PeopleSoft®

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector

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PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector
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Contents

Chapter 3

About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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, https://www.peoplesoft.com/corp/en/login.jsp

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system 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 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 the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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.

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.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under 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.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources Manage French Public Sector Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Manage French Public Sector.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook.*

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface"

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook:

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured.
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 documentation 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.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) 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.

Chapters	Description
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.
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.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
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 Manage French Public Sector

This chapter discusses:

- Manage French Public Sector overview.
- Manage French Public Sector business processes.
- Manage French Public Sector integrations.
- Manage French Public Sector implementation.

Manage French Public Sector Overview

The Manage French Public Sector business process enables French customers to hire public sector employees and provides functionality to manage probation periods, tenure, step increments, grade promotions, secondment, and budgetary headcount.

You can use the standard Human Resources functionality and reports by merging French Public Sector data with Human Resources data.

Manage French Public Sector Business Processes

The business processes for Manage French Public Sector are:

- Administer hiring.
- Rate employees.
- Process tenure.
- Manage the promotion probation period.
- Calculate seniority.
- Process career advancement.
- Process grade promotions.
- Administer reclassification.
- Manage requests.
- Manage secondment.
- Manage headcount.
- Merge French Public Sector data with Human Resources data.

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

Manage French Public Sector Integrations

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

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

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

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

We discuss integration considerations in this PeopleBook.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with Enterprise Integration Points in PeopleSoft HRMS"

Manage French Public Sector Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface"

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Understanding Manage French Public Sector

This chapter discusses:

- Manage French Public Sector.
- Manage French Public Sector business processes.

Manage French Public Sector

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

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

Manage French Public Sector Business Processes

Manage French Public Sector supports the following business processes:

- Administer Hiring.

  Record new French public sector employees in the system and enter key data such as personal information, civil service position, and assignment and career data.

- Rating Employees.

  Identify employees to be rated and calculate final ratings for each employee using a system-calculated adjustment constant.

- Processing Trainee Tenure.

  Calculate tenure dates and then identify employees ready to be granted tenure. Approve or deny employees' probation periods and grant tenure.

- Managing the Promotion Probation Period.

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

- Calculating Seniority and Length of Service.

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

- Processing Career Advancement.

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

- Processing Grade Promotions.

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

- Administering Reclassification.

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

- Managing Requests.

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

- Managing Secondment.

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

- Managing Headcount.

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

- Merging French Public Sector Data With Human Resources Data.

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

See Also

Chapter 4, "Hiring French Public Sector Employees," page 51

Chapter 7, "Processing Trainee Tenure," page 109

Chapter 8, "Managing the Promotion Probation Period," page 117

Chapter 9, "Calculating Seniority and Length of Service," page 121

Chapter 10, "Processing Career Advancement," page 127

Chapter 11, "Running the Retroactivity Process," page 133

Chapter 12, "Processing Grade Promotions," page 135

Chapter 13, "Administering Reclassification," page 141

Chapter 14, "Managing Requests," page 147

Chapter 15, "Managing Secondment," page 153

Chapter 16, "Merging French Public Sector and Human Resources Files," page 161

Chapter 17, "Managing Headcount," page 165

Chapter 3

Setting Up French Public Sector Tables

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

- Define status and population codes.
- Define civil service positions.
- Set up actions.
- Set up retroactivity rules.
- Define individual and collective orders.
- Set up FPS installation parameters.
- Modify correspondence between gross and increased indexes.
- Define types of points.
- Set up salary scales.
- Set up salary grades.
- Define steps and substeps and advancement rules.
- Define corps.
- Set up grades.
- Define job codes and occupation codes.
- Set up host organizations.
- Establish the employer contribution rate.
- Define degree subject codes.
- Run Manage French Public Sector table reports.

Understanding French Public Sector Setup

Before you can perform business processes specific to Manage French Public Sector (FPS), you must establish FPS-specific system parameters that define basic operational rules and drive the software package.

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

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

   When you set up actions, you need to:

  a. Enter action codes.
  b. Indicate the components where the action is available.
  c. Create action groups if you want to restrict available actions by user role.
  d. Indicate the actions available for specific status codes, civil service positions, and user roles.
  e. List any supporting documents that an action requires.

4. Set up FPS Installation Parameters.
5. Set up factors affecting compensation:
   a. Modify correspondence between gross and increased indexes.
   b. Define types of points.
   c. Set up salary scales.
   d. Set up salary grades.
   e. Define steps and substeps and advancement rules.
6. Set up corps and grades.
7. Define job codes.

   Enter job codes using the global Job Code Table component.

   See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Jobs".
8. Enter data used for employees on secondment.
   - Set up host organizations.
   - Establish the employer contribution rate.
9. Deny component access to nonemployees.

Defining Status and Population Codes

To set up status and population codes, use the Status/Population Codes (FPMSTATUSEE_PNL) component. This section provides an overview of employee status and discusses how to add or change an employee status code.

Understanding Employee Status

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

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

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

- The employee is associated with a salary grade or a step.

  Compensation based on salary grade implies that the employee is associated with a salary grade table and a step; implies some business rules. This data is managed from the Career Data pages.

- The employee's compensation amount is directly selected (free compensation).

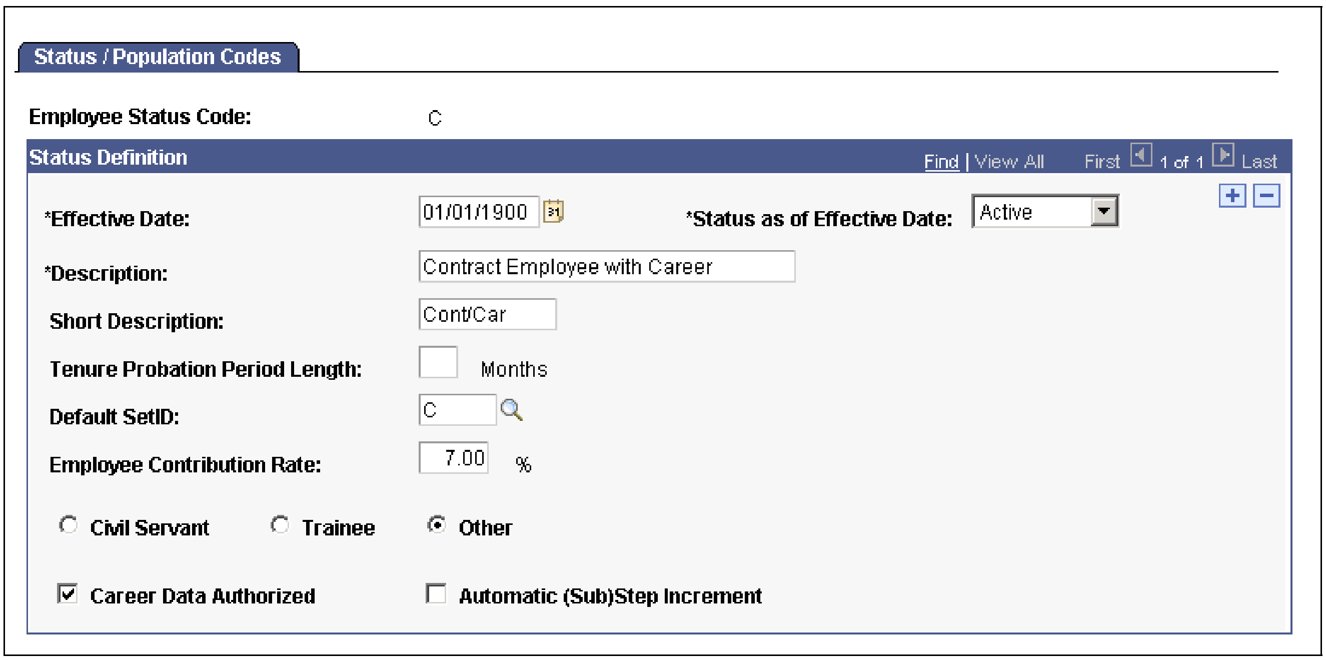
The Manage French Public Sector business process distinguishes between these two modes of compensation by giving access to a data group with career (grade/step) or a data group without career (free compensation).

Page Used to Define Status and Population Codes

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

Adding or Changing an Employee Status Code

Access the Status/Population Codes page.



Status/Population Codes page

Tenure Probation Period Length

Enter the length of the probation period for trainees.

Default SetID

Select the setID that matches the employee status code.

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

Employee Contribution Rate

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

Civil Servant, Trainee, and **Other**	Select the population type: Trainee means before tenure. Trainees go through the tenure process before changing status and becoming a civil servant. See Chapter 7, "Processing Trainee Tenure," page 109. Civil Servant means after tenure. Other is usually a contract employee.
Career Data Authorized	Select to indicate this employee status code is associated with a grade and a step.
Automatic (Sub)Step Increment	Select to authorize the automatic processing of step or substep increments.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Chapter 15, "Managing Secondment," Managing Contributions for Employees on External Secondment, page 157

Defining Civil Service Positions

The civil service position describes the activity or nonactivity of the employee. Throughout their time with the organization, employees have different civil service positions that affect career, compensation, and promotion. To define civil service positions, use the Civil Service Positions (FPMLEGALSTA_PNL) component.

This section discusses how to:

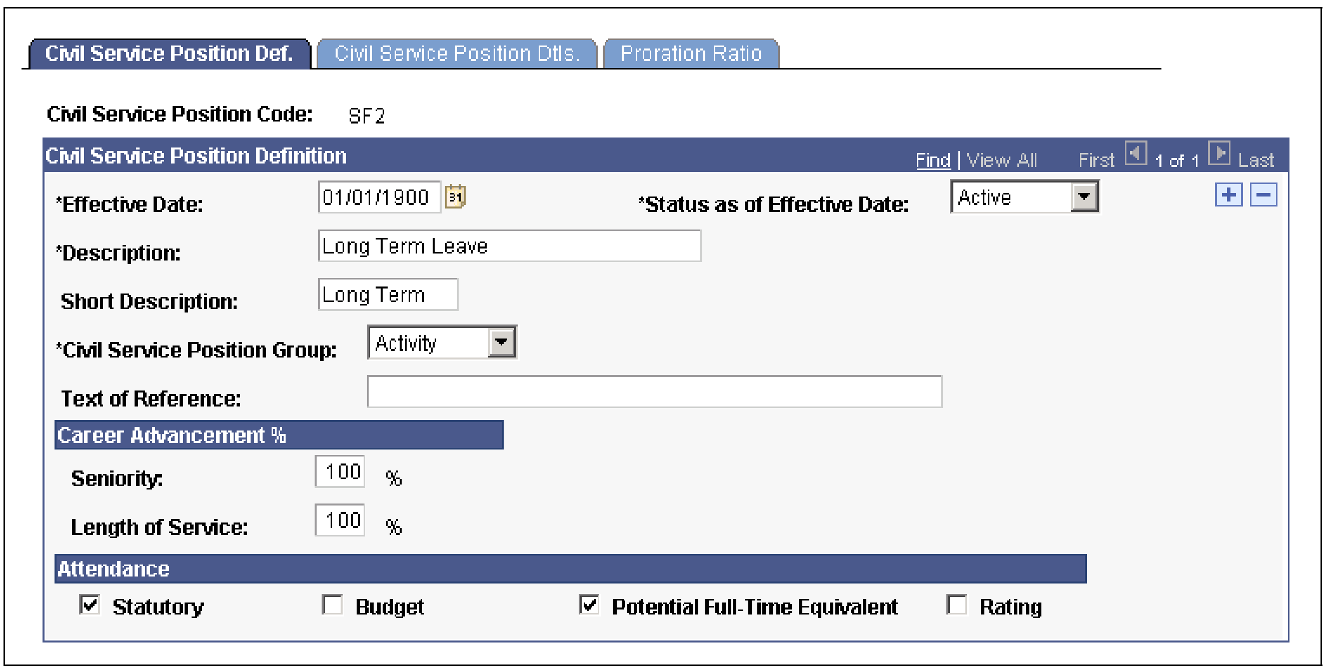
- Add or change a civil service position.
- Enter civil service position details.
- Record the proration ratios.

Pages Used to Define Civil Service Positions

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

Adding or Changing a Civil Service Position

Access the Civil Service Position Def page.



Civil Service Position Def page

Civil Service Position Group Select the civil service position group that corresponds to the official civil service position.

Text of Reference Enter the text that is associated with the position.

Career Advancement %

Seniority and **Length of Service**

Enter the percentages that are used to calculate seniority and length of service.

Attendance

Statutory, Budget, Potential Full-Time Equivalent, and **Rating**

Select the check boxes that apply to the civil service position. Indicate whether the position is considered budget headcount, statutory headcount, or potential full-time equivalent, or if the position should be considered in attendance time calculations for rating.

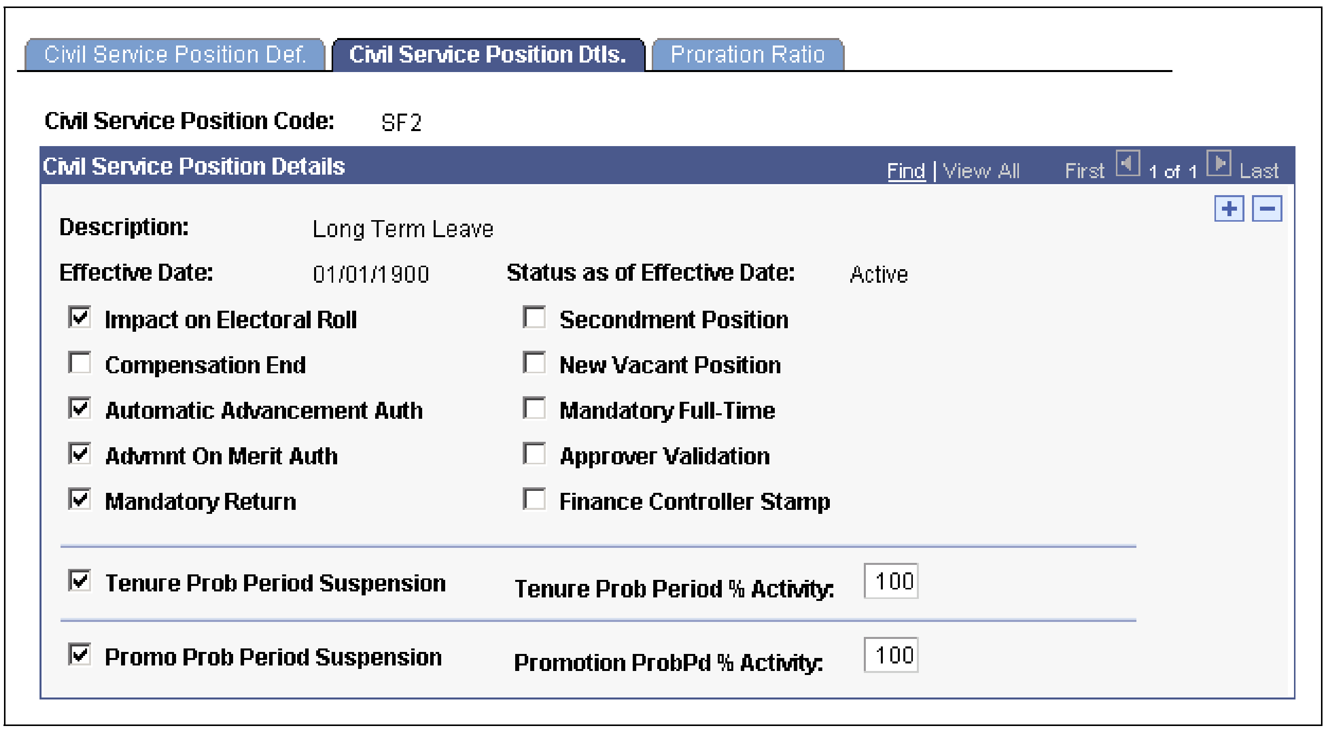
See Also

Chapter 6, "Rating Employees," page 103

Chapter 17, "Managing Headcount," page 165

Entering Civil Service Position Details

Access the Civil Service Position Dtls page.



Civil Service Position Dtls page

Impact on Electoral Roll

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

Compensation End

Select if the position suspends employee compensation. Informational only.

Automatic Advancement Auth (automatic advancement authorization)

Select if the position authorizes automatic advancement.

If the employee's position does not authorize automatic advancement, the advancement date is postponed until the end of the position. The Manage

French Public Sector business process calculates the seniority that the employee can carry over after advancement.

Advmnt on Merit Auth (advancement on merit authorization)
Select if the position authorizes advancement on merit.

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

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

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

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

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

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

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

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

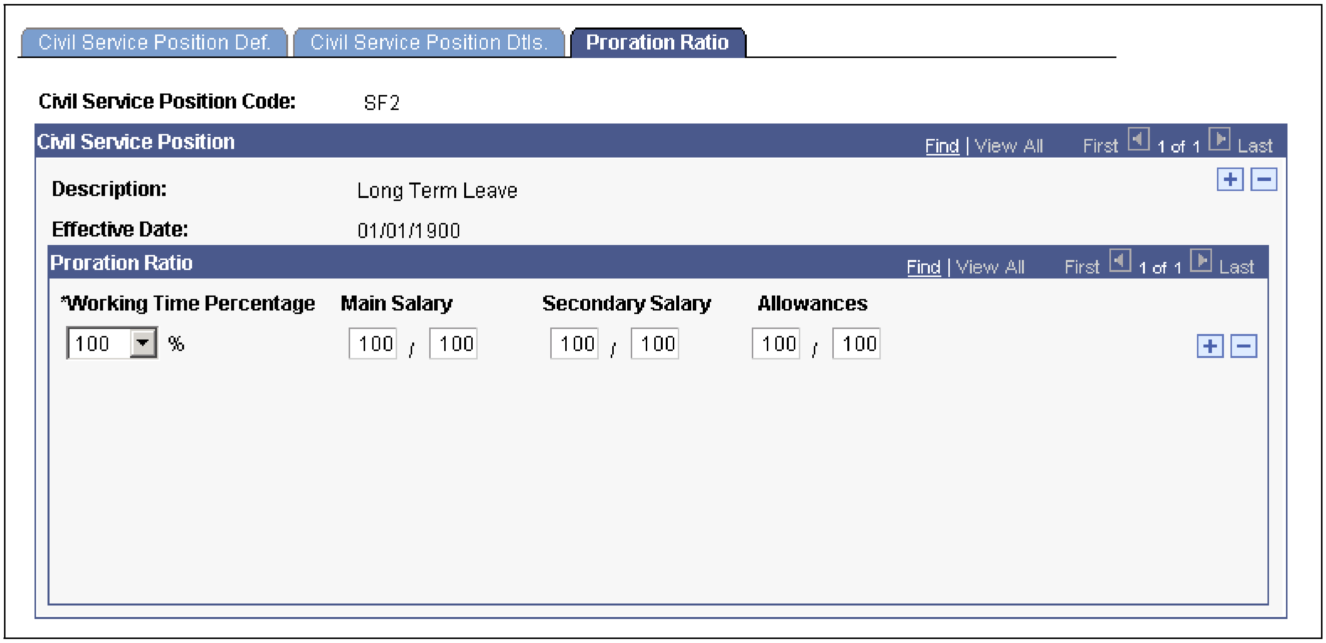
Promo Prob Period Suspension (promotion probation period suspension) and **Promotion ProbPd % Activity** (promotion probation period percent activity)
Select to suspend the promotion probation period. Only 0 and 100% values for probation period percent activity are considered.

See Also

Chapter 15, “Managing Secondment,” page 153

Recording Proration Ratios

Access the Proration Ratio page.



Proration Ratio page

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

Working Time Percentage Select the working time percentage. Values are *50, 60, 70, 80, 90,* and *100.* For each civil service position, three proration ratios are linked to each working time percentage.

Main Salary Enter the nominator and denominator of the fraction that is applied to the main salary. The system uses 100 as the default denominator.

Secondary Salary Enter the nominator and denominator of the fraction that is applied to the secondary salary, including bonus. The system uses 100 as the default denominator.

Allowances Enter the numerator and denominator of the fraction. The system uses 100 as the default denominator. You can give allowances:

- In addition to the main salary when the employee receives only part of the main salary, such as an employee on a gradual retirement plan.
- Instead of the main salary, such as an employee on training leave.

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

Setting Up Actions

In the Manage French Public Sector business process, you manage employee records by event. Actions describe the event that affects the employee record. To define actions, use these components: Actions (ACTION_TBL), Status/Actions (FPMACTSTATU_PNL), CS Position/Actions (FPMACTLEGAL_PNL), Action Groups (FPMACTNGRP_PNL), Action Authorization (FPMSCTYACTN_PNL), and Actions — Types of Documents (FPMACTDOC_PNL).

This section discusses how to:

- Define an action code.
- Assign FPS components that can use the action.
- Authorize actions by employee status.
- Authorize actions by civil service position.
- Create action groups.
- Define authorized actions by user role.
- List supporting documents.

Pages Used to Set Up Actions

Page Name	Object Name	Navigation	Usage
Actions	ACTION_TBL_GBL	Set Up HRMS, Product Related, Workforce Administration, Actions, Actions	Define an action code.
Reason Summary	ACTION_TBL2	Set Up HRMS, Product Related, Workforce Administration, Actions, Reason Summary	Displays the reasons associated with the selected action code.
FPS Action	FPMACTION_PNL2	Set Up HRMS, Product Related, Workforce Administration, Actions, FPS Actions	Assign the FPS components that can use the action.
Authorized Actions/Status	FPMACTSTATU_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Status/Actions	Authorize actions by employee status.
Authorized Actions/CS Positn (authorized actions/civil service position)	FPMACTLEGAL_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, CS Position/Actions	Authorize actions by civil service position.
Action Group	FPMACTNGRP_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Action Groups	Define an action group.
Action Authorization	FPMSCTYACTN_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Action Authorization	Define action groups that are authorized for a user role.
Type of Document	FPMDOCTYP_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Type of Document	Define types of supporting documents.
Actions - Type of Document	FPMACTDOC_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Actions - Types of Documents	List supporting documents that are required for an action.

Defining an Action Code

Access the Actions page.

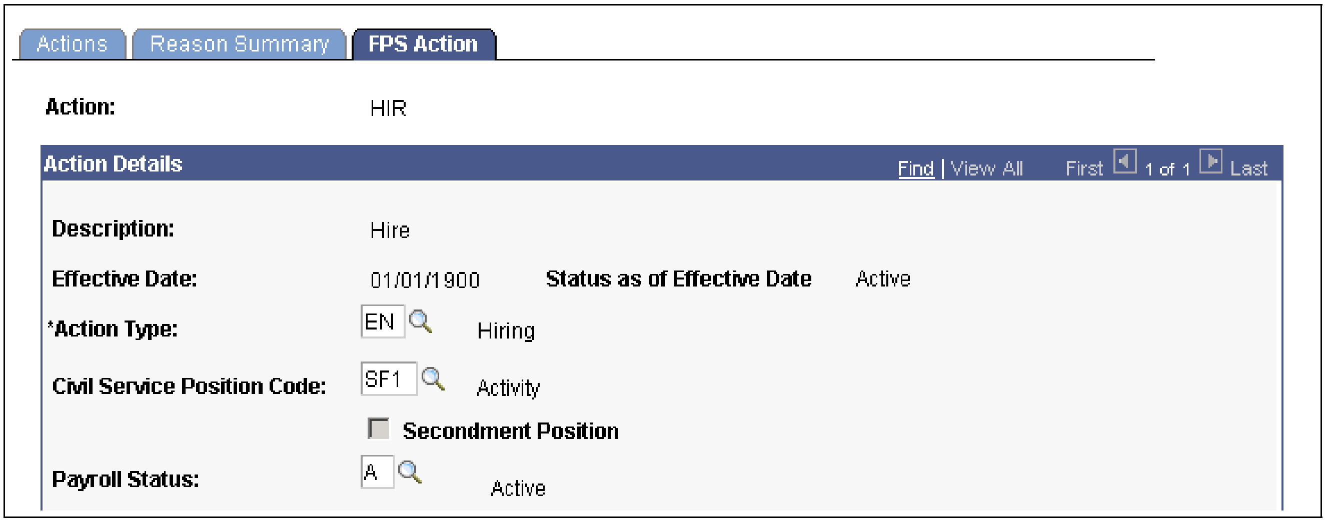
Use this page to define action codes. This page is documented in the *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce.*

See Also

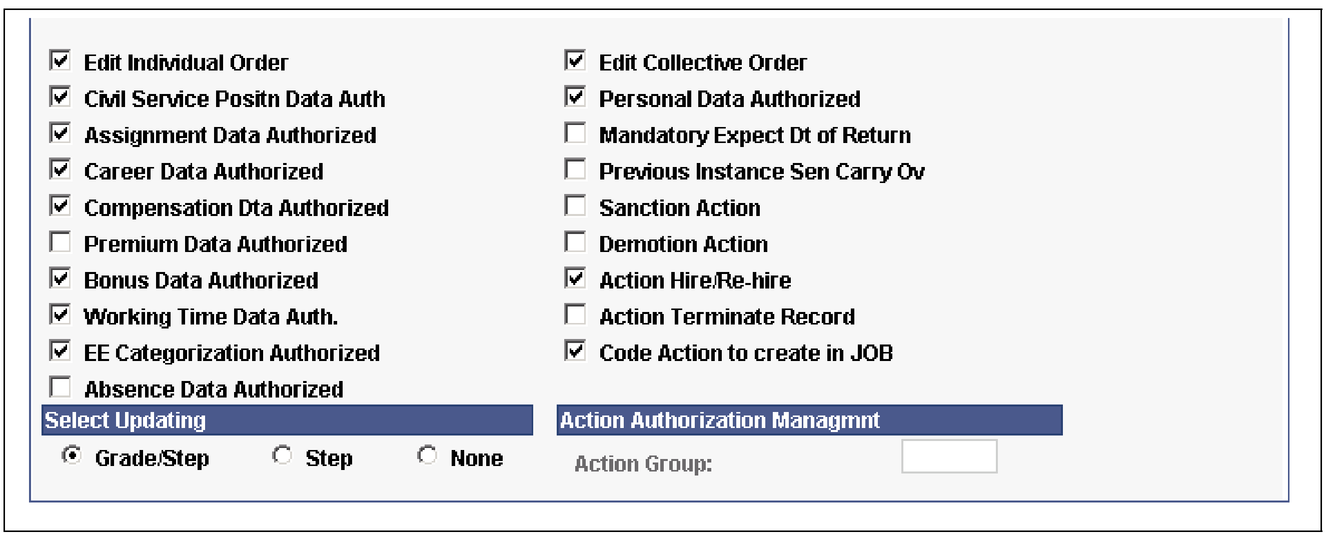
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Setting Up the Administer Workforce Business Process,” Defining Personnel Actions

Assigning FPS Components That Can Use the Action

Access the FPS Action page.



FPS Action page (1 of 2)



FPS Action page (2 of 2)

Description, Effective Date, Status as of Effective Date Displays the values defined on the Action page.

Action Type Select the action type for the action. Action types group related actions.

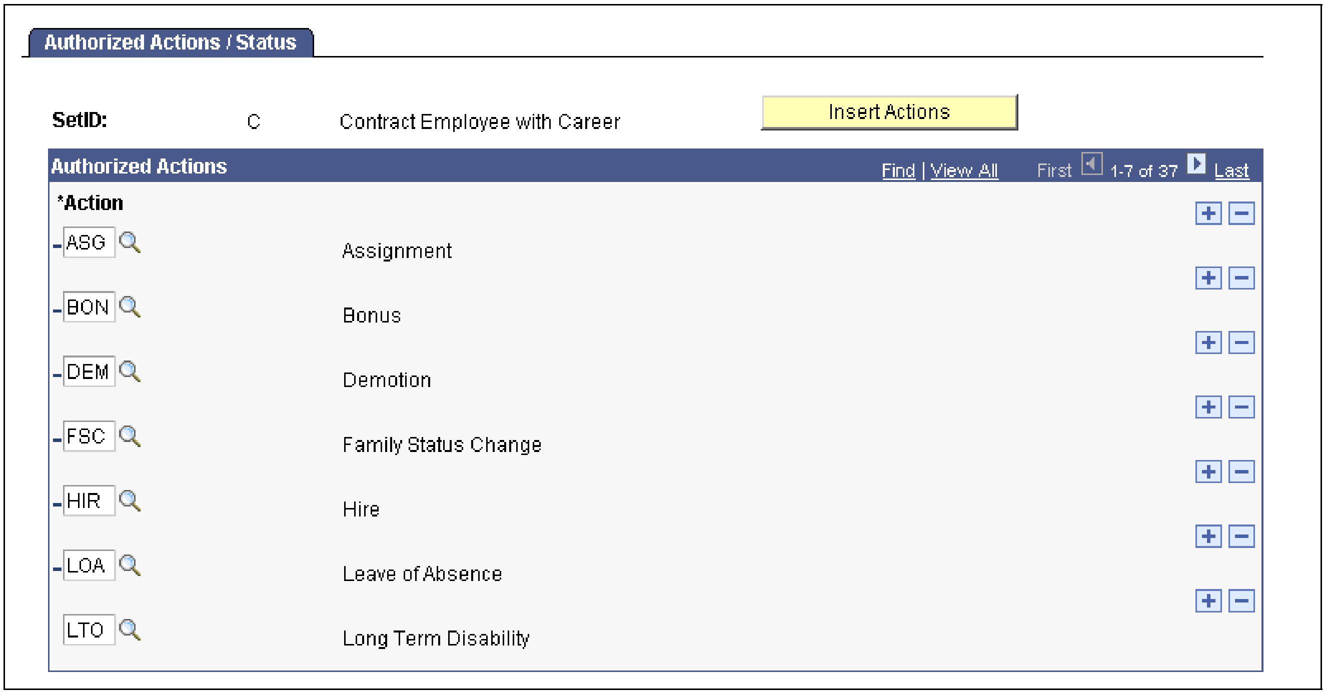
Civil Service Position Code Select a code if the action implies a civil service position change.

Secondment Position Indicates whether the civil service position is a secondment position, based on the information entered on the Civil Service Position Dtls page for the code.

Edit Individual Order and **Edit Collective Order**	Select to edit Crystal reports for the action. Up to five reports per status and action can be defined on the Document/Employee Status page. See Chapter 3, "Setting Up French Public Sector Tables," Selecting Documents to Print, page 24.
Civil Service Positn Data Auth (civil service position data authorization), **Assignment Data Authorized, Career Data Authorized, Compensation Dta Authorized** (compensation data authorized), **Premium Data Authorized, Bonus Data Authorized, Working Time Data Auth.** (working time data authorized), **EE Categorization Authorized** (employee categorization authorized), **Absence Data Authorized,** and **Personal Data Authorized**	Select each type of employee data that is affected by the action. By selecting and clearing these check boxes, you restrict the action codes that are available in each FPS component.
Mandatory Expect Dt of Return (mandatory expected date of return)	Select to require an expected return date for some interruption actions.
Previous Instance Sen Carry Ov (previous instance seniority management carryover)	Select to have the action carry over Previous Instance Seniority on a same step. Available only if you select Career Data Authorized.
Sanction Action, Demotion Action, Action Hire/Rehire, and **Action Terminate Record**	Select if this type of action is available for the selected action. Sanction Action and Demotion Action are available only if you select Career Data Authorized.
Code Action to Create in JOB	Select to create a new data row in JOB with the selected action code. The system creates a row in JOB for all actions with the merge process. If you want to create new rows for selected action codes only, then you must modify the system to make use of this check box.
Grade/Step, Step, and **None**	Select the option that indicates what the action enables you to modify. Available only if you select Career Data Authorized.
Action Group	Enter the action group to which you want to assign the action. Use these action groups to grant data permission security according to user role. This field is available only if you have selected Action Authorization Management in the FPS Installation Parameters component. See Chapter 3, "Setting Up French Public Sector Tables," Modifying Installation Parameters, page 26.

Authorizing Actions by Employee Status

Access the Authorized Actions/Status page.



Authorized Actions/Status page

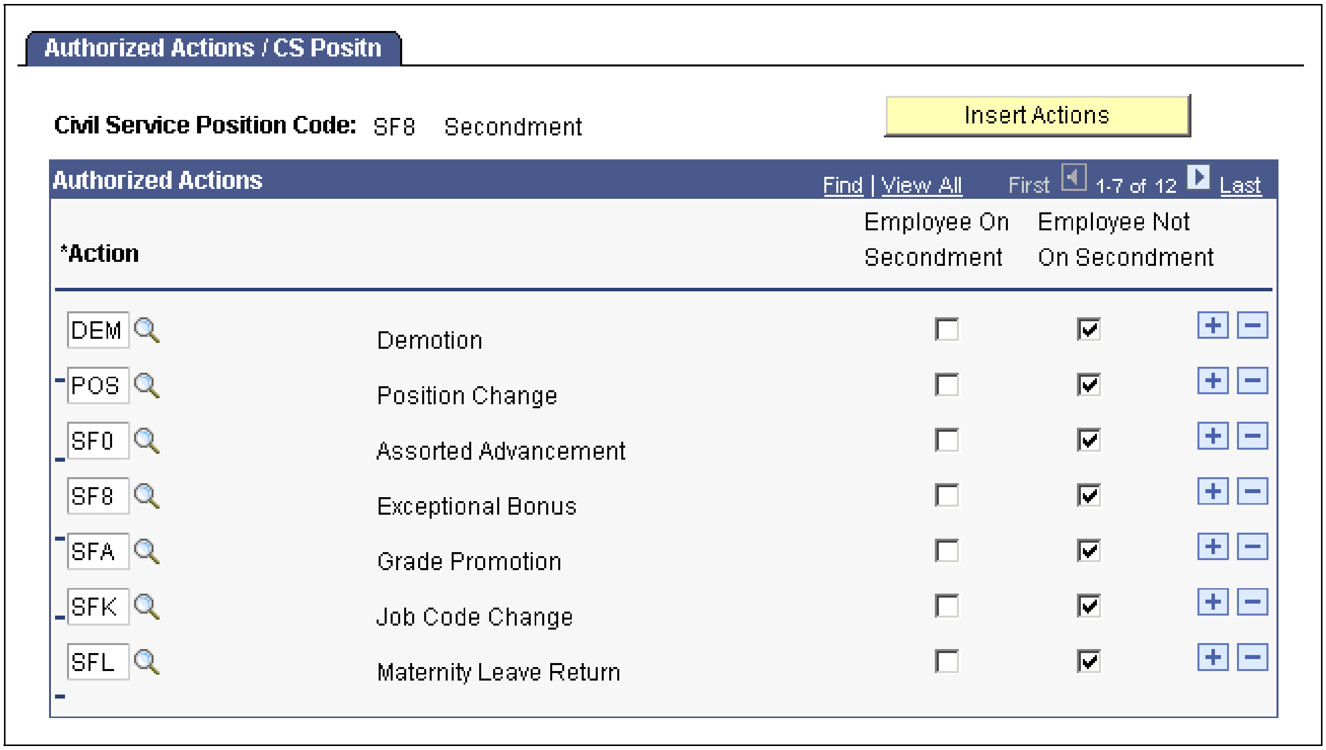
To associate a specific employee status/population code with authorized actions:

1. Enter a setID.

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

Authorizing Actions by Civil Service Position

Access the Authorized Actions/CS Positn page.



Authorized Actions/CS Position page

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

To associate actions with civil service positions:

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

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

Creating Action Groups

Access the Action Group page.

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

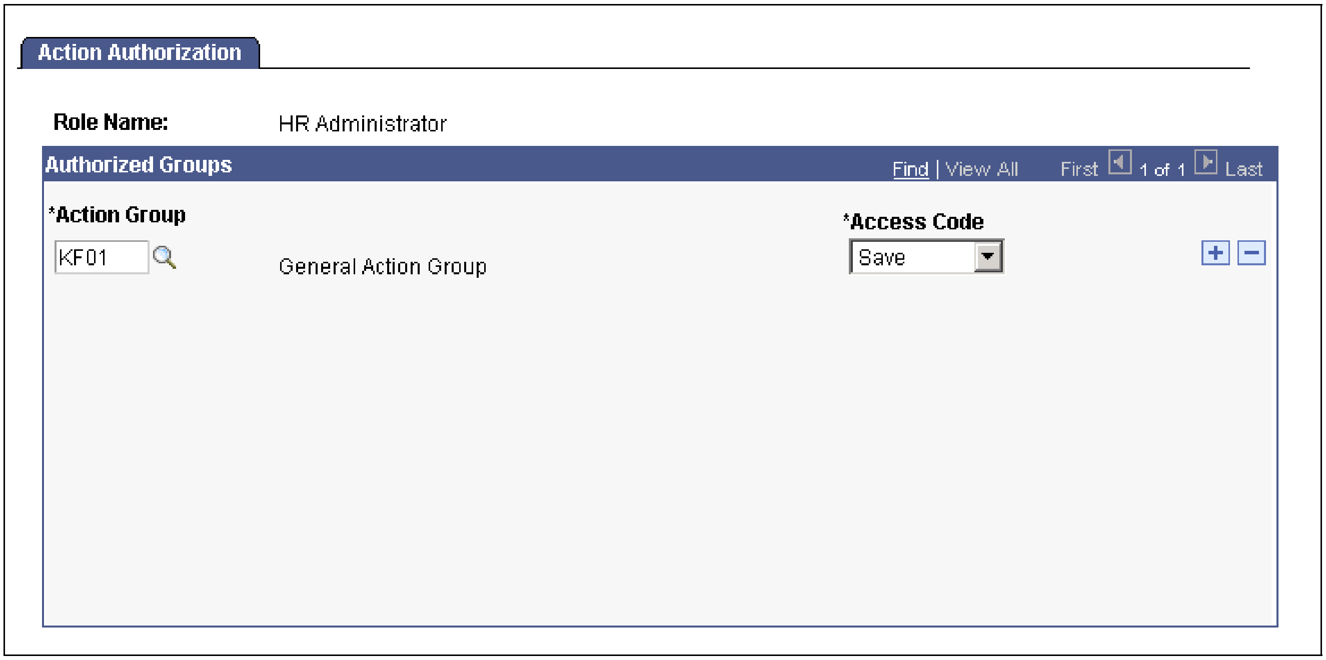
Rather than list restrictions for each individual action, you associate user roles with action groups. The user can access only the actions that are included in the action group.

To create an action group:

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

Defining Authorized Actions by User Role

Access the Action Authorization page.



Action Authorization page

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

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

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

Action Group Enter the action group.

Access Code Values are:

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

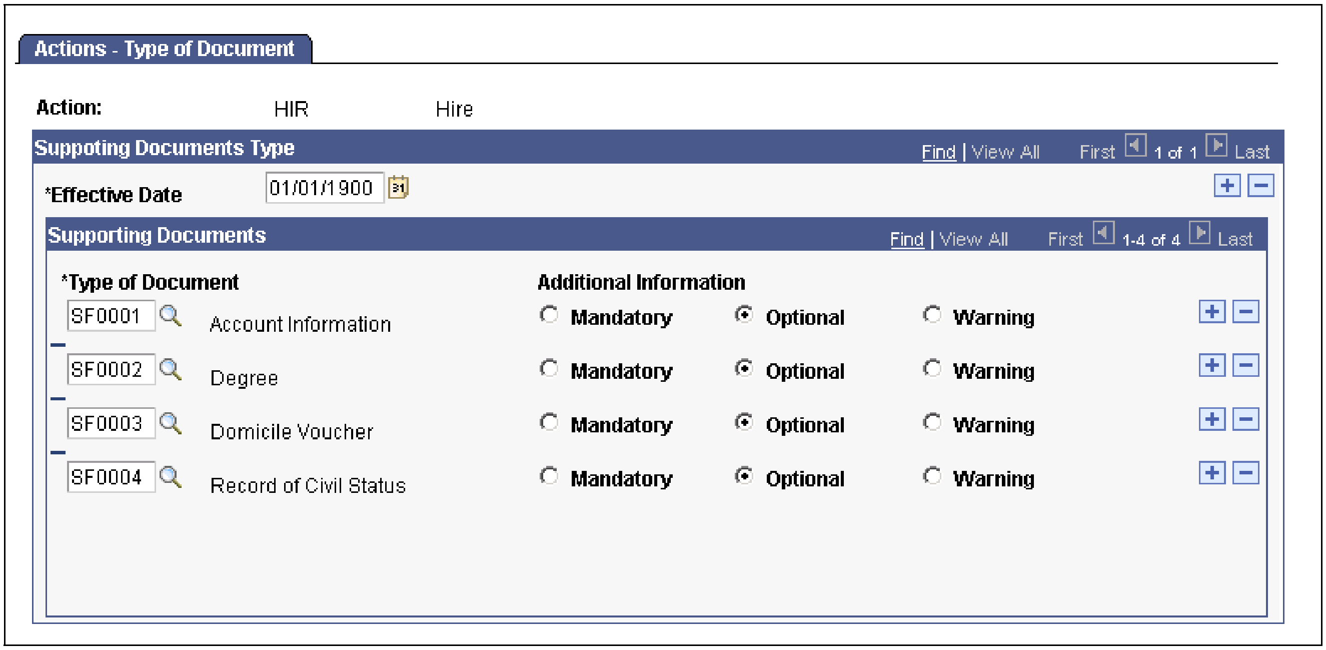
None: The user role is not authorized for this group of actions.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Assigning FPS Components That Can Use the Action, page 17

Listing Supporting Documents

Access the Actions - Type of Document page.



Actions - Type of Document page

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

To associate a document with an action:

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

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

You can associate multiple documents with an action.

Setting Up Retroactivity Rules

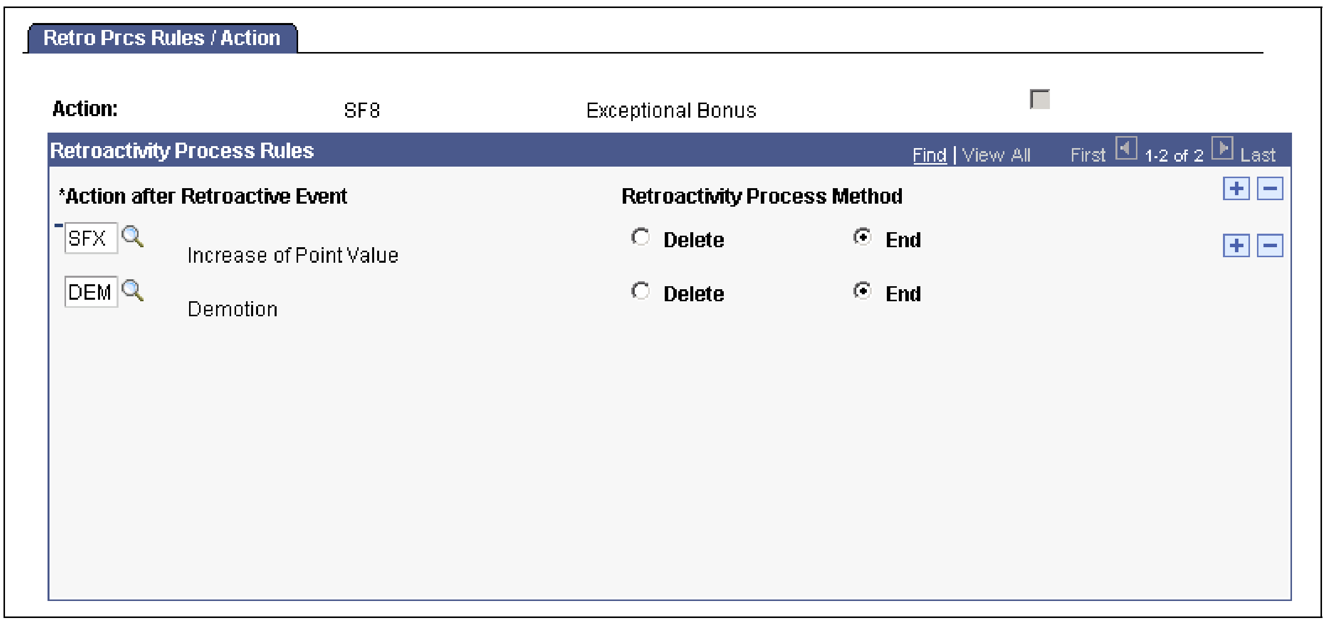
To set up retroactivity rules, use the Retro Prcs Rules/Action component (FPMACTPRTY_PNL) and the Retro Prcs Action Rules component (RUN_FPMACTPR). This section discusses how to set up retroactive process rules and actions.

Pages Used to Set Up Retroactivity Rules

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

Setting Up Retroactive Process Rules and Actions

Access the Retro Prcs Rules/Action page.



Retro Prcs Rules/Action page

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

Action The action that is inserted or deleted in the employee record that generates retroactivity.

Action after Retroactive Event Enter the action that is encountered in Career data with an effective date that is greater than the effective date of the retroactive event.

Retroactivity Process Method Define the retroactive process method for each action:

Delete: The process deletes events of this type that occur after the retroactive event before the career reconstitution. These are principally step increment or reclassification actions, which the system can restore.

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

See Chapter 11, “Running the Retroactivity Process,” page 133.

Defining Individual and Collective Orders

To set up individual and collective orders, use these components: Type of Document (FPMDOCTYP_PNL), Document (FPMDOCWORD_PNL), and Documents/Employee Status (FPMSTATACTDOC_PNL). This section provides an overview of individual and collective orders and discusses how to select documents to print.

Understanding Individual and Collective Orders

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

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

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Assigning FPS Components That Can Use the Action, page 17

Pages Used to Define Individual and Collective Orders

Page Name	Object Name	Navigation	Usage
Document	FPMDOCWORD_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Documents	Defines orders and document codes to be printed.
Documents/Employee Status	FPMSTATACTDOC_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Documents/Employee Status	Select the documents to print that notify an employee of an action .

Selecting Documents to Print

Access the Documents/Employee Status page.

Documents/Employee Status page

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

Action

Select the action for which you want to list documents.

Add a new row to define additional actions for the employee status code.

Type of Order

Select the type of order for which to list documents:

Orders: List documents to print when notifying an employee of the action.

Abrogation: List documents to print in case of abrogation.

Return: List documents to print when a civil service position (such as parental leave) implies a return and you are notifying the return action.

Document 1 - 5

List up to five documents that the system should print to notify an employee (of this employee status code) when the action occurs.

You define the code and description of the documents in the Documents component.

Setting Up FPS Installation Parameters

The FPS installation parameters component (FPMSYSTEM_PNL) enables you to define the different parameters that are used by Manage French Public Sector processes, set up default values, and store counters such as request and order numbers.

This section discusses how to:

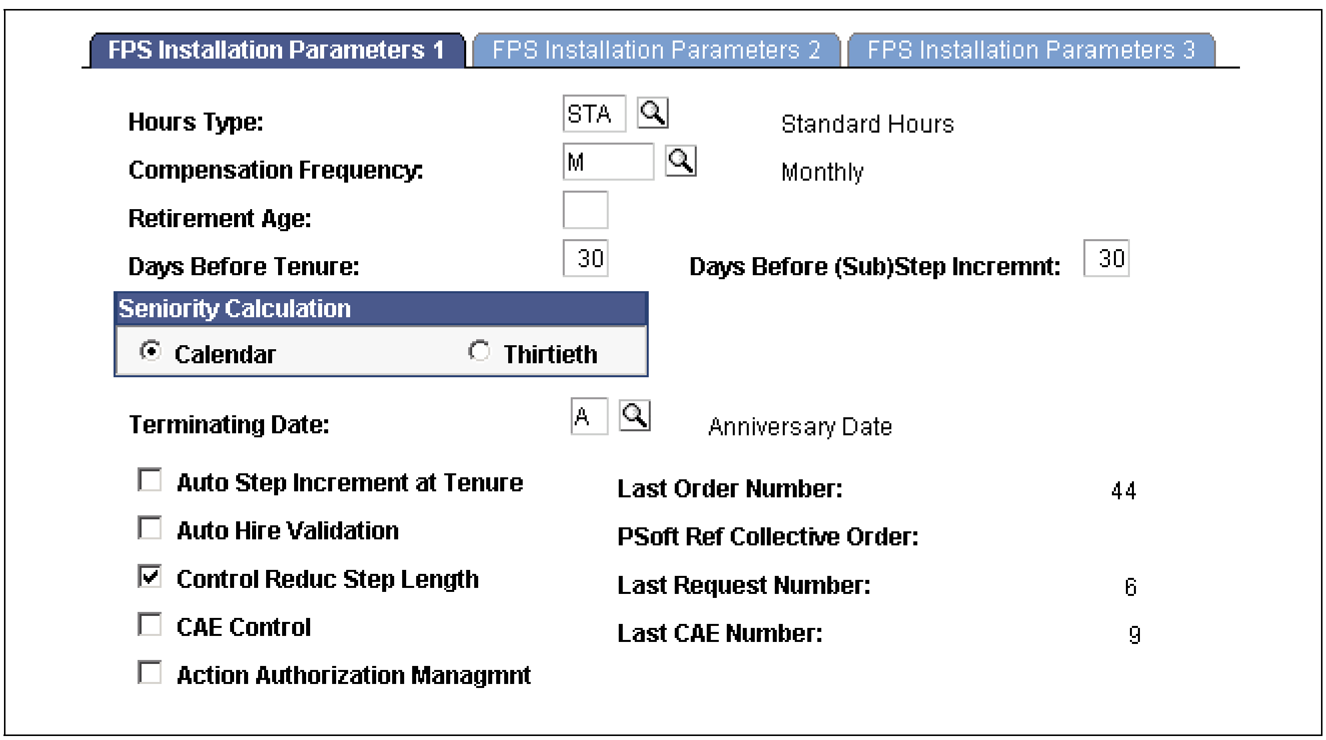
- Modify installation parameters.
- Set the action code and action reason defaults.
- Assign default seniority bonus headings.

