22
Specifying Works Councils........23
Defining Job Changes per Regulatory Region........25
(DEU) Setting Up German Works Councils Business Process........26
Pages Used to Define German Labor Relations Codes........27
Defining Works Council Decision Groups........27
(USF) Setting Up Labor Relations Data for U.S. Federal Government Employers........29
Pages Used to Set Up Labor Relations Data........30
Setting Up General Union Details........30
Entering Bargaining Unit Address Information........31
Entering Bargaining Unit Contact Details........32
Entering Bargaining Unit Partnership and Steward Data........33
Entering Additional Bargaining Unit Contact Information........33
Entering Allowable Earnings Codes for Bargaining Unit Members........34
(USF) Creating Labor Relations Classifications........35
Pages Used to Set Up US Federal Labor Relations Management........35
Specifying Disciplinary Offenses........36
Entering Disciplinary Data for Employees........36
Specifying the First Penalty Matrix for Indicating the Offense Level Penalties........37
Defining the Recommended Disciplinary Actions for Each Offense Level and Type........37
Defining Disciplinary Actions........38

Chapter 4
Tracking Labor Relations Data.......39
Tracking Disciplinary Actions.......39
Pages Used to Track Disciplinary Actions.......40
Describing Disciplinary Incidents.......40
Documenting Disciplinary Action Details.......41
Recording Incident Resolutions.......41
Reviewing Disciplinary Action Reports.......42
Tracking Grievances.......42
Pages Used to Track Grievances.......43
Assigning Grievance IDs.......43
Entering New Grievances.......43
Tracking Steps in the Grievance Process.......45
Recording How Grievances Were Resolved.......45
Reviewing Grievances.......46

Chapter 5
Requesting Works Councils Approval.......47
Prerequisites.......47
Entering a Job Change Request.......47
Pages Used to Enter Job Change Requests.......50
Entering Job Change Request Details.......50
Approving Job Change Requests.......52

Chapter 6
(USF) Tracking Labor Relations Data.......53
(USF) Entering Union Negotiability Appeals for U.S. Federal Government Employees.......53
Page Used to Enter Union Negotiability Appeals.......53
Tracking Union Negotiability Appeals.......53
(USF) Using the Disciplinary Tracking System for U.S. Federal Government Employees.......54
Pages Used to Track Disciplinary Actions.......55
Describing Disciplinary Offenses.......55
Recording Related Disciplinary Action.......56
Entering Disciplinary Events to Support Disciplinary Actions.......57

Glossary of PeopleSoft Terms..59

Index 71

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 Manage Labor Relations Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

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

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Manage Labor Relations* 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, "Getting Started With PeopleSoft HRMS"

PeopleBook Structure

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

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

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

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

CHAPTER 1

Getting Started With PeopleSoft Human Resources Manage Labor Relations

This chapter provides an overview of the PeopleSoft Human Resources Manage Labor Relations business processes and discusses PeopleSoft Human Resources Manage Labor Relations implementation tasks.

PeopleSoft Manage Labor Relations Business Processes

The following are the PeopleSoft Human Resource Manage Labor Relations business processes:

- Managing labor union data.
- Managing works councils data.

PeopleSoft Human Resources Manage Labor Relations Business Process Implementation

The Manage Labor Relations table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Manage Labor Relations application tables.
- Additional Manage Labor Relations application tables.

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

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

Setting Up PeopleSoft HRMS Fundamental Tables

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

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*

Setting Up Core PeopleSoft Human Resources Manage Labor Relations Tables

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

Setting up these core tables prepares your system to support these business processes:

- Managing labor union data.
- Managing works councils data.

Step	Reference
1. Enter general union details.	PeopleSoft Human Resources People Book Manage Labor Relations, Setting Up Labor Relations Data, "Setting Up Union Data"
2. Enter works councils details.	PeopleSoft Human Resources People Book Manage Labor Relations, Setting Up Labor Relations Data, "Setting Up Works Councils"

Setting Up PeopleSoft Human Resources Manage Labor Relations Country-Specific Tables

The following tables outline country-specific core setup tables for the Manage Labor Relations business process. The Manage Labor Relations fundamental and core tables provide a foundation for the country-specific setup tables. The tables enable you to build a business process that accounts for local employment considerations.

The table below provides an overview of the additional steps to implement the Manage Labor Relations business process for Canada, Germany and the United States.

Step	Reference
1. (CAN/USA) Define labor union bargaining unit data.	Chapter 3, "Setting Up Labor Relations Data," Defining Works Council Decision Groups, page 27
2. (DEU) Define German Speaker Committees.	Chapter 3, "Setting Up Labor Relations Data," (DEU) Setting Up German Works Councils Business Process, page 26

Step	Reference
3. (USF) Enter labor relations data for US Federal government employers.	Chapter 3, “Setting Up Labor Relations Data,” Entering Bargaining Unit Address Information, page 31

CHAPTER 2

Understanding PeopleSoft Human Resources Manage Labor Relations

In many countries, some, or maybe all, of your employees are organized under collective labor agreements. This makes labor management a critical element of legally employing your workforce.

PeopleSoft Human Resources enables you to enter and track labor-related information for each employee. You can track disciplinary actions your organization takes against employees, as well as grievances filed by one or several people, including employees, applicants, and unions on behalf of several union members.

This chapter lists prerequisites and discusses:

- PeopleSoft Human Resources Manage Labor Relations business processes.
- PeopleSoft Human Resources Manage Labor Relations integrations.
- How to set up support tables.

See Also

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

Prerequisites

PeopleSoft Human Resources Manage Labor Relations relies on the core Human Resources setup defined in the Administer Workforce and Plan Salaries business processes.

PeopleSoft Human Resources Manage Labor Relations Business Processes

PeopleSoft Human Resources Manage Labor Relations supports the following business processes:

- Manage Union Data.

  In the Manage Labor Relations business process, you track data associated with labor unions affiliated with your organization. In addition to tracking the union information, you track employee information relating to the unions. Manage Labor Relations allows you to track union benefits, fees, enrollment, and other information regarding employees and labor unions.

In addition, organizations in Canada and the United States track specific details for bargaining units and union contacts.

- Manage Works Councils Data.

  Like tracking union data, you track works council information in the same way. Using the works council functionality you maintain information on works councils, tariffs, spokesmen committees, job change requests which require works council approval, and works council decisions. Works council approval is requested before a new job change becomes active.

PeopleSoft Human Resources Manage Labor Relations 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 Human Resources tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

PeopleSoft Human Resources: Manage Labor Relations integrates with the following PeopleSoft applications:

- All Global Payroll Country Extensions.
- PeopleSoft Time and Labor.
- PeopleSoft Benefits Administration.
- PeopleSoft HRMS Portal Solutions.
- PeopleSoft Pension Administration.

See Also

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

Setting Up Support Tables

When implementing PeopleSoft Human Resources Manage Labor Relations you will need to set up the following tables. These tables are the building blocks for your labor relations maintenance.

Table	Definition
UNION_TABLE1	Union Table — Union Location Enter general details for a Union.
UNION_TABLE2	Contract Data Enter information on union contract terms.
UNION_TABLE3	Union Earnings Distribution Enter additional contract terms, such as callback hours and allowable earnings codes.
WC_COUNCIL _TBL	Works Council Table Specify the works councils to which your employees may belong.

CHAPTER 3

Setting Up Labor Relations Data

This chapter lists common elements and discusses how to:

- Define labor agreements, labor agreement categories, and employee classes.
- Set up union data.
- Set up bargaining unit tables for the United States and Canada.
- Set up works councils.
- Set up German works councils business process.
- Set up labor relations data for U.S. federal government employers.

Common Elements Used in This Chapter

Union Contact Number The union contact number (the primary contact is number 1).

Contact Name The union or bargaining unit's contact name.

Union Steward Enter the name of the employee who serves as the liaison between your company and the union.

Life Insurance Indicate the amount of life insurance the union or bargaining unit offers for its members.

Vacation Plan Enter the vacation plan that this union offers to its members.

Sick Leave Plan Enter the sick leave plan that this union offers to its members.

Callback Minimum Hours Enter the callback minimum hours per day for which bargaining unit members get paid if they are called in to a job.

Partnership Council Select if this union is a member of a partnership council.

Partnership Council Date If this union is or will be a member of a partnership council, enter the date this event took or will take place.

Partnership Agreement Select if this union has entered into a partnership agreement.

Partnership Agreement Date If this union is or will enter into a partnership agreement, enter the date this event took place or will take place.

Days To Complete Use for establishing follow-up dates and other suspense items.

Defining Labor Agreements, Labor Agreement Categories, and Employee Classes

This section discusses how to:

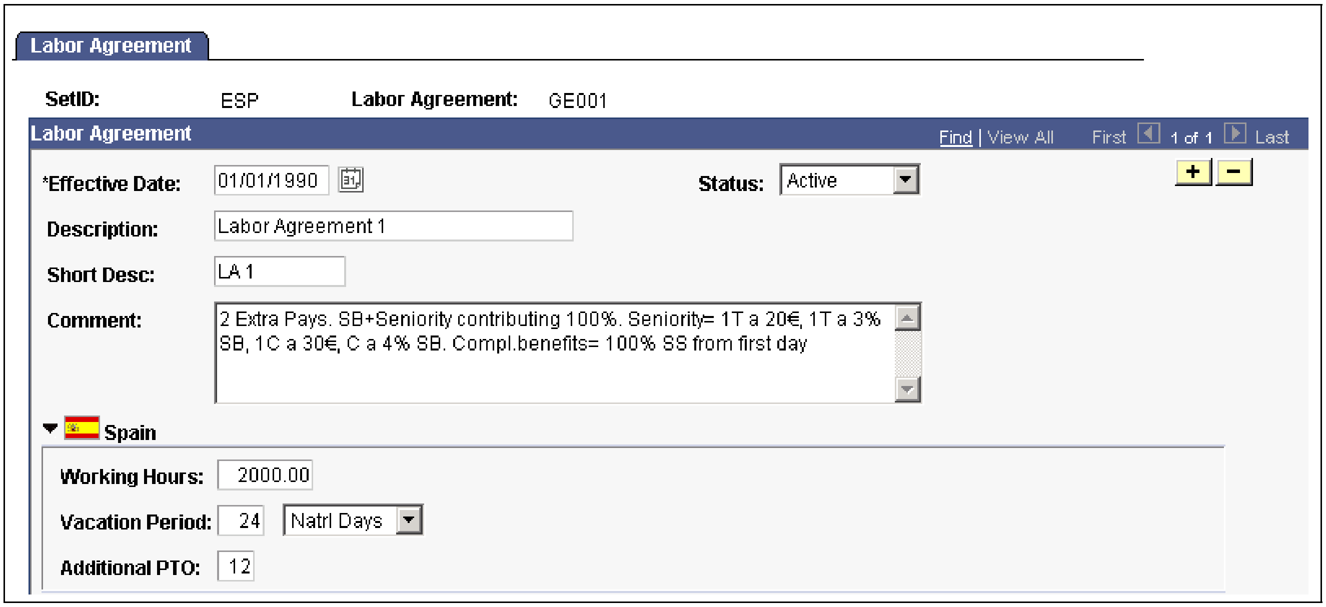
- Define labor agreements.
- Define labor agreement categories.

Pages Used to Define Labor Agreements, Labor Agreement Categories, and Employee Classes

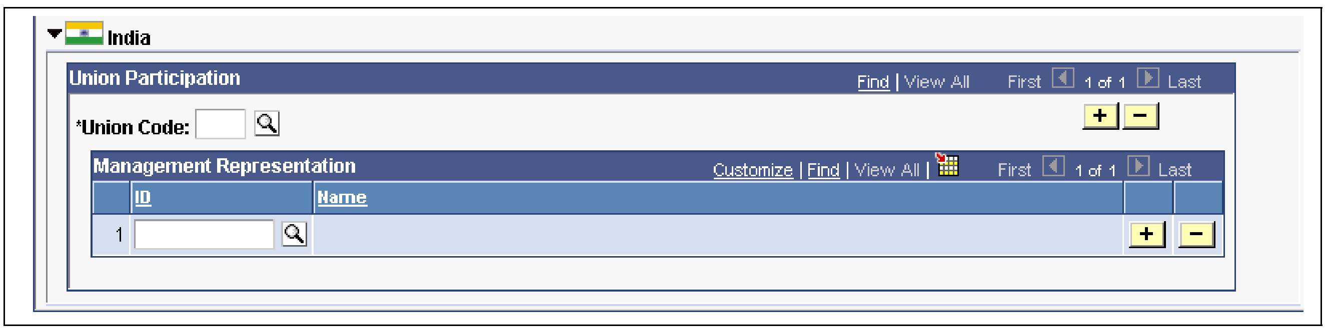
Page Name	Object Name	Navigation	Usage
Labor Agreement	EMPL_CTG	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Labor Agreement, Labor Agreement	Define labor agreements.
Labor Agreement Categories	EMPL_CTG_L1	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Employee Categorization , Labor Agreement Categories	Define categories and subcategories of employees that fall under a particular national labor agreement.
Empl Class Table (employee class table)	EMPL_CLASS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Employee Class, Empl Class Table	Add or edit employee classifications on the existing regulatory region table sets. **Note.** *(GBR)*The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification of employees. If your organization submits this report, you must use the required employee classes for the report to work correctly. The employee classes are described in the *PeopleSoft Human Resources: Meet Regulatory Requirements PeopleBook*

Defining Labor Agreements

Access the Labor Agreement page.



Labor Agreement page (1 of 2)



Labor Agreement page (2 of 2)

(ESP) Spain

Working Hours

Enter the annual number of working hours as agreed upon by the labor agreement.

Vacation Period

Define the vacation period as agreed upon by the labor agreement. You have the option of defining the vacation period in *Months, Natrl Days* (natural days), *Weeks,* or *Work Days.*

Natural days are like calendar days. They include weekends and holidays.

Work days are like regular working days. They do not include weekends and holidays. For example, let's say that an employee's regular work days are Monday through Friday, and the employee is entitled to 23 work days of vacation, as defined in the employee's labor agreement. The employee can take a vacation from July 1 to July 31, using 23 work days. This is calculated as 4 weeks x 5 work days plus 3 more work days.

Additional PTO (additional paid time off)

Enter the amount of additional PTO *(dias moscosos),* if it applies to the labor agreement. Depending on the conditions of the labor agreement, an employee may or may not carry an additional PTO balance from one year to the next. Sometimes, if an employee does not use additional PTO within the current year, the employee will lose those days. Other times, it is possible to carry additional PTO balances to the next year.

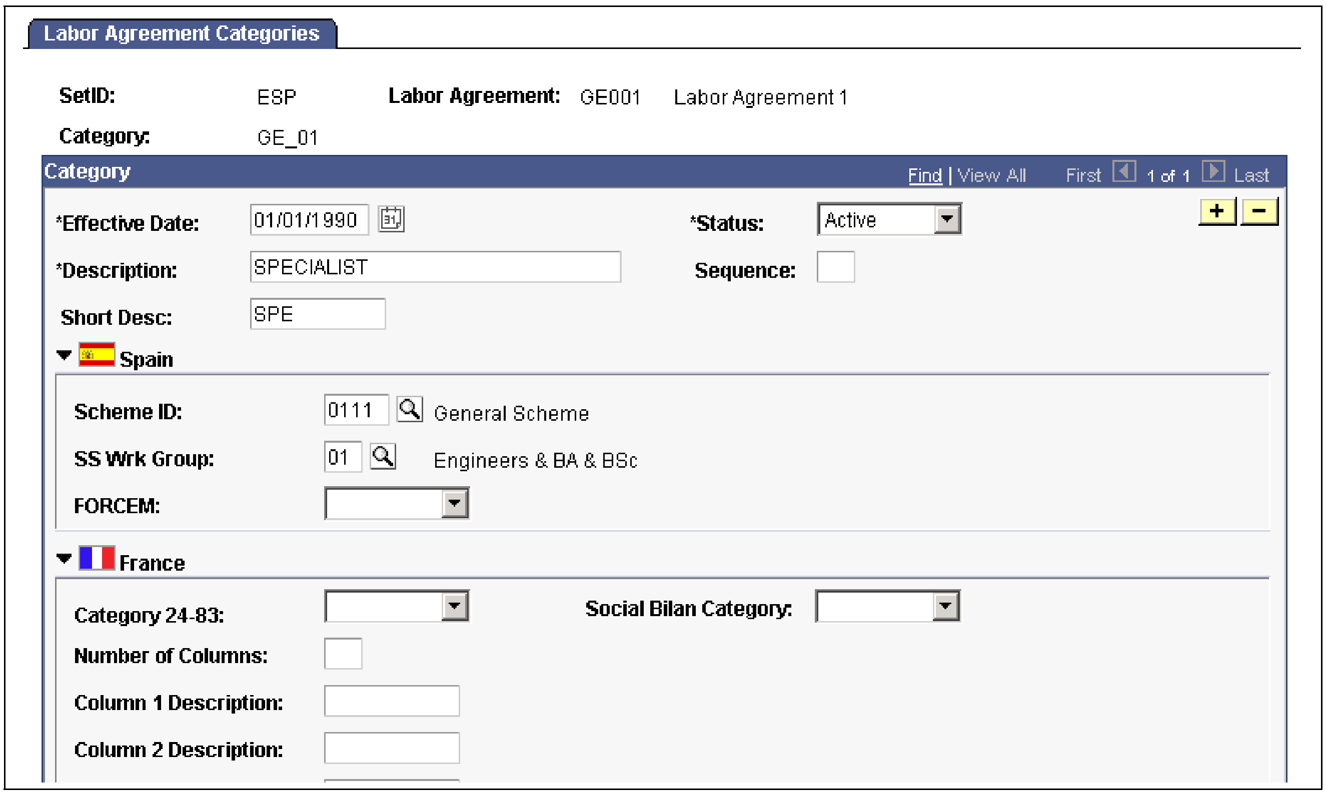
(IND) India

Union Code Select the appropriate Union Code. This is defined in the Unions component.

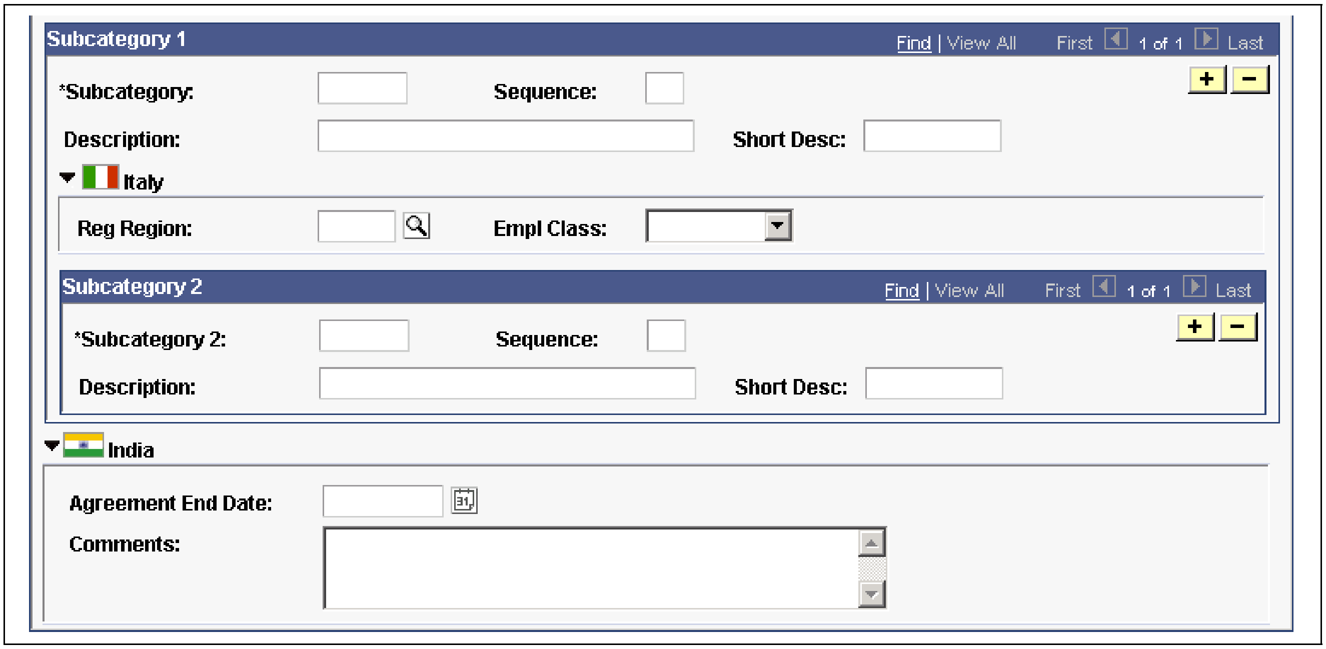
Management Representation ID Enter the employee ID of the management representative to the union. This field should not be left empty if a Union Code is entered.