Pages Used to Create FPS Installation Parameters

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

Modifying Installation Parameters

Access the FPS Installation Parameters 1 page.



FPS Installation Parameters 1 page

Hours Type	Select the default value for how you track time. This is the schedule that most employees work.
Compensation Frequency	Select the default value for how often you pay employees.
Retirement Age	Enter the default value for the age at which most employees retire. This value is used as the default retirement age when you define a new grade.
Days Before Tenure	Enter the value that is used by the tenure process to search for the next employees to be given tenure. The tenure process selects trainees whose tenure date is earlier than today's date plus the number of days you enter here. The default value is 30 days. For example, if today is June 12 and a trainee's tenure date is July 1, if the number of days is: • *30,* the process selects the employee for tenure validation. • *15,* the process does not select the employee. This same value is used to validate promotion probation periods. You cannot validate the probation period before the probation period end date.
Days Before (Sub)Step Incremnt (days before substep or step increment)	The system uses this value to search for employees due for step or substep increments. The system selects trainees whose advancement date is earlier than the processing date plus the number of days you enter here. You can select between 1 and 99 days before tenure. For example, if the processing date is June 12 and a employee's advancement date is July 1, if the number of days is: • *30,* the process selects the employee for step or substep increment. • *15,* the process does not select the employee.
Calendar and **Thirtieth**	Select a calendar basis or a Thirtieth basis (30 days a month). Applies to all date calculations in the tenure, seniority, and advancement processes.
Terminating Date	Select the date that determines when an advancement takes effect. Values are: *A:* At the anniversary date. *B:* At the beginning of the month. *E:* At the beginning of next month.
Auto Step Increment at Tenure	Select to have Auto Step Increment at Tenure selected by default when defining a new grade.
Auto Hire Validation	Select to have Auto Hire Validation selected by default when defining a new job code.
Control Reduc Step Length (control reduction step length)	Select to have Control Reduc Step Length selected by default when defining a new corps.
CAE Control (commitment accounting entity control)	Select to set up a firm CAE management. This option gives the budget process supervisors a tool to monitor how the budget is managed.
Action Authorization Management	This is a system-wide option. It is applied to FPS workforce administration and enables you to restrict the authorized action list depending on the role.

Last Order Number This value is updated and stored in the system parameters when a recorded action can be notified by an order.

PSoft Ref Collective Order (PeopleSoft reference collective order) This value is updated and stored in the system when a collective order is edited.

Last Request Number This value is updated and stored in the system parameters when a request is recorded in the employee record.

Last CAE Number This value is updated and stored in the system parameters when a new CAEC is created. The system updates this number only when the CAE Control field is selected.

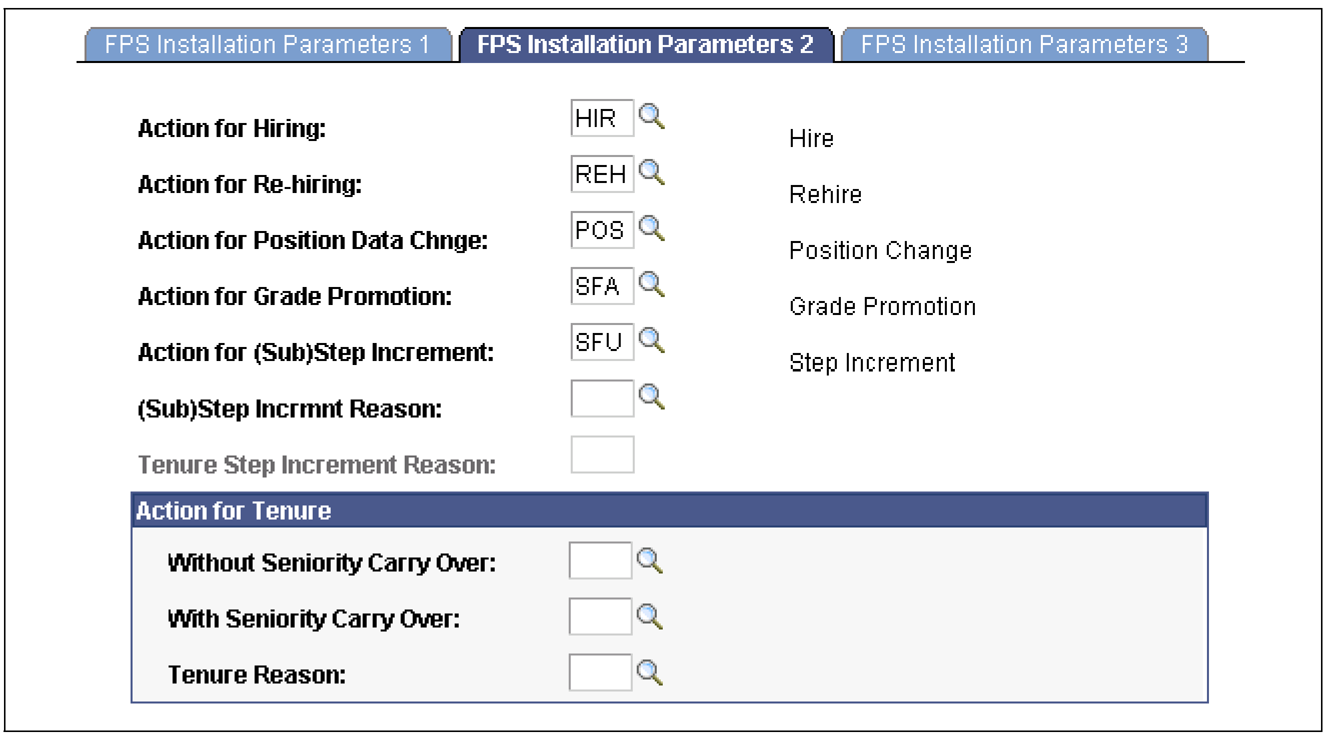
See Also

Chapter 17, “Managing Headcount,” Managing CAE, page 176

Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Actions, page 14

Setting the Action Code and Reason Defaults

Access the FPS Installation Parameters 2 page.



FPS Installation Parameters 2 page

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

Action for Hiring Select an action code to use as the default in the Initialize Status FPS and Employee Record FPS components.

Action for Re-hiring Select an action code to use as the default when rehiring employees.

Action for Position Data Change
Select an action code to use as the default when updating FPS incumbent records when position data is modified.

Action for Grade Promotion
Select an action code to use as the default for grade promotion.

Action for (Sub)Step Increment
Select an action code to use as the default for step increment.

(Sub)Step Incrmnt Reason
Select an action code to use as the default for step increments.

Tenure Step Increment Reason
Enter the reason for the step increment done at tenure. This field is available when you select the Auto Step Increment at Tenure check box on the FPS Installation Parameters 1 page.

Action for Tenure

Defines the action code reserved for tenure.

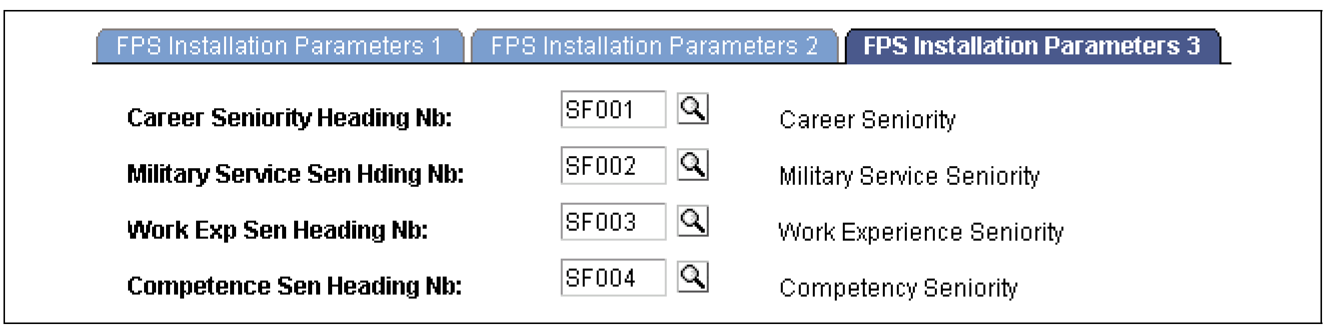
Without Seniority Carry Over
Select when tenure is associated with step increment without seniority carry over.

With Seniority Carry Over
Select when tenure does not imply step increment with seniority carry over. Automatic step increment at tenure is linked to Grade Definition. The code is initialized by the value entered.

Tenure Reason
Select the reason code to use as a default for tenure.

Assigning Default Seniority Bonus Headings

Access the FPS Installation Parameters 3 page.



FPS Installation Parameters 3 page

Career Seniority Heading Nb (career seniority heading number)
Enter the seniority bonus heading for seniority obtained in another organization.

Military Service Sen Hding Nb (military service seniority heading number)
Enter the seniority bonus heading for seniority obtained during military service.

Work Exp Sen Heading Nb (work experience seniority heading number)
Enter the seniority bonus heading for the equivalent of a work experience outside the public sector.

Competence Sen Heading Nb (competence seniority heading number) — Enter the seniority bonus heading for the equivalent of specific competencies.

Modifying the Correspondence Between Gross and Increased Indexes

Increased indexes enable you to calculate the employee's base compensation. Several gross indexes can correspond to one increased index. Gross indexes cannot be modified. To modify the correspondence between gross and increased indexes, use the Gross/Increased Index component (FPMGROSSIND_PNL).

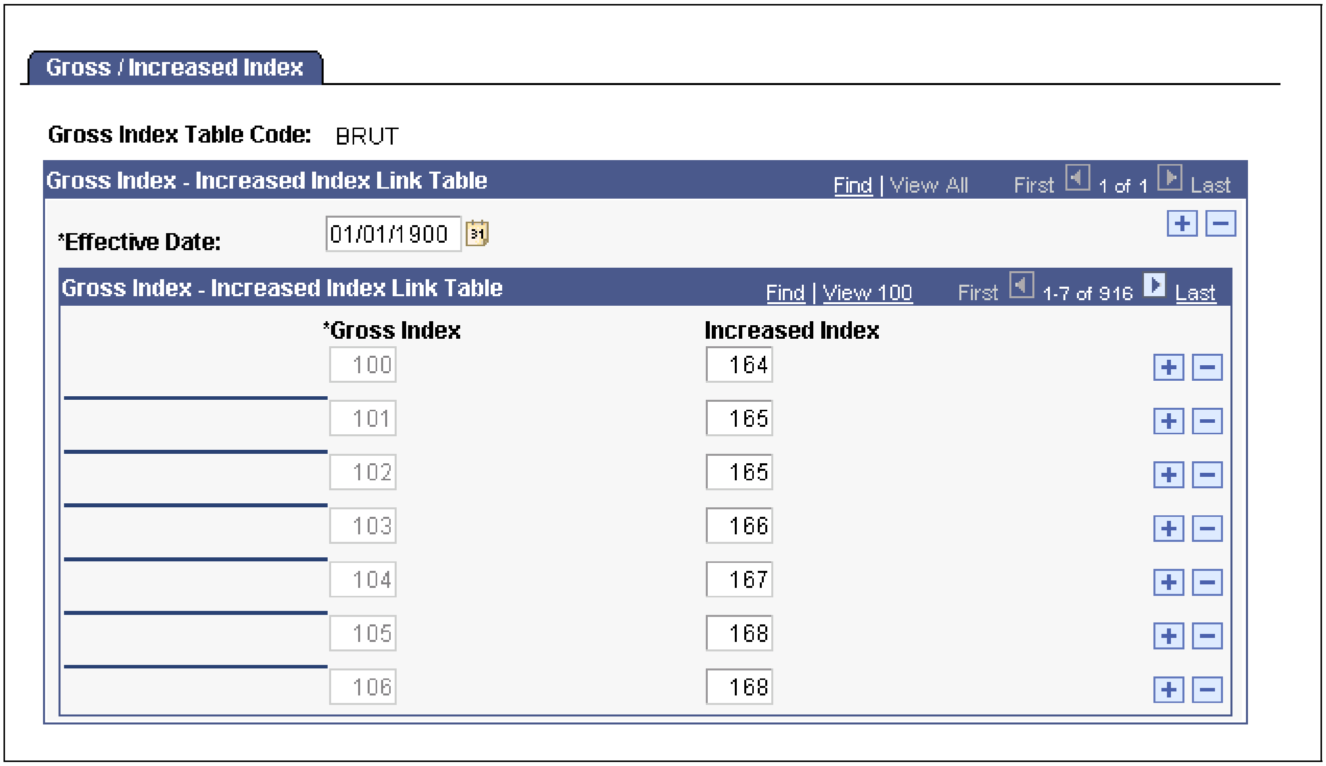
This section discusses how to modify the correspondence between gross and increased indexes.

Page Used to Modify the Correspondence Between Gross and Increased Indexes

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

Modifying the Correspondence Between Gross and Increased Indexes

Access the Gross/Increased Index page.



Gross/Increased Index page

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

Defining Types of Points

To define type of points, use the Types of Points component (FPMPOINTYP_PNL). This section provides an overview of points and discusses how to:

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

Understanding Points

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

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

- Those that set up compensation grids with references.

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

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

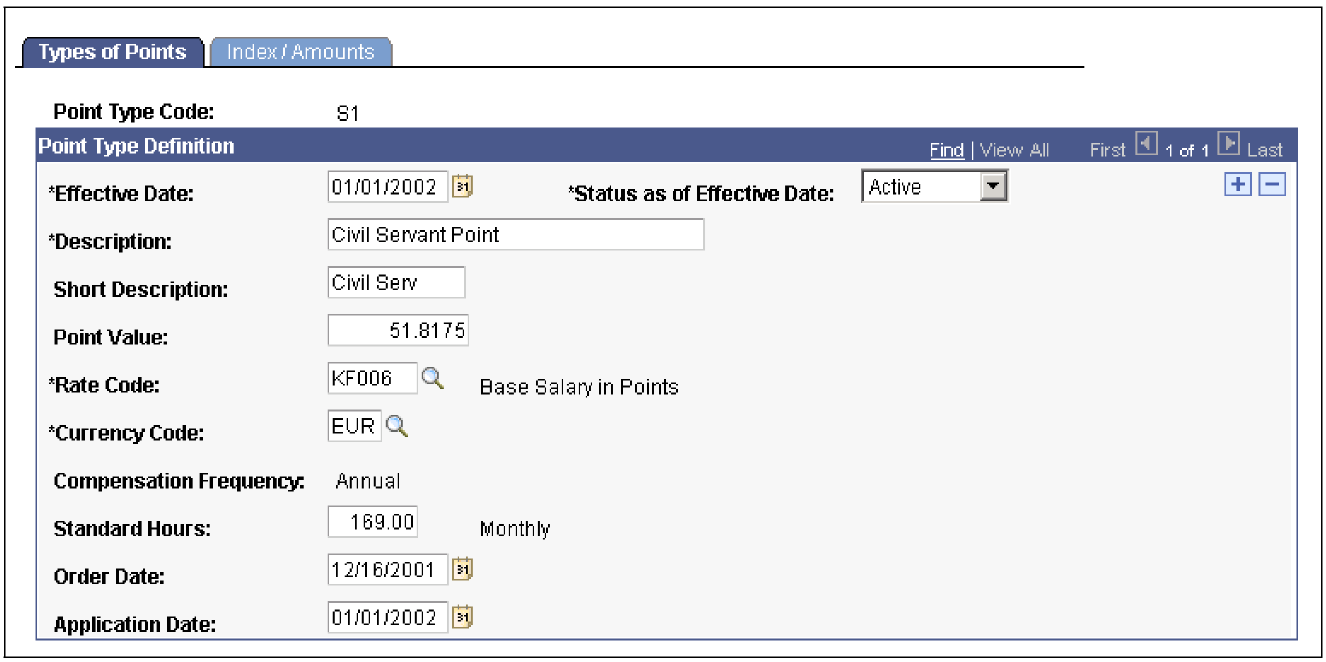
  This is the general type of point.

Pages Used to Define Types of Points

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

Adding or Changing Point Types

Access the Types of Points page.



Types of Points page

Point Type Code

Displays the point type code. Codes prefixed with an X are those that set up compensation grids with references. Codes without this prefix are general types of points.

Point Value

Enter a point value for a general type of point. This field is not for points with the X prefix.

Rate Code

Select a rate code value to calculate the compensation amounts.

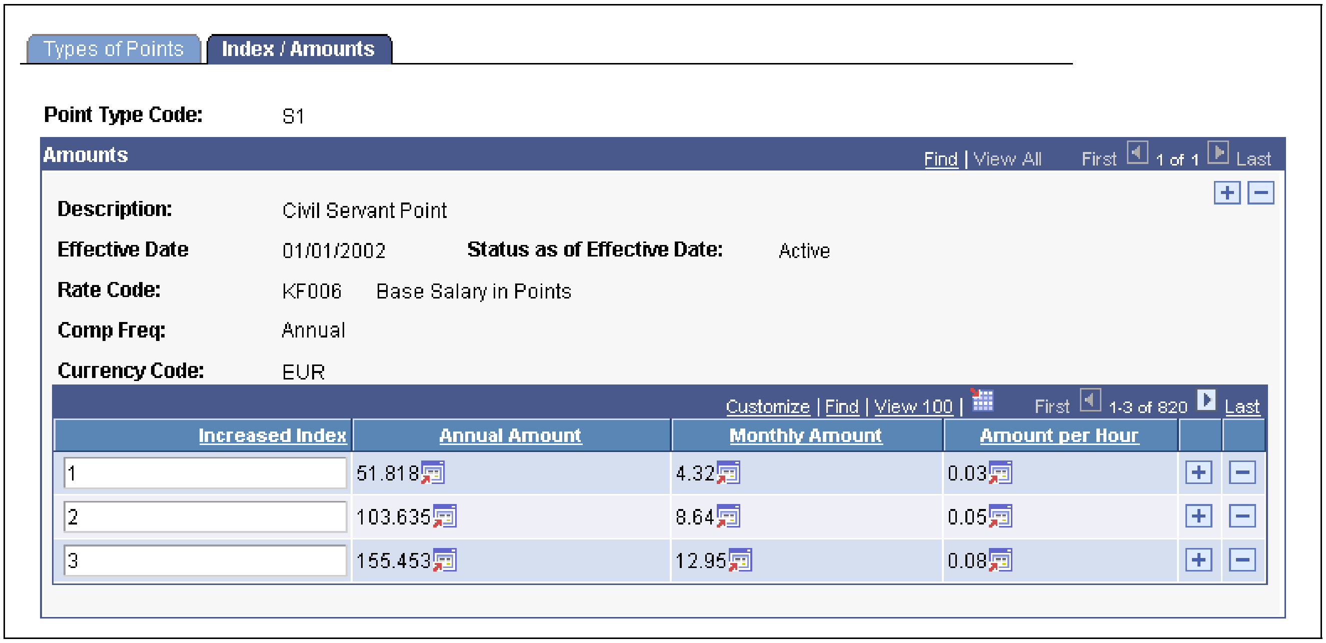
If it is a general type of point, the system displays only points rate codes (instead of flat amount rate codes) with an annual frequency.

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

Standard Hours Enter a standard hours value to calculate the compensation amounts.

Setting Up the Relationship Between the Reference and the Amount

Access the Index/Amounts page.



Index/Amounts page

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

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

To set up the reference grid:

- Select an annual amount, a monthly amount, and/or an amount per hour according to the frequency that is defined for the rate code.
- For each amount, you can obtain a correspondence in another currency either by triangulation or by direct calculation.

  Click the Display in Other Currency button for direct calculation.
- The unavailable amounts are automatically calculated.

  The amounts are calculated for the frequencies that are delivered by PeopleSoft (hourly, monthly, annual) and according to standard hours.

Setting Up Salary Scales

To define salary scales, use the Salary Scales component (FPMSCALE_PNL). This section provides an overview of salary scales and discusses how to set up salary scales.

Understanding Salary Scales

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

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

See Also

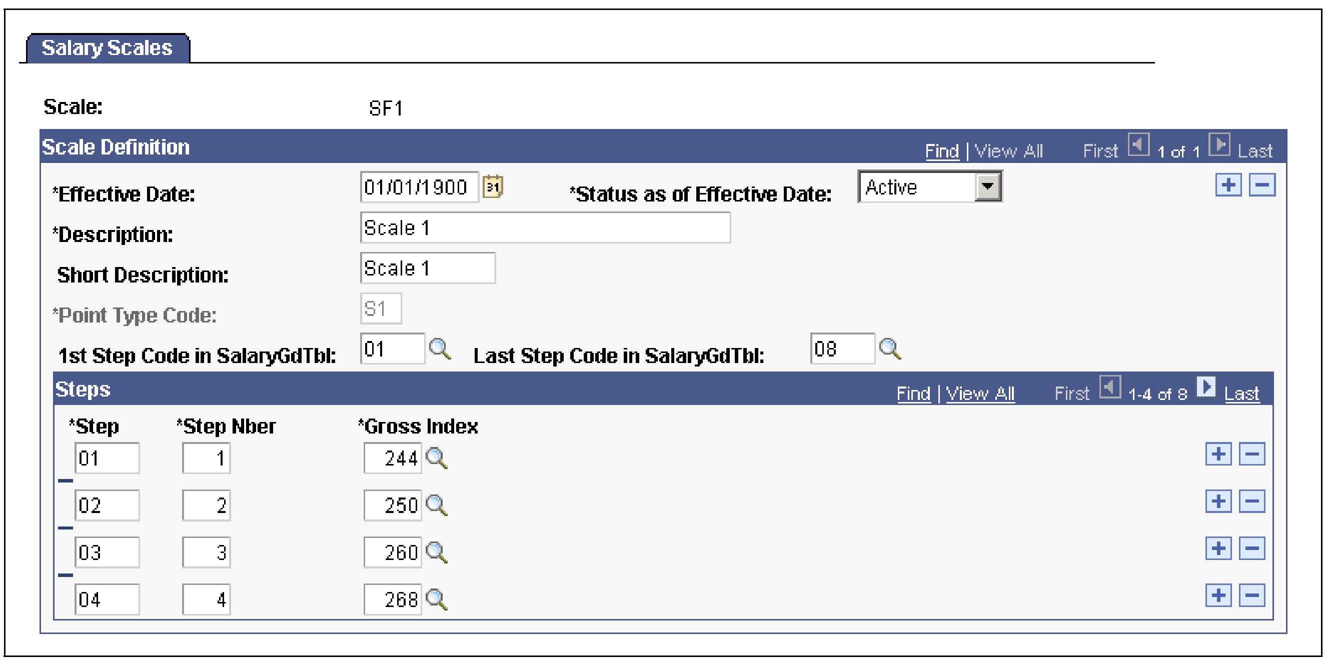
Chapter 3, "Setting Up French Public Sector Tables," Setting Up Salary Grades, page 35

Page Used to Set Up Salary Scales

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

Setting Up Salary Scales

Access the Salary Scales page.



Salary Scales page

To set up salary scales:

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

   Once you have selected a point type, you cannot modify it.
3. Enter the step, step number and gross index that are associated with the scale.

   The system uses the Step Nber (step number) fields to determine the first and last steps in the scale.
4. Click the Add button to create additional values.
5. Save the page.

Setting Up Salary Grades

To set up salary grades, use the Application Sector component (FPMAPPLAREA_PNL), Salary Grade Types component (FPMMATXTYP_PNL) and the Salary Grade Tables component (FPMSALMATRX_PNL). This section provides an overview of salary grades and discusses how to define the salary grades.

Understanding Salary Grades

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

- Gross index and increased index.

  When entering the gross index, the system retrieves the corresponding increased index.
- Annual compensation value for substep.
- Increased index.
- Reference (when the type of point is prefixed by X).

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

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

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

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

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

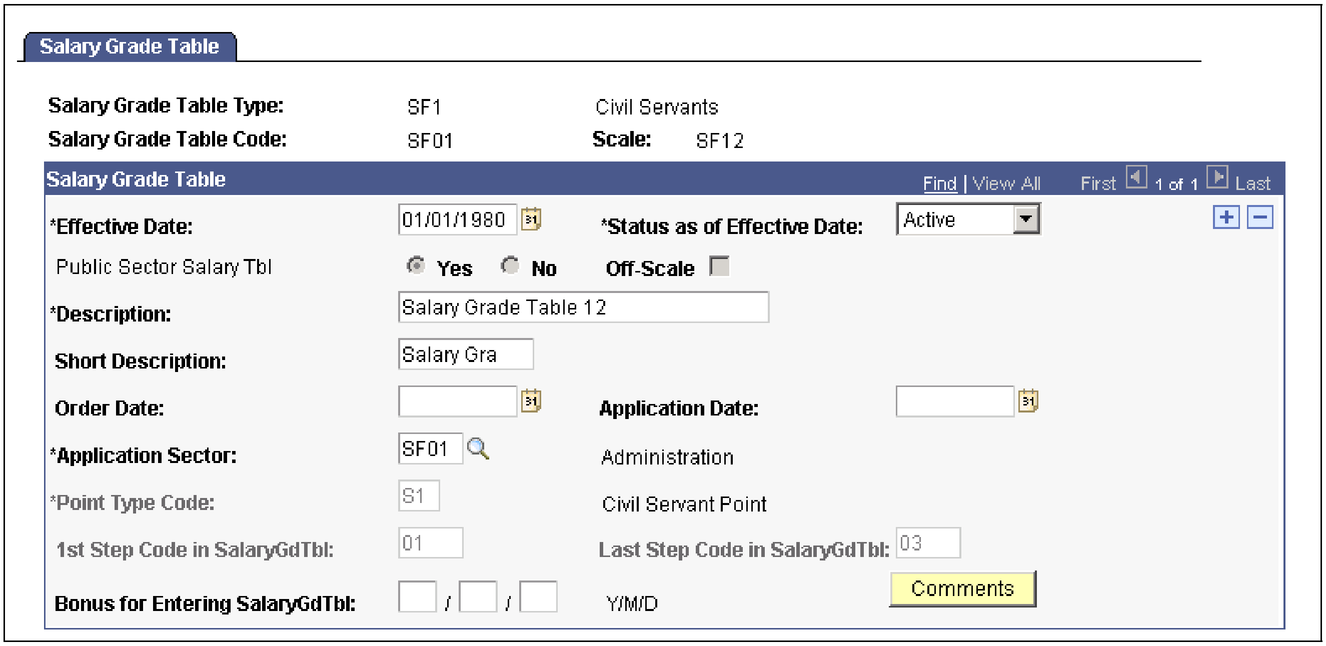
Type of Point	Salary Grade Table	Step
Standard Type of Point	Public	Gross Index
Type of Point X	Non-Public	Reference
Standard Type of Point	Non-Public	Increased Index

Pages Used to Set Up Salary Grades

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

Defining the Salary Grade Table

Access the Salary Grade Table page.



Salary Grade Table page

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

Public Sector Salary Tbl (public sector salary table)	Select if the salary grade table is for the public sector. Once you save this page, you cannot modify this field.
Off-Scale	Select if the salary grade table is off-scale. If you do not select this check box, the salary grade table is composed of steps. Otherwise, it can be composed of substeps. Once you save this page, you cannot modify this field.
Order Date	Enter the issue date of the government order or decree that defines the salary grade table.
Application Sector	Select the application sector for the salary grade table.
Application Date	Enter the date that the salary grade table becomes active; this date should usually be equal to the effective date.
Point Type Code	Displays a value if you have selected a scale. Otherwise, enter a value. Once you save this page, you cannot modify this field.
1st Step Code in SalaryGdTbl (first step code in salary grade table) and **Last Step Code in SalaryGdTbl** (last step code in salary grade table)	Displays a value if you have selected a scale. The value is updated when you save the Steps - Advancement Rules page.
Bonus for Entering SalaryGdTbl (bonus for entering salary grade table)	Enter the value in years/months/days.
Comments	Click to enter or view comments about the salary grade table.

Defining Steps, Substeps, and Advancement Rules

To define steps, use the Salary Grade Steps component (FPMSALSTEP_PNL). This section provides an overview of steps, substeps, and advancement rules and discusses how to define salary grade table steps and substeps and advancement rules.

Understanding Steps, Substeps, and Advancement Rules

After establishing salary grade tables, you need to:

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

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

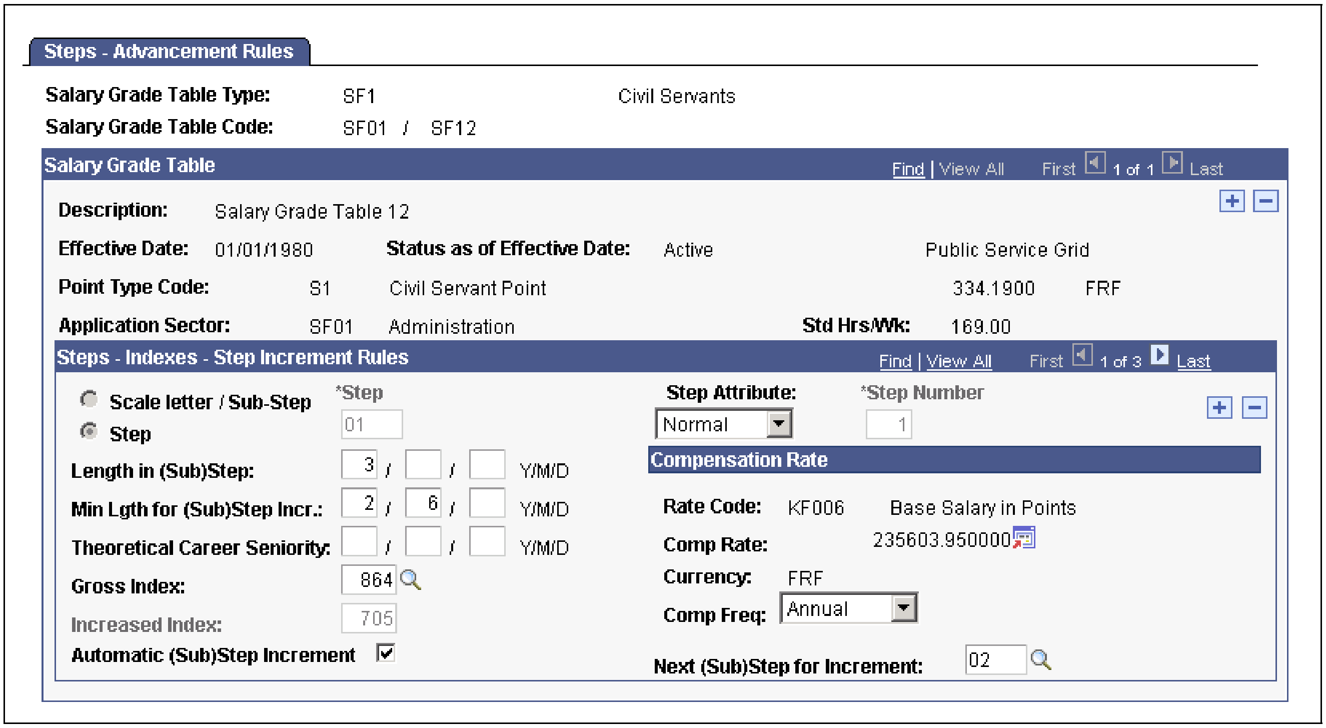
  A single scale can be associated with several salary grade tables with different advancement rules.

Page Used to Define Steps, Substeps, and Advancement Rules

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

Defining Salary Grade Table Steps, Substeps, and Advancement Rules

Access the Steps - Advancement Rules page.



Steps - Advancement Rules page

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

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

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

The fields displayed on the page vary depending on whether you select Scale letter/Sub-Step or Step.

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

Step Select if the salary grade table is not off-scale and therefore it is composed of steps only.

Step or **Substep** Enter the step or substep code.

Step Attribute Select a step attribute. Values are *Normal, Temporary* and *Exceptional.*

Step Number Enter the step number that indicates the rank of the step in the salary grade table.

Length in (Sub)Step Enter the average duration in step or substep, in years, months, and days. Employees cannot be granted substep length reductions. However, they can be granted length reductions in the step that corresponds to the scale letter.

Min Lgth for (Sub)Step Incr (minimum length for step or substep increment)
Enter the minimum length of time that an employee must stay in a step or substep before the system applies a seniority bonus.

Theoretical Career Seniority
Enter the theoretical career seniority. The theoretical career seniority (or salary grade table seniority) calculates the seniority in grade (or in salary grade table) of an employee:

1. Who entered the grade with zero seniority.
2. Whose civil service position has been constantly active.
3. Whose step increments have been processed based on the average statutory length.

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

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

Gross Index
Select the index for a step. This field is not available if you selected Scale Letter/Sub-Step.

Increased Index
Define for a step. This field is not available if you selected Scale Letter/Sub-Step.

Equiv. Incrs Index (equivalent increased index)
Displays the index for the scale letter/sub-step. This field is not displayed if you select a step.

Annual Compensation Value
Enter the annual compensation amount. This field is displayed only if you select Scale Letter/Sub-Step.

Automatic (Sub)Step Increment and **Next (Sub)Step for Increment**
Select to indicate employees can automatically move to the next step or substep. If you select the check box, you must enter the next step or substep.

Compensation Rate

This group box is displayed only if you select a Step. It is not displayed for Scale Letter/Sub-Step.

Rate
Displays the rate code that is associated with the salary grade table type of point.

Comp Rate (compensation rate)
Displays the annual amount in the currency that is associated with the rate code.

Comp Freq (compensation frequency)
You can modify the frequency and view the corresponding compensation. This functionality is for reference only: the modifications are not recorded by the system.

Defining Corps

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

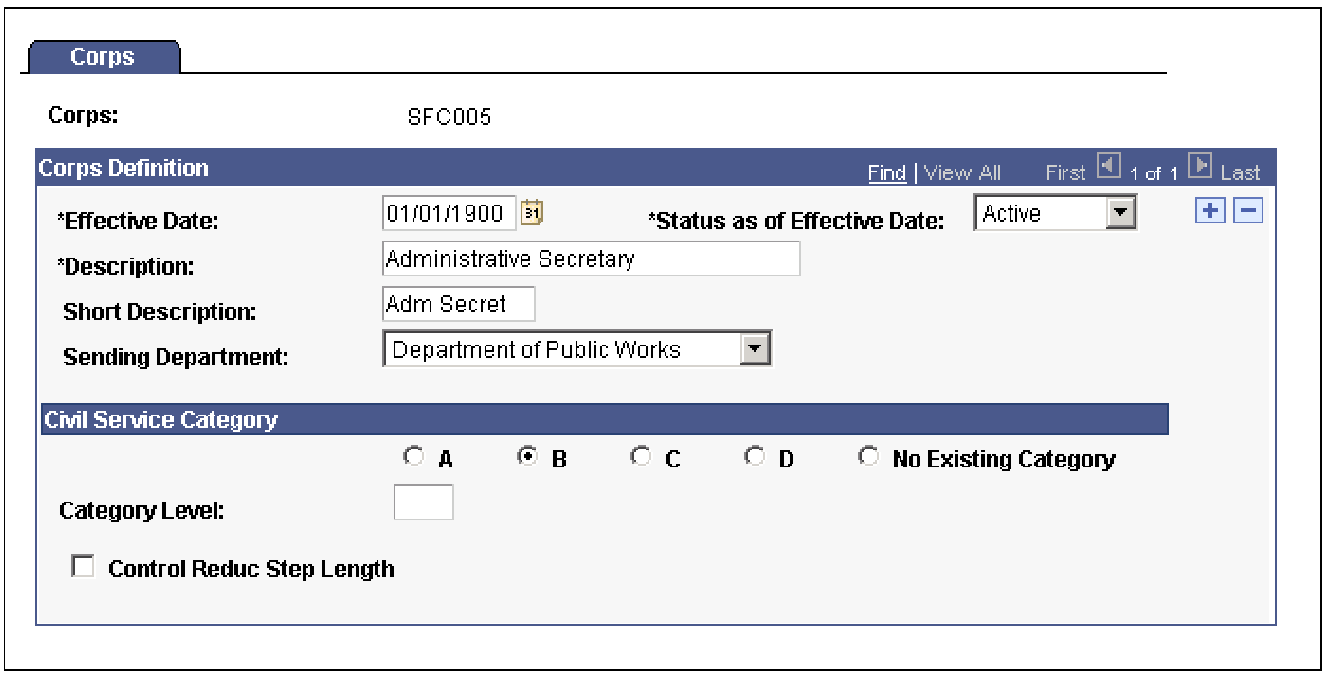
This section discusses how to add and change corps.

Page Used to Define Corps

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

Adding and Changing Corps

Access the Corps page.



Corps page

To add or change corps:

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

Setting Up Grades

To set up grades, use the Grade Groups component (FPMRANKGRP_PNL) and Grades components (FPMRANK_PNL). This section provides an overview of grades and grade groups and discusses how to:

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

Understanding Grades and Grade Groups

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

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

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

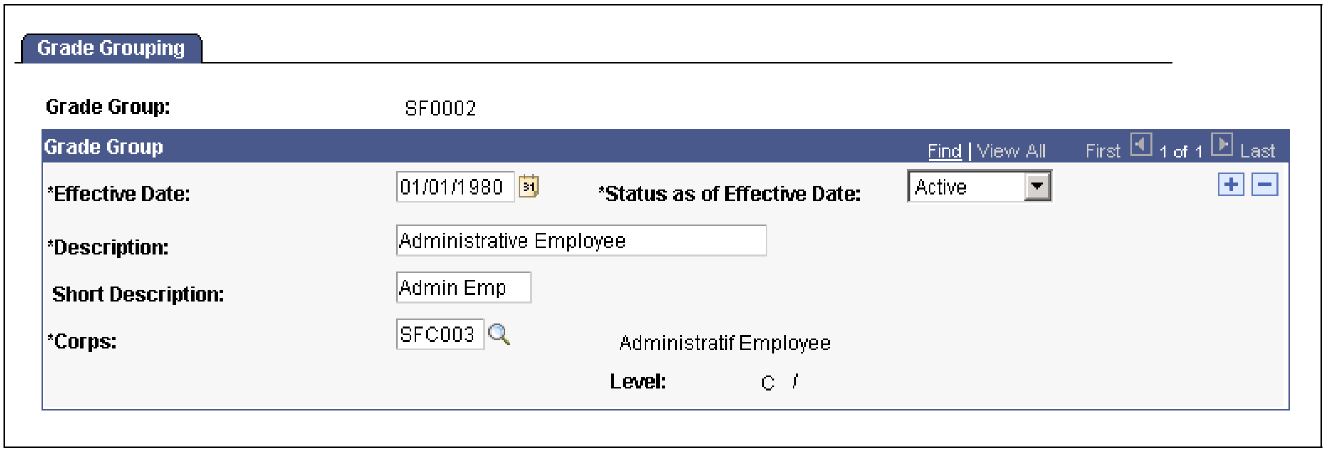
A grade group is a concept that falls halfway between grades and corps that is used in Territorial and Hospital Public Sectors. It enables you to group grades depending on one corps. One example of how you might use grade groups is to promote employees who belong to this group.

Pages Used to Set Up Grades

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

Grouping Grades within a Corps

Access the Grade Grouping page.

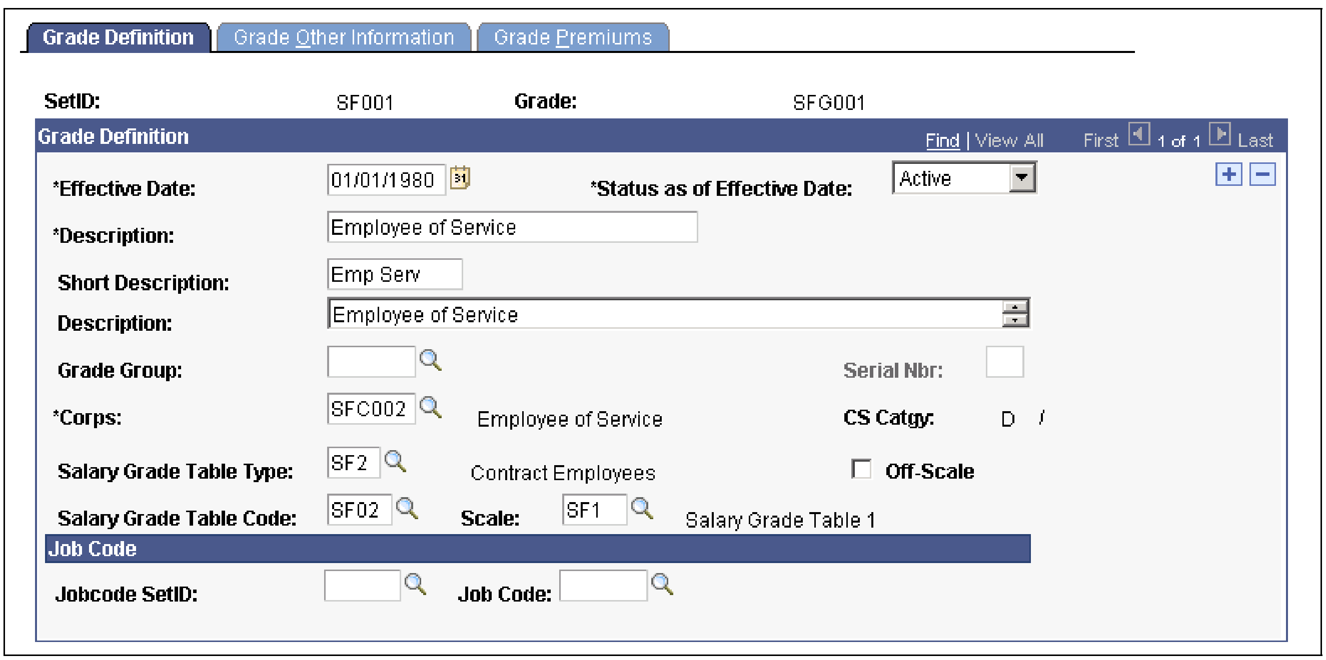


Grade Grouping page

Corps Select the corps that is associated with the grade group.

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

Access the Grade Definition page.



Grade Definition page

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

Corps Select the corps associated with this grade.

See Chapter 3, "Setting Up French Public Sector Tables," Defining Corps, page 41.

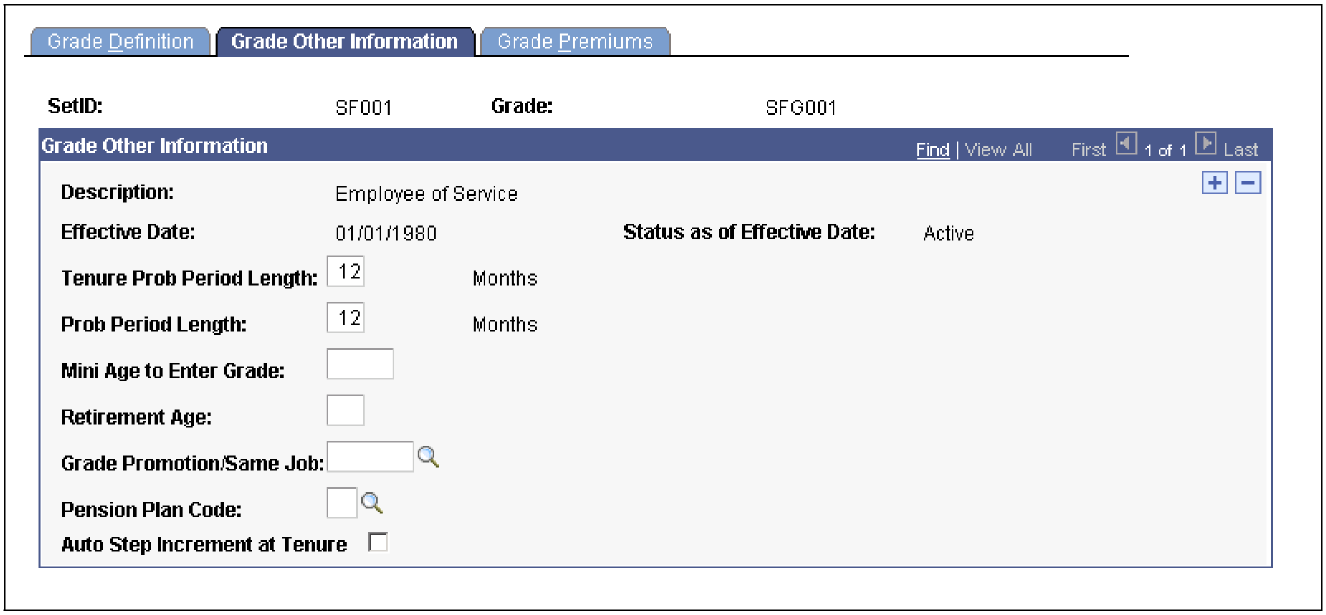
Salary Grade Table Code Select the salary grade table for the grade. Employees are assigned successive steps of the salary grade table that is associated with their grade.

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

Job Code Enter the grade’s default job code.

Entering Period Lengths, Retirement Age, and Pension Plan Code

Access the Grade Other Information page.



Grade Other Information page

Tenure Prob Period Length (tenure probation period length) Enter the length of the probation period when the employee enters the organization.

Prob Period Length Enter the length of the probation period for grade promotions.

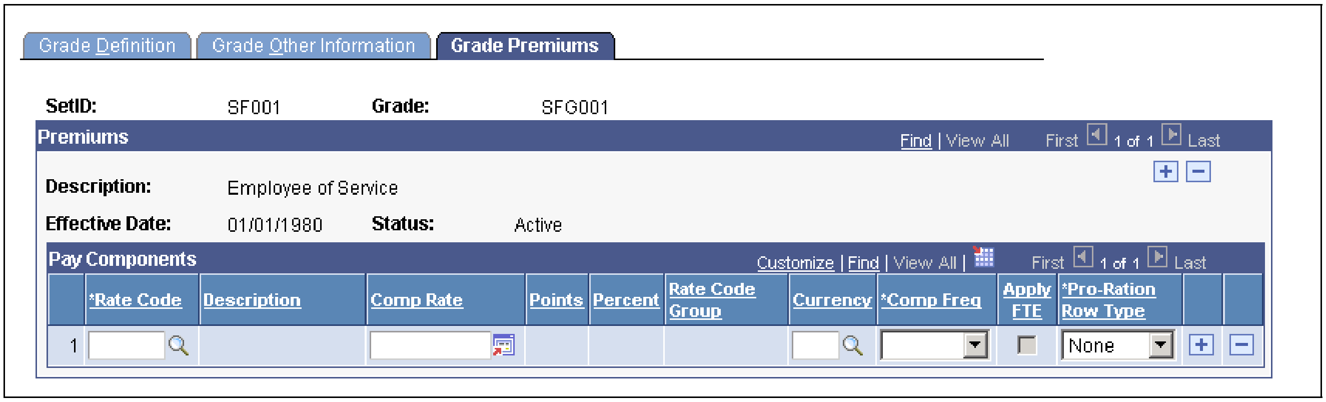
Mini Age to Enter Grade (minimum age to enter grade) Enter the minimum age required to enter the grade.

Grade Promotion/Same Job Enter the grade for automatic grade promotion. Informational only.

Auto Step Increment at Tenure Select if an automatic step increment should occur when tenure is validated.

Attaching Collective Premiums to a Grade

Access the Grade Premiums page.



Grade Premiums page

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

Rate Code

Enter the rate code associated with the premium. Depending on the rate code type (flat amount, percentage, or points), you can enter a compensation rate, the number of points, or the percent and the rate code group.

This flexibility enables you to apply a premium to the main salary or to the base salary. To apply a premium to:

- The main salary, use a rate code or define a rate code group that contains the rate code that is related to the indexed salary.
- The base salary, group the rate codes that are related to the indexed salary and the additional compensation items.

Comp Rate (compensation rate) and **Rate Code Group**

If you selected a *Percentage* rate code, the Comp Rate field is unavailable, and the Rate Code Group field is available for entry. Enter the rate code group on which the percentage is going to be applied.

Points

If you selected a *Points* rate code, you can enter the number of points.

Apply FTE

If you selected a rate code other than *Percentage,* this field is selected or not based on the rate code definition.

Pro-Ration Row Type

If Apply FTE is selected, indicates if the premium is considered main or secondary compensation.

See Also

Chapter 16, "Merging French Public Sector and Human Resources Files," page 161

Defining Job Codes and Occupation Codes

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

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

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

In the Manage French Public Sector business process, you can attach collective premiums to a job code. The business rules are similar to the grade premiums business rules. To attach collective premiums to a job code, use the Jobcode Premiums component (FPMJB_RATECODE), and the Occupations component (FPNBUSINESS_PNL).

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

Pages Used to Define Job Code Premiums and Occupation Codes

Page Name	Object Name	Navigation	Usage
Jobcode Premiums	FPMJB_RATECODE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Jobcode Premiums	Attach collective premiums to a job code. The fields on this page are similar to those on the Grade Premiums page.
Occupation	FPNBUSINESS_PNL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Occupations	Define occupation codes.

Setting Up Host Organizations

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

- Type of organization
- Subtype of organization

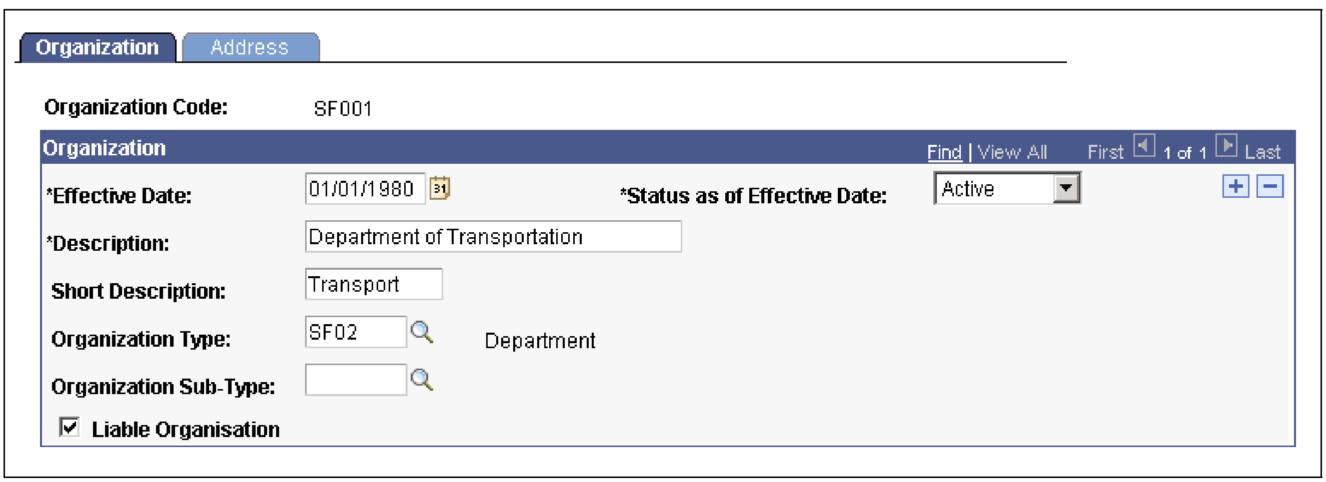
To set up organizations, use these components: Type of Organization (FPMORGTYPE_PNL), Sub-types of Organization (FPMORG_PNL), and Organizations (FPMINDBTORG_PNL). This section discusses how to add or change an organization.

Pages Used to Set Up Host Organizations

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

Adding or Changing an Organization

Access the Organization page.



Organization page

Organization Sub-Type The available values depend on the organization type.

Liable Organisation Select to indicate that the organization is liable for the "employer" civil pension contribution.

Establishing the Employer Contribution Rate

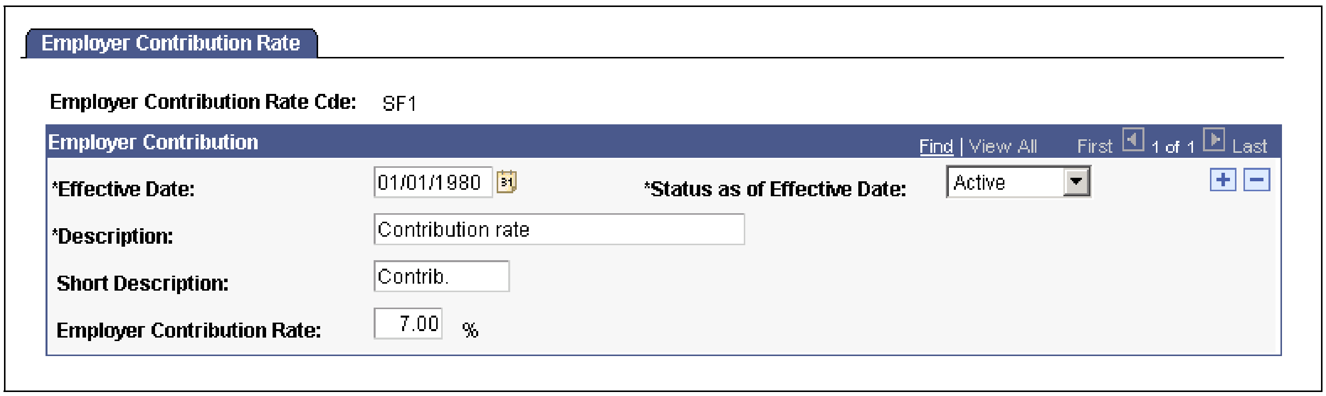
To set up employer contribution rates, use the Employer Contribution Rate component (FPMCNTRB_EMPLY_PNL). This section discusses how to establish the employer contribution rate.

Page Used to Establish the Employer Contribution Rate

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

Establishing the Employer Contribution Rate

Access the Employer Contribution Rate page.



Employer Contribution Rate page

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

See Also

Chapter 15, “Managing Secondment,” Managing Contributions for Employees on External Secondment, page 157

Defining Degree Subject Codes

To define codes for degree subjects, use the Degree Subjects FPS component (FPMSUBJECTS_PNL). This section lists the page used to define FPS degree subject codes.

Page Used to Define Degree Subject Codes

Page Name	Object Name	Navigation	Usage
Subjects	FPMSUBJECTS_PNL	Set Up HRMS, Common Definitions, School Information, Degree Subjects FPS	Define subject for degrees. Degree subject is used to track degree subjects in PeopleSoft Enterprise Human Resources Manage Competencies.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments," Tracking Professional Education and Training

Running Manage French Public Sector Table Reports

This section discusses how to run Manage French Public Sector setup reports.

Pages Used to Run Manage French Public Sector Setup Reports

Page Name	Object Name	Navigation	Usage
Action List — Report 1	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List —Report 1	Run the Action List − Report 1 (FPMACT1) that lists action definition part 1.
Action List — Report 2	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Action List — Report 2	Run the Action List − Report 2 (FPMACT2) that lists action definition part 2.
Actions/CS Position	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/CS Position	Run the Actions/CS Position report (FPMACTLE) that lists actions authorized by civil service position.
Retro Prcs Action Rules	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Retro Prcs Action Rules	Run the Retro Prcs Action Rules report (FPMACTPR) that lists retroactivity rules.
Action Status	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Actions/Status	Run the Actions/Status report (FPMACTST) that lists actions authorized by status.

Page Name	Object Name	Navigation	Usage
Occupation	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Occupation	Run the Occupation report (FPMBUISN) that lists occupation codes.
Corps	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Corps	Run the Corps report (FPMCORPS) that lists corps definitions.
Amount Index	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Index Value	Run the Index Value report (FPMINDEX) that lists index/amount values.
Job Code	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Job Code	Run the Job Code report (FPMJOBCD) that lists job code definitions.
Civil Service Position	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Civil Service Position	Run the Civil Service Position report (FPMLEGAL) that lists civil service position definitions.
Types of Point	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Type of Point	Run the Type of Point report (FPMPOINT) that lists type of point definitions.
Grade List — Report 1	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List — Report 1	Run the Grade List − Report 1 (FPMRANK1) that lists grade definition part 1.
Grade List — Report 2	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Grade List — Report 2	Run the Grade List − Report 2 (FPMRANK2) that lists grade definition part 2.
Sal Grade Table/Scale — Steps	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Workforce Reports FPS, Sal Grade Table/Scale — Steps	Run the Sal Grade Table/Scale-Steps report (FPMSALST) that lists the salary grade table steps.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports”

CHAPTER 4

Hiring French Public Sector Employees

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

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

Understanding the Hiring Process

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

The hiring process is composed of four main steps:

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

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Increasing the Workforce"

Prerequisites

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

Creating an Employee ID

Use the Add a Person component (PERSONAL_DATA) to add a new employee to the system. To create an employee ID, you:

- Assign an employee ID to the employee, manually or automatically.
- Enter the employee's personal details on the Biographical Details page.
- Select the hiring action code on the Regional page.

  The default hiring action code is defined on the FPS Installation Parameters page, but you can select a different code. The action code should have the Personal Data Authorized check box selected on the FPS Action page.

  See Chapter 3, "Setting Up French Public Sector Tables," Assigning FPS Components That Can Use the Action, page 17.
- Enter the employee personal data supporting documents required for hiring.

  On the Regional page, the French Public Sector group box lists the supporting documents required for hiring.
- Define the organizational relationship and the type of employee.

  On the Organizational Relationships page, you select the type of employee, a *Commercial Employee* or a *French Public Sector Employee.*
- Assign the FPS employee to a business unit and department, and a job code.

  When you select *French Public Sector Employee* as the employee type on the Organizational Relationships page, the system displays the Business Unit, Department, and Job Code fields.

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

When you save the Add a Person component, the system creates an employee with status *Pending Validation* if it is a French Public Sector employee. You can find more detailed information about these topics in the *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce.*

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Adding a Person in PeopleSoft Human Resources"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Increasing the Workforce"

Initializing Employee Status

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

This section discusses how to:

- Initialize employee status.
- Create a hiring action.

- Enter civil service position data.

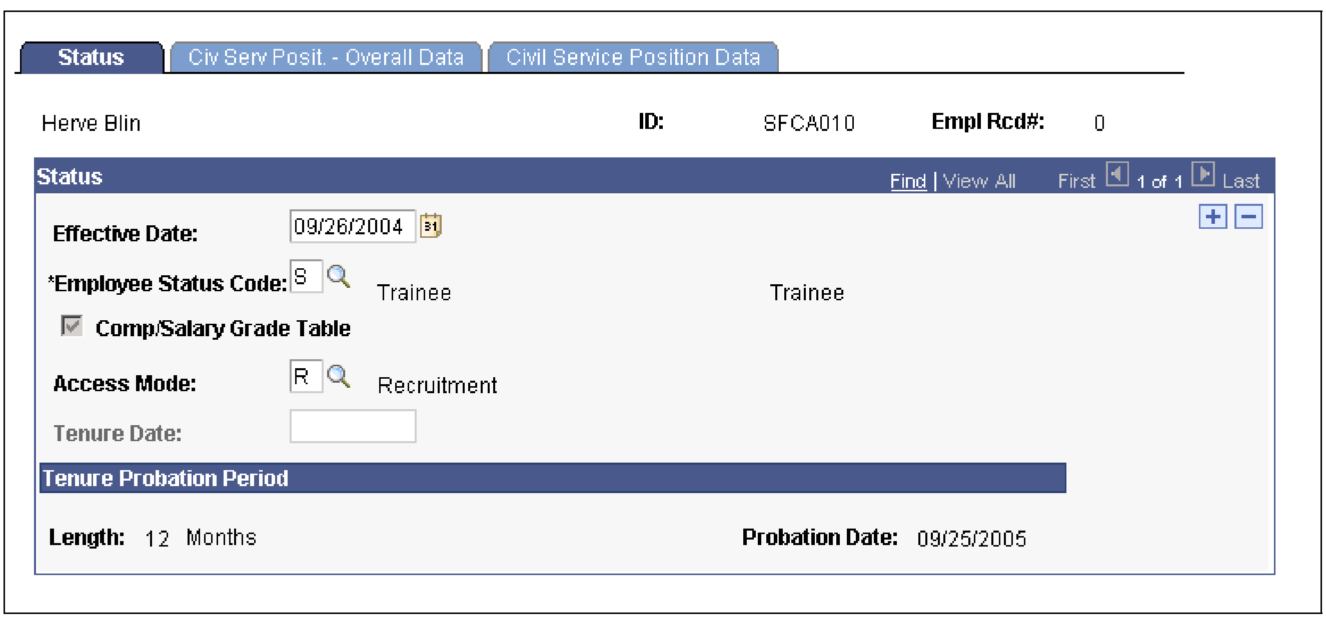
Note. The pages in the Initialize Status FPS component (HIRE_DATA) are identical to those in the Add Concurrent Empl Record FPS and Re-Hire Employee FPS components and share the same object names. The difference between these components is that you use one set of pages when initially hiring an employee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

Pages Used to Initialize Employee Status

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

Initializing Employee Status

Access the Status page.



Status page

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

Employee Status Code

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

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

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

There are two modes of compensation:

- Compensation on salary grade table.

  This implies the assignment of a job code with a salary grade table and a step.

- Free compensation.

  In this mode the amount is directly captured in the Compensation field in the Employee Record FPS component.

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

Access Mode

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

Competition: The employee passed a competitive entry examination.

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

Tenure Date

Available for Civil Servant statuses only.

Length and **Probation Date**

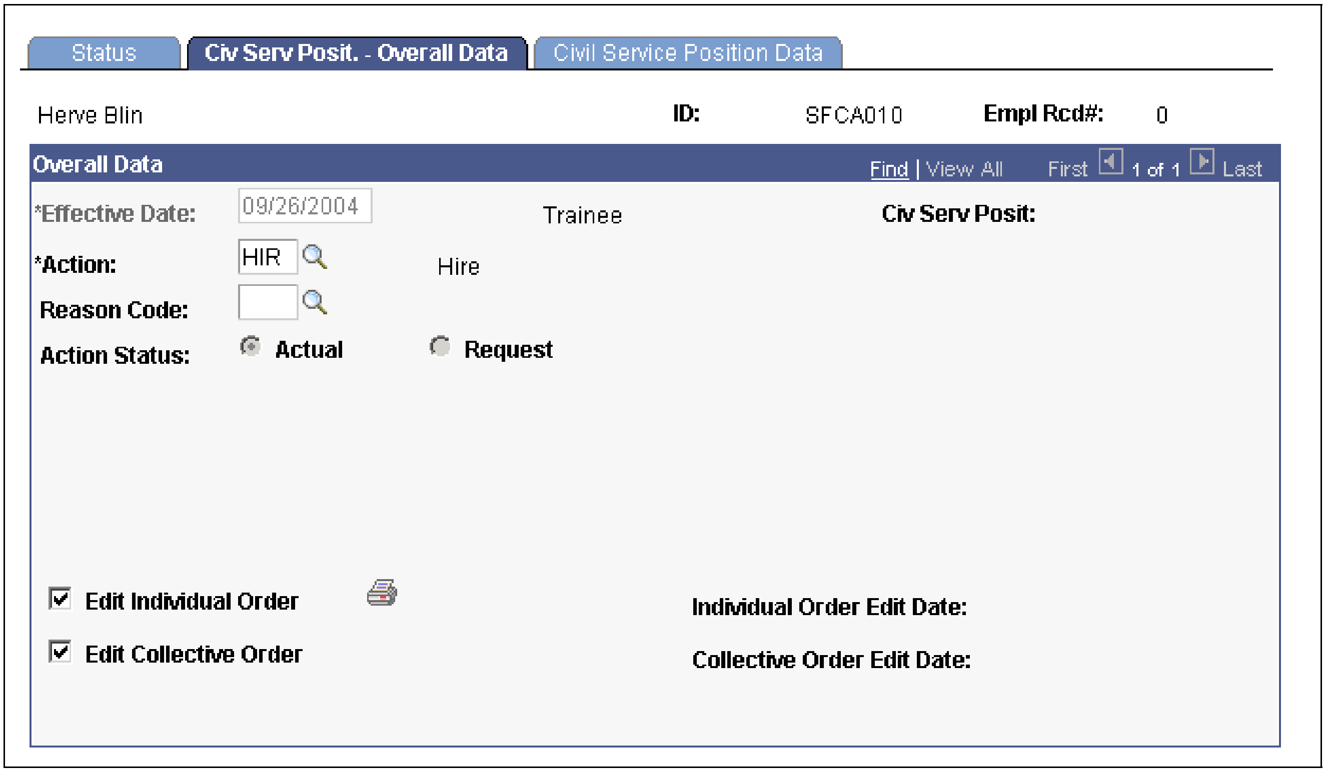
If the status is *Trainee,* the system updates the Tenure Probation Period group box. The Length value corresponds to the duration that is defined when setting up the status code on the Status/Population Codes page. The probation date is the effective date, plus the length of the probation period, minus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

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Defining Status and Population Codes, page 8

Creating a Hiring Action

Access the Civ Serv Posit. - Overall Data page.



Civ Serv Posit. - Overall Data page

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

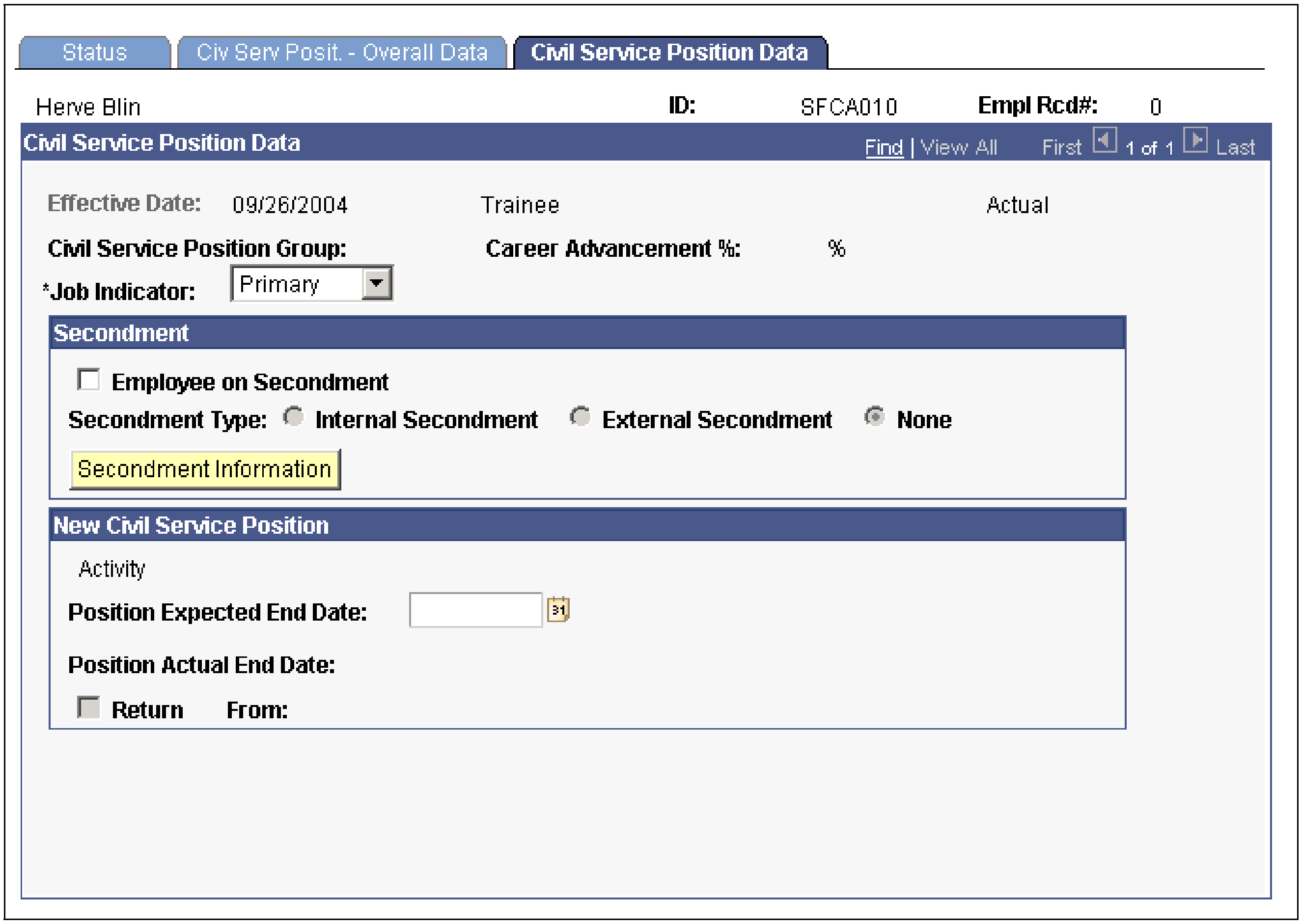
Once you edit the order definitively, you cannot modify the hire data. If you must delete the hire, access Workforce Administration, Job Information, Delete ID FPS.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up Actions, page 14

Entering Civil Service Position Data

Access the Civil Service Position Data page.



Civil Service Position Data page

To enter civil service position data:

1. Enter the job indicator.

   This determines if the record is *Primary* or *Secondary.*

2. In the Secondment group box, indicate if the employee is on secondment.

   Only External Secondment is available for record number 0.

3. Click Secondment Information to enter detailed secondment information.

4. If you know it, enter the expected end date of the position.

   The end date is not mandatory for the hiring action. It can be mandatory for break type actions, such as leaves. To make this field mandatory for an action code, select the Mandatory Expect Dt of Return check box on the FPS Action page.

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," Assigning FPS Components That Can Use the Action, page 17

Updating the Employee Record

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

- Enter the hiring action and contract number.
- Enter career classification information.
- Enter compensation and seniority information.
- Enter work location information.
- Enter job information.
- Enter an employee's working time.
- Enter free compensation.

Understanding the Employee Record

The search view for the Employee Record FPS component (HIRE) displays only employees whose statuses and civil service positions have been initialized but whose employee records are not captured and whose hiring is not yet validated.

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

Employee Status and Available Pages

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

Three scenarios are possible:

- Employees whose statuses allow career data.

  A status allows career data if the Career Data Authorized check box is selected on the Status/Population Codes page for that status. If the employee's status authorizes career data, the following pages are available: Overall Data, Career - Classification, Career - Comp. Seniority, Assignment - Work Location, Assignment - Job Information, Working Time, and Employee Categorization.
- Employees whose statuses do not authorize career data and who are compensated on salary grade table.

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

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

Hiring Validation

When you save the Employee Record FPS component the system validates the hiring process if you have:

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

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

Employee Record Updates

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," Defining Status and Population Codes, page 8

Chapter 4, "Hiring French Public Sector Employees," Validating the Hiring Process, page 66

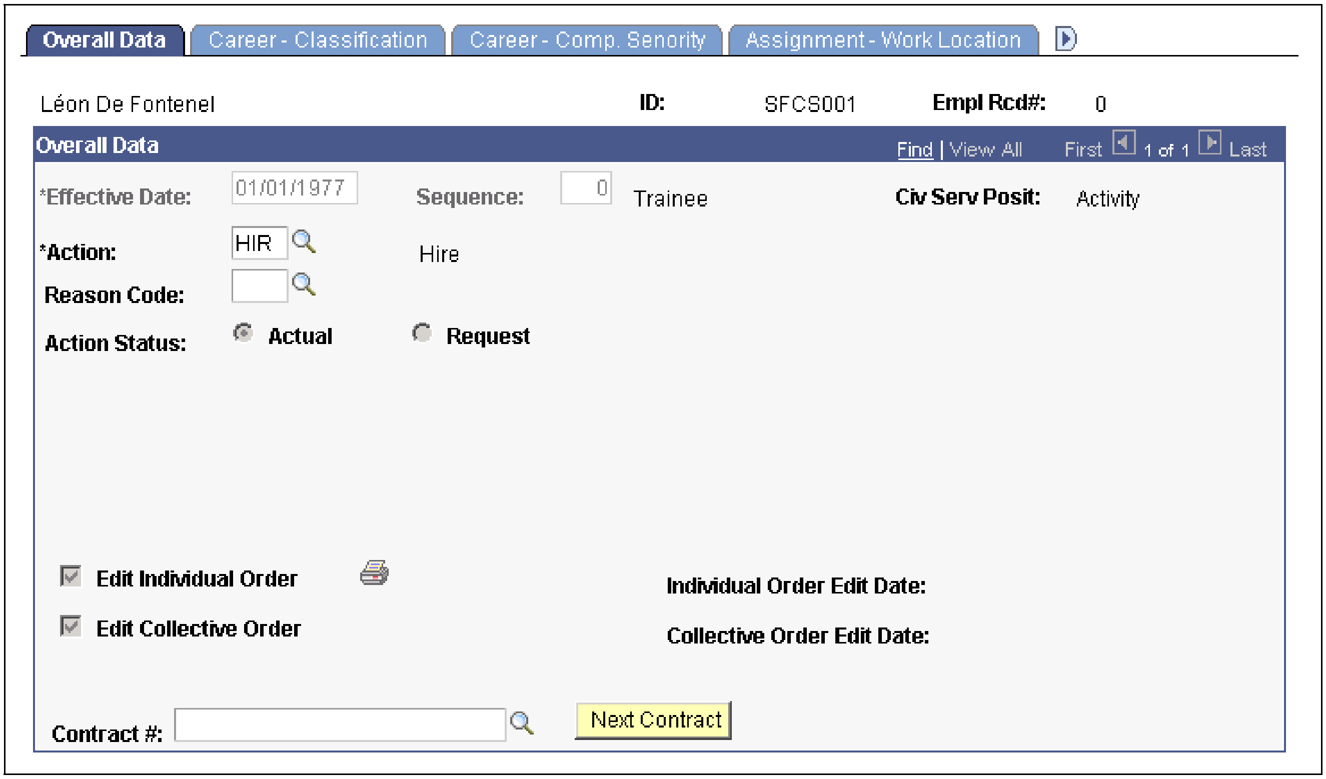
Chapter 5, "Updating Employee Records," page 71

Pages Used to Update the Employee Record

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

Entering the Hiring Action and Contract Number

Access the Employee Record FPS - Overall Data page.



Employee Record FPS - Overall Data page

Action

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

See Chapter 3, "Setting Up French Public Sector Tables," Assigning FPS Components That Can Use the Action, page 17.

See Chapter 3, "Setting Up French Public Sector Tables," Setting the Action Code and Reason Defaults, page 28.

Action Reason Code

Enter a reason for the action. Defined on the Actions Reason page.

Action Status

Request status is not allowed during the hiring process.

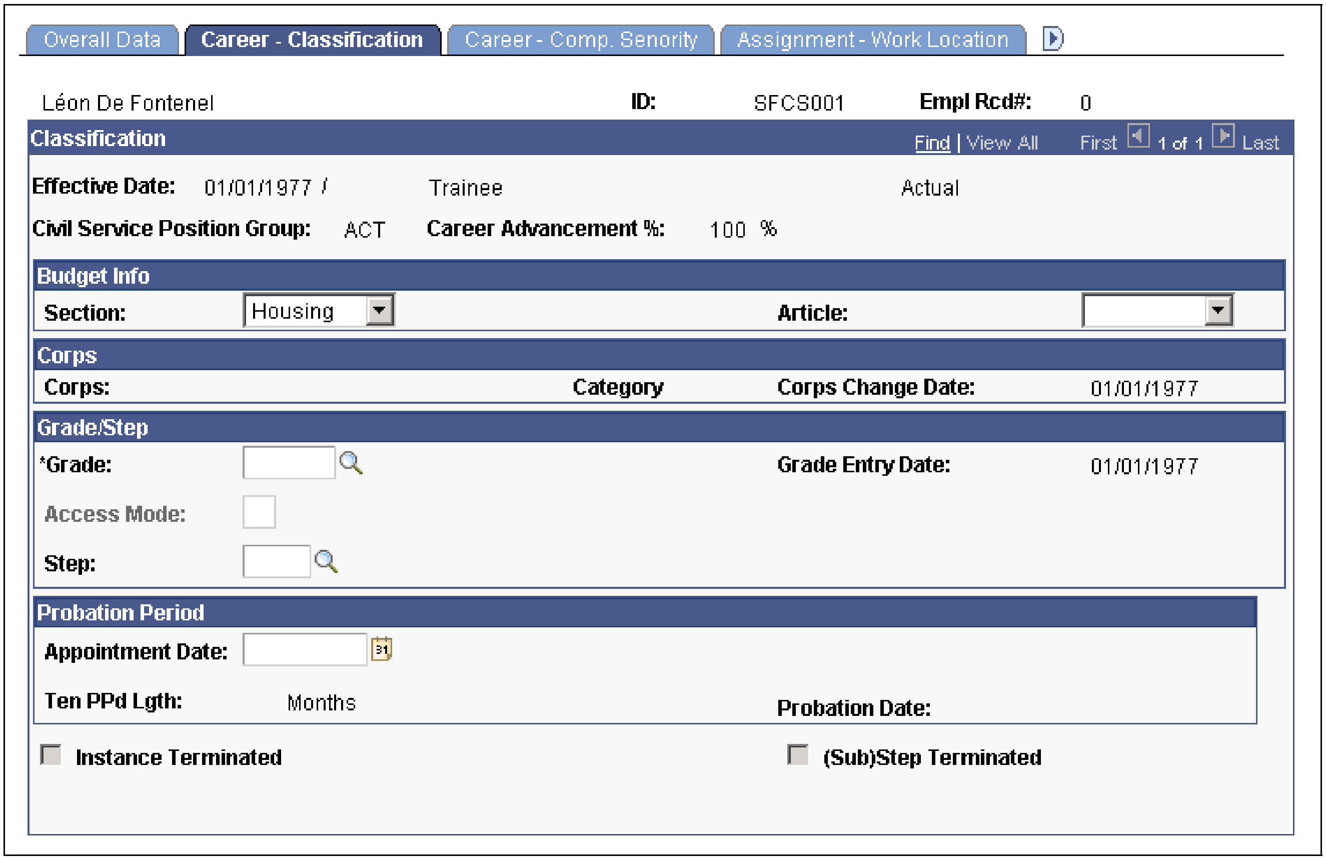
Contract # (contract number)

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

See Chapter 4, "Hiring French Public Sector Employees," Validating the Hiring Process, page 66.

Entering Career Classification Information

Access the Employee Record FPS - Career - Classification page.



Employee Record FPS - Career - Classification page

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

The system assigns the step based on:

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

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

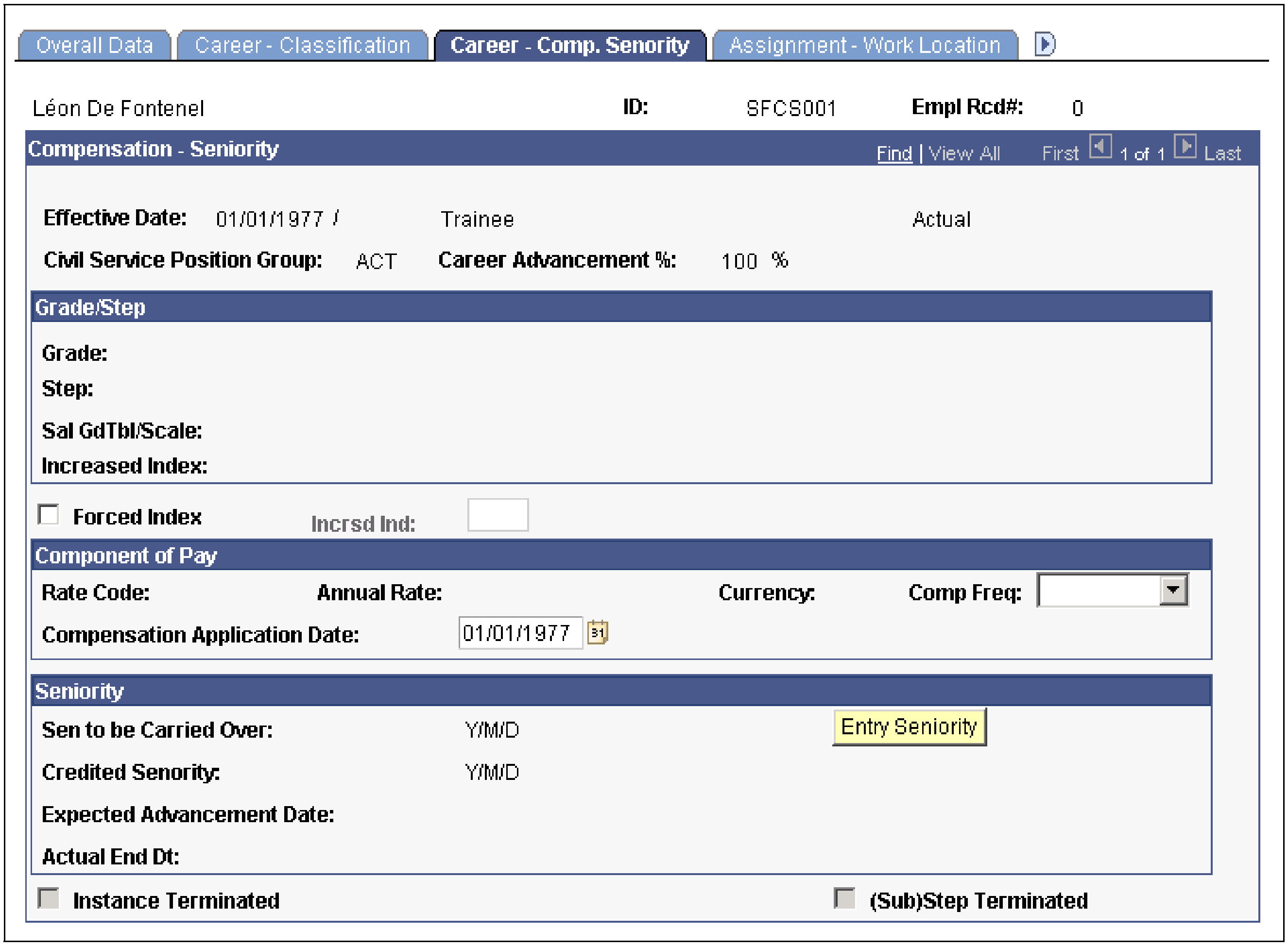
The other fields on this page are similar to those on the Career - Classification page in the Increment Step/Promotion FPS component.

See Also

Chapter 5, "Updating Employee Records," Entering Career Classification Data, page 76

Entering Compensation and Seniority Information

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



Employee Record FPS - Career - Comp. Seniority page

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

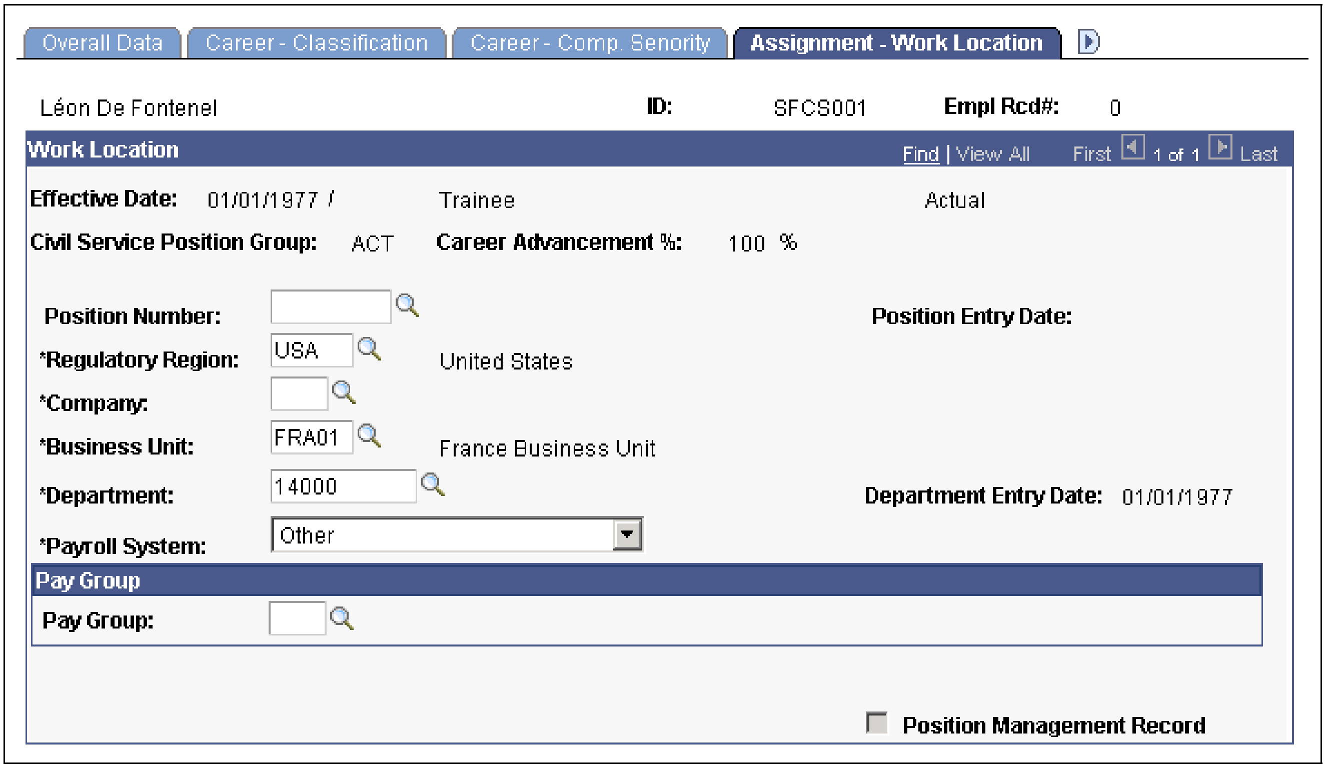
The fields on this page are similar to those on the Career - Comp. Seniority page in the Increment Step/Promotion FPS component.

See Also

Chapter 5, "Updating Employee Records," Viewing Compensation and Seniority Data, page 78

Entering Work Location Information

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



Employee Record FPS - Assignment - Work Location page

There are two methods for populating this page:

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

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

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

  The department depends on the business unit.

You must also enter the employee's pay group. If you are using PeopleSoft Enterprise Global Payroll, you must enter additional information; the *PeopleSoft Enterprise Global Payroll 8.9 PeopleBook* explains the additional fields.

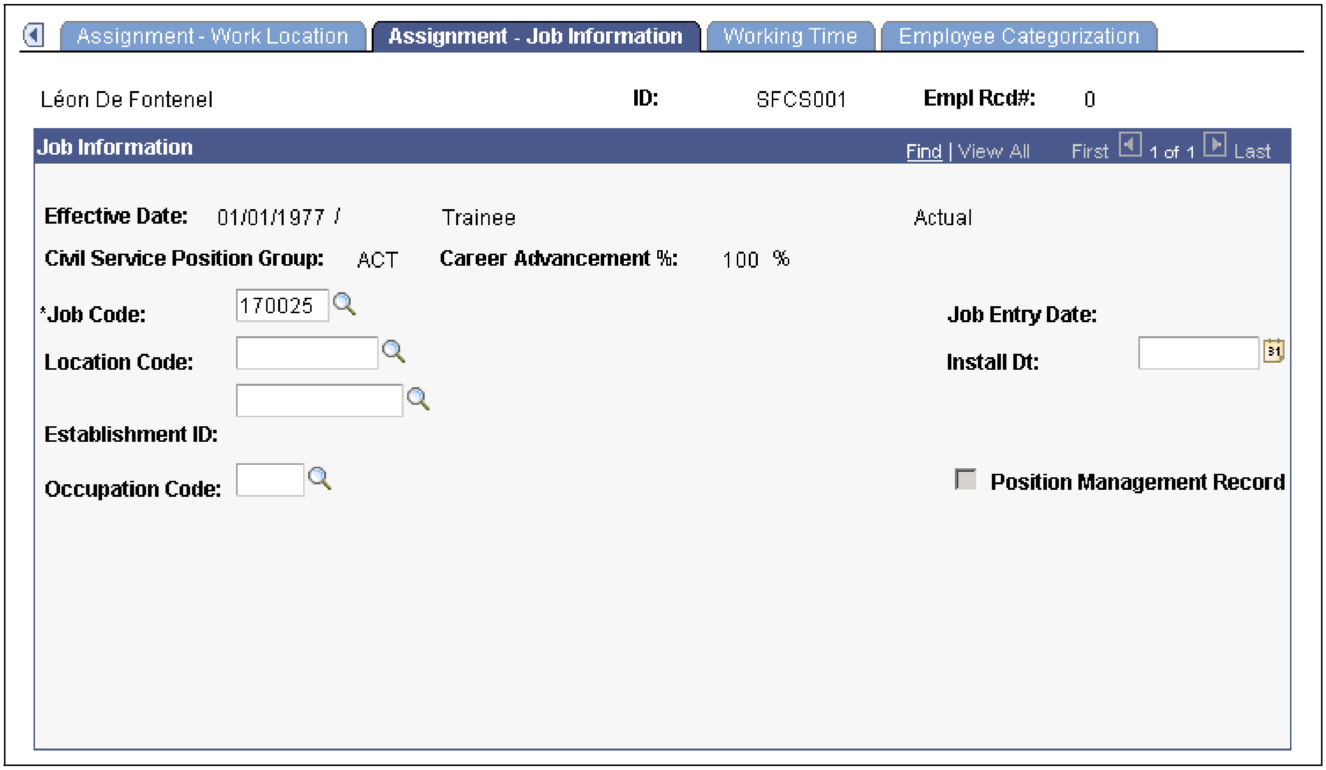
See Also

Chapter 5, "Updating Employee Records," Recording Changes of Position, Business Unit, Company, and Department, page 87

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook, "Working with Payee Data," Understanding Payroll System and Paygroup Assignments for a Payee

Entering Job Information

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



Employee Record FPS - Assignment - Job Information page

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

1. Enter a job code that is associated with a salary grade table.

   The system displays the name of the corresponding salary grade table.

2. Select a step.

   Compensation data appears in the compensation group box.

3. (Optional) Select Forced compensation to modify the compensation amount in the Update Compensation FPS component after the hiring validation.

   This check box appears for employees who are compensated on a salary grade table and whose statuses do not authorize career data.

See Also

Chapter 5, “Updating Employee Records,” Modifying Job Data, page 88

Entering an Employee’s Working Time

Access the Employee Record FPS - Working Time page.

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

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

See Also

Chapter 5, “Updating Employee Records,” Tracking an Employee’s Working Time, page 94

Entering Free Compensation Information

Access the Compensation page.

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

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

See Also

Chapter 5, "Updating Employee Records," Updating Compensation for Employees, page 90

Assigning Seniority Bonuses

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

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

This section discusses how to create seniority bonuses.

Pages Used to Assign Seniority Bonuses

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

Entering the Seniority Bonus Code

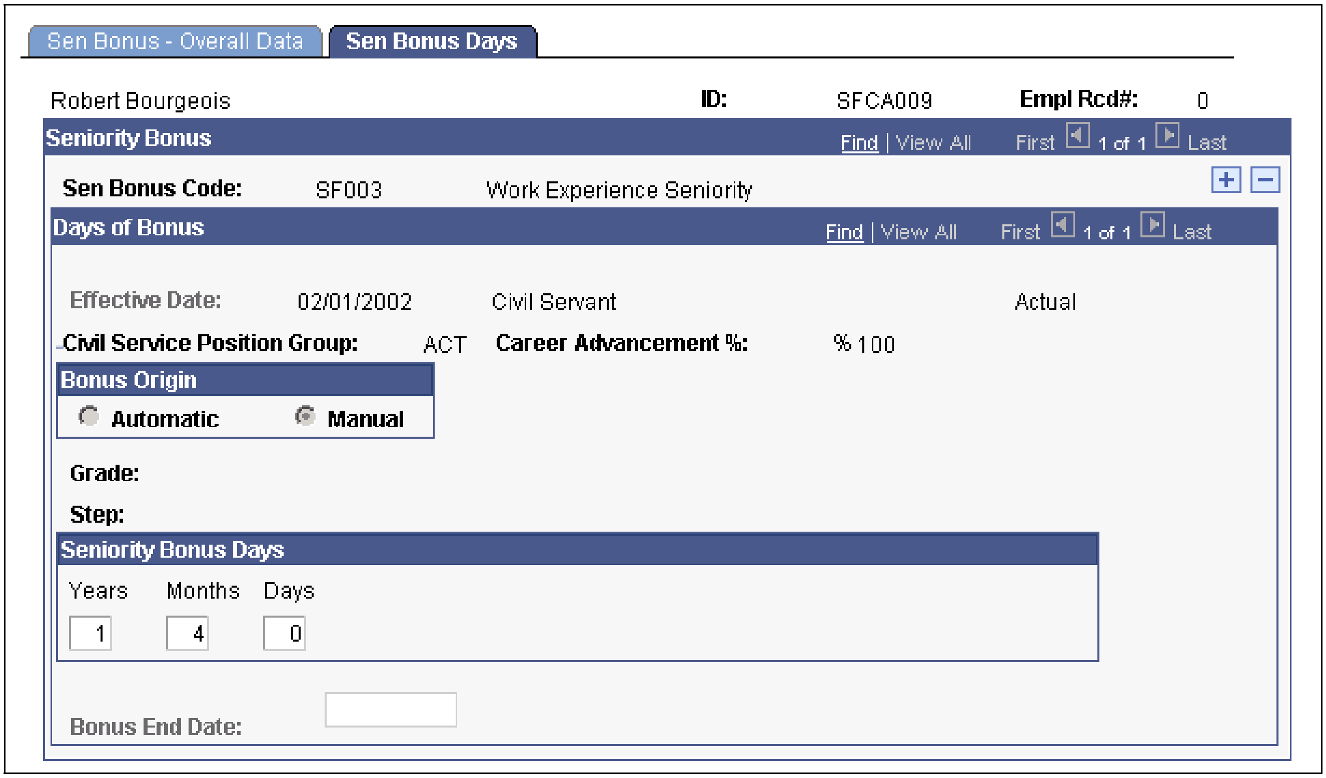
Access the Sen Bonus - Overall Data page.

Enter the seniority bonus code and the action code.

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

Creating Seniority Bonuses

Access the Sen Bonus Days page.



Sen Bonus Days page

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

Click the Add button to enter additional bonuses.

Validating the Hiring Process

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

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

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

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

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

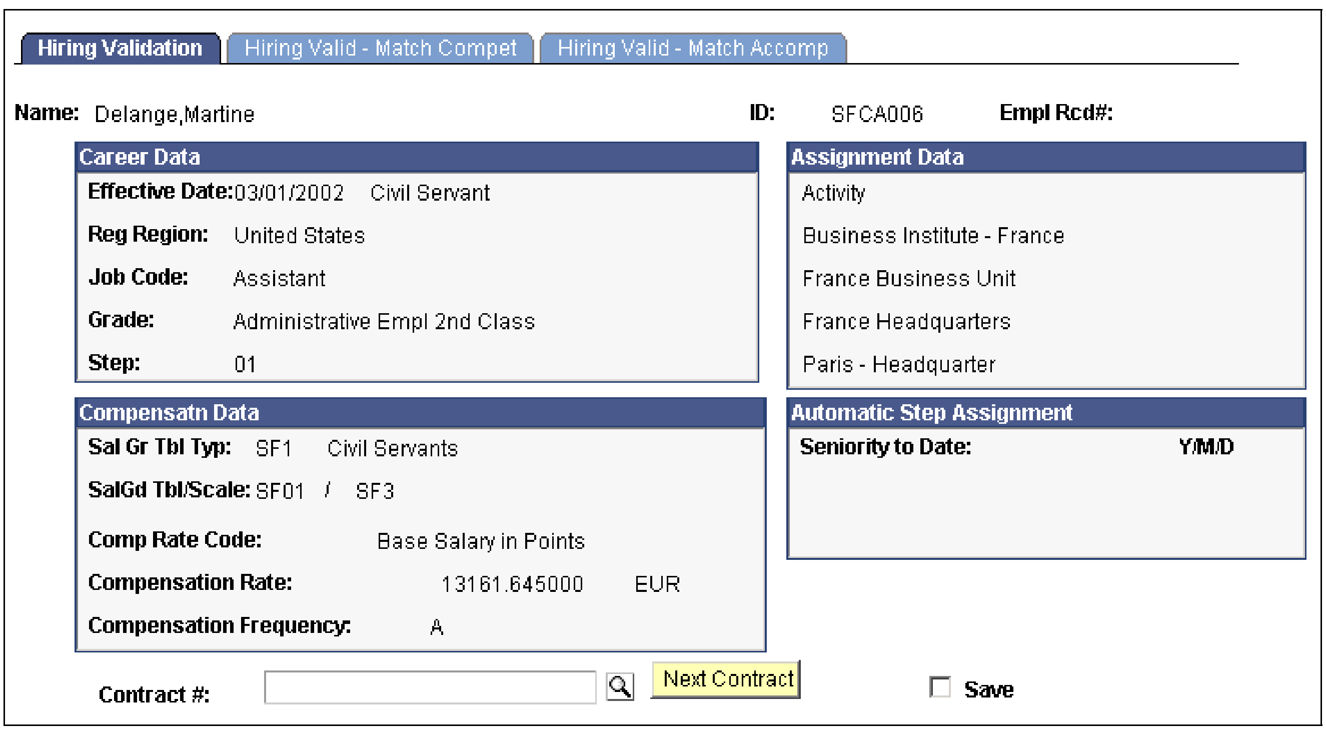
This section discusses how to validate the hire.