Defining Labor Agreement Categories

Access the Labor Agreement Categories page.



Labor Agreement Categories page (1 or 2)



Labor Agreement Categories page (2 of 2)

Category

Enter the category name. Each labor agreement has its own categories, subcategories, and naming conventions. For example, the French Collective Labor Agreement *KFO1* (which is for *Civil Engineering)* classifies employees in three categories: *CAD* (for *Executive), ETAM* (for *Manager),* and *OUV* (for *Workman)*. In Germany, use categories, such as *Blue Collar Worker* or *White Collar Worker.*

Note. When you set up new employee categories, remember that PeopleSoft Human Resources reserves categories starting with zero for use as system data.

Sequence

Use to number the categories in the order the system should process them.

(ESP) Spain

Scheme ID

Enter the social security scheme ID to tie employee categories with social security.

Note. You must enter a scheme ID before selecting the social security work group.

SS Wrk Group (social security work group)

Every Spanish employee must belong to a work group defined by the Spanish government. Select a group from available options.

FORCEM (Fundacion para la Formacion Continua)

The Spanish government requires employers to report on their employees' FORCEM (Fundacion para la Formacion Continua) categories. Values are:

- *None*
- *Executive*
- *Manager*

- *No Qualifi* (No Qualified Worker)
- *Office Wor* (Office Worker)
- *Qualified* (Qualified Worker)

(FRA) France

Category 24-83 Select the applicable code to link an employee category to a regulatory 2483 category. The Category 24-83 code is used for the 2483 Training Report.

Social Bilan Category Select the applicable code to link an employee category to a regulatory Employee Survey category. The code is also used for the 2483 Training Report.

Number of Columns Specify how the category is organized. When you enter a number of columns, the system dynamically changes the number of description fields that appear on the page when you move out of this field. For example, if you enter *2* in this field, the system adapts the number of description fields accordingly. In the example above, category *CAD* is organized with three column description criteria: *Number, Grade,* and *Step.*

Subcategory 1

Subcategory and Subcategory 2 Identify employee subcategories, such as *Technical Trainees* or *Day Laborers*. See the field description for the Category field for instructions on completing these fields.

(IND) India

Agreement End Date Enter the end date of the labor agreement. Agreement End Date should always be greater than the labor agreement effective date.

Comments Enter comments about the labor agreement. This might be a description of the labor agreement details.

Setting Up Union Data

If you're administering a workforce, you or others in your company might need information on union employees for collective bargaining agreement negotiations, grievance tracking, or salary step increases. Use the Union Table component to define codes for unions to which company employees belong.

In this section, we discuss how to:

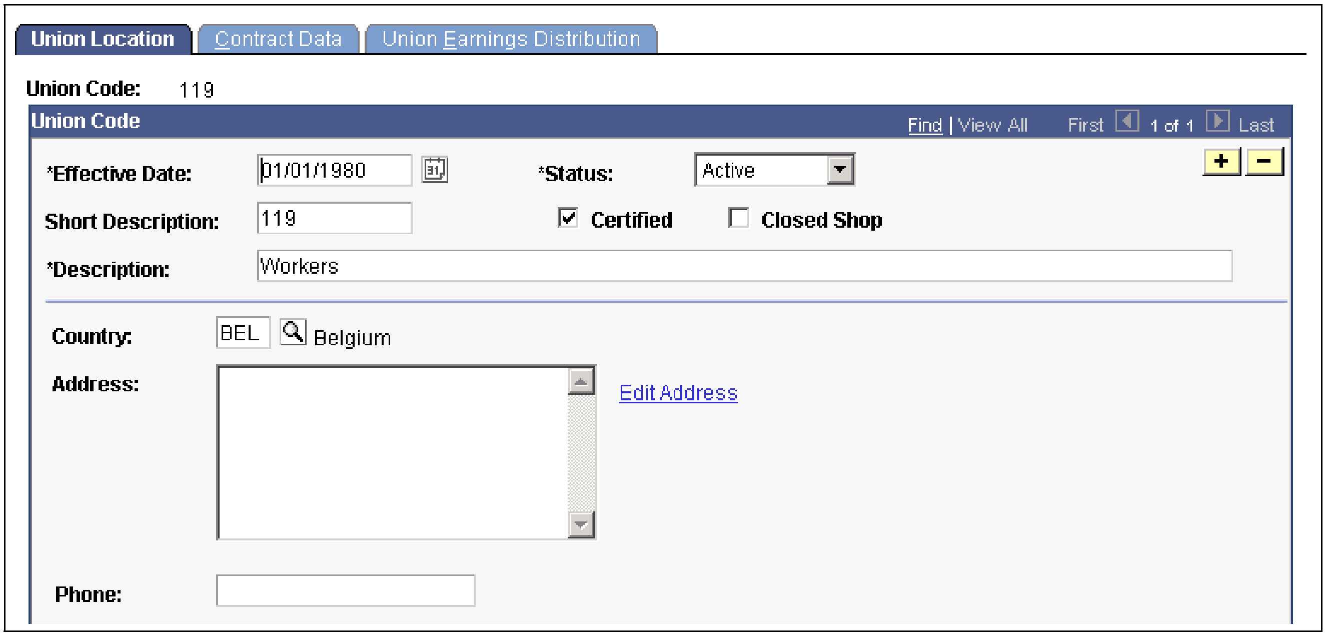
- Enter general union details.
- Enter information on union contract terms.
- Enter additional contract terms.

Pages Used to Set Up Union Data

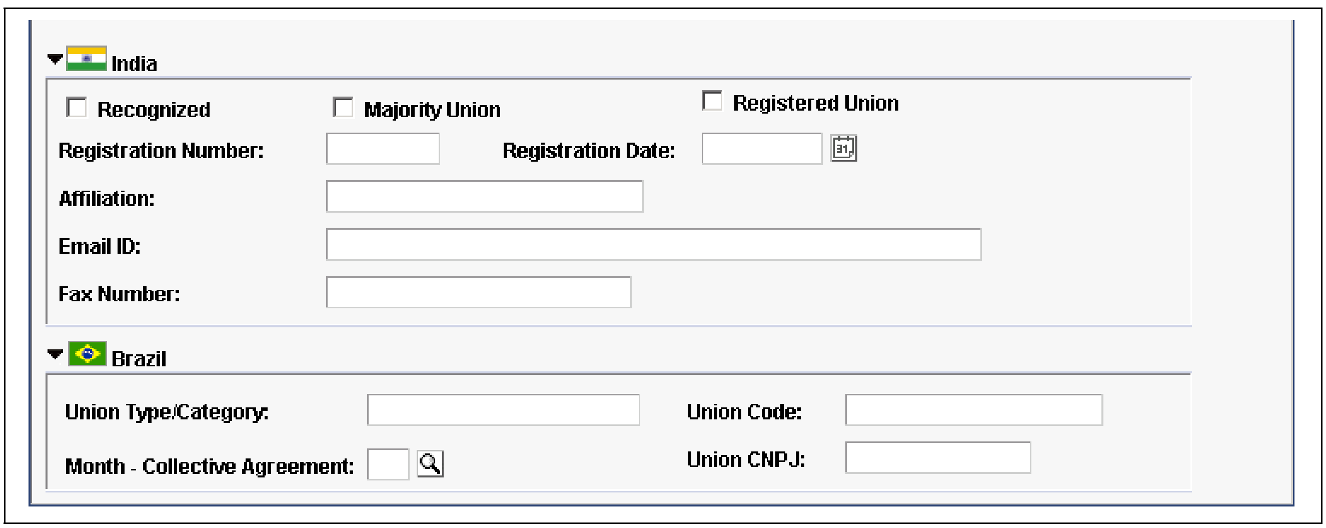
Page Name	Object Name	Navigation	Usage
Union Location	UNION_TABLE1	Set Up HRMS, Common Definitions, Contracts/Unions, Unions, Union Location	Enter general details for a union.
Contract Data	UNION_TABLE2	Set Up HRMS, Common Definitions, Contracts/Unions, Unions, Contract Data	Enter information on union contract terms.
Union Earnings Distribution	UNION_TABLE3	Set Up HRMS, Common Definitions, Contracts/Unions, Unions, Union Earnings Distribution	Enter additional contract terms, such as callback hours and allowable earnings codes.
Disciplinary Type Table	DISCIP_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Disciplinary Type	Identify the various types of violations that may require managers to impose disciplinary actions on employees.
Disciplinary Step Table	DISCIP_STEP_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Disciplinary Step Table	Define the steps managers can take during the disciplinary action process.
Resolution Type	RESLTN_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Resolution Types	Define the types of resolutions applicable to the disciplinary process.
Grievance Type Table	GRIEV_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Grievance Type Table	Classify the different kinds of grievances that employees, applicants, or unions might file.
Grievance Step Table	GRIEV_STEP_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Grievance Step Table	Delineate the standard course of steps managers can take to resolve grievances.

Entering General Union Details

Access the Union Location page.



Union Location page (1 of 2)



Union Location page (2 of 2)

Certified Select if the union is certified. Certification means that a labor relations board in the country in question formally recognizes the union as the bargaining unit's exclusive representative. Certification typically occurs after the union wins a vote to form a union. A labor relations board's involvement in certifying the union ensures that all the appropriate laws and regulations have been followed in forming the union.

Closed Shop Select if the union is a closed shop. This usually means that individuals can't work for a company within the represented worker class unless they agree to pay the equivalent dues to the union.

(IND) India

Recognized Select if the union is a Recognized Union.

Majority Union	Select if the majority of workers are members of the union.
Registered Union	Select if the union is a trade union registered with the government. If this is selected, then you have to enter data in the Registration Number and Registration Date fields.
Registration Number	Enter the registration number.
Registration Date	Enter the registration date.
Affiliation	Enter the affiliation.
Email ID	Enter the email ID.
Fax Number	Enter the fax number.

(BRA) Brazil

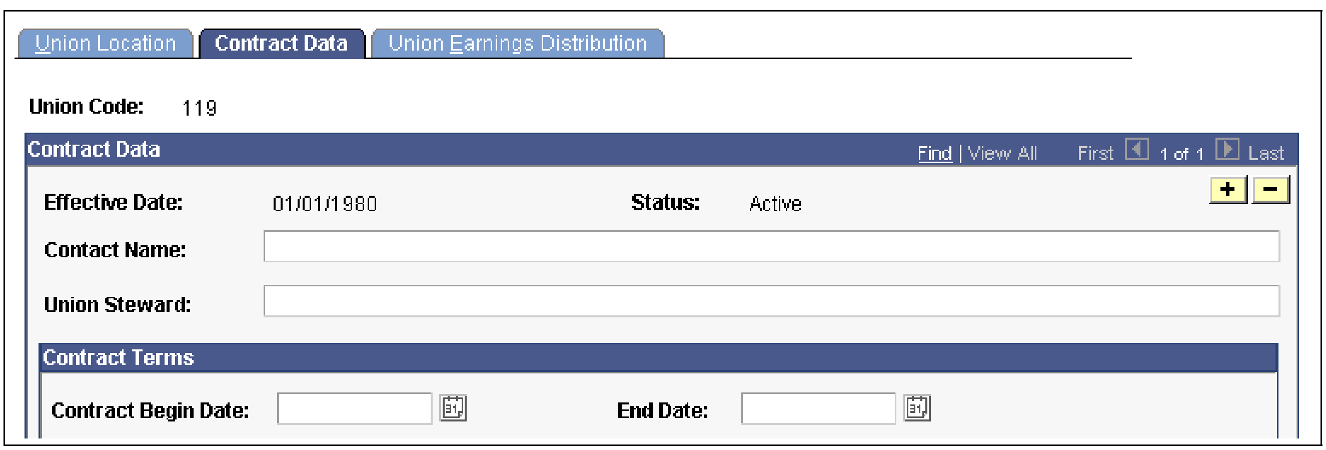
Union Type/Category	Enter a category, such as Trade employee or Chemical sector employee. This information is used to group unions for reporting purposes.
Union Code	Enter the code that identifies the union in Brazil.
Month - Collective Agreement	Enter the base month of the union category. This month is when you review employees and adjust salaries.
Union CNPJ	Enter the union's CNPJ (Cadastro Nacional de Pessoa Jurídica) ID code.

See Also

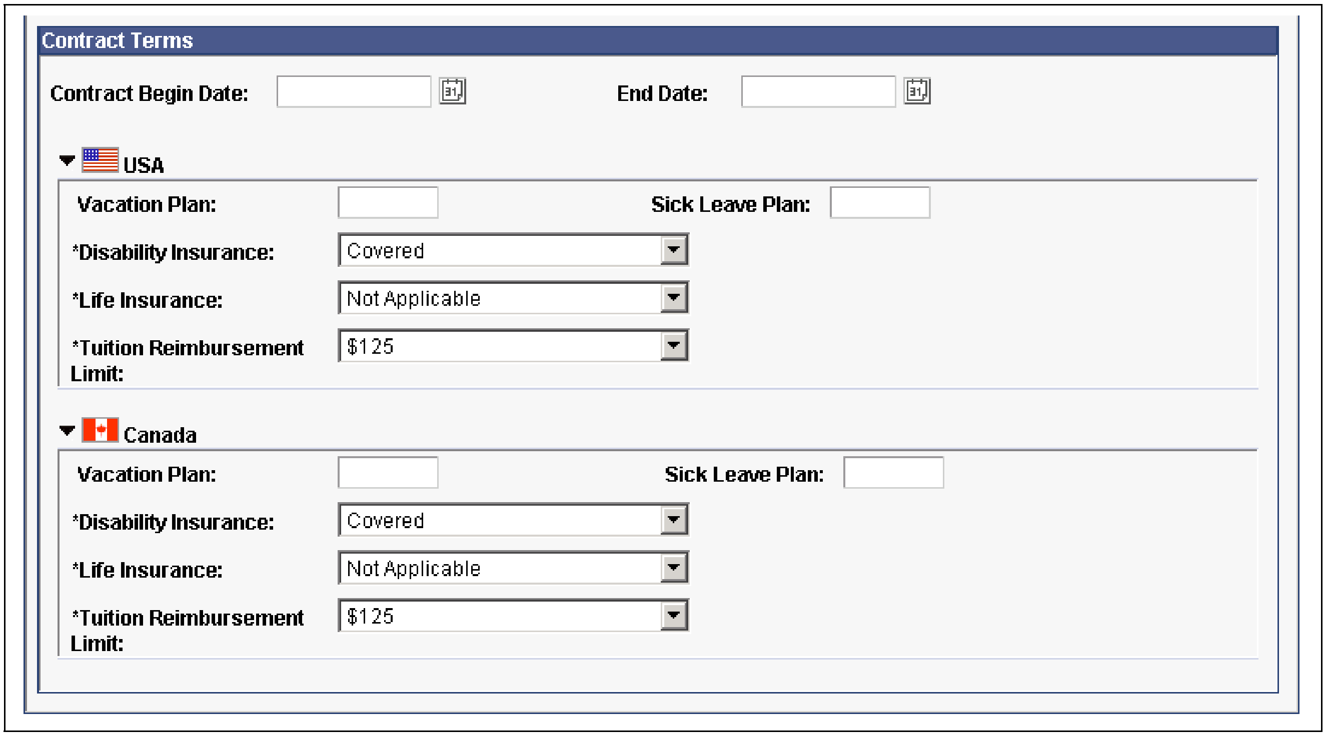
PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Installing PeopleSoft HRMS," Administering Country Codes

Entering Information on Union Contract Terms

Access the Union Table - Contract Data page.



Contract Data page (1 of 2)



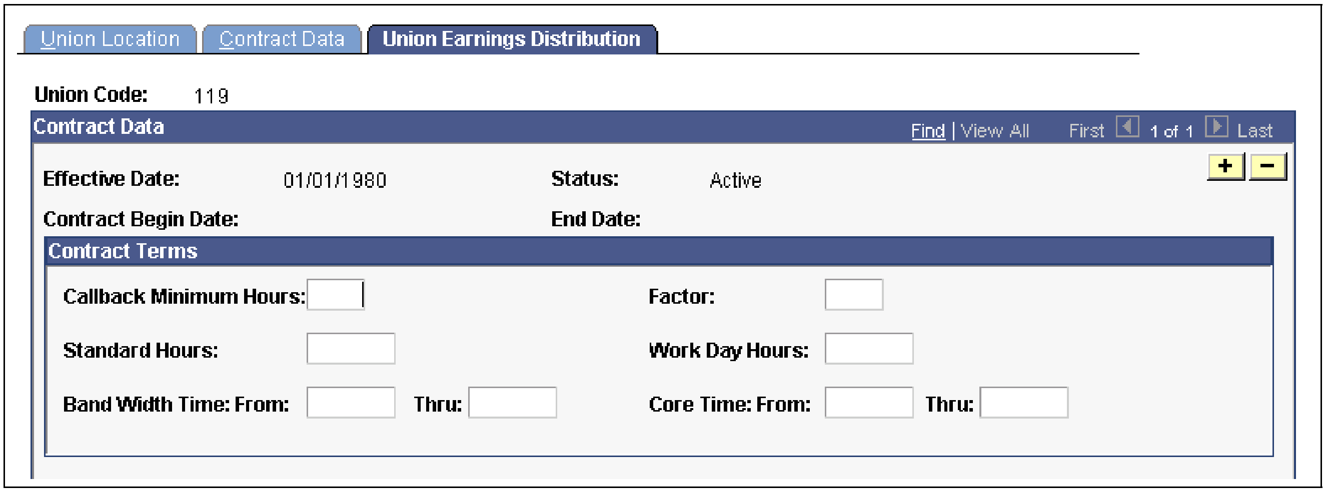
Union Table - Contract Data page (2 of 2)

USA/CAN

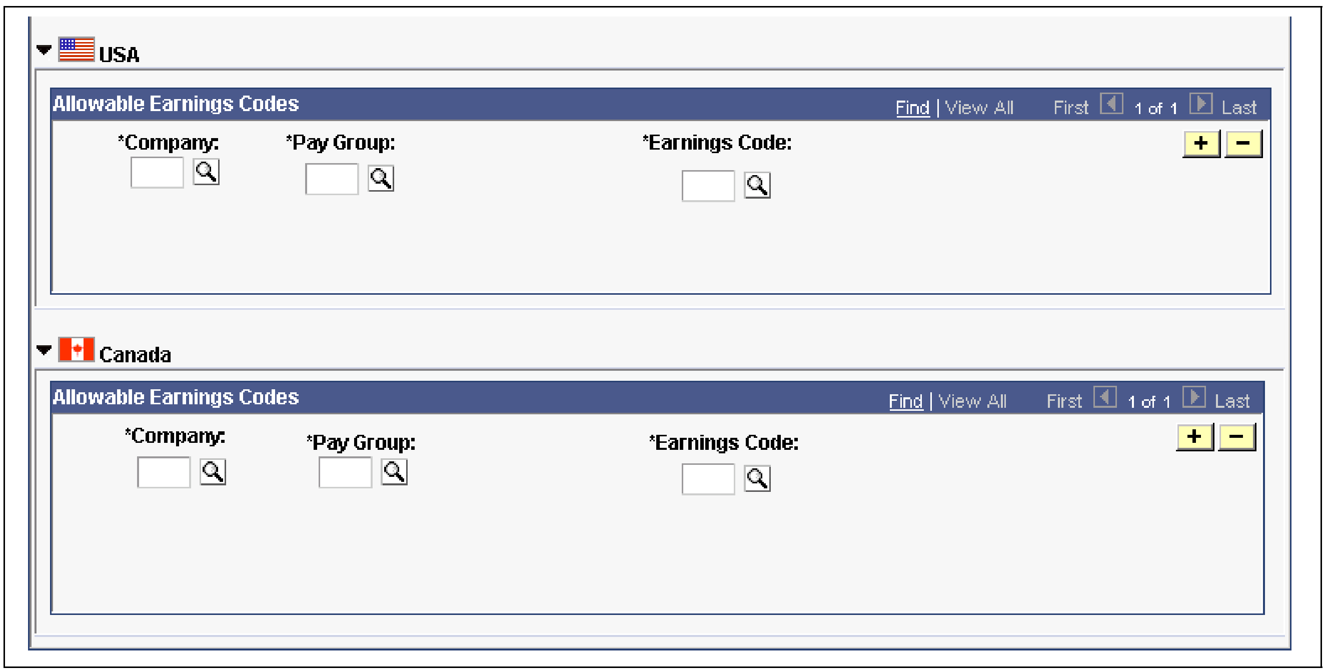
Vacation Plan	Enter the code for the type of vacation plan administered.
Sick Leave Plan	Enter the code for the type of sick leave administered.
Contract Begin Date and **End Date**	Enter the dates that the contract begins and ends.
Disability Insurance	Indicate whether the union provides disability insurance for its members.
Life Insurance	Indicate whether the union provides life insurance.
Tuition Reimbursement Limit	Indicate whether the union provides tuition reimbursement and at what limit.