Pages Used to Validate the Hiring Process

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

Validating the Hiring Process

Access the Hiring Validation page.



Hiring Validation page

To validate the hiring process:

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

   If the employee is lacking competencies or accomplishments, the system issues a message but the process continues. Once you save the page, the employee's status is *Active.*
4. For employees in a grade but with no step, the system assigns a step when hiring is validated and displays it in the Automatic Step Assignment group box.

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

Rehiring an Employee

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

Pages Used to Rehire an Employee

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

See Also

Chapter 4, "Hiring French Public Sector Employees," Initializing Employee Status, page 52

Adding Concurrent Jobs

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

Pages Used to Add Concurrent Jobs

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

See Also

Chapter 4, "Hiring French Public Sector Employees," Initializing Employee Status, page 52

Chapter 15, "Managing Secondment," page 153

Deleting an Employee Hiring

To delete an employee hire, run the Delete FP Hire SQR process (FPA250). This section discusses how to delete an employee ID.

Page Used to Delete an Employee Hiring

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

Deleting an Employee ID

Access the FPS Delete ID page.

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

- Personal Data
- Status
- Civil Service Position
- Career
- Assignment
- Compensation
- Work Time
- Employee Categorization

You cannot reuse a deleted employee ID.

CHAPTER 5

Updating Employee Records

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

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

Understanding Employee Data Updating

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

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

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

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

Entering an Action

Available actions depend on:

- The user's role.

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

  Only actions that are authorized for the component can be selected. You authorize Actions on the FPS Action page.
- The employee's status.

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

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

To enter an action:

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

   The civil service position does not determine the effective sequence.
3. Select the action.
4. Select the action status, either Actual or Request.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up FPS Installation Parameters, page 25

Chapter 3, "Setting Up French Public Sector Tables," Setting Up Actions, page 14

Chapter 3, "Setting Up French Public Sector Tables," Defining Civil Service Positions, page 10

Chapter 14, "Managing Requests," page 147

Editing Individual or Collective Orders

This section discusses how to edit an order.

Pages Used to Edit Individual or Collective Orders

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

Editing an Order

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

To edit an order:

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

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," Defining Individual and Collective Orders, page 24

Deleting an Action

To delete an action:

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

  Abrogated documents are edited, and the abrogation date is displayed. Once the order abrogation is edited, the move is deleted and the data is stored.
- Click the Delete button for actions without orders or with incomplete orders.

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

Managing Personal Data

Use the Modify a Person component to modify employees' person information such as their address and marital status.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Updating Person and Job Information," Updating Personal Data.

Managing Career Data

This section provides an overview of career data and discusses how to:

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

Understanding Career Data

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

Several collective processes are associated with career data:

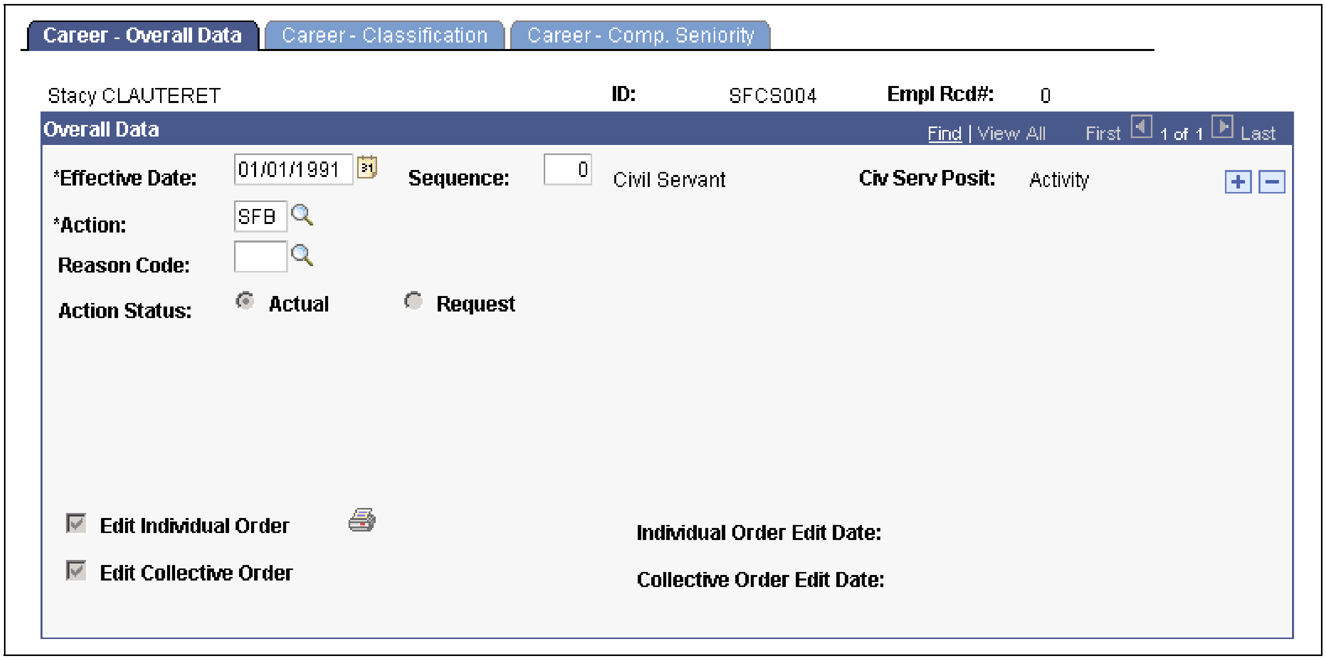
- Seniority calculation.
- Automatic step increment date calculation.
- Probation period management.
- Reclassification process.
- Retroactivity process.

Pages Used to Manage Career Data

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

Entering an Action that Adds or Modifies Employee Career Data

Access the Career - Overall Data page.



Career - Overall Data page

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

Action Status Select a status. Values are:

Actual: The default status.

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

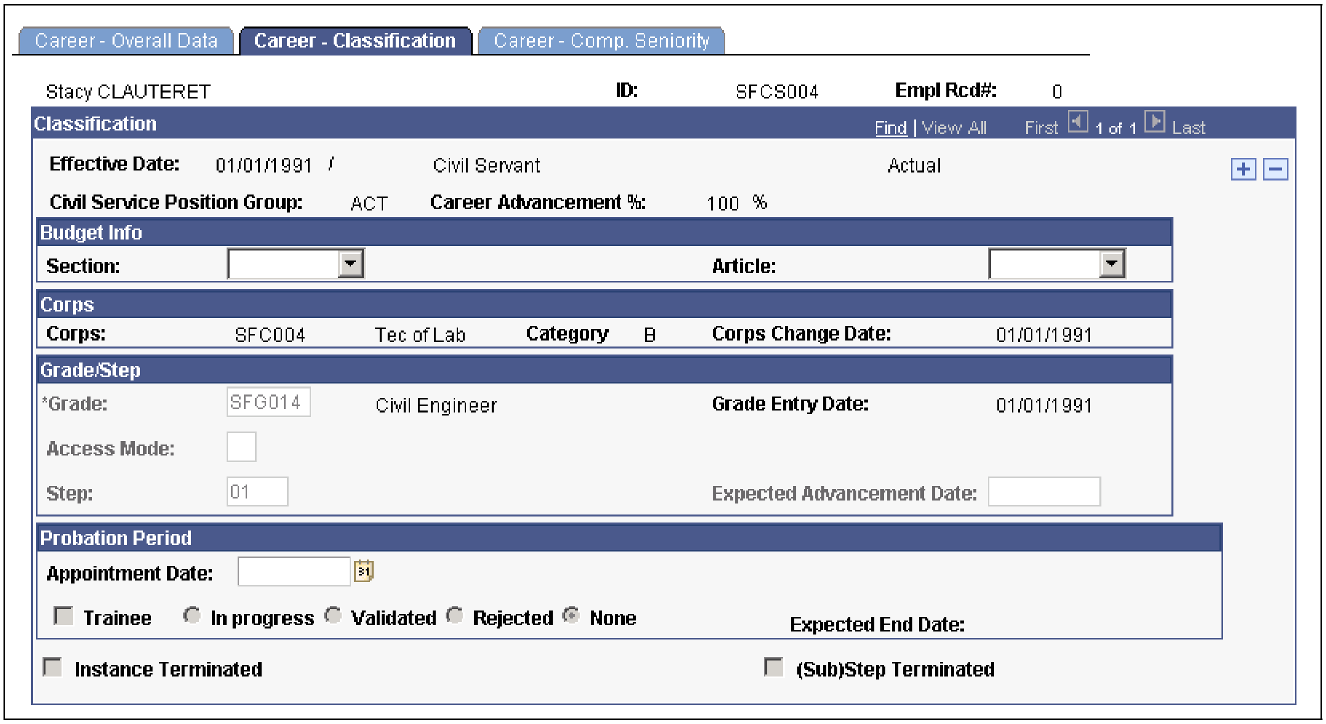
See Also

Chapter 14, “Managing Requests,” page 147

Chapter 5, “Updating Employee Records,” Understanding Employee Data Updating, page 71

Entering Career Classification Data

Access the Career - Classification page.



Career - Classification page

Section and **Article** — Select the section. This information is required if your system controls budget headcount.

Corps — Displays the corps name. When the corps changes, the entry date for the new corps is updated with the effective date.

Grade/Step

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

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

Access Mode — You can access this field only for grade promotions.

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

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

Probation Period

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

Expected End Date

Displays the effective date, plus the promotion probation period length, minus 1 day.

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

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

Ten PPd Lgth (tenure probation period length)

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

Probation Date

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

See Also

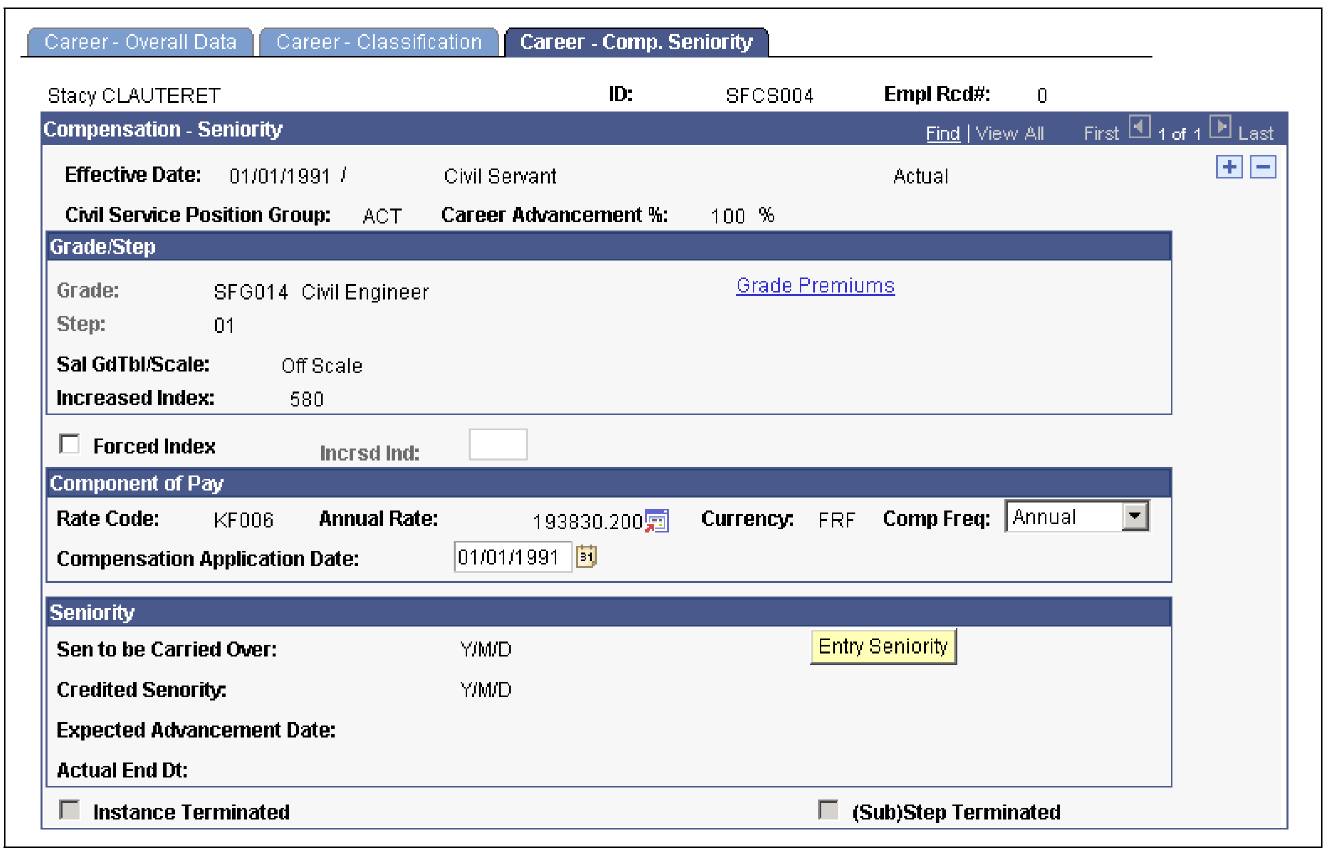
Chapter 10, "Processing Career Advancement," page 127

Chapter 8, "Managing the Promotion Probation Period," page 117

Chapter 7, "Processing Trainee Tenure," page 109

Viewing Compensation and Seniority Data

Access the Career - Comp. Seniority page.



Career - Comp. Seniority page

Grade Premiums

Click to access the Grade Premiums page of the Grades component.

Grade and **Step**

Depending on the grade and step that you entered on the Career - Classification page, the system displays a summary page of the employee classification: corps, grade, Salary Grade table, and scale.

Forced Index and **Incrsd Ind** (increased index)

Select the Forced Index check box to modify the index that corresponds to the employee's grade and step in the Salary Grade table. Enter the new index value in the Incrsd Ind field, which becomes available for entry.

Component of Pay

Annual Rate, Currency, and **Comp Freq** (compensation frequency)

Click the right mouse button to convert the compensation rate to another currency. The system uses the triangulation method. You can also convert the compensation rate to another frequency. The system does not record the modification.

Compensation Application Date

Displays the effective date. You can modify this date if the effective date comes before the application date.

Seniority

Sen to be Carried Over (seniority to be carried over) and **Credited Seniority**

Display values that are calculated during the collective seniority process.

Entry Seniority

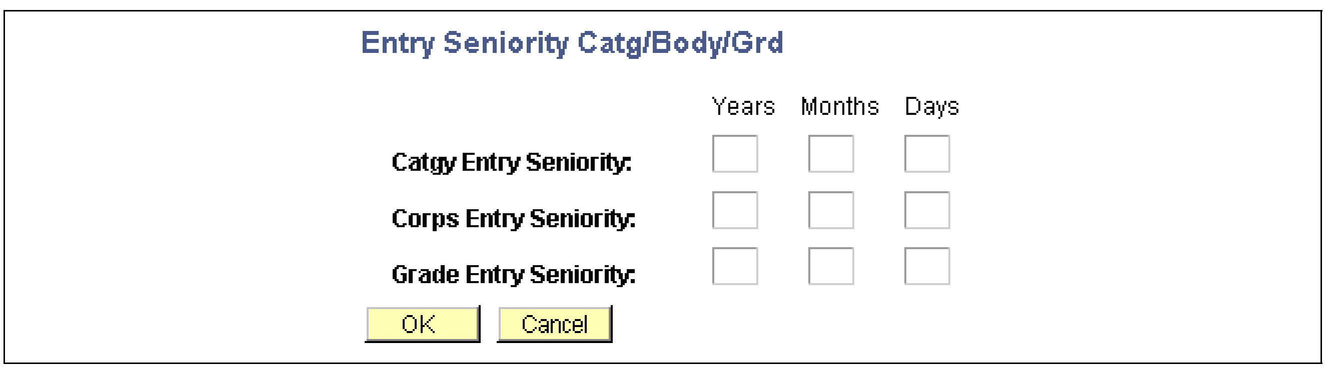
Click to record seniority that is acquired in another organization or during military service. You can enter seniority in category, corps, and grade.

Instance Terminated and **(Sub)Step Terminated**

These check boxes are cleared for a new row. Manage French Public Sector uses both indicators in the seniority calculation collective process.

Recording Entry Seniority Earned in Another Organization

Access the Entry Seniority Catg/Body/Grd page.



Entry Seniority Catg/Body/Grd page

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

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

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

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

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

See Also

Chapter 9, "Calculating Seniority and Length of Service," page 121

Saving Career Data

When saving a new action, the system:

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

  The end date equals the next move effective date, minus 1 day.
- Selects the Instance Terminated check box in the prior row.

  A move is terminated as soon as it is followed by another move.
- Selects the Step Terminated check box in the previous row unless the last move that was inserted is an action that authorizes Previous Instance Seniority Carry Over.

  Seniority carryover is defined in the Previous Instance Sen Carry Ov field on the FPS Actions page (Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Actions).

Deleting Career Data

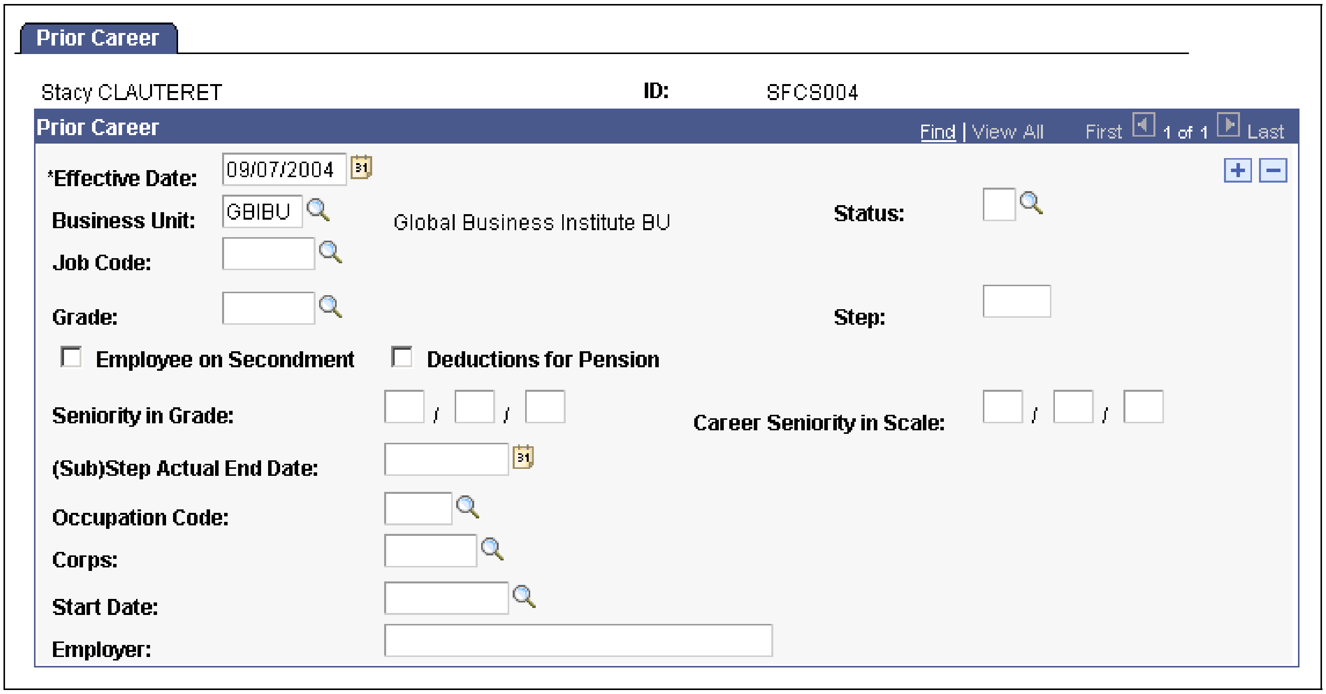
You can delete an action that is specifically recorded in the Career component. When you do so, the system checks the consistency. For instance, when you delete a step increment action, the system checks that a seniority bonus that is associated with the step has not been granted. If it has, a message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

See Also

Chapter 5, "Updating Employee Records," Deleting an Action, page 73

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

Access the Prior Career page.



Prior Career page

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

Managing Sanctions and Demotions

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

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

This section discusses how to:

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

Pages Used to Manage Sanctions and Demotions

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

Entering a Sanction or Demotion Action

Access the Sanct/Demotion - Overall Data page.

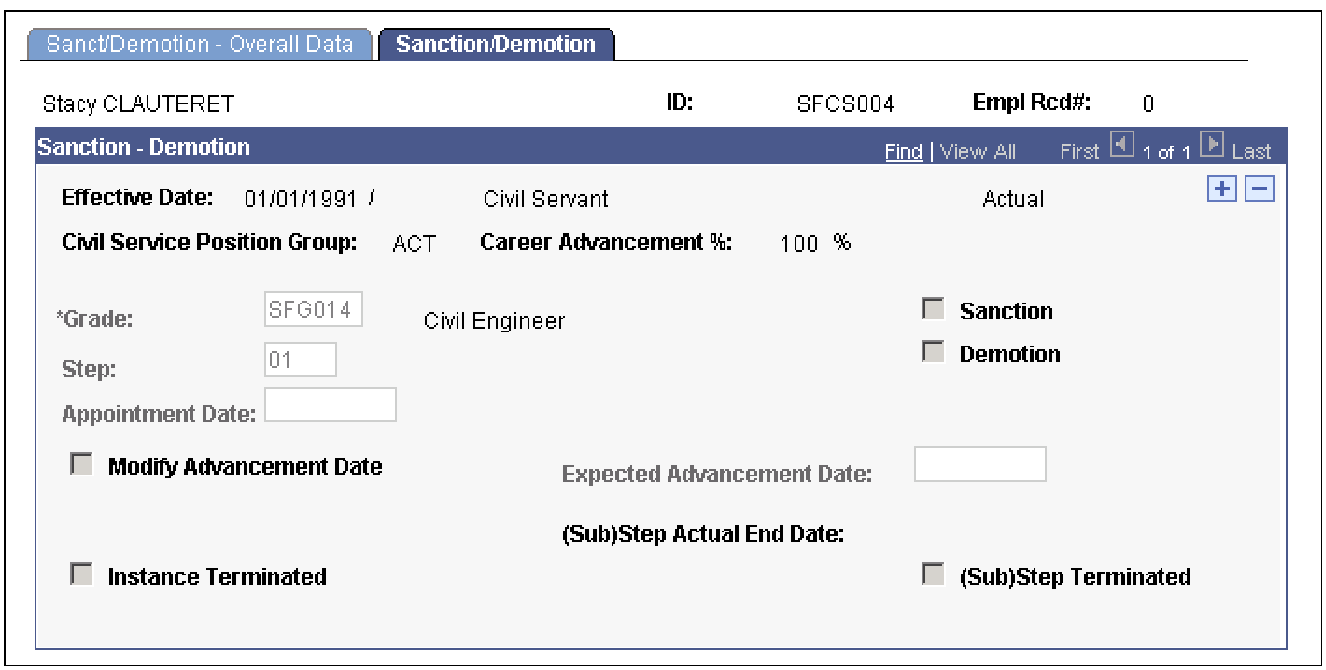
To enter a sanction or demotion:

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

   The available actions include only sanction and demotion actions. You define whether an action is a sanction or demotion action when setting up the action on the Action Details page.
3. Enter the action status.
4. Select whether to edit an individual or collective order for this action.

Enter Sanction or Demotion Details

Access the Sanction/Demotion page.



Sanction/Demotion page

If you entered a sanction action code, the system selects the Sanction check box to indicate the action is a sanction. To enter sanction details:

1. Enter an appointment date.
2. Select Modify Advancement Date to change the employee's advancement date and enter the new advancement date in Expected Advancement Date.

If you entered a demotion action code, the system selects the Demotion check box to indicate the action is a demotion. To enter demotion details:

1. Enter an appointment date.
2. Enter the new step.

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

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

Managing Civil Service Positions

This section provides an overview of civil service positions and discusses how to enter civil service position data.

Understanding Civil Service Positions

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

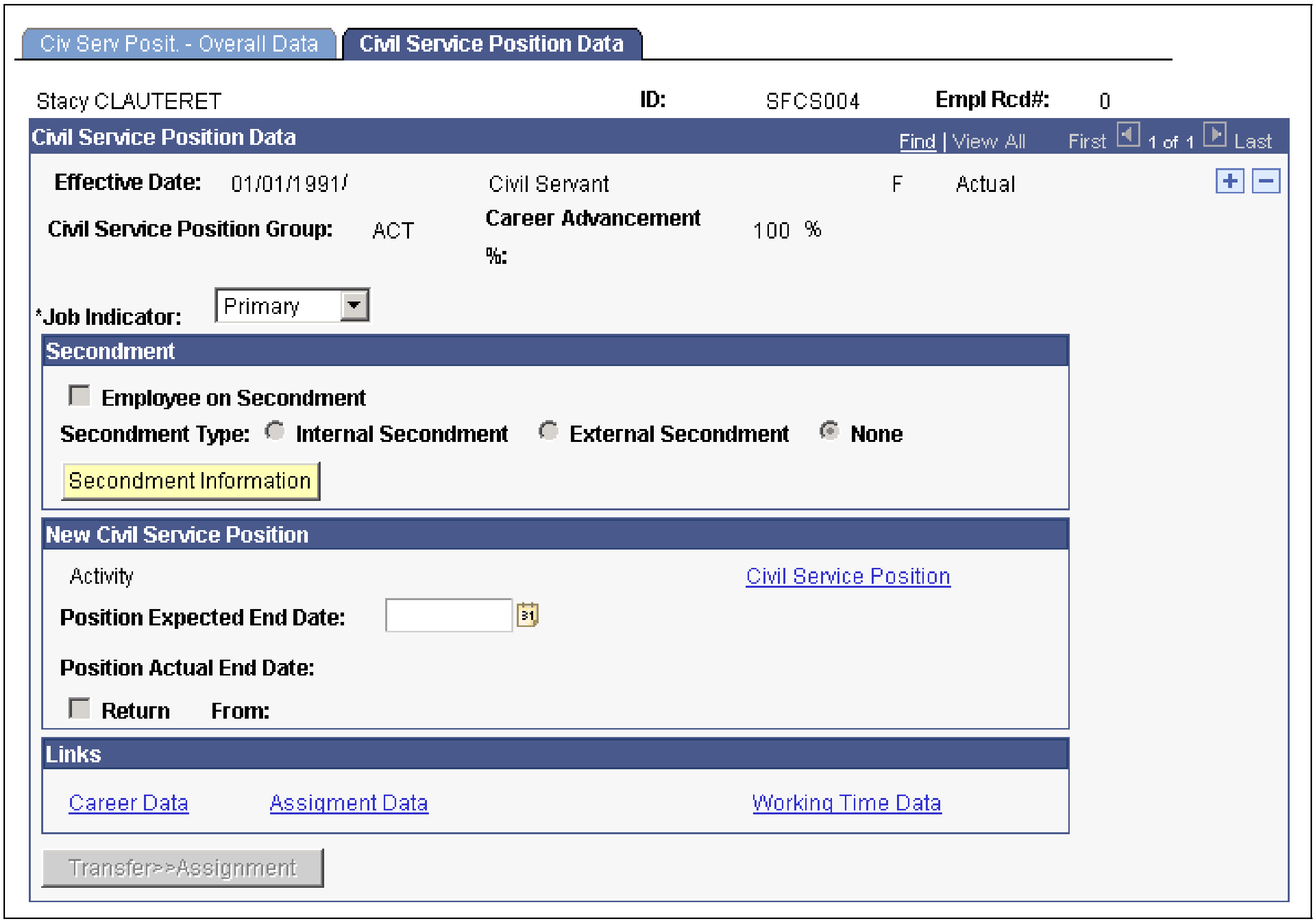
For each new civil service position, Manage French Public Sector verifies that all civil service positions match the moves (past and future) that are selected in the employee's record. If there are incompatibilities, you cannot insert a move in the Chg Civil Service Position FPS component.

Pages Used to Manage Civil Service Position

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

Entering Civil Service Position Data

Access the Civil Service Position Data page.



Civil Service Position Data page

To enter civil service position data:

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

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

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

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

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

Managing Employee Status

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

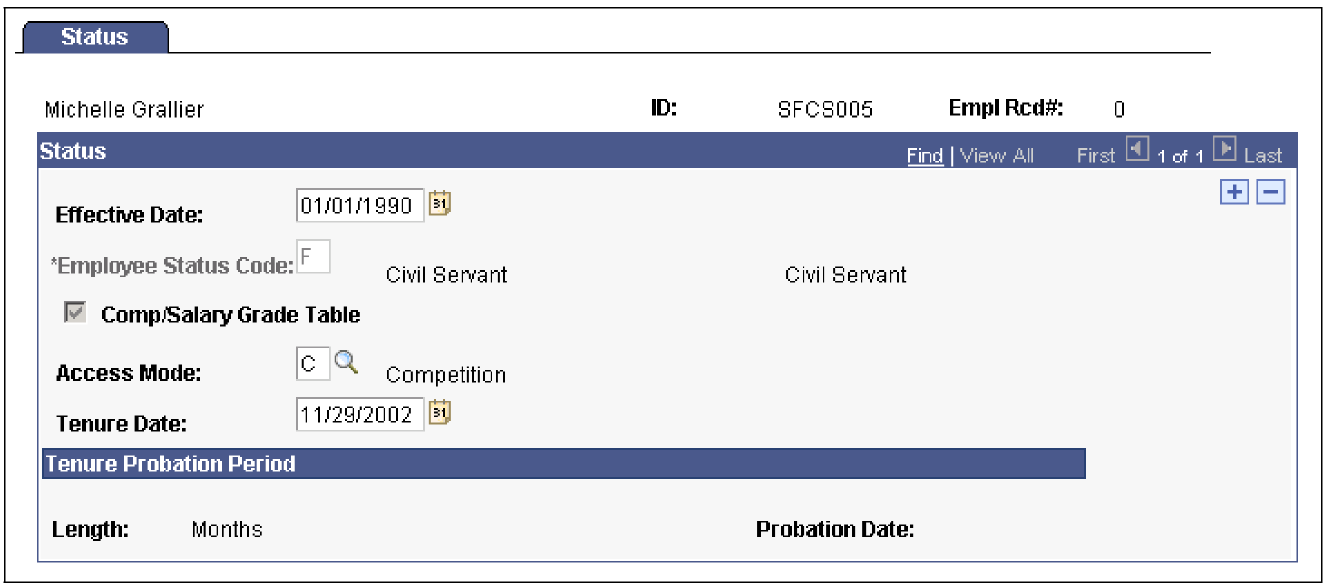
Note. If you are changing an employee's status from Without Career to With Career, PeopleSoft recommends that you create a new employee record.

Page Used to Update Employee Status

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

Viewing and Changing an Employee's Status

Access the Status page.



Status page

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

Employee Status Code Enter the new employee status.

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

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

Tenure Date Enter the tenure date for Civil Servant and Trainee statuses only.

Tenure Probation Period

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

Length Displays the tenure probation period length in the trainee's grade for trainees.

Probation Date Displays the probation period end date that is calculated by the process. It accounts for possible statutory breaks during probation period length and part-time work.

See Also

Chapter 7, "Processing Trainee Tenure," page 109

Chapter 4, "Hiring French Public Sector Employees," page 51

Managing Assignments

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

This section discusses how to:

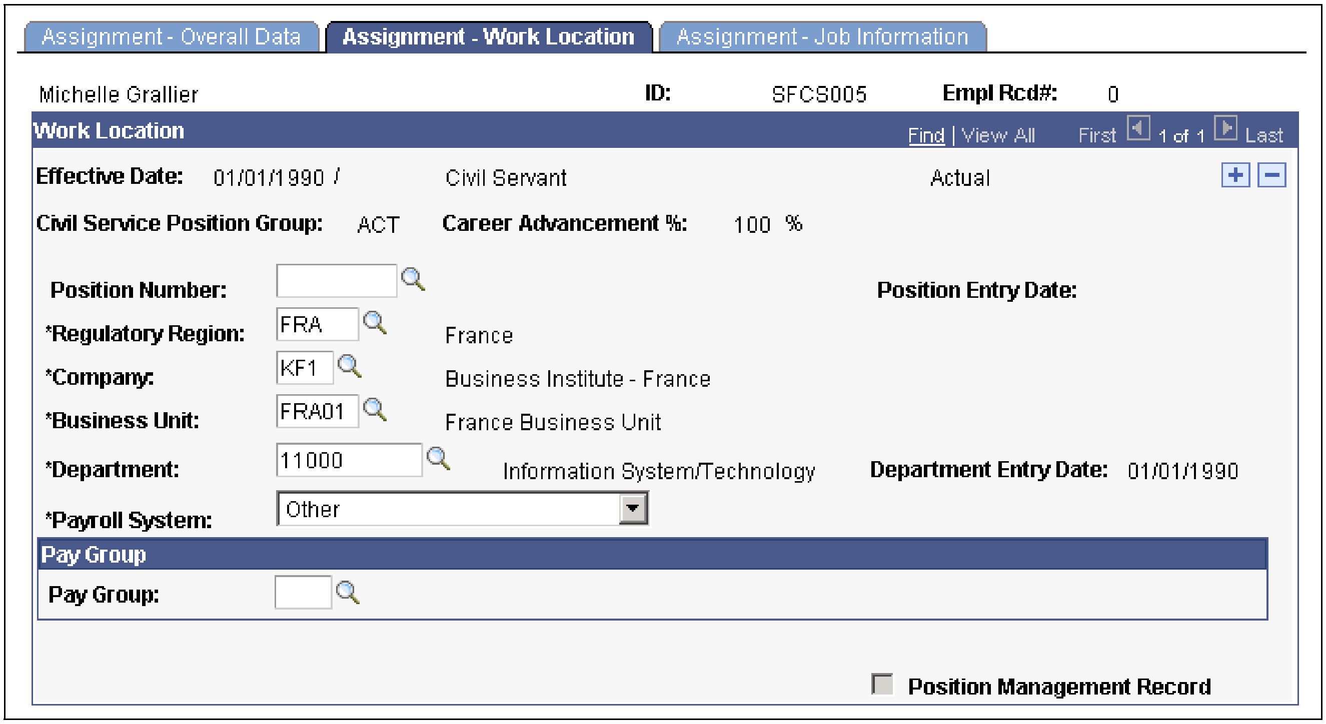
- Record changes of position, business unit, company and department.
- Modify job data.

Pages Used to Manage Assignments

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

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

Access the Assignment - Work Location page.



Assignment - Work Location page

To record changes:

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

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

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

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

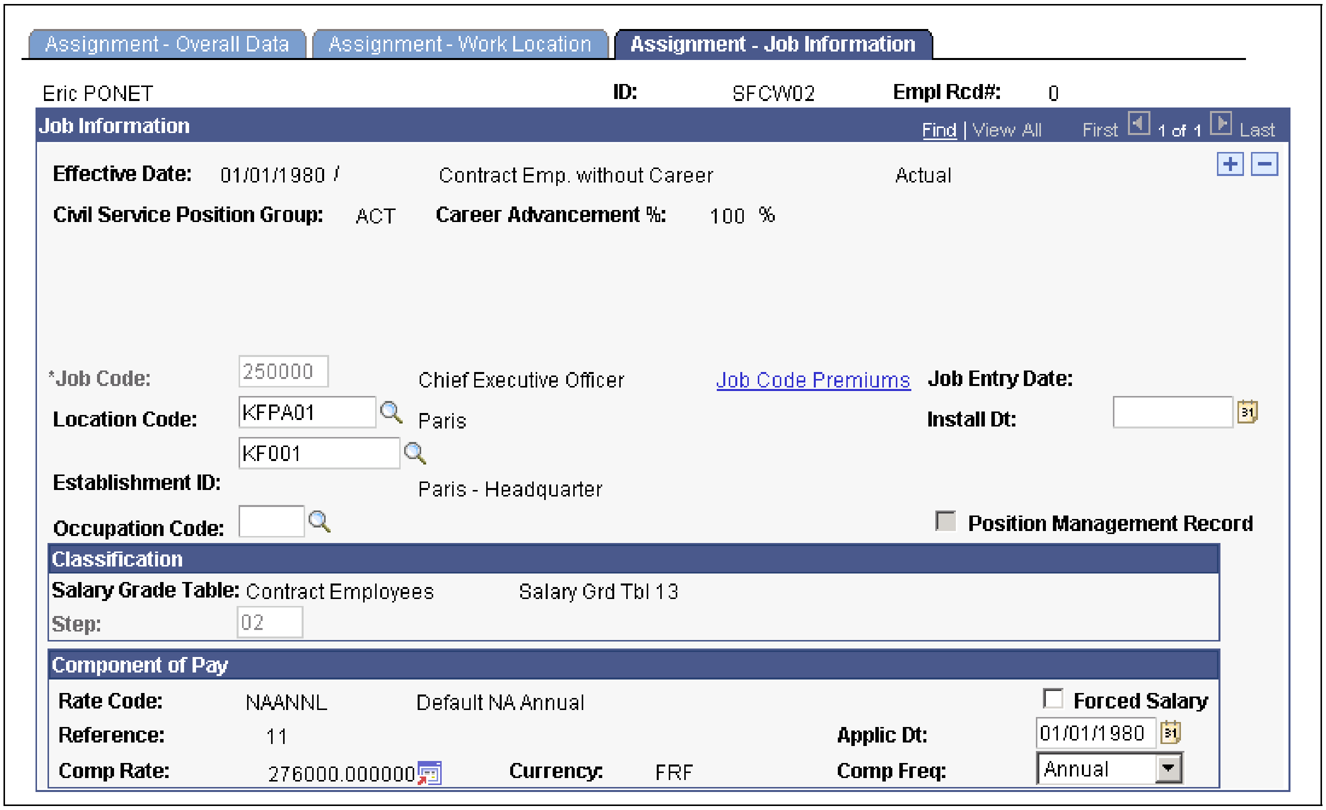
You must also enter the employee's pay group. If you are using PeopleSoft Enterprise Global Payroll, you must enter additional information.

See Also

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook, "Defining the Organizational Structure," Defining Paygroups

Modifying Job Data

Access the Assignment - Job Information page.



Assignment - Job Information page

Job Code Premiums Click to access the Job Code Premiums component.

Step Enter the step for employee on the Salary Grade Table.

Forced Salary Select to be able to adjust the component of pay data on the Compensation - 2 page.

Component of Pay Displays compensation elements.

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

Managing Compensation Data

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

Understanding Compensation Management

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

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

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

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

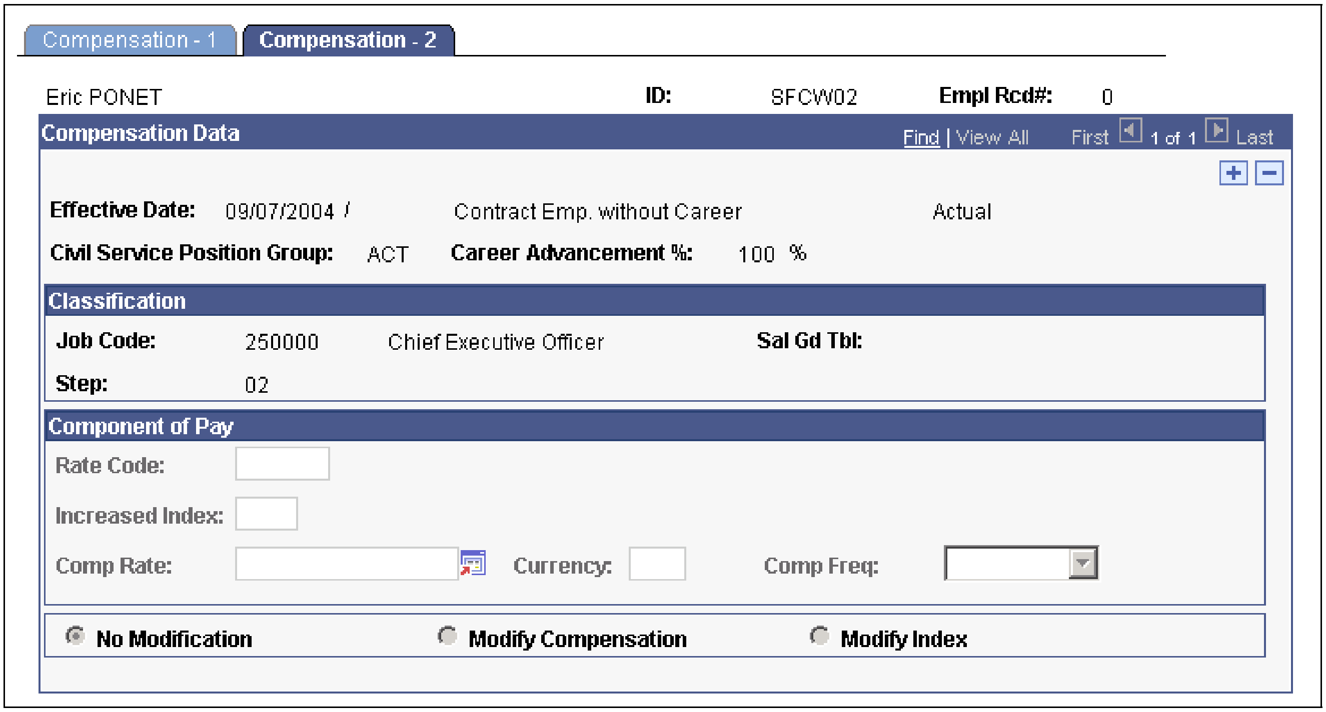
Status	Pages	Managed Data
Employee With Career	Career - Compensation Seniority	Compensation + Forced Index
Employee Without Career - in Salary Grade table	Assignment - Job Information, Compensation - 2	Base Compensation, Forced Salary
Employee Without Career - outside Salary Grade table	Compensation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

Pages Used to Update Compensation Data

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

Updating Compensation for Employees

Access the Compensation - 2 page.



Compensation - 2 page

Updating Compensation for Employees in Salary Grade Tables

To update compensation for employees in salary grade tables:

1. Select *Modify Index* or *Modify Compensation.*

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

2. Adjust the Component of Pay data.

Updating Compensation for Employees with Free Compensation

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

To update compensation for employees with free compensation:

1. Enter the Rate Code.
2. The system populates Frequency, Currency, and Comp Rate:

   Modify these values as needed.

Managing Employee Premiums

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

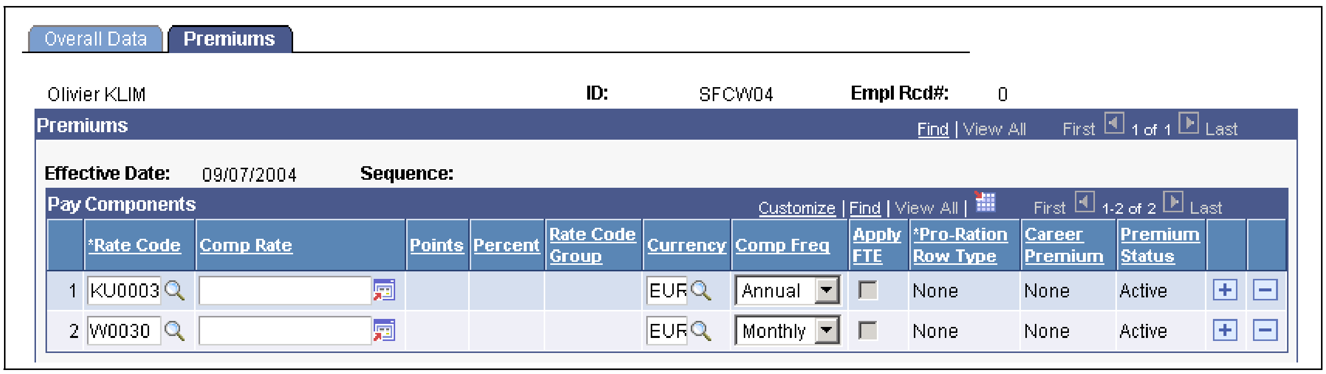
This section discusses how to update employee premiums.

Pages Used to Manage Employee Premiums

Page Name	Object Name	Navigation	Usage
Employee Record - Overall Data	FPAEEPREMIUM_PNL1	Workforce Administration, Job Information, Grant Premiums FPS, Overall Data	Enter an action that adds or modifies employee premium data.
Premiums	FPAEEPREMIUM_PNL2	Workforce Administration, Job Information, Grant Premiums FPS, Premiums	Update employee premium data.

Updating Employee Premiums

Access the Premiums page.



Premiums page

When you select the Rate Code, the system makes some fields unavailable depending on the type of rate code. This table summarizes which fields are available and unavailable for each type of rate code:

Rate Code Type	Fields Available	Fields Unavailable
A flat amount	Comp Rate, Currency, and Comp Freq	Points, Percent, and Rate Code Group
Percentage	Percent and Rate Code Group	Rate Code, Comp Rate, Points, Currency, and Comp Freq
Valued in points	Points, Currency, and Comp Freq	Comp Rate, Percent, and Rate Code Group

Rate Code Enter the rate code for the premium.

Currency Optional.

Comp Freq (compensation frequency) Optional.

Pro-Ration Row Type Select a type. Values are *Main Salary, Secondary,* or *None.*

Career Premium Displays a value that indicates whether the premium is granted for the current step or grade. Values are:

Grade/Step Sensitive: The premium is deactivated when a change in step occurs.

Grade sensitive: The premium is deactivated when a change in grade occurs.

None: The premium is granted regardless of career path.

This field is unavailable for entry if the employee is not a civil servant and therefore does not have grade/step career data.

Premium Status Displays the status. Values are:

Active: The premium is active.

On Hold: The premium is not aligned with the grade or grade and step data.

Reactivated: The premium is reactivated.

Linking the Career Premium and Premium Status Fields

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

- Open occurrences

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

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

- Closed occurrences

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

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

See Also

Chapter 5, "Updating Employee Records," Saving Career Data, page 80

Chapter 11, "Running the Retroactivity Process," page 133

Managing Work Time

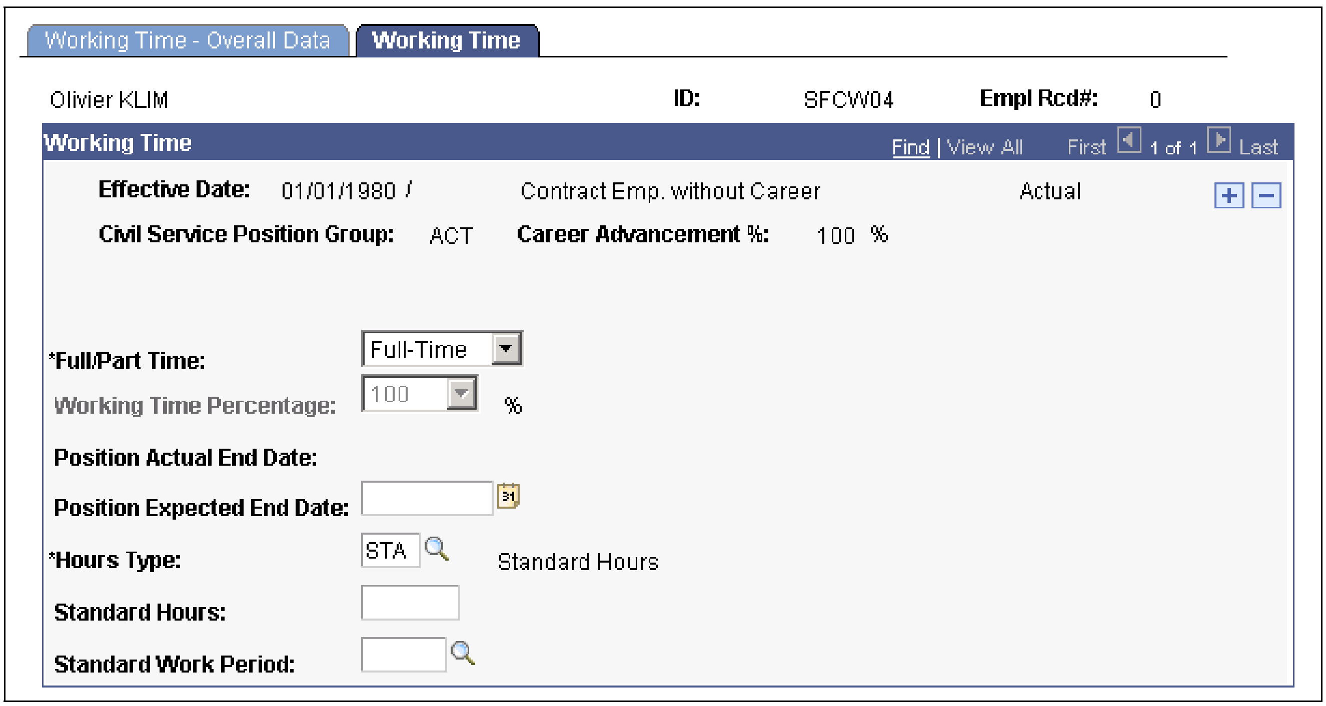
This section discusses how to track an employee's work time.

Pages Used to Manage Work Time

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

Tracking an Employee's Working Time

Access the Working Time page.



Working Time page

Full//Part Time Indicate if the employee is full-time or part-time.

Working Time Percentage Select a working-time percentage for part-time employees.

Position Actual End Date Displays the next row's effective date, minus 1 day.

Position Expected End Date Enter an expected end date. This field is either required or optional, depending on the action that you have set up.

Hours Type Enter the type of hours; for example, *STA* (standard hours).

Standard Hours Select the number of hours that the employee works per standard work period.

Standard Work Period Select the length of the standard work period, such as a weekly.

Managing Employee Categorization

This section discusses how to manage employee categorization.

Pages Used to Manage Employee Categorization

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

Managing Seniority Bonuses

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

Understanding Seniority Bonus Management

Review these considerations for managing seniority bonuses:

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

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

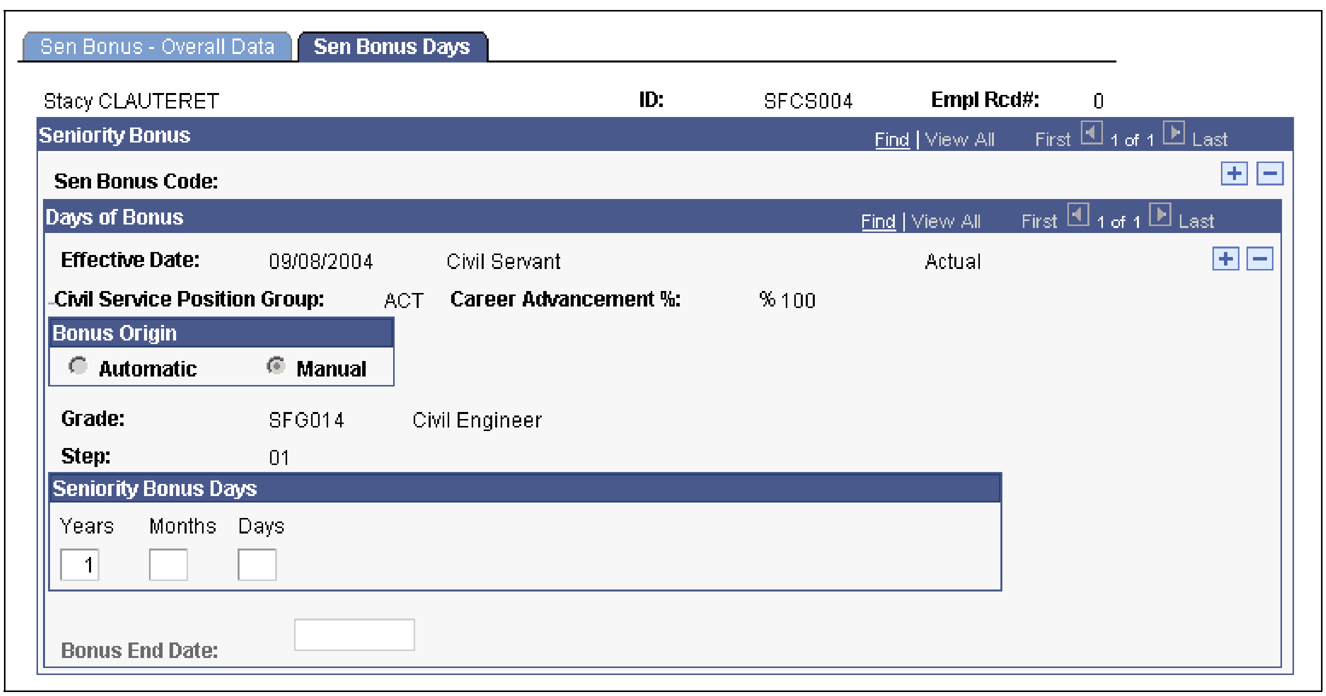
Note. Day bonuses reduce the seniority that is necessary before step increment but they do not reduce the seniority necessary before substep increment.

Pages Used to Manage Seniority Bonuses

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

Assigning Day Bonuses

Access the Sen Bonus Days page.



Sen Bonus Days page

Enter the seniority bonus days and the bonus end date.

Managing Absences

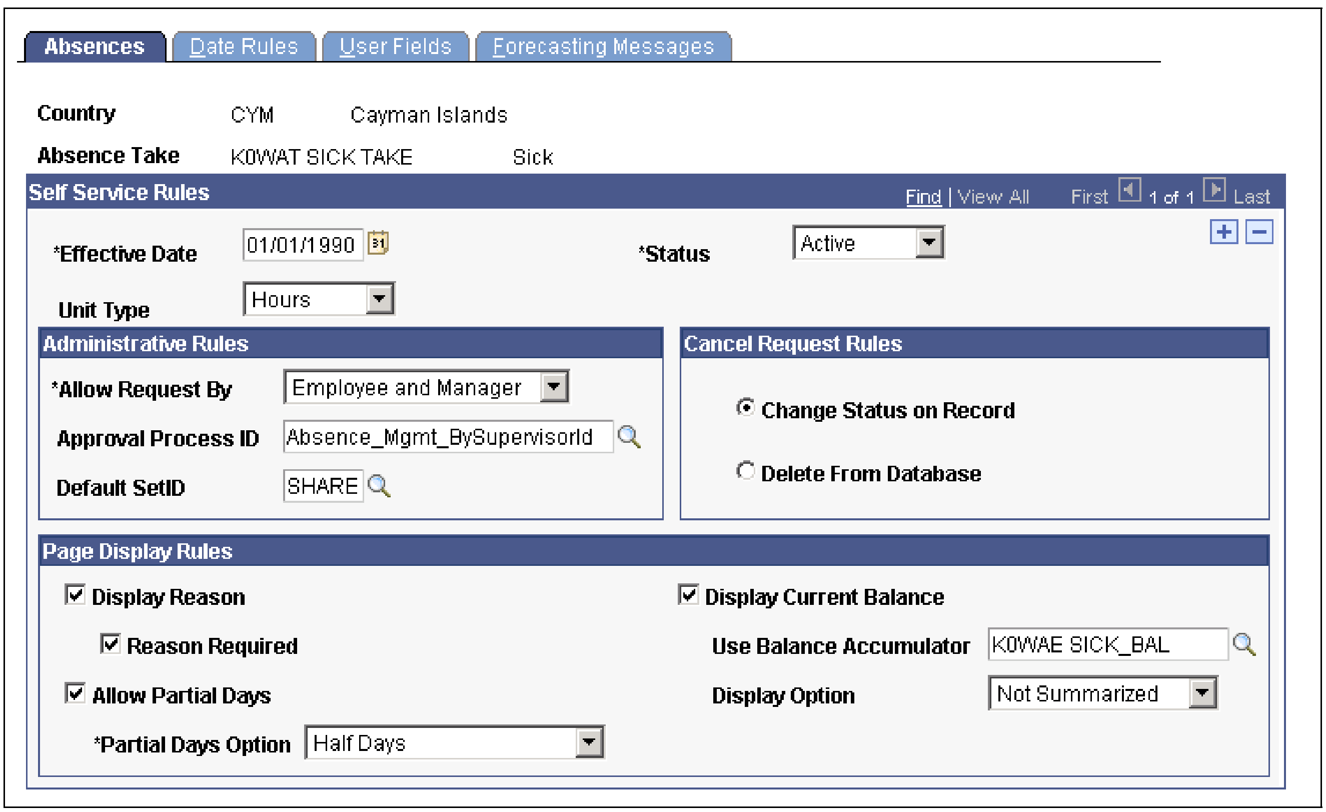
This section discusses how to track an employee's absences.

Pages Used to Manage Absences

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

Tracking an Employee's Absences

Access the Absences page.



Absences page

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

To track absences:

1. Enter the Position Expected End Date field.

Depending on the action and its setup, this field can be required or optional.

2. Enter the number of renewals and the duration of the absence in days.
3. If necessary, enter a comment.

Tracking Supporting Documents

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

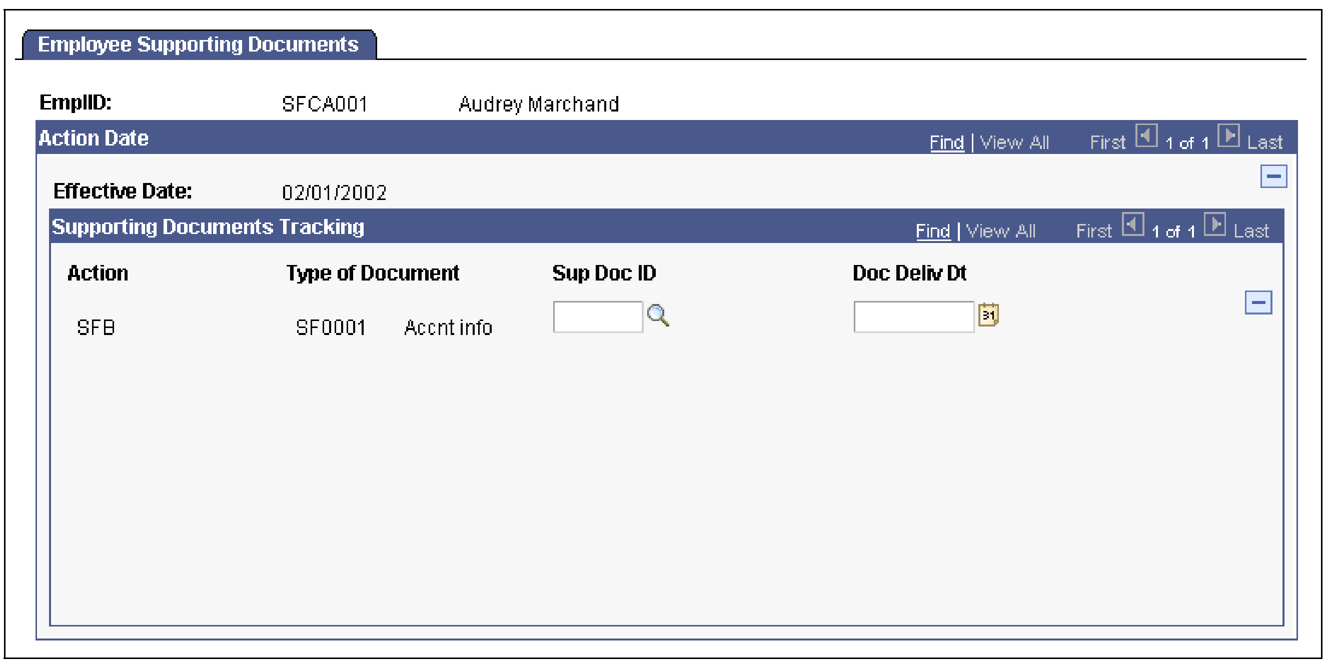
This section discusses how to track supporting documents.

Page Used to Track Supporting Documents

Page Name	Object Name	Navigation	Usage
Employee Supporting Documents	FPAEESUPDOC_PNL	Workforce Administration, Job Information, French Public Sector Jobs, Supporting Documents FPS	Track an employee's supporting documents.

Tracking Supporting Documents

Access the Employee Supporting Documents page.



Employee Supporting Documents page

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

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

Reviewing Employee Data

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

Pages Used to Review Employee Data

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

Page Name	Object Name	Navigation	Usage
Work Time Storage 1	FPAEEWORHIST_PNL1	Workforce Administration, Job Information, Review Job Information, Work Time Archive FPS, Work Time Storage 1	View an employee's previous work time data.
Work Time Storage 2	FPAEEWORHIST_PNL2	Workforce Administration, Job Information, Review Job Information, Work Time Archive FPS, Work Time Storage 2	View an employee's previous work time data.
EE Categorization Storage 1 (employee categorization storage 1)	FPAEEOTHHIST_PNL1	Workforce Administration, Job Information, Review Job Information, EE Categorization Archive FPS, EE Categorization Storage 1	View an employee's previous categorization data.
EE Categorization Storage 2 (employee categorization storage 2)	FPAEEOTHHIST_PNL2	Workforce Administration, Job Information, Review Job Information, EE Categorization Archive FPS, EE Categorization Storage 2	View an employee's previous categorization data.
CS Position Storage 1 (civil service position storage 1)	FPAEELEGHIST_PNL1	Workforce Administration, Job Information, Review Job Information, CS Position Archive FPS, CS Position Storage 1	View an employee's previous civil service positions.
CS Position Storage 2 (civil service position storage 2)	FPAEELEGHIST_PNL2	Workforce Administration, Job Information, Review Job Information, CS Position Archive FPS, CS Position Storage 2	View an employee's previous civil service positions.
Sen Bonus Storage 1 (seniority bonus storage 1)	FPABONHIST_PNL1	Workforce Administration, Job Information, Review Job Information, Seniority Bonus Archive FPS, Sen Bonus Storage 1	View an employee's previous seniority bonus data.
Sen Bonus Storage 2 (seniority bonus storage 2)	FPABONHIST_PNL2	Workforce Administration, Job Information, Review Job Information, Seniority Bonus Archive FPS, Sen Bonus Storage 2	View an employee's previous seniority bonus data.
Premiums Storage 1	FPAEEPREMHST_PNL1	Workforce Administration, Job Information, Review Job Information, Premium Archive FPS, Premiums Storage 1	View an employee's previous premium data.

Page Name	Object Name	Navigation	Usage
Premiums Storage 2	FPAEEPREMHST_PNL2	Workforce Administration, Job Information, Review Job Information, Premium Archive FPS, Premiums Storage 2	View an employee's previous premium data.
Name History	FPAPERS_DT_HIST_1	Workforce Administration, Job Information, Personal Data Deleted ID FPS, Name History	View name information retained after deleting an employee ID.
Address History	FPAPERS_DT_HIST_1B	Workforce Administration, Job Information, Personal Data Deleted ID FPS, Address History	View address information retained after deleting an employee ID.
Personal History	FPAPERS_DT_HIST_2	Workforce Administration, Job Information, Personal Data Deleted ID FPS, Personal History	View personal information retained after deleting an employee ID.
ID History	FPAPERS_DT_HIST_3	Workforce Administration, Job Information, Personal Data Deleted ID FPS, ID History	View ID information retained after deleting an employee ID.
Employee Personal File Cncl (employee personal file cancel)	FPAEELEGAL_HIST3	Workforce Administration, Job Information, Employee File Cncl FPS	View employee record information retained after deleting an employee ID.

CHAPTER 6

Rating Employees

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

- Prepare employee rating lists.
- Calculate employee ratings.

Understanding Employee Ratings

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

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

Attendance time is evaluated:

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

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

Then reviewers manually enter temporary ratings using Manage Employee Reviews.

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Employee Reviews

Preparing Employee Rating Lists

This section discusses how to:

- Select the period and group of employees.
- Edit the list of employees to be rated.

Prerequisites

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

See Also

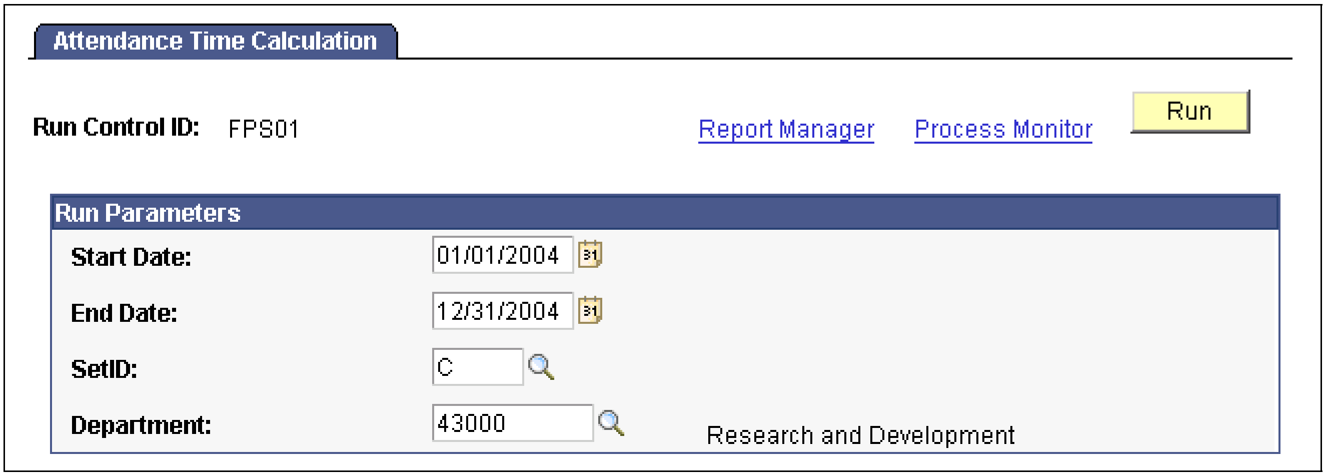
Chapter 16, “Merging French Public Sector and Human Resources Files,” page 161

Pages Used to Prepare Employee Rating Lists

Page Name	Object Name	Navigation	Usage
Attendance Time Calculation	RUNCTL_FPA1200	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Calculate Attendance Time FPS	Run the Employees to be Rated SQR process (FPA1200). You select the period and group of employees for which to calculate attendance time. You must run the this process before you can generate a list of employees to be rated.
Attendance Time	FPA_RATPRS	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Attendance Time FPS	View attendance time calculation results.
List of Employees to be Rated	RUNCTL_FPA1210	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Empl to be Rated Report FPS	Run the Employee/Department List (FPARAT2) or the Employee ID List (FPA_RAT) reports. These reports create a list of employees who meet attendance time requirements.

Selecting the Period and Group of Employees

Access the Attendance Time Calculation page.



Attendance Time Calculation page

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

SetID and **Department** — Select the setID and department of the group of employees for which to calculate attendance days.

Note. Attendance time is calculated in thirtieths.

Editing the List of Employees to be Rated

Access the List of Employees to be Rated page.

List of Employees to be Rated page

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

Report Information

Click Run to run the report. From the Process Scheduler Request page you can select two reports:

- Employees/Department List (FPARAT2) lists employees to be rated by employee ID/department.
- Employee ID List (FPA_RAT) lists employees to be rated by employee ID.

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

Calculating Employee Ratings

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

This section discusses how to:

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Employee Reviews

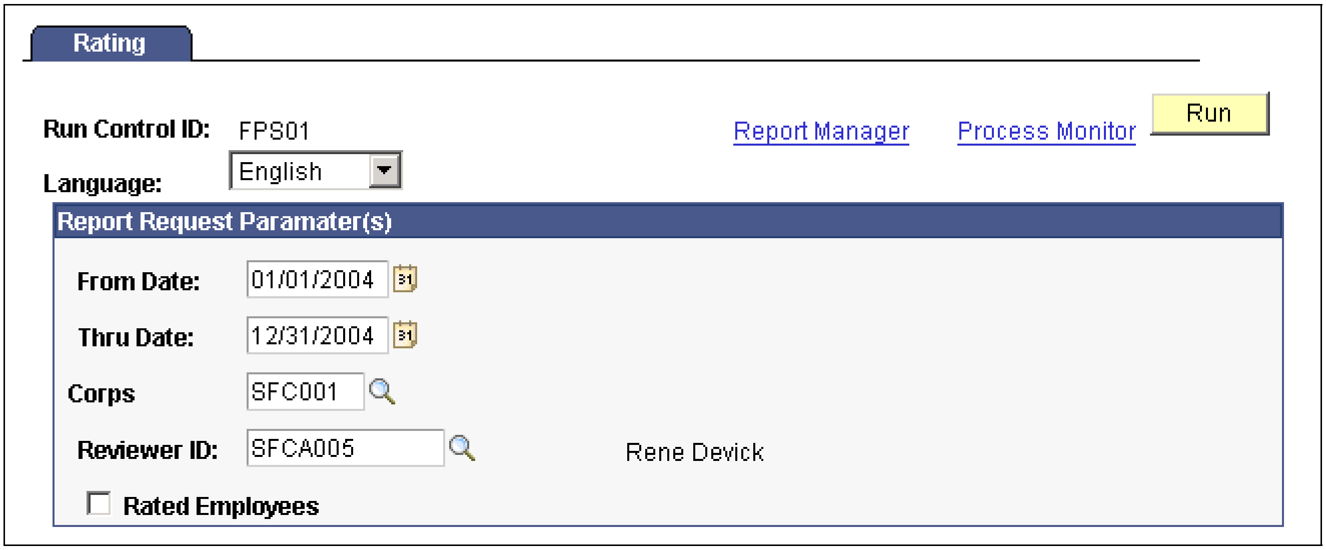
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments"

Pages Used to Calculate Employee Ratings

Page Name	Object Name	Navigation	Usage
Rating	RUNCTL_FPA025	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Evaluation Status FPS	Run the Assessment Statuses report (FPA025) that lists selected employees and whether they have been rated. Use this report to determine which employees have not been rated.
Adjustment Constant	RUNCTL_FPA030	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Calc Adjustment Constant FPS	Run the Adjustment constant calcul. (adjustment constant calculation) report (FPA030). This report calculates the adjustment constant for each reviewer for one or more corps.
Final Rating	RUNCTL_FPA035	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Final Rating FPS	Calculate the final rating.
Final Rating Results	FPA_FINRA_RSL_T_PNL	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Review Rating Prces Results FPS	View the final rating results.

Determining Which Employees Have Not Been Rated

Access the Rating page.



Rating page

From Date and **Thru Date** Select the rating period.

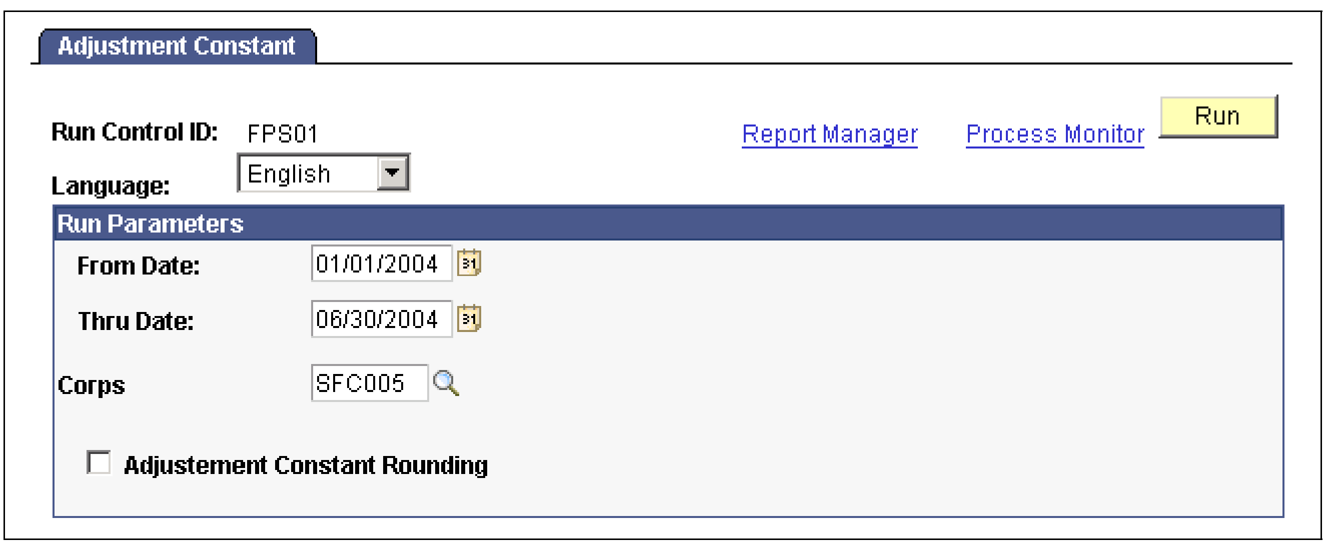
Corps Select a corps to include only employees of that corps or leave the field blank to include all corps.

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

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

Calculating the Adjustment Constant

Access the Adjustment Constant page.



Adjustment Constant page

From Date and **Thru Date** Select the rating period.

Corps	Select a corps if you want to calculate the adjustment constant for that corps only. Leave the field blank to calculate the adjustment constant for all corps.
Adjustement Constant Rounding	Select to have the adjustment constant rounded to multiple of .25 (for example, 1.25, 1.50, or 1.75).

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

Calculating the Final Rating

Access the Final Rating page.

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

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

CHAPTER 7

Processing Trainee Tenure

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

- Calculate tenure dates.
- Search for employees who are eligible for tenure.
- Inform supervisors.
- Approve and deny probation periods.
- Grant tenure.
- View employee status.

Understanding the Tenure Process

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

Prerequisites

The tenure process uses parameters from the following tables:

- FPS Installation Parameters
- Civil Service Position
- Grades

See Also

Chapter 3, "Setting Up French Public Sector Tables," page 7

Calculating Tenure Dates

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

Understanding Tenure Date Calculation

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

The system considers:

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

  Length is determined when you set up the trainee's grade.
- The civil service positions held during the probation period.

  Some civil service positions can suspend the tenure probation period and postpone the probation period end date.
- The work time percentage for trainees who work part time.

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

See Also

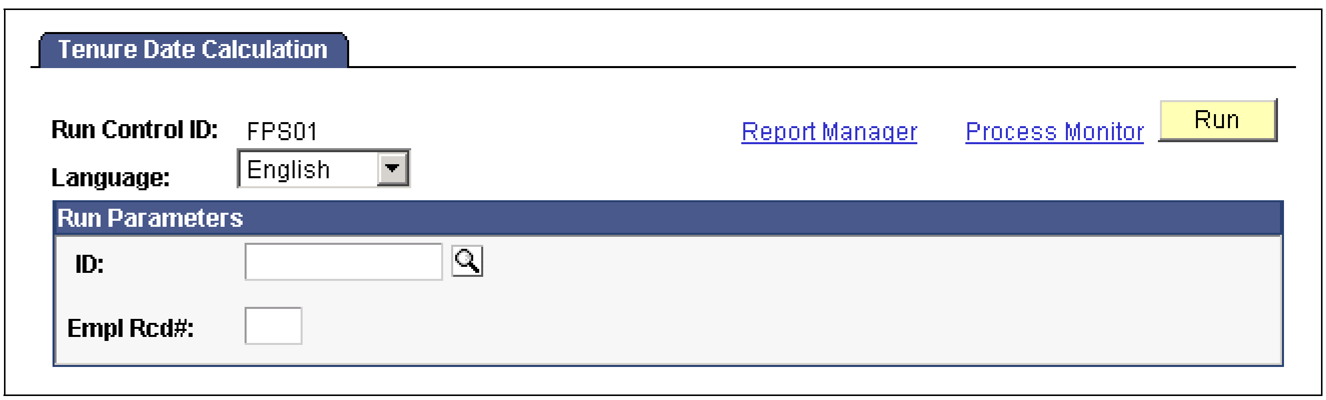
Chapter 3, "Setting Up French Public Sector Tables," Setting Up FPS Installation Parameters, page 25

Page Used to Calculate Tenure Dates

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

Calculating Tenure Dates

Access the Tenure Date Calculation page.



Tenure Date Calculation page

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

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

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

See Also

Chapter 5, "Updating Employee Records," Entering Career Classification Data, page 76

Searching for Employees Who Are Eligible for Tenure

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

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

Page Used to Search for Employees Who Are Eligible for Tenure

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

Informing Supervisors

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

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

Page Used to Inform Supervisors

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

Approving and Denying Probation Periods

This section provides an overview of probation period approval or rejection and discusses how to validate or reject the tenure probation period.

Understanding Probation Period Approval or Rejection

Trainee Validation is a transaction process that enables a trainee’s supervisor to select one of these:

- Validate the tenure probation period.
- Renew the probation period (once).
- Refuse the trainee.

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

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

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

Pages Used to Approve and Deny Probation Periods

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies, "Performing Gap and Match Analyses on a Workforce," Matching Roles to Employees

Validating or Rejecting the Tenure Probation Period

Access the Tenure PPd Validation page.

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

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

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

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

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

Granting Tenure

You must grant tenure to make the tenure effective.

This section provides overviews of the rows created when saving the Assign Civil Servant Status component and tenure actions with or with out step increment and discusses how to:

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

Understanding Rows Created When Saving the Assign Civil Servant Status Component

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

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

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up FPS Installation Parameters, page 25

Understanding Tenure Actions with or without Step Increment

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

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," Assigning FPS Components That Can Use the Action, page 17

Pages Used to Grant Tenure

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies, “Performing Gap and Match Analyses on a Workforce,” Matching Roles to Employees

Granting Tenure

Access the Tenure page.

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

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Setting Up FPS Installation Parameters, page 25

Entering the New Employee Status Code

Access the New Status page.

Enter the new employee status code.

The category is Civil Servant.

Viewing Employee Status

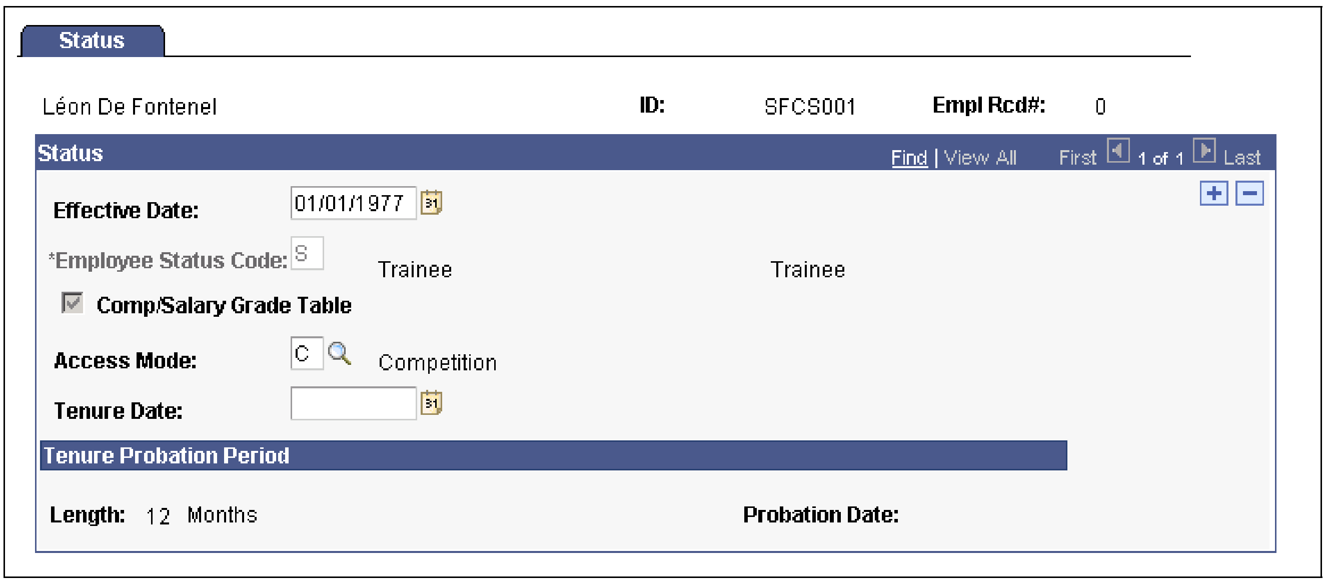
This section discusses how to view employee status.

Page Used to View Employee Status

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

Viewing Employee Status

Access the Status page.



Status page

The page displays probation period lengths and end dates.

Probation Period Renewal

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

CHAPTER 8

Managing the Promotion Probation Period

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

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

Understanding Promotion Probation Period Setup

Promotion probation period functionality uses the following setup data:

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

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up FPS Installation Parameters, page 25

Chapter 3, "Setting Up French Public Sector Tables," Defining Civil Service Positions, page 10

Chapter 3, "Setting Up French Public Sector Tables," Setting Up Salary Grades, page 35

Chapter 4, "Hiring French Public Sector Employees," Entering Career Classification Information, page 60

Assigning a Promotion Probation Period

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

To set up a grade promotion implying a corps change:

1. Access the Career - Overall Data page in the Increment Step/Promotion FPS component and insert a new row. Use Grade Promotion as the action.
2. Access the Career-Classification page in the Increment Step/Promotion FPS component.

3. Select the Trainee check box to indicate that the employee is beginning a probation period.

   This check box appears only for employees who are not trainees.

4. Set the probation period to *In Progress.*

See Also

Chapter 12, "Processing Grade Promotions," page 135

Calculating Promotion Probation Period End Dates

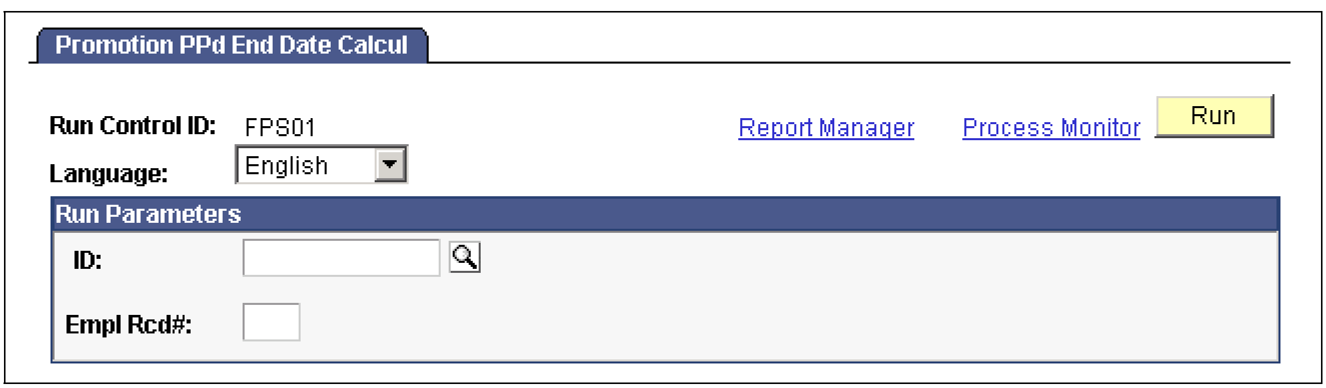
This section discusses how to calculate promotion probation period end dates.

Pages Used to Calculate Promotion Probation Period End Dates

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

Calculating Promotion Probation Period End Dates

Access the Promotion PPd End Date Calcul page.



Promotion PPd End Date Calcul page

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

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

This SQR process:

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

  Length is determined when you set up the new grade.
- Considers the civil service positions that are held by an employee during the probation period.

  Some civil service positions can suspend the promotion probation period and postpone the probation period end date.
- Considers the work-time percentage for a part-time employee.
- Displays the Period End Date on the Career-Classification page.

Validating or Denying Promotions

At the end of the promotion probation period, you must validate or deny the promotion. This section discusses how to:

- Validate a promotion
- Deny a promotion

Prerequisites

Before you can validate or deny a promotion, you must have run the End Date Calculation process (FPA305) that calculates the promotion probation period end date.

Validating a Promotion

To validate a promotion:

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

See Also

Chapter 5, "Updating Employee Records," Entering Career Classification Data, page 76

Denying a Promotion

To deny a promotion:

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

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

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

See Also

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

CHAPTER 9

Calculating Seniority and Length of Service

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

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

Understanding Seniority and Length of Service

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

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

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

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

This explains how and length of service calculations for steps, grades, corps and categories relate to each other:

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

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

Career Advancement Percentages

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

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

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," Defining Civil Service Positions, page 10

Seniority Credits

Seniority credits are applied only within the step.

Reduction in Step Duration

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

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

Seniority Carryover at Step Increments in the Same Grade

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

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

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

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

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

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

See Also

Chapter 13, "Administering Reclassification," page 141

Prerequisites

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

- FPS Installation Parameters.

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

- Civil Service Position.

  Define the Seniority and Service Length Career Advancement Percentages for each civil service position.
- Salary Grade Table - Steps.

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

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," page 7

Calculating Seniority and Length of Service

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

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

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

Understanding How Seniority Definitions Account for Steps Not Terminated

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

- Actual step seniority accrues.
- Reductions in step duration granted for the grade and step are accrued in Step Career Seniority.

  All reductions in step duration are retrieved in the first step row. Step Career Seniority is calculated by row.
- No seniority is carried over.
- Credited Seniority is equal to the credited seniority in the step, plus the previous instance career seniority.

Pages Used to Calculate Seniority and Length of Service

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

Starting the Seniority Calculation

Access the Seniority Calculation page.

To calculate seniority:

1. Enter the run parameters.

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

Seniority and Length of Service Calculation

The results of the process enable you to determine, for each move recorded in an employee career:

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

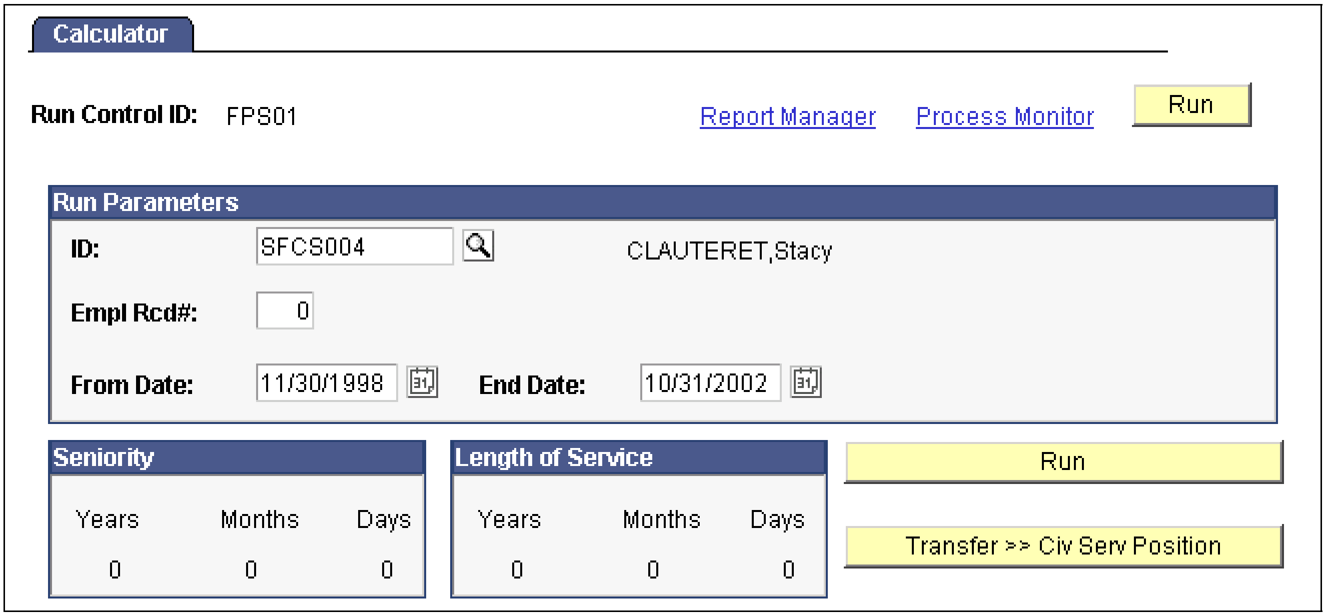
This seniority corresponds to the theoretical career seniority that you define when you set up the step.

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

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

Calculating Seniority and Length of Service

Access the Calculator page.



Calculator page

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

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

Viewing Seniority Information

This section discusses how to view seniority information.

Page Used to View Seniority Information

Page Name	Object Name	Navigation	Usage
Career Seniority	FPAEESENSYNT_PNL	• Workforce Administration, Job Information, Review Job Information, Career Seniority FPS • Workforce Administration, Collective Processes, Manage Advancement FPS, Review Career Seniority	View seniorities that are associated with each employee career status. The system displays the various seniorities and lengths of service calculated for each action according to the definitions and rules that are explained in this chapter. With the step seniority and length of service, the step career seniority and theoretical seniority are displayed. **Note.** You can select only employees with career management data when entering this page.

CHAPTER 10

Processing Career Advancement

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

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

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

Understanding the Career Advancement Processes

The global advancement process exists in three forms:

- Advancement date calculation SQR process (FPA005).

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

- Advancement processing.

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

- Advancement simulation.

  Enables you to simulate future automatic step or substep increments.

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

Prerequisites

All automatic step increment processes use the following tables:

- FPS Installation Parameters.

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

- Status/Population Codes.

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

- Salary Grade Table - Steps.

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

- Civil Service Positions.

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

See Also

Chapter 3, "Setting Up French Public Sector Tables," page 7

Calculating Step Increment Dates

This section provides an overview of the Advancement Date Calculation SQR process (FPA005) and discusses how to calculate step increment dates.

Understanding the Advancement Date Calculation Process (FPA005)

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

Once it has started, the process considers:

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

The calculation does not consider part-time work.

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

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

See Also

Chapter 9, "Calculating Seniority and Length of Service," page 121

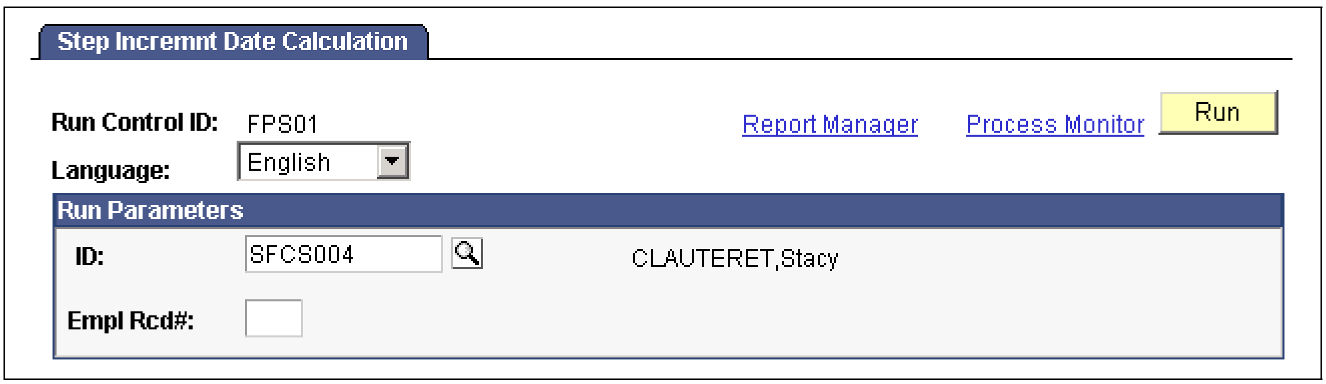
Chapter 5, "Updating Employee Records," Managing Career Data, page 74

Page Used to Calculate Step Increment Dates

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

Calculating Step Increment Dates

Access the Step Incremnt Date Calculation page.



Step Incremnt Date Calculation page

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

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

This page launches the Advancement Date Calculation process (FPA005).

Searching for Next Advancements

This section provides an overview of searching for next advancements and lists the pages used to search for next advancements.

Understanding How to Search for Next Advancements

The system enables you to search for employees whose advancement date falls within a specific period after you run the Advancement Date Calculation process (FPA005). You define this period in the Days Before (Sub) Step Increment field in the FPS Installation Parameters component.

The Employees to be Advanced SQR process (FPA310):

- Activates the Advancement Flag for employees whose advancement date is between the system date and the duration that is defined in the setup.

  For example, if the duration is 30 days, the advancement flag is activated for all employees whose advancement date is expected within 30 days after processing.
- Considers only employees whose current statuses and steps or substeps authorize automatic advancement and whose civil service positions on the expected advancement dates authorize automatic advancement.
- Accounts for PeopleSoft Enterprise HRMS security rules.

  The system defines the department and employee scope that are affected by the process, depending on the user's ID code.

After each processing, employees that are to be advanced are listed in the FPA310.LIS file.

Pages Used to Search for Next Advancements

Page Name	Object Name	Navigation	Usage
Next Step Increment	RUNCTL_FPA710	Workforce Administration, Collective Processes, Manage Advancement FPS, Next Step Increment	Activate the advancement flag depending on FPS Installation Parameters and Step Increment Date.
Reset Date and Adv Flag (reset date and advancement flag)	PRCSRUNCNTL	Workforce Administration, Collective Processes, Manage Advancement FPS, Reset Advancement Dates	Reset advancement dates and advancement flags. Reset the test process.

Calculating Collective Advancement

This section provides an overview of collective advancement and lists the pages used to calculation collective advancement.

Understanding Collective Advancement

Using the Step Increment SQR process (FPA320), you can automatically move all employees whose Advancement Flag has been activated. Before launching this process, indicate which corps to run the process for.

The process updates the employees' Career records. A new row is inserted with the following field values:

- The Effective Date is the expected advancement date.
- The Action and Reason codes are defined in the FPS Installation Parameters table for step or substep increments.
- The step or substep is the Next Step for Advancement that is defined in the Step table.

Pages Used to Calculate Collective Advancement

Page Name	Object Name	Navigation	Usage
Automatic Step Increment	RUNCTL_FPA320	Workforce Administration, Collective Processes, Manage Advancement FPS, Automatic Step Increment	Launch the Automatic Step Increment process (FPA001) to move all employees with an activated Advancement Flag. The Automatic Step Increment process (FPA001) combines two SQR processes, Employees to be Promoted process (FPA310) and the Step Increment process (FPA320).
Step Increment	RUNCTL_FPA320	Workforce Administration, Collective Processes, Manage Advancement FPS, Step Increment	Start the Step Increment process (FPA320).

Advancing Employees Manually

To advance employees manually:

1. Access the Career - Classification page.
2. Click the Step Increment button.

   This button appears after you launch the advancement calculation date and next step increment processes. The system inserts a new row with the following data:

   - The effective date—the increment date that is calculated by Advancement Date Calculation process (FPA005).
   - The action—the action for (sub)step increment that is defined by the FPS Installation Parameters.
   - The step—the next (sub)step for increment that is defined by the Salary Grade Table - Steps page.
3. Save the data.

Simulating Advancement

This section provides an overview of simulating advancement and lists the pages used to run simulations.

Understanding Simulating Advancement

Run the Advancement Simulation SQR process (FPA010) to simulate future automatic step increments.

You must first calculate the advancement dates and select the period to be examined. Otherwise, the system simulates advancement for all dates that are available in the database. You can simulate advancement for a corps or an employee. The employee’s status and civil service position must authorize advancement. Simulations are stored on the Career 2 table.

After each process, the career statuses of employees after advancement simulation are listed in the FPA010.LIS file. Run the Career Simulation report to print a list of simulated career data.

Pages Used to Run Simulations

Page Name	Object Name	Navigation	Usage
Step Increment Simulation	RUNCTL_FPA010	Workforce Administration, Collective Processes, Manage Advancement FPS, Step Increment Simulation	Start the Advancement Simulation SQR process (FPA010).
Delete Simulation Data	PRCSRUNCNTL	Workforce Administration, Collective Processes, Manage Advancement FPS, Delete Simulation Records	Clear the advancement simulations.
Reset Date and Adv Flag (reset date and advancement flags)	PRCSRUNCNTL	Workforce Administration, Collective Processes, Manage Advancement FPS, Reset Adv Dates	Reset the date and advancement flags created by your simulations.
Career Simulation	RUNCTL_FPACRYSTAL3	Workforce Administration, Collective Processes, Manage Advancement FPS, Career Simulation Report	Run the Career Simulation report (FPA_CARB) that lists the simulated career data after reclassification or simulation of step increment.

See Also

Chapter 13, “Administering Reclassification,” page 141

CHAPTER 11

Running the Retroactivity Process

This chapter provides an overview of retroactivity in Manage French Public Sector and discusses how to run the retroactivity process.

Understanding Retroactivity in Manage French Public Sector

Retroactivity is a way to manage the impact of inserting or deleting an action with an old effective date. An old effective date is an effective date older than the highest effective date in the employee's career data. This process consists of three steps:

- Deleting obsolete moves.
- Processing abrogation.
- Reconstituting career data.

Each time that a retroactive move is recorded during a Career transaction, the system activates a retroactivity flag on the employee record. A message indicates when a retroactive move has been inserted or deleted.

The Retroactivity SQR process (FPA600) searches for the retroactivity flags and:

- Deletes previous actions that are obsolete following the retroactive move.

  The process deletes moves until the action ending the process is reached. If no action ending the process is met, the process deletes all the moves, including projected moves that might have already been recorded.
- Suspends bonuses that have been granted for a deleted grade or step.
- Generates abrogation for deleted events, if necessary.

  If the order related to an event has been edited, when the event is deleted, it has to be abrogated (an abrogation order needs to be edited).
- Restores the employee career.