Entering Additional Contract Terms

Access the Union Earnings Distribution page.



Union Earnings Distribution page (1 of 2)



Union Earnings Distribution page (2 of 2)

Contract Terms

Factor

Enter the rate at which union employees should be paid if they are called into a job. For example, if the employee should receive the regular rate, enter *1.* If the employee should receive 1.5 times the regular rate, then enter *1.5.*

USA/CAN Allowable Earnings Codes

Earnings Code

Enter the earnings code for this union. For example, at *CCB,* union employees who are paid *semimonthly* can receive *overtime, regular,* and *sick pay.*

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Organization Foundation Tables," Defining Establishments

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Employee Job Information

(CAN) (USA) Setting Up Bargaining Unit Tables for the United States and Canada

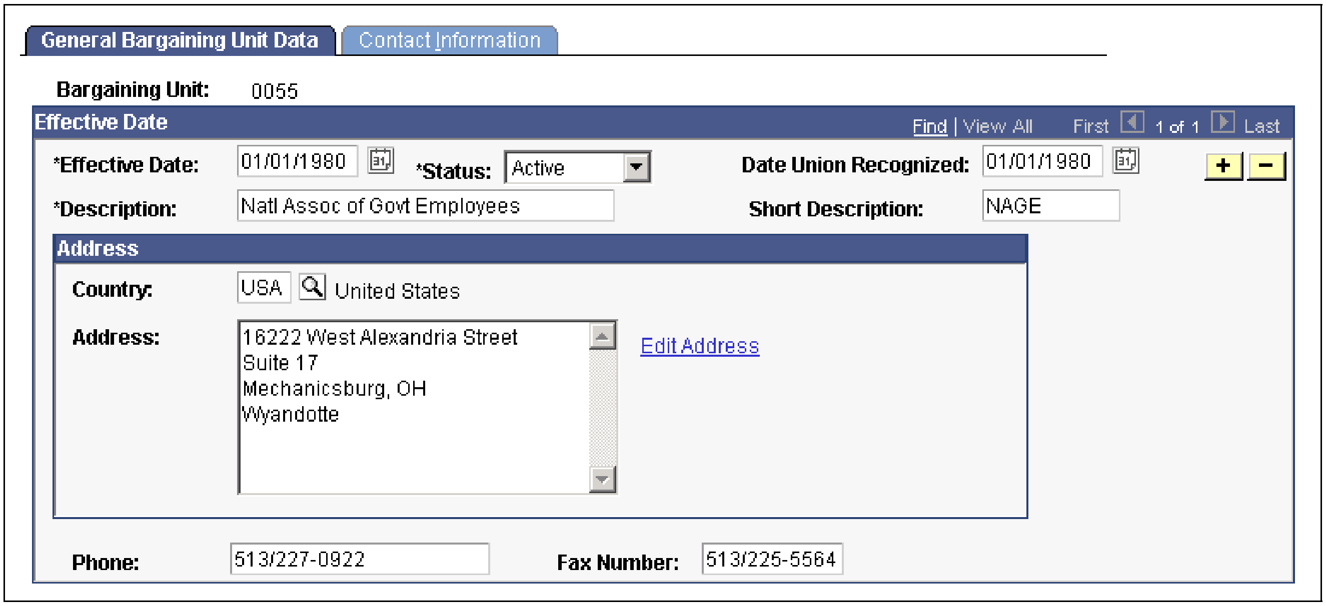
In the Bargaining Unit Tables component, record general bargaining unit details and contact information.

Pages Used to Set Up Bargaining Unit Tables

Page Name	Object Name	Navigation	Usage
General Bargaining Unit Data	GVT_BARG_UNIT1	Set Up HRMS, Common Definitions, Contracts/Unions, Bargaining Unit, General Bargaining Unit Data	Enter bargaining unit details.
Contact Information	GVT_BARG_UNIT2	Set Up HRMS, Common Definitions, Contracts/Unions, Bargaining Unit, Contact Information	Enter union contact information.

Enter Bargaining Unit Details

Access the Bargaining Unit Data page.



General Bargaining Unit Data page

Date Union Recognized Enter the date the union was recognized by your agency.

Setting Up Works Councils

The works councils for your company are internal committees elected by the non-management employees to represent their interests. If your organization does business in countries where workers can belong to works councils, every work location in your company may have a local works council. The company as a whole may have a central works council. The works council's duties may include:

- Watching the implementation of collective bargaining agreements.
- Promoting integration of minorities, young, older, and handicapped employees.
- Monitoring fair compensation and working hours.
- Providing codetermination concerning layoffs, short-time work, and other labor issues.

If your organization does business in countries where workers can belong to works councils, define the works councils that your employees can join.

Pages Used to Set Up Works Councils

Page Name	Object Name	Navigation	Usage
Works Council Table	WC_COUNCIL_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Works Council, Works Council Table	Specify the works councils to which your employees may belong.
Job Change by Reg Region	WC_ACTN_REASON_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Job Change by Reg Region, Job Change by Reg Region	Define Job Change actions and reasons per regulatory region. This is the main setup page for configuring works council transactions for job changes that require works council approval.

Understanding the Works Council Business Process

This section discusses how to set up the Works Council business process.

To set up and run the Works Council business process:

1. Set up codes and values on the Job Change by Reg Region page.
2. Maintain job labor data.

   Use the Job Data - Job Labor page to describe, for each of your employees, a labor category and the type of role this category plays in the company.
3. Request Job Change.
4. Review works council's decisions.

   The personnel administrator uses the Review my Job Change Requests page to review the works council's decision and chooses to accept or override the works council's decision. If the personnel administrator overrides the works council decision, the works council is notified with an email and worklist.
5. Review and approve or deny employee job actions.

   The processing for the works council review and approval is automated. The works council member reviews the job change request, uses the Job Change Request pages to look at the information about the employee and the action, and enters a response (or decision). Once a decision is entered, the personnel administrator (human resources manager) is notified with an email and worklist.
6. Load changes to job data.

Managers can only enter job change requests using the self service pages as delivered with PeopleSoft Human Resources eProfile. The request as part of Manage Labor Relations can only be entered by the HR Administrator. The following table discusses the delivered processes by role and product.

Hire Process

Product	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	Manager	Works Council

Termination Process

Product	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	Manager	Works Council

Transfer Process

Product	Requested by	Approved by
Human Resources	HR Administrator	Works Council
eProfile	New Manager	Manager, Works Council

See Also

Chapter 3, "Setting Up Labor Relations Data," Defining Labor Agreements, Labor Agreement Categories, and Employee Classes, page 10

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process," Defining Duty Types and Reasons for Personnel Actions

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Employee Job Information

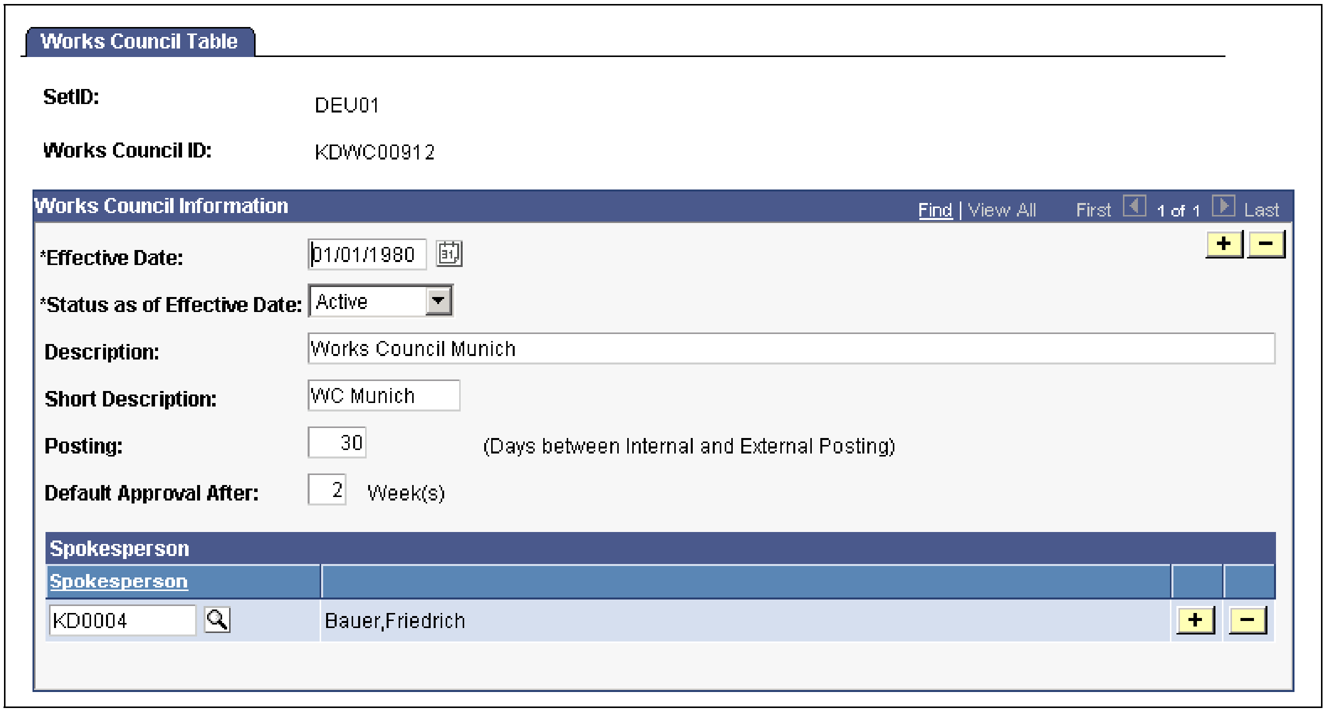
PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Employee Job Information

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information," Personnel Actions and Employee Status

PeopleSoft 8.8 eProfile Manager Desktop PeopleBook, "Understanding PeopleSoft eProfile Manager Desktop"

Specifying Works Councils

Access the Works Council Table page.



Works Council Table page

Works Council ID The ID you entered to access this page. This is the ID you'll define.

Posting Enter the number of days between internal and external posting.

Default Approval After The Default Approval After date will automatically approve works council relevant job change requests if the works council doesn't react by the date specified. Any employee Job Change approval requests that have not been approved or denied after the specified date will automatically set to *Approved by Works Council* via an automatic update process and will trigger all workflow associated with Works Council approval.

Spokesperson Select the ID for the person (or persons) to whom you want to route works council approvals. Any job change request that has been configured for works council approval in the job change by reg region page can be assigned. The spokesperson(s) will receive any works council hire approval requests for job requisitions that have a works council ID. Enter as many spokesperson IDs as needed.

Linking Works Councils to the Location Table

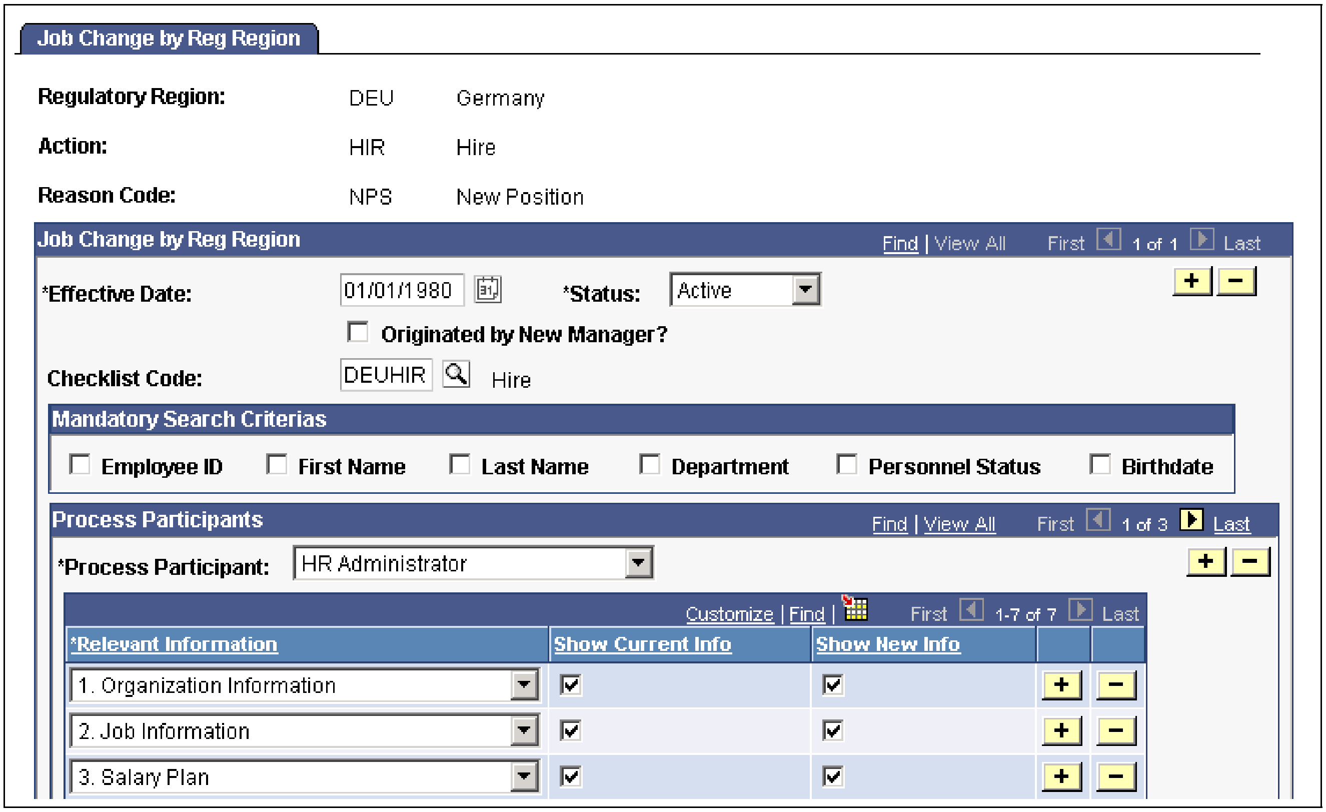
The company location table is a global setup table used to display the appropriate works council ID to Job Data to route all works council relevant job change requests to the appropriate works council spokesperson. During approval processing for Job Actions which require works council approval, the system will first check which works council ID is relevant for the employee's company and location and then check the Works Council setup table to see which spokesperson(s) should be notified. There are two German specific fields: Spokesmen Committee ID and Social Insurance Unit. The Works Council ID will appear as a display-only field in Job Data on the Job Labor page (from Company Location table). The value will then be saved to the Company Location table.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Organization Foundation Tables,” Establishing Locations

Defining Job Changes per Regulatory Region

Access the Job Change by Reg Region page.



Job Change by Reg Region page

The Job Change by Reg Region page identifies which combination or regulatory region, action, and action reason may be selected from the Request Job Change - Works Council page. All of the setup information required for a Works Council relevant job change request may be defined here, including which page areas are relevant for which roles, whether a given role may also view current information, and so on. Define which job changes require works council approval before they take place, by regulatory region, action, and action reason.

Note. If you are processing an employee transfer request, you can define whether the current or new manager requests the job change.

Checklist Code	Select a Checklist Code. The Checklist Code refers to a checklist that consists of all to-do items maintained for a single employee or applicant with the specified status and date. You can associate the checklist with a job change here. During the business process the HR person can generate the relevant checklist from the job change request page.
Process Participant	Select a Process Participant from the drop down list. Select *Current Manager, HR Administrator, New Manager, or Works Council.*

(DEU) Setting Up German Works Councils Business Process

In addition to the core functionality setup tables, if you're administering a German workforce, you can use several German setup tables to define codes for labor relations matters that affect your company, such as tariff areas and spokesmen committees.

Rules defining employee labor relations for your German workforce are negotiated between the trade unions and the employers' associations. Additional rules are defined between the employees and their employers through two groups of elected representatives. The works councils represent non-management employees. The spokesmen committee represents management employees. Although the works councils and spokesmen committees are groups of people elected to represent the interests of employees, they aren't union representation.

Use the codes and information that you set up in these tables to track information about decisions made by the works councils at your operating locations.

Tariff Areas

A tariff is a contract between the employees' unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as banking or metal). Tariffs are already in the system.

Additional labor agreement terms, such as salary plans or employee reviews, can also be applied based upon the tariff area. Region or location (such as Bavaria or Berlin) often define the tariff area.