  The objective is to generate the automatic step increments that must occur after a retroactive move. The reconstitution consists of calculating advancement dates and moving employees. Both processes occur as many times as needed until the action ending the process is reached or until today's date (projected moves are not reconstituted).
- Processes the suspended bonuses, while the reconstitution runs:
  - If the employee is still in the same step where the bonus was granted, the bonus is regranted.
  - If the employee is no longer in the same step where the bonus was granted, you must manually grant the bonus.

    A reassignment button appears on the Seniority Bonus Days page. Depending on the employee's career status, you can either reassign the bonus (for a projected bonus) or delete it.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Setting Up Retroactivity Rules, page 22

Running the Retroactivity Process

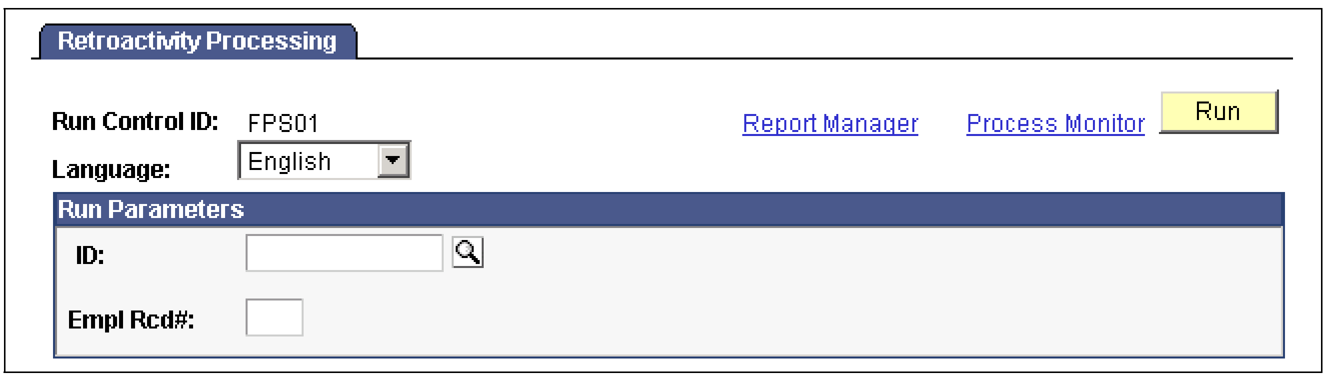
This section discusses how to start retroactive processing.

Page Used to Run the Retroactivity Process

Page Name	Object Name	Navigation	Usage
Retroactivity Processing	RUNCTL_FPA005	Workforce Administration, Collective Processes, Manage Advancement FPS, Retroactivity Processing	Start retroactive processing.

Starting Retroactive Processing

Access the Retroactivity Processing page.



Retroactivity Processing page

To start retroactive processing, enter the run parameters and click Run. If you don’t select an employee ID, the process applies to all employees with an active retroactive flag.

CHAPTER 12

Processing Grade Promotions

This chapter provides an overview of grade promotions and discusses how to select and edit promotable employees.

Understanding Grade Promotions

A grade promotion is a grade increase within the same corps. Generally, advancement is on merit. The promoted employees appear on an annual advancement table that is established with the consent of the appropriate committee.

The promotable employee functionality consists of the following steps:

- Establishing promotion criteria.
- Listing employees that are promotable according to your criteria.

  This list is stored, but it can be modified.
- Storing and editing the list of promotable employees.

  The career administrator can define additional criteria based on previous employee ratings. These changes are made online and are not stored.

Selecting and Editing Promotable Employees

This section discusses how to:

- Define promotion criteria.
- Select promotable employees.
- Edit the promotable employee list.
- Run the Promotable Employees report.
- Define the simulation criteria.

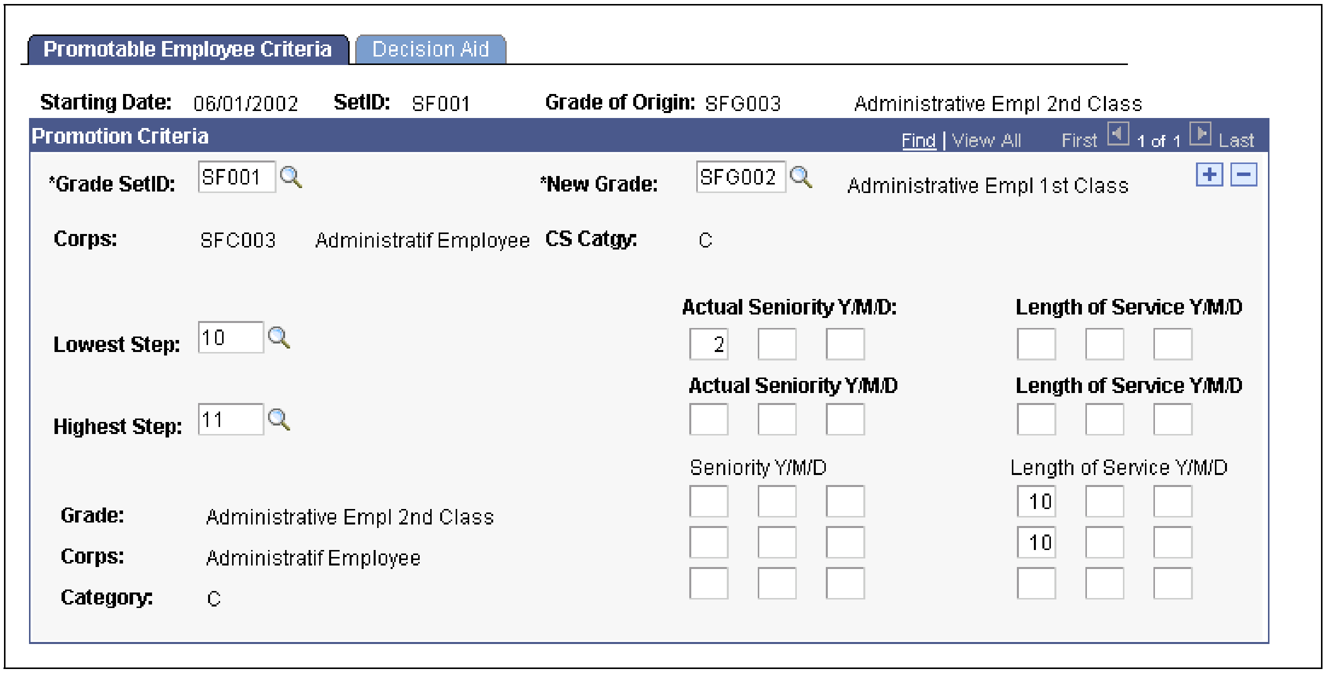
Pages Used to Select and Edit Promotable Employees

Page Name	Object Name	Navigation	Usage
Promotable Employee Criteria	FPMPROMTABL_PNL	• Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Define Promotion Rules, Promotable Employee Criteria • Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Promotable Empl Criteria, Promotable Employee Criteria	Define promotion criteria.
Promotable Empyees (promotable employees)	RUNCTL_FPA800	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Select Promotable Employees	Select the promotable employee population by running the Extract Promotable Employees SQR process (FPA800).
Promotable Employees	FPAEEPROM_PNL	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Review Promotable Employees, Promotable Employees	View details of employees who were selected for promotion. This page displays details of one employee at a time and you can scroll through each employee's information. The second Promotable Employees page in the component displays a summary list of employees selected for promotion.
Promotable Employees	FPAEEPROMGRID_PNL	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Review Promotable Employees, Promotable Employees	View and edit the list of employees that are selected for promotion.
Promotable Employees Edit	RUNCTL_FPAPROM	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Promotable Employees Report	Run the Promotable Employees report.

Page Name	Object Name	Navigation	Usage
Decision Aid	FPMPROMTABL2_PNL	• Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Define Promotion Rules, Decision Aid • Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Promotable Empl Criteria, Decision Aid	Define simulation criteria.
Review Promotable Employees - Decision Aid	FPAEEPROM01_PNL	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Review Promotable Employees, Decision Aid	View details of employees who were selected in the promotion simulation. This page displays details of one employee at a time and you can scroll through each employee's information. The second Decision Aid page in the component displays a summary list of employees selected in the promotion simulation.
Review Promotable Employees - Decision Aid	FPAEEPROM02_PNL	Workforce Administration, Collective Processes, Identify Promotable Empls FPS, Review Promotable Employees, Decision Aid	View the list of employees that are selected in the promotion simulation.

Defining Promotion Criteria

Access the Promotable Employee Criteria page.



Promotable Employee Criteria page

To define promotion criteria:

1. Enter the grade after promotion.
2. Enter the statutory criteria for step and seniority.

Each criterion is optional.

Selecting Promotable Employees

Access the Select Promotable Employees page.

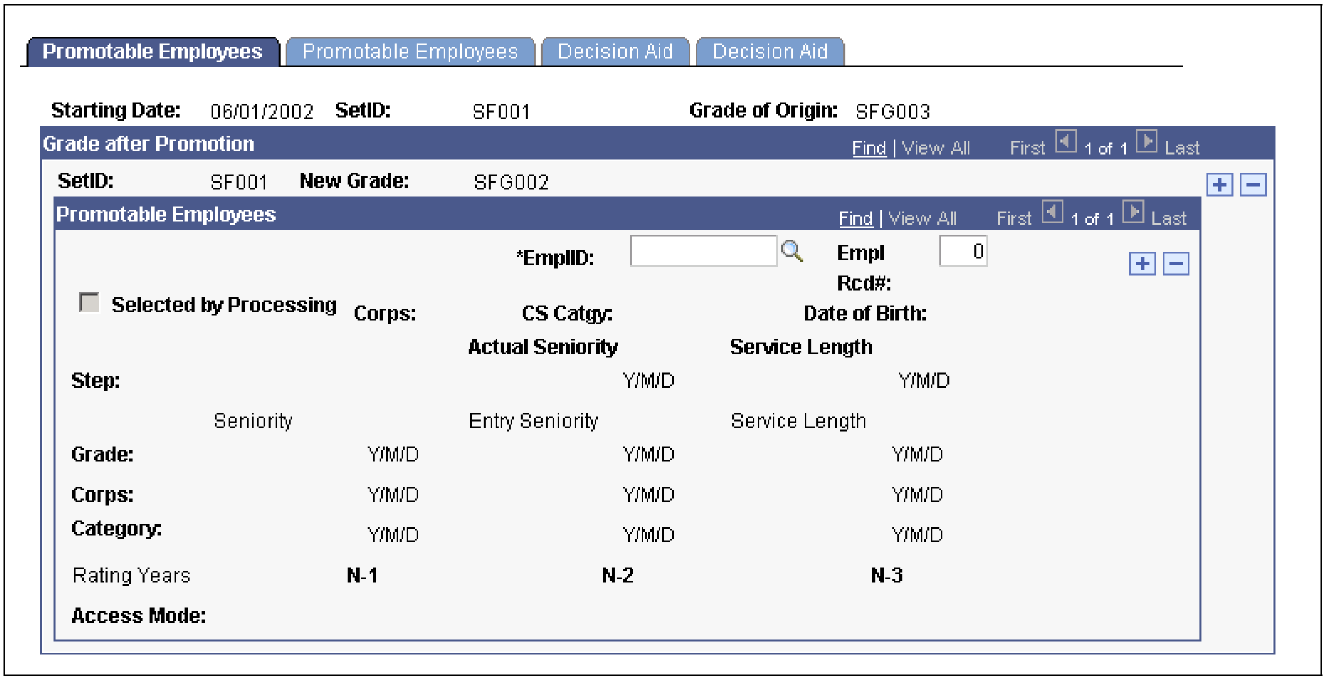
To create a list of promotable employees, enter the starting date (date of eligibility for promotion) and the grade of origin.

Note. The starting date is the date used to calculate seniority.

The Extract Promotable Employees SQR process (FPA800) creates a list of promotable employees according to statutory criteria. This list is stored, but it can be modified.

Editing the Promotable Employee List

Access the Promotable Employees page.



Promotable Employees page

Review the list of promotable employees. You can add or delete employees to include in the Promotable Employee report.

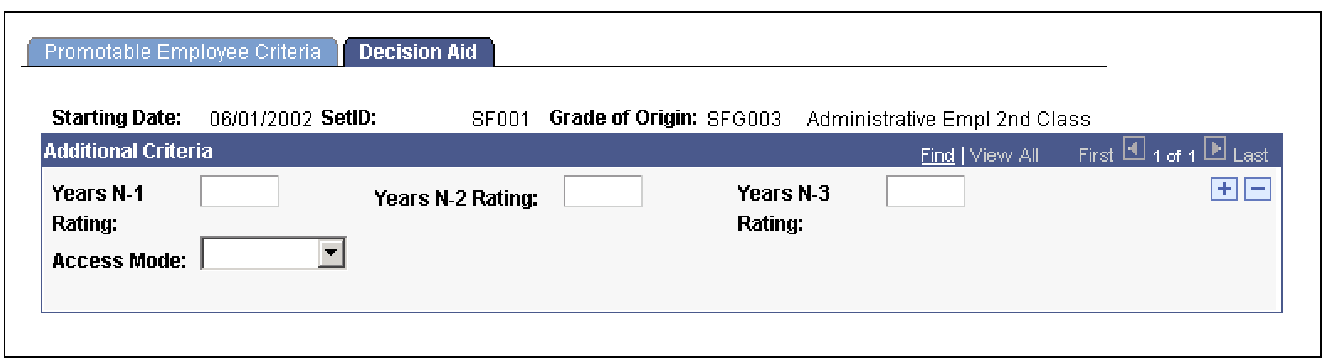
Running the Promotable Employees Report

Access the Promotable Employees Edit page.

Enter the starting date and run the Promotable Employees report (FP_PROM). This report lists the employees promotable by a given date. You must run the Extract Promotable Employees process (FPA800) before running this report.

Defining the Simulation Criteria

Access the Decision Aid page.



Decision Aid page

Enter data to refine the selection of promotable employees. Simulation criteria are optional.

The simulation criteria you enter on this page affects the simulation data displayed in the Review Promotable Employees component.

Note. The system never stores the list of employees resulting from the simulation in the database.

Years N-1 Rating, Years N-2 Rating, and **Years N-3 Rating**	Enter the minimum rating you want the employee to have received in the previous year (n-1), two years before the current year (n-2), and three years before the current year (n-3).

CHAPTER 13

Administering Reclassification

This chapter provides an overview of reclassification and discusses how to:

- Set up the reclassification process.
- Process reclassification simulations.
- Validate reclassifications.
- Process career updates.

Understanding Reclassification

The objective of reclassification is to update career data with changes stemming from a change in the employee's grade and step.

The process determines which employees meet the conditions to access a new grade/step within a particular time frame either prior to the reclassification date or during the period between the reclassification date and the application administration date. The reclassification date is the effective date of the Reclassification table.

The reclassification process includes several steps:

- Defining the reclassification conditions and procedures on the reclassification chart.
- Simulating reclassification and saving the results in a temporary table.
- Validating reclassifications, collectively or individually.
- Inserting valid reclassifications into the employee records.

Setting Up the Reclassification Process

The reclassification process relies on the reclassification ID. This ID establishes which circumstances result in reclassification and the effects of the reclassification. This data is stored in the Reclassification table.

This section discusses how to:

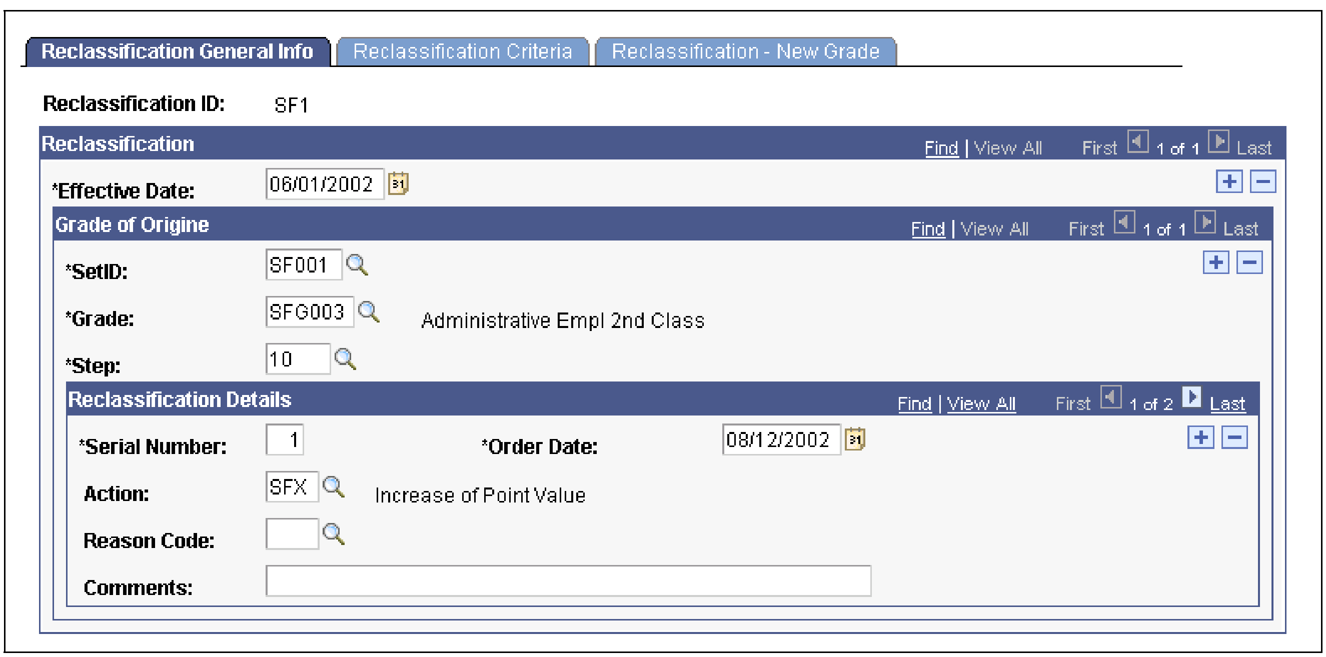
- Specify the grade, step, action, and reason that are required for reclassification.
- Enter the requirements for reclassification.
- Enter the grade and step after reclassification.

Pages Used to Set Up the Reclassification Process

Page Name	Object Name	Navigation	Usage
Reclassification General Info (reclassification general information)	FPMCONVTABL_PNL1	Workforce Administration, Collective Processes, Reclassify Employee FPS, Define Reclassification, Reclassification General Info	Specify the grade, step, action, and reason that are required for reclassification.
Reclassification Criteria	FPMCONVTABL_PNL2	Workforce Administration, Collective Processes, Reclassify Employee FPS, Define Reclassification, Reclassification Criteria	Enter the requirements before reclassification for each option in each grade and step that is affected.
Reclassification - New Grade	FPMCONVTABL_PNL3	• Set Up HRMS, Product Related, Workforce Administration, Workforce Data FPS, Reclassification Table, Reclassification - New Grade • Workforce Administration, Collective Processes, Reclassify Employee FPS, Define Reclassification, Reclassification - New Grade	Enter the grade and step after reclassification. Define the seniority correction formula.

Specifying the Grade, Step, Action, and Reason Required for Reclassification

Access the Reclassification General Info page.



Reclassification General Info page

Grade Enter the value before reclassification.

Step Enter the value before reclassification.

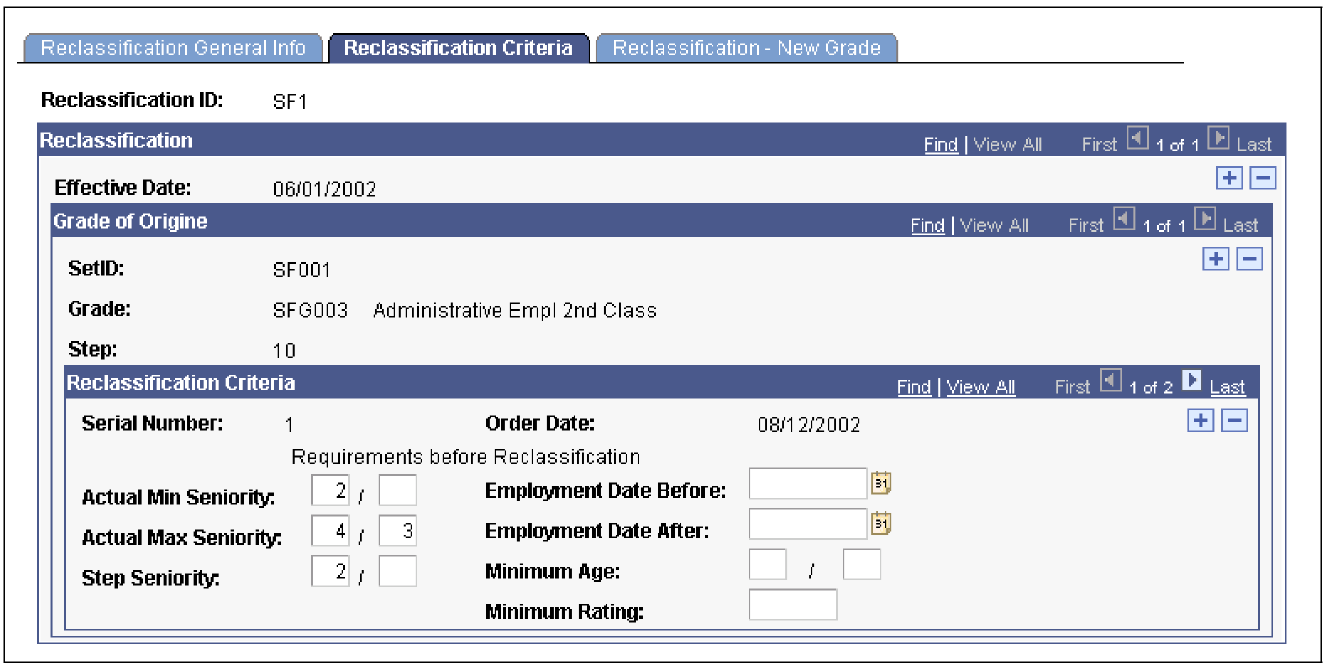
Serial Number Enter the serial number if there are several possible reclassifications for the selected grade and step. The lowest serial number is assigned to the reclassification that is most beneficial to the employee. The system checks whether an employee meets the criteria for the lowest serial number. If criteria are not met, the system reviews the criteria for serial numbers in ascending order.

Order Date Enter the date on which the government issued the order that defines the rules of the reclassification.

Action and **Reason Code** Enter the action code and reason that qualify the reclassification.

Entering the Requirements for Reclassification

Access the Reclassification Criteria page.

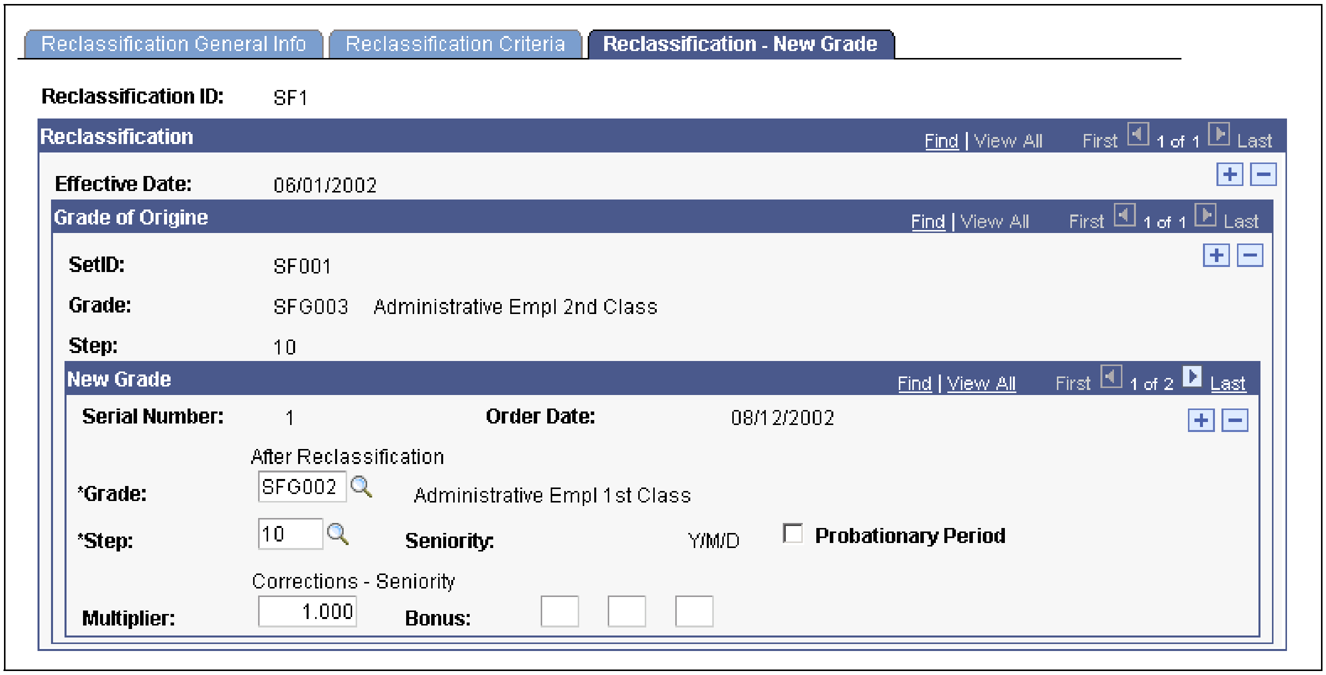


Reclassification Criteria page

Seniority and age conditions are in years and months. All conditions displayed on this page are optional.

Entering the Grade and Step After Reclassification

Access the Reclassification - New Grade page.



Reclassification - New Grade page

Grade Enter the value after reclassification.

Step Enter the value after reclassification.

Probationary Period Select if required in the new grade.

Corrections - Seniority After reclassification, the employee's seniority is corrected by applying this formula:

Step seniority after reclassification = step seniority before reclassification × multiplier + reduction in step duration in years, months, and days.

Multiplier This is the factor applied to the seniority before reclassification to calculate the seniority after reclassification. Value is *1* when 100 percent seniority is retrieved, *0.5* when 50 percent is retrieved, and so on.

Processing Reclassification Simulations

This section provides an overview of the Reclassification Simulation process and discusses how to run the Reclassification Simulation process.

Understanding the Reclassification Simulation Process

The Reclassification Simulation SQR process (FPA700) works as follows:

- The system calculates seniority.
- The system selects each grade and step combination from the reclassification chart.

  If the same grade and step combination has several reclassification options, each is identified by a serial number in the reclassification chart. These options are processed in ascending order.

- The system selects employees whose data matches the reclassification requirements that are defined by the reclassification ID.

  Requests and future actions are not considered.
- If an employee has a succession of open-ended contracts, the reclassification period can cover several contracts.

  Reclassification criteria are matched for the periods during which the employee was active.
- If the employee meets all the reclassification conditions on the reclassification effective date reclassification occurs, and the system generates a new position in the temporary Career 2 table on the reclassification effective date.
- If the employee does not meet the conditions on the effective date, but meets them by the application administrative date, the system checks to see if the criteria are met on the effective date of previous career rows.

  The grade and step of the employee must be those that are defined in the criteria. If a row is retrieved, reclassification occurs on the move date. If no row is retrieved, reclassification occurs on the application administrative date.
- When reclassification is simulated, identical career classifications (same grade and step, steps that are not terminated in Manage French Public Sector) with an effective date after the reclassification date are corrected.

  The system generates a row with the same effective date and an increased serial number.
- The values from the reclassification process are stored on the Career 2 table; old data on that table is overwritten.

See Also

Chapter 9, “Calculating Seniority and Length of Service,” page 121

Page Used to Process Reclassification Simulations

Page Name	Object Name	Navigation	Usage
Reclassification Simulation	RUNCTL_FPA700	Workforce Administration, Collective Processes, Reclassify Employee FPS, Reclassification Simulation	Run the reclassification simulation process.

Running the Reclassification Simulation Process

Access the Reclassification Simulation page.

Reclassification ID Enter the reclassification ID to use for the process.

Conversion Effective Date Select the conversion effective date. The process compares the reclassification criteria against the employee’s data on this date to determine whether to reclassify the employee.

Application Admin. Date (application administration date) Enter the application administration date. If an employee does not meet the reclassification criteria on the conversion effective date, the process checks to see if the employee meets the reclassification criteria by this date.

Validating Reclassifications

This section discusses how to validate reclassifications.

Page Used to Validate Reclassifications

Page Name	Object Name	Navigation	Usage
Reclassification Validation	FPAREGRADE_RAT_PNL	Workforce Administration, Collective Processes, Reclassify Employee FPS, Validate Reclassification	Validate the reclassification. The page displays employees' career statuses before and after reclassification. To validate each employee reclassification, activate the flag in front of each reclassification that is to be applied. Or use the Validate All option to validate all listed employees and then manually deselect those that you want to omit.

Processing Career Updates

This section discusses how to process career updates.

During the process (depending on the reclassification action code), the system checks the Action table to see if an order (individual or collective) must be created. If so, the system generates the order elements.

If the inserted row's effective date precedes the effective date of a move that is already saved in Career, the retroactivity indicator (Retroactivity Flag) is generated. In this case, you must start retroactive processing once the reclassification processing ends.

See Also

Chapter 11, "Running the Retroactivity Process," page 133

Page Used to Process Career Updates

Page Name	Object Name	Navigation	Usage
Career Update	RUNCTL_FPA710	Workforce Administration, Collective Processes, Reclassify Employee FPS, Update Career	Run the Reclassification Validation process (FPA710) to generate reclassification actions in the valid employee records.

CHAPTER 14

Managing Requests

This chapter provides an overview of request management and discusses how to:

- Manage requests.
- Request a sanction or demotion.
- Run request reports.

Understanding Request Management

You can record an event or action in employee records as an action or as a request. The system enables you to create, accept, refuse, and delete requests. You can also manage sanction and demotion requests.

Request management appears in the following components:

- Increment Step/Promotion FPS (career data).
- Update Assignment FPS.
- Update Compensation FPS.
- Update Work Time FPS.
- Update Categorization FPS (employee categorization data).
- Chg Civil Service Position FPS (civil service position data).
- Update Seniority Bonus FPS.
- Grant Premiums FPS (employee premiums data).
- Absences FPS.
- Freeze Advancement/Demotion FPS (sanction/demotion actions).

In transaction mode, the system controls requests. In collective processing, requests are not considered.

Managing Requests

This section discusses how to:

- Create a request
- Accept a request
- Refuse a request

- Delete a request

Creating a Request

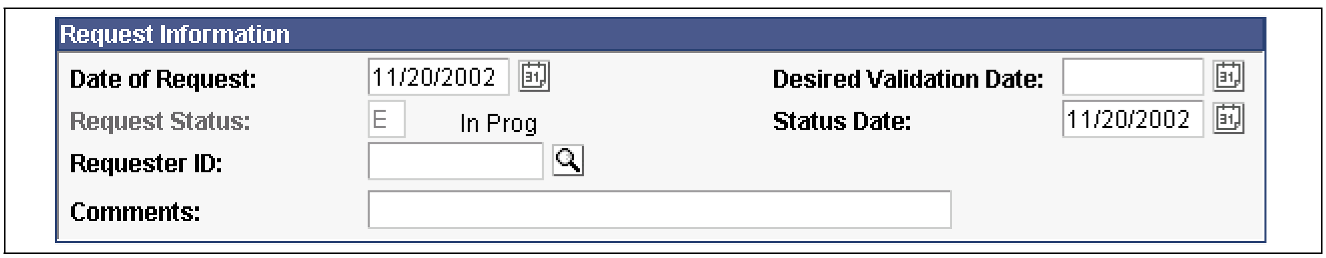
Creating a request is like recording an action.

To create a request:

1. Access the part of the employee record that is affected by the request.
2. Insert a new action.
3. Select Request.
4. In the Request Information group box, enter the request data.

   If the request is recorded in a given part of the employee record, no move with an action status of *Actual* and an effective date that is subsequent to the request effective date can be recorded in this part of the employee record (the parts are not linked).

After the request is created, the request status is *In Progress.* A reference number is assigned automatically to each new request.



Request Information group box

Accepting a Request

An *In Progress* request can be validated and accepted.

To accept a request:

1. Access the request.
2. Select the Status Date.

   Modify the data in the component when necessary.
3. Click Validate Request.
4. Click Save to confirm the validation.

   The request status is Accepted. Data in the Request frame is unavailable for entry. The action status is *Actual.*

Refusing a Request

You can refuse a request if the order has not been edited. Once an order is edited, you must abrogate the request to refuse it.

Refusing a request consists of manually modifying the move by selecting the rejected request status.

To refuse a request:

1. Access the Request record.
2. In the Request Status field, select *Request Rejected.*
3. In the Status Date field, enter the refusal date.
4. Save the request.

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

See Also

Chapter 5, “Updating Employee Records,” Deleting an Action, page 73

Deleting a Request

You can delete a request if the order has not been edited. Once an order is edited, you must abrogate the request to delete it.

To delete a request, activate the delete row. The data is deleted and is not stored

See Also

Chapter 5, “Updating Employee Records,” Deleting an Action, page 73

Requesting a Sanction or Demotion

This section discusses how to:

- Request a sanction or demotion.
- Accept or refuse a sanction or demotion.

Pages Used to Request a Sanction or Demotion

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

Requesting a Sanction or Demotion

Access the Sanct/Demotion - Overall Data page.

Recording a sanction request is the same as recording a sanction or a demotion.

See Also

Chapter 5, "Updating Employee Records," Managing Sanctions and Demotions, page 81

Accepting or Refusing a Sanction or Demotion

To accept a sanction request or demotion, validate it in the Sanction/Demotion component or the Career component. The system updates both parts of the employee record.

To refuse a sanction request, delete it in the Delete Career Data FPS component.

Running Request Reports

This section discusses how to run request reports.

Pages Used to Run Request Reports

Page Name	Object Name	Navigation	Usage
Assignment - Request tbc	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, Assignment - Request tbc FPS	Generate the Assignment - Request tbc report (FPA-AFFE). This report lists requests for assignment changes that need to be approved.
Career - Requests tbc	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, Career - Request tbc FPS	Generate the Career - Request tbc report (FPA-CARR). This report lists requests for career changes that need to be approved
Assignment - Req Rejected (assignment - request rejected)	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, Assignment - Rqst Rejected FPS	Generate the Assignment - Request Rejected report (FPAHISTA) that lists rejected assignment change requests.
Career - Request Rejected	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, Career - Request Rejected FPS	Generate the Career - Request Rejected report (FPAHISTC) that lists rejected career change requests.
Civil PosiPosit. - Req Reject (civil service position - request rejected)	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, CS Position - Rqst Reject. FPS	Generate the CSPosition - Request Rejected report (FPAHISTP) that lists rejected civil service position requests.

Page Name	Object Name	Navigation	Usage
Compensation - Req Rejected	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, Compensatn - Rqst Reject. FPS	Generate the Compensation - Request Rejected report (FPAHISTS) that lists rejected compensation change requests.
Work Time - Req Rejected	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, Work Time - Rqst Rejected FPS	Generate the Work Time - Request Rejected report (FPAHISTW) that lists rejected work time change requests.
Civil Service Position	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, CS Position Request tbc FPS	Generate the CS Position tbc report (FPA-POSI) that lists civil service position change requests requiring approval.
Compensation - Request tbc	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, Compensation - Request tbc FPS	Generate the Compensation – Request tbc report (FPA-REMU) that lists compensation change requests requiring approval.
Work Time - Req tbc	RUNCTL_FPACRYSTAL1	Workforce Administration, Workforce Reports, Work Time - Request tbc FPS	Generate the Work Time - Request tbc report (FPA-TDTR) that lists work time change requests requiring approval.

CHAPTER 15

Managing Secondment

This chapter provides an overview of secondment management and discusses how to:

- Set up external secondments.
- Set up internal secondments.
- End or return from secondments.
- Manage contributions for employees on external secondment.

Understanding Secondment Management

Manage French Public Sector manages employee secondment by distinguishing between external and internal secondment. The home organization differs from the host organization during external secondment. During internal secondment, the home and host are the same.

While on external secondment, an employee is referred to as a received employee by the host organization and a sent employee by the home organization.

Prerequisites

Before you begin entering secondment positions, you must define authorized actions for employees on secondment for each civil service position.

To define authorized actions for employees on secondment:

1. Access the CS Position/Action page.
2. Distinguish between employees on secondment and employees not on secondment for each action.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Authorizing Actions by Civil Service Position, page 19

Setting Up External Secondment

This section discusses how to:

- Hire an employee on external secondment.
- Register a sent employee.
- Enter secondment data.

Page Used to Set Up External Secondments

Page Name	Object Name	Navigation	Usage
Secondment Information	FPAEELEGAL_SEC	Click Secondment Information on the Civil Service Position Data page.	Enter secondment data.

Hiring an Employee on External Secondment

The Employee on Secondment position is recorded during the Initialize Status step of the hiring process.

To hire an employee on external secondment:

1. Access the Civil Service Position Data page.
2. Select Employee on Secondment.
3. Select External Secondment.
4. Click Secondment Information to enter the employee's home organization on the Secondment Information page.

See Also

Chapter 4, "Hiring French Public Sector Employees," page 51

Registering a Sent Employee

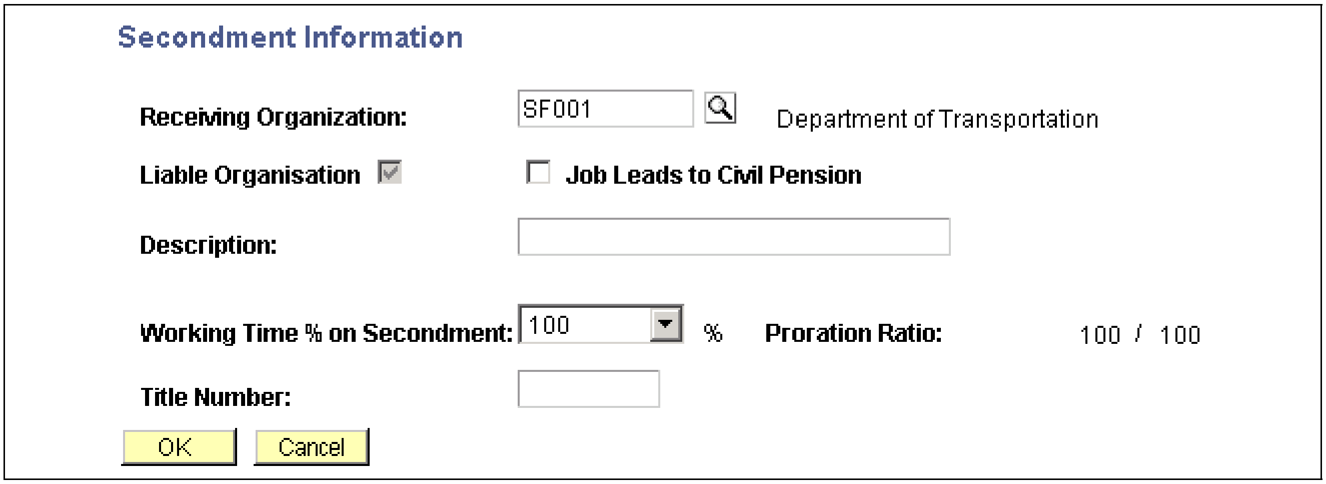
The secondment position is recorded in the Chg Civil Service Position FPS component.

To register a sent employee:

1. Access the Civ Serv Posit. - Overall Data page.
2. Select an action generating a secondment position.
3. Access the Civil Service Position Data page.
4. Select External Secondment in the Secondment group box.
5. Indicate the secondment expected end date.

Entering Secondment Information

Access the Secondment Information page.



Secondment Information page

Receiving Organization and **Liable Organization**	Select the organization. The Liable Organization check box is automatically selected if appropriate for this organization.
Job Leads to Civil Pension	Select if the secondment position must imply a call from the “employee” contribution. Depending on the job in the host organization, either the host organization must calculate and deduct the employee contribution (the check box is selected), or the home organization must calculate it and send the employee the share to be paid (the check box is cleared).
Title Number	Enter call letters identifying the position. This information is mandatory if contributions are calculated in your organization.

See Also

Chapter 3, “Setting Up French Public Sector Tables,” Defining Civil Service Positions, page 10

Chapter 15, “Managing Secondment,” Managing Contributions for Employees on External Secondment, page 157

Setting Up Internal Secondment

For internal secondment, the employee has two records in Manage French Public Sector: the initial record and the secondment record. In the initial record, the employee’s civil service position is *On Secondment.* In the secondment record, the employee is *Employee on Secondment* with an *Active* civil service position. Then both careers can develop concurrently.

This section discusses how to:

- Record secondment on the employee’s initial record.
- Create a secondment record.

Recording Secondment on the Employee’s Initial Record

To record secondment:

1. Access the Civ Serv Posit. - Overall Data page.

2. Select an action generating a secondment position.
3. Access the Civil Service Position Data page.
4. Select Internal Secondment in the Secondment group box.
5. Indicate the secondment expected end date.

Creating a Secondment Record

Creating a concurrent employee record is just like hiring a new employee. The action code is set up in the Add Concurrent Empl Record FPS component.

To create a new internal secondment record:

1. Access the Status page of the Add Concurrent Empl Record FPS component.
2. Enter the employee ID and change the record number to *9* when accessing the component.

   In Manage French Public Sector, an internal secondment record number is always 9. This record number is mandatory.
3. Complete the Status page.
4. Access the Civil Service Position Data page.
5. Select Employee on Secondment.
6. Select Internal Secondment.
7. Enter the employee's business unit, department, and job code.
8. Save.

   When saving, the system checks if, on the given date, the employee's civil service position is Secondment in the initial record. If this is not the case, an error message appears, and you must record the secondment in the initial record.

See Also

Chapter 5, "Updating Employee Records," Managing Civil Service Positions, page 83

Chapter 4, "Hiring French Public Sector Employees," page 51

Ending or Returning from Secondment

This section discusses how to:

- Update records for received employees.
- Update records for sent employees.

Updating Records for Received Employees

The end of secondment in a host organization implies the end of the employee's records in the organization.

To end secondment for received employees:

1. Access the Civ Serv Posit. - Overall Data page in the Chg Civil Service Position FPS component.

2. Select a terminating type of event.

See Also

Chapter 5, "Updating Employee Records," Managing Civil Service Positions, page 83

Updating Records for Sent Employees

When employees return from secondment, their civil service positions in the home organization change.

To process returning employees:

1. Access the Civ Serv Posit. - Overall Data page.
2. Select an action.
3. Access the Civil Service Position page.
4. Select None in the Secondment group box.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Authorizing Actions by Civil Service Position, page 19

Managing Contributions for Employees on External Secondment

This section provides overviews of the contribution share calculation and secondment period modifications, lists prerequisites, and discusses how to:

- Identify and calculate deductions.
- Edit call letters.

Understanding Contribution Share Calculation

The share equals the rate multiplied by the contribution basis.

The contribution basis is expressed by the following formula:

```
Contribution basis = Increased index x Point value x Proration ratio in host org
```

A secondment proration ratio is determined from the secondment work time percentage. It depends on civil service position and work time percentage.

If an employee is in a step, the contribution basis takes into account:

- The increased index (deducted from gross index) in the home organization.
- The point value in the home organization.
- The secondment proration ratio.

If an employee is in a substep, the contribution basis takes into account:

- The annual compensation associated with the scale-letter / substep in home organization.

- The secondment proration ratio.

Understanding Secondment Period Modifications

A semester can be divided into several periods. Within the semester, dates are limited by an event associated with one of the following elements:

Event Impact Type	Events That Might Require Dividing the Semester
Secondment start or end date.	Modification of civil service position.
Modification of the employer contribution rate.	Modification of the employer rate value.
Modification of the employee contribution rate.	Modification of the employee rate value associated with a status.
Modification of the contribution basis.	• Modification of the increased index. • Modification of the point value. • Modification of the annual compensation value associated with a scale-letter / substep. • Modification of the secondment work time percentage.

Calculations are on a thirtieth pro rata basis and are rounded down to the nearest Euro.

The system determines the employee contribution amount for a semester by compiling the results of each semester elementary period. The results for each period and the total semester are stored.

Prerequisites

Before you calculate secondment contributions, you must define the host organization, the status/population codes, the employer rate, and the secondment itself. You must leave the Job Leads to Civil Pension check box cleared and assign a title number on the Secondment Information page.

To set up secondment contributions:

- Define the host organization using the Type of Organization, Sub-Types of Organization, and Organizations pages to define host organization types and subtypes, and the organizations themselves.
- Link contribution rates and statuses by associating an employee contribution rate code with each status on the Status/Population Codes page.
- Define the employer rate contribution by defining the actual employer contribution rate value on the Employer Contribution Rate page.
- Run the merge process between Manage French Public Sector (FPS) and Human Resources data.

See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up Host Organizations, page 46

Chapter 3, "Setting Up French Public Sector Tables," Defining Status and Population Codes, page 8

Chapter 3, "Setting Up French Public Sector Tables," Establishing the Employer Contribution Rate, page 48

Chapter 15, "Managing Secondment," Setting Up External Secondment, page 153

Chapter 15, "Managing Secondment," Setting Up Internal Secondment, page 155

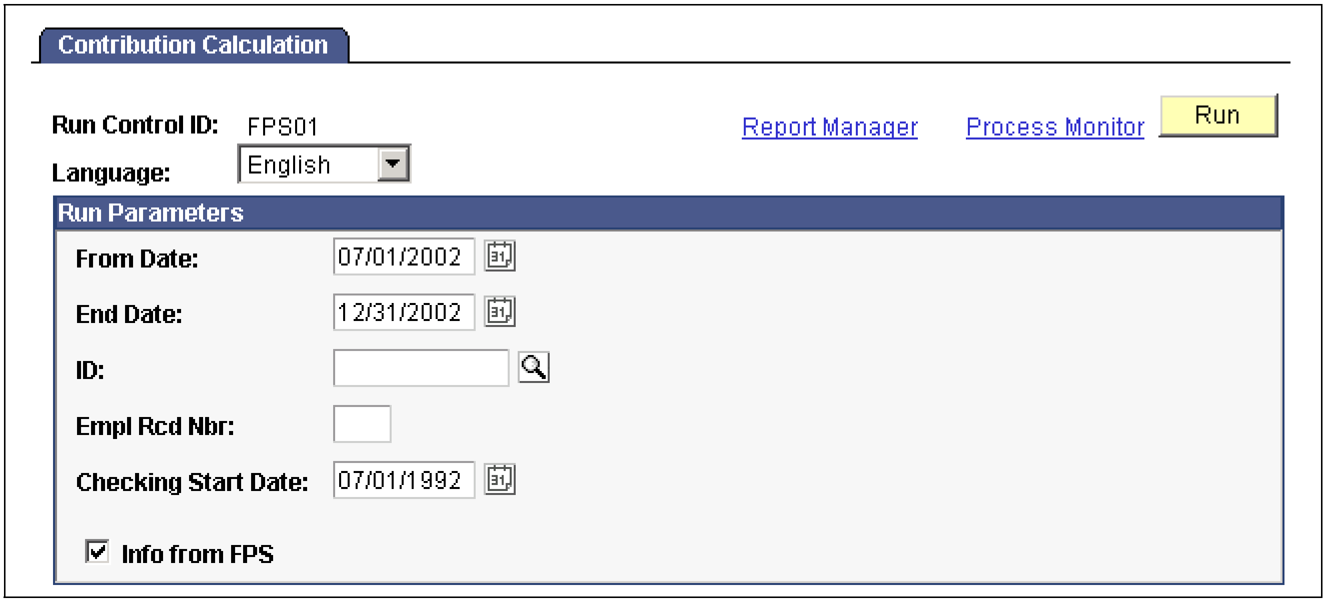
Chapter 16, "Merging French Public Sector and Human Resources Files," page 161

Pages Used to Manage Contributions for Employees on External Secondment

Page Name	Object Name	Navigation	Usage
Contribution Calculation	RUNCTL_FPA1100	Workforce Administration, Collective Processes, Calculate Contribution FPS	Run the Calls for Entitlement SQR process (FPA1100) that identifies and calculates employee contributions.
Payment Contribution Summary Table	FPACNTRBTOT_PNL	Workforce Administration, Collective Processes, Review Payment Cont FPS	View the employees liable to contribute for civil pension for a given semester and indicate whether the contributions have been paid.
Call Letters	RUNCTL_FPA1150	Workforce Administration, Collective Processes, Contribution Call Letter FPS	Edit call letters.

Identifying and Calculating Deductions

Access the Contribution Calculation page in correction mode.



Contribution Calculation page

Start Date and **End Date**	The end date is automatically set to six months after the start date, but you can modify this date.
ID and **Empl Rcd Nbr** (employee record number)	Enter one or both. When left blank, the system calculates all employees' contributions.
Checking Start Date	The system checks that no retroactive modifications affect existing calculations between the check start date and the semester start date. By default, the period checked is 10 years.
Info From FPS	Select to import required data from the home organization.

Click Run. The system identifies employee deductions by employee ID, semester, title number, and sequence number.

Editing Call Letters

Access the Call Letters page in correction mode.

Call letters are those elements on the settlement/payment record that define the employer and employee contribution shares. Contribution call letters contain the employee's address and the contribution amounts. You must run the Calls for Entitlement process (FPA1100) before editing call letters.

To edit call letters:

1. Enter the employee ID and record number.
2. Enter the start and end dates. These dates define the edit period.
3. Run one of the following Crystal reports:
   - FPACNTR: edit call letters for the employee share.
   - FPACNTR2: edit call letters for the employer share.

CHAPTER 16

Merging French Public Sector and Human Resources Files

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

- Execute the merge.
- View merged records.

Understanding the Merge Process

The merge process provides an interface between Manage French Public Sector and various PeopleSoft Enterprise Human Resources business processes. This process is mandatory.

As soon as the personnel manager completes the first step in the FPS hiring process, the pre-hired employee is available in all Human Resources components.

If an employee is transferred from one department to another, the effect on Human Resources security begins for the non-FPS components only after the merge is executed.

The merge process consists of feeding and updating the standard JOB, JOB_JR, and COMPENSATION tables (job data) with various Manage French Public Sector tables. The system considers only actual actions, not requests. The merge process is possible only after the hire is validated.

Each event in the employee record corresponds to a move in the merged record. When the same event, which has the same action and effective date, appears in various parts of the employee record, only one row is created in the merged record.

When two events have been registered in two different parts of the record on the same date, the process generates two rows in the merged record.

There are three SQR processes to merge data:

- The Merge Application Engine process (FPA0501).

  This process updates the JOB, JOB_JR, and COMPENSATION tables for a particular employee ID and employee record number. You start this process manually.

- The Merge All Application Engine process (FPA0503).

  This process updates the JOB, JOB_JR, and COMPENSATION tables for all employee IDs and record numbers that have been modified since the last update according to the following guidelines:

  - If a row is deleted in the employee record, the record is stored by the hiring date.
  - If there are only updates and creations, the record is reconstituted from the earliest effective date.

    It is recommended that you run this process each night. You must schedule this process.

- The Merge All process (FPA504).

  This processes the merge for all employee IDs and record numbers. This process is delivered by PeopleSoft and can be run using sqrw.exe. Run this process once before going live to create JOB data.

See Also

Chapter 5, "Updating Employee Records," Managing Employee Premiums, page 91

Chapter 5, "Updating Employee Records," Managing Compensation Data, page 89

Chapter 3, "Setting Up French Public Sector Tables," Setting Up Grades, page 42

Executing the Merge

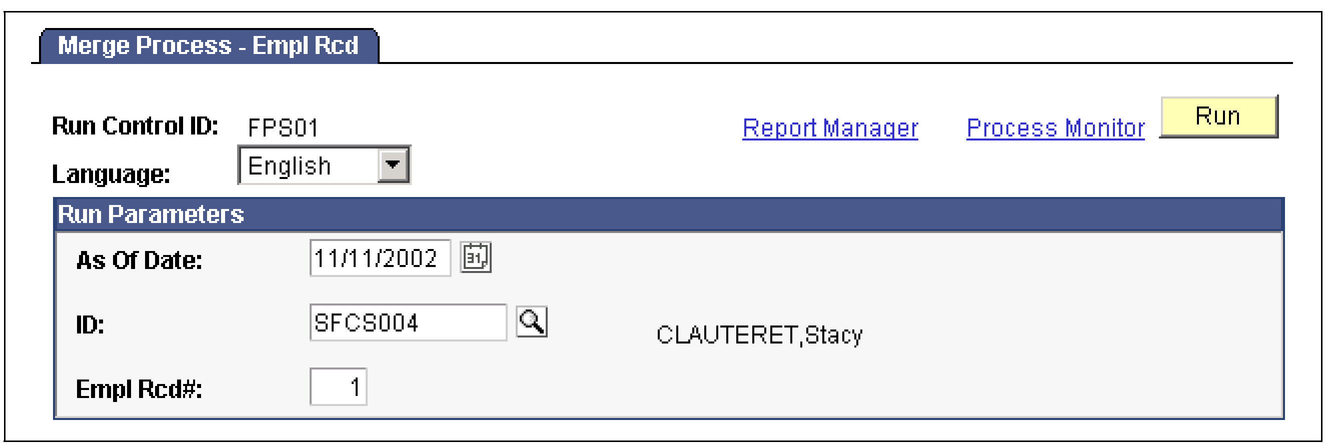
This section discusses how to merge data for a specified employee and record number.

Pages Used to Execute the Merge

Page Name	Object Name	Navigation	Usage
Merge Process - Empl Rcd (merge process - employee record)	RUNCTL_FPA50X	Workforce Administration, Job Information, Merge Employee Record FPS	Run the Merge process (FPA501) to merge data for a specified employee ID and record number.
Merge Process - All	PRCSRUNCNTL	Workforce Administration, Collective Processes, Merge All Employee Records FPS	Run the Merge All process (FPA503) to merge data for all employee IDs and record numbers.

Merging Data for a Specified Employee ID and Record Number

Access the Merge Process - Empl Rcd page.



Merge Process - Empl Rcd page

Select the date and employee ID.

The date that you select enables the system to select and merge all actions with effective dates that are later than or equal to the selected date. To merge the entire career of an employee, enter a date that is earlier than or equal to the hire date.

Viewing Merged Records

This section discusses how to view merged records.

Pages Used to View Merged Records

Page Name	Object Name	Navigation	Usage
Job Data - Career	FPAJOB_SUM1	Workforce Administration, Job Information, Review Job Information, Job Data FPS, Job Data - Career	View an employee's career information.
Job Data - Assignment	FPAJOB_SUM2	Workforce Administration, Job Information, Review Job Information, Job Data FPS, Job Data - Assignment	View an employee's assignment information.
Job Data - Compensation	FPAEESCP_PNL	Workforce Administration, Job Information, Review Job Information, Job Data FPS, Job Data - Compensation	View an employee's compensation information.
Job Data	FPAJOB_SUM4	Workforce Administration, Job Information, Review Job Information, Job Data FPS, Job Data	View an employee's job data information.
Job Data History 1	FPAJOB_SUM_PNL	Workforce Administration, Job Information, Review Job Information, Job Data History FPS, Job Data History 1	View an employee's career history derived from all the merged records.
Job Data History 2	FPAJOB_SUM2_PNL	Workforce Administration, Job Information, Review Job Information, Job Data History FPS, Job Data History 2	View an employee's career history derived from all the merged records.
Merge Process Results	FPA_CI_RSLT_PNL	Workforce Administration, Collective Processes, Review Merge Results FPS	View the merge process results.

CHAPTER 17

Managing Headcount

This chapter provides an overview of budgetary headcount and discusses how to:

- Set up the headcount management system.
- Manage the commitment accounting entity.
- Book CAE with an insufficient margin.
- Calculate the workforce.

Understanding Budgetary Headcount

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

Common Terms in This Chapter

Commitment Accounting Entity Category

The Finance Act is composed of budget lines. Some lines allocate a given number of employees per grade or grade group. The grade or grade group described in a single budget line is called the Commitment Accounting Entity Category (CAEC). The CAEC represents the most refined level at which the organization monitors headcount. Headcount is expressed in whole numbers.

Commitment Accounting Entity (CAE)

The CAE is a budget position ratio associated with one employee during a limited period. The CAE is described by the employee ID, employee record number, CAEC corresponding to the employee grade, employee proration ratio, and CAE start date.

Once hired, an employee is assigned a CAE. The CAE is active as long as:

- The employee has a civil service position implying budget attendance.

  Thus the employee is not active when terminated or on leave.
- The employee's successive grades are all in the same CAEC.
- The employee's work time percentage doesn't change.

Both work time percentage changes and grade promotions associated with a CAEC change imply a CAE reallocation.

Setting Up the Headcount Management System

This section discusses how to:

- Set CAE controls.
- Enter the budget line definition for each CAEC.
- Associate a grade with a CAEC.
- Record Finance Act details.
- Enter budgeted headcount.
- Calculate authorized budgeted headcount from budgeted headcount.
- Calculate authorized headcount management and manage freezes.
- Lock in CAECs.
- Distribute budgeted headcount to administrative structures.

Pages Used to Set Up the Headcount Management System

Page Name	Object Name	Navigation	Usage
CAE Category	FPM_CA_CTG_PNL1	Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, CAE Category, CAE Category	Enter the budget line information for each CAEC.
CAEC Composition	FPM_CA_CTG_PNL2	Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, CAE Category, CAE Composition	Associate a grade with a CAEC.
Finance Act Definition	FPMFINLAWB_PNL1	• Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Fact with BL on Request, Finance Act Definition • Workforce Administration, Headcount FPS, Define Headcount Data, Fact with BL on Request, Finance Act Definition	Record the details of the Finance Act, including the Initial Finance Act and any amendments.

Page Name	Object Name	Navigation	Usage
Budget Lines	FPMFINLAWB_PNL2	• Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Fact with BL on Request, Budget Lines • Workforce Administration, Headcount FPS, Define Headcount Data, Fact with BL on Request, Budget Lines	Enter budget line data, including budgeted headcount, for each CAEC.
Locking ins	FPMFINLAWB_PNL3	• Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Fact with BL on Request, Locking ins • Workforce Administration, Headcount FPS, Define Headcount Data, Fact with BL on Request, Locking ins	Lock in headcount on one CAEC to overstaff another CAEC.
From BH to BHA	FPMFINLAWC_PNL1	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, From BH to BHA • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, From BH to BHA	Calculate the authorized budget headcount from the budgeted headcount.
From BHA to AHM	FPMFINLAWC_PNL2	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, From BHA to AHM • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, From BHA to AHM	Calculate the authorized headcount management from the authorized budgeted headcount.

Page Name	Object Name	Navigation	Usage
Control Panel - 1	FPMFINLAWC_PNL3	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, Control Panel - 1 • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, Control Panel - 1	View a summary of headcount and recorded moves by CAEC.
Control Panel - 2	FPMFINLAWC_PNL4	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, Control Panel - 2 • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, Control Panel - 2	Retrieve the AHM and all mass and transaction freezes. View usable headcount.
Control Panel - 3	FPMFINLAWC_PNL5	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line Detail, Control Panel - 3 • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line Detail, Control Panel - 3	View actions captured in employee records and each action's impact. Updated automatically if the CAE control is activated.
BHAD	FPADPTCAHDCNT_PNL	Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budgeted Headcount AD	Distribute headcount between departments.
CAEC/Grade	FPM_CA_CTG_RK_PNL1	Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, CAEC / Grade	View the CAECs to which a grade belongs.

Page Name	Object Name	Navigation	Usage
Budget Line View - From BH to BHA	FPMFINLAWD_PNL1	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, From BH to BHA • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, From BH to BHA	View transfers of budgeted headcount that result in authorized budget headcount.
Budget Line View - From BHA to AHM	FPMFINLAWD_PNL2	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, From BHA to AHM • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, From BHA to AHM	View lock-ins of authorized budgeted headcount that result in authorized headcount management.
Budget Line View - Control Panel - 1	FPMFINLAWC_PNL3	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, Control Panel - 1 • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, Control Panel - 1	View a summary of headcount and recorded moves by CAEC.
Budget Line View - Control Panel - 2	FPMFINLAWC_PNL4	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, Control Panel - 2 • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, Control Panel - 2	Retrieve the AHM and all mass and transaction freezes. View usable headcount.

Page Name	Object Name	Navigation	Usage
Budget Line View - Control Panel - 3	FPMFINLAWC_PNL5	• Workforce Administration, Headcount FPS, Define Headcount Data, Budget Line View, Control Panel - 3 • Set Up HRMS, Product Related, Workforce Administration, Manage Headcount FPS, Budget Line View, Control Panel - 3	View actions captured in employee records and each action's impact. Updated automatically if the CAE control is activated.

Setting CAE Controls

CAE management is optional. To automatically update the CAE when you modify employee records, activate the CAE Control flag in on the FPS Installation Parameters 1 page. You must activate it when setting up Manage French Public Sector. When the CAE Control check box is selected, the Last CAE Number field displays the last number assigned.

If the CAE Control flag is activated, an employee with a career path is assigned one CAE as long as he or she has a civil service position implying budget attendance.

To define attendance for each civil service position:

1. Access the Civil Service Position Definition page.
2. Select the Attendance type.

   This setup enables you to calculate civil service position and budget headcount as well as potential full-time equivalents (PFTEs). If the Budget check box is selected, employees need a CAE for this civil service position.

   Note. If an employee transfers from a civil service position that has the Budget check box selected to a civil service position that has the Budget check box cleared, the CAE related to the old position is deallocated.

The budget position ratio of a budgeted employee is the proration ratio applied to the main compensation.

To define the proration ratio for a civil service position:

1. Access the Proration Ration page.
2. Enter the ratios associated with each work time percentage.

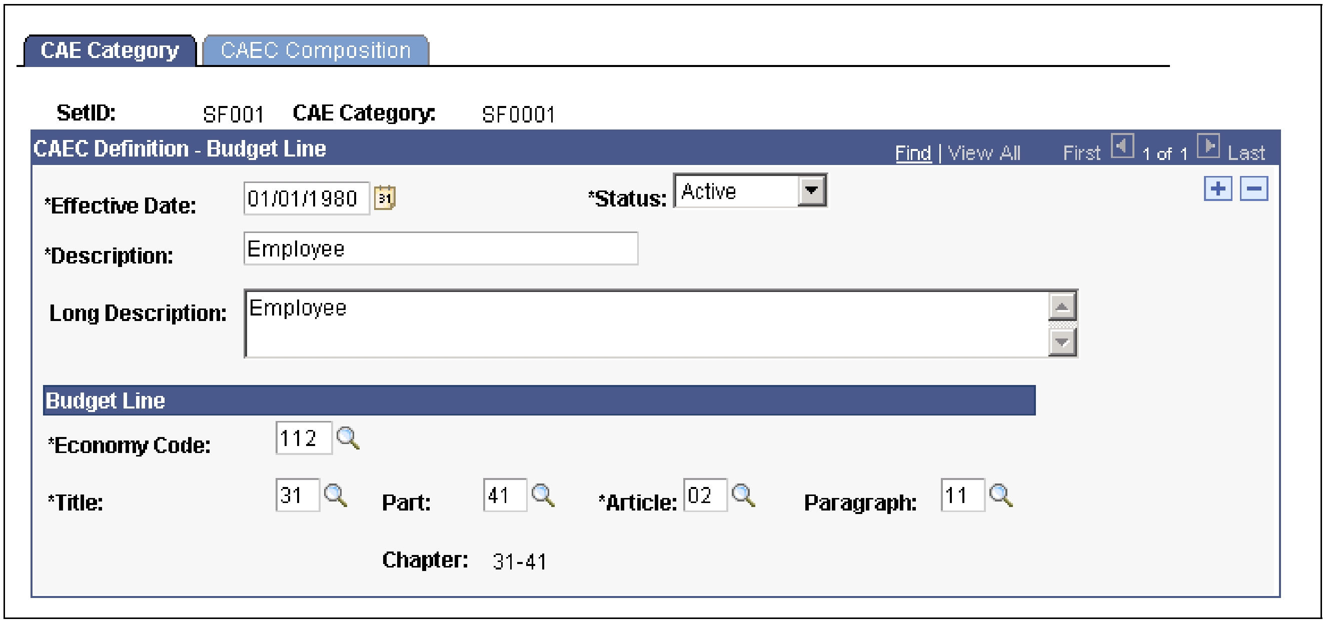
See Also

Chapter 3, "Setting Up French Public Sector Tables," Setting Up FPS Installation Parameters, page 25

Chapter 3, "Setting Up French Public Sector Tables," Defining Civil Service Positions, page 10

Entering the Budget Line Definition for Each CAEC

Access the CAE Category page.

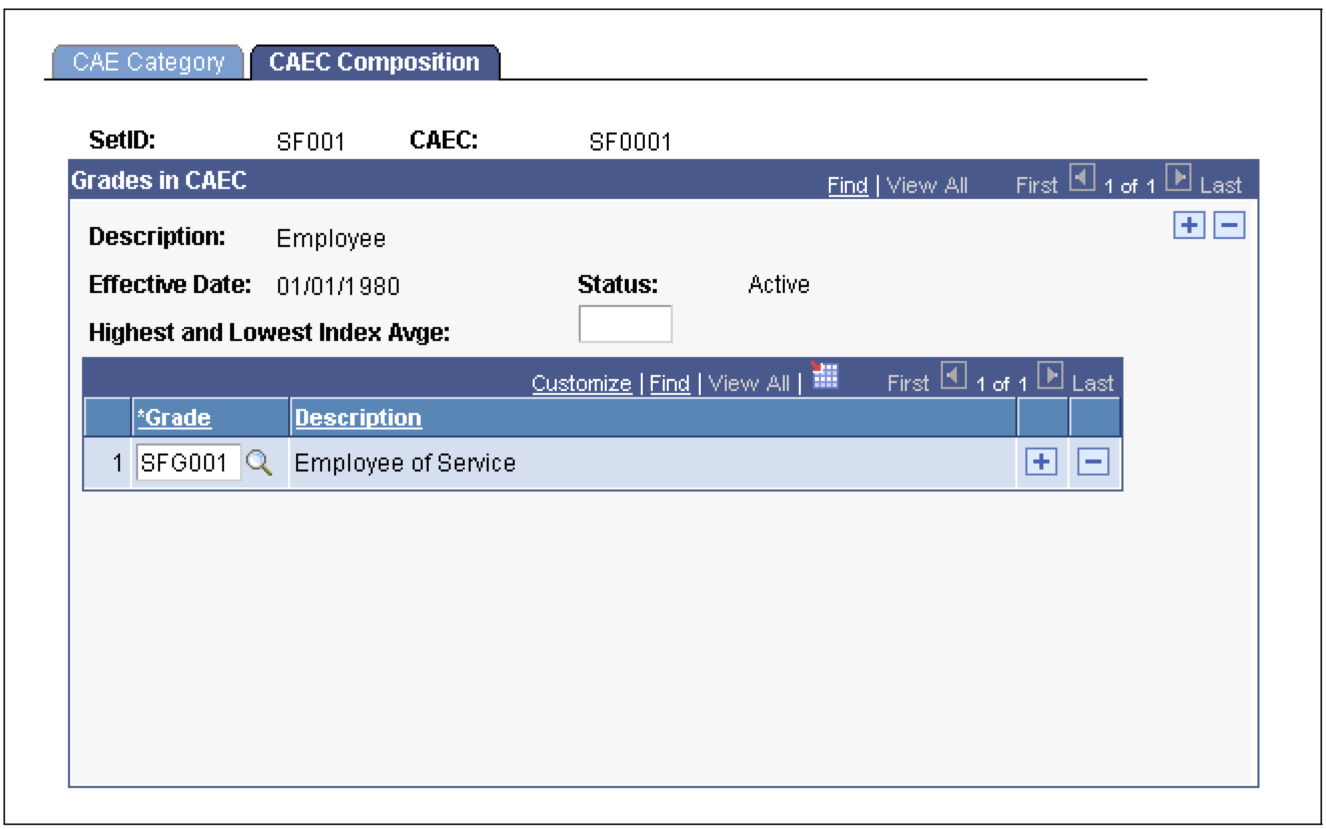


CAE Category page

Chapter The system populates this field once you enter the title and part.

Associating a Grade with a CAEC

Access the CAEC Composition page.



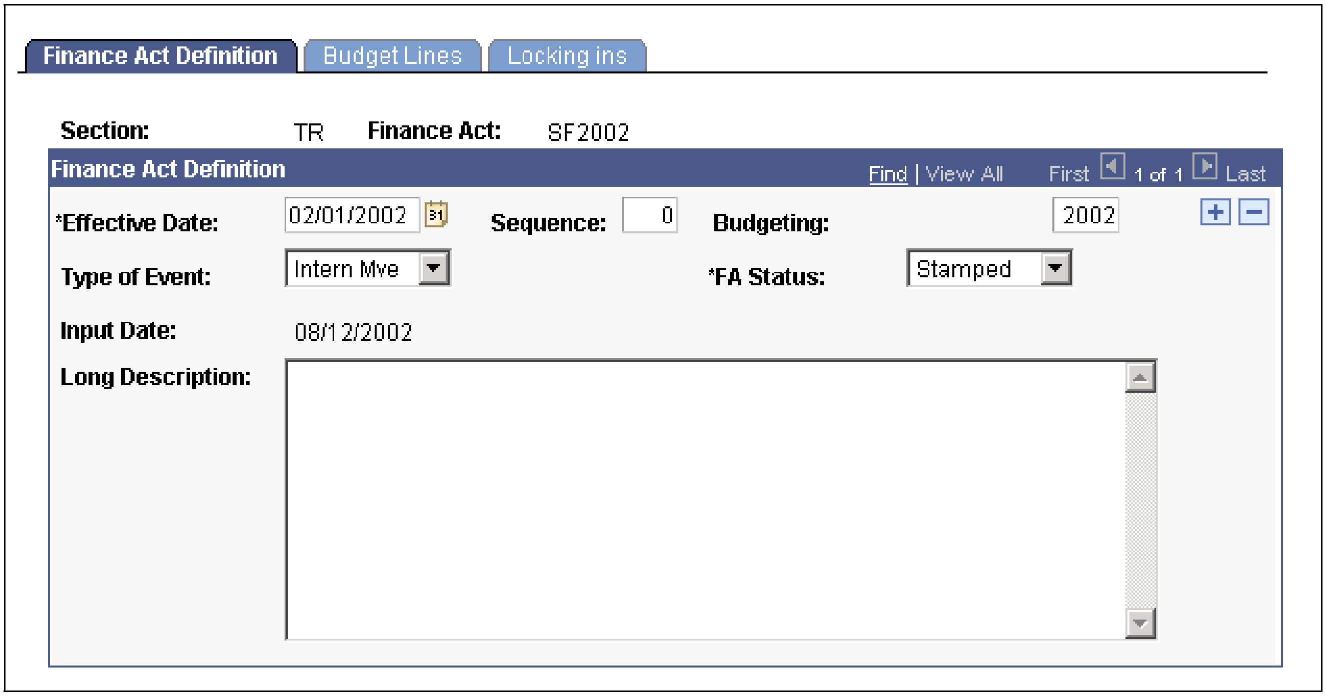
CAEC Composition page

Highest and Lowest Index Avge (highest and lowest index average)
Enter the average of the highest and lowest indexes of the grade.

Grade
Enter a grade list, depending on the CAEC setID. You can view the relationship between CAECs and grades on the CAEC/Grade page. If a grade has been associated with different CAECs, the system displays all the CAECs.

Recording Finance Act Details

Access the Finance Act Definition page.



Finance Act Definition page

The first row in the Finance Act Definition group box is the Initial Finance Act; the effective date is January 1. The type of event must be *Initial.* Amendments to the initial act can occur any time during the budget year.

Sequence
Enter the sequence number. Use sequence number to record several instances in the FA on the same date.

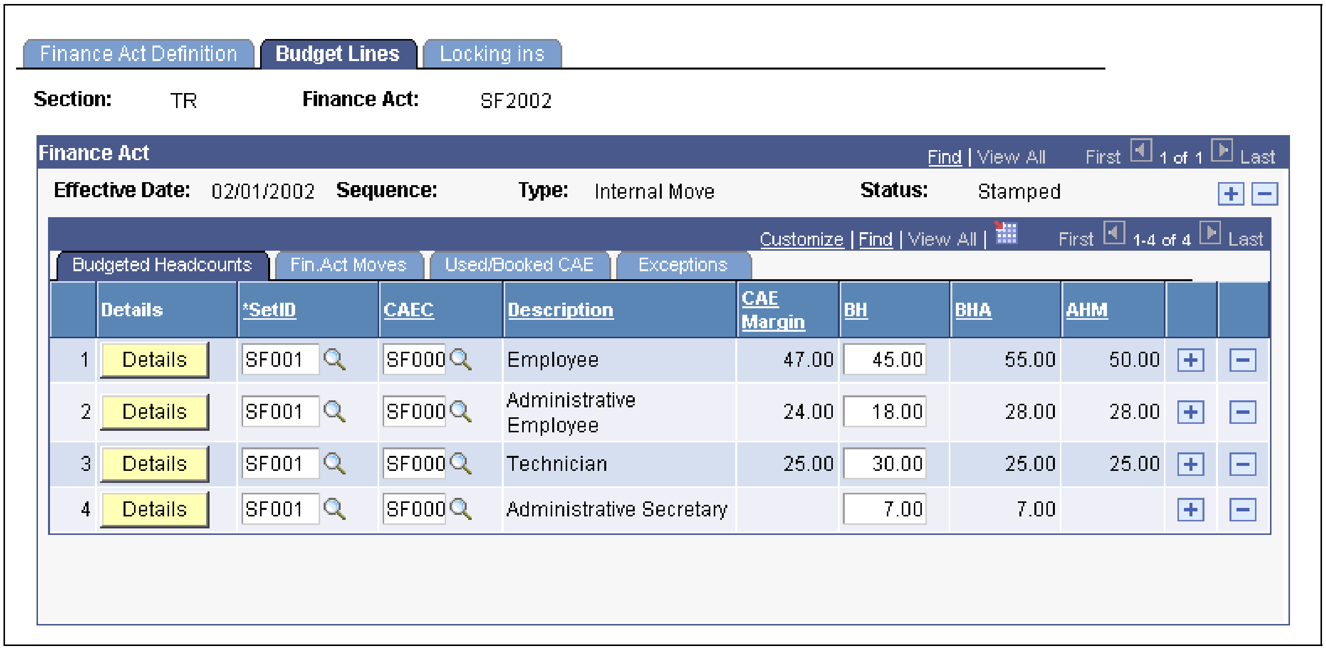
Budgeting
Enter the year taken into account by the FA. The budget year of the effective-date year is used as the default value.

Type of Event
Enter the event qualifying the FA update. Amendments introduced to the FA result from an order or an internal move, or a rectification of the act.

Description
Enter a description of the FA modifications.

Entering Budgeted Headcount

Access the Budget Lines page.



Budget Lines page

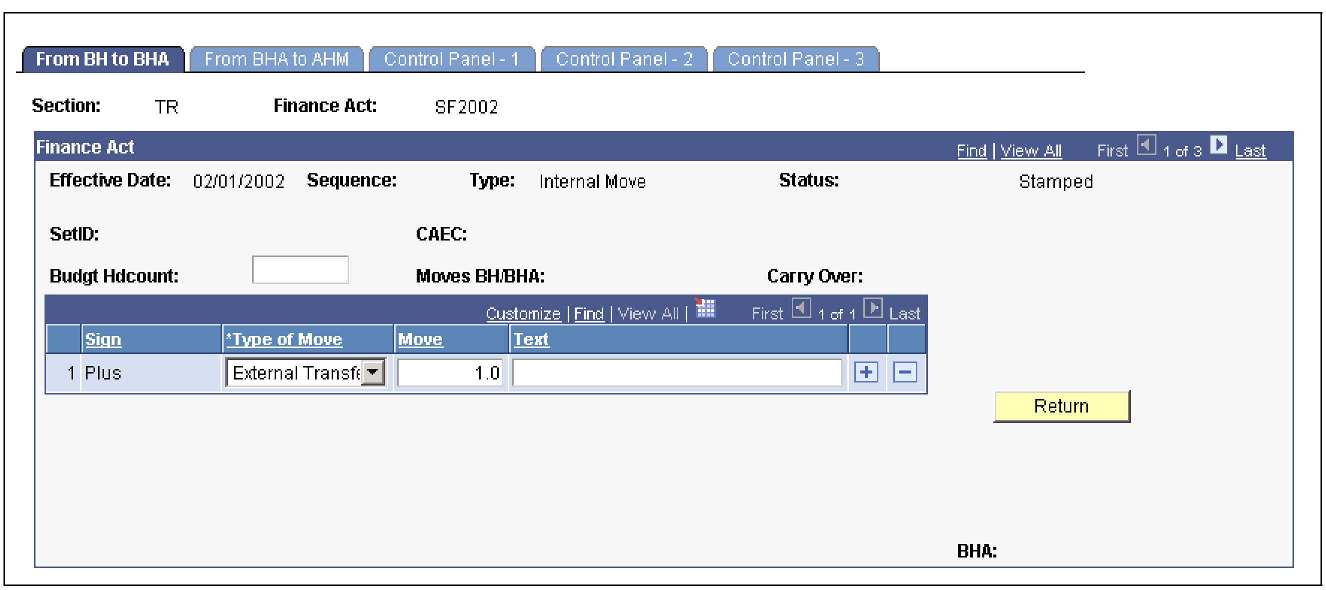
Enter the budgeted headcount, budget line by budget line. Each budget line (BL) is identified by a CAEC. Use the tabs to view additional budget data populated from the Budget Line Details component.

To describe the position creations or deletions that affect a CAEC, click the corresponding Details button. The Budget Line Details component you access contains 5 pages.

CAE Margin Displays the CAE margin which is equals the used headcount minus the CAEs booked (stamped or not), allocated, or locked in.

Calculating Authorized Budgeted Headcount from Budgeted Headcount

Access the From BH to BHA page.



From BH to BHA page

Type of Move Select the move type. Types include potential budget overstaffing, locking in, or transfers. These moves result from an order or a rectification of the FA.

Move Enter the number of budgeted positions. If the number is negative, include the negative sign. This updates the Sign field.

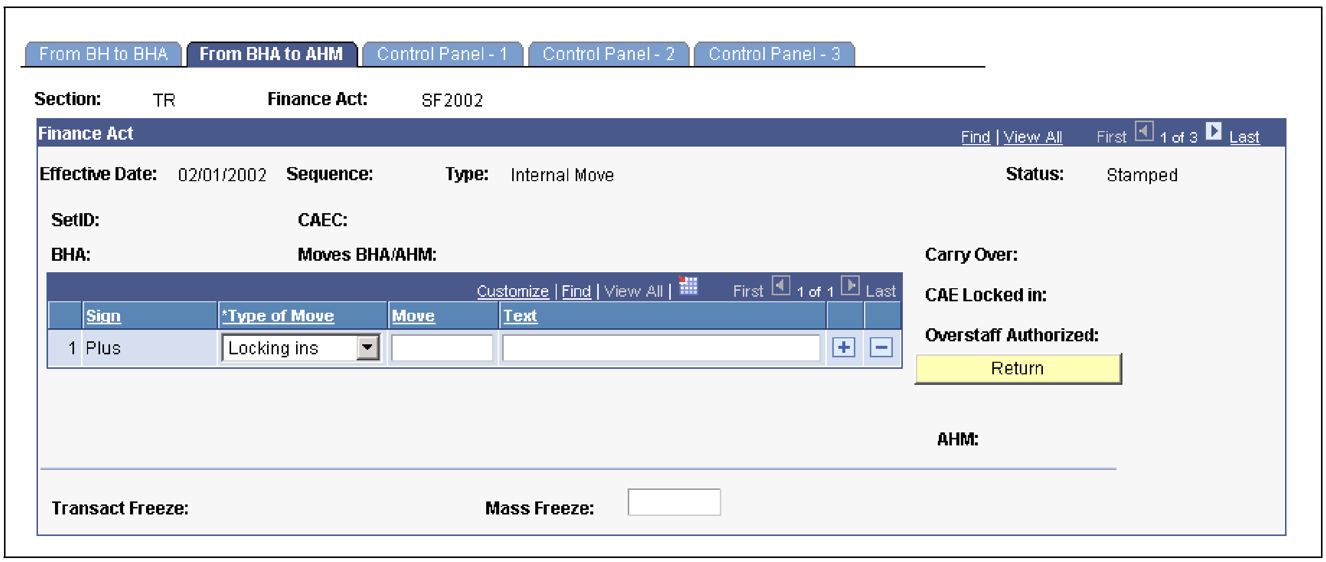
Text Enter any comments.

Return Click to return to the Budget Lines page and view all the CAECs.

The system compiles the moves, stores the total in the Moves BH/BHA field, and adds the total to the budgeted headcount (BH) to create the authorized budget headcount (BHA). If the same type of move has been previously recorded, the carry over is calculated and displayed.

Calculating Authorized Headcount Management and Managing Freezes

Access the From BHA to AHM page.



From BHA to AHM page

You must have previously calculated the BHA on the From BH to BHA page; many of the fields on this page are similar to the From BH to BHA page. The moves entered in this page are internal decisions.

Mass Freeze Enter the mass freeze number.

Transact Freeze (transaction freezes) The system derives this value from the freeze percentages applied when an employee leaves. The system calculates effective headcount by subtracting total freezes from AHM.

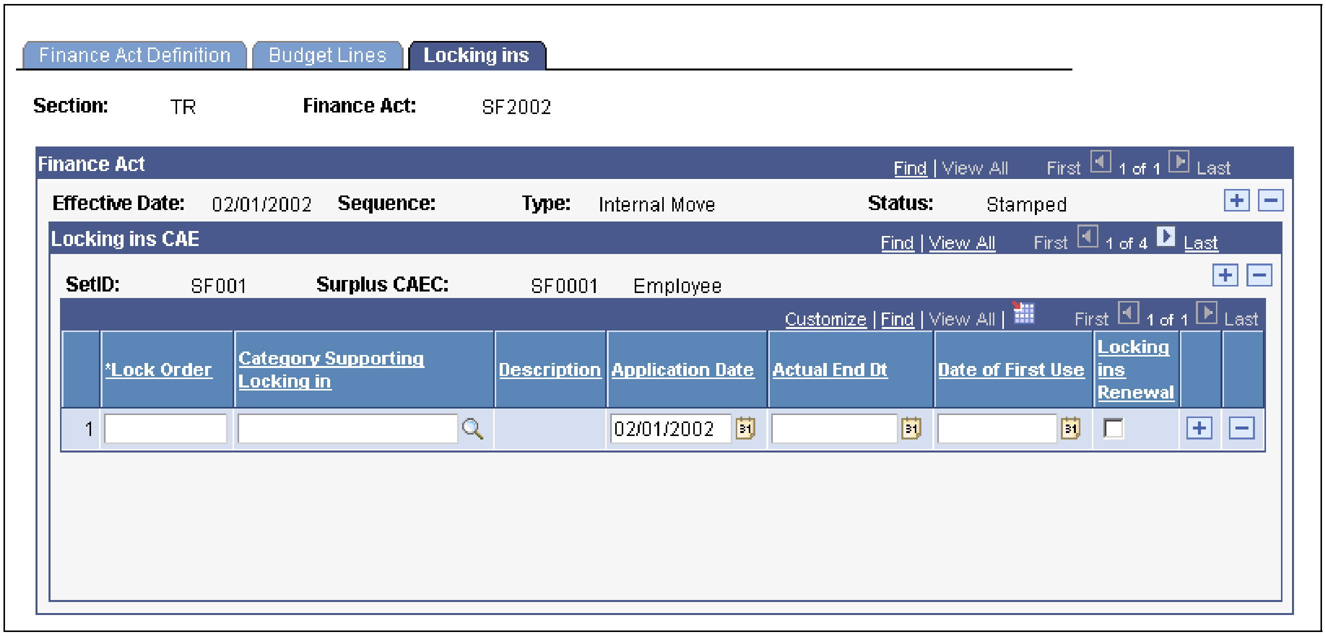
The system compiles the moves, stores the total in the Moves BHA/AHM field, and adds the total to BHA to create AHM. If the same type of move has been previously recorded, the carry over is calculated and displayed. The system also displays authorized overstaffing or locked-in CAE. CAE lock-ins might be made by a headcount manager after an employee is hired, returns from leave, or is granted a promotion.

See Also

Chapter 17, “Managing Headcount,” Calculating the Workforce, page 193

Locking In CAECs

Access the Locking ins page.



Locking ins page

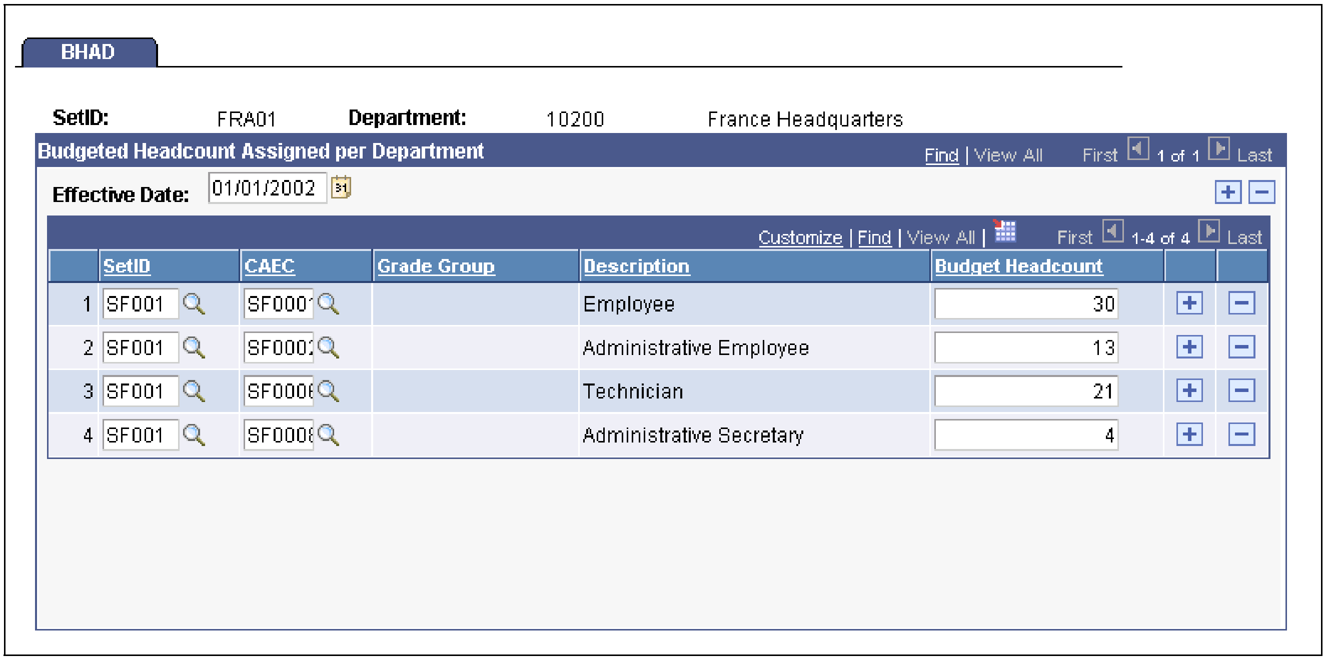
If the margin of the CAEC corresponding to an employee grade is not sufficient when an employee is hired, returns from leave, or is granted a promotion, you can lock in the necessary proration ratio in another CAEC. This enables you to overstaff the CAEC. In theory, the average indexes of CAECs that can be locked in are higher than the overstaffed CAEC indexes.

Use this page to set up in advance the CAECs that can be locked in by another CAEC. The system uses this list to determine if there is sufficient margin for the Surplus CAEC.

Lock Order	Assign a sequence to prioritize lock-ins.
Category Supporting Locking In	Select the CAEC.
Locking Ins Renewal	Select to extend the lock in.

Distributing Budgeted Headcount to Administrative Structures

Access the BHAD page.



BHAD page

Determine the headcount allocated for each department by CAEC or grade group. To allocate by CAEC, enter the setID and the CAEC. To allocate by grade group, enter the grade group.

Note. Be sure that the budgeted headcount entered here is not greater than the CAEC usable headcount.

Managing CAE

This section provides an overview of CAE management and discusses how to:

- Determine when CAE should be allocated.
- Prepare hires.
- Change budget attendance.
- Allocate CAE for new hires.
- Book CAE requests.
- Accept or deny CAE allocation requests.
- Delete CAE.
- Delete employee records.
- Request CAE deallocations.
- Accept or deny CAE deallocation requests.
- Change CAE.
- Prepare CAE changes.
- Deallocate active CAE.
- Accept or deny CAE change requests.
- Update counters.

- View information for a CAE before deleting the related action.
- Delete the move that implied the last CAE change.

Understanding CAE Management

Use CAE management to monitor how the organization uses budgeted headcount. CAE management is active only if you have activated the CAE Control flag when setting up Manage French Public Sector.

The *available margin* is the number of opened headcounts in a given CAEC that the organization can use to hire or promote employees.

Actions That Affect the CAE

Three different types of actions affect the CAE:

- Hiring or return actions that reduce the available margin and imply a CAE allocation.
- Leaves or terminations that increase the available margin and imply a CAE deallocation.
- Grade changes (with CAEC change) and the work-time percentage changes implying a CAE change.

  These actions entail the deallocation of the active CAE and the allocation of a new CAE.

Stamping and Validating Actions

For actions implying a change in budget attendance, the financial controller must stamp the CAE allocation or deallocation. Then the HR administrator must validate civil service position, grade, or work-time percentage moves to make changes effective in the employee record.

Each type of action must be validated. The process includes four successive steps, which can be made by different managers. The information is routed from one manager to the other via workflow.

To validate a CAE action:

1. Update the employee record: prepare the hiring, vacation, or grade change request, or the work time percentage change.
2. Allocate or deallocate CAE.
3. Obtain the financial controller's stamp.
4. Validate the action in the employee record.

See Also

Chapter 4, "Hiring French Public Sector Employees," Validating the Hiring Process, page 66

Pages Used to Manage CAE

Page Name	Object Name	Navigation	Usage
CAE Allocation	FPA_CA_CR_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation, CAE Allocation	Request a CAE allocation for a new hire.
CAE Booking	FPA_CA_CR_PNL2	Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation, CAE Booking	Book CAE requests.

Page Name	Object Name	Navigation	Usage
Headcount Manager Rejection	FPA_CA_CR_PNL4	• Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation, Headcount Manager Rejection • Workforce Administration, Headcount FPS, Manage CAE, CAE Change, Headcount Manager Rejection • Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation, Headcount Manager Rejection	Reject CAE allocation requests. This page is used by headcount managers.
CAE Allocation Stamp	FPA_CA_STMP_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation Stamp, CAE Allocation Stamp	Accept or deny a CAE allocation request.
CAE Details	FPA_CA_STMP_PNL2	• Workforce Administration, Headcount FPS, Manage CAE, CAE Allocation Stamp, CAE Details • Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation Stamp, CAE Details • Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation, CAE Details	View CAE data.
Delete CAE	FPA_CE_DENI_GRP	Workforce Administration, Headcount FPS, Manage CAE, Delete CAE	Delete CAE.
FPS Delete Id	RUNCTL_FPA250	Workforce Administration, Job Information, Delete ID FPS, FPS Delete Id	Delete employee records after a CAE is denied.
CAE Deallocation	FPA_CA_DS_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation, CAE Deallocation	Request a CAE deallocation for an employee.
CAE Detail	FPA_CA_STMP_PNL2	Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation, CAE Detail	View CAE data.

Page Name	Object Name	Navigation	Usage
CAE Deallocation Stamp	FPA_CA_STMP_DS_PNL	Workforce Administration, Headcount FPS, Manage CAE, CAE Deallocation Stamp	Accept or deny a CAE deallocation request.
CAE Deallocation and Alloc (CAE deallocation and allocation)	FPA_CA_CHNG_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Change, CAE Deallocation and Alloc	Prepare CAE changes. View data for the new CAE allocation and launch the deallocation process.
Deallocation for Change	FPA_CA_CHNG_PNL4	• Workforce Administration, Headcount FPS, Perform Exceptional Allocation, CAEC Deallocation • Click Deallocate CAE on the CAE Deallocation and Allocation page.	Deallocate active CAE.
CAE Change Stamp	FPA_CACH_STMP_PNL1	Workforce Administration, Headcount FPS, Manage CAE, CAE Change Stamp	Accept or deny a CAE change request.
Counter Update	RUNCTL_FPA2050	Workforce Administration, Headcount FPS, Calculate Headcount, Update Counter	Update counters by deferred processing; launch FPA2050.
CAE Procedures State	FPA_CA_STATUS	Workforce Administration, Headcount FPS, Manage CAE, Procedures	View CAE status.
CAE 1	FPA_CA_DISP_PNL1	Workforce Administration, Headcount FPS, Manage CAE, Track CAE, CAE 1	View CAE data.
CAE 2	FPA_CA_DISP_PNL2	Workforce Administration, Headcount FPS, Manage CAE, Track CAE, CAE 2	View CAE data.
CAE/Employee	FPA_CA_BY_SC_PNL	Workforce Administration, Headcount FPS, Manage CAE, CAE/Employee Inquire	View CAE data by employee.
CAEC Summary	FP_CA_CSB_PNL	Workforce Administration, Headcount FPS, Review Headcount, CAEC Summary	View all information for a CAE, including the employee to whom it is attributed, the status of the CAE, and the allocation date and stamp.
CAE Information	FPACAEDELETE_PNL1	Workforce Administration, Headcount FPS, Manage CAE, Delete CAE and Related Actions, CAE Information	View information for a CAE. Available information includes allocation dates, deallocation dates (if any), Finance act information, and lock in information.

Page Name	Object Name	Navigation	Usage
Delete CAE and Job Data	FPACAEDELETE_PNL2	Workforce Administration, Headcount FPS, Manage CAE, Delete CAE and Related Actions, Delete CAE and Job Data	View the actions that implied the last CAE change and delete the corresponding moves

Determining When CAE Should Be Allocated

The CAE uses a budget position ratio, equivalent to the employee proration ratio, in the CAEC corresponding to the employee grade. Only employees whose statuses authorize career data management are taken into account by the budget control.

Note. Activate the Budget Attendance flag on the Civil Service Position Definition page and the system tracks administrative situations needing CAE allocation.

A new CAE must be allocated when:

- An employee is hired into civil service position that implies budget attendance.
- An employee changes from a civil service position without budget attendance to a civil service position with budget attendance.

  This can occur upon return from parental or disability leave.

Preparing Hires

To prepare new hires for CAE allocation:

1. Access the Employee Record FPS component.
2. Enter values in the Section and Article fields on the Career - Classification page (this is mandatory):
   - If your organization includes several sectors, and if a Finance Act has been defined for each of them, indicate the section the employee is attached to, from the budget viewpoint.

     The sector corresponds to the FA Section.
   - To identify the budget line with a sufficient CAE margin to meet the employee hire, you must indicate if the employee is under the direction of the minister's office, central administration or decentralized departments.

     The data is equivalent to the article identifying a CAEC.
3. Continue the hire process as indicated in the Employee whose status allows career data area in the Hiring Employees section.
4. Save the employee record. A workflow process informs the manager that an employee has been hired and a CAE must be allocated.
5. Manually validate the hire once the CAE is booked and stamped.

See Also

Chapter 4, "Hiring French Public Sector Employees," page 51

Changing Budget Attendance

When an employee changes civil service positions and returns to the budgeted headcount, the system launches a CAE allocation process.

To change budget attendance:

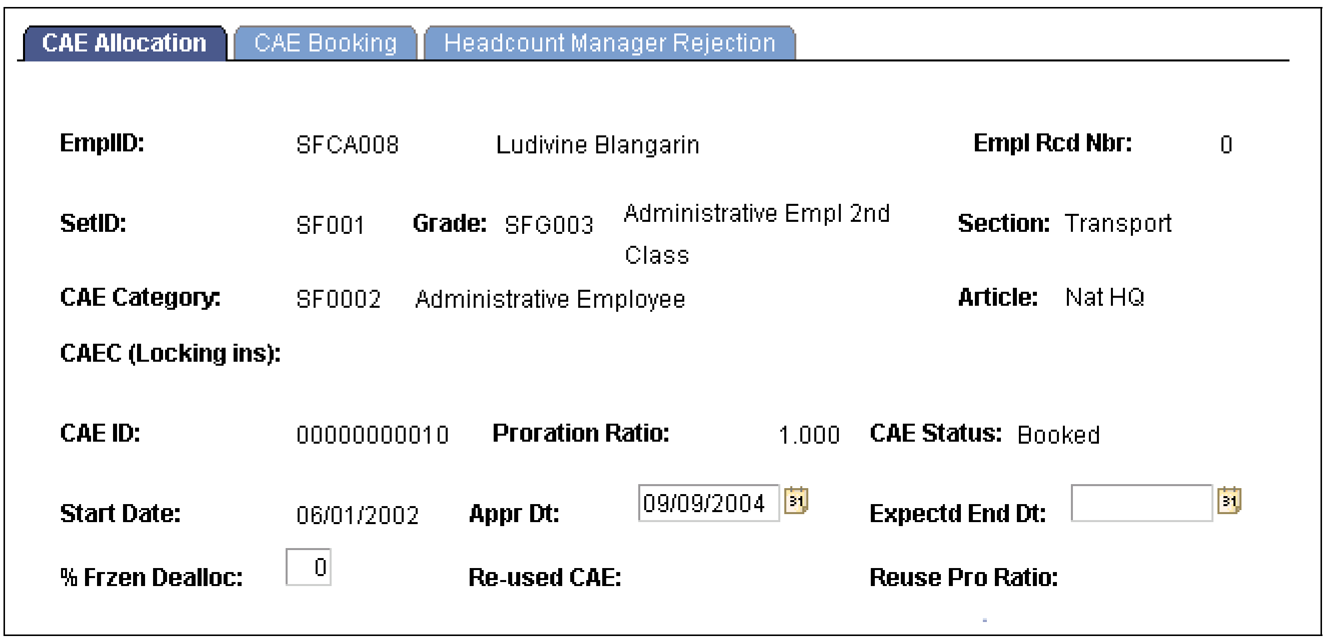
1. Access the Civil Service Position page (Workforce Administration, Job Information, Chg Civil Service Position FPS).
2. Select *Request* for the action status.
3. Enter the request information.
4. The request can be validated and accepted only after the CAE is allocated, booked, and stamped. If the financial controller rejects the CAE stamp, you must delete the CAE and then the employee record.