Spokesperson Committee

The spokesmen committee (*sprecherausschusse*) represents the interest of the management personnel in your company before the ownership or executive management. The spokesmen committee mainly consults; however, it also helps determine individual employment contracts, hirings, and dismissals. The committee also helps monitor employment fairness, equity, and nondiscrimination in terms of nationality, race, religion, sex, and age.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Processing Applicants," Entering Works Council Decision Data

Chapter 3, "Setting Up Labor Relations Data," Setting Up Works Councils, page 21

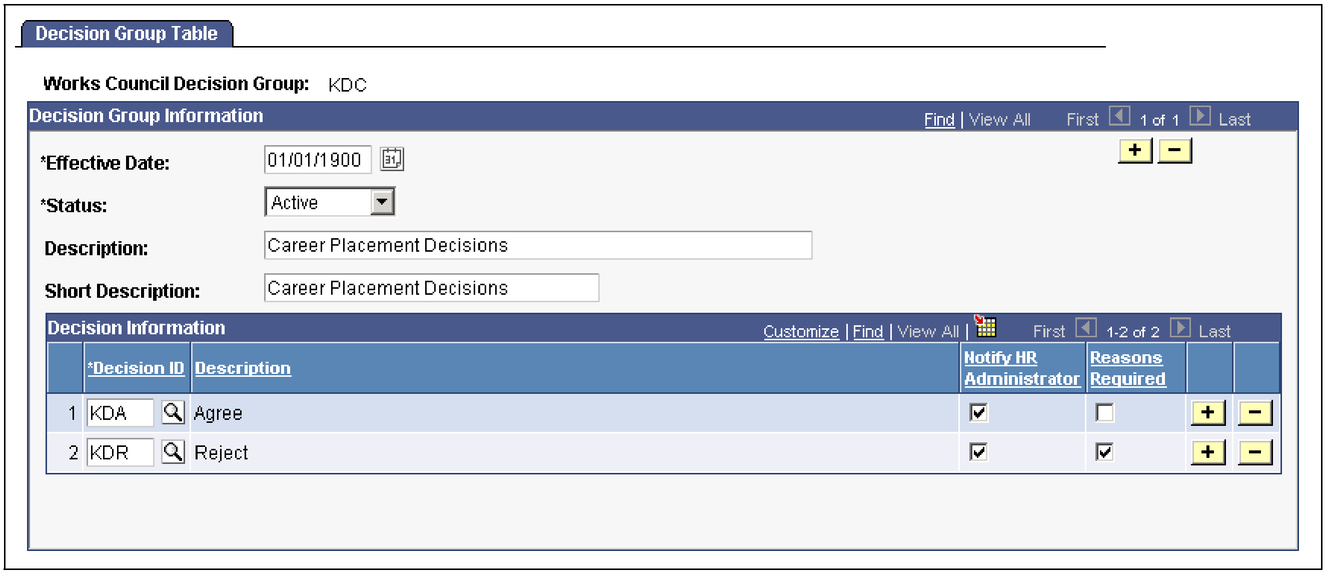
PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Creating and Posting Job Requisitions," Entering Basic Job Information

Pages Used to Define German Labor Relations Codes

Page Name	Object Name	Navigation	Usage
Tariff Area Ger (German tariff area)	TARIFF_AREA_GER	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Tariff Area, Tariff Area Ger	Enter tariff areas for later use on the Job Labor - Germany page. In PeopleSoft Human Resources, the tariff areas for the metal tariff are included as system data.
Spokesmen Comm (spokesmen committee)	SPK_COMM_GER	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Speaker Committee DEU, Spokesmen Comm.	Describe the spokesmen committee for your work locations.
Decision Table	DECN_TBL_GER	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Works Council Decision, Decision Table	Enter works council decision types. You must have previously defined Works Council Decision codes.
Decision Group Table	WC_DECISIONGRP_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Works Council Decision Group, Decision Group Table Page	Enter works council decision groups. This table ties works council decision types to a decision group (such as *Pay Action*). You must first have entered works council decisions into the system. Multiple works council decision groups can use the works council decisions.

Defining Works Council Decision Groups

Access the Decision Group Table page.



Decision Group Table page

Decision ID When you move through the field, the Description and Short Description appear.

Notify HR Manager Select this check box if the human resources manager needs to be notified, or if reasons are required to explain the decision.

When this check box is selected, a workflow process notifies the personnel administrator role (human resources manager) when a works council decision is entered on the Works Council Decisions page.

Reasons Required Select this check box if reasons are required to explain the decision.

When this check box is selected, you must also complete the Comments field.

Note. Link works council decision groups with action reasons using the Action Reason Data page. Then when a personnel action is entered into Job Data for a German Employee having the *DEU* regulatory region, the works council can give only the predetermined answers (decisions) defined for the decision group on this page.

Note. The Decision Group Table page is used in PeopleSoft Human Resources Recruit Workforce as part of the pre-hire process. This page is *not* used for a new job change request.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information," Personnel Actions and Employee Status

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Setting Up Recruit Workforce"

(USF) Setting Up Labor Relations Data for U.S. Federal Government Employers

Use the Union Table to define codes and record data for unions to which agency employees belong. You or others in your agency might need information on union employees for collective bargaining agreement negotiations, grievance tracking, or pay step increases.

In this section, we discuss how to:

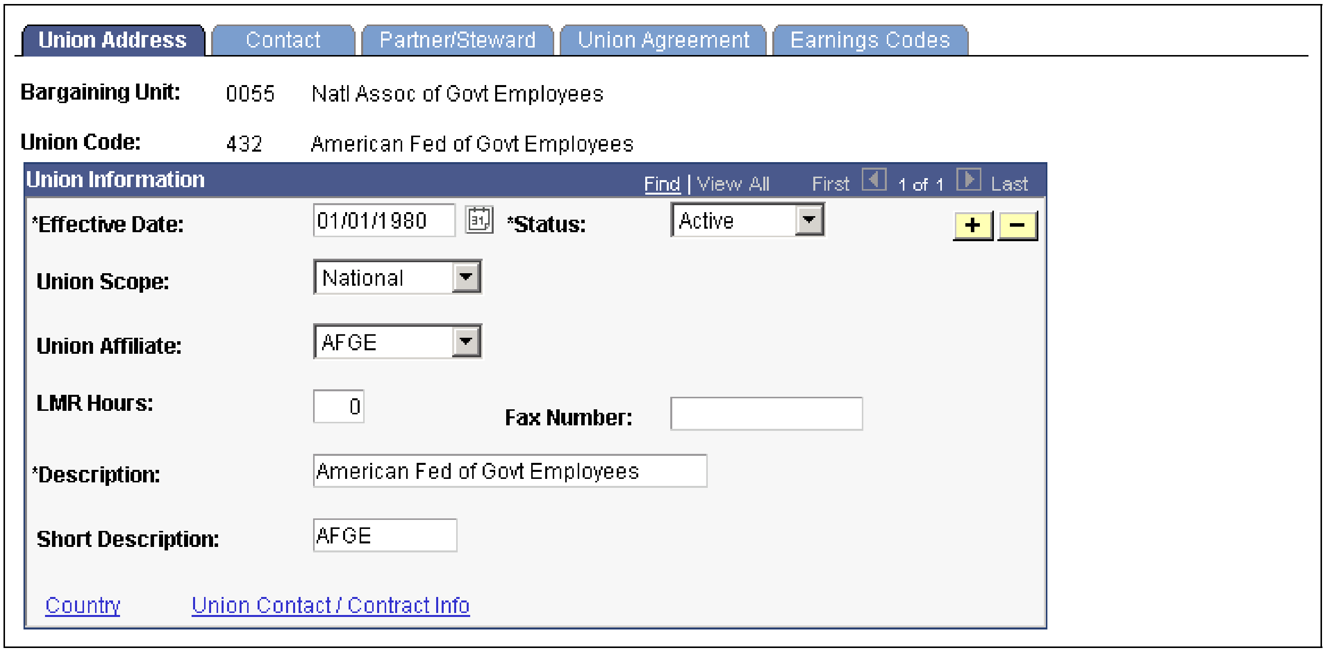
- Set up general union details.
- Enter bargaining unit address information.
- Enter bargaining unit contact details.
- Enter bargaining unit partnership and steward data.
- Enter additional bargaining unit contact information.
- Enter allowable earnings codes for bargaining unit members.

Pages Used to Set Up Labor Relations Data

Page Name	Object Name	Navigation	Usage
Union Address	GVT_BU_UNION_TBL1	Set Up HRMS, Common Definitions, Contracts/Unions,Unions USF, Union Address	Enter general details and address information for a union.
Union Address Information	GVT_BU_UNION_SEC1	Set Up HRMS, Common Definitions, Contracts/Unions, Unions USF,Union Address, click the Country link to access the Union Address Information	Enter the address information for this bargaining unit.
Contact and Contract Info	GVT_BU_UNION_SEC2	Set Up HRMS, Common Definitions, Contracts/Unions, Unions USF, Union Address, click the Union Contact/ Contract Info link to access the Contact and Contract Info page	Enter contact and contract details for this bargaining unit.
Contact	GVT_BU_UNION_TBL2	Set Up HRMS, Common Definitions, Contracts/Unions, Unions USF, Contact	Enter additional union contact information.
Partner/Steward	GVT_BU_UNION_TBL3	Set Up HRMS, Common Definitions, Contracts/Unions, Unions USF, Partner/Steward	Enter partnership and steward data for this bargaining unit.
Union Agreement	GVT_BU_UNION_TBL4	Set Up HRMS, Common Definitions, Contracts/Unions, Unions USF, Union Agreement	Enter additional contract terms for this bargaining unit.
Earnings Codes	GVT_BU_UNION_TBL5	Set Up HRMS, Common Definitions, Contracts/Unions, Unions USF, Earnings Codes	Enter allowable earnings codes data for bargaining unit members.

Setting Up General Union Details

Access the Union Address page.



Union Address page

Union Scope Enter the union scope (local, national, worldwide).

Union Affiliate Enter the union affiliate type.

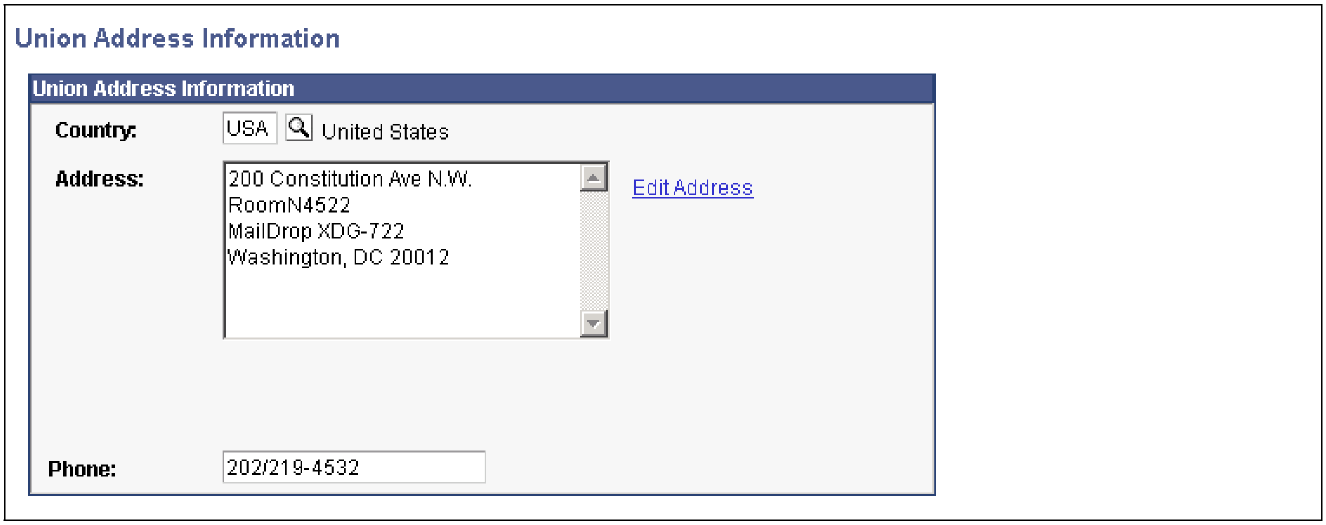
LMR Hours (labor management relations hours) Enter the labor management relations training hours required for union members or other personnel, if you want to track this information.

Country To enter the bargaining unit's address information, click this link. The Union Address Information page appears.

Union Contact/Contract Info To enter the bargaining unit's contact and contract information, click this link. The Contact and Contract Info page appears.

Entering Bargaining Unit Address Information

Access the Union Address Information page.

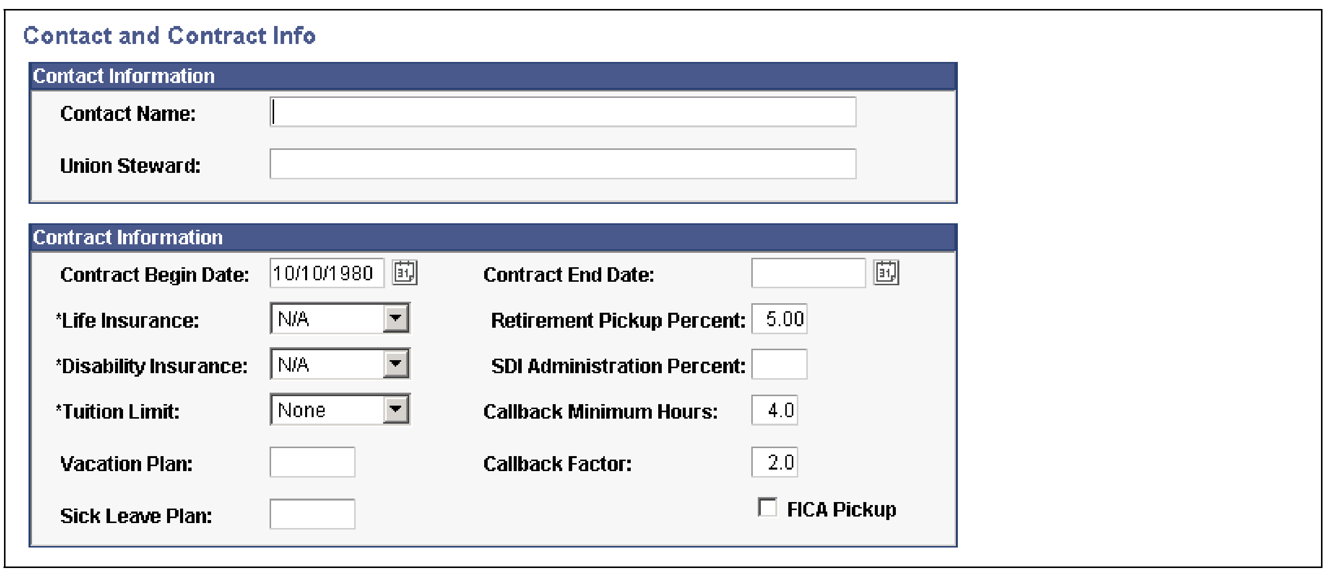


Union Address Information page

Country The fields on this address group box dynamically reformat based on the country you select in the Country field.

Entering Bargaining Unit Contact Details

Access the Contact and Contract Info page.



Contact and Contract Info page

Contract Terms

Disability Insurance Specify the amount the disability insurance offered bargaining unit members.

Retirement Pickup Percent Enter the retirement pickup percent for bargaining unit members' retirement plan under the contract.

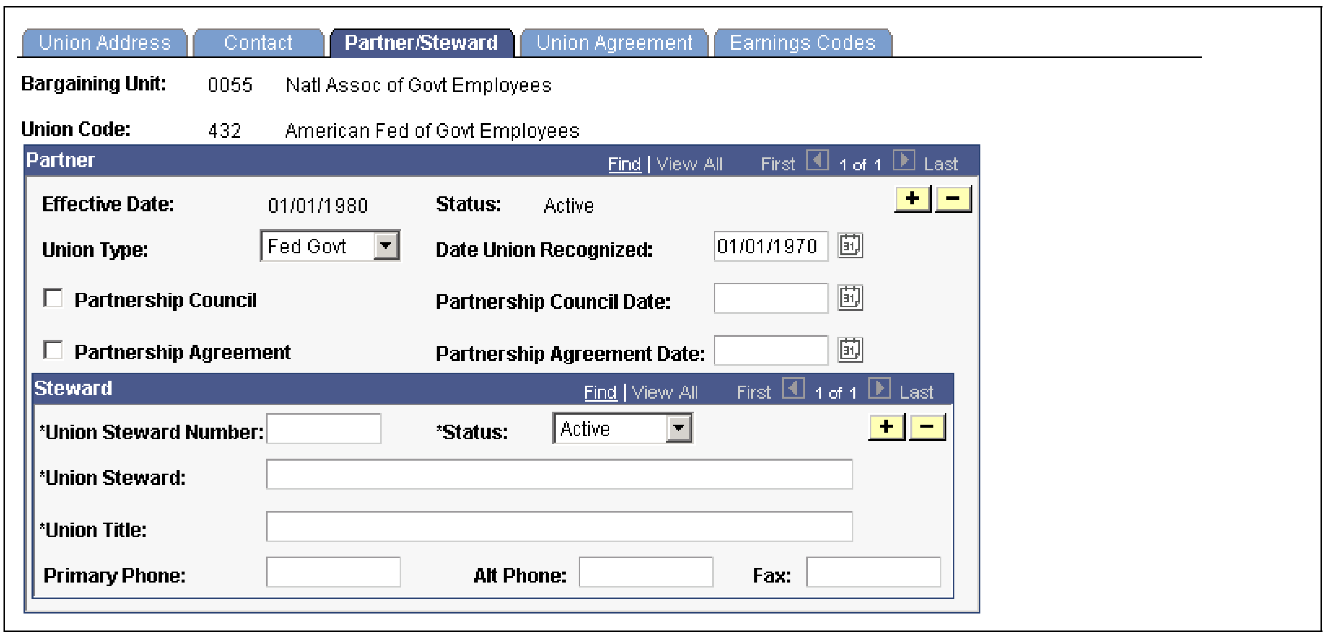
Tuition Limit Indicate the maximum amount of tuition provided each bargaining unit member, if any.

SDI Administration Percent (state disability insurance administration percent)
Enter the percent amount paid to the state disability insurance.

Callback Factor
Enter the rate at which bargaining unit members should be paid if they are called to a job. For example, if the employee should be paid at the regular rate, enter *1* as the factor. Or if the employee should be paid time and a half, enter *1.5*.

Entering Bargaining Unit Partnership and Steward Data

Access the Partner/Steward page.



Partner/Steward page

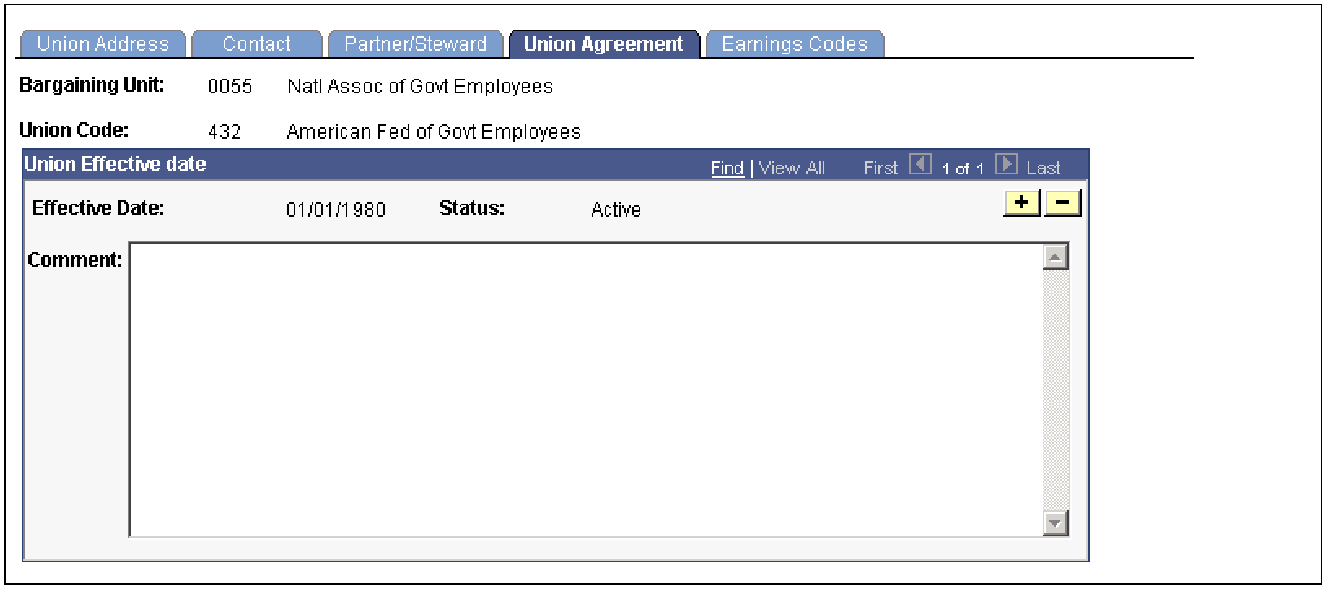
Scroll Area

Union Type
Indicate whether this bargaining unit is part of a private, public, or federal government union.

Date Union Recognized
Enter the date the union was recognized by your agency.

Entering Additional Bargaining Unit Contact Information

Access the Union Agreement page.

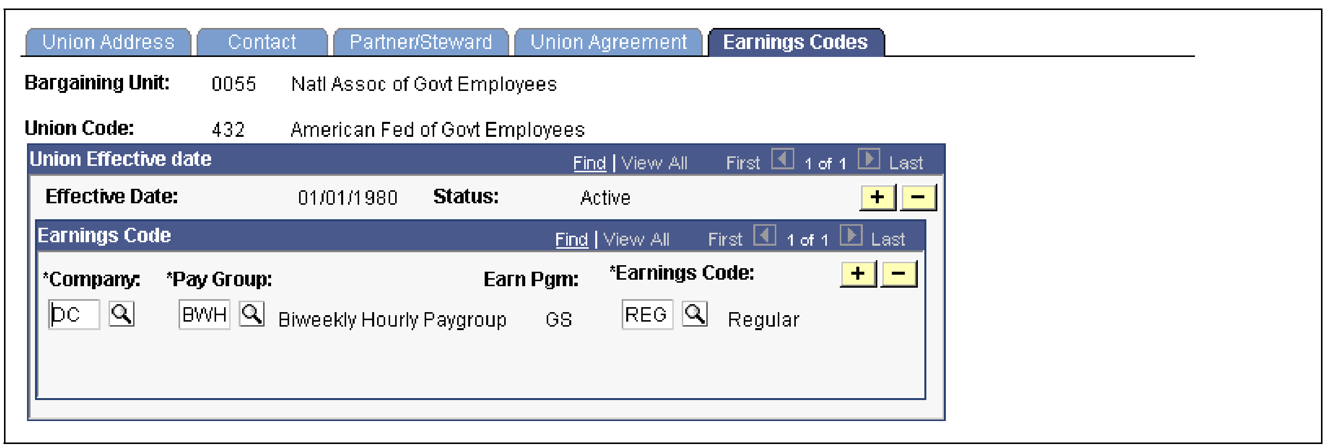


Union Agreement page

Type highlights of the union agreement in the space provided for bargaining unit/union agreement text. Enter more text than is visible in the group box, if needed. Use the inner scroll bar to navigate to text off of the screen.

Entering Allowable Earnings Codes for Bargaining Unit Members

Access the Earnings Codes page.



Earnings Codes page

Company Designate the company name.

Pay Group, Earn Pgm (pay group, earnings program) Select the pay group. When you move out of this field, the system displays the associated earnings program.

Earnings Code Select each earnings code that is valid for this union within each pay group.

(USF) Creating Labor Relations Classifications

Labor disputes might arise in your agency periodically, both for individual employees and for groups, such as unions representing their members. To help you track the critical information you need to resolve conflicts, use the pages in the Manage Labor Relations and Administer Workforce (USF) menus.

In this section, we discuss how to:

- Specify disciplinary offenses.
- Enter disciplinary data for employees.
- Specify the first penalty matrix for indicating the offense level penalties.
- Define the recommended disciplinary actions for each offense level and type.
- Define disciplinary actions.

Pages Used to Set Up US Federal Labor Relations Management

Page Name	Object Name	Navigation	Usage
Disciplinary Offenses Table	DISCIP_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Disciplinary Type USF, Disciplinary Offenses Table	Enter disciplinary data for an employee.
Disciplinary Penalty Matrix 1	GVT_DISCIP_OFFNSES	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Disciplinary Type USF, Disciplinary Penalty Matrix 1	Specify the first penalty matrix for indicating the offense level penalties.
Disciplinary Penalty Matrix 2	GVT_RECMND_ACTIONS	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Disciplinary Type USF, Disciplinary Penalty Matrix 2	Enter the recommended actions.
Disciplinary Step Table	GVT_DISCIP_STEP	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Disciplinary Steps USF, Disciplinary Step Table	Enter steps to be taken in the disciplinary process.
Disciplinary Events Table	GVT_DIS_EVENTS_TBL	Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Disciplinary Events USF, Disciplinary Events Table	Delineate the disciplinary events that occur in pursuing disciplinary actions.

Specifying Disciplinary Offenses

To identify the various types of violations employees commit where managers may need to impose disciplinary actions and the recommended penalties for each offense, first set up the Disciplinary Offenses table, Disciplinary Penalty Matrix 1, and Disciplinary Penalty Matrix 2.

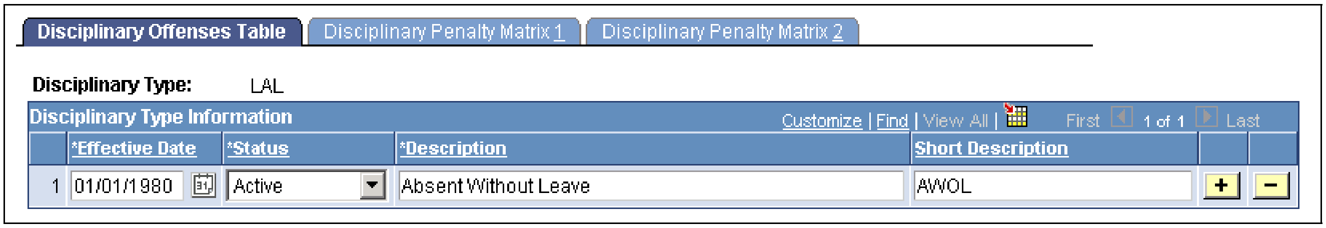
Sample Disciplinary Offenses and Descriptions

Your agency selects their disciplinary offenses and descriptions as needed. The following is a list of the values we have used in the model for managing labor relations.

Disciplinary Offenses	Descriptions
AWL	Absent without leave
DIS	Discrimination
FGH	Fighting
ICC	Improper use of credit card
INF	Inefficiency
INS	Insubordination
IPA	Improper political activity
ISL	Improper use of sick leave
LAT	Late for work
MIS	Misrepresentation
MVV	Safety violation-nonmotor vehicle
PER	Conducting personal affairs

Entering Disciplinary Data for Employees

Access the Disciplinary Offenses Table page.

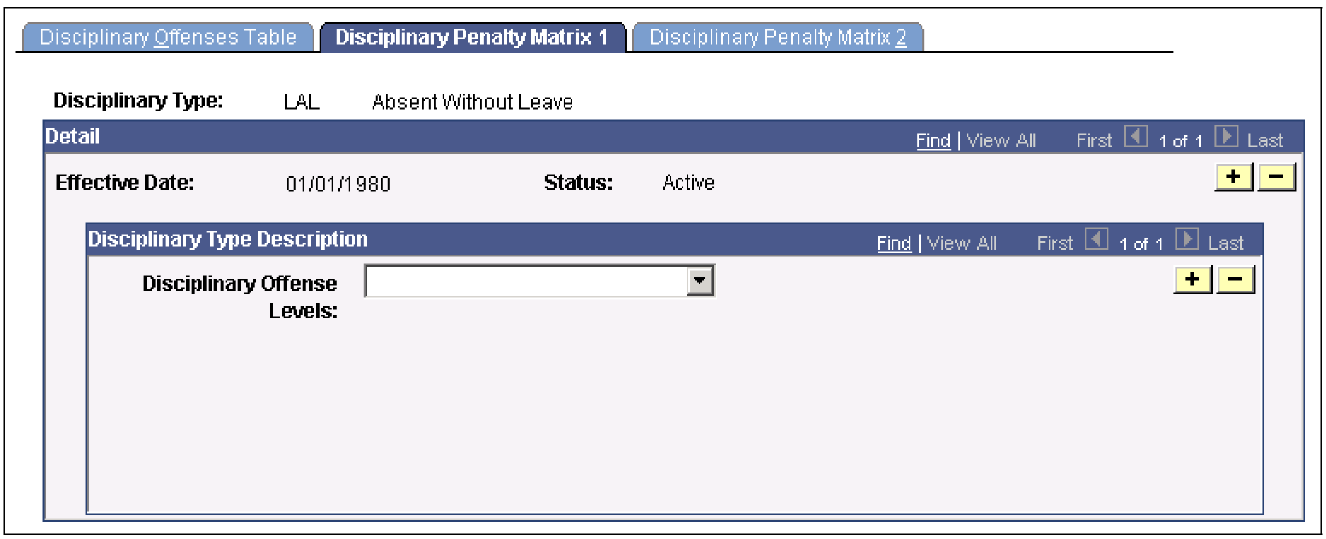


Disciplinary Offenses Table page

Effective Date Defaults to the system date, usually today's date. Change if you plan to use the Disciplinary Type listed for disciplinary actions that have an earlier effective date. We recommend that you set the effective date to a date that accounts for employee and job history, such as *January 1, 1980.*

Specifying the First Penalty Matrix for Indicating the Offense Level Penalties

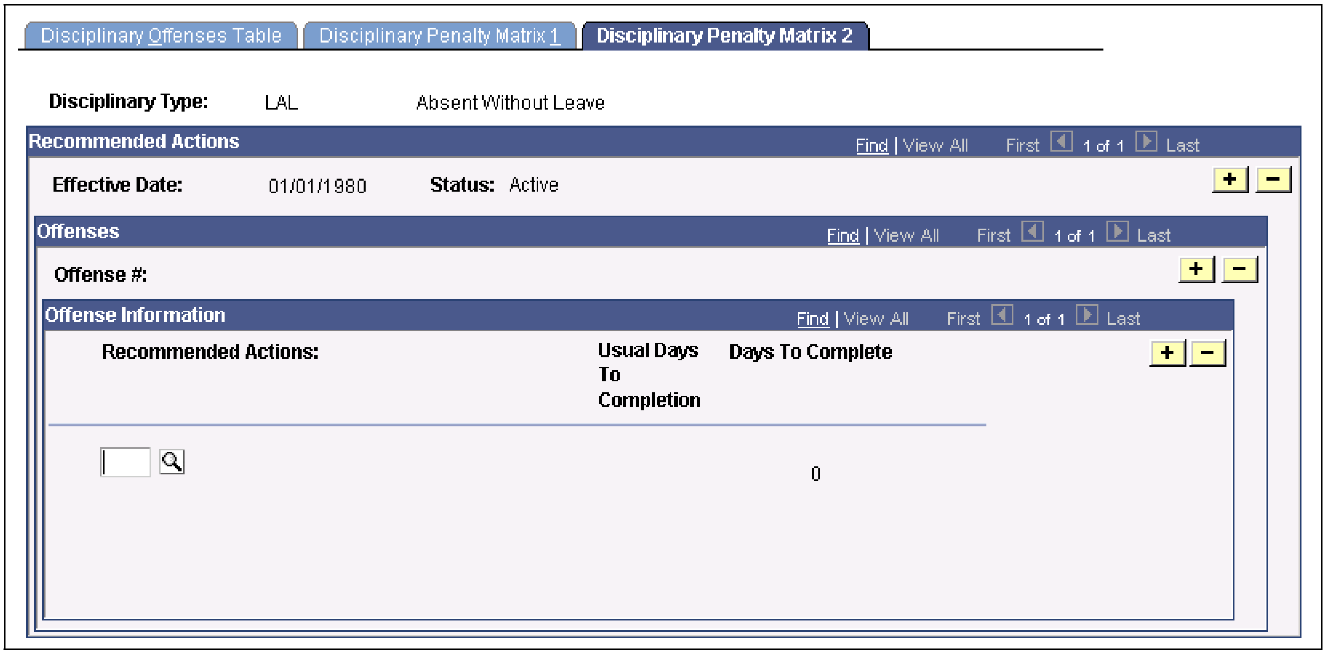
Access the Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 page.



Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 page

Defining the Recommended Disciplinary Actions for Each Offense Level and Type

Access the Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page.



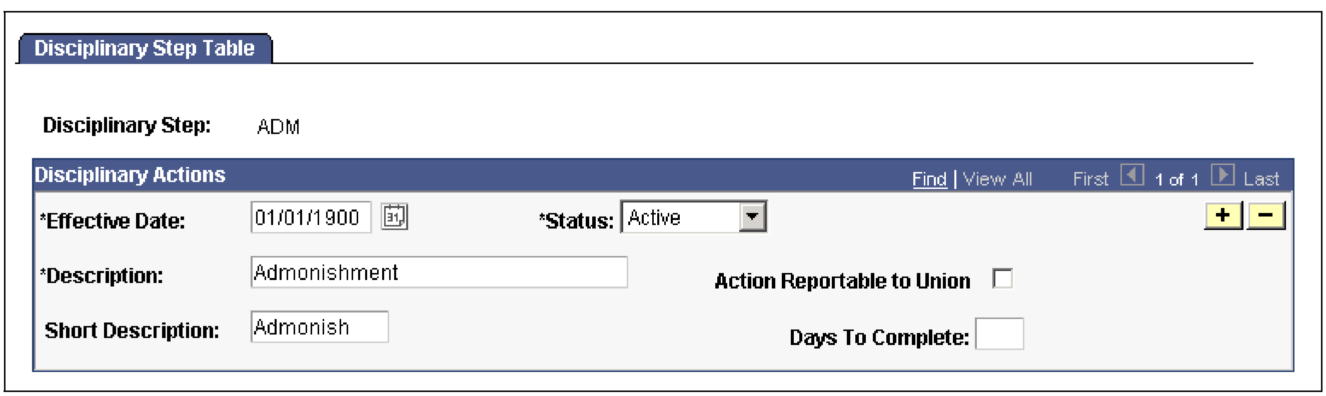
Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page

Recommended Actions Enter the recommended actions. The system automatically displays the Usual Days To Complete, as defined on the Disciplinary Events Table page.

This display helps managers approximate how long it will take to complete this action so they can plan how to fit each course of action into their workloads. Your labor relations specialists can establish these as experience dictates. However, government and agency policies or union agreements may affect these recommendations.

Defining Disciplinary Actions

Access the Disciplinary Step Table page.



Disciplinary Step Table page

Action Reportable to Union Select if the action disciplinary action should be reported to the union.

CHAPTER 4

Tracking Labor Relations Data

This chapter discusses how to:

- Track disciplinary actions.
- Track grievances.

Tracking Disciplinary Actions

If you take disciplinary action against one of your employees, it is important to keep an accurate record of the nature of the violation and the steps you take to respond to the incident. This helps protect your organization against legal liability.

Here's how you track disciplinary actions:

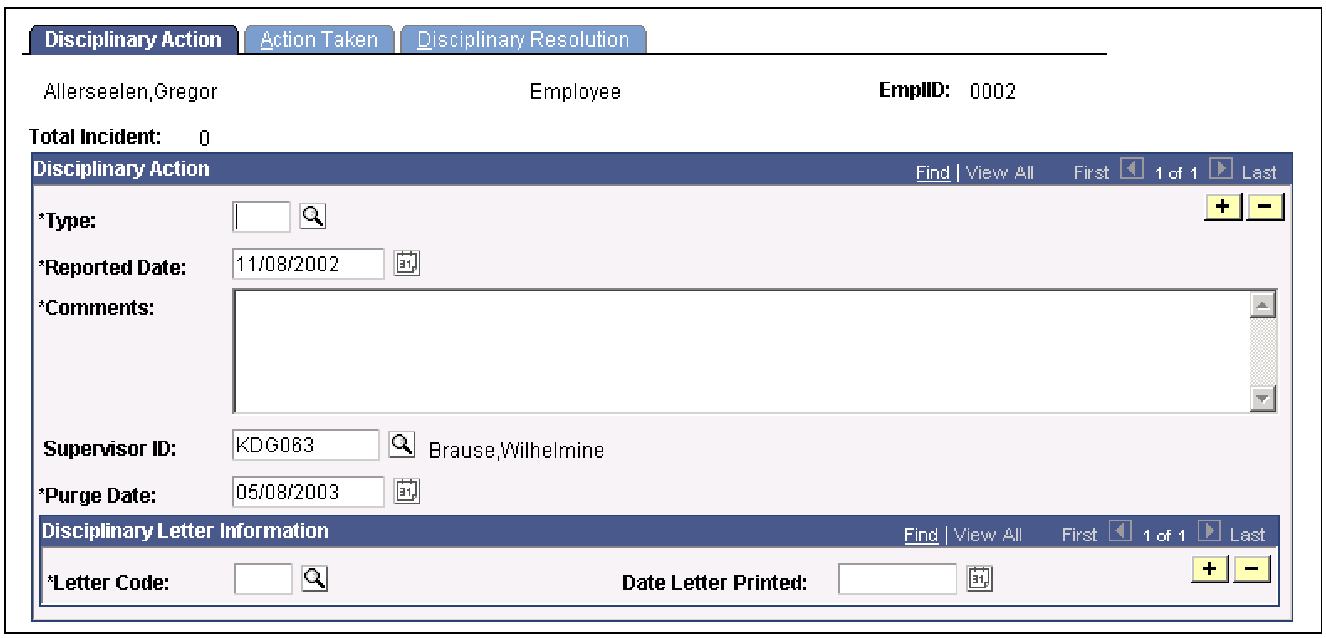
1. Identify the various types of violations employees commit that may require managers to take disciplinary actions using the Disciplinary Type Table page.
2. Identity the steps managers can take during the disciplinary action process using the Disciplinary Step Table page.
3. Identify the various types of actions managers can take to resolve disciplinary violations using the Resolution Type Table page.
4. Enter details of particular disciplinary incidents and the steps taken to resolve the incident using the Disciplinary Action component.
5. Use the Disciplinary Action page to describe the incident that required a disciplinary action.
6. Use the Action Taken page to document the disciplinary steps imposed on the employee.
7. Use the Disciplinary Resolution page to document how the incident was finally resolved.
8. Review the disciplinary actions that have been taken on your employees with the Employee Disciplinary Action report and the Discipline Action Summary report.

Pages Used to Track Disciplinary Actions

Page Name	Object Name	Navigation	Usage
Disciplinary Action	DISCIPLINARY_ACTN	Workforce Administration, Labor Relations, Record Disciplinary Actions, Disciplinary Action	Describe an incident that led to a disciplinary action against an employee.
Action Taken	ACTION_TAKEN	Workforce Administration, Labor Relations, Record Disciplinary Actions, Action Taken	Document details of disciplinary actions taken against an employee.
Disciplinary Resolution	DISCIP_ACTN_RESLTN	Workforce Administration, Labor Relations, Record Disciplinary Actions, Disciplinary Resolution	Record the final resolution of an incident that required disciplinary action.

Describing Disciplinary Incidents

Access the Disciplinary Action page.



Disciplinary Action page

Type

Select a disciplinary action type.

Reported Date

Defaults to the system date, usually today's date. Change the date unless the disciplinary action was reported today.

Incident Description

Enter a free-form description of the incident that led to the disciplinary action. Your description can be longer than the three lines shown.

Supervisor ID

The supervisor ID listed for this employee on the Job Data page. You can change this.