See Also

Chapter 14, "Managing Requests," page 147

Allocating CAE for New Hires

Access the CAE Allocation page.



CAE Allocation page

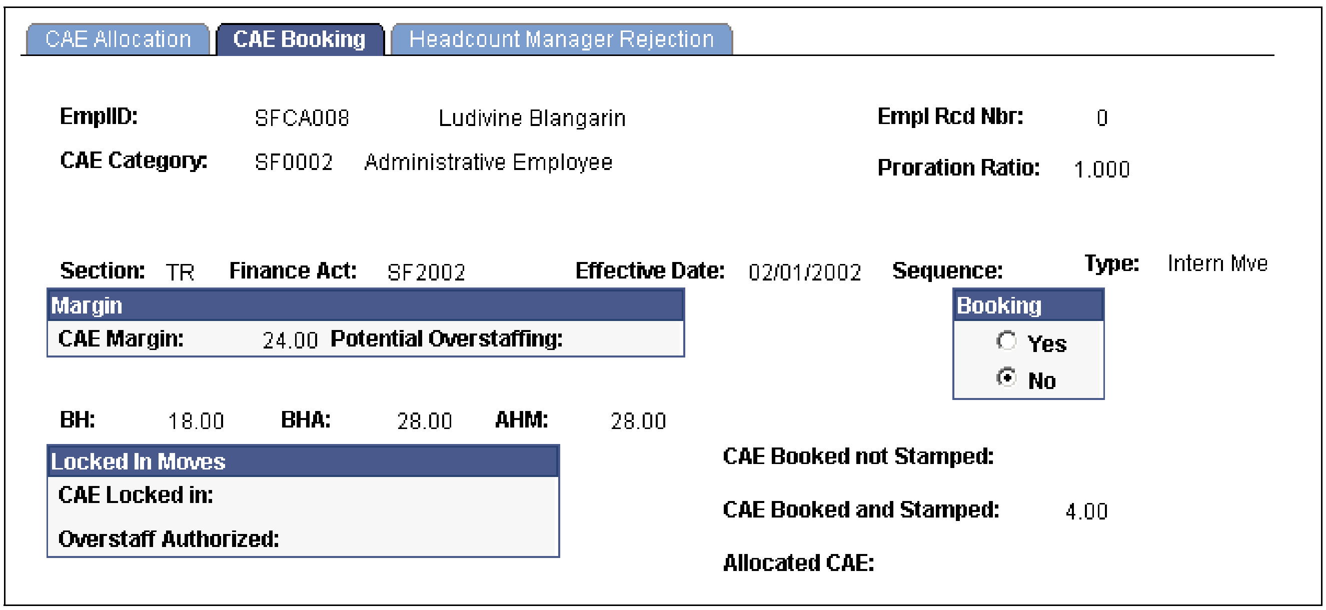
Once in receipt of the new hire, the manager must allocate CAE for the position. Allocating CAE confirms that there is ample headcount for the grade assigned to the employee being hired and creates a new CAE for the employee.

Employee ID, Empl Rcd Nbr (employee record number), **Grade, Section,** and **Article**	The system displays these values to help identify the CAE to be created.
CAE Category	Displays the CAEC associated with the grade.

CAE ID	Displays the value that is generated by the system.
Proration Ratio	Displays the ratio that depends on the employee civil service position and work time percentage.
CAE Status	Displays a value of *Booked.*
Appr Dt (approval date)	Enter the approval date.
Expected End Dt	Enter the expected end date, if known.
% Frzen Dealloc (frozen percentage at deallocation)	Enter the percentage of the FTE that is frozen. When the CAE is deallocated, and there is a hiring or promotions freeze, a percentage of the headcount is frozen and can not be used for hiring or promotion.

Booking CAE Requests

Access the CAE Booking page.



CAE Booking page

Margin

The values in this group box are automatically populated. Compare the CAE margin here with the proration ratio at the top of the page.

Booking

If the available CAE margin is higher than the employee proration ratio, book the CAE by selecting Yes. The number of CAEs booked but not stamped increases with the proration ratio. The CAE margin is likewise reduced.

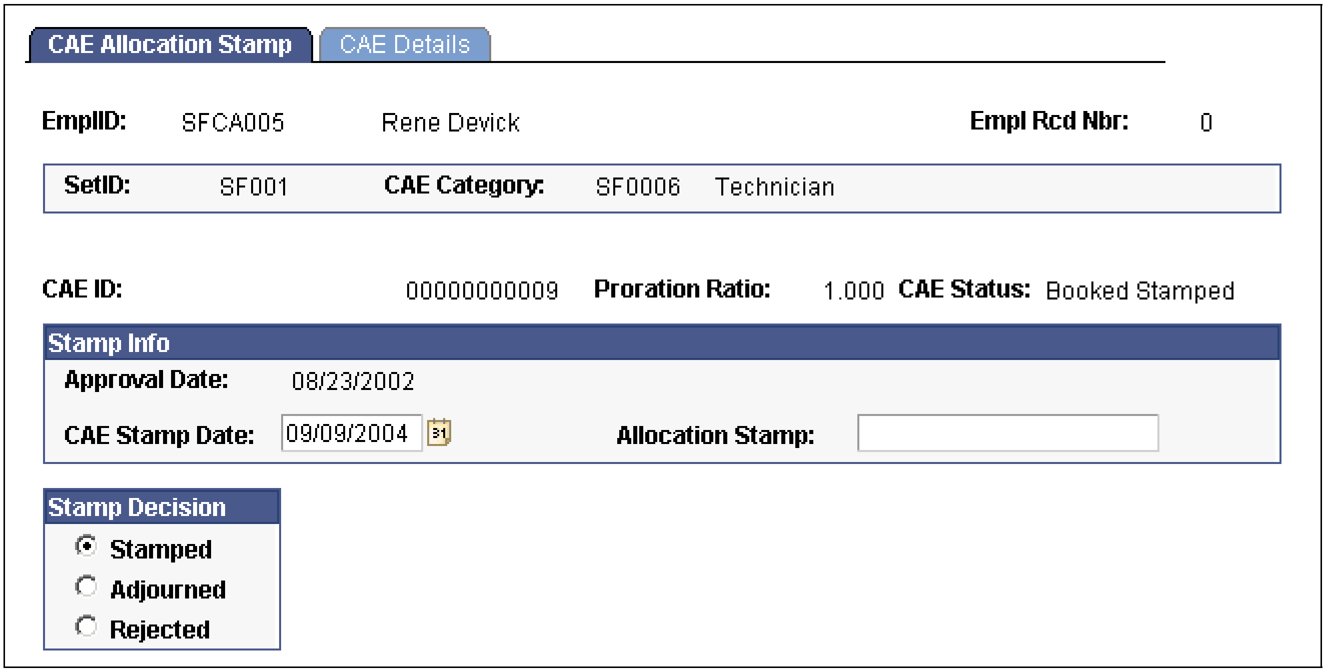
If the margin is lower than the proration ratio, you cannot access the Booking group box.

See Also

Chapter 17, "Managing Headcount," Booking CAE with an Insufficient Margin, page 190

Accepting or Denying CAE Allocation Requests

Access the CAE Allocation Stamp page.



CAE Allocation Stamp page

Stamp Decision

Update the CAE status. The values are:

Stamped: The CAE is booked and stamped, enter the CAE stamp date and the allocation stamp reference number. The system updates the Finance Act counters for the appropriate budget line and adds an entry on the personnel manager’s task list. The hire can be finalized.

Adjourned: The CAE is adjourned and the system notifies the headcount manager.

Rejected: The CAE is rejected and the system warns the headcount manager to delete the CAE.

Deleting CAE

Access the Delete CAE page.

Select the Delete CAE check box.

At the end of the transaction, the system modifies Finance Act counters. A new workflow item is routed to the personnel manager, who must store the deleted hiring record.

Deleting Employee Records

Access the FPS Delete Id page.

When a CAE request is denied and deleted for a new hire, you must delete the employee record.

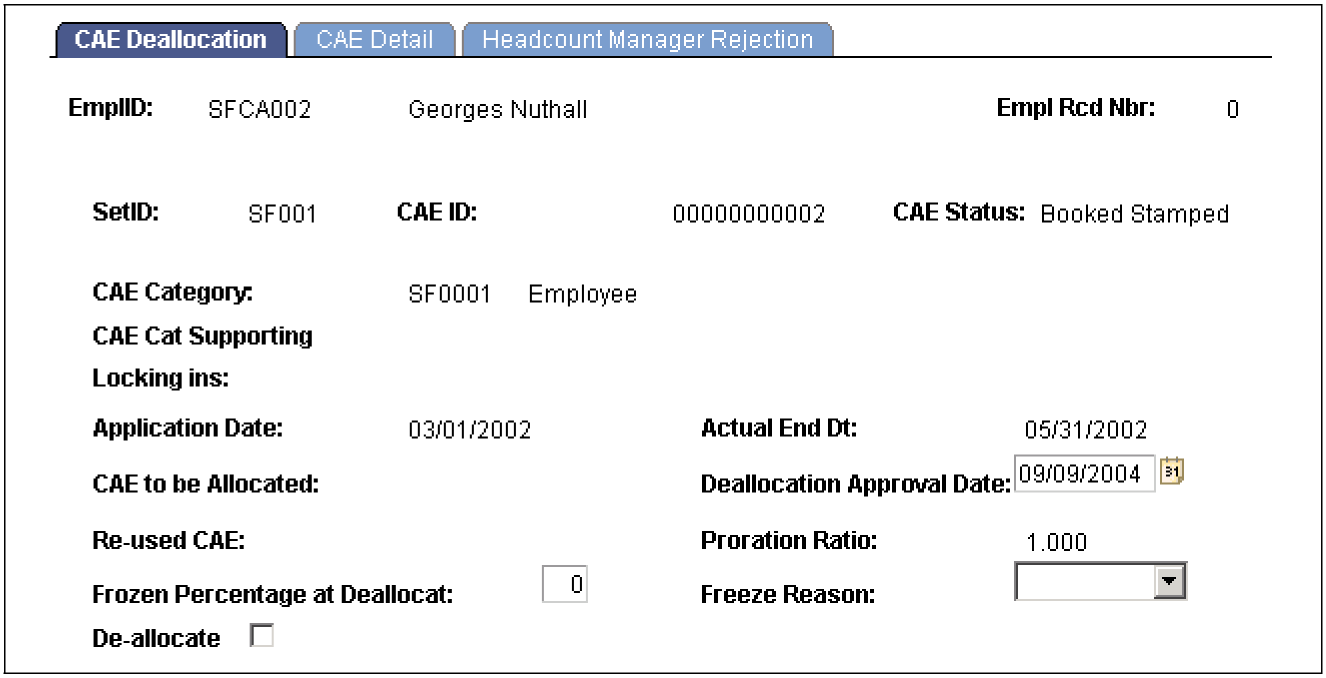
Select the employee ID to delete, then run the process to delete and store the employee data.

See Also

Chapter 4, "Hiring French Public Sector Employees," Deleting an Employee Hiring, page 69

Requesting CAE Deallocations

Access the CAE Deallocation page.



CAE Deallocation page

When an employee changes civil service positions and the new civil service position is a leave or a termination, the change removes the employee from the budget headcount, and you must deallocate the assigned CAE.

Actual End Date	Displays the effective date of the move recorded on the Civil Service Position page. It is the CAE deallocation date.
Frozen Percentage at Deallocat (frozen percentage at deallocation)	Enter this value if part of the ratio is frozen.
De-allocate	Select this check box.
Proration Ratio	Displays the budget position ratio.

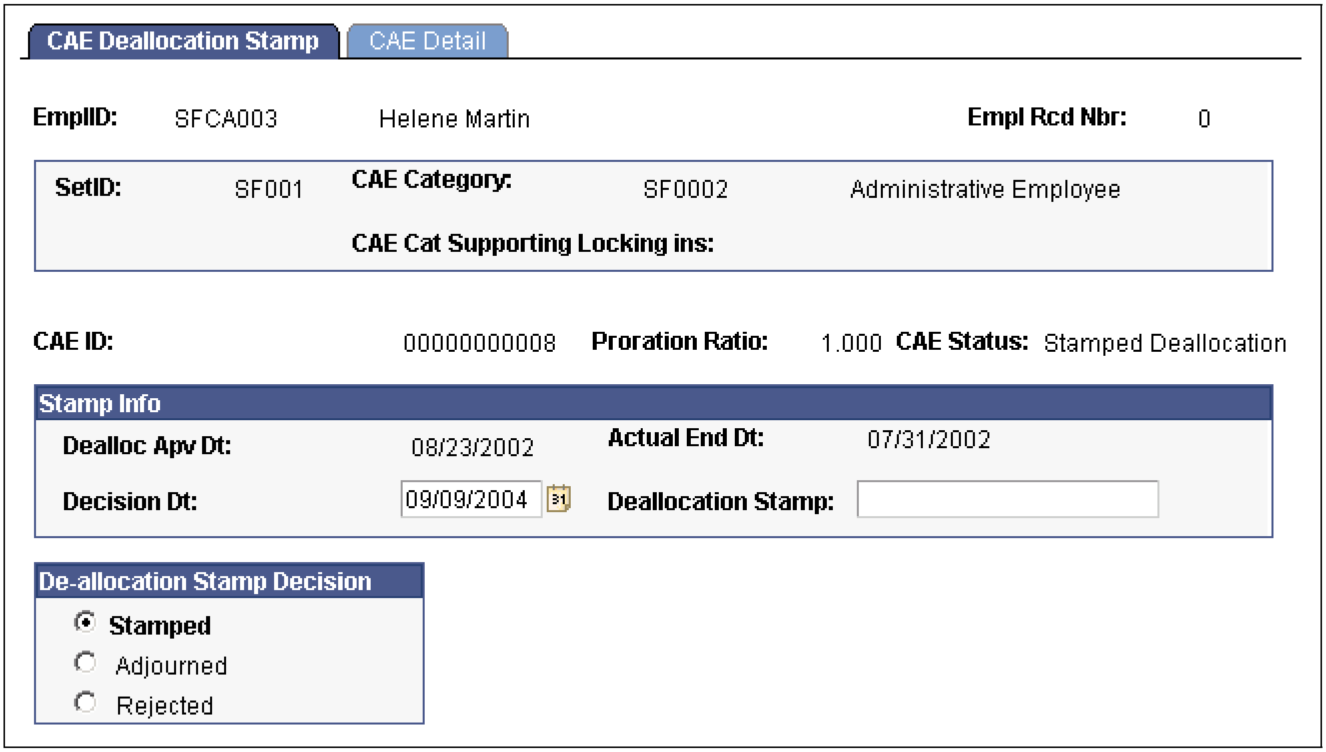
When you save the record, the system creates an addition to the personnel manager's task list.

See Also

Chapter 17, "Managing Headcount," Changing Budget Attendance, page 181

Accepting or Denying CAE Deallocation Requests

Access the CAE Deallocation Stamp page.



CAE Deallocation Stamp page

De-allocation Stamp Decision

Update the CAE status. Values are:

Stamped: The CAE is approved and you enter the decision date and the deallocation stamp number.

Adjourned: The decision is adjourned (postponed) and the system notifies the personnel manager.

Rejected: The stamp is rejected and the system informs the personnel manager. The manager can then delete the civil service position change request.

See Also

Chapter 14, “Managing Requests,” page 147

Changing CAE

You must change CAE when an action modifies the CAEC or the proration ratio.

Two transactions imply a CAEC change: a grade change request (with CAEC change) and a work time percentage change.

To change CAEC for a grade promotion:

1. Access the Increment Step/Promotion FPS component.
2. Enter the CAEC-altering data. Select Request for the action status.
3. Save the data. The system asks if a work time percentage change is planned in the same employee record on the grade change date.
4. Select Yes or No.

5. If you selected Yes, access the Working Time page.

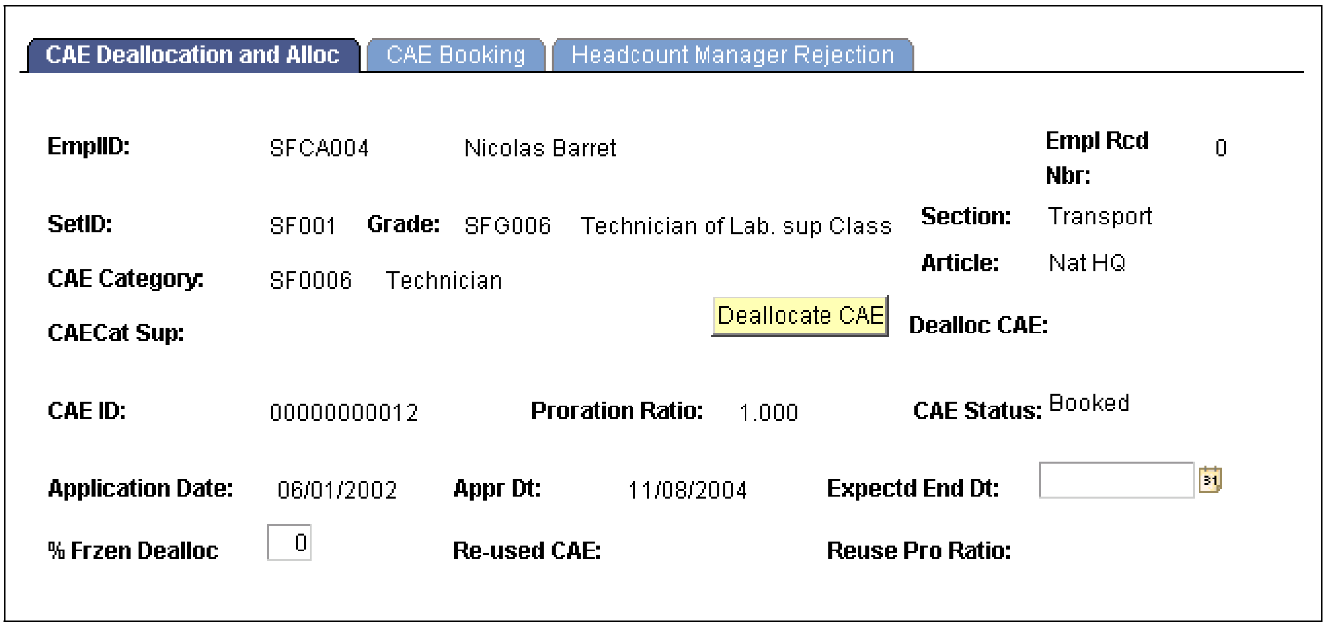
   When saving the request, the system enables you to process both requests (grade change and work time percentage change) at the same time.

6. If you selected No, the system asks the personnel manager to process the grade change request.

Note. If you change work time percentage without changing the grade, go directly to the Working Time page.

Preparing CAE Changes

Access the CAE Deallocation and Allocation page.



CAE Deallocation and Alloc page

Deallocate CAE — Click to access the Deallocation for Change page and deallocate active CAE.

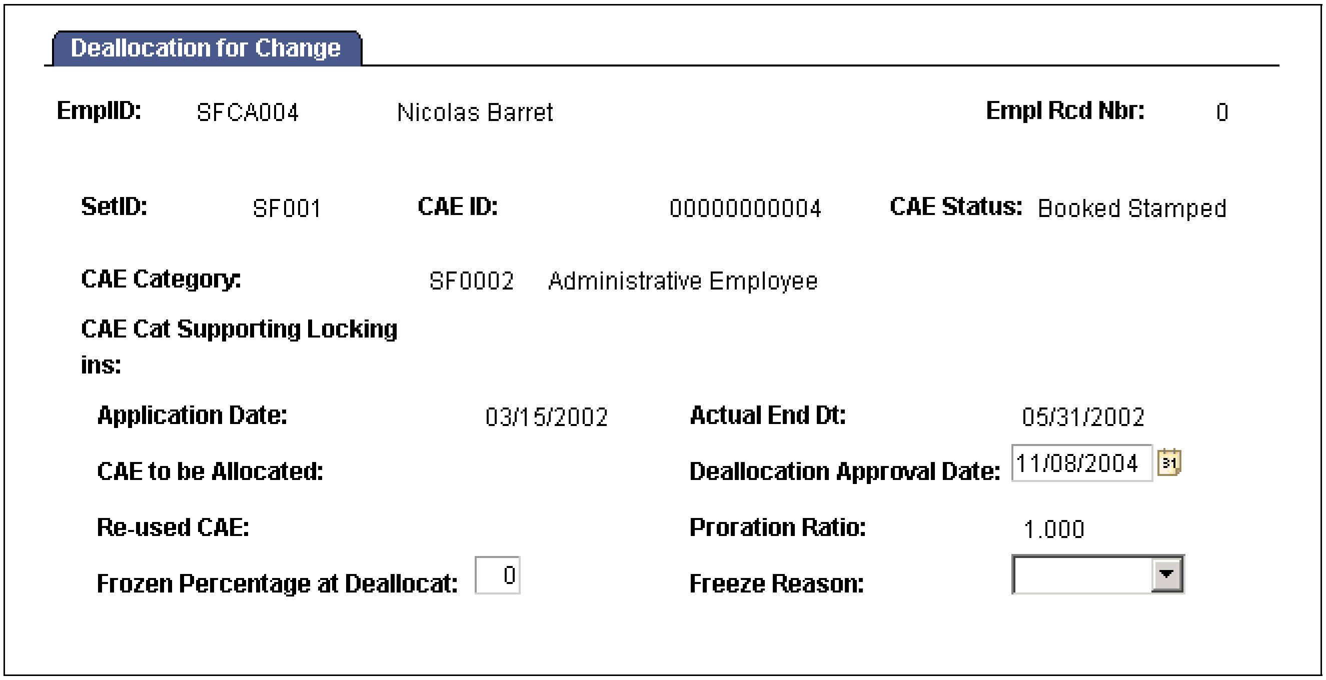
After you deallocate the CAE, the Deallocate CAE ID appears, and the CAE approval date and CAE ID are updated.

% Frzen Dealloc (percent frozen deallocation) — Corresponds to the CAE percentage that won't add up to the available margin at the CAE deallocation.

After you save the data, go to the CAE Booking page and book the CAE.

Deallocating Active CAE

Access the Deallocation for Change page.

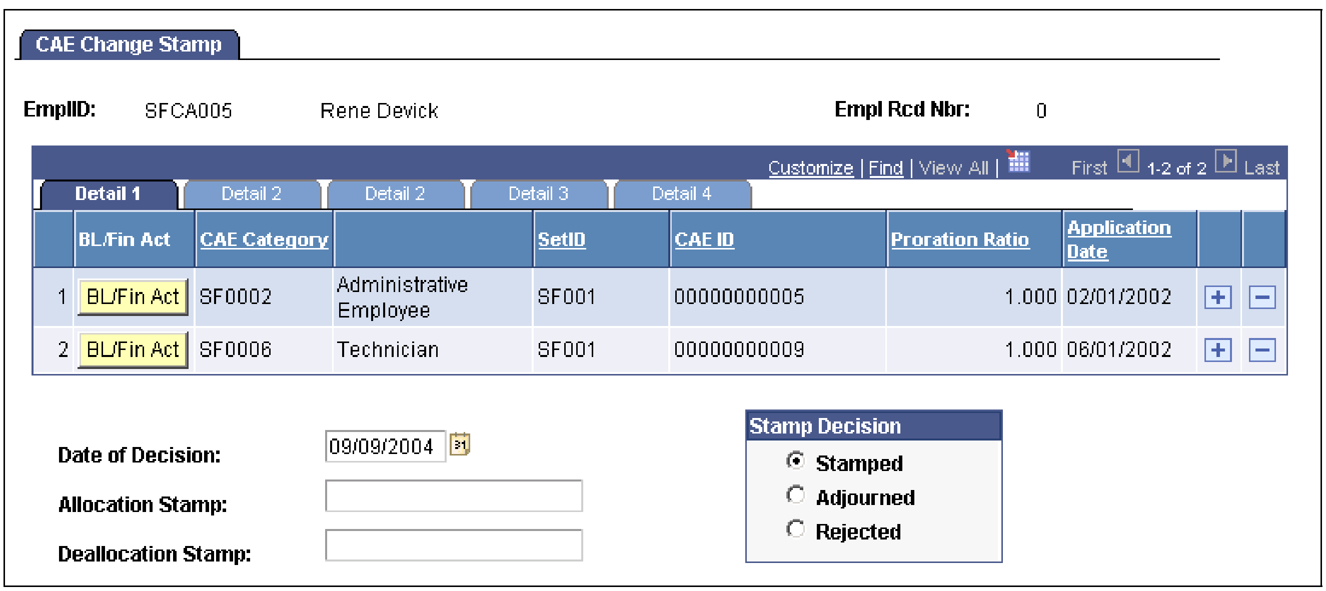


Deallocation for Change page

Enter the deallocation approval date, and, if necessary, the frozen percentage at deallocation and freeze reason.

Accepting or Denying CAE Change Requests

Access the CAE Change Stamp page.



CAE Change Stamp page

Stamp Decision

Update the CAE status. Values are:

Stamped: The old CAE is stamped deallocated and the new CAE is booked stamped. Enter the allocation stamp and deallocation stamp references, if necessary.

Adjourned: The CAE is adjourned and the system emails the headcount manager.

Rejected: The CAE is rejected and you must cancel the existing CAE using the Delete CAE page.

BL/Fin Act Click to view the budget line associated with the affiliated CAEC for the effective FA on the effective date.

Validating Grade Changes and Working Time

In the task list, the Grade Change Validation activity enables you to access the career and working time portion of the employee record, where you approve the grade promotion and/or work time change. If the stamp has been denied, the system issues an error message, and the grade or working time change request cannot be validated.

Updating Counters

Two procedures are used to update counters:

- Transactional updates.

  Each time a headcount manager or financial controller saves an action, the system updates the following counters: CAE Booked not Stamped, CAE Booked and Stamped, CAE De-allocated not Stamped, and CAE De-allocated and Stamped.

- Update by deferred processing.

  This process updates individual or all counters by request.

Both processes consider the effective dates and update CAE status from Booked to Active or De-allocated to Inactive as appropriate.

Transactional Update

For each transaction, the system first updates the counters associated with the active Finance Act. Then the counters consider the flows associated with the move of an employee.

Moves that affect CAEs and result in transactional updates are:

- Hiring preparations.
- Return preparations.
- Leaves.
- Promotions and demotions.
- Work time percentage changes.
- Financial controller stamps and rejections.

The flow is unweighted if the employee is 100% compensated. Its value is 1 for a budget entry or −1 for a budget absence. If the employee is not 100% compensated, the flow is weighted by the proration ratio.

Update by Deferred Processing

To launch this process:

1. Access the Counter Update page.
2. Enter the section and Finance Act.

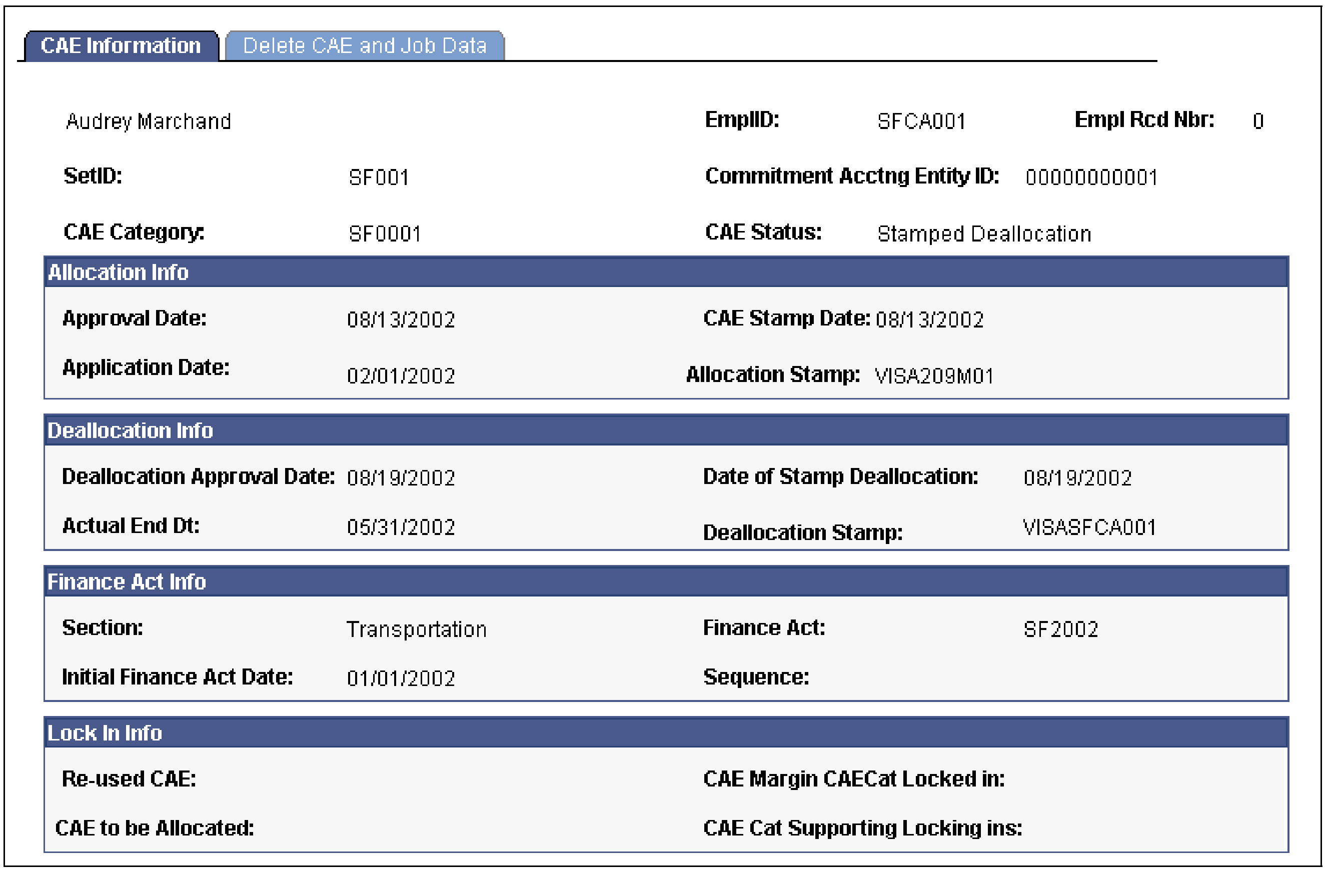
3. Enter the as of date; otherwise, the system uses today's date.
4. To update a specific CAEC, enter its ID. Leave this field blank to process all CAECs.

The process also updates the CAE statuses. When the application date is reached, the status changes from Booked Stamped to Active. When the deallocation date is reached, the status changes from De-allocated Stamped to Deallocated.

The process also identifies two errors. When the application date is reached, CAEs Booked not Stamped become Booked Overdue not Stamped. When the deallocation date is reached, CAEs De-allocated no Stamped become De-allocated Overdue not Stamped.

Viewing Information for a CAE Before Deleting the Related Action

Access the CAE Information page.



CAE Information | Delete CAE and Job Data

Audrey Marchand EmplID: SFCA001 Empl Rcd Nbr: 0

SetID: SF001 Commitment Acctng Entity ID: 00000000001

CAE Category: SF0001 CAE Status: Stamped Deallocation

Allocation Info

Approval Date: 08/13/2002 CAE Stamp Date: 08/13/2002

Application Date: 02/01/2002 Allocation Stamp: VISA209M01

Deallocation Info

Deallocation Approval Date: 08/19/2002 Date of Stamp Deallocation: 08/19/2002

Actual End Dt: 05/31/2002 Deallocation Stamp: VISASFCA001

Finance Act Info

Section: Transportation Finance Act: SF2002

Initial Finance Act Date: 01/01/2002 Sequence:

Lock In Info

Re-used CAE: CAE Margin CAECat Locked in:

CAE to be Allocated: CAE Cat Supporting Locking ins:

CAE Information page

Once you have allocated CAE and the corresponding move (grade promotion, civil service position change, or working time change) has been approved, you cannot delete the move. However, in a certain cases, you may have to delete the move. You can delete the move only using the Delete CAE and Related Actions component.

When entering the Delete CAE and Related Actions component, the search box displays only the latest CAE for each employee, whether the CAE is booked, active, or deallocated.

This page displays information about the CAE, including:

- Allocation and deallocation approval dates, stamps, and stamp dates.
- Financial Act information for the CAE.

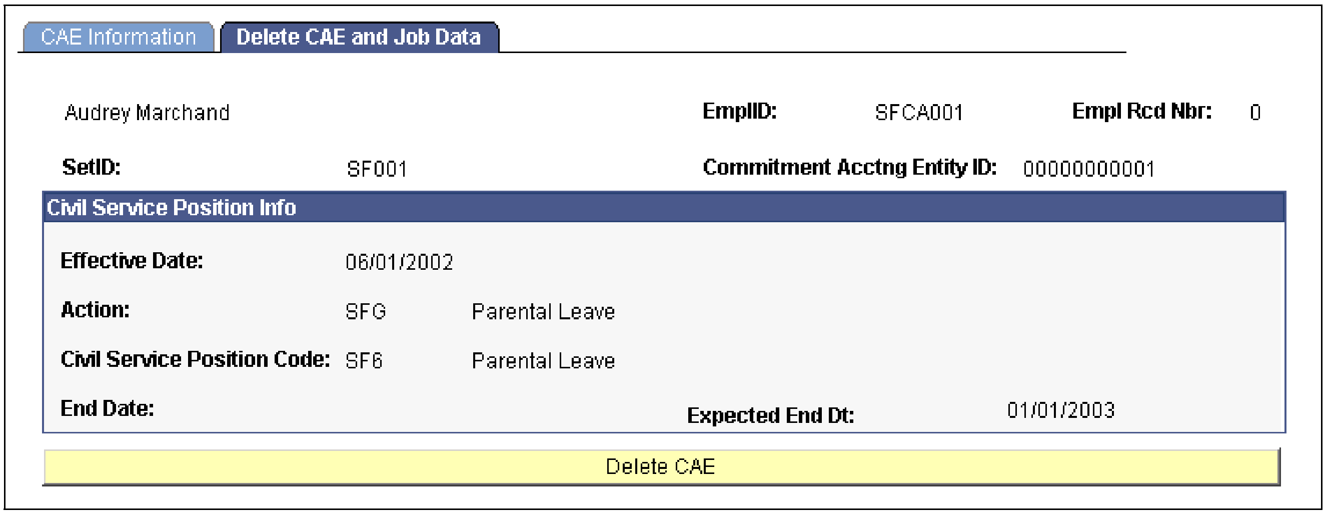
- Lock in information, if applicable.

  The section "Booking CAE with an Insufficient Margin" defines the fields in the Lock In Info group box.

  See Chapter 17, "Managing Headcount," Booking CAE with an Insufficient Margin, page 190.

Deleting the Move That Implied the Last CAE Change

Access the Delete CAE and Job Data page.



Delete CAE and Job Data page

Delete CAE Click to delete the CAE and the action related to the move.

If the move is:

- A hire, the system marks the CAE as deleted and deletes the emplID.
- A return (whether or not the return is associated with a grade and/or working time change), the system marks the CAE as deleted and suppresses the corresponding moves.
- A grade and/or working time change, the system marks the current CAE as delete and changes the end date of the previous CAE so that the employee is active under the previous CAE.

  The system deletes the career and/or working time moves associated with the deleted CAE.
- A leave or termination, the system changes the CAE end date so that the CAE is active again and deletes the civil service position corresponding to the leave or termination.

Booking CAE with an Insufficient Margin

You may need to book CAE when the CAEC margin is either zero or less than the employee proration ratio. To allocate this CAE, you can prebook, lock in, or overstaff.

Before prebooking, locking in, or overstaffing, access the CAE Allocation page and enter the approval date and expected end date of the CAE you are booking.

This section discusses how to:

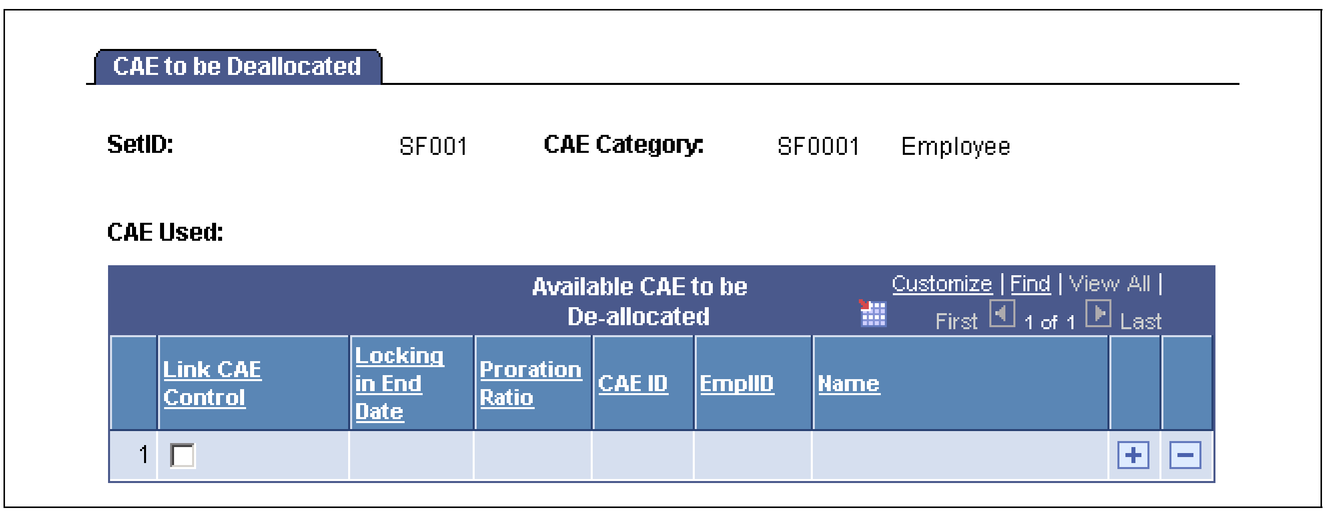
- Prebook.
- Lock in CAECs.
- End lock-ins for CAECs.
- Overstaff.

Pages Used to Book CAE with an Insufficient Margin

Page Name	Object Name	Navigation	Usage
CAE to be Deallocated	FP_AVLBL_CA_PNL	Workforce Administration, Headcount FPS, Perform Exceptional Allocation, Links Other CAE	Prebook or lock in CAE.
CAEC to be Locked in	FPM_CA_LCK_HDCNT	Workforce Administration, Headcount FPS, Perform Exceptional Allocation, CAEC Locking Ins	View CAECs that can support a lock-in and select a lock-in.
Unlock CAE	FPA_CA_OVF_RO_PNL1	Workforce Administration, Headcount FPS, Manage CAE, Reduction in Overstaff	End lock-ins for CAECs.

Prebooking

Access the CAE to be Deallocated page.



CAE to be Deallocated page

The page displays all CAEs that:

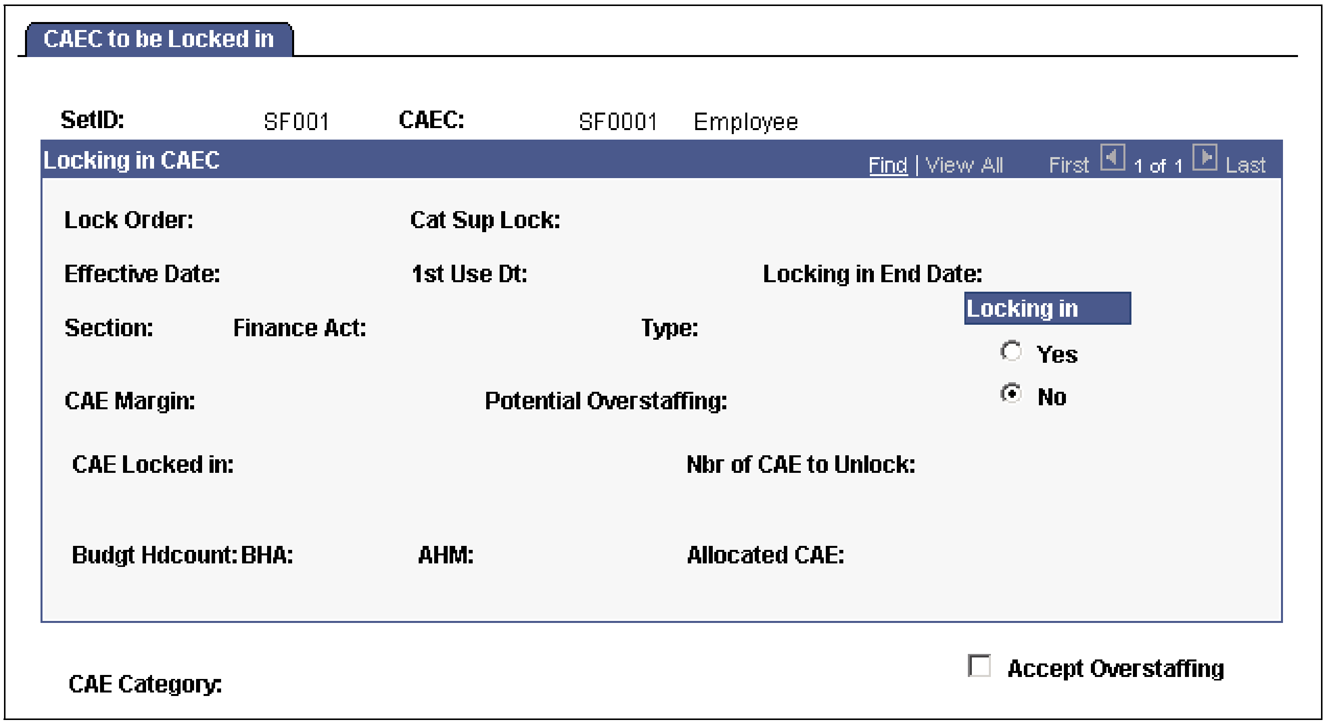
- Belong to the same CAEC.
- Will be deallocated after today’s date.
- Will be deallocated on the application date of the CAE you are processing.

Select the CAE to be reused in the Link CAE Control column. The system does not recalculate the margin. The selected CAE is considered reused CAE. The CAE being processed is considered CAE to be allocated.

If no deallocation is expected before the new CAE application date, you can lock in another CAE. To lock in, you check another CAEC's available margin and lock in the necessary budget position ratio. This generates an overstaffing in the CAEC with an insufficient margin. Click the Lock In CAEC button on the CAE Booking page.

Locking In CAECs

Access the CAEC to be Locked in page.



CAEC to be Locked in page

This page displays the CAECs that can support a lock in.

Lock Order Displays the lock order that determines the priority of CAECs to be locked in.

Locking In Select *Yes* when you have identified a CAEC with a sufficient CAE margin, . The category selected supports a lock-in while an Authorized Overstaffing is generated in the CAEC to be allocated.

Ending Lock-ins for CAECs

Access the Unlock CAE page.

Select End Lock In for those CAECs you want to unlock. The CAE Margin and Overstaff Authorized values are automatically updated. The associated CAE proration ratio is subtracted from both values.

Overstaffing

When pre-booking and locking in are not possible, you can generate a special overstaffing in the CAEC and create the CAE.

To overstaff:

1. Access the CAE Allocation page.
2. Enter the approval date, and expected end date, if known.
3. Access the CAE Booking page.
4. Click the Overstaffing button.

The system increases the number of Potential Overstaffing and CAEs Booked not Stamped by the value of the employee proration ratio. The financial controller must stamp the overstaffing activity. The system reduces overstaffing as soon as it is possible.

Calculating the Workforce

This section provides an overview of the workforce calculation, lists prerequisites, and discusses how to calculate the workforce.

Understanding Workforce Calculations

You can calculate your workforce on a monthly basis.

There are two main processes to calculate your workforce. The first process, the Headcount/Grade and Dept SQR process (FPA2000), displays its results on inquiry pages. The second process, the FTE Calculation SQR process (FPA2001), can be used by external analysis tools.

Both processes apply the following rules:

- The headcount is determined for each month in the calendar year captured at the beginning of the process.
- Statutory headcount, budget headcount, WFTE (working FTE), and PFTE (paid FTE) are calculated at the same time, depending on the civil service position setup.
- An employee’s civil service position at the end of the month determines its place in the calculation.
- Paid FTE values consider the employee proration ratios, which are determined by civil service positions and work time percentages.
- Employees at retirement age are not considered for headcount.
- If an employee’s last civil service position is an interrupted position, the headcount calculations consider the position’s expected end date.

Prerequisites

You must launch the Merge process before calculating the workforce.

See Also

Chapter 16, “Merging French Public Sector and Human Resources Files,” page 161

Pages Used to Calculate the Workforce

Page Name	Object Name	Navigation	Usage
Employees/Grade and Depart (employees/grade and department)	RUNCTL_FPA2000	Workforce Administration, Headcount FPS, Calculate Headcount, Employees/Grade and Dept	Launch the Headcount/Grade and Dept process (FPA2000). The process calculates the civil service position, budget workforce, and FTEs. The end of the month headcount is calculated by grade, corps, category, department, and gender.
Headcount Results 1	FPAHEADCNT01_PNL	Workforce Administration, Headcount FPS, Review Headcount, Headcount Results, Headcount Results 1	View FTEs by grade and gender for a given year and department.
Headcount Results 2	FPAHEADCNT02_PNL	Workforce Administration, Headcount FPS, Review Headcount, Headcount Results, Headcount Results 2	View headcount data by grade and gender for a given year and department.
Headcount Results 3	FPAHEADCNT03_PNL	Workforce Administration, Headcount FPS, Review Headcount, Headcount Results, Headcount Results 3	View headcount data by corps for a given year and department.
BHAS Inquire 1	FPACAHDCNT01_PNL	Workforce Administration, Headcount FPS, Review Headcount, BHAS, BHAS Inquire 1	View BHAD, headcount by CAEC, year, and department.
BHAS Inquire 2	FPACAHDCNT02_PNL	Workforce Administration, Headcount FPS, Review Headcount, BHAS, BHAS Inquire 2	View BHAD, headcount by grade group data, year, and department.
FTE Calculation	RUNCTL_FPA2001	Workforce Administration, Headcount FPS, Calculate Headcount, Calculate FTE	Launch FTE Calculation process (FPA2001). The system calculates physical workforce, WFTEs, paid FTEs, PFTEs, and indexical mass.

Glossary of PeopleSoft Terms

absence entitlement — This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take — This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career — In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution — In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization — In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan — In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program — In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

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 split — The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator — You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason — The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template

In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity

In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage

In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar

In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function

In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type

In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement

In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

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.

analysis database

In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging
PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist
Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan
In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule
In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class
An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair
In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience
In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server
A server that is set up to verify users of the system.

base time period
In PeopleSoft Business Planning, the lowest level time period in a calendar.

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.

billing career
In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief
In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book
In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

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. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

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.

checkbook — In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code — In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class — In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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.*

clearance — In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

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.

cohort — In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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.

collection rule — In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key — See *communication key.*

communication key — In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

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.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class.*

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

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 cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

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.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 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.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects 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.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

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.

financial aid term — In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item — A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund — In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap — In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table — In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit — Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template — Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process — Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group — In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

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.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI — An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file — Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group — In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components — In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment — In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

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.

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.

LMS — Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load — In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality — In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location

Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task

In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

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.

mass change

In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

match group

In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server

Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity

In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL

Meta-SQL constructs expand into platform-specific Structured Query Language (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

In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency

The ability to process transactions in a currency other than the business unit's base currency.

national allowance

In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need

In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree
A tree that is based on a detail structure, but the detail values are not used.

pagelet
Each block of content on the home page 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.

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 *compensation object.*

partner
A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle
In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle
In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item
In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode
PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event
See *event.*

PeopleSoft Pure Internet Architecture
The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.

person of interest
A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio
In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

plan
In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan 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.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

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.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

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 a Structured Query Report (SQR), a COBOL or Application Engine 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 A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

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.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

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.

regional sourcing In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

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.

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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

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.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

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.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

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 key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

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.

speed key See *communication key.*

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.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
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.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
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 time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
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.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

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.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

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.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

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 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.

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.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.

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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

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.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

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.

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.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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