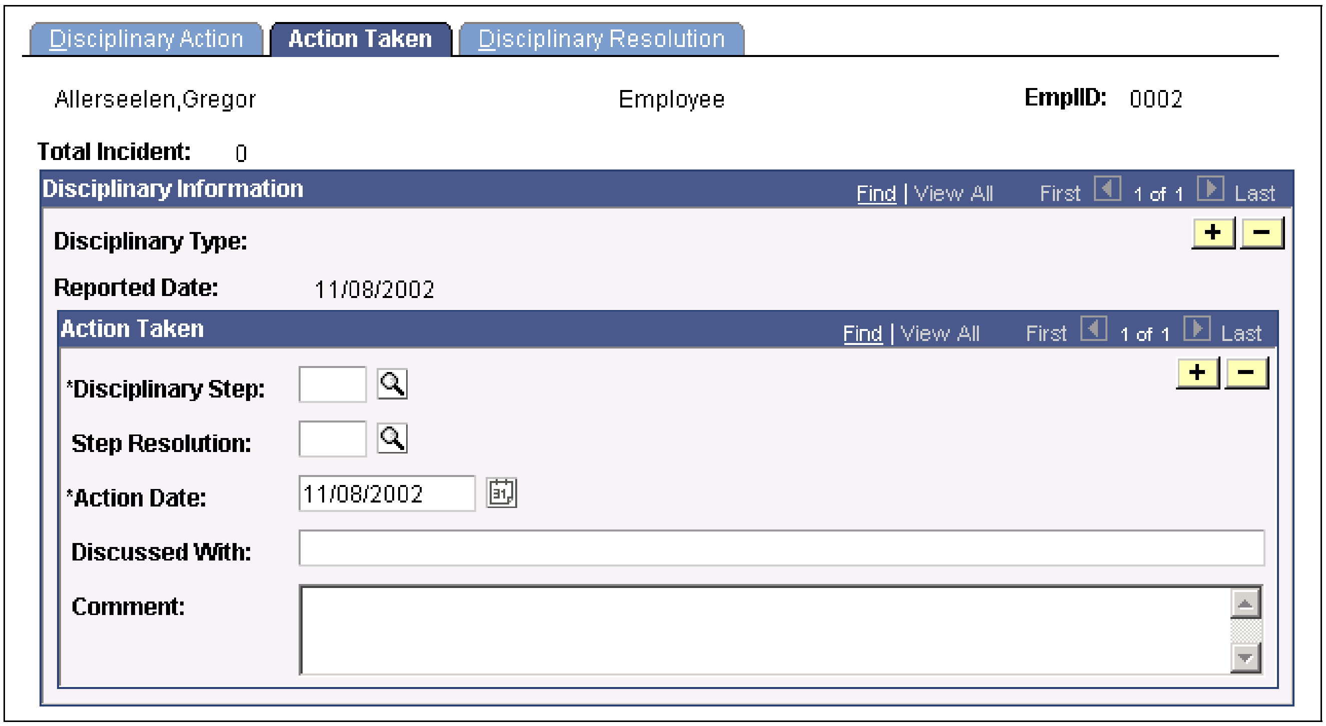
Purge Date The system automatically inserts a purge date of six months from the Reported Date.

Letter Code Select the type of letter you want to issue the employee.

Date Letter Printed The system generates this date when you run the standard letter process.

Documenting Disciplinary Action Details

Access the Action Taken page.



Action Taken page

Action Taken

Disciplinary Step Select a disciplinary step for the action taken to resolve the problem.

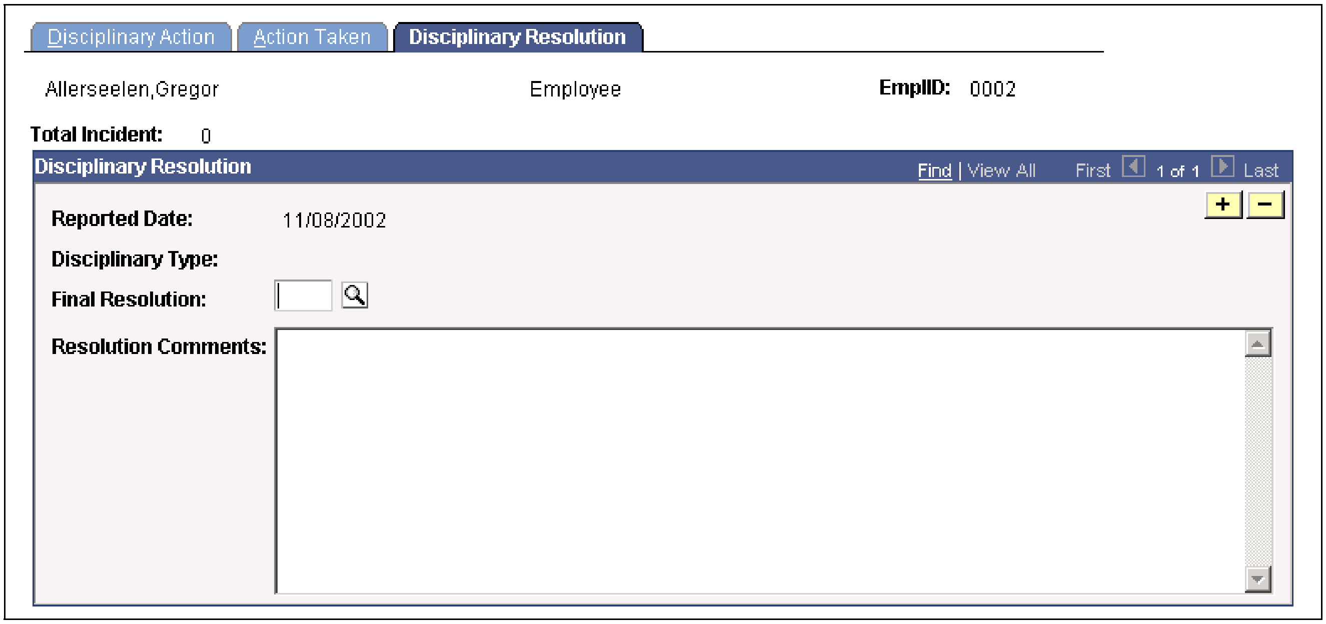
Step Resolution Select the resolution type that occurred for this step.

Action Date Enter the date when the disciplinary step took place. The default value is today’s date, which you will change unless the action taken in this step begins today.

Discussed With Enter the name of the person with whom you discussed the step.

Recording Incident Resolutions

Access the Disciplinary Resolution page.



Disciplinary Resolution page

Final Resolution Select the resolution type that discusses how the incident was finally resolved.

Resolution Comments Enter any comments you have about the final resolution. You can use more space than the three lines shown.

Reviewing Disciplinary Action Reports

Use the Employee Disciplinary Action report (OHS005) to review the disciplinary actions imposed on an employee. This Crystal report lists the detailed disciplinary action information for a specific employee within a specified date range and itemizes the action details within an incident.

Use the Discipline Action Summary report (OHS002) to review a summary description of disciplinary actions taken against employees within a specified date range. This Crystal report itemizes actions by date, by incident, and by employee.

Tracking Grievances

To help protect you from legal liability, it is important to keep an accurate record of workforce grievances and any actions taken when grievances are filed against your company. Use the Grievances pages to enter formal grievances filed by employees, applicants, unions, or other sources, and to track the steps taken to resolve the grievance.

Here’s how you track grievances:

1. Identify the various types of workforce grievances your organization may need to handle using the Grievance Type Table page.
2. Identify the standard course of steps managers can take during the grievance process using the Grievance Step Table page.

3. Enter details of particular grievances and the steps taken to resolve them using the Grievances component.
4. Use the Grievance page to describe the nature of the grievance.
5. Use the Grievance Steps page to record the steps taken to resolve the grievance.
6. Use the Grievance Resltn (grievance resolution) page to document how the grievance was finally resolved.
7. Review the grievances that have been filed against your organization using the Grievance Detail report (OHS004) and the Grievance Summary report (OHS006).

Pages Used to Track Grievances

Page Name	Object Name	Navigation	Usage
Grievance	GRIEVANCES1	Workforce Administration, Labor Relations, Record Grievances, Grievance	Add a new grievance into the system. You must have previously entered employee records, business units, and department information.
Grievance Steps	GRIEVANCES2	Workforce Administration, Labor Relations, Record Grievances, Grievance Steps	Record actions taken in response to employee grievances.
Grievance Resolution	GRIEVANCE_RESLTN	Workforce Administration, Labor Relations, Record Grievances, Grievance Resolution	Document the final resolution of an employee grievance.

Assigning Grievance IDs

When you open the Grievances component, the first thing you'll see is a box asking you to enter a grievance ID. Use the grievance ID to track a grievance through the entire resolution process. There are two ways to assign grievance IDs:

- Automatically: If you use automatic ID assignment, the system adds IDs sequentially as you add new grievances.

  If you let the system assign the number automatically, it first appears as *0000000000.* The actual number assigned to the grievance appears after you save the information you enter in the Grievances pages.

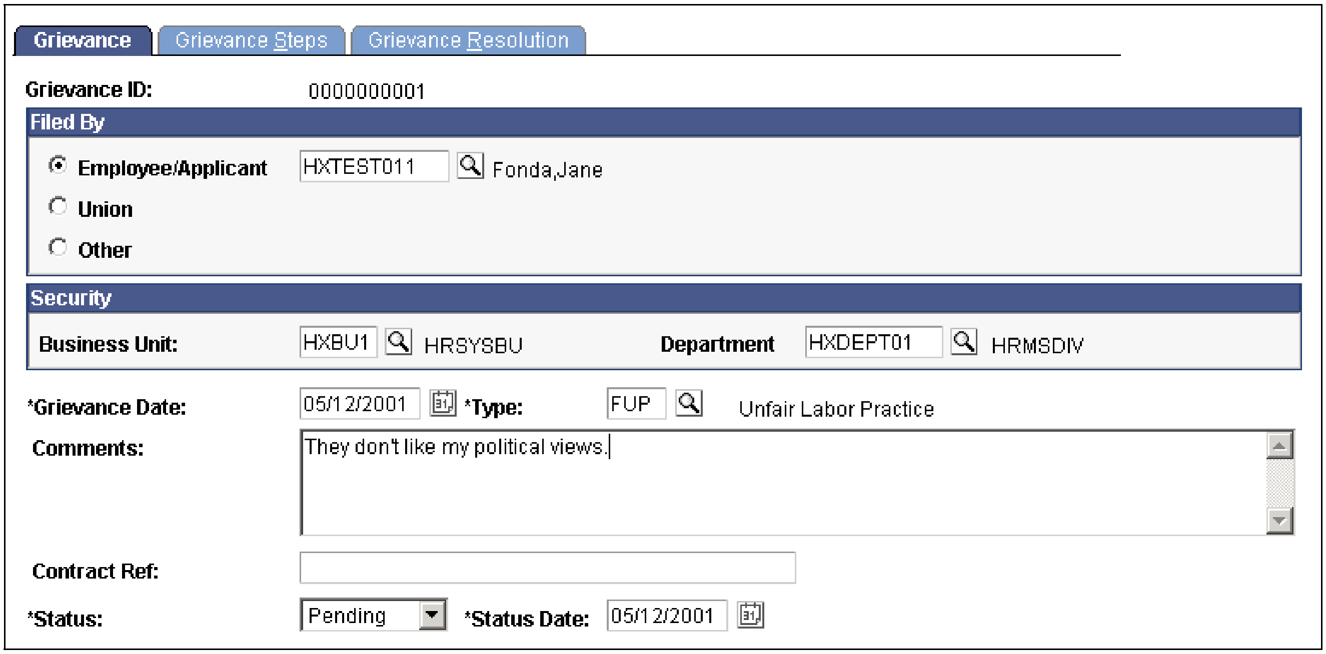
- Manually: Enter grievance IDs yourself, using whatever system you choose for your organization.

  If you choose manual entry, you don't need to assign IDs sequentially.

Note. To avoid maintaining two different sets of grievance IDs, we recommend that you choose only one way of assigning them. *Either* always assign IDs manually *or* always let the system assign them—not both.

Entering New Grievances

Access the Grievance page.



Grievance page

Filed By

If you are adding a grievance filed by an employee/applicant, click this button and enter the employee or applicant ID number in the adjacent field.

If you are entering a grievance filed by a union on behalf of union members, click the Union button and enter a union code in the adjacent field.

If you are entering a grievance that doesn't fall into either of the previous categories, select Other. In the adjacent field, enter free-form text up to 40 characters to describe who filed the grievance.

Security

Business Unit and **Department**

If you enter a business unit and department here, then only those users with security access to that department can access the grievance record when you save the information for this grievance. For example, if you select Department *10200* for Grievance ID *0000000001,* then when you save the page only users with security access to Department *10200* can access this record.

Note. If you don't enter a value in the Department field, then you won't set department level security for this record. The system defaults to no department security for grievance records.

Grievance Date

Defaults to the system date, usually today's date, which you can change unless the grievance was filed today.

Type

(Required) Select a grievance type.

Description

You can enter a grievance description longer than the three lines shown.

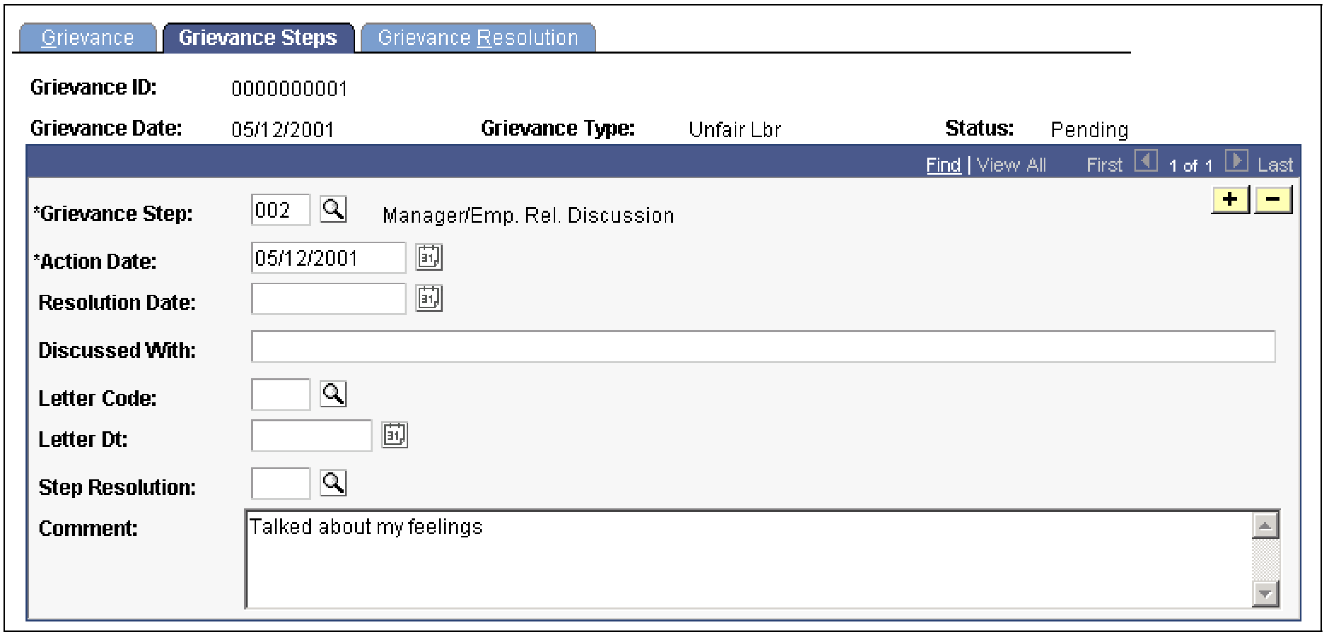
Contract Ref (contract reference)

Enter the contract reference for this grievance, if applicable.

Status and **Status Date** When you indicate the status of the grievance—*Settled, Pending,* or *Appealed*—the system defaults the Status Date field to the system date, usually today's date, which you can override if the status date is different.

Tracking Steps in the Grievance Process

Access the Grievance Steps page.



Grievance Steps page

Note. Grievances are sorted in descending order—you'll see the most recent one first.

Grievance Step Select the grievance step being taken in the grievance resolution process.

Action Date Defaults to today's date. Change the date unless this step begins today.

Resolution Date When the step is resolved, update this page by entering a resolution date, if applicable.

Discussed With Enter the name of the person with whom you discussed the step.

Letter Code If you want to send a standard letter about the grievance, select the appropriate letter code.

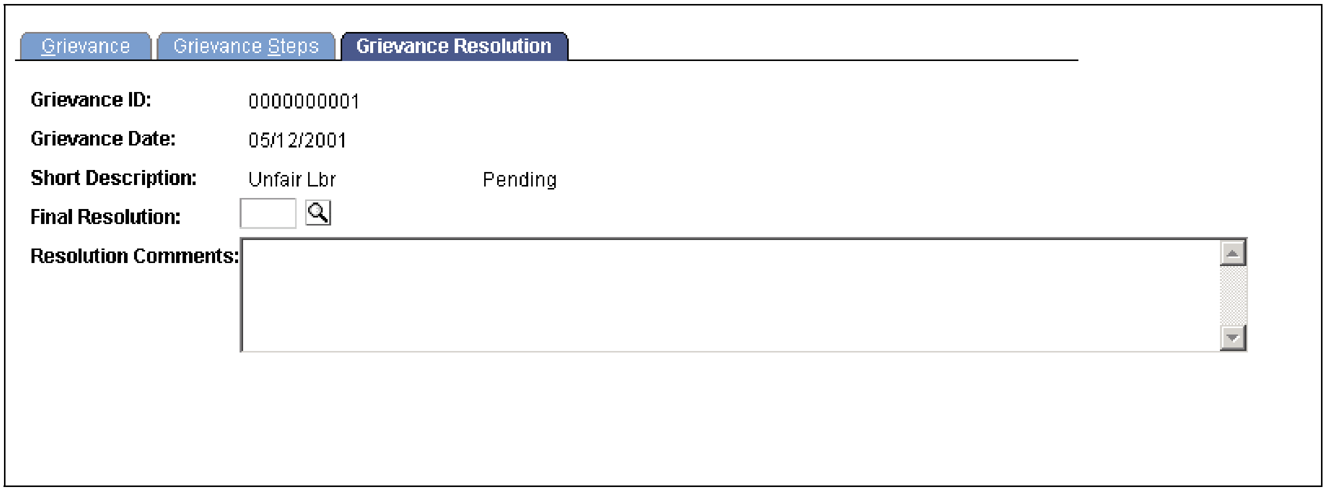
Letter Date Enter the date when the letter was sent.

Step Resolution Select the action you took to resolve this step.

Comment You can enter comments longer than the three lines shown.

Recording How Grievances Were Resolved

Access the Grievance Resolution page.



Grievance Resolution page

Final Resolution Select the resolution type that discusses how the incident was finally resolved.

Resolution Comments Enter any comments you have about the final resolution.

Reviewing Grievances

Use the Grievance Detail report (OHS004) to review the detailed information for a formally filed grievance against the company.

Use the Grievance Summary report (OHS006) to review a summary description of the grievances and their associated steps filed against the company within a specified date range.

CHAPTER 5

Requesting Works Councils Approval

This chapter discusses how to request works councils approval.

Prerequisites

Works councils members should use the Job Change Request pages to record works councils decisions about personnel actions affecting employees and HR managers should use them to request changes. Before using these pages, however, you must:

- Define job changes and reasons by regulatory region on the Job Change by Reg Region page.
- Initiate a personnel action on the Job Data component for an employee who is associated with a regulatory region. The action reason must be associated with a job change request.

All job change requests can be represented by a single process flow, with the exception of an Employee Transfer. Employee Transfers are an exception because they involve both a new requesting manager and the current manager who must approve the transfer. Once the current manager approves the transfer, the Employee Transfer business process is identical to the standard Request Job Change - Works Councils process.

See Also

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

Entering a Job Change Request

The Job Change Request pages enable you to easily notify the works councils of an employee job change before the change takes place so the change may be approved.

The Works Councils Notification process requires the following dynamic roles to be defined before generating a job change request. These dynamic roles will be used to route all workflows and email notifications:

Works Councils Member For employee-related job changes, you may associate a Works Councils ID with the Location/Company. The Works Councils ID will be used to route job change requests for an employee to the appropriate works councils member. If no works councils member is found for the employee, or if the works councils has no associated spokesperson, the HR Administrator will receive an error message when the Works Councils Notification process is triggered from the Request Job Change page.

HR Administrator

The HR Administrator who works on the job change request owns the request until the job change is complete. The system determines this according to department security setup—anyone with the role of HR administrator who has access to employees in department trees is notified with change request—the first HR administrator who takes action in the page is responsible for following the process from that point on.

Note. In the case of an employee transfer or any job change resulting in a department change, the HR Administrator of the employee's *new* department will be notified rather than the HR Administrator of the employee's current department. If no HR Administrator is found for the employee, you will receive an error message when the Works Councils Notification process is triggered from the Request Job Change - Works Councils page.

Manager

Manager self service security setup are used to route Works Councils related workflows to the correct manager. If no Manager is found for the employee, you will receive an error message when the Works Councils Notification process is triggered from the Request Job Change - Works Councils page.

Employee

Employees will be automatically notified via email once a job change request is complete.

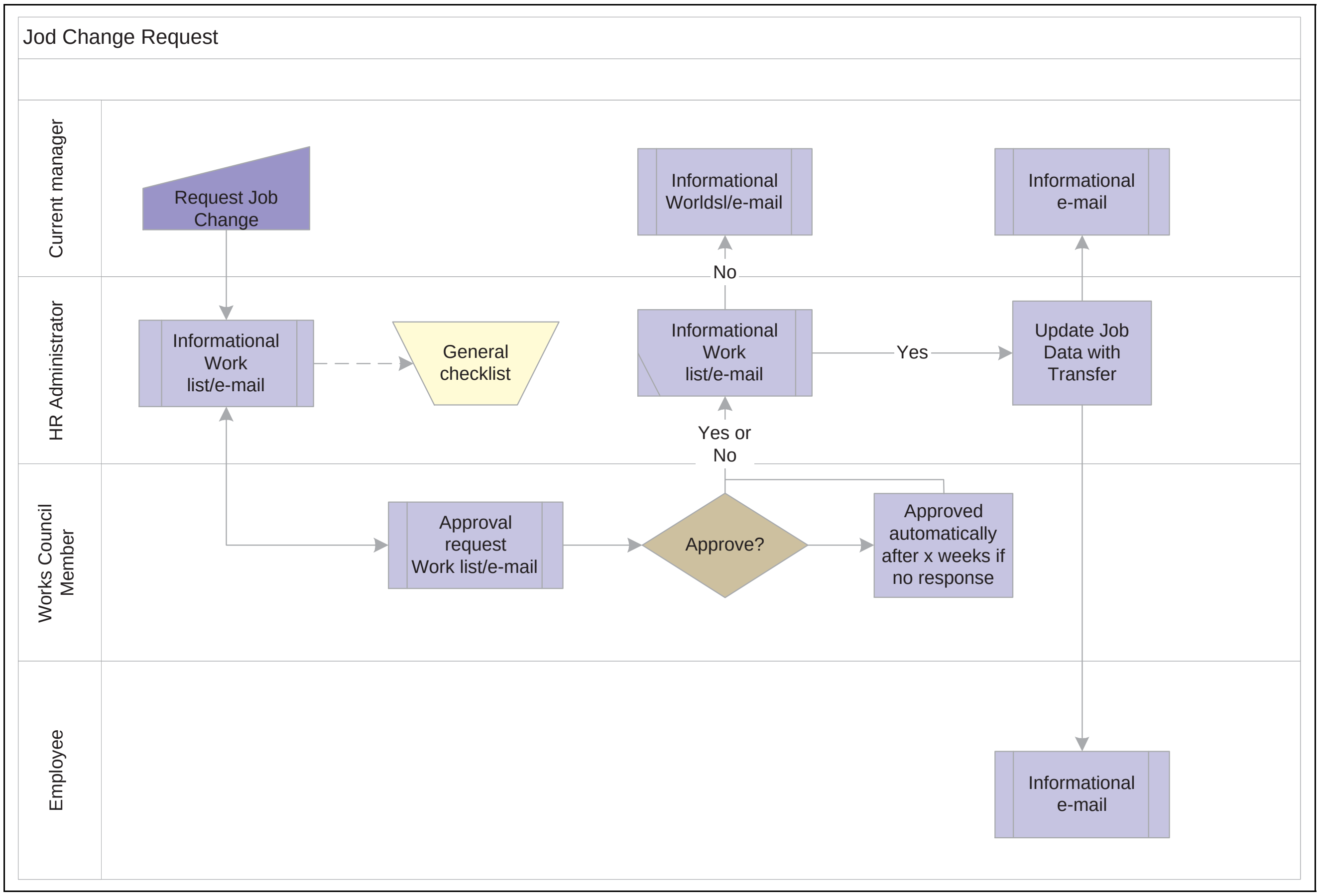
Security

A transaction requiring Works Councils approval may be initiated by the new manager, the current manager, or the HR Administrator. If the current manager initiates the job change request, they can then select the direct reports. If the new manager makes the request, they may select all employees. You must know the exact criteria to find the right employee, which you configured on the Job Change by Reg Region page.

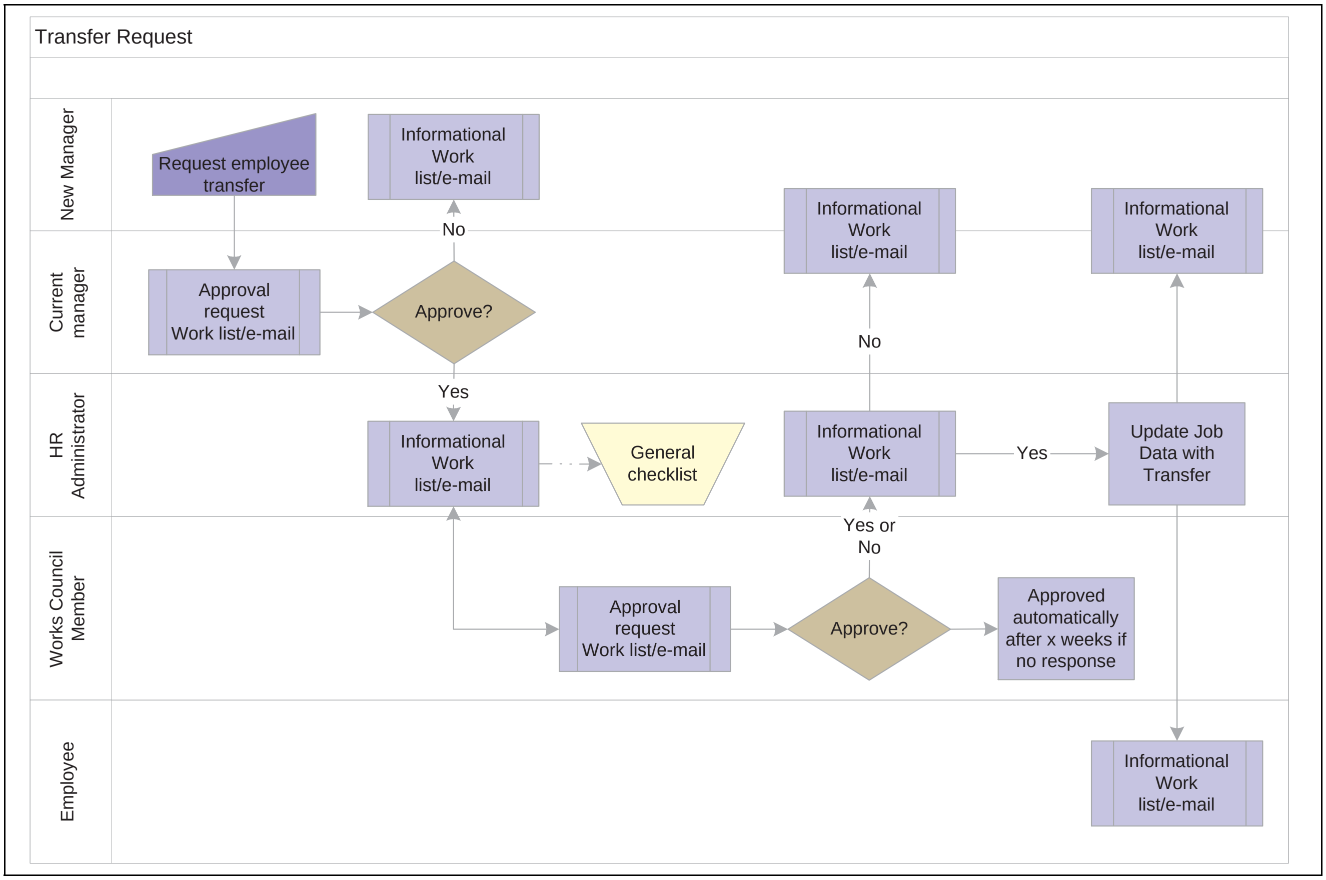
If the HR Administrator initiates the request, they may select all employees in the departments for which they are responsible as defined in the standard department security.

Note. In the case of a transfer, the new HR representative can select from all employees based on specific criteria.

The following diagrams illustrate the employee job change request process for a standard Employee Job Change process and for the Employee Transfer process:



Viewing the standard Employee Job Change process



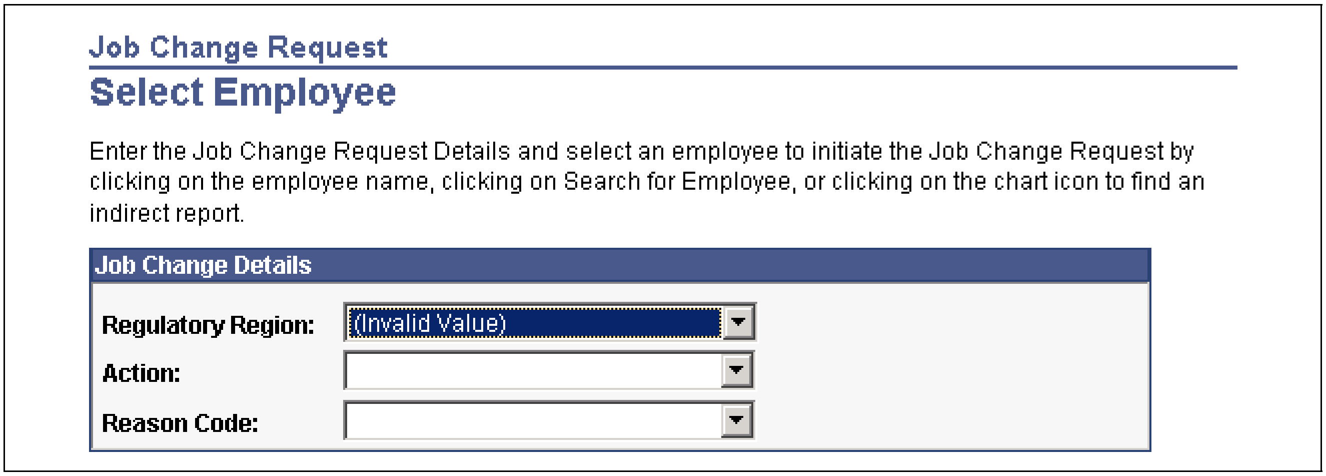
Viewing the Employee Transfer process

Pages Used to Enter Job Change Requests

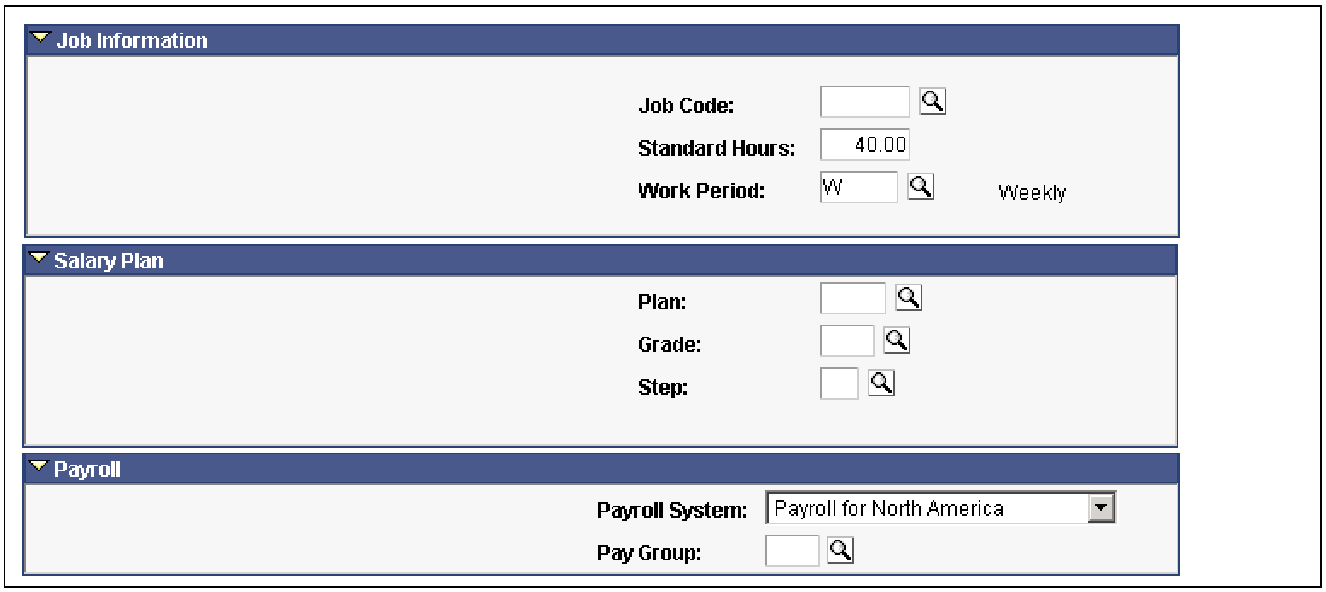
Page Name	Object Name	Navigation	Usage
Request Job Change - Select Employee	WC_JCR_SEARCH	Workforce Administration, Job Information, Request Job Change	Initiate the job change request.
Job Change Request	WC_JOB_CHG_REQ	Workforce Administration, Job Information, Request Job Change Enter Job Change Details and click Go	Enter job change details and request information.
Review My Job Change Request	WC_JCR_STATUS2_INQ	Workforce Administration, Job Information, Review My Job Change Request	Review the status of a job change request requiring Works Councils approval.
Job Change Request Approval	WC_JCR_APPR_INQ	Workforce Administration, Labor Relations, Job Change Request Approval	Mass-approve job change requests.

Entering Job Change Request Details

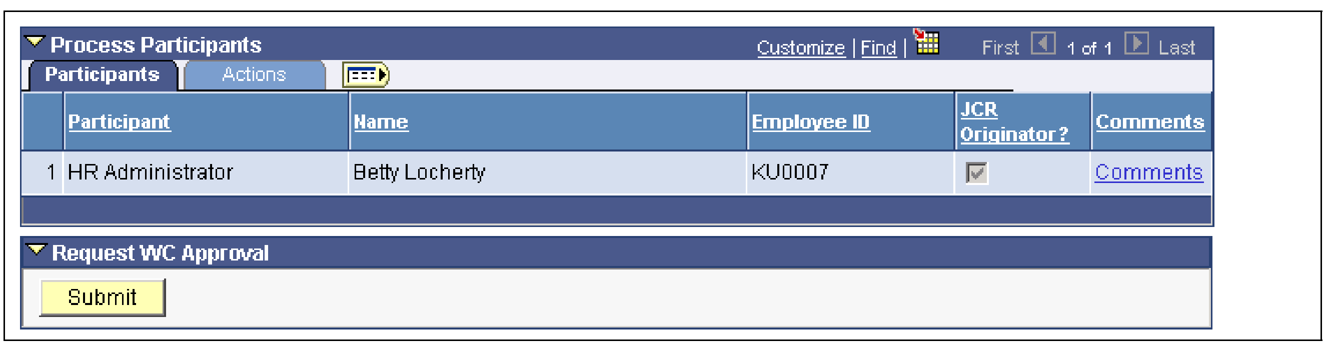
Access the Job Change Request - Select Employee page.



Job Change Request - Select Employee page (1 of 3)



Job Change Request - Select Employee page (2 of 3)



Job Change Request page - Select Employee page (3 of 3)

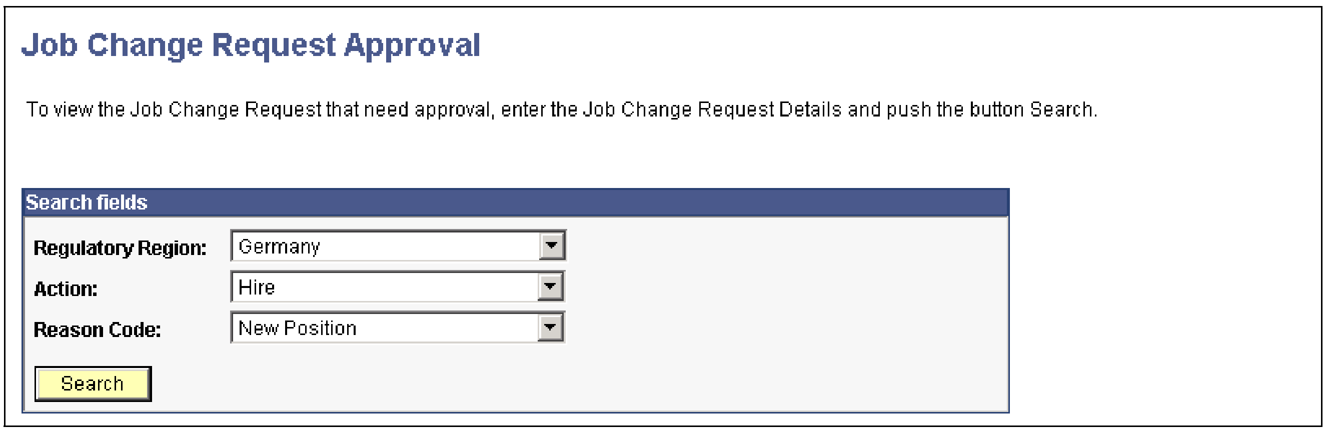
No Handicapped App Recommended

The HR Administrator is the only role that may select No Handicapped App Recommended before approving or denying the transaction. Some works councils want to ensure that the Labor Bureau had no qualified handicapped applicants to recommend prior to hiring other external candidates.

Current Info (current information)	Current information for this employee. Current information will not be displayed if the role is a new manager performing a job change request of a transfer. Additional new manager transactions can also be configured by customers on job change by reg region page
New Info (new information)	Specify new job information details for this job change request.
Process Participants	Everyone involved with requesting or approving job change requests. On the Job Change Request by Reg Region page you can define who is involved with a request and what information they can see, including new and current information.

Approving Job Change Requests

Access the Job Change Request Approval page.



Job Change Request Approval page

Search for all job change requests and approve all selected requests at once.

CHAPTER 6

(USF) Tracking Labor Relations Data

This chapter discusses how to:

- Enter union negotiability appeals for U.S. federal government employers.
- Use the disciplinary tracking system for U.S. federal government employers.

(USF) Entering Union Negotiability Appeals for U.S. Federal Government Employees

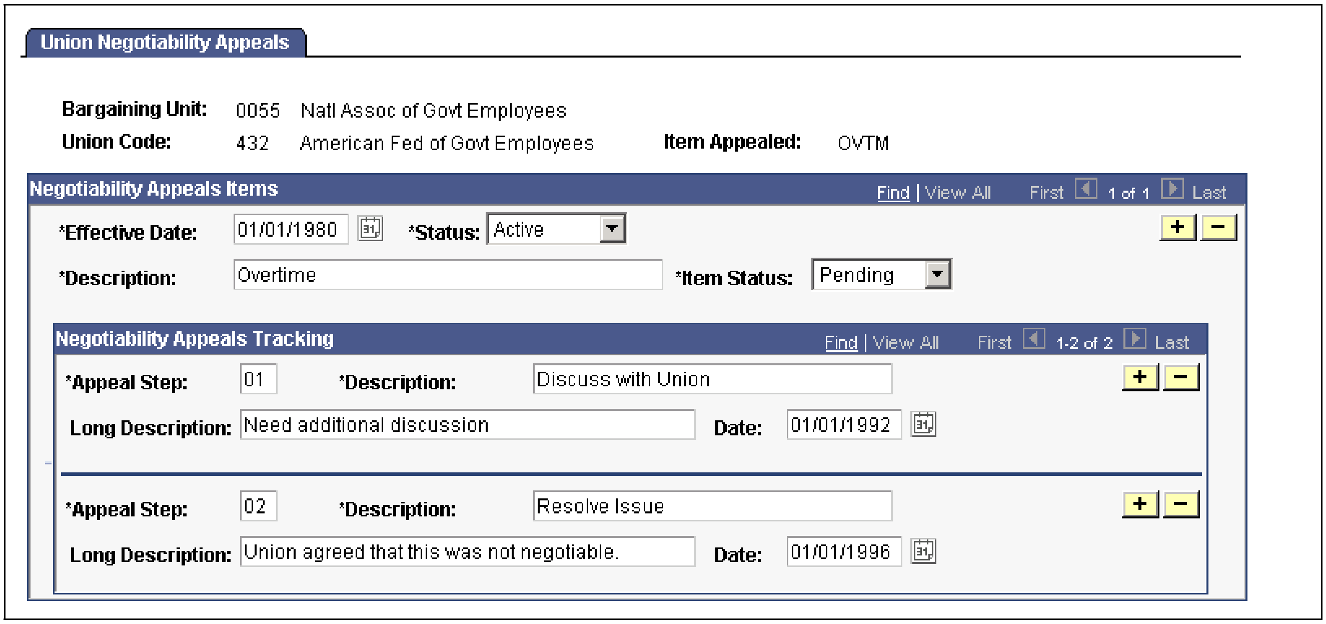
Once you've set up your union tables, use the Negotiability Appeals - Union Negotiability Appeals page to track union negotiability appeals items and the steps taken to resolve them.

Page Used to Enter Union Negotiability Appeals

Page Name	Object Name	Navigation	Usage
Union Negotiability Appeals	GVT_NEGBLTY_ITEMS	Workforce Administration, Labor Relations, Record Negotiability Appeal USF, Union Negotiability Appeals	Track union negotiability appeal items. You must have previously set up your union tables.

Tracking Union Negotiability Appeals

Access the Union Negotiability Appeals page.



Union Negotiability Appeals page

Item Status — Indicate the status of the appeal of this item. If the resolution affects the status of the item being appealed, update the Item Status field at the same time.

Appeal Step — Use only for sequencing the events or steps. Enter steps in the order in which they happened, if known.

Long Description — When that step is resolved, describe the resolution.

Date — Enter the date on which the step was or will be resolved.

(USF) Using the Disciplinary Tracking System for U.S. Federal Government Employees

Set up your disciplinary tables in either the Administer Workforce (USF) or the Manage Labor Relations (USF) menu. Once your disciplinary tables are set up, use the various disciplinary action pages to enter details and track actions for your agency's employees.

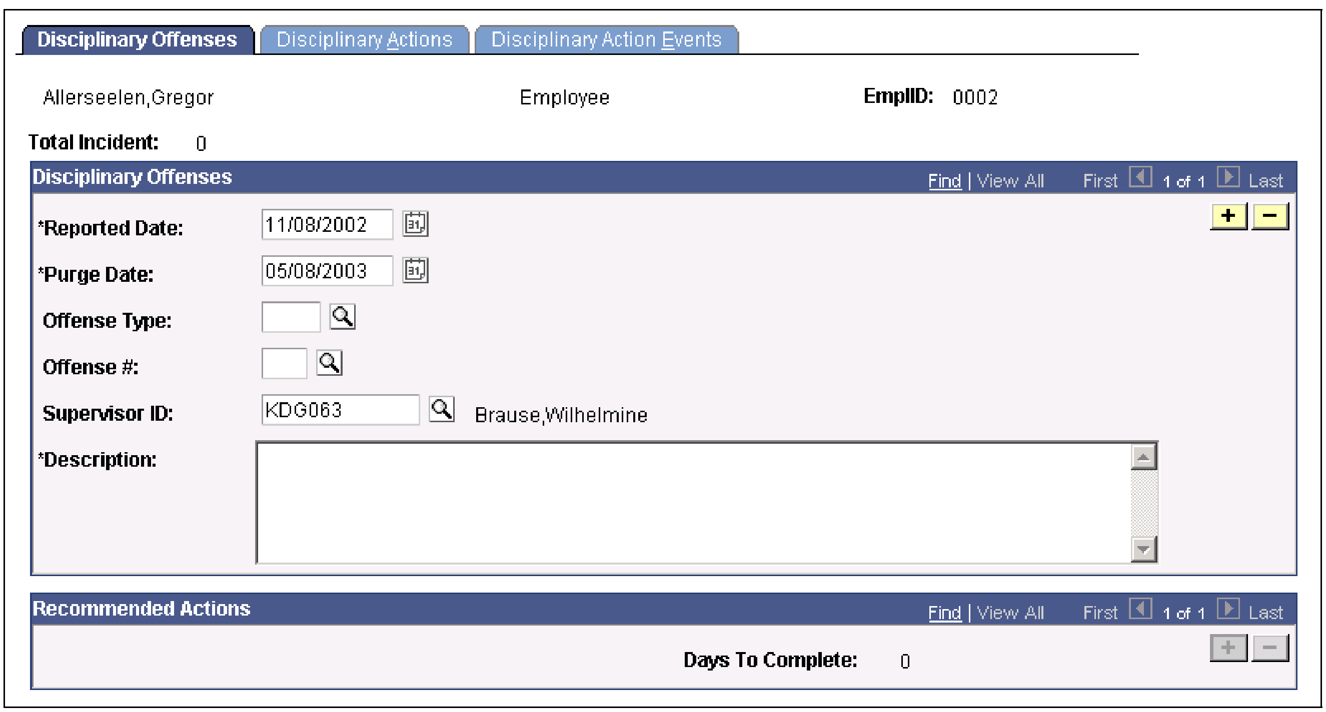
- Describe disciplinary offenses.
- Record related disciplinary action.
- Enter disciplinary events to support disciplinary actions.

Pages Used to Track Disciplinary Actions

Page Name	Object Name	Navigation	Usage
Disciplinary Offenses	GVT_DISCIPLIN_ACT1	Workforce Administration, Labor Relations, Record Disciplinary Actions USF, Disciplinary Offenses	Enter details about the disciplinary offenses that led to the disciplinary action being taken. First set up offense types on the Disciplinary Offenses Table page.
Disciplinary Actions	GVT_DISCIPLIN_ACT2	Workforce Administration, Labor Relations, Record Disciplinary Actions USF, Disciplinary Actions	Record what actions took place in response to the offense. First enter data on the Disciplinary Offenses page.
Disciplinary Action Events	GVT_DISP_ACTN_EVNT	Workforce Administration, Labor Relations, Record Disciplinary Actions USF, Disciplinary Action Events	Enter an event that discusses the steps of the disciplinary action that have taken place thus far. First enter data on the Disciplinary Offenses and Disciplinary Actions pages.

Describing Disciplinary Offenses

Access the Disciplinary Offenses page.



Disciplinary Offenses page

Total Incident — Each time you enter a new disciplinary offense for this employee, the system calculates and displays the total number of incidents.

Reported Date — Defaults to the system date, usually today's date. Change unless the disciplinary action begins today.

Purge Date — The system automatically inserts a purge date of six months from the reported date.

Offense Type and **Offense Number** — Select an offense type and number.

Once you have selected an offense type and number, the system automatically displays a list of all disciplinary actions recommended for this particular offense. The system also displays the recommended number of Days To Complete each action. These recommendations were created in the Disciplinary Penalties Matrices tables.

Supervisor ID — Defaults from the employee Employment Data page. Change if necessary.

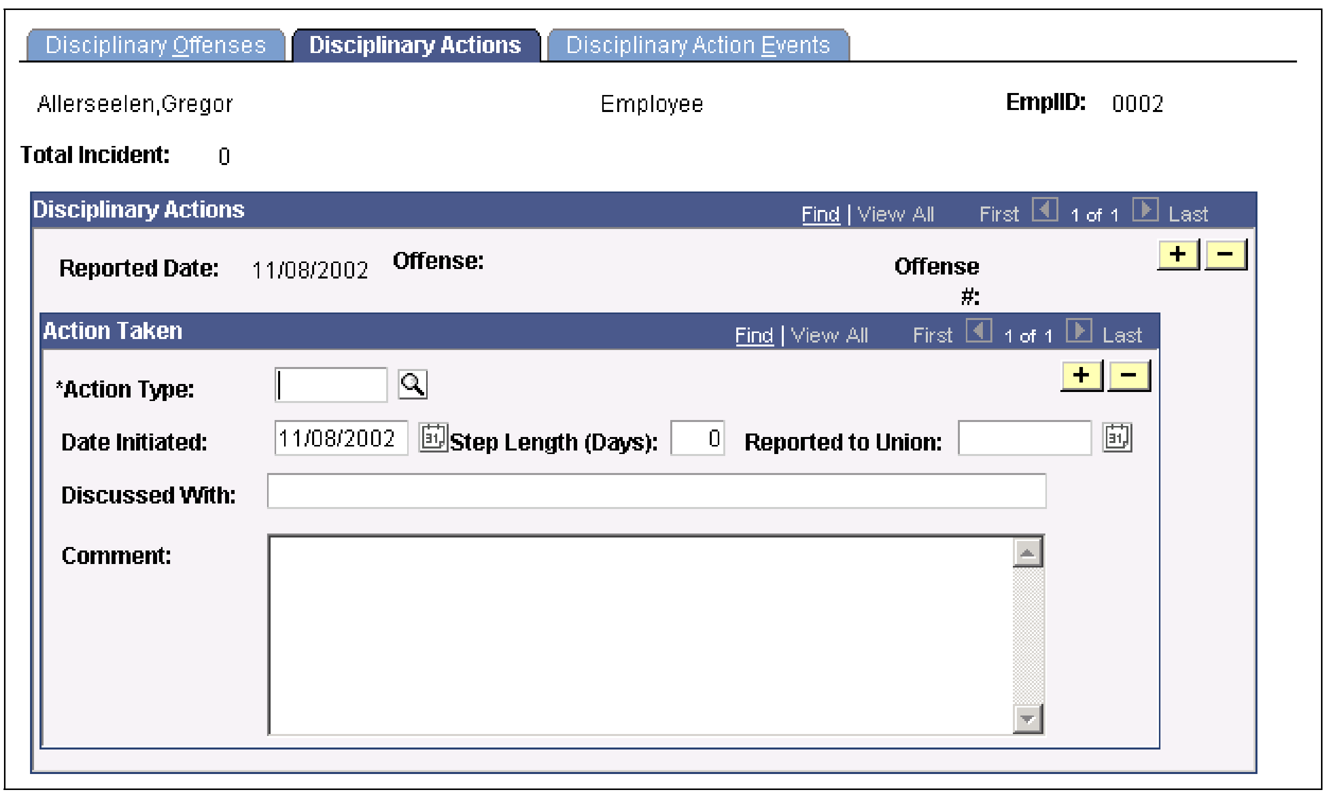
Description — Enter an incident description longer than the lines shown.

See Also

Chapter 3, "Setting Up Labor Relations Data," (USF) Creating Labor Relations Classifications, page 35

Recording Related Disciplinary Action

Access the Disciplinary Actions page.



Disciplinary Actions page

Action Type Select an action type to record the action taken to resolve the problem.

Date Initiated Defaults to today’s date. Change unless the action taken was initiated today.

Step Length (Days) If the action has a limited time frame, enter the duration, in days.

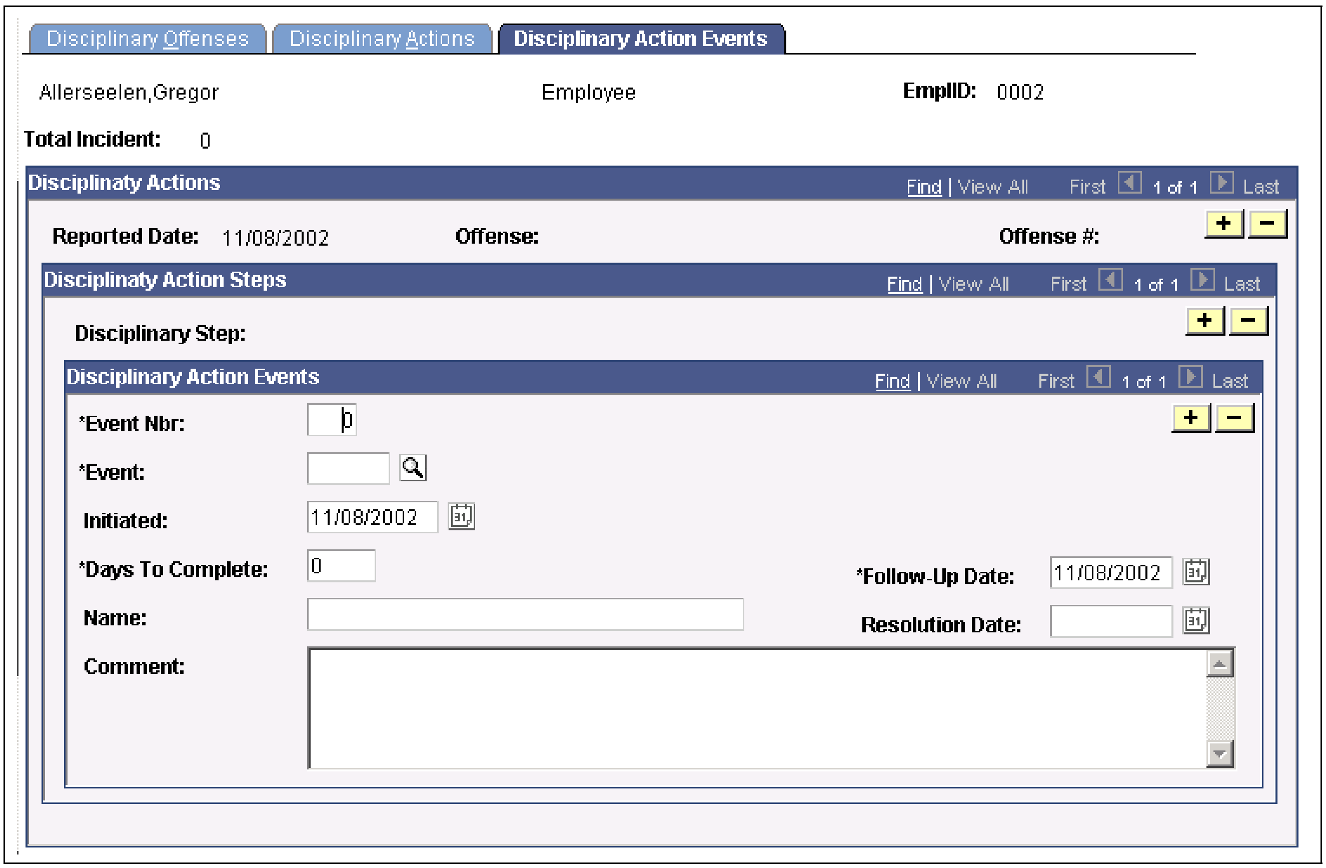
Reported To Union If your agency identified this type of action as reportable to the union(s), enter the date it was reported to the union(s).

Discussed With Enter the name of the person with whom you discussed the action (for example, a labor relations specialist).

Comment Once you have entered the data about the action taken, record the events supporting the action.

Entering Disciplinary Events to Support Disciplinary Actions

Access the Disciplinary Action Events page.



Disciplinary Action Events page

Event Nbr (event number) These disciplinary action events are stored and presented in numerical order based on the event number you assign. We recommend that you assign event numbers chronologically to give yourself a picture of the events as they happened. For events initiated on the same day, the event number can play a critical role when trying to avoid or settle litigation.

Event Select an event that discusses what took place at this point.

Initiated	The date the event was initiated defaults to today's date. Change the date unless it was actually initiated today.
Days To Complete	(Optional) Estimate a number of days to complete this event if you want or let it default from the Disciplinary Events table.
Name	Include the name (if any) of the person who initiated this event or was primarily responsible for resolving it.

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.

Index

A

Action Taken page 40–41
additional documentation viii
allowable earnings codes (CAN) 19
allowable earnings codes (USA) 19
application fundamentals vii

B

bargaining unit tables
  setting up (CAN) 20
  setting up (USA) 20

C

comments, submitting xi
common elements xi
Consolidated Publications Incorporated (CPI) viii
Contact and Contract Info page 30, 32
contact information xi
Contact Information page 20
Contact page 30
contract data
  entering (CAN) 18
  entering (USA) 18
Contract Data page 15
country-specific documentation x
cross-references x
Customer Connection Website viii

D

Decision Group Table page 27
Decision Table page 27
Disciplinary Action Events page 55, 57
Disciplinary Action page 40
disciplinary actions
  reviewing 42
  tracking 39
Disciplinary Actions page 55–56
Disciplinary Events Table page 35
Disciplinary Offenses page 55
Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 page 37
Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page 37
Disciplinary Offenses Table page 35–36
Disciplinary Penalty Matrix 1 page 35
Disciplinary Penalty Matrix 2 page 35
Disciplinary Resolution page 40–41
Disciplinary Step Table page 15, 35, 38
disciplinary tracking system (USF)
  setting up 54
Disciplinary Type Table page 15
documentation
  country-specific x
  printed viii
  related viii
  updates viii

E

Earnings Codes page 30, 34
Empl Class Table page 10
employee classes
  defining 10

F

FORCEM 13
  See Also See Fundacion para la Formacion Continua
Fundacion para la Formacion Continua 13

G

General Bargaining Unit Data page 20
General Bargaining Unit Data Page 20
general union details
  entering (IND) 16
glossary 59
grievance IDs
  assigning 43
Grievance page 43
Grievance Resolution page 43, 45
Grievance Step Table page 15
Grievance Steps page 43, 45
Grievance Type Table page 15
grievances
  reviewing 46
  tracking 42

H

HRMS fundamental tables
  setting up 2

J

Job Change by Reg Region page 22, 25
job change request
  entering 47
Job Change Request - Select Employee page 50
Job Change Request Approval page 50, 52
Job Change Request page 50

L

labor agreement
  defining 10
labor agreement categories
  defining 10
Labor Agreement Categories page 10, 12
Labor Agreement page 10
labor relations 14
  See Also manage labor relations
  France (FRA) 14
  India (IND) 12, 14
  setting up data (USF) 29
  Spain (ESP) 11, 13
labor relations classifications
  creating (USF) 35
labor relations data
  setting up 9
  tracking 53

M

manage labor relations 1
  See Also labor relations
  getting started 1
  implementing 1
  integrating 6
  setting up country-specific tables 2
manage labor relations tables
  setting up 2

N

notes x

P

Partner/Steward page 30, 33
PeopleBooks
  ordering viii
PeopleCode, typographical conventions ix
PeopleSoft application fundamentals vii
prerequisites vii
printed documentation viii

R

related documentation viii
Request Job Change - Select Employee page 50
Resolution Type page 15
Review My Job Change Request page 50

S

Spokesmen Comm page 27
suggestions, submitting xi
support tables
  setting up 6

T

Tariff Area Ger page 27
terms 59
typographical conventions ix

U

Union Address Information page 30–31
Union Address page 30
Union Agreement page 30, 33
union data
  setting up 9, 14
Union Earnings Distribution page 15, 18
Union Location page 15
Union Negotiability Appeals page 53
Union Table - Contract Data page 17
Union Table - Union Location page 15

V

visual cues x

W

warnings xi
Works Council Table page 22–23
works councils
  linking to location table 24
  requesting approval 47
  setting up 21
  setting up the business process (DEU) 26
  understanding 22